PropertyIQ™

Release Notes

November 2024

This release includes changes to:

- PropertyIQ
- PropertyIQ Portal

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IMPROVEMENTS FOR LEGISLATION CHANGES (AUSTRALIAN CAPITAL TERRITORY)

1. **Changes to ACT Section 119 Certificates**
    - Existing 'ACT Section 119 Certificate' has been renamed to 'ACT Section 119 **Sales** Certificate' and will now use the document name "section-119-act-sales.pdf" when it's generated and saved to Lot documents.
    - A new certificate is now available called 'ACT Section 119 **Rental** Certificate' and will use the document name "section-119-act-rental.pdf" when it's saved and generated to Lot documents. It's available and already enabled in your default list of templates under *File> Templates> Standard Merge Templates> ACT*. You can view and customise it there.

2. **Select certificate type during generation –** When generating a certificate for a lot in an ACT building, you can now choose between generating a **Sales** certificate or a **Rental** certificate.

    Sales certificate is selected by default. And when selecting a Rental certificate, you'll see additional options to enter a *Certificate Expiry* date (defaulted to 5 years from today's date) and *Requested By* name (free text field, blank by default).

    See below for detailed screenshots.

3. **New data fields for ACT building –** You can now record important information on an ACT building under *Info tab>Info Certificates accordion* about swimming pool, embedded network utilities and ceiling insulation. This information must be disclosed in the new Rental Certificate, so you can enter the information here and it will pre-populate into your certificate.

    This is in addition to several new generic fields available on the Info Certificates accordion (refer below 'Item 5 - New data fields on building card').

    - Swimming pool: You can select *Yes* or *No* to "Is there a regulated swimming pool?". The dropdown is blank by default and not mandatory.
    - Embedded network utilities: You can select *Yes* or *No* to whether there's an embedded network for Electricity, Hot Water and Internet/Data. The three dropdowns are blank by default and not mandatory.
    - Ceiling insulation: You can select *Yes* or *No* to "Are all lots exempt from complying with minimum insulation standards?". The dropdown is blank by default and not mandatory.
        - When selecting *No*, an additional section will appear and you can select the Lots that must comply with the standards and tick whether they are compliant. You can view, add and remove lots from this section as required.

    Any changes made to these fields are recorded in the building's log of changes.

    See below for a detailed screenshot.

4. **New merge fields for Sales and Rental Certificates** – Several new merge fields are available in both the Sales and Rental Certificates to display information in the certificates that's been recorded in the new building fields (refer Item 3 above).

    The following fields are available in the merge field library for both the Sales and Rental certificate templates, and can be added and removed as required.

- **{{Swimming_Pool}}** – Populates with either *Yes*, *No* or *[Blank]* depending on the 'Swimming Pool' field under Building card>Info>Info Certificates accordion.
- **{{Embedded_Electricity}}** – Populates with either *Yes*, *No* or *[Blank]* depending on the 'Embedded Network Utilities> Electricity' field under Building card>Info>Info Certificates accordion.
- **{{Embedded_Water}}** – Populates with either *Yes*, *No* or *[Blank]* depending on the 'Embedded Network Utilities> Hot Water' field under Building card>Info>Info Certificates accordion.
- **{{Embedded_Internet}}** – Populates with either *Yes*, *No* or *[Blank]* depending on the 'Embedded Network Utilities> Internet/Data field' under Building card>Info>Info Certificates accordion.
- **{{Insulation_Exempt}}** – Populates with either *Yes*, *No* or *[Blank]* depending on the 'Are all lots exempt...?' field and the 'Lots that must comply' section under Building card>Info>Info Certificates accordion.
    - If 'Are all lots exempt...?' is [blank] **=** merge field will show blank.
    - If 'Are all lots exempt...?' is Yes **=** merge field will show Yes.
    - If 'Are all lots exempt...?' is No AND the Lot **is not** listed in the 'Lots that must comply' section **=** merge field will show Yes.
    - If 'Are all lots exempt...?' is No AND the Lot **is** listed in the 'Lots that must comply' section **=** merge field will show No.
- **{{Insulation_Min_Standards}}** (if lot is not exempt, does it comply?) – Populates with either *Yes*, *No* or *[Blank]* depending on the '{{Insulation_Exempt}} merge field' and the 'Lots that must comply' section under Building card>Info>Info Certificates accordion.
    - If {{Insulation_Exempt}} is [blank] = this merge field also shows blank.
    - If {{Insulation_Exempt}} is Yes = this merge field shows blank.
    - If {{Insulation_Exempt}} is No AND the Lot **is not** listed in the 'Lots that must comply' section = this merge field shows blank.
    - If 'Are all lots exempt...?' is No AND the Lot **is** listed in the 'Lots that must comply' section AND the 'Compliant' checkbox is **unticked** = merge field will show No.
    - If 'Are all lots exempt...?' is No AND the Lot **is** listed in the 'Lots that must comply' section AND the 'Compliant' checkbox is **ticked** = merge field will show Yes.

In addition to the above fields, the following fields are also available in the Rental certificate template:

- {{Certificate_Expiry}} – Populates with *Certificate Expiry* date on the generation screen.
- {{Requestor}} – Populates with text entered in *Requested By* field on the generation screen.

What you need to do to (ACT Legislation changes, Items 1-4)

1. Update your existing default template for *Section 119 Sales Certificate* and change any references and headings within the document to 'Sales Certificate'.
2. Review your new default template for *Section 119 Rental Certificate* and personalise or customise as required.
3. Review and update the new data fields under *Building card>Info tab>Info Certificates accordion* for your relevant buildings. This will ensure any important information is automatically merged into your certificates.

5. **New data fields on building card** – To improve efficiency and better assist clients with their disclosure requirements, six (6) new data fields on the building card have been added for buildings in all States (this was pre-existing for Victorian buildings).

   Each data field has a new corresponding merge field that can be inserted into your certificate template and will allow this information to be pre-filled for each certificate generated.

