PropertyIQ™

Release Notes

September 2024

This release includes changes to:

- PropertyIQ
- PropertyIQ Portal

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PROPERTYIQ

REMOVAL OF CHEQUE PAYMENTS

1. **Removal of cheque payment options –** From November 2024, Macquarie Bank will no longer offer cash or cheque services and as a result there's some changes in PropertyIQ. You'll no longer be able to process new cheque payments, so we've removed the cheque payment method for suppliers and lot owner refunds.

   Any suppliers that currently have cheque as their payment method will be automatically updated to direct deposit, and you'll need to enter bank details before processing a payment. If a supplier is missing bank details and has pending invoice/s under *Processing>Supplier Payments* screen, you'll see a warning message "Missing Payment Details" for the invoice/s until bank details are added.

   You'll still be able to view and report on historical cheque payments, cancel existing cheques and receipt any cheque payments received from other banks. We'll also be removing redundant cheque-related settings over time, but this won't impact you.

   - Lot refunds **–** When processing a lot owner refund under *Processing>Adjustments>Lot Refunds*, you'll now only see one refund type available being 'Direct'.
   - Supplier payment methods – When viewing and editing a supplier's payment method under *Supplier card>Settings>Payment Method*, you'll now only see 'BPAY' and 'Direct' available for selection. If you have the user permission to edit supplier payment details and have not yet added new payment details against an existing supplier, you'll see a popup message to remind you to enter details when you're editing the supplier card.

BUDGETS

2. **System remembers user selections to budget report options** – The system will now remember your selections to report options and header dates when printing/exporting a standard budget report, so that you don't have to re-select them each time you print/export the report.

   For example, it'll remember changes to report content inclusions, grouping accounts, levy year vs financial year, include estimated closing balances and report header dates.

   This means the budget report content will remain consistent when generating multiple reports during the drafting process. *Note: This change does not yet apply to BMC budgets.*

3. **Accepting a budget will generate accepted budget report** – When accepting a budget using the 'Accept budget' workflow, the system will now automatically generate an Accepted Budget Report and save it to building documents for record purposes. This occurs when accepting both standard budgets and BMC budgets.

4. **New global Contacts menu** – You can now view and manage contacts within a new global menu *File > Contacts*.
    - The Contacts menu is the foundation for more existing changes planned, that will help you manage lot owner information, lot representatives, multiple co-owners and delivery preferences in a more efficient way, all in one place. You'll hear more about this soon!
    - For now, from the Contacts menu you'll see contacts that already exist in your PropertyIQ that are currently being used in the following places:
        - Building card > Selecting a contact for Onsite Manager under Settings tab.
        - Building card > Selecting a contact for Caretaker under Settings tab.
        - Insurance claims & Work Orders > Selecting a contact as an additional recipient during distribution under the Recipients tab.
        - Access Register > Selecting a contact during 'sign out' process.

    Refer below screenshots.

5. **New Contacts user permissions –** With the introduction of a new menu for Contacts, you'll also see new user permissions that will control who can view, add and edit contacts.
    - New permission set in User Roles: Located under the existing permissions for Lots, there's a new row for Contacts with *View*, *Add* and *Edit*.
        - **View**: Ability to view the details on a contact and view the list of contacts.
        - **Add**: Ability to add a new contact.
        - **Edit**: Ability to edit the details on a contact, deactivate/activate a contact.
    - Default Contact permissions for existing Roles: By default, the Contacts permissions have been defaulted to the same values that are used for the Lots permissions within the same role. You can change permissions at any time under *Utilities>Security>Roles*.

    Refer below screenshot.

What you need to do

- Review and edit the new user permissions for Contacts under *Utilities> Security> Roles*.
- By default, the Contacts permissions have been defaulted to the same values that are used for the Lots permissions within the same role.

