PropertyIQ™

Release Notes

May 2024

This release includes changes to:

- PropertyIQ
- PropertyIQ Portal

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PROPERTYIQ

BAS

1. **Export BAS report snapshots –** To help you review and track lodgements outside of PropertyIQ, you can now export historical BAS records (one or multiple) from *End of Period>BAS>History and Lodgements* screen using a new export button. See screenshot below.
2. **Exclude inactive schedules in BAS runs** – Some improvements have been made to ensure BAS reports are not generated when they shouldn't be.
    - A Schedule that is GST Registered, is **inactive and reports GST on Self** = Schedule will be excluded from the BAS run.
    - A Schedule that is GST Registered, is either active or inactive, and **reports GST on another Schedule that is inactive** = Both Schedules will be excluded from the BAS run.
    - A Schedule that is GST Registered, is inactive, and **reports GST on another Schedule that is active** = A report for the active Schedule will be generated in the BAS run, and it will include any transactions in that period for the inactive schedule.

    NOTE: For lost managements or record keeping, you'll need to preview/print the relevant BAS report **before** you make the Schedule inactive (this may be more relevant for multi-OCs in VIC).

REPORTING

3. **Deposited Plans (NSW) –** All report headings for NSW buildings of type Community, Neighbourhood and Precinct have been updated to use Deposited Plan terminology. The references of DP, D/Plan and Deposited Plan will be used dependent on the report header format.
4. **Levy Schedule Report (NSW) –** When creating special levies from the *Billing>Special Levies* screen and generating the levy schedule report using the *Print* button, the column heading of Sinking Fund has been updated to Capital Works for NSW buildings.

BUILDING UNITS & GROUP TITLE ACT [BUGTA] (QLD)

5. **New classification on building card (QLD)** – For buildings with State set to QLD, you'll now see a new building type called "Building Units/Group Title" in the dropdown list. You can select this type to classify plans managed under BUGTA.
    - When the building type of *Building Units/Group Title* is selected:
        - the *Module* dropdown is removed as it's not applicable to BUGTA; and
        - the *Type* field is updated to only show the options of "GTP" or "BUP".
    - Building's that have the type Building Units/Group Title selected, will use new system templates and report headings that are specific to BUGTA.
        - See Item 6 below for more information on new system templates.
6. **New system templates for arrears and due notices**
    - You'll see the following new system templates available for QLD:
        - QLD Annual Levy Notice (BUGT)
        - QLD MBL Due Notice (BUGT)
        - QLD MBL Arrears Notice (BUGT)
        - QLD MBL Final Notice (BUGT)
        - QLD MBL Legal Notice (BUGT)

- QLD MBL Special Notice (BUGT)
- These templates will be used for any building that is of type **Building Units/Group Title**.

NOTE: A future release will also include a new Section 40 Certificate and changes to report heading terminology for BUGTA buildings.

SMS

7. **Export SMS Messages** – You can now export all SMS messages (and all details) from the global SMS log under *Utilities>SMS Messages*. It'll be processed as a background server job, with the export file available to download from the side task bar. See screenshot below.
8. **Improved viewing of SMS Messages** – Improvements have been made to the SMS tabs in the Lots, Committee, Suppliers and Work Order cards, including:
    - Date filter – You can now filter SMS in the list using *From* and *To* dates.
    - Status filter – You can now filter SMS using status buttons. Options are *All, Sent, Error*. *Sent* is selected by default.
    - View detailed message – You can now double click (or highlight and click *View*) a message to open a detailed view and see the full message, including any error messages.

    See screenshots below.
9. **View SMS Message > Exclusion from fee schedule** – When viewing an individual SMS message from the Lots, Committee, Suppliers, Work Orders or Global SMS screens, you'll now be able to see if the charge was waived for a SMS message when it was sent. If the checkbox 'Exclude from Fee Schedule' is ticked, then the charge was waived, and it'll be excluded from the Fee Schedule run. NOTE: This is a read only field and it cannot be edited.

SMS is an optional feature that must be enabled by PropertyIQ. If you'd like to enable this feature or would like to know more, email us at support@propertyiq.com.au.

