PropertyIQ™

Templates - standard, custom and email

CONTENTS

INTRODUCTION TO TEMPLATES

Templates allow you to create and edit document templates that are utilised for functions where documents need to be sent from PropertyIQ. For example, levy notices, general correspondence, meeting notices, information certificates, covering emails.

There are four types of templates in PropertyIQ

- Standard Merge
- Custom Merge
- Standard Email
- Custom Email (not in use)

STANDARD MERGE DOCUMENTS

These are system default forms and notices used by PropertyIQ and include:

- Meeting Notice Cover Sheets
- Meeting Minutes Cover Sheets
- Information Certificates
- Due Notices
- Arrears Notices
- Final Notices
- Legal Notices
- Special Levy Notices
- Debtor Invoices
- Utility Invoices
- Work Orders

CUSTOM MERGE DOCUMENTS

This is where you can create optional custom forms and notices used for correspondence and documents and include:

- General lot owner correspondence
- Cover sheets for reports/notices
- Insurance claims
- Access register sign out document

STANDARD EMAIL TEMPLATES

These are covering emails for system generated documents. You should review and update these prior to emailing any system generated documents e.g. levy/fee notices, meeting notices, financial reports and documents.

The types are:

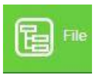
- Annual Levy Notice
    - Used for an annual levy notice is emailed to lot owners. Generated if you've ticked to send annual levy notices in your Application Settings.
- Arrears Notice
    - Used when emailing an arrears notice from the Due Notices screen.
- Custom Template –
    - Used when using the merge letter function from the lots owner screen or when sending documents from the building card, lot owner card, supplier card, work order card, meeting or insurance claim card.
- Debtor Invoice
    - Used when emailing a debtor invoice from the Debtor Transactions screen or Utility Debtors Invoices screen.

- Debtor Statement
  - Used when emailing a debtor statement from the Due Notices screen.
- Due/Fee Notice
  - Used when emailing a levy/fee instalment notice from the Due Notices screen.
- Final Notice
  - Used when emailing a final levy notice to a lot owner from the Due Notices screen.
- Financial Reports
  - Used when emailing financial reports to committee members and financial report recipients.
- Insurance Claim
  - Used when emailing an insurance claim document to recipients from the insurance claim card.
- Invoice Approval
  - Used when emailing an invoice for approval to committee members that are ticked as external approvers.
- Legal Notice
  - Used when emailing a legal notice to a lot owner at the final stage of levy arrears from the Due Notices Screen.
- Meetings Minutes Notice
  - Used when emailing meeting minutes to lot owners, committee members and meeting recipients.
- Meeting Notice
  - Used when emailing meeting notices to lot owners, committee members and meeting recipients.
- Remittance Advice
  - Used when emailing a supplier a payment remittance advice as part of a Supplier Payment run.
- Request for Tender
  - Used when emailing a supplier a quote/tender request from the Work Orders screen.
- Special Notice
  - Used when emailing a special levy/fee notice to lot owners from the Special Levies screen.
- Supplier Compliance Expired
  - Automatically generated and used if you have enabled the ‘supplier compliance expired’ email in the Settings>Supplier Compliance tab.
- Supplier Compliance First Reminder
  - Automatically generated and used if you have enabled the ‘supplier compliance first reminder’ email in the Settings>Supplier Compliance tab.
- Supplier Compliance Second Reminder
  - Automatically generated and used if you have enabled the ‘supplier compliance second reminder’ email in the Settings>Supplier Compliance tab.
- Utility Notice
  - Used when emailing a utility notice from the Utility Levies screen

