PropertyIQ™

Release Notes

October 2023

This release includes platform changes to:

- PropertyIQ

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REPORTING

1. **New exports available –** You can now export reports for work orders, insurance claims, building registers, diary, activity log and summary arrears list. You'll see a new *Export* button next to the existing *Generate* button on the respective report generation screens. If a user has permission to generate the relevant report, they'll also have permission to generate the export.

   Note: For building registers, each register will be exported into a separate sheet within the excel file.

2. **New Folio filters** - You can now filter by Folio when generating reports for work orders and insurance claims.

INFO CERTIFICATES

3. **(VIC) OC Certificate data fields on building card** - For VIC buildings, all of the text fields under *Building card>Info tab>Info Certificate accordion* now have validation that prevents the building being saved if the fields contain any of the following non-standard characters:
   - ! @ # [{ }] ? * ` ~ ^ + = < >
   - If you're having trouble saving changes to a building, check these fields for error codes.

4. **(VIC) OC Certificate – New data field for leases and licenses** – In addition to the five (5) new data fields that were released in our April 2023 product release, there's now a new data field for leases and licenses.
   - **New data field** called 'Leases and Licenses' under *Building card>Info tab>Info Certificate accordion*. The field is blank by default and has a character limit of 800 characters. Changes to this field will be captured in the audit trail.
   - **New merge field** called {{&Building_Leases_Licenses}} available under *File>Templates> Standard Email Templates>VIC>OC Certificate template*. This merge field will pre-populate the information entered in the 'Leases and Licenses' data field on the building card.
   - **New option to include register report in certificates** – 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.

   What you need to do

   To use the new Leases and Licenses data field and have the information appear in your OC Certificates, you'll have to:

   1. On the *Building card>Info tab>Info Certificates accordion*:
      a. Enter details in the new 'Leases and Licenses' data field for each OC (where required)
      b. Decide to include the leases and licenses register report by default when generating certificates. If you tick the checkbox, it will be included.
   2. Manually update your OC Certificate template/s to insert the new merge field where appropriate. This can be done easily by editing your OC Certificate template under *File>Templates>Standard Email Templates screen*.

   Refer below for screenshots and instructions on updating your template.

5. **Leases and Licenses register –** You can now include the leases and licenses register report when generating:
    - Info Certificates using the new checkbox option on the Information Certificate Generation screen for register reports.
    - Strata Roll Report using the new checkbox option under the *Reporting>Building tab>Strata Roll accordion*.
6. **Compliance register > New types and statuses –** Under *Building card>Registers tab>Compliance Register accordion*, you can now assign compliance types and statuses to each item in the compliance register, as well as setup and manage your default global list of types and statuses.
    - Global list of compliance types and statuses **-** You can manage your default list of types and statuses from *Utilities>Settings>Compliance tab*. These will then form your default list to choose from when adding or editing items in the building compliance register on the building card.
        - **Add**: For types and statuses, you can use the *+Add* button to add a new item to the list. The name must be unique and not exceed 100 characters.
        - **View/Edit/Delete**: For types and statuses, you can use the *+View* button to view details of the item, edit the name and delete it. You can only delete an item if it's not in use in the compliance register.
        - **Consolidate Types**: You can tidy up and consolidate multiple types that are shown in the compliance types list (e.g. merge 2 into 1) by using the *Consolidate Types* button.

          For example, 'Pool' and 'Pool inspection' can be merged together into 'Pool' and all register items attached to 'Pool inspection' will be automatically transferred to 'Pool'. You can then delete the redundant type of 'Pool inspection' as it's no longer in use.
    - Compliance register screen
        - **Type**: When adding or editing a compliance register item, the existing free text field for 'Compliance Type' has now been converted into a dropdown field. This will display compliance types from the default global list under *Utilities>Settings> Compliance tab>Building Compliance Types section*.
            - The text previously entered in the compliance type free text field has been automatically converted to the default list under Settings. You will need to tidy up, consolidate and remove types in this list as required.
        - **Status**: A new dropdown field for 'Status' has been added. This will display compliance statuses from the default list under *Utilities>Settings>Compliance tab>Building Compliance Statuses section*. This list is blank by default.
    - Reports and Diary
        - The compliance register report, compliance report export, diary screen and the diary report ('Compliance register' diary type) have all been updated to include the compliance type for each item.

