PropertyIQ™

Release Notes

March 2024

This release includes changes to:

- PropertyIQ
- PropertyIQ Portal

CONTENTS

PropertyIQ 2

BAS 2

Building Information (Inc StrataHub - NSW) 2

Related Buildings 3

Changes for Community Titles Legislation (WA) 4

SMS 5

General 6

PropertyIQ Portal 6

General 6

PropertyIQ – Detailed 7

Item 1 - BAS History & Lodgements screen 7

Item 2 – Building Information accordion (Inc StrataHub - NSW) 9

Items 3 & 4 - Related Buildings 10

Item 6 – Changes for Community Titles legislation (WA) 12

Items 7, 8 & 9 – SMS 17

BAS

1) **BAS History & Lodgements screen –** You can now view and manage your historical BAS records in one place from a new button called 'History & Lodgements' on the *End of Period>BAS* screen. The existing 'Settings' button has also been repositioned next to it for workflow purposes.

   Note: BAS history will only be shown from March 2024 release, when BAS snapshots started to be saved.

   - View, sort and filter the list of BAS records: Sort and filter by Folio, Manager, Period From and To dates, Type (refund or payment), Building, Building address, Schedule, ABN, Amount and Status.
   - View an individual record in more detail: Review GST allocations and totals (on-screen reflection of the GST Summary report), and open the PDF GST Summary Report using a shortcut button.
   - Update BAS record status: When viewing an individual record, you can manually update the BAS status from 'Pending' to 'Lodged (Manually)' to identify finalised and lodged BAS reports. *Note*: Once integration with the ATO is completed and BAS can be automatically lodged, it'll introduce a third status.

   You can view detailed screenshots below.

BUILDING INFORMATION (INC STRATAHUB - NSW)

2) **Improvements to Building Information accordion -** You can now record more information under *Building card>Info tab>Building Information accordion*. Changes to this screen will be reflected in the building's *Log of Changes* tab.

   For NSW clients, this includes additional required fields for StrataHub and recording the information for multiple building structures reported under the scheme (strata plan).

   - View and record information such as
     - **Building Reference**
       - The default value for Building #1 is [Street Name]+[Street Number], separated by a space.
       - Reference is mandatory, max 100 characters, must be unique for NSW buildings and cannot contain invalid special characters. Otherwise an error message will be shown.
     - **Class 2 building** (ticked or unticked)
     - **Number of Storeys Above Ground** (mandatory if Class 2 building is ticked)
     - **Annual Fire Safety Statement date**
     - **Interim Occupation Certificate date**
     - **Final Occupation Certificate date**
     - **Has a NABERS rating** (ticked or unticked)
     - **Individual NABERS ratings** for Energy, Indoor, Waste and Water.
       - When 'Has NABERS rating' is ticked, the individual ratings are mandatory. Rating options are 0-6 in 0.5 increments.

- Multi-buildings – For multiple building structures reported under the scheme (strata plan), you can add the additional sub-buildings and capture the above information for each sub-building.

You can view a detailed screenshot below.

NOTE: This change has been specifically made for StrataHub reporting requirements with NSW Government, and is the second phase of changes being released for our upcoming StrataHub integration for NSW clients. As this may still be useful to all, it's been made available to all clients in all States. If you have suggestions on what other fields would be useful on the new *Building Information* accordion, please submit your development suggestions to support@propertyiq.com.au.

What you need to do (NSW clients)

- In preparation for our StrataHub integration, you may like to start entering this information for your buildings at your own pace.
- A new *Contacts* screen is still yet to be released which will also require updating, so you may like to wait until all fields are available.

RELATED BUILDINGS

3) **Add related buildings managed by another Strata Manager** – You can now manually record a related building that is managed by another Strata Manager under the *Building card>Info>Related Buildings screen* using the *Add Other* button. These will also be included in the Related Buildings Report.

   You can view a detailed screenshot below.

4) **Related Buildings report –** Changes to the report have been made to include:

   - strata manager name for the building in a new column; and
   - new section for 'Other Buildings', to include buildings manually added to the *Related Buildings* screen.

   You can view a detailed screenshot below.

5) **Link types of Related Lots (non-VIC buildings)** – When viewing the *Related Lots* accordion on a lot card for a non-Victorian building, lots will only show in the list where the Link Type is 'Linked Owner' (i.e lot contact details are shared between lots). You will not see the other types of 'Linked Lot', 'Primary' or 'Secondary' which is only relevant for VIC buildings. The screen is unchanged for buildings in VIC.

6) **Community Titles schemes –** We've made some improvements to help WA clients manage new Community Titles schemes in PIQ. For more information on community titles, view the WA Government's website.

Getting started

a) You can add each community corporation as a new building in PIQ. Each community corporation in the community scheme should be setup as a separate building, allowing you to have separate councils, budgets, financial reports, lot owners etc.

b) You can classify a community corporation using the existing *Building Type* field on the building card. Select the building type of 'Community'.

c) You can record the related community corporations in the *Related Buildings* accordion on each building card (also see changes on Related Buildings above). In the Strata Roll Report/Scheme Contacts Register, you must disclose related community corporations (even when they're managed by another strata manager).

System changes for WA building of building type 'Community'

When selecting the building type of 'Community', you'll see the below changes in PIQ.

- **Building card > Tier**
  - A new 'Tier' field is displayed on the building card. The options are Tier 1, Tier 2 and Tier 3. It will be blank by default and is not mandatory.
- **Committee / Council**
  - New positions – New positions of 'Officer' and 'Tier Representative' are available to select from the position dropdown.
- **Templates**
  - New due/levy templates are available for due notices, special notice, arrears notice, final notice and legal notice which references Community Titles legislation.
  - New info certificate template is available under the default list of WA templates called 'WA Section 97 Certificate' and will be used when generating certificates for WA buildings of Type 'Community'.
- **Reporting**
  - Report terminology – Reports will use the appropriate terminology in report headers and will display 'Community Corporation', 'C/Corp' or 'CC' depending on the report type.
  - Strata Roll report renamed to Scheme Contacts Register – When generating a Strata Roll report for a WA Community building, the report header will be automatically changed to "Scheme Contacts Register". There have been no other changes to the reporting screen or report; it has simply been renamed to use the correct terminology for a community corporation.
  - Scheme Contacts Register to include Related Buildings Report - When selecting a WA Community building in the reporting screen, the checkbox 'Include Related Buildings' will be ticked by default to ensure disclosure of related community corporations.
  - Tier included in strata roll report / scheme contacts register - When generating the scheme contacts register, the building's Tier will be displayed in the report.

- Tier included in building export – When generating a building export that includes one or more WA Community buildings, the Tier of the building/s will be included in the export.

You can view detailed screenshots below.

SMS

7) **New variable charge for SMS** – Automatically charge SMS messages to buildings using a new variable charge called 'SMS Message' in the variable charge schedule. This'll assist you in recovering costs and generating additional income.
    - A variable charge to the building will be created when:
        - The building has an SMS variable charge amount set that is greater than $0.00; and
        - A SMS has been successfully sent from a Lot, Committee Member or Work Order screen.
    - Suppliers screen - SMS messages sent directly from the Suppliers screen cannot be on-charged to a building as there is no linked building for a global supplier.
    - Charge count of SMS - SMS messages will be charged on the basis of the number of individual messages (per 160 characters).
    - Split Fees mode - All SMS Charges will be recorded against the **Contribution Schedule** even if Split Fees mode is enabled for the building, as there's no option to relate a SMS to a schedule.
    - Fee Schedules run –The new variable charge for SMS messages will be automatically included in the Fee Schedule run, invoices and income reporting.
8) **Ability to waive a SMS charge** – When sending the SMS, an option will be available called 'Exclude from Fee Schedules'. When this is ticked, the building will **not** be charged and it will not appear in the Fee Schedule run, invoices or income reporting.
9) **New user permission to waive SMS charges –** Users will only see the option to 'Exclude from Fee Schedules' when sending a SMS if this permission has been enabled. The permission is enabled by default for system roles of *Administrator* and *Accounts*.

You can view detailed screenshots below.

What you need to do

For clients with the SMS feature enabled, you'll need to do the following.

- *If you want to charge for sent SMS messages*: Set a variable charge for SMS messages from the *Building card>Charges tab>Edit mode>Configure Charges>Charge Schedule screen*.
- Update user permissions to enable or disable the new SMS permission for 'Exclude from Fee Schedules' as needed. The default system roles of *Administrator* and *Accounts* have this permission enabled by default.