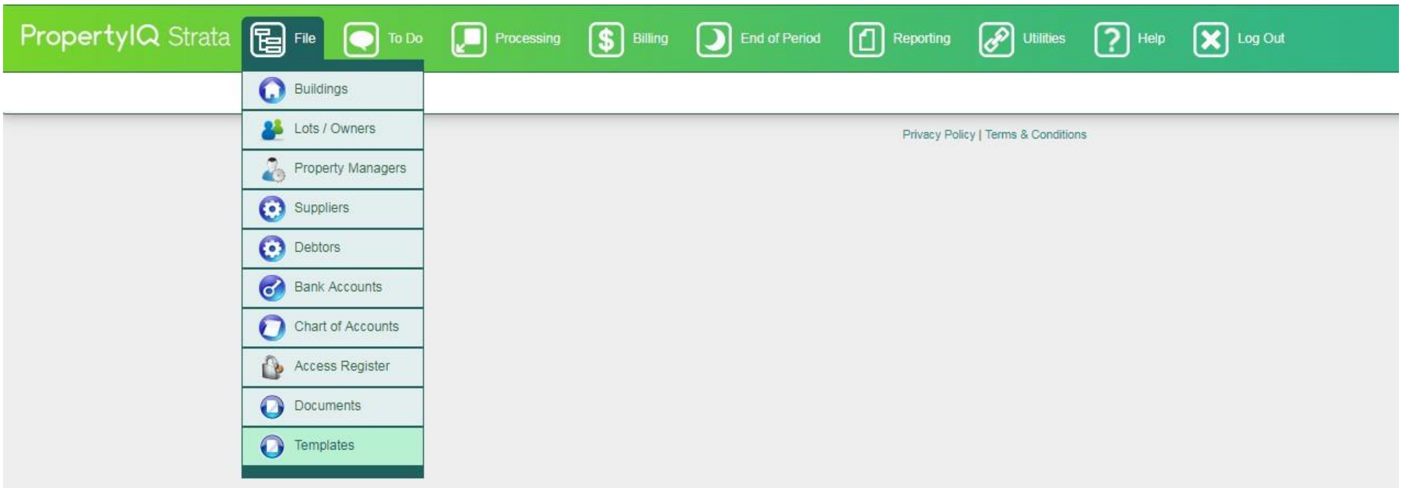
CUSTOM EMAIL TEMPLATES

Custom email templates are not currently available - this tab is for future development.