INCOMING EMAILS

10. **Incoming Emails > Save attachments to Documents** - For clients who have the Incoming Email feature enabled, you can now view, edit details, and save an email attachment to documents directly from the email under *Utilities>Emailing>Incoming Emails* screen. See screenshot below.

    NOTE: A future release will include the automatic filing of attachments to documents as part of the *Allocate* process (saving an incoming email to a Building/Lot/Supplier/Debtor).

    For more information on the Incoming Emails feature, view our Incoming and Outgoing Emails help page or manual.

11. **Settings > Incoming Email Types** – Changes have been made to the layout of the settings under *Utilities>Settings>Application Settings>Incoming Email Types* to improve the user experience. When creating or editing an incoming email type, the checkbox 'Automatically Save to Documents' has been moved above the dropdown option for 'Document Type for Attachments'. Only when you've ticked the checkbox to automatically save attachments to documents, will the dropdown be enabled to choose the document type you want to save them to.

12. **Preview 1st Letter of custom merge letter job** – To save time, you can now preview the first letter only when generating custom merge letters under *File>Lots* screen. From the custom template merge generation screen, there's a new button called 'Preview 1st Letter'.
13. **Utility levies > Rounding** – When generating utility levies under *Billing>Utility Levies*, there was an issue where the individual charge items weren't adding up to the Total charge on the utility levies screen and the PDF invoice (often out by $0.01).
    - This issue has been fixed by ensuring all input fields on the utility levies screen are using common rounding rules and will round to 2 decimal places e.g. a calculated usage charge of $10.114 will use $10.11 when adding up the total. This means that the utility levies screen (all individual items and the total) will match the generated PDF invoice in all cases.
    - To avoid any confusion, a disclaimer has also been added to the bottom of the screen that states "There may be differences in calculated amounts due to rounding to nearest $0.01.".
14. **Debtor Statements** – When generating a debtor statement under *Billing>Due Notices>Debtors*, there was an issue with the merge field "Details" incorrectly merging the invoice message details instead of the line-item details of the invoice. Now, when generating debtor statements, the details of each outstanding debtor invoice will display the line-item details of the invoice. If there are multiple line items in an invoice, it will combine them into one, separating them by a period, to a maximum of 100 characters.
15. **Lot Import** – When importing lots under *File>Lots>Import*, there was an issue with the fields 'Last Settled', 'Tenant Least Start' and 'Lease Expiry' when they were left blank and resulted in the Lot being blocked from import due to incorrect date format of DD/MM/YYYY. Now, you'll still be able to proceed with importing the Lot when these fields are left blank.
16. **Check for Missing Levies function** – An issue has been fixed where clicking the *Check for Missing Levies* button on *Billing>Due Notices>Lots screen* when a date range wasn't entered would cause an error. To avoid any errors or confusion, the *Check for Missing Levies* button will now only be enabled when the checkbox option '*Generate Due Notices'* is ticked AND a To Date has been entered.
17. **Meetings > Generating data source** – When generating a data source for a meeting under *To Do>Meetings>Meeting card*, the *Generate Data Source* button will be temporarily disabled while the download is in progress. This'll indicate that the job is in progress and avoids it being clicked on multiple times which was resulting in an error.
18. **Security > Users list > Login name column** – To help you view, search and filter by a user's login name or login email, you'll see a new column on the Users screen under *Utilities>Security*. This may help you tidy up and audit the log in details of each user, and make sure each user's log in email is unique ahead of PIQ+ adoption.
    - For clients enabled for early adoption of PIQ+ - This column is called "Login Email" as PIQ+ and Single Sign On (SSO) requires an email when logging into PIQ.
    - For all other clients – This column is called "Login Name". Once you've enabled PIQ+, the column will be updated to Login Email as above.
19. **Setting for double-sided printing > Help tip** – Under *Utilities>Settings>Application Settings* screen, we've added a hover over help tip next to the setting for 'Enable double-sided printing' that explains what this setting does.

    The help tip states: "If this is selected, padding between recipient notices will be added in PDF files generated for manual printing. This ensures the last page of one notice isn't printed on the first page

of the next notice when printing double-sided. This applies to due/special/utility notices, arrears/final/legal notices, meeting notices/minutes, mail merge letters, utility debtor invoices, and debtor statements."