GENERAL

10) **Strata roll report** – Changes have been made to make the distinction between the Strata Manager and the Property Manager clearer in the report. The previous section of 'Managing Agent' has been renamed to 'Property Manager', and the strata management company details will be included in a new section called 'Managing Agent' at the top of the report.

11) **Lot custom merge letter jobs** – To improve system performance we've made the below changes.

- When previewing a custom merge letter from the *File>Lots screen* or *Building card>Info>Committee accordion*, the job will now be processed via the background server and shown in the sidebar. If multiple previews are requested in close succession, they will be queued one-by-one and will not start until the previous preview is complete.
- An intermittent error when selecting a large number of owners for a mail merge has now been resolved.

PROPERTYIQ PORTAL

GENERAL

1) **Levies page > Lot ledger** – An intermittent issue has been fixed where the lot's ledger in portal was not being updated once a levy became due and fell past it's due date.

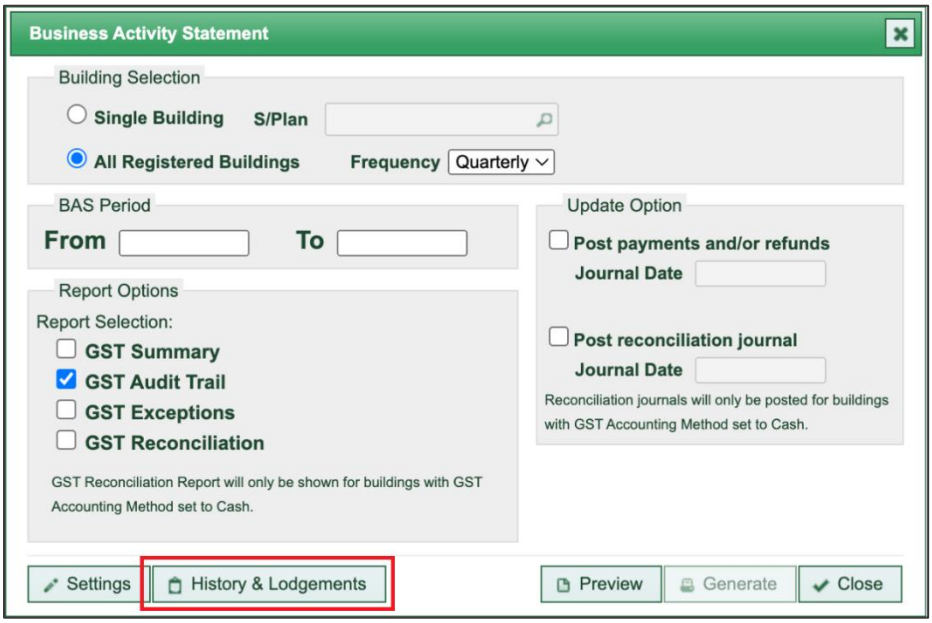
ITEM 1 - BAS HISTORY & LODGEMENTS SCREEN

You can now view and manage your historical BAS records in one place from a new button called 'History & Lodgements' under *End of Period>BAS*.

> ***Note***: BAS history will only be shown from December 2023 release, when BAS snapshots started to be saved.

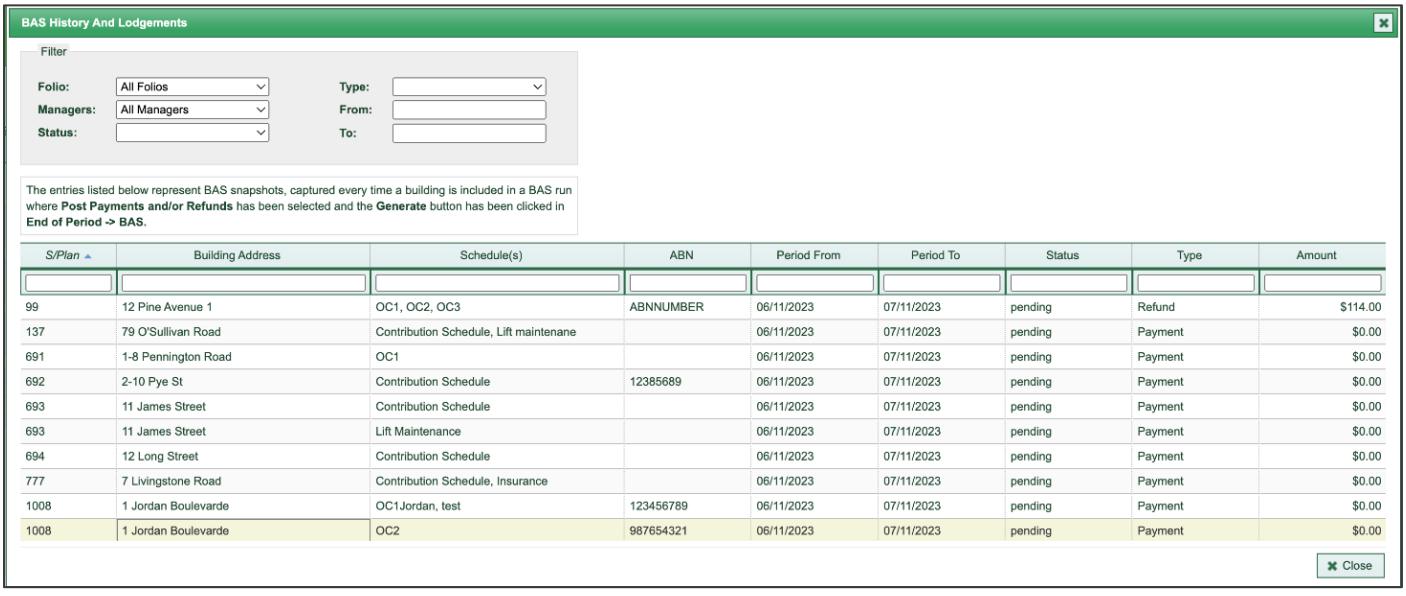
Changes to *End of Period>BAS* screen

- New button called 'History & Lodgements' to view and manage historical BAS records.



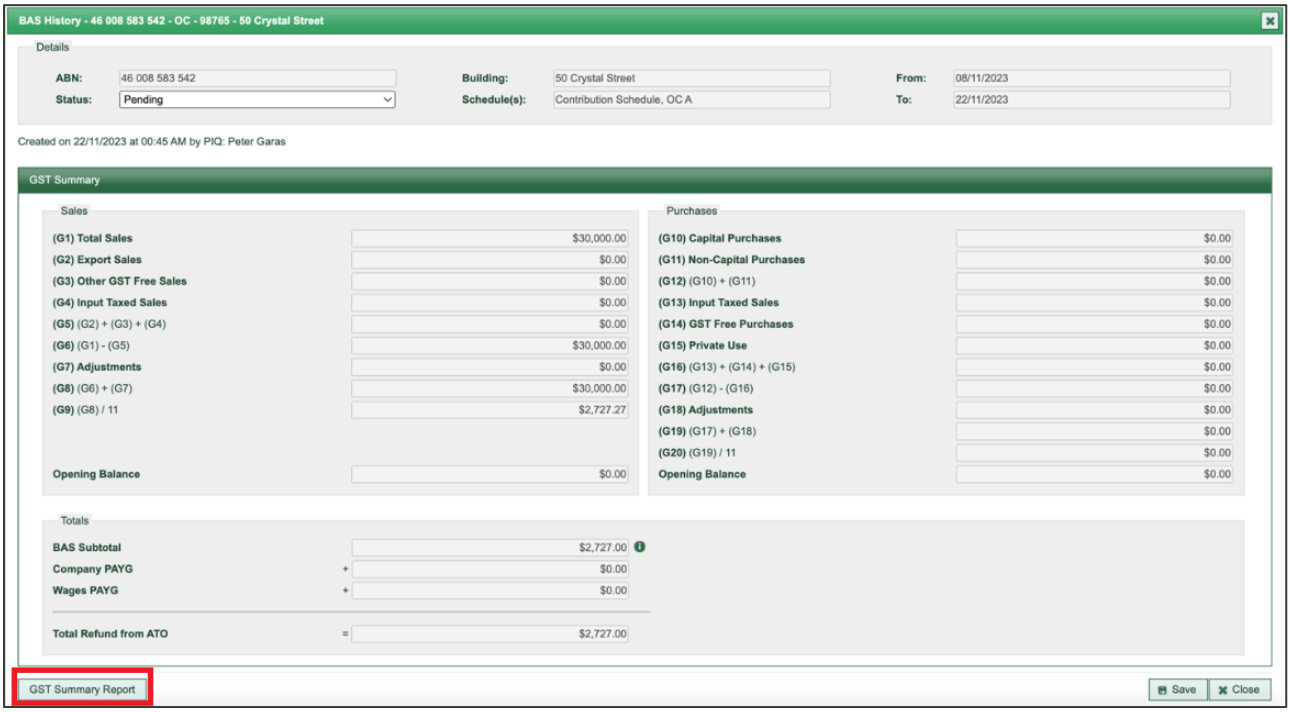
View, sort and filter the list of BAS records

- Sort and filter by Folio, Manager, Period From and To dates, Type (refund or payment), Building, Building address, Schedule, ABN, Amount and Status.