GETTING STARTED

To access the template editor, go to 

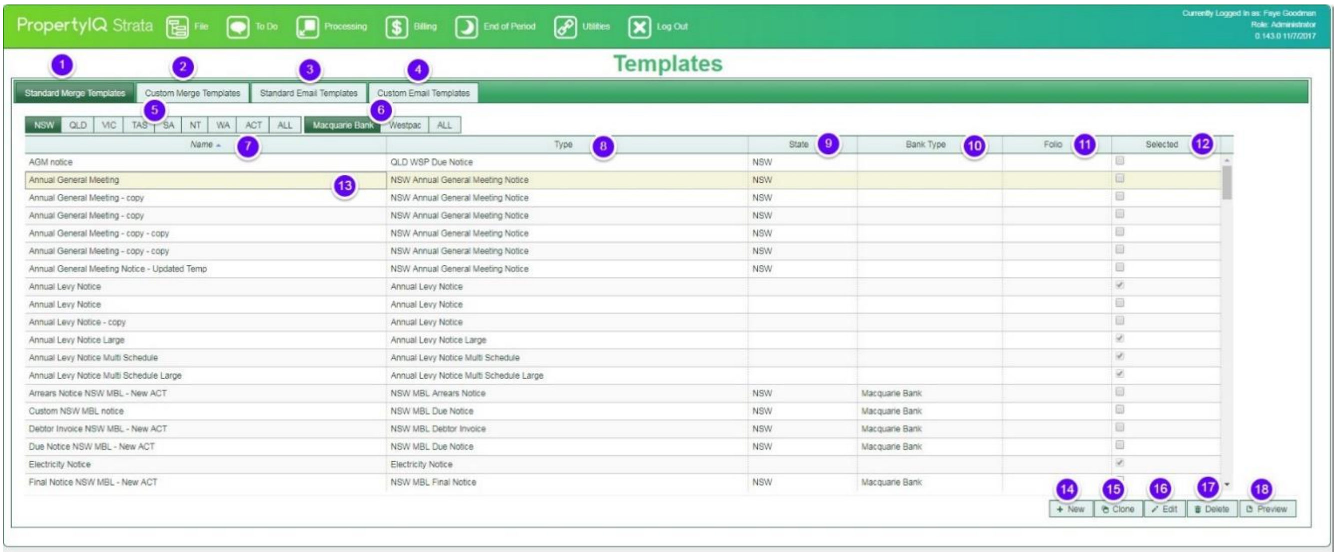
and select *Templates*



TEMPLATE EDITOR SCREEN

1. Standard merge template tab shows all standard merge templates
2. Custom merge template tab shows all custom merge templates
3. Standard email template tab shows all standard email templates
4. Custom Email Template tab is not yet developed
5. Most templates are specific to your state, as legislation requires different formats. You can click on the tabs to toggle your view to your state's templates
6. Some templates are specific to your bank, for example levy notices which include payment instructions. You can click on the tabs to toggle your view to your bank's templates.
7. The name of the template shows in this column
8. The type of template shows in this column
9. The state this template is specific to shows in this column (if applicable)
10. The bank this Template is specific to shows in this column (if applicable)
11. If you use folios, you can nominate the folio this template is to be used for and the folio it is attached to shows in this column
12. Tick in this column to select the template you want to use for each type of notice. For example, you need to choose one layout for annual levy notices, another for annual general meeting notice etc.
13. Click on a template to highlight it on the screen
14. Click +New to create a new template from a blank document
15. Click Clone to clone an existing document. Cloning allows you to utilise the existing template as a base for creating a new template. You can than save the cloned template when you are ready.
16. Click Edit to edit an existing template. Edits you make from this screen will affect the Global (base) template
17. Click Delete to delete an existing template.

    NOTE You can't delete a template that has been selected as the default for a particular action (has a tick in the Selected column).
18. Click Preview to preview a template. This opens the document as a PDF in a new tab



Templates that were created in the early development of PropertyIQ have no margins and use text boxes instead. You can convert your old templates to the new format when you are ready, but you do not have to do so. See the section below in this manual "Converting multi page templates from using textboxes to using pages".

STANDARD MERGE TEMPLATES

When you onboard with PropertyIQ, generic standard templates will be pre-installed for some forms, but you should always check these before issuing and make amendments if required.

if you want to customise your standard merge templates, it is always recommended that you ***use the Clone option***, rather than creating a new template so you have the original template for reference if you need it.

- All payment notices – Annual Levy Notices, Levy/Fee Due Notices, Arrears Notices, Final Notices, Legal Notices
- Debtor Invoices
- Information Certificates
- Work Orders
- Utility Invoices

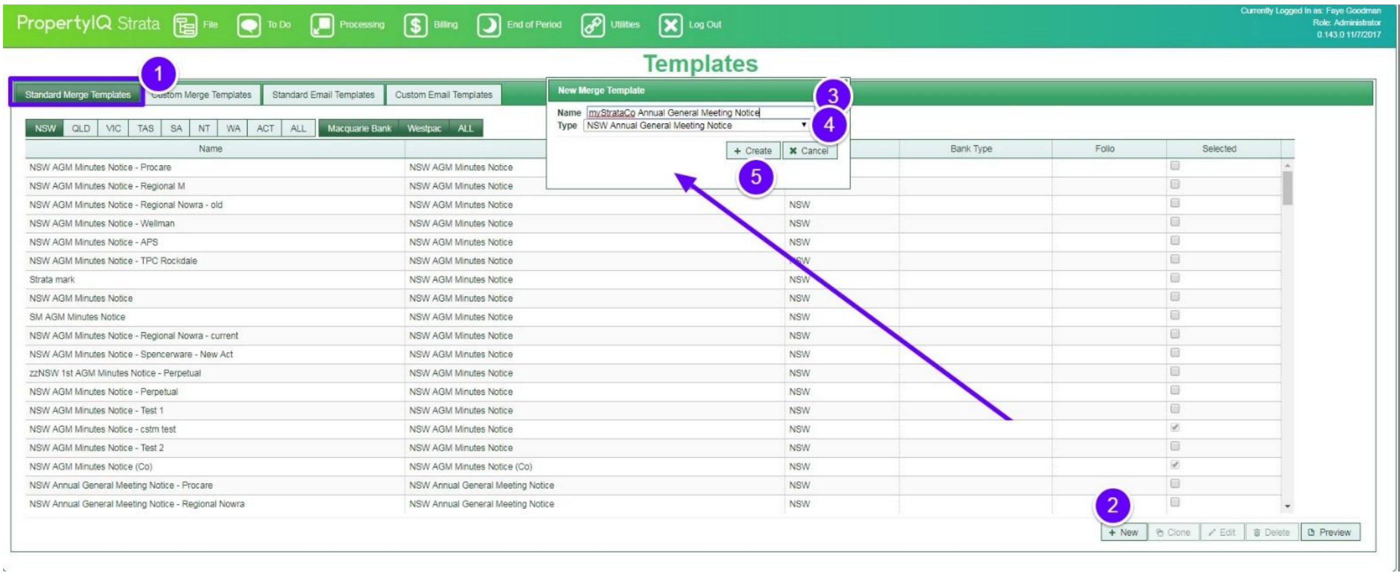
Your payment notice templates – Annual Levy Notices, Levy/Fee Due Notices, Arrears Notices, Final Notice and Legal notices need to be checked for format to ensure your lot owner's DEFT reference number is showing correctly. Your customer success manager will assist you with this during onboarding or you can email support@propertyiq.com.au for assistance.