   - New accordion under *Building card>Info tab* called "Info Certificates" where you can record information that needs to be disclosed on all certificates.
   - New data fields available under *Building card>Info tab>Info Certificates accordion*. Each field is blank by default and has a character limit of 800 characters.
     - **Repairs & Maintenance** – Here you can record details of any repairs, maintenance or other work that has been or is about to be performed that may incur additional charges. Any information entered here will be shown in the new merge field {{&Building_Repairs}} in the certificate template.
     - **Liabilities** - Here you can record details of any liabilities and contingent liabilities of the building. Any information entered here will be shown in the new merge field {{&Building_Liabilities}} in the certificate template.
     - **Leases & Licenses** – Here you can record details of any leases and licenses over common property or lots. Any information entered here will be shown in the new merge field {{&Building_Leases_Licenses}} in the certificate template.
     - **Notices & Orders** - Here you can record details of any notices or orders served on the building. Any information entered here will be shown in the new merge field {{&Building_Orders}} in the certificate template.
     - **Legal Proceedings** - Here you can record details of any legal proceedings to which the building is a party and any circumstances that are likely to give rise to proceedings. Any information entered here will be shown in the new merge field {{&Building_Proceedings}} in the certificate template.
     - **Other Information** - Here you can record any other details or general information that may need to be disclosed by the building. Any information entered here will be shown in the new merge field {{&Building_Other_Info}} in the certificate template.
   - New option to include Leases and Licenses register report with certificate – There's also a new checkbox option that will allow you to include the Leases and Licenses Register report (that contains more detailed information) by default when generating a certificate. It is unticked by default.
   - New merge fields available under *File>Templates>Standard Merge Templates* for your certificate templates. The 6 new merge fields are {{&Building_Repairs}}, {{&Building_Liabilities}}, {{&Building_Leases_Licenses}}, {{&Building_Orders}}, {{&Building_Proceedings}} and {{&Building_Other_Info}}, and are available in the merge field list for you to use in your certificate template/s as required.

What you need to do

To use these new data fields and have the information appear in your certificates, you'll have to:

1. Enter details in the new data fields for each building (where required) on the *Building card>Info tab>Info Certificates accordion*.
2. Manually update your certificate template/s to insert the new merge fields where appropriate. This can be done easily by editing your certificate template/s under *File>Templates>Standard Merge Templates screen*.

See below for screenshots and instructions on updating your template/s.

6. **Attach documents when generating certificates** – To better assist clients with their disclosure requirements and make it easier to manage certificate attachments, you can now add documents as attachments using a new *Attachments* accordion on the Info Certificate generation screen.
    - Once documents are added, you can then view, reorder and remove them as required. The *Attachments* accordion is collapsed by default.
    - Any attachments will be automatically included when generating the certificate and in the certificate PDF file that's created and saved to Lot documents.
    - If there are register reports also being included with the certificate, the order of documents will be: *Certificate > Register Reports > Attachments*.

    See below for a detailed screenshot.

7. **Merge fields for OC Certificate (VIC)**
    - Change to merge field {{Total_Fees}} – The merge field for {{Total_Fees}} has been reformatted to currency and 2 decimals e.g. $100.11. Previously it was not in a currency format.
    - New merge fields - The below new merge fields are available for the OC Certificate template in Victoria. The merge fields are available in the merge field library and can be added to your templates as needed.
        - **Units of Entitlement (UOE)**
            - {{Total_UOE}} will populate the building's total UOE amount from the *Building card>Total UOE* field. Formatted to 3 decimals e.g. 10.111.
            - {{Lot_UOE}} will populate the Lot's UOE amount for the selected schedule. Formatted to 3 decimals e.g. 10.111.
        - **Fee Amounts by Fund**
            - {{Fee_Amount1_Admin}} to {{Fee_Amount12_Admin}} will populate the Admin Fund amount for each standard fee. Formatted to currency and 2 decimals e.g. $100.11.
            - {{Fee_Amount1_Maint}} to {{Fee_Amount12_Maint}} will populate the Maintenance Fund amount for each standard fee. Formatted to currency and 2 decimals e.g. $100.11.

- {[Total_Fees_Admin}} will populate the Admin Fund total amount for all standard fees in the current levy year (excluding interest). Formatted to currency and 2 decimals e.g. $100.11.
- {[Total_Fees_Maint}} will populate the Admin Fund total amount for all standard fees in the current levy year (excluding interest). Formatted to currency and 2 decimals e.g. $100.11.

GENERAL

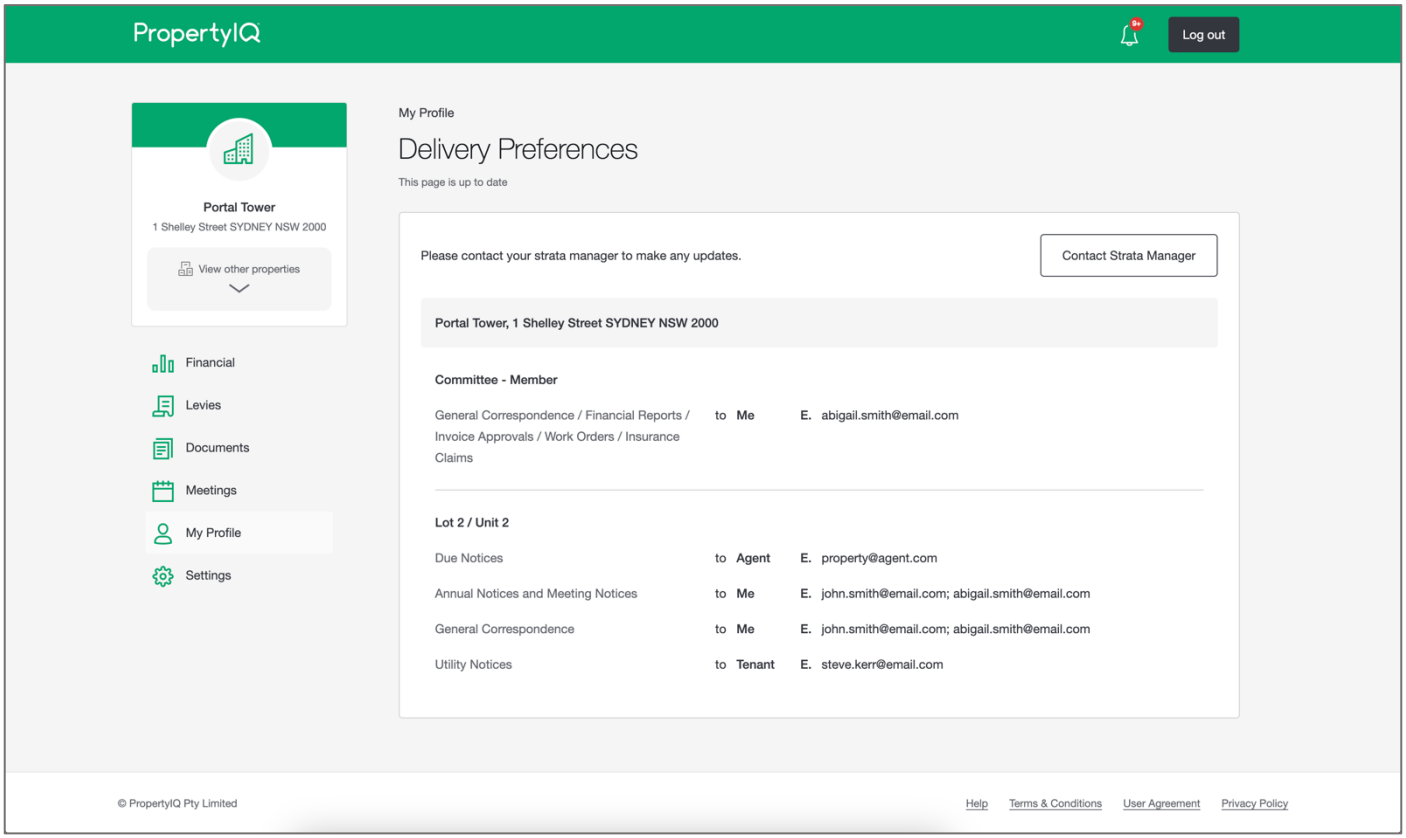
8. **Discount on budgets using 'Levy Income Only' setting** – An issue has been fixed to ensure that discount is being calculated on a budget that's using 'Levy Income Only' budget setting, where historically discount was not being calculated when this setting is used.
9. **Income and Expenditure report for multi-schedule buildings** – An issue has been fixed where generating a financial report for a multi-schedule building and selecting the 'group accounts' and 'split schedules' options would cause an error. This was being caused when there were no income or expense transactions in one of the schedules. You'll no longer see an error when generating the report with these conditions.
10. **Deleted levies when unlocking opening balances for a building** – An issue has been fixed to ensure that when unlocking opening balances of a building, the deleted levies are recorded in the Audit Trail (unlocking opening balances deletes any levies that were created when locking opening balances).