View an individual record in more detail

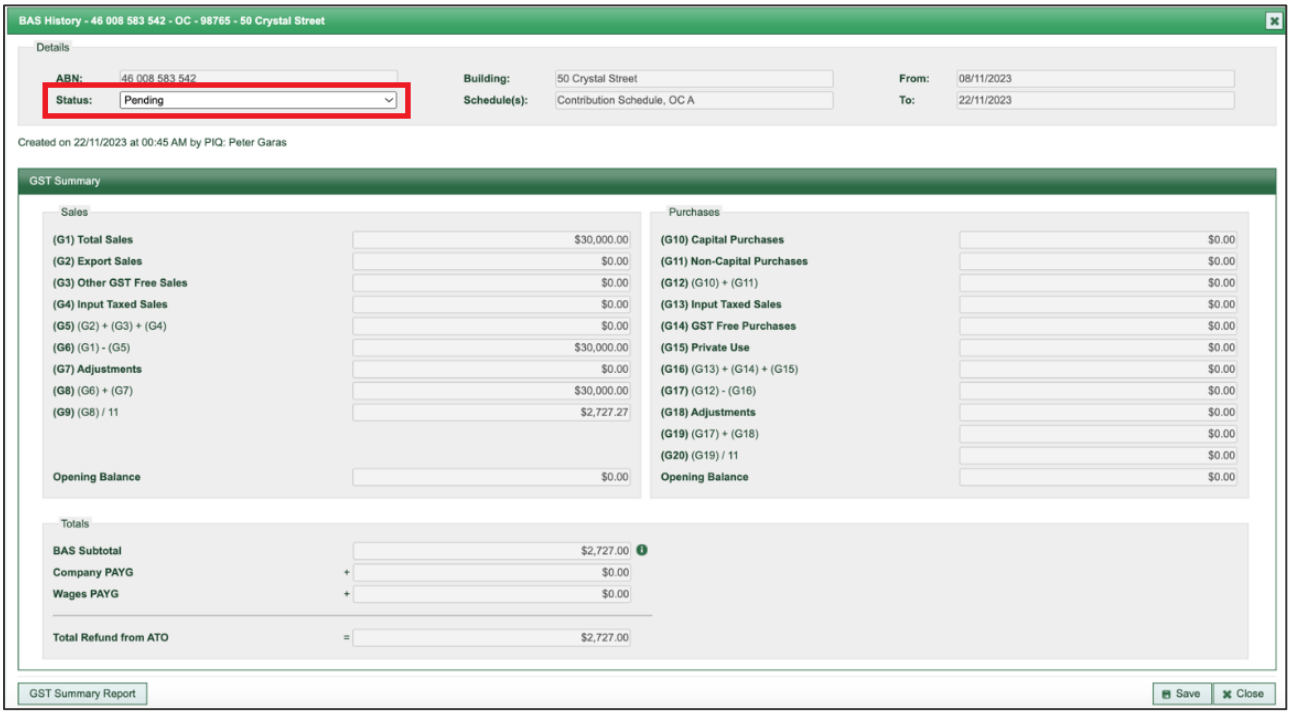
- Double click on a BAS record from the list to open the detailed view.
- Review GST allocations and totals (an on-screen reflection of the GST Summary report).
- Open the PDF GST Summary Report by clicking *GST Summary Report* button.



Update BAS record status

- You can manually update the BAS status from 'Pending' to 'Lodged (Manually)' to identify finalised and lodged BAS reports.

  Note: Once integration with the ATO is completed and BAS can be automatically lodged, it'll introduce a third status.



ITEM 2 – BUILDING INFORMATION ACCORDION (INC STRATAHUB - NSW)

You can now record more information under *Building card>Info tab>Building Information accordion*. Changes to this screen will be reflected in the building's *Log of Changes* tab.

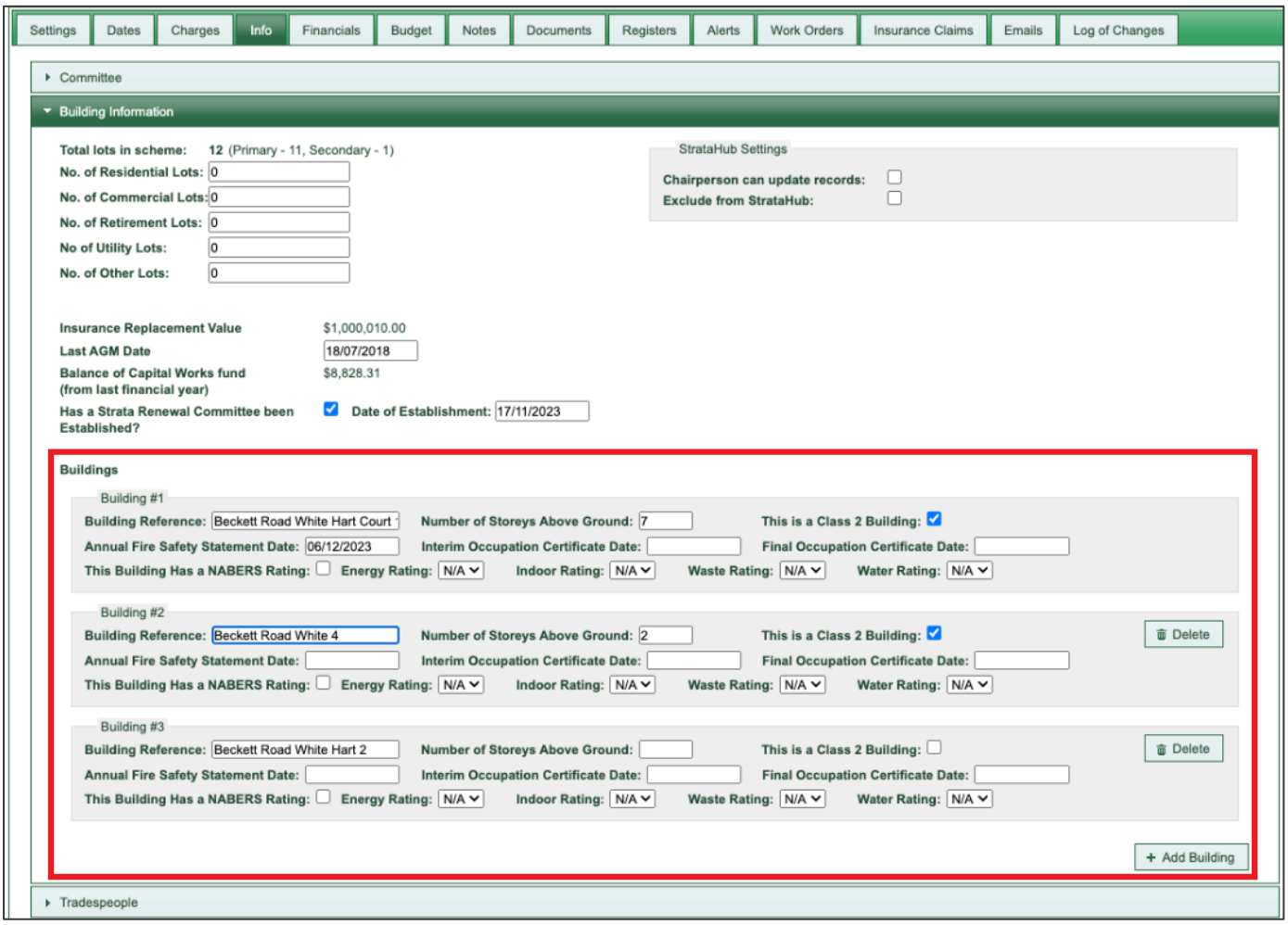
For NSW clients, this includes additional required fields for StrataHub and recording the information for multiple building structures reported under the scheme (strata plan).

