PropertyIQ™

Release Notes

May 2023

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SUMMARY

EMAIL TEMPLATES

1. **Email template merge fields** – New merge fields have been added to the custom email template, allowing you to personalise and customise emails issued from PropertyIQ. The merge fields can be used within the email subject and/or body. See a full list of the merge fields below.

   ! **What you need to do**

   You'll need to manually update your custom email template to include any merge fields of your preference. This can be done easily by editing the email template under *File>Templates>Standard Email Templates screen* and selecting the merge field/s from the list of available fields

   Important note for custom email template

   - The custom email template is used when sending a custom merge letter, and emailing documents from the Documents tab of a building, lot, insurance claim, supplier or debtor.
   - As with all other email templates, there's a standard email subject that's pre-set on the default template. You can also manually enter a custom email subject on the document emailing screen when emailing a document. This email subject field is no longer mandatory and can be left blank.
     - If the email subject on the document emailing screen is left blank, it'll use the default email subject from the template.
     - If a custom email subject is entered on the document emailing screen, the email subject will be populated with the following: [Template email subject] [Custom email subject]

INFO CERTIFICATES

2. **(VIC) OC Certificate – Formatting of new data fields –** In the April 2023 software update, we released five (5) new data fields on the building card for buildings in Victoria, stored under *Building card>Info tab* in a new accordion called "Info Certificate". A small change has been made to ensure any formatting (paragraphs/line breaks) used in these fields is maintained when the data is merged into the corresponding merge fields in the OC Certificate template.

DETAILED

ITEM 1 – EMAIL TEMPLATE MERGE FIELDS

New merge fields have been added to the custom email template, allowing you to personalise and customise emails issued from PropertyIQ. The merge fields can be used within the email subject and/or body. See a full list of the merge fields below.

! What you need to do

You'll need to manually update your custom email template to include any merge fields of your preference. This can be done easily by editing the email template under *File>Templates>Standard Email Templates screen* and selecting the merge field/s from the list of available fields.

Important note for custom email template

- The custom email template is used when sending a custom merge letter, and emailing documents from the Documents tab of a building, lot, insurance claim, supplier or debtor.
- As with all other email templates, there's a standard email subject that's pre-set on the default template. You can also manually enter a custom email subject on the document emailing screen when emailing a document. This email subject field is no longer mandatory and can be left blank.
    - If the email subject on the document emailing screen is left blank, it'll use the default email subject from the template.
    - If a custom email subject is entered on the document emailing screen, the email subject will be populated with the following: [Template email subject] [Custom email subject]

NEW MERGE FIELDS

Merge Field	Data Source / Definition
Agent_Name	Settings -> Company Name (global or folio)
Agent_Principal	Settings -> Principal (global or folio)
Agent_Address_1	Settings -> Address line 1 (global or folio)
Agent_Address_2	Settings -> Address line 2 (global or folio)
Agent_Address_3	Settings -> Address line 3 (global or folio)
Agent_Suburb	Settings -> Suburb (global or folio)
Agent_State	Settings -> State (global or folio). Formatted as uppercase
Agent_PCode	Settings -> P/Code (global or folio)
Agent_Email	Settings -> Email (global or folio)
Agent_Phone	Settings -> Phone (global or folio)
Agent_Fax	Settings -> Fax (global or folio)
Agent_ABN	Settings -> ABN (global or folio)
Strata_Plan	Building -> SP/CTS/OC number. No formatting
Building_Name	Building -> Building Name
Building_Street_No	Building -> Street No
Building_Street_Name	Building -> Street Name
Building_Address_2	Building -> Address 2
Building_Suburb	Building -> Suburb

Building_State	Building -> State
Building_PCode	Building -> Post Code
Building_Manager	Building Manager's Name. See Building -> Manager, User -> Name.
Manager_Email	Building Manager's Email. See User -> Email.
Manager_Phone	Building Manager's Phone #1. See User -> (Ah).
Building_ABN	Building -> Tax Settings -> ABN
QLD_Plan	Building -> Plan (QLD buildings).
QLD_Type	Building -> Type (QLD buildings).
Recipient_Name	▪ Notice to lot owner or lot CM: Lot -> Delivery -> General Correspondence -> Name ▪ Notice to CM (no lot): Committee Member -> Name ▪ Notice to formal tenant (owner occupier): Lot -> Owner Name ▪ Notice to formal tenant (not owner occupier): Lot -> Tenant -> Name ▪ Email to Supplier: Supplier -> Supplier Name ▪ Email to Debtor: Debtor -> Debtor Name
Unit_Owner	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Owner Name ▪ Notice to Committee Member (no linked lot): Committee Member -> Name
Owner_Lot	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Lot number
Owner_Unit	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Unit number
Lot_Street_No	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street No
Lot_Street_Name	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street Name