    This will ensure that the PIQ Portal is also updated, avoiding issues with lot ledgers and incorrect 'next levy due' dates.
11. **Email template > Remittance advice** – An issue has been fixed to ensure that the *Strata Plan* and *Building Name* merge fields are correctly populating in Remittance Advice email templates. When a supplier has multiple invoices for multiple buildings, which are all paid in one payment run (causing multiple remittance advices to be issued at the same time), then the merge fields were using the details of the first building only and not populating with the details of each building.
12. **Email templates > Meeting Notice and Minutes –** An issue has been fixed to ensure that the *Recipient Name* merge field is populating the recipient name in the meeting related email templates. Currently this field is populating blank. The recipient name that's populated is taken from the *Lot card> Delivery tab> Annual Notices and Meeting Notices accordion> Name field*.

VIEW DELIVERY PREFERENCES UNDER MY PROFILE

The *My Profile* page has been revamped to provide owners and committee members with clear visibility of their delivery preferences.

This will be enabled by default for all PropertyIQ clients; however, it can be customized via the Configurations page accessible through the Strata Manager login.

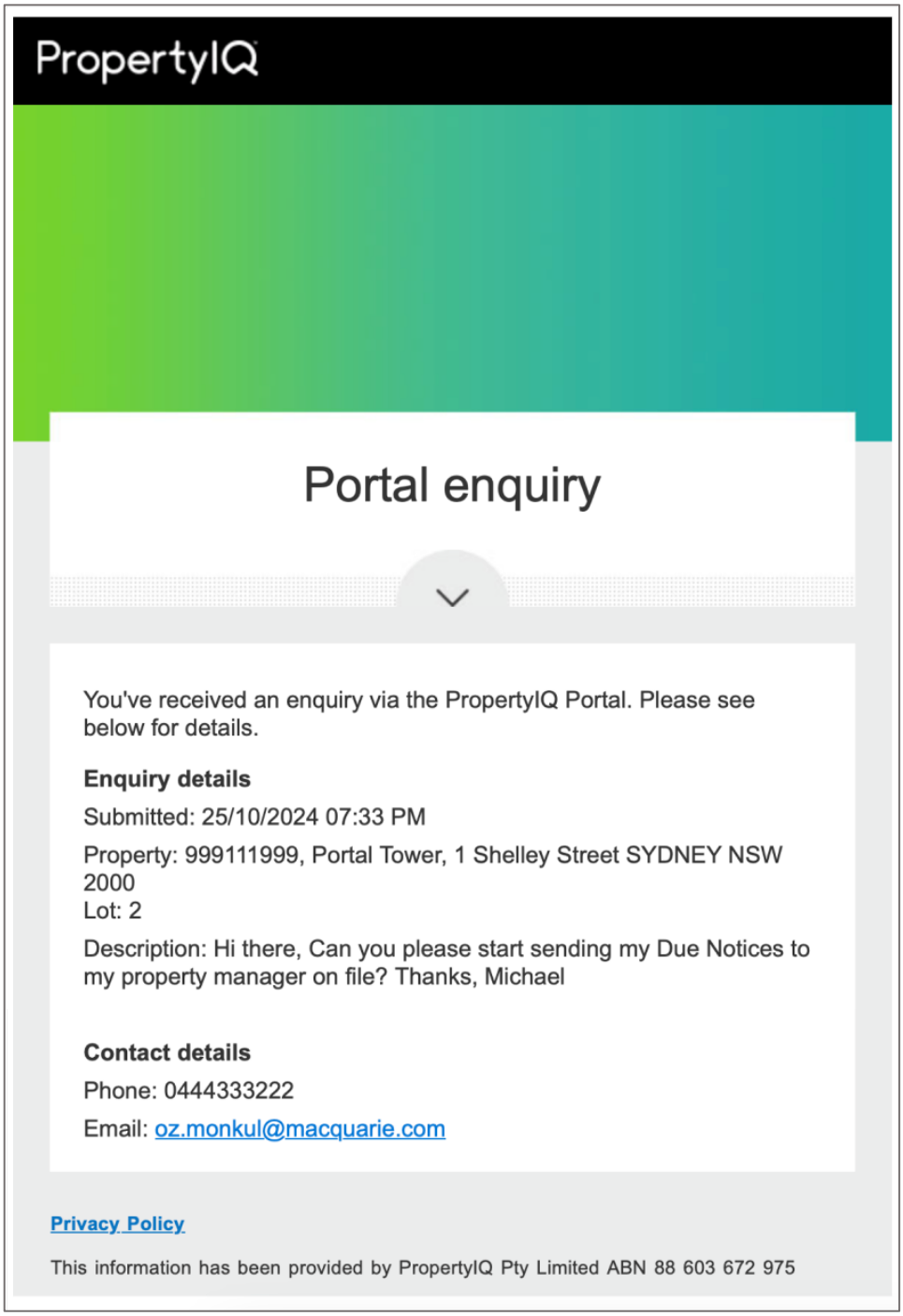


CONTACT STRATA MANAGER UPLIFT

We have enhanced the *Contact Strata Manager* function available on the *My Property* and *My Profile* pages. Now, when owners send through an enquiry, their lot information is automatically included, making it easier to identify and respond.