You will need to create new Standard Merge Templates for:

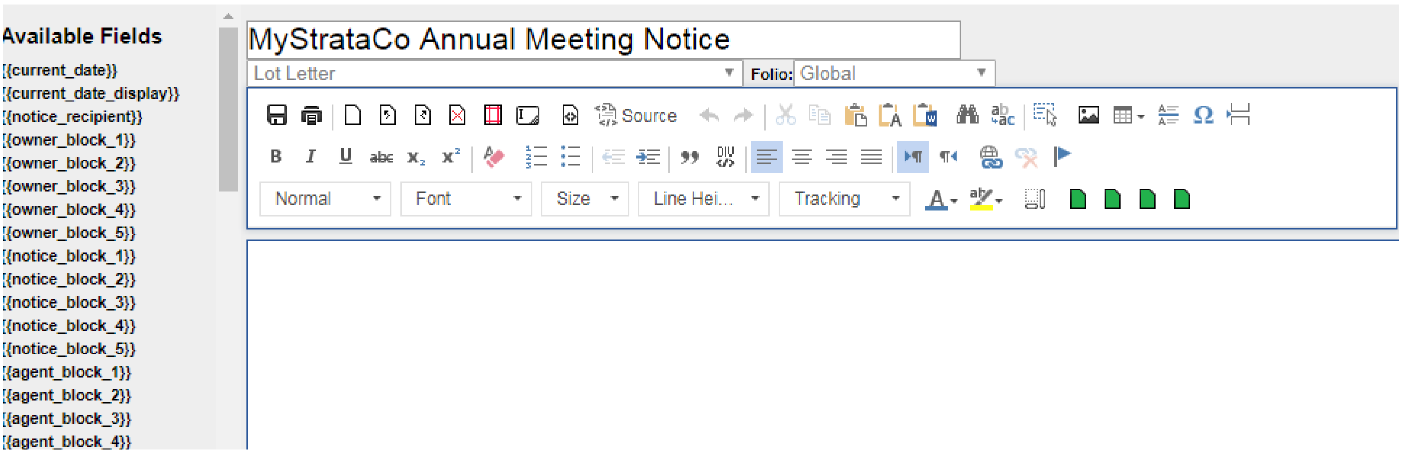
- Meeting Notices – Front Page(s)
- Meeting Minutes - Front Page(s)

CREATING A NEW STANDARD MERGE TEMPLATE

1. From the Templates screen, go to the *Standard Merge Template* tab
2. Click on the +New button
3. Type a name for your new template
4. Select the type of template from the dropdown list
5. *Create*



Now you can create your template. For detailed instructions on editing, see the section below in this manual – "Editing Functions"



