PropertyIQ™

Release Notes

June 2023

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SUMMARY

USER PERMISSIONS - EXPORT

1. **New separate export permissions –** Changes have been made to user export permissions to improve controls and provide more flexibility to administrators to manage the export of different types of data and reports by users.

   Changes include:

   - All export permissions have been moved to their own section on the Roles permissions screen and will now appear under the *Utilities section > Exports*.
   - Under *Exports* permissions, there are now 4 options:
     - Building Data – This controls access to the *Utilities>Export Building Data menu* for the export of documents, files and emails for a selected building.
     - Budget Reports – This controls access to the *Export* button for budget reports on the *Building>Budget>Set Budget>Set Instalments>Instalments screen*.
     - Arrears List – This controls access to the *Export to CSV* button for arrears reports on the *Reporting>Lot>Arrears List screen*.
     - Export Data – This controls the bulk export buttons everywhere else e.g. buildings, lots, chart of accounts, suppliers.

BUILDING DATA EXPORT - UTILITIES MENU

2. **Building data export –** When exporting building documents and files under *Utilities > Export Building Data*, you can now filter by a single Schedule. This will be helpful to Victorian clients who manage multi-OCs and you need to export documents for a single OC only.

   Changes to the export screen

   - The schedule filter **will** be shown only when the 'Documents & Files' option **is selected**, and is positioned next to the building filter. *Note: Incoming/Outgoing Email files are not schedule specific and cannot be filtered.*
   - This filter **will not** be shown when the selected building has only one (1) active schedule.
   - When the selected building has more than one (1) active schedule, the filter dropdown will show all active schedules in the building, with 'All Schedules' selected by default.

   Changes to the export .zip file (for buildings with multiple schedules)

   - When exporting 'Documents & Files' **AND** all schedules has been selected, the Documents folder will have sub-folders for each schedule (each containing only documents linked to that schedule) and a sub-folder for 'All Schedules' (containing documents NOT linked to any schedule).
   - When exporting 'Documents & Files' **AND** a single schedule has been selected, the Documents folder will have a sub-folder for that schedule only (containing only documents linked to that schedule) and a sub-folder for 'All Schedules' (contain documents NOT linked to any schedule).

REPORTING

3. **Arrears list export file** – Improvements have been made to the formatting and content of the arrears export file to improve usability and filtering of key information. Changes include:
   - Updated sort order – The sort order will use the parameter selected by the user in the *Sort>Print Sequence field* (i.e S/Plan or Building Name), THEN Lot number (ascending), THEN Levy due date (ascending).
   - Existing column 'Phone' renamed to 'PhoneAh'. It will continue to populate the Ah number for the lot.
   - New column for 'PhoneBh'. This will populate the Bh number for the lot.
   - New column for 'Mobile'. This will populate the Mobile number for the lot.
   - New column for 'Committee'. This will populate a Y or N depending on whether the lot is an active committee member.

4. **Forgotten password email** – The appearance of the forgotten password email has been improved, and the links within the email will now remain valid for 1 hour (instead of 15 minutes) to ensure adequate time to reset passwords whilst maintaining account security.
5. **Opening balances > Interest levy dates** – When setting up a new building and entering opening balances with interest levies, previously the opening balances were out by the interest amount (interest not being included as it should). This has been fixed, so when locking opening balances for new buildings it will check and enforce interest levies to be dated the day before the building's opening balance date. This will ensure interest amounts are included in opening balance totals and financial reports and ledgers are displaying correctly.

! Important notification for users of PIQ SMS feature

Please be advised that from **1 June 2023**, network operators in the UK will block international long codes. This means that any SMS messages sent to UK mobile numbers using PropertyIQ SMS will not be delivered.