This feature can be tailored to your preferences through the *Strata Manager Contact Info* setting found on the Configurations page of the Strata Manager login.

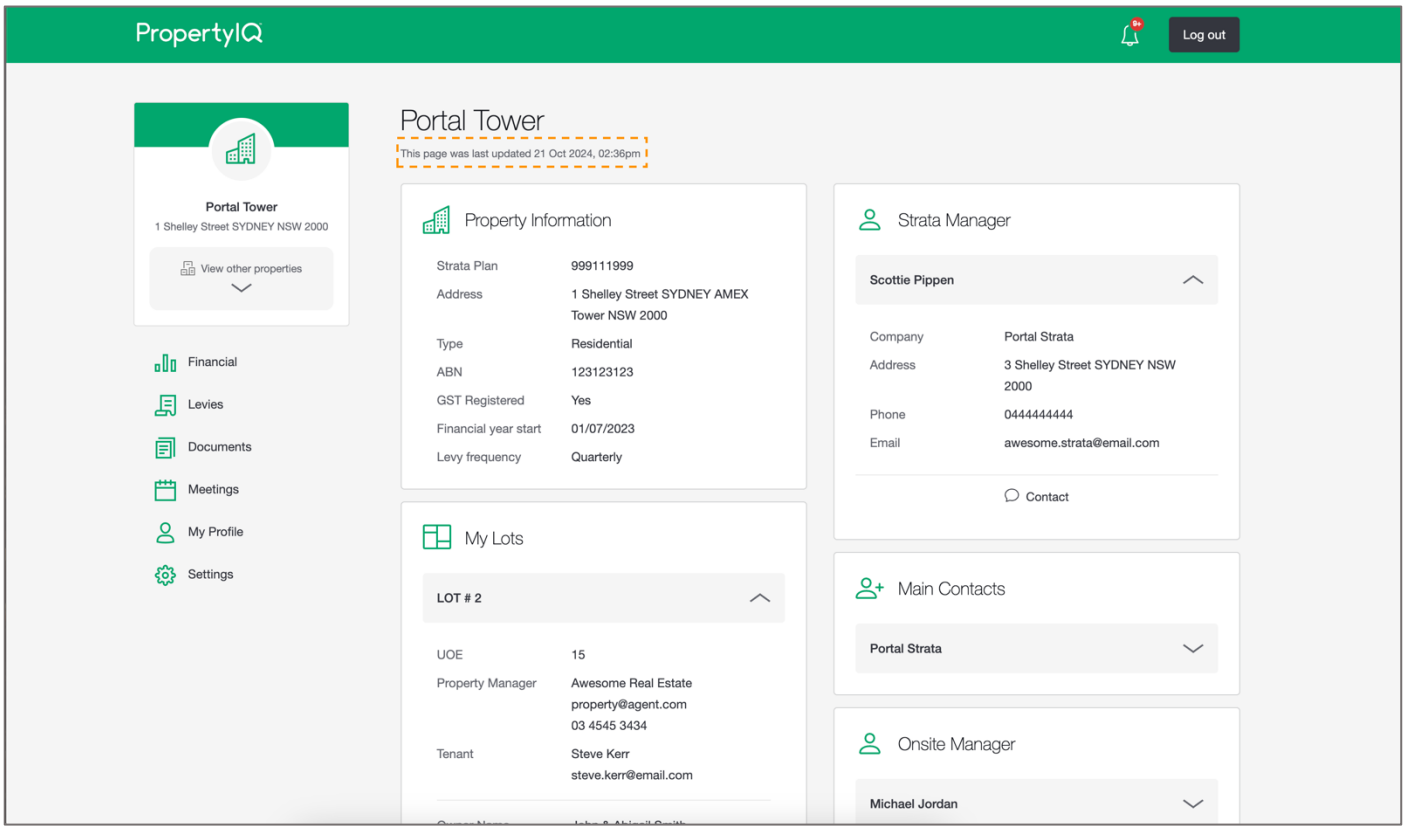
Please note: This feature sends the enquiry to the email address provided in Utilities > Settings > Company details of PropertyIQ.