What you need to do

You'll need to setup and review your global list of compliance types and statuses under *Utilities>Settings>Compliance tab.*

There will be some compliance types shown in the types list already. This is because the text previously entered in the compliance type free text field has been automatically converted to the default list (to maintain your previous labelling/naming conventions). You will need to tidy up, consolidate and remove types in this list as required.

Refer below for screenshots and instructions.

GENERAL

7. **Levy/Fee due dates outside of 30 days –** You can now set the due date for a levy/fee more than 30 days outside the levy period start date. The restriction that enforced a levy due date within 30 days of the levy start date has been removed.

   This change has been applied to the Levy Maintenance screen under *Processing>Adjustments>Levy Maintenance* and on the Special Levies/Fees screen under *Billing>Special Levies/Fees*.

   NOTE: A further change is planned to also allow you to do this from the building's budget screen.

8. **Cashbook screen > New search function** – To make it easier to find documents (bank statements, cash book reports, reconciliation reports) under the *End of Period>Cash Book>Reports and Statements screen*, you'll now see separate columns for S/Plan, BSB, Account No, Account Name. You'll be able to sort and search the content within each of these columns to filter the records.

9. **Split deposits for unallocated owner deposits** - Improvements have been made to the TXN receipting screen. You can now move unallocated owner deposits from the 'Unallocated' tab to the 'Adjustments' tab using the new *Move to Adjustments* button. From the 'Adjustments' tab, you can then process the owner deposit as a split deposit using the existing 'Split deposit' button.

10. **Work orders** – An issue has been fixed where an intermittent internal server error would appear when trying to generate a work order when the contact details in the Requesting Lot section are left blank.

11. **Background server jobs > Document runs via BING Mailhouse –** An intermittent issue has been fixed when processing document runs, where clients where occasionally receiving a background server error e.g. processing of due notices, lot merge letters, meeting notices and any document capable of being sent to BING Mailhouse. Improvements have been made to the BING API to avoid this happening in future.

12. **API Improvements –** We've made improvements to our API endpoints for Buildings and Suppliers to allow optional filtering of certain data.

    - API endpoint for *Get/Suppliers*
        - New optional parameter for **supplier type**: This will filter suppliers using the list of supplier types you've created in your PIQ under *File>Suppliers>Supplier card>Settings tab> Supplier Types accordion*.
        - New optional parameter for **compliance status**: This will filter suppliers with a compliance status of compliant (value = 1 or true) or non-compliant (value = 0 or false).
        - New optional parameter for **supplier status**: This will filter suppliers with a status of active (value = 1 or true) or inactive (value = 0 or false).

    - API endpoint for *Get/Buildings*
        - New field and optional parameter for **active insurance policies**: There is a new field for status of insurance policies (active/inactive). And an optional filter for status (value = 1 or true) or inactive (value = 0 or false).

    NOTE: For clients and third party providers using PropertyIQ public APIs, we'll be contacting you directly to provide an updated copy of PIQ API documentation. In the meantime, you can also request this by contacting us at propertyiq@macquarie.com.

ITEM 3 - OC CERTIFICATE - NEW DATA FIELD FOR LEASES AND LICENSES (VIC)

In addition to the five (5) new data fields that were released in our April 2023 product release, there's now a new data field for leases and licenses.

- **New data field** called 'Leases and Licenses' under *Building card>Info tab>Info Certificate accordion*. The field is blank by default and has a character limit of 800 characters. Changes to this field will be captured in the audit trail.
- **New merge field** called {{&Building_Leases_Licenses}} available under *File>Templates> Standard Email Templates>VIC>OC Certificate template*. This merge field will pre-populate the information entered in the 'Leases and Licenses' data field on the building card.
- **New option to include register report in certificates** – 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.