UTILITY LEVY TEMPLATES

6. **New merge fields for utility levy templates** – New merge fields are available for utility levy templates for Electricity, Gas, Water and Other Utility Notices. You can manually add these new merge fields to your existing templates where required.
    - Tariff: A new field {{Tariff_Avg_Cents_Per_Unit}} will populate the amount calculated under *Billing>Utilities Levies* in the *Avg Cents per Unit* field. Formatted as currency e.g. $10.00.
    - Arrears: A new field {{Arrears_Amount}} will populate the total arrears balance of the Lot (Arrears + Interest) and match the value shown under *Lot card>Ledger>Balance*. Formatted as currency e.g. $10.00.
    - Note that the {{Credit_Amount}} merge field already exists for these templates.
7. **New default utility levy templates** – The default templates for Electricity, Gas, Water and Other Utility Notices have been updated to include the new merge fields. You can access the new default templates using the *+Add* button under *File>Templates*.

SUPPLIER PAYMENTS

8. **Handing of Net $0.00 supplier payments** – When an invoice AND a credit note of equal value are processed in the same payment run (resulting in a supplier payment of Net $0.00), the system will now automatically exclude the related invoice & credit note line items from the payment file/s created to avoid any errors when uploading the payment file/s to Macquarie Bank.

API & CONNECTIVITY

9. For our existing public API endpoint for Get/Lots, there's a new field available called 'legalNote' that will provide any legal action notes for the lot.
10. For our existing public API endpoint for Get/Buildings, we now have more information related to Schedules.
    - Where the 'schedule' parameter has been included in the Get/Buildings call, it'll now return the 'scheduleId' related to each schedule in the building.
    - Where the 'committeeMember' parameter has been included in the Get/Buildings call, it'll now return the 'scheduledId' for the schedule the committee member is linked to, allowing you to identify which committee members are related to which schedule.

NOTE: For clients and third-party providers using PropertyIQ public APIs, please contact us if you need an updated copy of the PIQ API documentation at support@propertyiq.com.au.

11. **Default screen filtering for Work orders and Insurance claims**
    - Work orders: To improve the user experience on *To Do>Work Orders* screen, we've changed the default filter view so you'll no longer see items in the list that are closed, cancelled or completed. You can still see these at any time by selecting the relevant filters at the top of the screen.
    - Insurance claims: To improve the user experience on *To Do>Insurance Claims* screen, we've changed the default filter view so you'll no longer see items in the list that are withdrawn, declined or completed. You can still see these at any time by selecting the relevant filters at the top of the screen. You'll also no longer see claims for inactive buildings in the list.
12. **Financial reporting** – An issue has been fixed that related to incorrect transaction dates being used on some ledger account entries, specifically for a levy that is paid in advance and its due date falls in the next financial year. It was using receipt date instead of levy due date, even after the levy fell due. Once the levy due date has passed, the financial reports will now correctly use the levy due date in relevant ledger accounts entries to ensure accurate financial reporting.
13. **Changes to committee email incorrectly updating Lot** – An issue has been fixed that was introduced in July 2024 release, where changing the email address of a committee member who's also a lot owner, would also update the email address on the lot card. This was happening even when 'Sync with lot owner' option was turned off.

    NOTE: We're currently working on investigating and reverting any incorrect changes and will contact any affected clients separately with more information.
14. **BAS Re-processing** – An issue has been fixed where re-processing BAS for a building/schedule was not deleting the records related to the previously run BAS (BAS snapshot, report, journals, deposit slip/invoices) and was inadvertently duplicating the records. In these instances, you can still delete any previous duplicate records using the 'Delete' function under *BAS History & Lodgements* screen.

PROPERTYIQ PORTAL

ACCESSIBILITY ENHANCEMENTS

Recognizing that 1 in 6 Australians have a disability that makes accessing online information a challenge, we've implemented a new, easy-to-read design for improved readability and navigation.

This is the first step in our commitment to making the portal accessible to all users.

CHANGES TO WHEN MEETINGS DISPLAY ON MEETINGS PAGE

Only meetings with generated notices will now be visible on the portal under the *Meetings* page. This means that Owners and Committee Members only see relevant information and receive portal meeting notifications when they're supposed to. This ensures that any meetings still in preparation or drafting phase will not be displayed in portal.

Important note

- With this change, any meetings currently visible on Portal that **do not** have meeting notices generated will be removed from the *Meetings* page.

IMPROVED USER EXPERIENCE

We've made some changes to improve the user experience and prepare for upcoming changes to *My Profile* page that'll include viewing delivery preferences for correspondence.