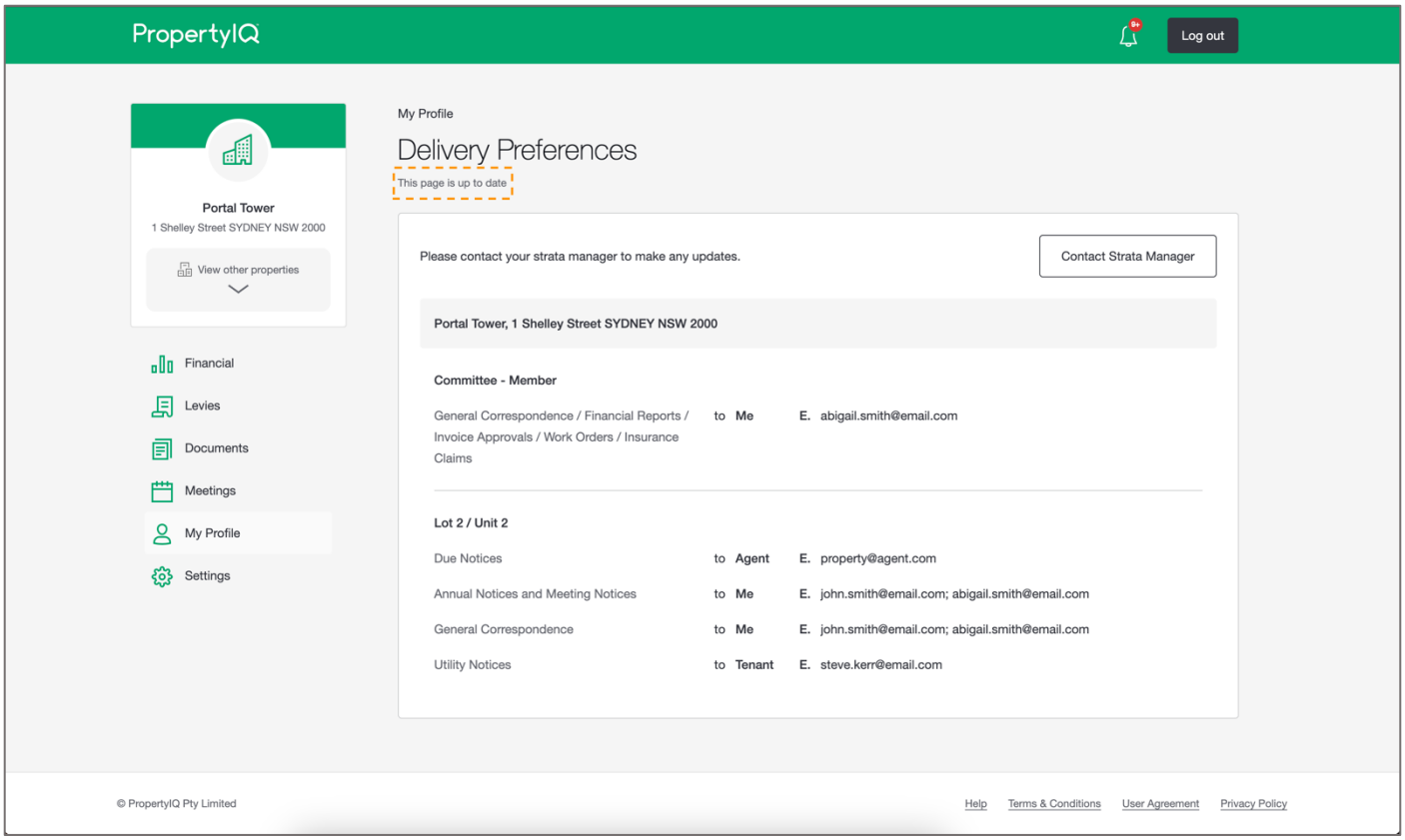


REAL-TIME DATA SYNC

PropertyIQ Portal now uses real-time data synchronization. The *My Profile* page is the first to benefit from this upgrade, ensuring that the information owners and committee members see is always current.

Additionally, we've added hints across the portal to indicate the freshness of the data on each page.





IMPROVED ACCESSIBILITY

We’re continuing our commitment to making the portal accessible to all users. We’ve made significant improvements to ensure that more of the portal can be navigated using just a keyboard.

IMPROVED USER EXPERIENCE

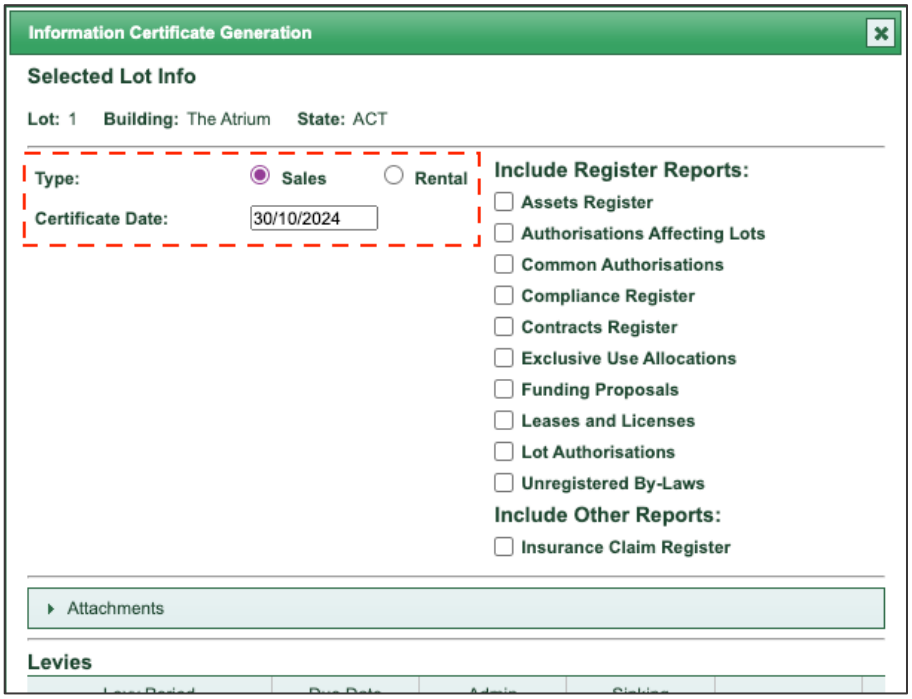
While many of these improvements are under-the-hood and might not be immediately visible, they are crucial for providing a smoother, more reliable experience. Here are some notable enhancements:

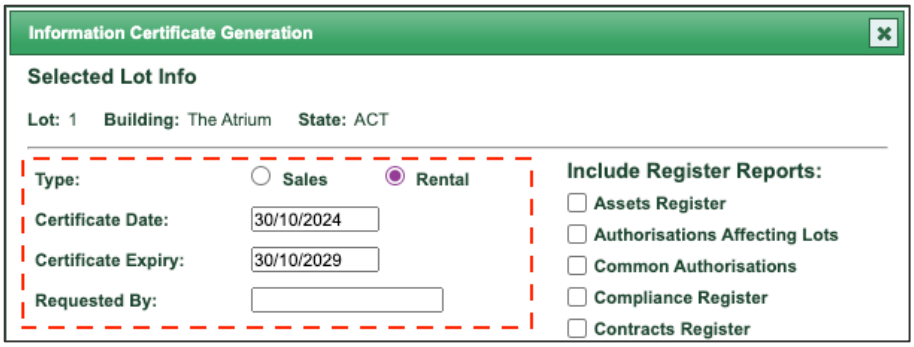
- **Faster login**: We're implementing improvements to streamline the login process, making it quicker and more efficient for users to access their accounts and information.
- **Faster user search and export**: We’ve improved the performance of user search and export functions in the Strata Manager login.

ITEM 2 – LEGISLATION CHANGES (ACT) – SELECT CERTIFICATE TYPE DURING GENERATION

When generating a certificate for a lot in an ACT building, you can now choose between generating a Sales certificate or a Rental certificate.