NOTE: This change has been specifically made for StrataHub reporting requirements with NSW Government, and is the second phase of changes being released for our upcoming StrataHub integration for NSW clients. This may still be useful to all, it's been made available to all clients in all States. If you have suggestions on what other fields would be useful on the new *Building Information* accordion, please submit your development suggestions to support@propertyiq.com.au.

What you need to do (NSW clients)

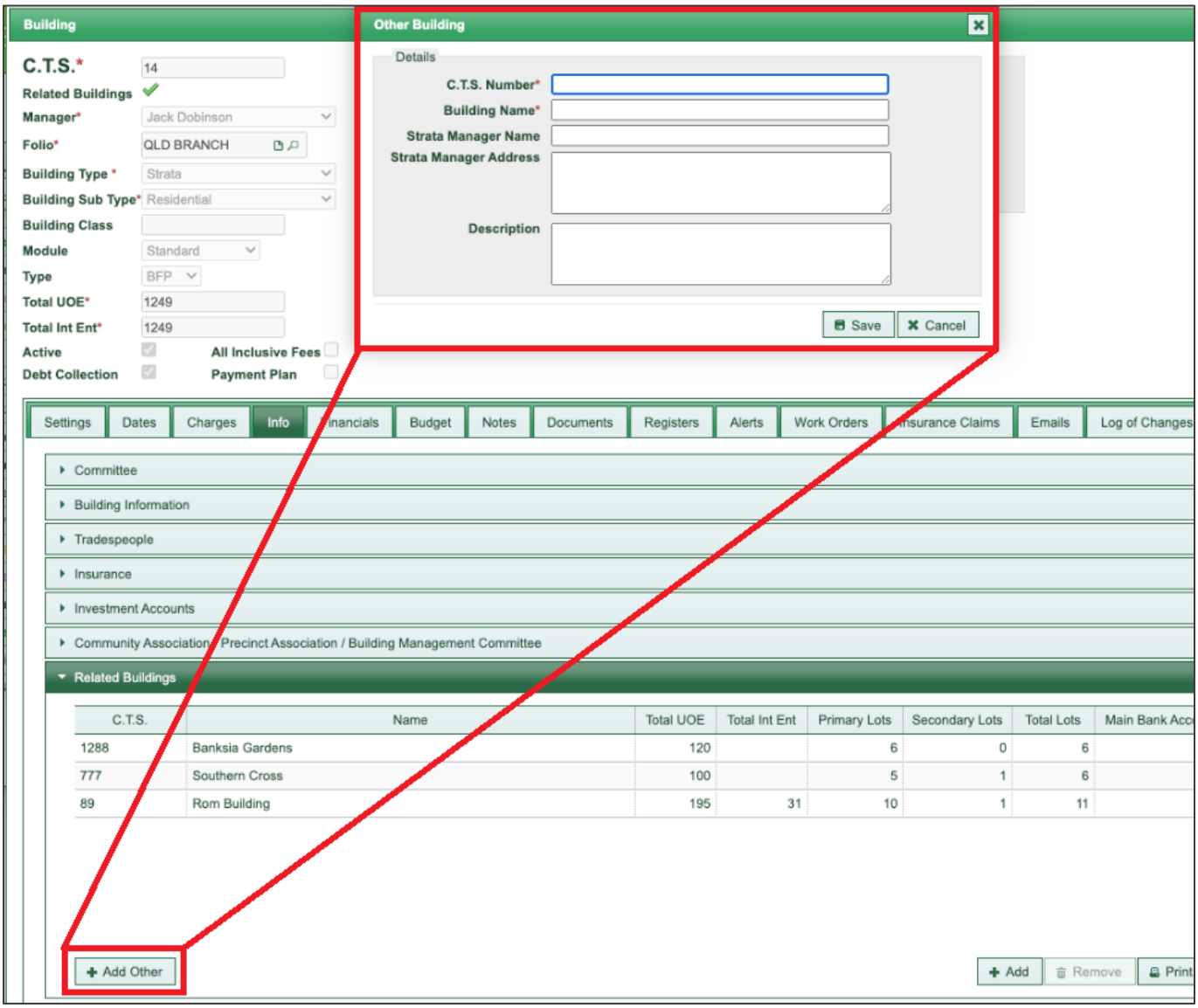
- In preparation for our StrataHub integration, you may like to start entering this information for your buildings at your own pace.
- A new *Contacts* screen is still yet to be released which will also require updating, so you may like to wait until all fields are available.

View and record building information, including multi-buildings (strata plans).



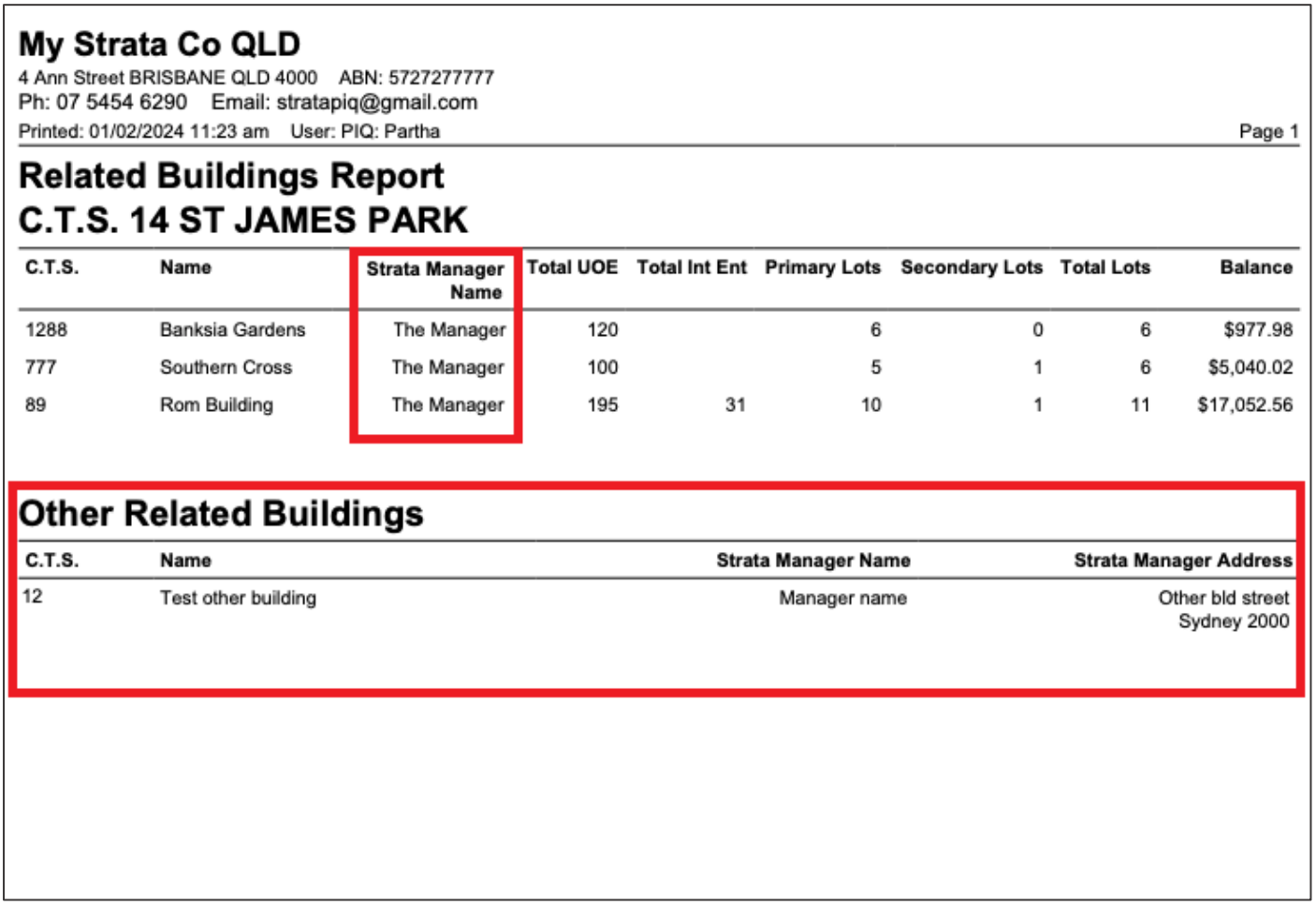
Add related buildings managed by another Strata Manager

You can now manually record a related building that is managed by another Strata Manager under the *Building card>Info>Related Buildings screen* using the *Add Other* button.



Related Buildings report

- Includes strata manager name for the building in a new column.
- Includes new section for 'Other Buildings' and will display any buildings manually added to the *Related Buildings* screen. This section does not appear when no other buildings have been added.