- A new footer provides easy access to policies and guides.
- Mobile navigation has been streamlined with a cleaner hamburger menu.
- The 'last updated' date for the portal is now displayed on individual pages.

GENERAL

- An issue has been fixed that prevented the resend of activation emails to Strata Manager Admin users who were using the same email as their PropertyIQ login email.
- An issue has been fixed relating to entering verification codes during password reset, where copying and pasting the code with a space resulted in errors.

ITEM 4 – NEW GLOBAL 'CONTACTS' MENU

You can now view and manage contacts within a new global menu *File* > *Contacts*.

- The Contacts menu is the foundation for more existing changes planned, that will help you manage lot owner information, lot representatives, multiple co-owners and delivery preferences in a more efficient way, all in one place. You'll hear more about this soon!
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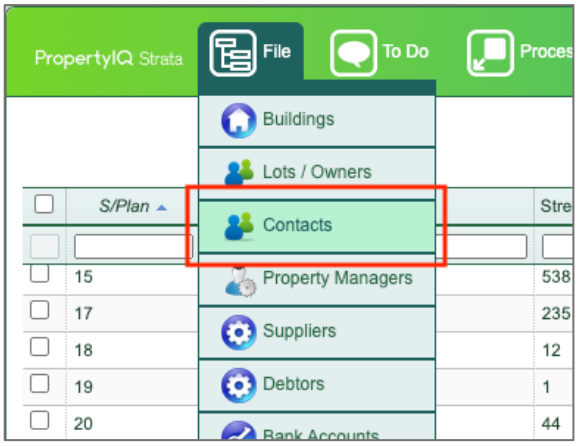
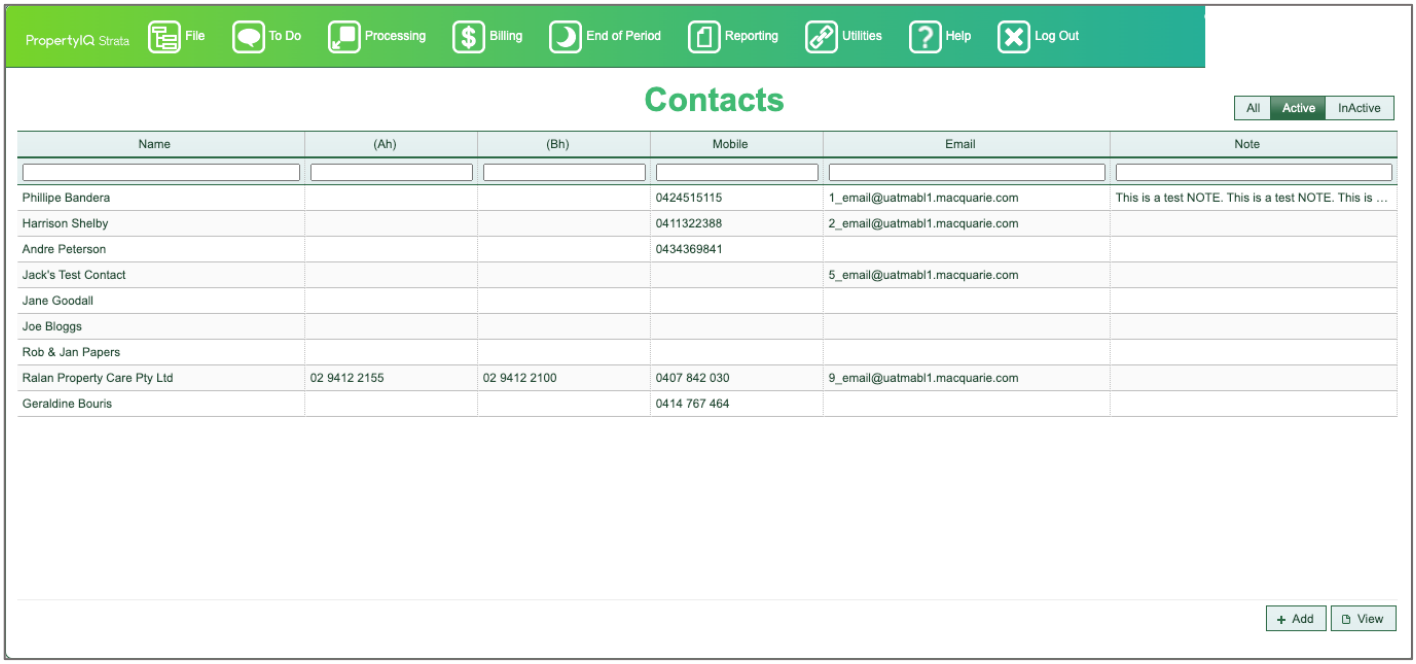
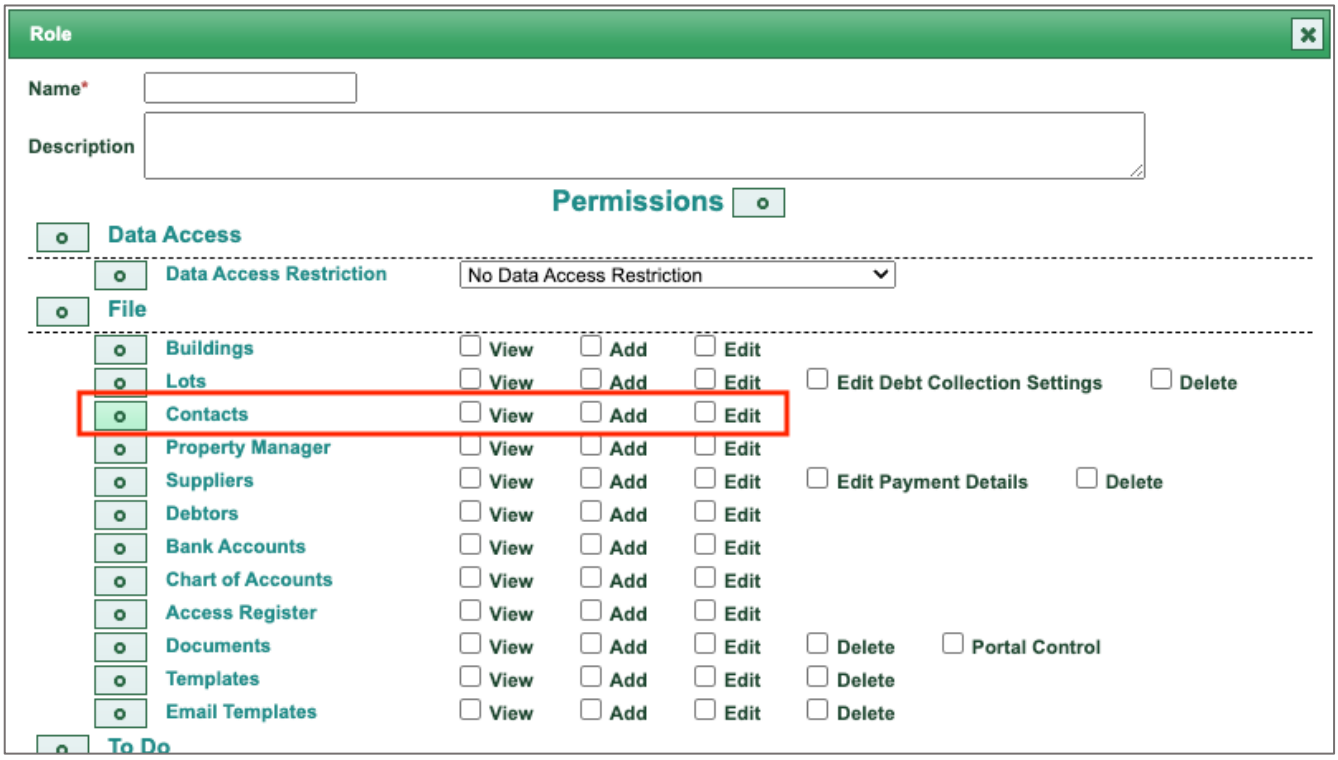




ITEM 5 - NEW CONTACTS USER PERMISSIONS

With the introduction of a new menu for Contacts, you'll also see new user permissions that will control who can view, add and edit contacts.

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