- **Sales** certificate is selected by default.
- When selecting a **Rental** certificate, you'll see additional options for
    - *Certificate Expiry* date (defaulted to 5 years from today's date)
    - *Requested By* (free text field, blank by default)



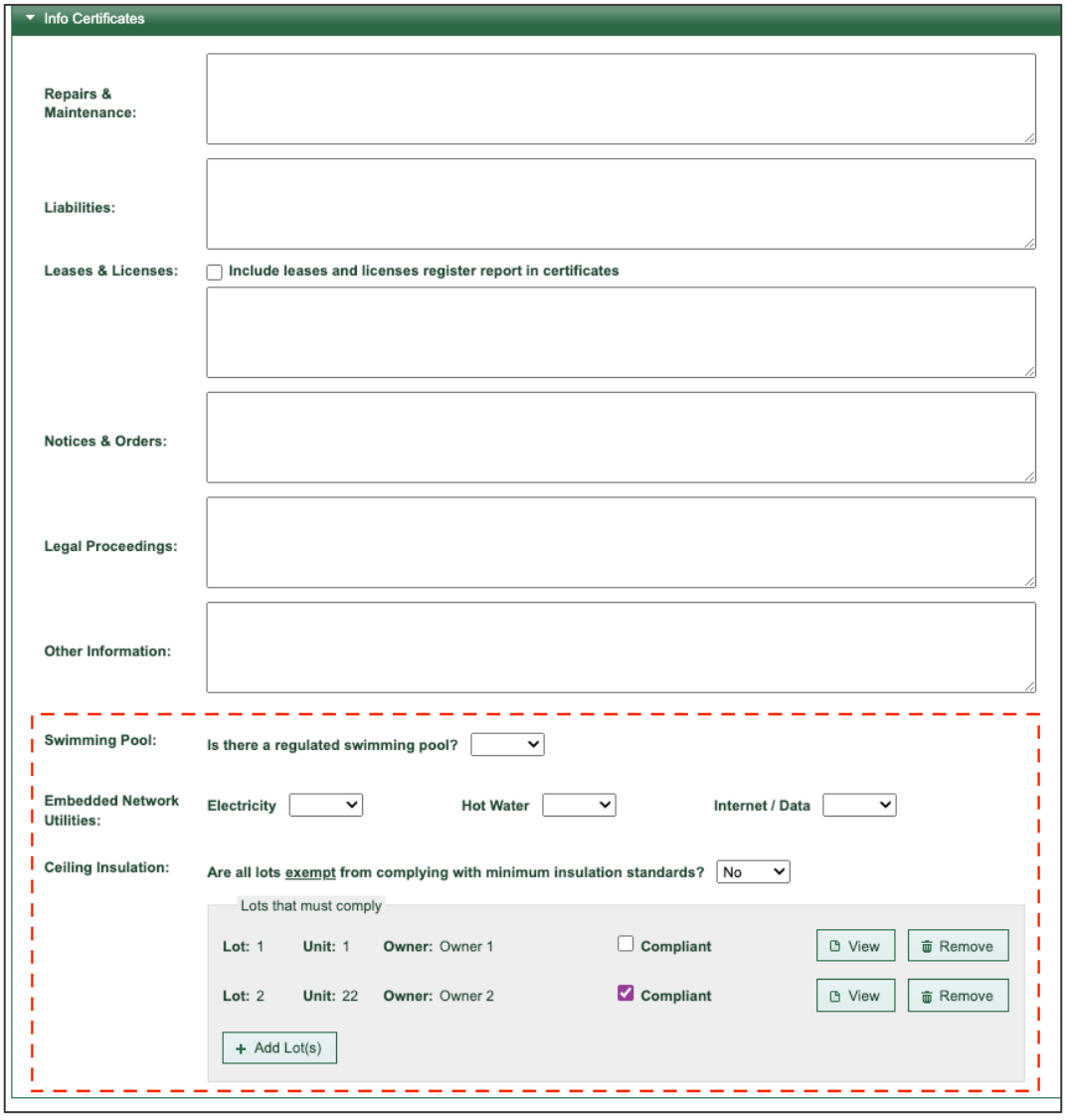


ITEM 3 – LEGISLATION CHANGES (ACT) – NEW DATA FIELDS

You can now record important information on an ACT building under **Building card>Info tab>Info Certificates accordion** about swimming pool, embedded network utilities and ceiling insulation. This information must be disclosed in the new Rental Certificate, so you can enter the information here and it will pre-populate into your certificate.

Any changes made to these fields are recorded in the building's log of changes.

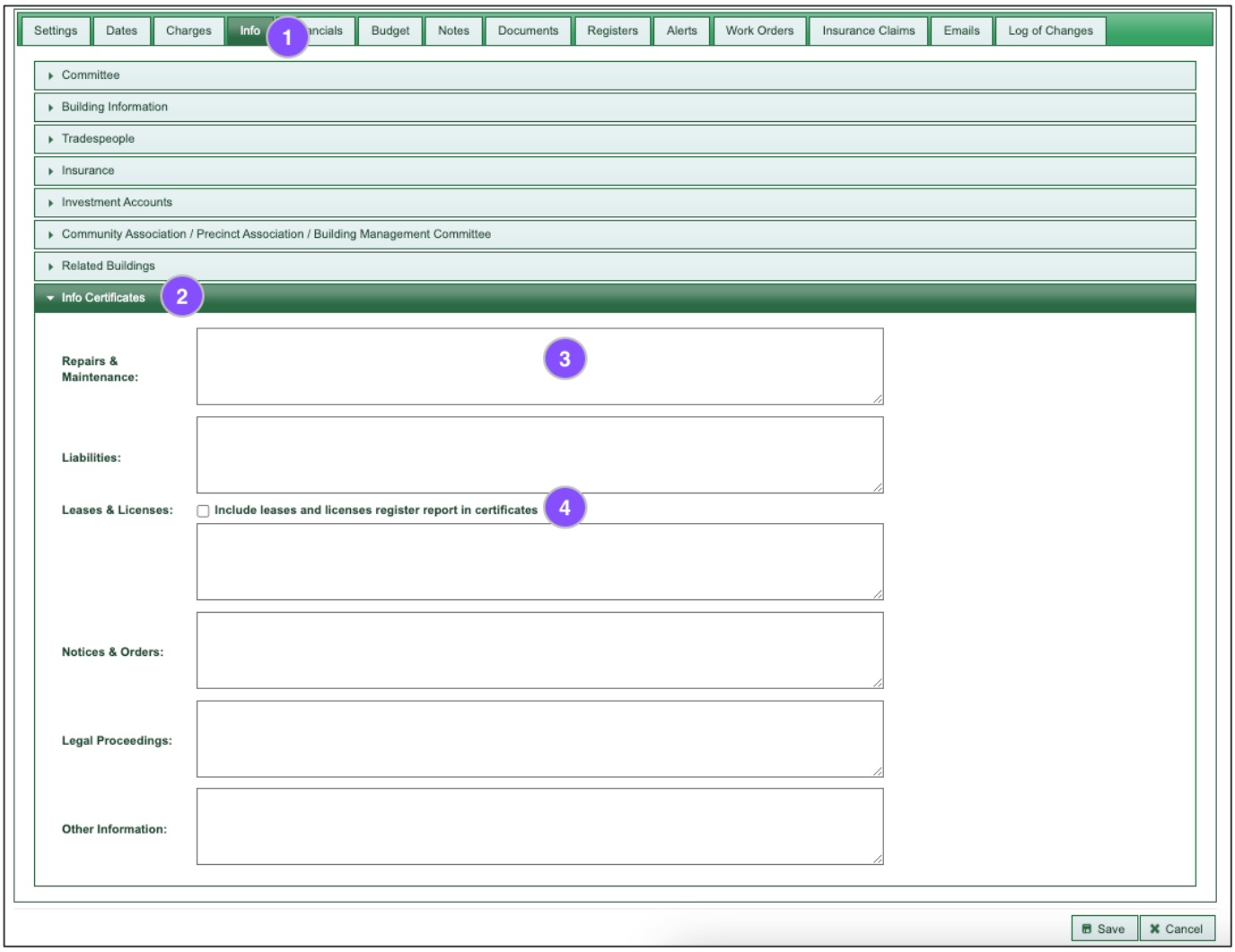
- Swimming pool: You can select *Yes* or *No* to "Is there a regulated swimming pool?". The dropdown is blank by default and not mandatory.
- Embedded network utilities: You can select *Yes* or *No* to whether there's an embedded network for Electricity, Hot Water and Internet/Data. The three dropdowns are blank by default and not mandatory.
- Ceiling insulation: You can select *Yes* or *No* to "Are all lots exempt from complying with minimum insulation standards?". The dropdown is blank by default and not mandatory.
    - When selecting *No*, an additional section will appear and you can select the Lots that must comply with the standards and tick whether they are compliant. You can view, add and remove lots from this section as required.