My Strata Co QLD

4 Ann Street BRISBANE QLD 4000 ABN: 5727277777
Ph: 07 5454 6290 Email: stratapiq@gmail.com
Printed: 01/02/2024 11:23 am User: PIQ: Partha Page 1

Related Buildings Report
C.T.S. 14 ST JAMES PARK

C.T.S.	Name	Strata Manager Name	Total UOE	Total Int Ent	Primary Lots	Secondary Lots	Total Lots	Balance
1288	Banksia Gardens	The Manager	120		6	0	6	$977.98
777	Southern Cross	The Manager	100		5	1	6	$5,040.02
89	Rom Building	The Manager	195	31	10	1	11	$17,052.56

Other Related Buildings

C.T.S.	Name	Strata Manager Name	Strata Manager Address
12	Test other building	Manager name	Other bld street Sydney 2000

ITEM 6 – CHANGES FOR COMMUNITY TITLES LEGISLATION (WA)

We've made some improvements to help WA clients manage new Community Titles schemes in PIQ. For more information on community titles, view the WA Government's website.

Getting started

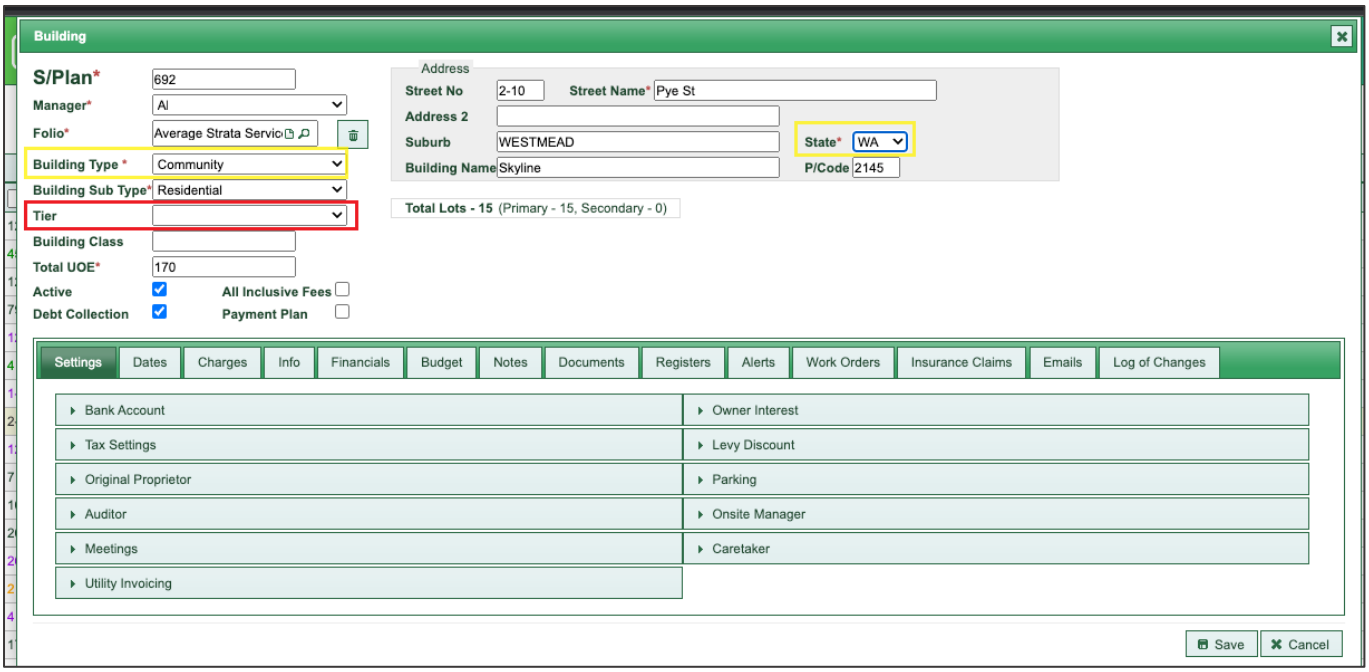
1) You can add each community corporation as a new building in PIQ. Each community corporation in the community scheme should be setup as a separate building, allowing you to have separate councils, budgets, financial reports, lot owners etc.
2) You can classify a community corporation using the existing *Building Type* field on the building card. Select the **building type of 'Community'**.
3) You can record the related community corporations in the *Related Buildings* accordion on each building card (also see changes on Related Buildings). In the Strata Roll Report/Scheme Contacts Register, you must disclose related community corporations (even when they're managed by another strata manager).

System changes for WA building of building type 'Community'

When selecting the building type of 'Community', you'll see the below changes in PIQ.

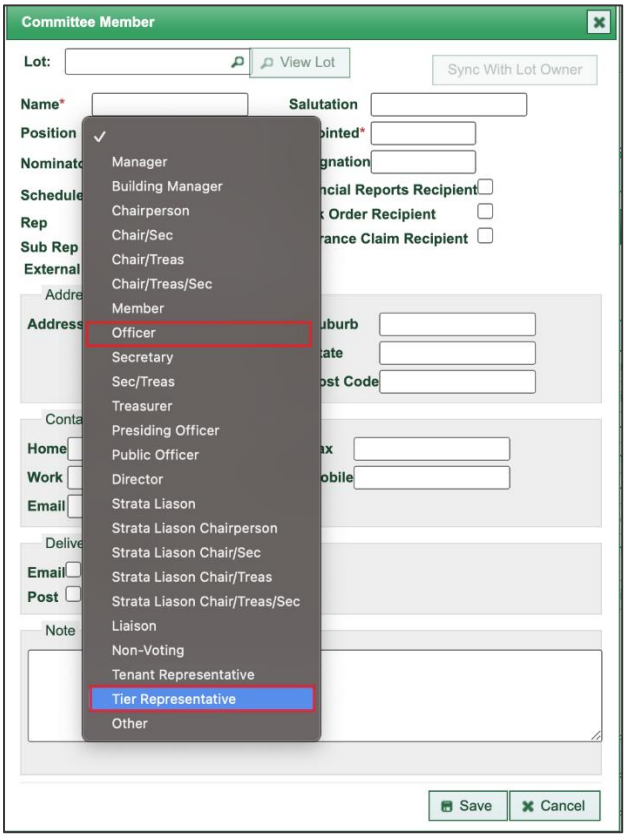
NEW 'TIER' FIELD ON BUILDING CARD

- New 'Tier' field on the building card will have options of Tier 1, Tier 2 and Tier 3.
- It will be blank by default and is not mandatory.



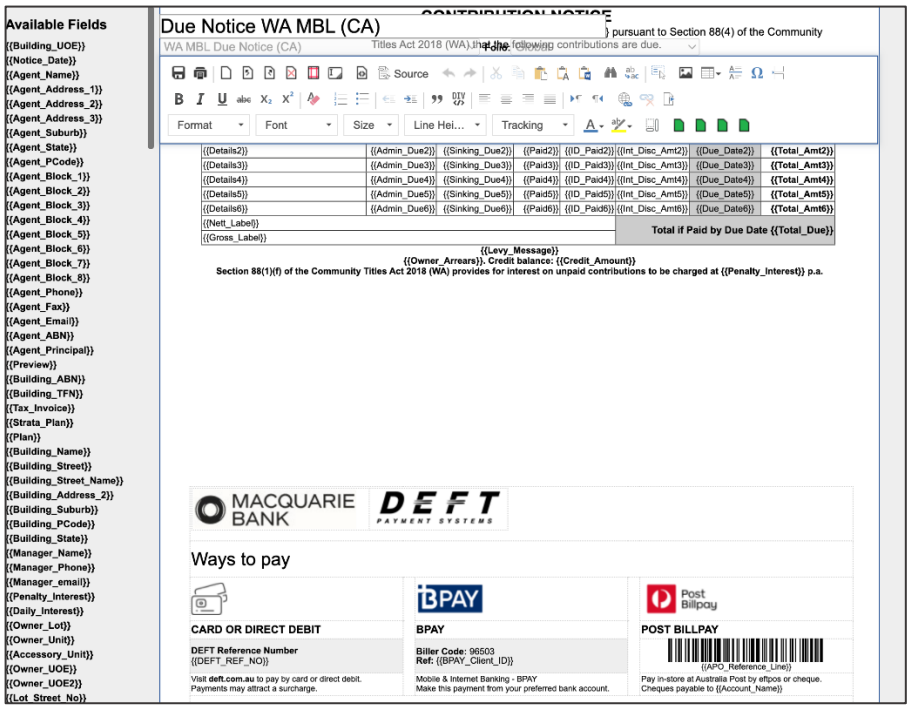
NEW COMMITTEE / COUNCIL POSITIONS

New positions of '**Officer'** and '**Tier Representative**' are available to select from the position dropdown. These will appear in the global list of positions, regardless of building type or State.