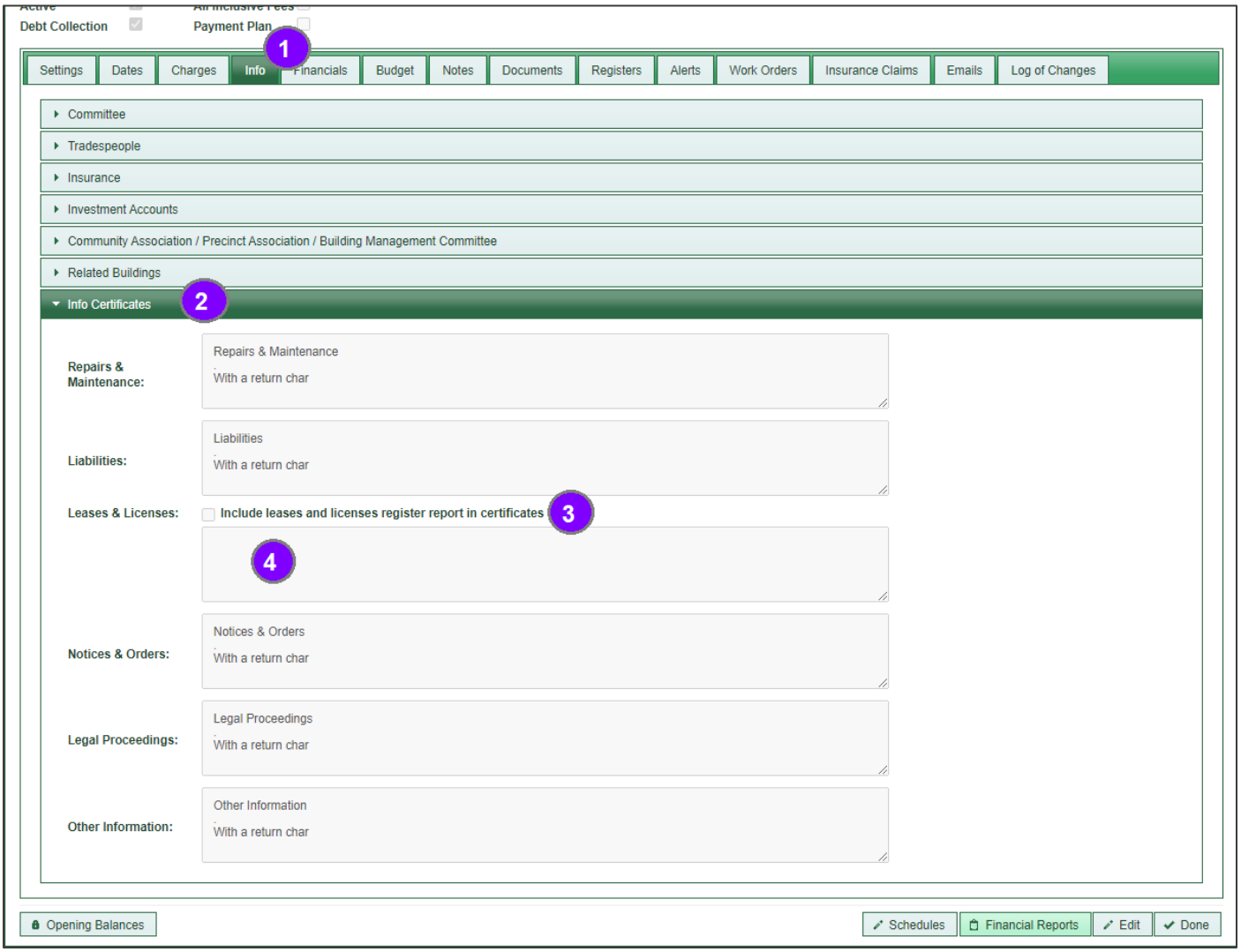
What you need to do

To use the new Leases and Licenses data field and have the information appear in your OC Certificates, you'll have to:

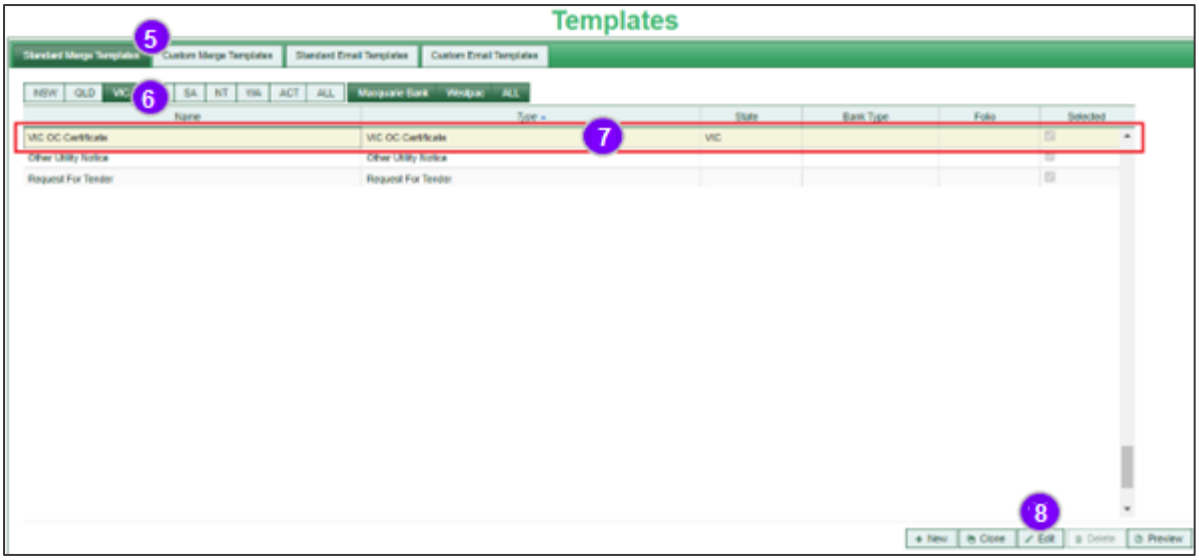
1. On the *Building card>Info tab>Info Certificates accordion*:
   a. Enter details in the new 'Leases and Licenses' data field for each OC (where required)
   b. Decide to include the leases and licenses register report by default when generating certificates. If you tick the checkbox, it will be included.
2. Manually update your OC Certificate template/s to insert the new merge field where appropriate. This can be done easily by editing your OC Certificate template under *File>Templates>Standard Email Templates screen*.

USE NEW DATA FIELD & UPDATE OC CERTIFICATE TEMPLATE

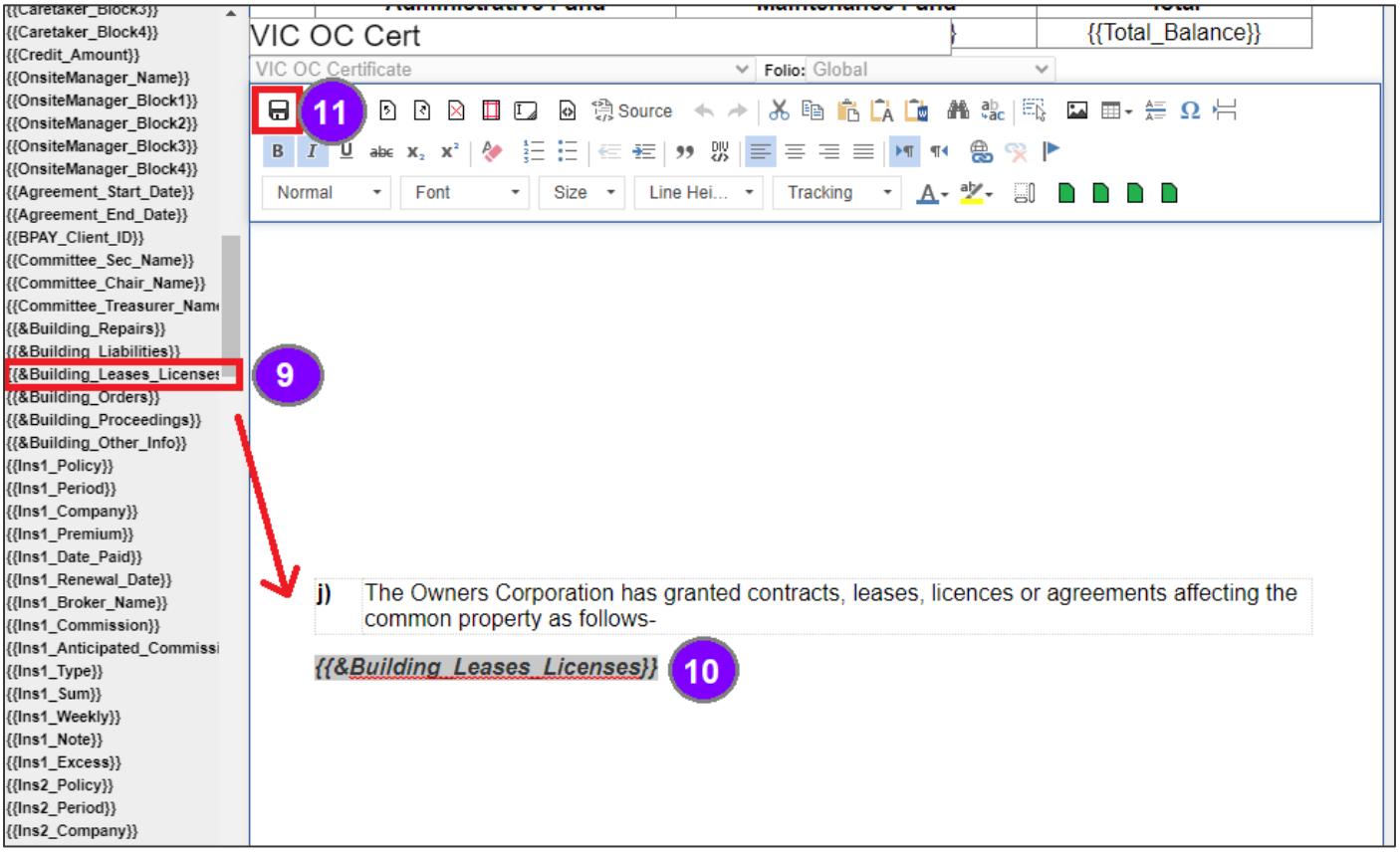
1. On the building card, go to the *Info* tab
2. Click on the *Info Certificates* accordion
3. Here you can tick the checkbox to include the Leases and Licenses Register report by default when generating an OC Certificate for a lot. It is unticked by default.
4. Here you can record details of any leases and licenses over common property or a lot. Any information entered here will be shown in the new merge field {{&Building_Leases_Licenses}} available in the OC Certificate template.