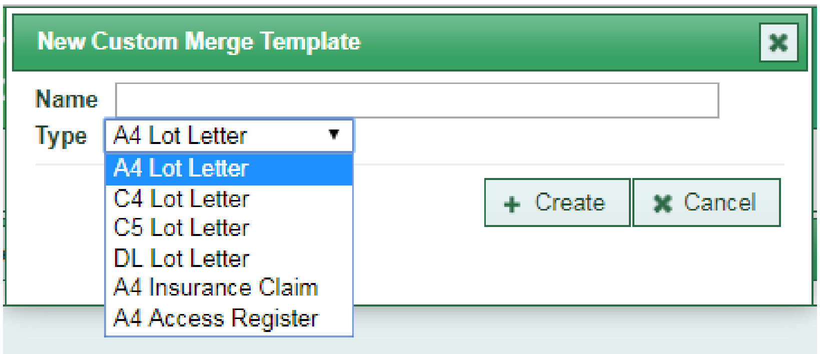
CUSTOM MERGE TEMPLATES

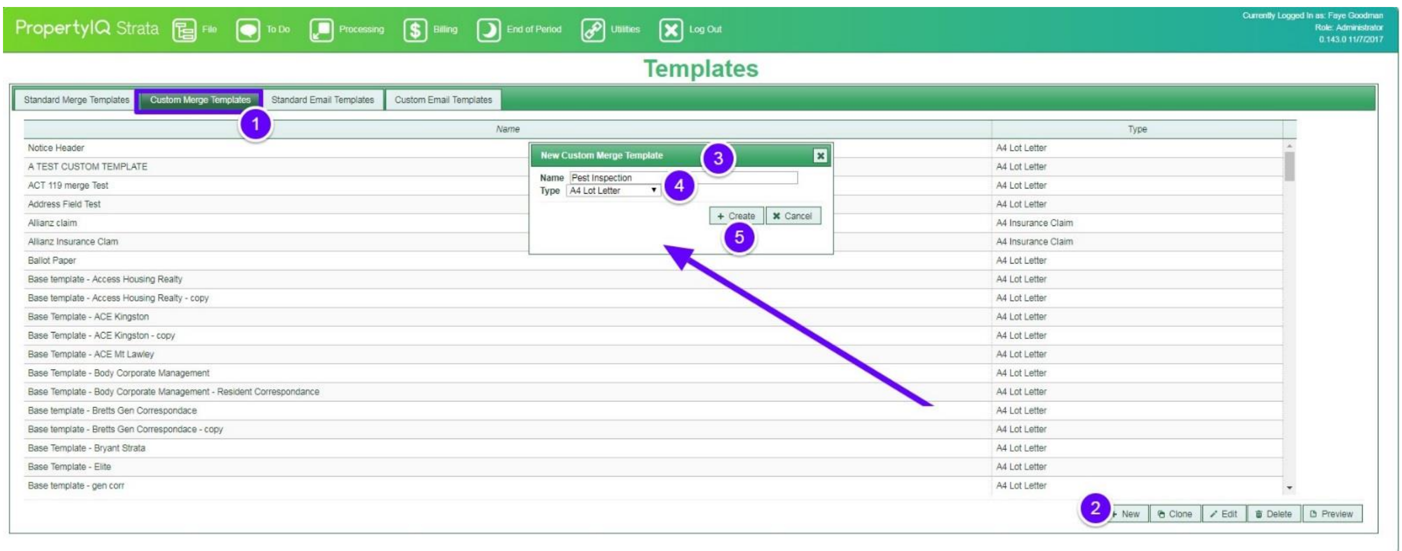
You will need to create a Custom Merge Template for:

- Insurance claim form(s) that you use for merging when you submit a claim to an insurer
- Access register document(s) - used to record details when you sign a key out of your office from the access register
- General correspondence to lot owners and committee members
- Cover sheets for items like levy notices, financial reports