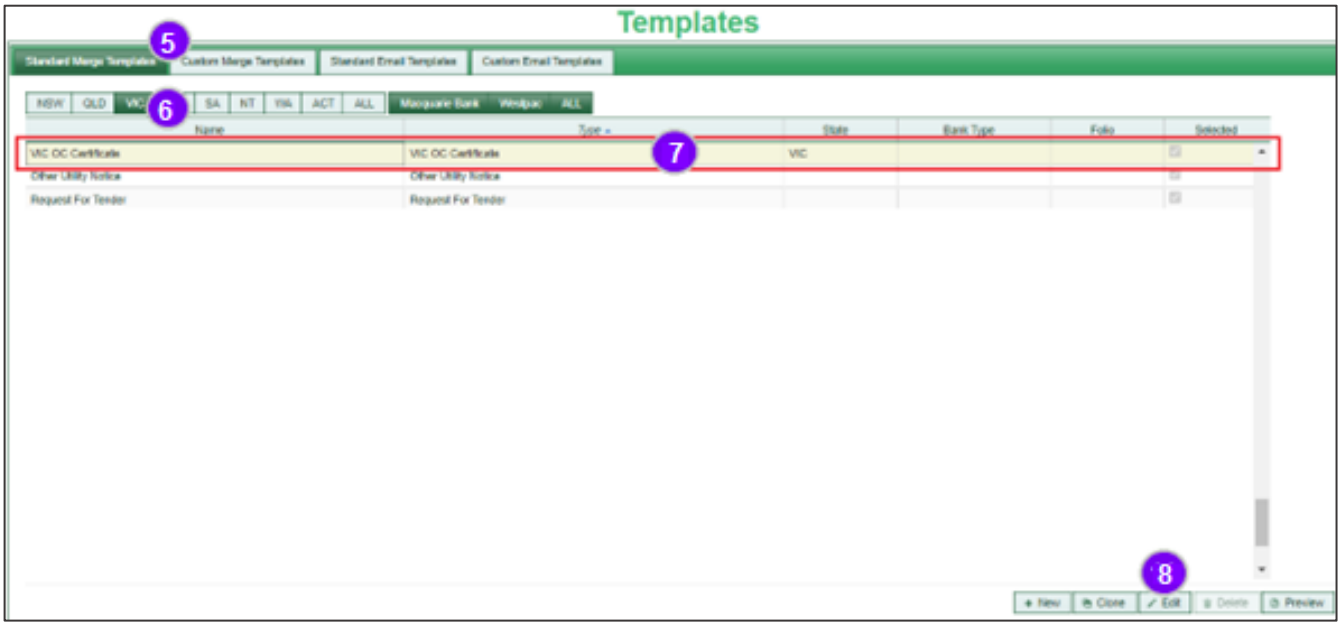
ITEM 5 – INFO CERTIFICATES - NEW DATA FIELDS ON BUILDING CARD

USE NEW DATA FIELDS & UPDATE CERTIFICATE TEMPLATE

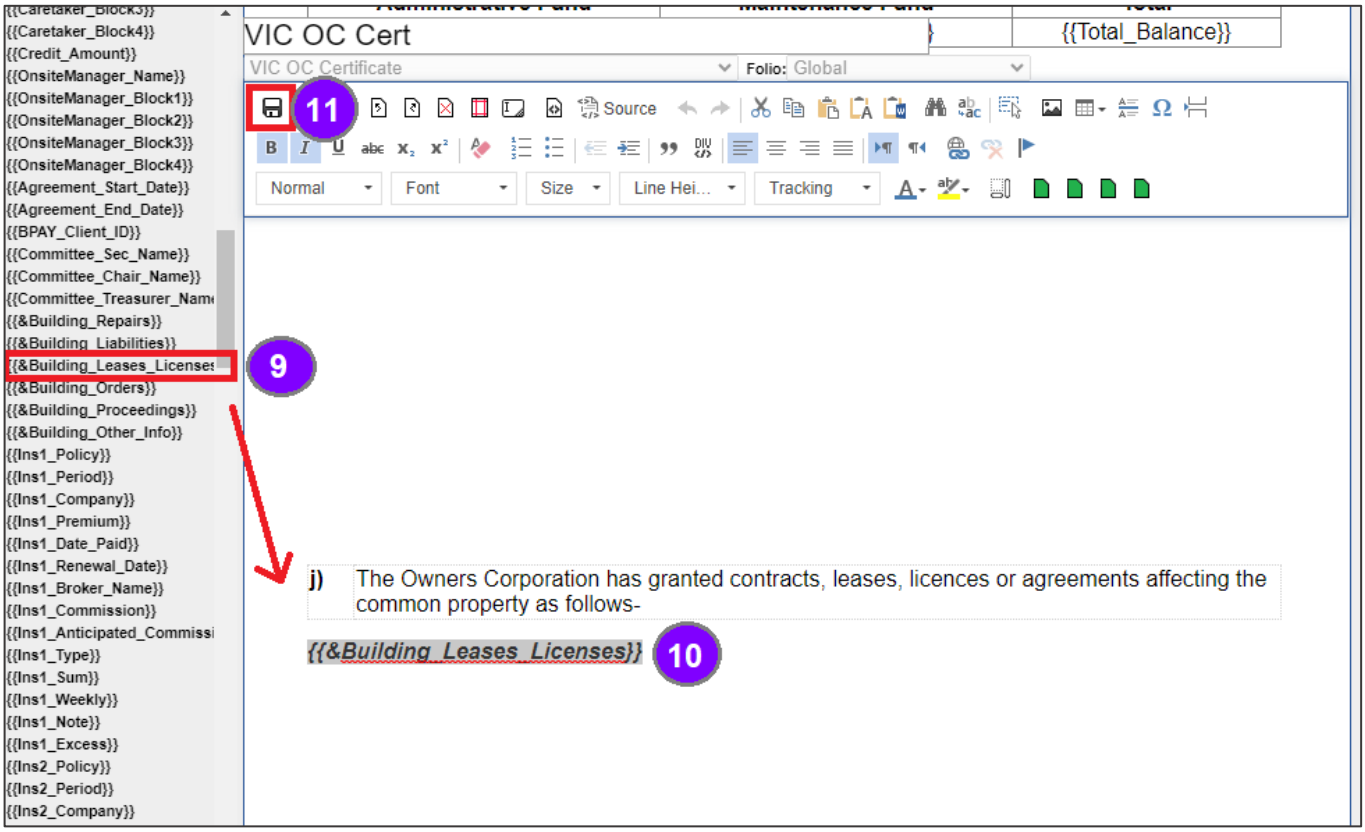
1. On the building card, go to the *Info* tab
2. Click on the *Info Certificates* accordion
3. Here you can record any details as required using the relevant fields. Any information entered here will be shown in the corresponding merge fields available in the certificate template.
4. Here you can tick the checkbox to include the Leases and Licenses Register report by default when generating a certificate for a lot. It is unticked by default.