5. To **update your OC Certificate template**, go to *File>Templates>Standard Merge Templates screen.*
6. Select the *VIC* State filter to view templates specific to Victoria (if not already selected).
7. Find and click on the relevant OC 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 located the new merge field in the merge field list.
10. Insert into your template where applicable.
11. Click the Save button to save your changes.



ITEM 5 – COMPLIANCE REGISTER – NEW TYPES AND STATUSES

Under *Building card>Registers tab>Compliance Register accordion*, you can now assign compliance types and statuses to each item in the compliance register, as well as setup and manage your default global list of types and statuses.

- **Global list of compliance types and statuses**
    - You can manage your default list of types and statuses from *Utilities>Settings>Compliance tab*. These will then form your default list to choose from when adding or editing items in the building compliance register on the building card. From this screen, you can:
        - Add: For types and statuses, you can use the *+Add* button to add a new item to the list. The name must be unique and not exceed 100 characters.
        - View/Edit/Delete: For types and statuses, you can use the *+View* button to view details of the item, edit the name and delete it. You can only delete an item if it's not in use in the compliance register.
        - Consolidate Types: You can tidy up and consolidate multiple types that are shown in the compliance types list (e.g. merge 2 into 1) by using the *Consolidate Types* button.

          For example, 'Pool' and 'Pool inspection' can be merged together into 'Pool' and all register items attached to 'Pool inspection' will be automatically transferred to 'Pool'. You can then delete the redundant type of 'Pool inspection' as it's no longer in use.

- **Compliance register screen**
    - Type: When adding or editing a compliance register item, the existing free text field for 'Compliance Type' has now been converted into a dropdown field. This will display compliance types from the default global list under *Utilities>Settings> Compliance tab>Building Compliance Types section*.
        - The text previously entered in the compliance type free text field has been automatically converted to the default list under Settings. You will need to tidy up, consolidate and remove types in this list as required.
    - Status: A new dropdown field for 'Status' has been added. This will display compliance statuses from the default list under *Utilities>Settings>Compliance tab>Building Compliance Statuses section*. This list is blank by default.

- **Reports and Diary**
    - The compliance register report, compliance report export, diary screen and the diary report ('Compliance register' diary type) have all been updated to include the compliance type for each item.