PROPERTYIQ PORTAL

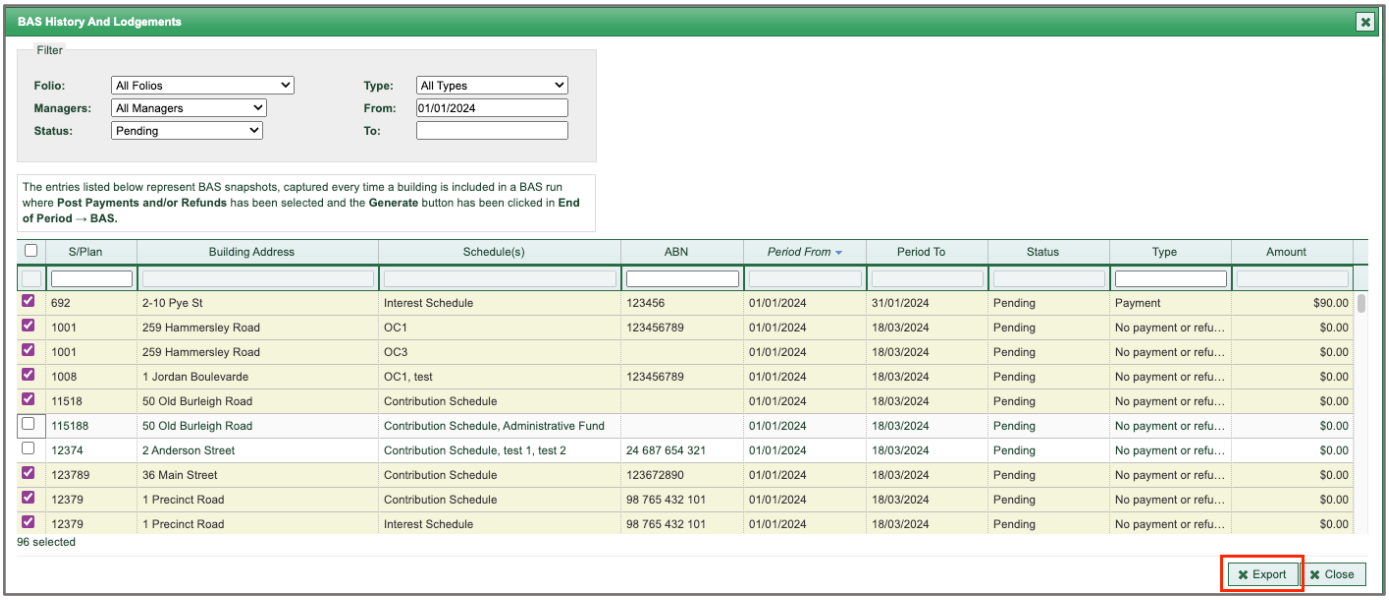
GENERAL

We've made some general changes to improve the user experience, including:

1. **Navigation > Settings menu** – To make it easier to find and manage settings for notifications and change of password, the Settings menu has been moved from within the Profile menu dropdown and will now be visible in the main navigation list with Financial, Levies, Documents and Meetings pages.
2. **Notification emails** – To remind lot owners and committee members that they can set/manage their notification preferences, all notification emails now include the text "To stop receiving this email, update your notification preferences in portal settings." at the bottom of the email.
3. **In-portal notifications** – The number of unread notifications will now show on the bell icon at the top of the page. Once a notification is clicked on in the notifications panel, that notification will be marked as read.
4. **Email validation** – For a smoother login and password reset experience, email validation on the login, forgot password and password reset screens has been improved to ensure it recognises whether the text I am currently typing is in the correct email format.
5. **Checkboxes and hyperlinks** – We've updated the sizing and colour of some checkboxes and hyperlinks for consistency across different screens.
6. **Cursor types** – When hovering over different screens and areas in PIQ Portal, the cursor type will now properly convey the actions that are available (click, type etc). For non-clickable areas, you'll see the default mouse cursor (an arrow). For clickable areas, you'll see a hand icon. For areas you can enter or select text, you'll see a text cursor.
7. **Improved alignment of text and spacing** – We've fixed some alignment issues on the Home (My Lots) and Documents pages to ensure consistency and responsiveness when viewing the portal in computer or mobile versions.