5. To **update your certificate template/s**, go to *File>Templates>Standard Merge Templates screen.*
6. Select your *State* filter to view templates specific to you (if not already selected).
7. Find and click on the relevant certificate template in the list.
8. Click on *Edit* button to open and edit the template. Alternatively, you can double click on the template in the list to open and edit.

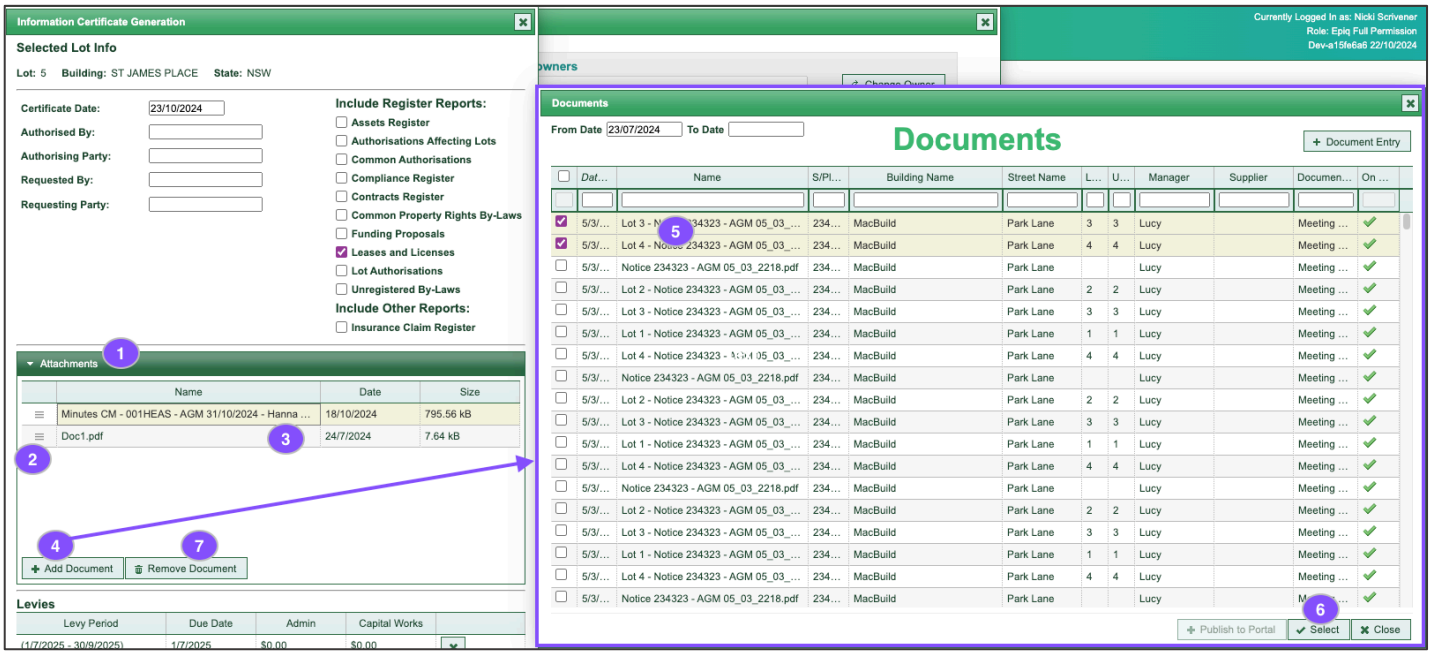


9. Find and locate the new merge fields in the merge field list.
10. Insert into your template where applicable.
11. Click the Save button to save your changes.



ITEM 6 – INFO CERTIFICATES – ATTACH DOCUMENTS WHEN GENERATING CERTIFICATES

To better assist clients with their disclosure requirements and make it easier to manage certificate attachments, you can now add documents as attachments using a new *Attachments* accordion on the Info Certificate generation screen. Once documents are added, you can then view, reorder and remove them as required. The *Attachments* accordion is collapsed by default.

Any attachments will be automatically included when generating the certificate and included within the one certificate PDF file that's created and saved to Lot documents. If there are register reports also being included with the certificate, the order of documents will be: *Certificate* > *Register Reports* > *Attachments*.

1. On the Info Certificate Generation screen (under *Lot card>Info Certificate button*), click on the *Attachments* accordion to open it.
2. Use the reorder icon to drag and drop your documents in the correct order.
3. View the details of the document here. Double click on the document to open and view it.
4. You can add documents using the *+Add Document* button.
5. Search and select one or more documents from the list.
6. Click the *Select* button to add the documents.
7. You can remove any documents by selecting a document in the list so it's highlighted, then clicking the *Remove* button.