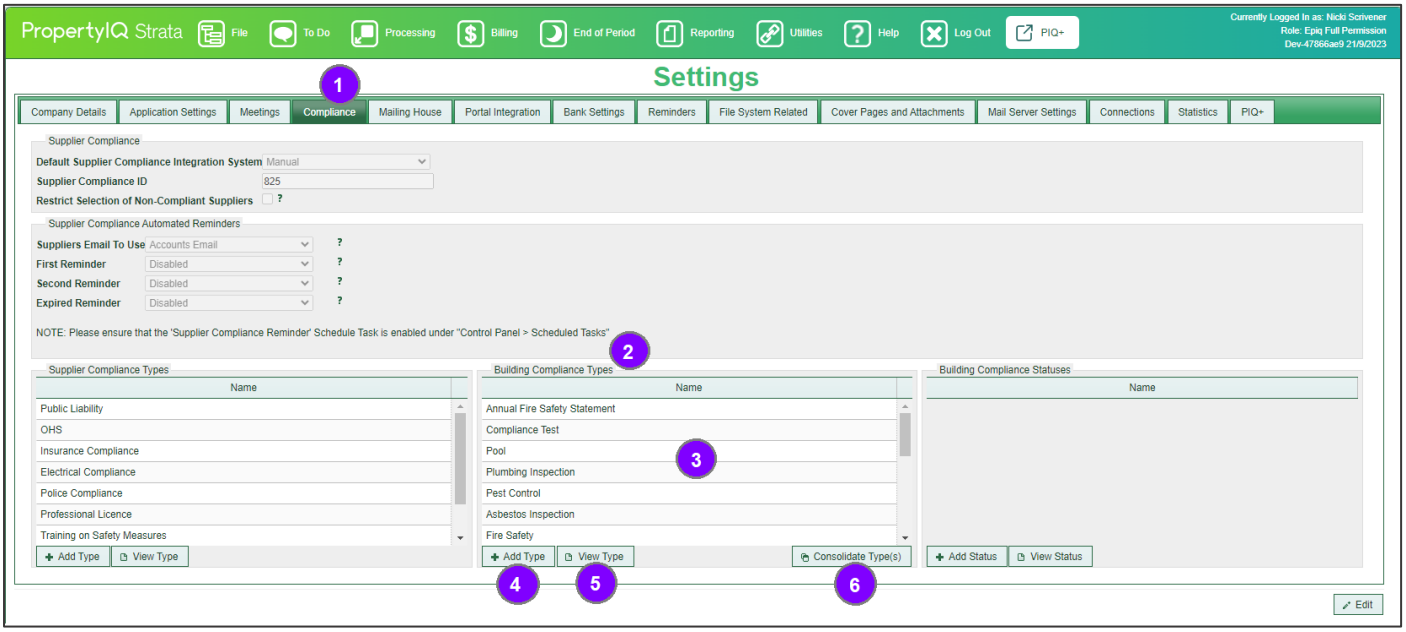
What you need to do

1. You'll need to setup and review your global list of compliance types and statuses under *Utilities>Settings>Compliance tab.*
2. There will be some compliance types shown in the types list already. This is because the text previously entered in the compliance type free text field has been automatically converted to the default list (to maintain your previous labelling/naming conventions). You will need to tidy up, consolidate and remove types in this list as required.

BUILDING COMPLIANCE TYPES – SETUP AND MANAGE YOUR GLOBAL LIST

- There is one (1) system default type called 'Annual Fire Safety Statement'. This cannot be deleted or edited.
- There will also be some other compliance types shown in the list already.
    - The text previously entered in the compliance type free text field has been automatically converted to the default list (to maintain your previous labelling/naming conventions).
    - You will need to tidy up, consolidate and delete types as required.
- The compliance types shown in this list will be available to choose from when adding or editing items in the building compliance register.
- You will not be able to delete a type if it's being used for a compliance register item.