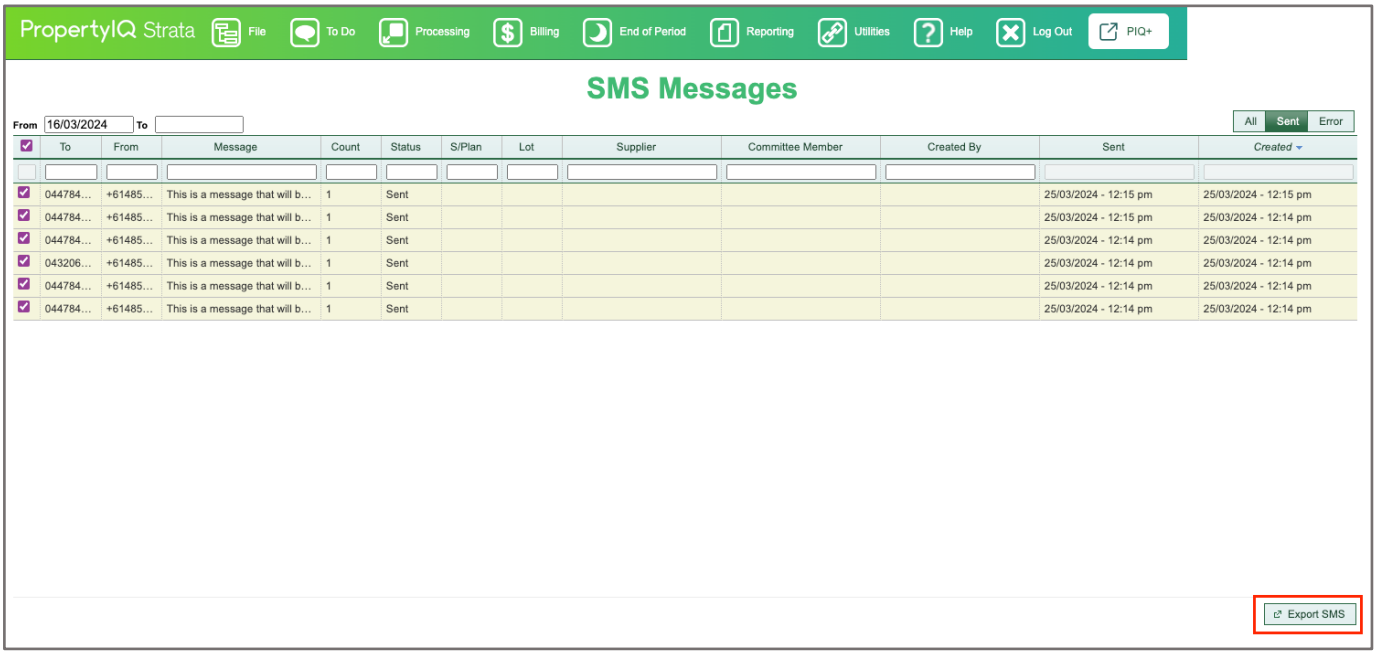
ITEM 1 - EXPORT BAS REPORT SNAPSHOTS

To help you review and track lodgements outside of PropertyIQ, you can now export historical BAS records (one or multiple) from *End of Period>BAS>History and Lodgements* screen using a new export button.



ITEM 7 – SMS MESSAGES - EXPORT

You can now export all SMS messages (and all details) from the global SMS log under *Utilities>SMS Messages*. It'll be processed as a background server job, with the export file available to download from the side task bar.