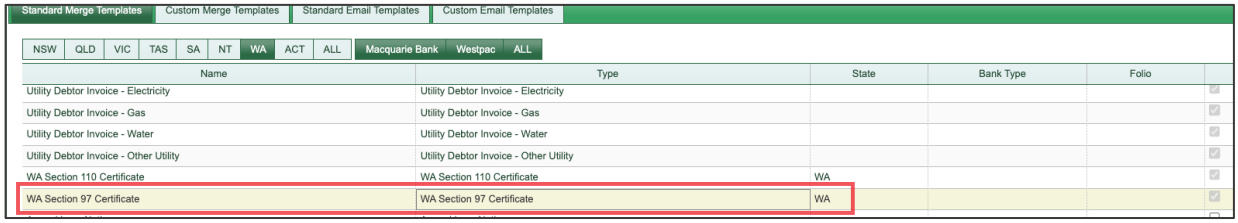


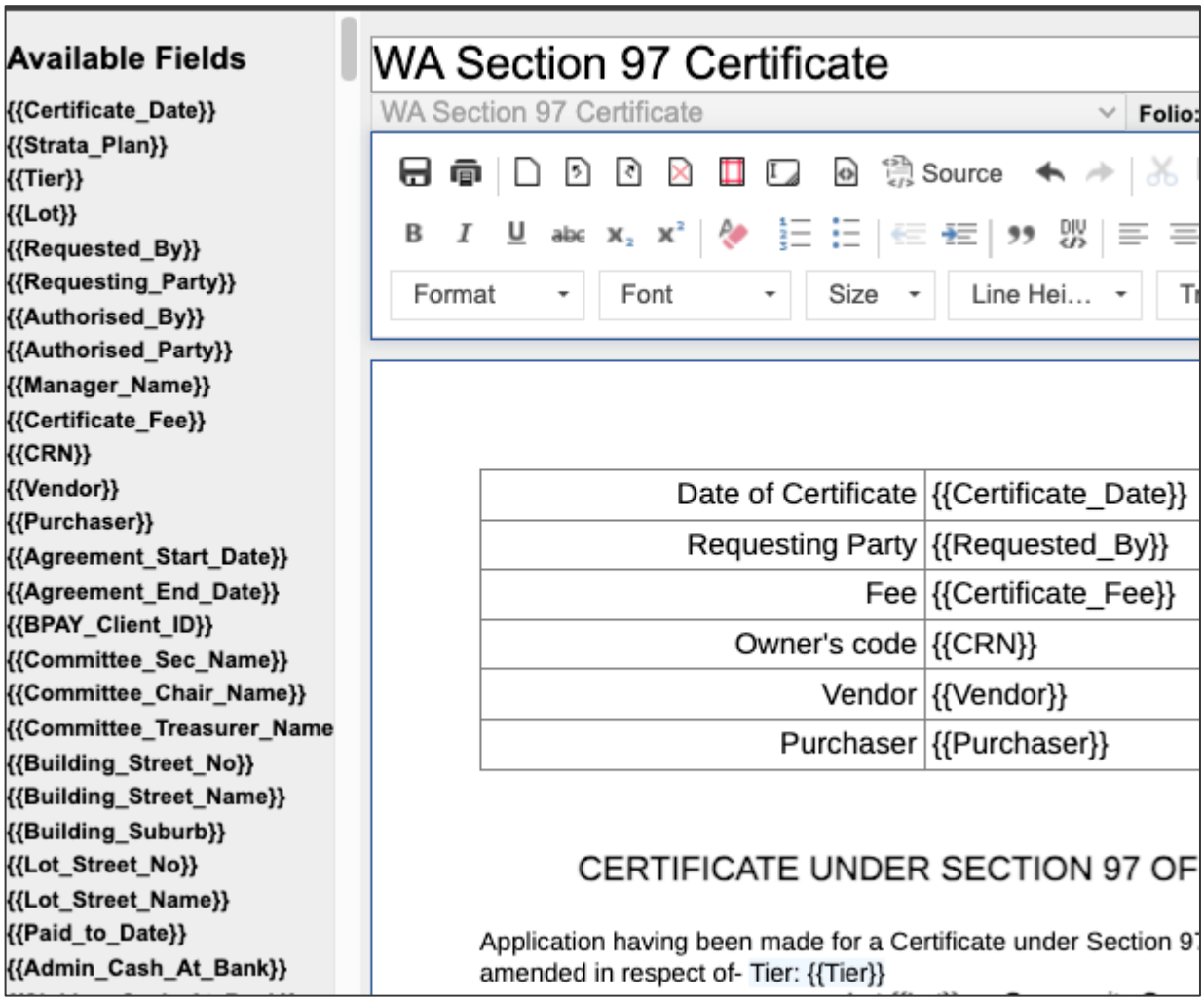
NEW TEMPLATES

- **New due/levy templates** are available for due notices, special notice, arrears notice, final notice and legal notice which references Community Titles legislation.
  The templates used for Community buildings will be appended with (CA). See example below for "WA MBL Due Notice (CA)".



- **New info certificate template** is available under the default list of WA templates called “WA Section 97 Certificate” and will be used when generating certificates for WA buildings of Type ‘Community’.

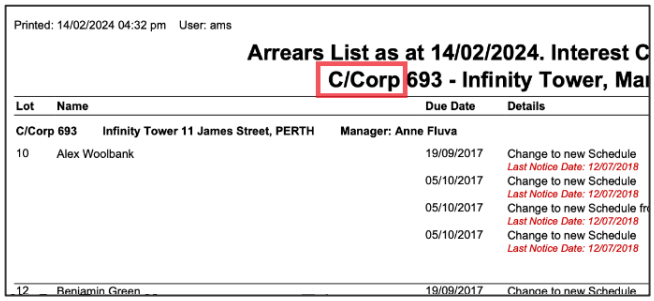




REPORTING CHANGES

- **Report terminology**

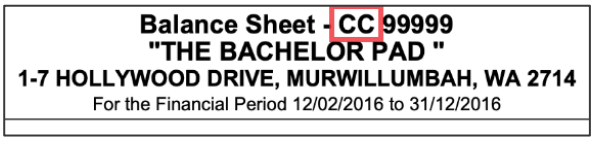
  Reports will use the appropriate terminology in report headers and will display 'Community Corporation', 'C/Corp' or 'CC' depending on the report type.


Printed: 14/02/2024 04:32 pm User: ams

Arrears List as at 14/02/2024. Interest C

C/Corp 693 - Infinity Tower, Ma

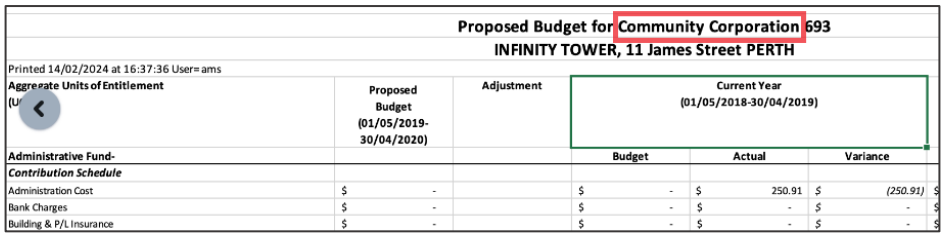
Lot	Name	Due Date	Details
C/Corp 693	Infinity Tower 11 James Street, PERTH	Manager: Anne Fluva	
10	Alex Woolbank	19/09/2017	Change to new Schedule Last Notice Date: 12/07/2018
		05/10/2017	Change to new Schedule Last Notice Date: 12/07/2018
		05/10/2017	Change to new Schedule fr Last Notice Date: 12/07/2018
		05/10/2017	Change to new Schedule Last Notice Date: 12/07/2018
12	Benjamin Green	19/09/2017	Change to new Schedule


Balance Sheet - CC 99999

"THE BACHELOR PAD "

1-7 HOLLYWOOD DRIVE, MURWILLUMBAH, WA 2714

For the Financial Period 12/02/2016 to 31/12/2016


Proposed Budget for Community Corporation 693

INFINITY TOWER, 11 James Street PERTH

Printed 14/02/2024 at 16:37:36 User= ams

Aggregate Units of Entitlement (U	Proposed Budget (01/05/2019-30/04/2020)	Adjustment	Current Year (01/05/2018-30/04/2019)		
Administrative Fund-			Budget	Actual	Variance
Contribution Schedule					
Administration Cost	$ -		$ -	$ 250.91	$ (250.91)
Bank Charges	$ -		$ -	$ -	$ -
Building & P/L Insurance	$ -		$ -	$ -	$ -

- **Strata Roll report renamed to Scheme Contacts Register**

  When generating a Strata Roll report for a WA Community building, the report header will be automatically changed to "Scheme Contacts Register". There have been no other changes to the reporting screen or report; it has simply been renamed to use the correct terminology for a community corporation.