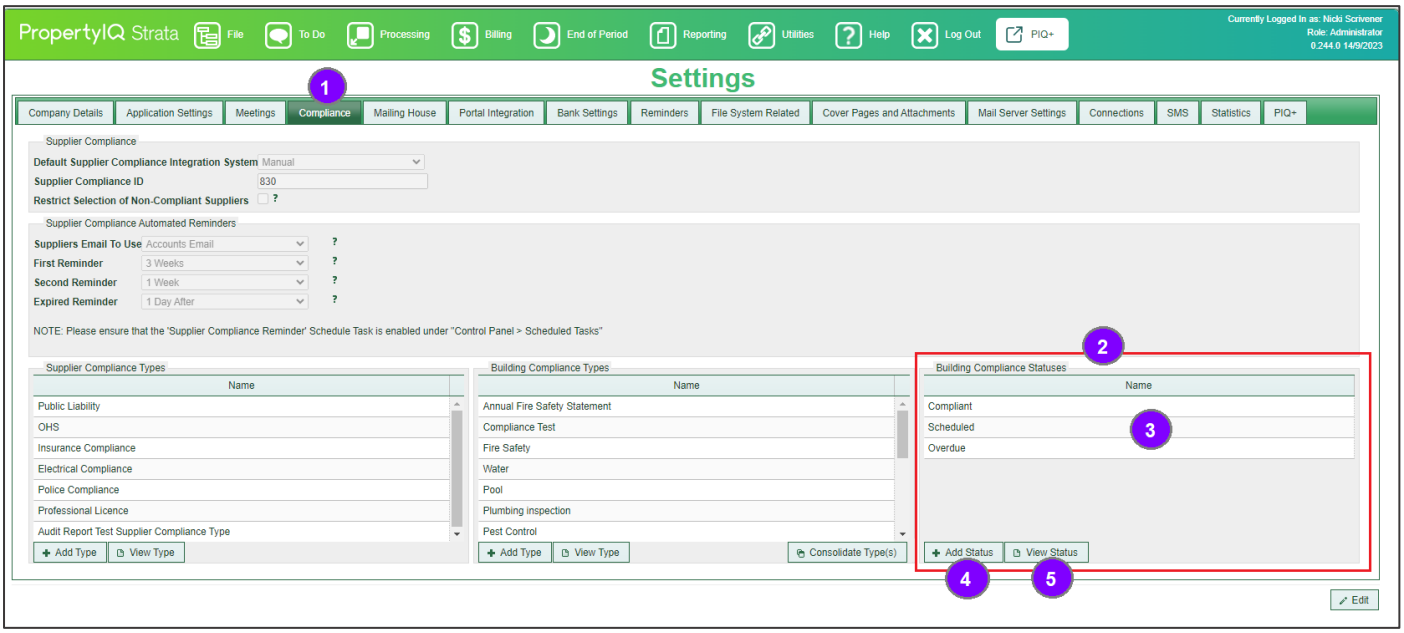
1. Go to *Utilities menu>Settings>Compliance tab.*
2. You can setup and manage your global list of default compliance types in the *Building Compliance Types* section here.
3. View existing compliance types in the list.
4. Select **+Add Type** to add a new compliance type. The name must be unique and not exceed 100 characters.
5. Select **View Type** to view and edit the details of a type in the list. Or you can also double click on one in the list.
6. Select **Consolidate Types** to tidy up and merge two or more types together.
   For example, 'Pool' and 'Pool inspection' can be merged together into 'Pool' and all register items attached to 'Pool inspection' will be automatically transferred to 'Pool'. You can then delete the redundant type of 'Pool inspection' as it's no longer in use.