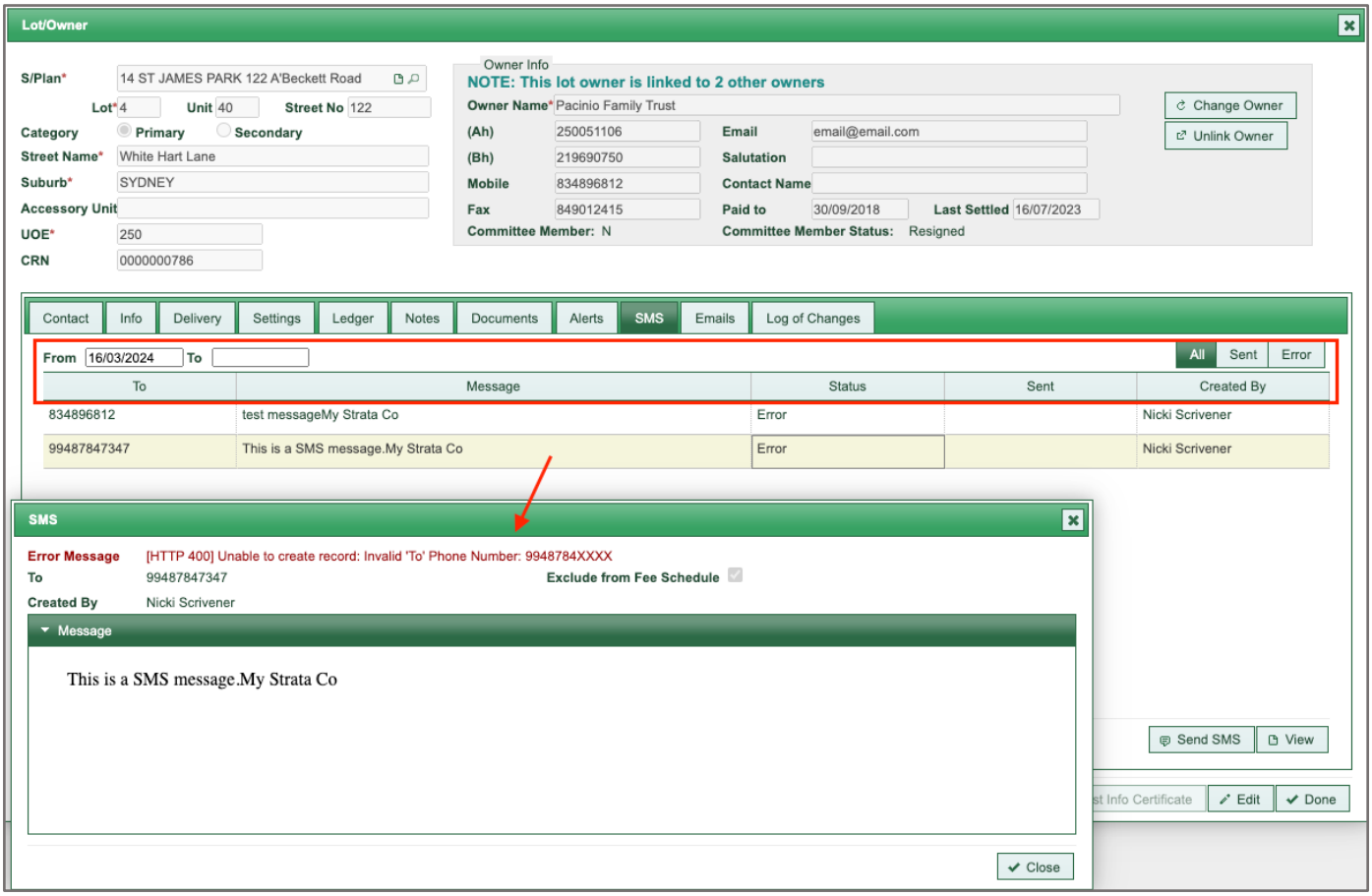


ITEM 8 – SMS MESSAGES – FILTERS & DETAILED VIEW

Improved filtering and viewing of SMS messages from the SMS tab in the Lots, Committee, Suppliers and Work Order cards.

- **Date filter** – You can now filter SMS in the list using *From* and *To* dates.
- **Status filter** – You can now filter SMS using status buttons. Options are *All*, *Sent*, *Error*. *Sent* is selected by default.
- **View detailed message** – You can now double click (or highlight and click *View*) a message to open a detailed view and see the full message, including any error messages.
- **View if excluded from fee schedules** – If the checkbox 'Exclude from Fee Schedule' is ticked, then the charge was waived, and it'll be excluded from the Fee Schedule run. This is a read only field and it cannot be edited.