Printed: 14/02/2024 05:19 pm User: ams Page 1

Scheme Contacts Register for Community Corporation Number 99999

The Bachelor Pad

Common Page

C/Corp: 99999 **Tier:**

Building Address: 1-7 Hollywood Drive **Units:** 11 **Lots:** 11

Suburb: MURWILLUMBAH **State:** WA **Post Code:** 2714

Building Name: The Bachelor Pad **ABN:** 123123123

GST: Yes **Manager:** Lea Mac

Managing Agent

Name: My Strata Co demo 1

Full Address: 1 Shelley Street SYDNEY NSW 2000

Phone: 02 1234 5678

Email: propertyiq@macquarie.com

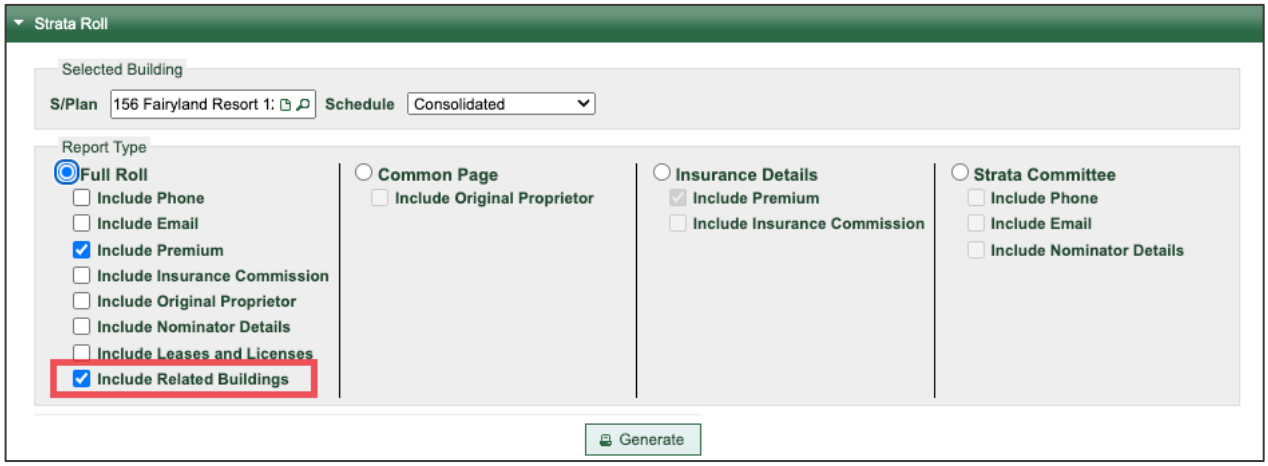
ABN: 72 608 194 707

Registered: **1st Levy Due:** 30/09/2018

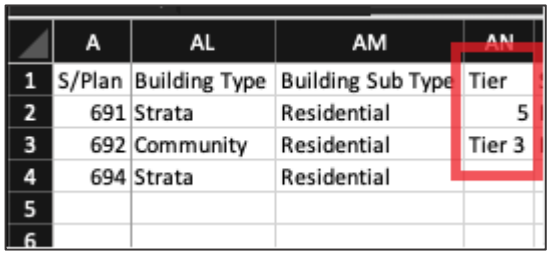
AGM Date: 01/08/2017 **2nd Levy Due:** 31/10/2017

Date Built: **3rd Levy Due:** 31/01/2018

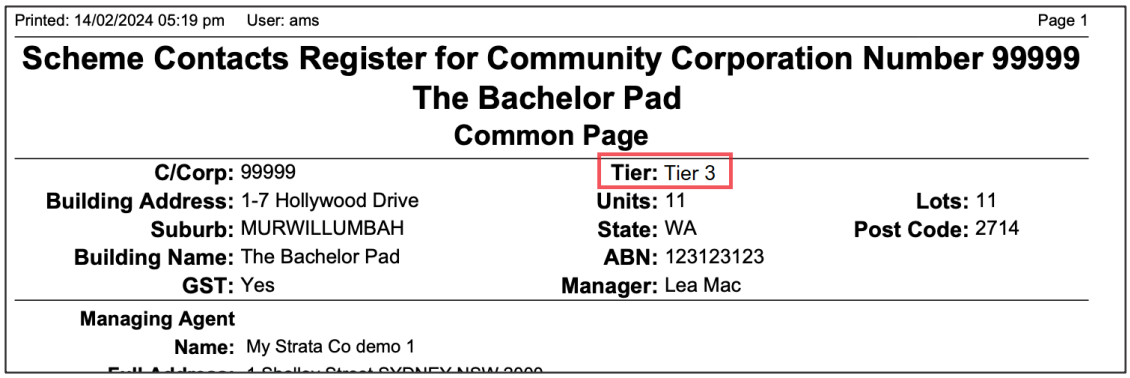
- **Scheme Contacts Register to include Related Buildings Report**
  When selecting a WA Community building in the reporting screen, the checkbox '*Include Related Buildings*' will be ticked by default to ensure disclosure of related community corporations.



- **Tier included in scheme contacts register & building export**
  When generating the scheme contacts register and building report, the Tier of the building/s will be included.