BUILDING COMPLIANCE STATUSES – SETUP AND MANAGE YOUR GLOBAL LIST

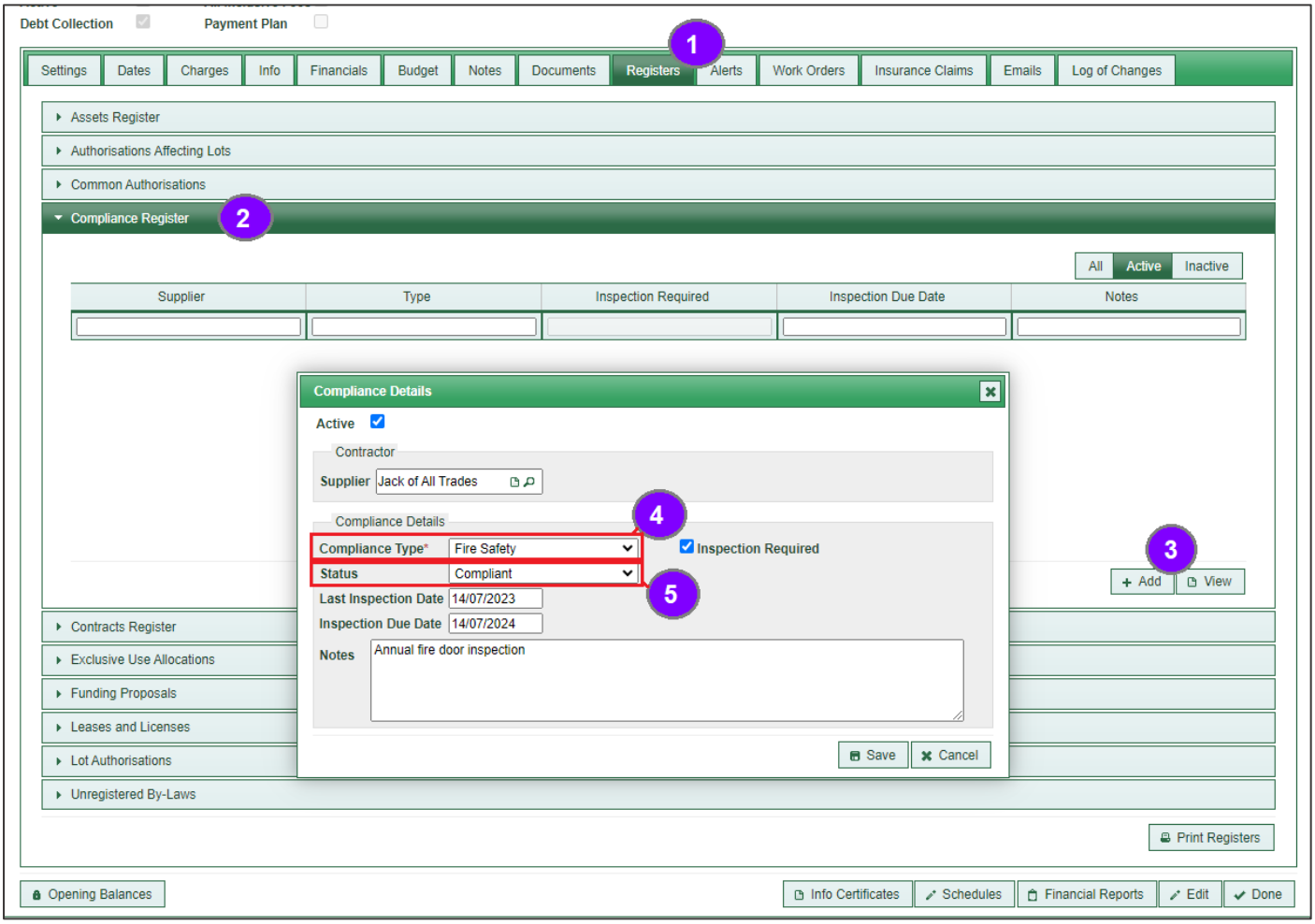
- There are **no** system default compliance statuses. This list will be blank initially.
- The compliance statuses shown in this list will be available to choose from when adding or editing items in the building compliance register.
- You will not be able to delete a status if it's being used for a compliance register item.

1. Go to *Utilities menu>Settings>Compliance tab.*
2. You can setup and manage your global list of default compliance statuses in the *Building Compliance Statuses* section here.
3. View existing compliance statuses in the list. This list will be blank initially.
4. Select **+Add Status** to add a new compliance status. The name must be unique and not exceed 100 characters.
5. Select **View Status** to view, edit and delete the status. Or you can also double click on one in the list.



BUILDING COMPLIANCE REGISTER – ASSIGN TYPE AND STATUS

- This options available from the building compliance register screen will be determined by the default list of compliance types and statuses under *Utilities>Settings> Compliance tab.*

1. On the building card, go to the *Registers tab*
2. Select the *Compliance Register accordion*
3. Select **+Add** or **View** buttons to add or open the details of a compliance item.
4. Select a compliance type from the Compliance Type dropdown.
5. Select a status from the Status dropdown.

Add, update and save the details of your compliance item as required.