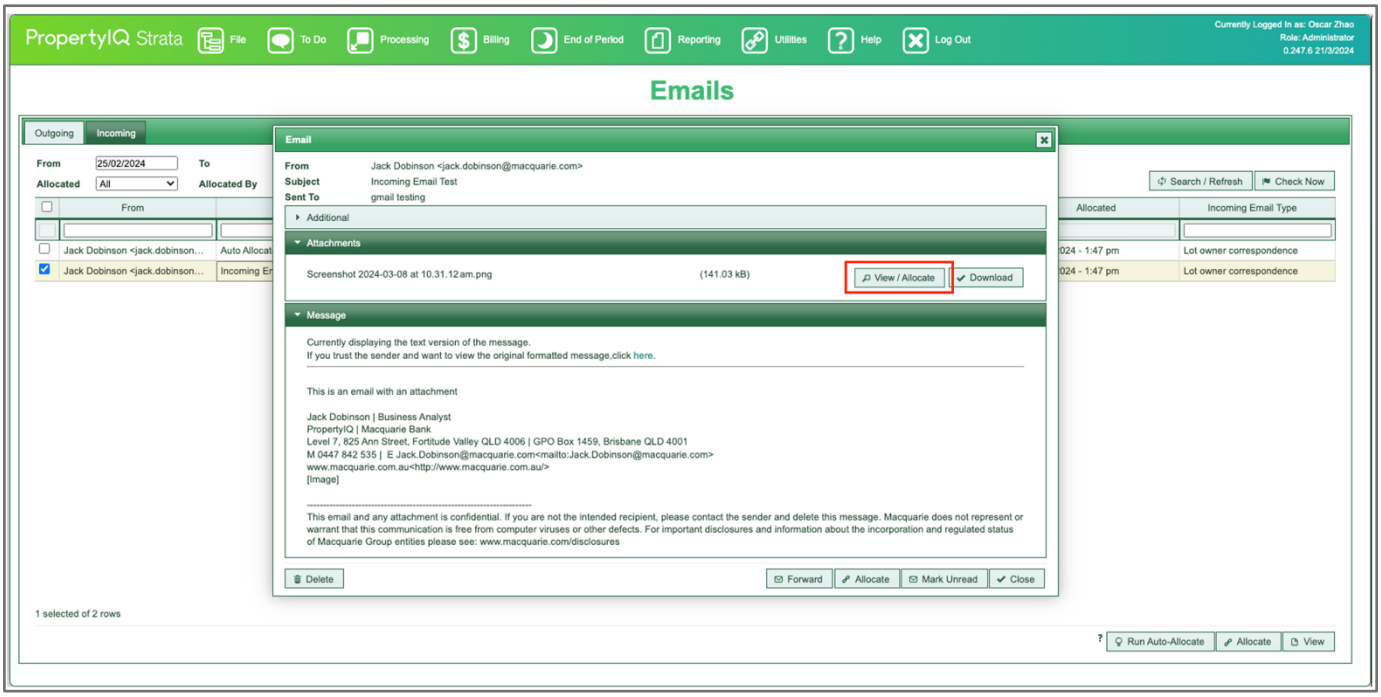
SMS is an optional feature that must be enabled by PropertyIQ. If you'd like to enable this feature or would like to know more, email us at support@propertyiq.com.au.



ITEM 10 - INCOMING EMAILS - SAVE ATTACHMENTS TO DOCUMENTS

For clients who have the Incoming Email feature enabled, under *Utilities>Emailing>Incoming Emails* screen

- You can view, edit details, and save an email attachment to documents directly from the email using the *View/Allocate* button next to the attachment.
- This will open the Document Entry screen where you can preview the document and edit it's properties, including where this document is saved in PIQ e.g. S/Plan number, document name, document type, Lot, Supplier, Debtor and comments.



NOTE: A future release will include the **automatic** filing of attachments to documents as part of the *Allocate* process (saving an incoming email to a Building/Lot/Supplier/Debtor).

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