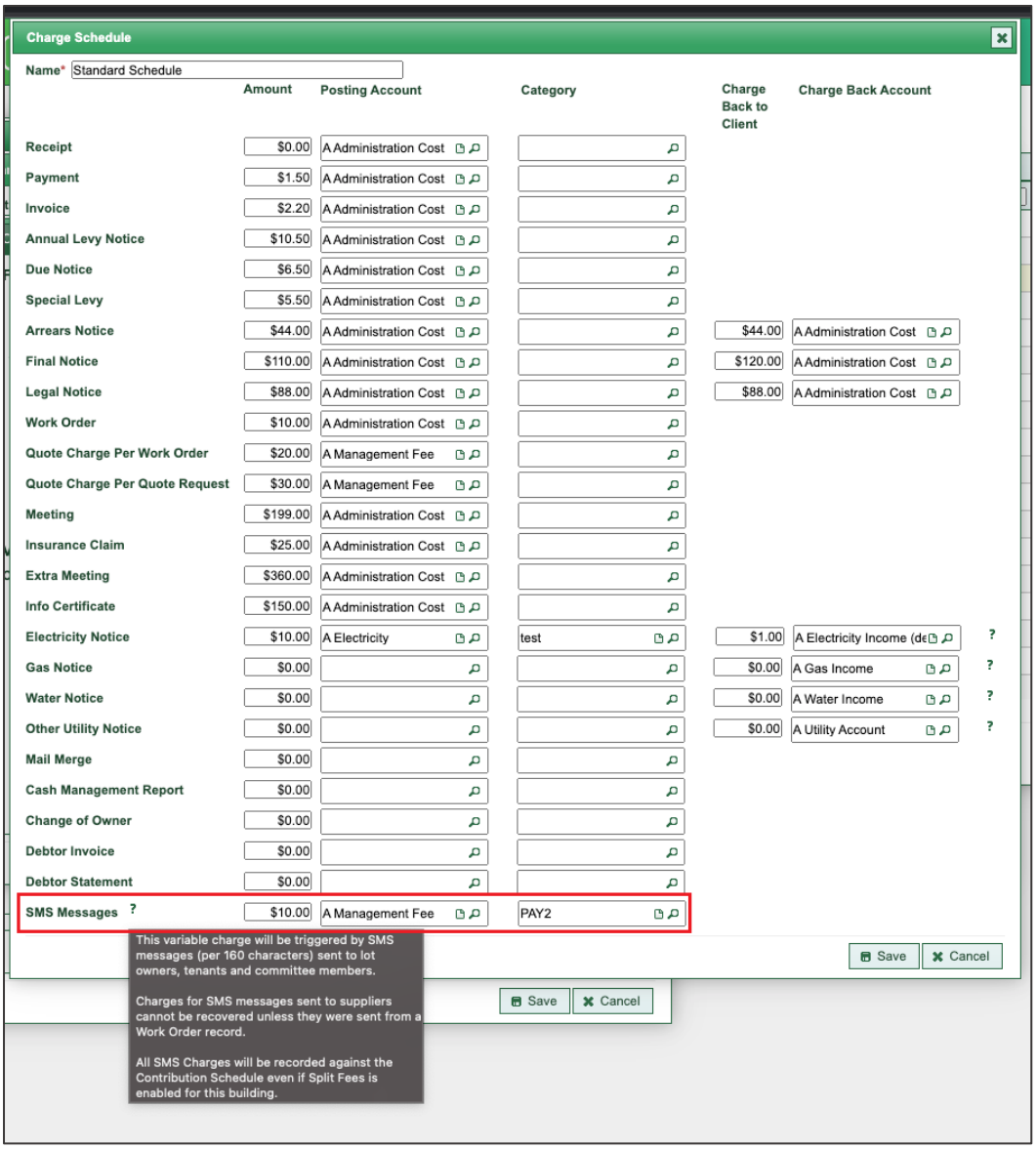


	A	AL	AM	AN
1	S/Plan	Building Type	Building Sub Type	Tier
2	691	Strata	Residential	5
3	692	Community	Residential	Tier 3
4	694	Strata	Residential	
5				
6				



NEW VARIABLE CHARGE FOR SMS

- A new variable charge called 'SMS Message' in the variable charge schedule.
- This new variable charge will be automatically included in the Fee Schedule run, invoices and income reporting.

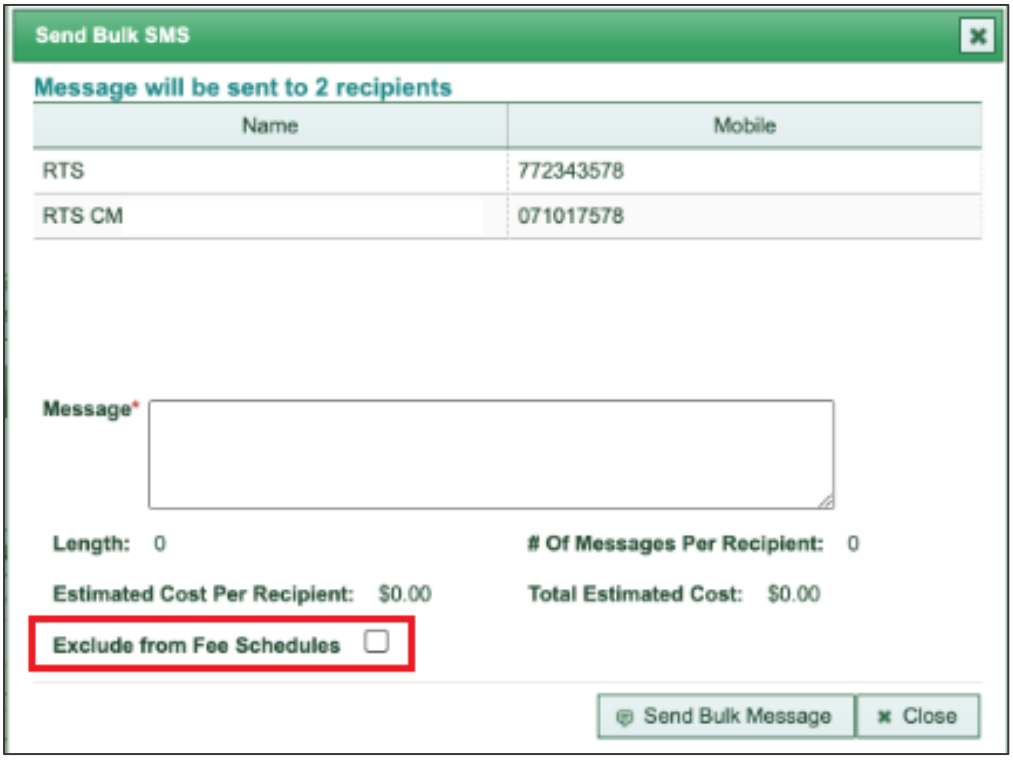


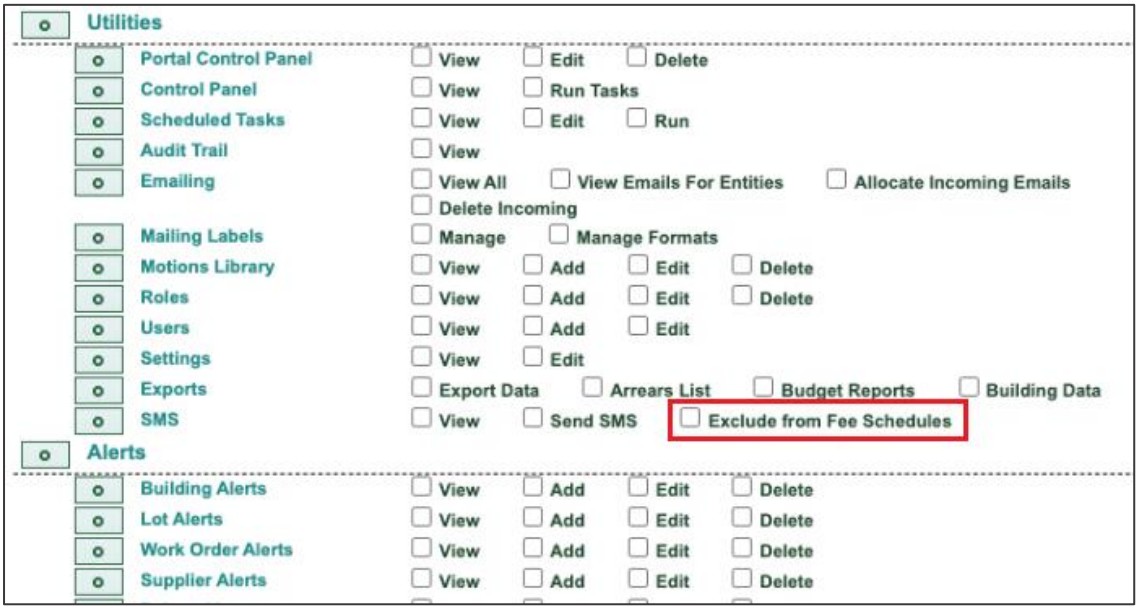
Tax Invoice Summary

Details	Qty	Rate	Charge	GST	Total
Activity Charges:					
Payment Processing (01/05/2018 - 31/05/2018) - OC1	1	$1.50	$1.50	$0.00	$1.50
Invoice Processing (01/05/2018 - 31/05/2018) - OC1	3	$2.20	$6.60	$0.00	$6.60
Annual Levy Notice Processing (01/05/2018 - 31/05/2018) - OC1	3	$10.50	$31.50	$0.00	$31.50
Levy Instalment Notice (01/05/2018 - 31/05/2018) - OC1	2	$6.50	$13.00	$0.00	$13.00
Arrears Notice Processing (01/05/2018 - 31/05/2018) - OC1	1	$44.00	$44.00	$0.00	$44.00
Final Notice Processing (01/05/2018 - 31/05/2018) - OC1	1	$110.00	$110.00	$0.00	$110.00
Legal Notice Processing (01/05/2018 - 31/05/2018) - OC1	1	$88.00	$88.00	$0.00	$88.00
Meeting Processing (01/05/2018 - 31/05/2018) - OC1	1	$199.00	$199.00	$0.00	$199.00
Info Certificate Processing (01/05/2018 - 31/05/2018) - OC1	1	$150.00	$150.00	$0.00	$150.00
SMS Message Processing (01/05/2018 - 31/05/2018) - OC1	2	$11.00	$22.00	$0.00	$22.00
Sub Total	**16**				**$665.60**
Total			**$665.60**	**$0.00**	**$665.60**

ABILITY TO WAIVE A SMS CHARGE

- New option called 'Exclude from Fee Schedules'. When this is ticked, the building will **not** be charged and it will not appear in the Fee Schedule run, invoices or income reporting.
- The user must have the permission to see this option – refer 'New user permission to waive SMS charges' below.



NEW USER PERMISSION TO WAIVE SMS CHARGES

- Users will only see the option to 'Exclude from Fee Schedules' when sending a SMS if this permission has been enabled.
- The permission is enabled by default for system roles of *Administrator* and *Accounts*.