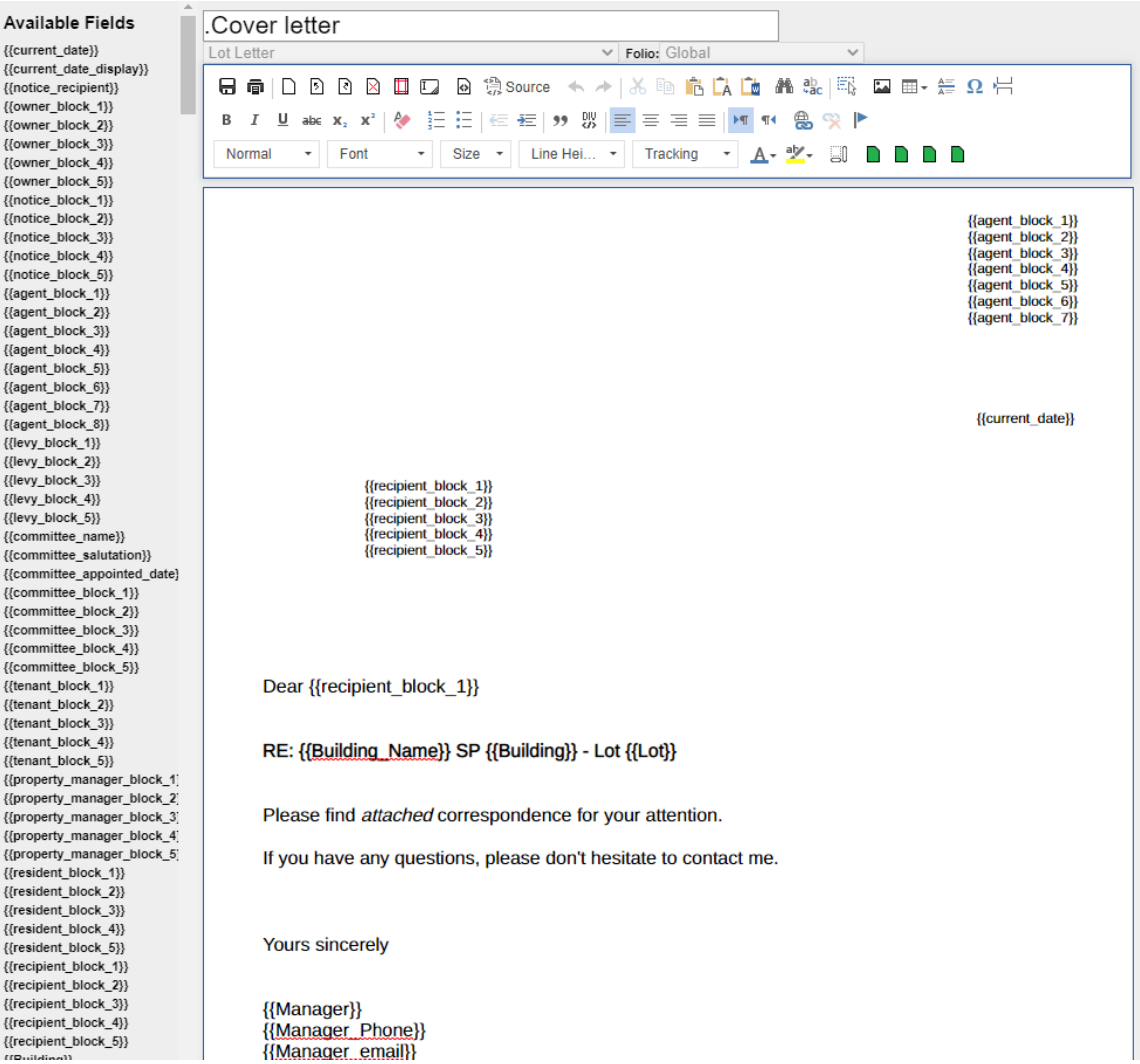
ADDING A CUSTOM MERGE TEMPLATE

1. Select Custom Merge Templates
2. Select *New* from the bottom right of the template screen
3. Enter a name for your new template
4. Select the type (size) from the dropdown menu. The choices are:
    i. A4 – Page size 210 x 297 mm
    ii. C4 - Envelope Size 229 x 324 mm
    iii. C5 – Envelope size – 162 x 229mm
    iv. D4 – Envelope size – 220 x 110 mm
    v. A4 Insurance Claim – page size 210 x 297 mm. This is the default document used when you click merge from an insurance claim to generate a claim document
    vi. A4 Access Register – page size 210 x 297 mm. This is the default document used when you click on Pickup Request when signing out an access item.
5. Select *Create*





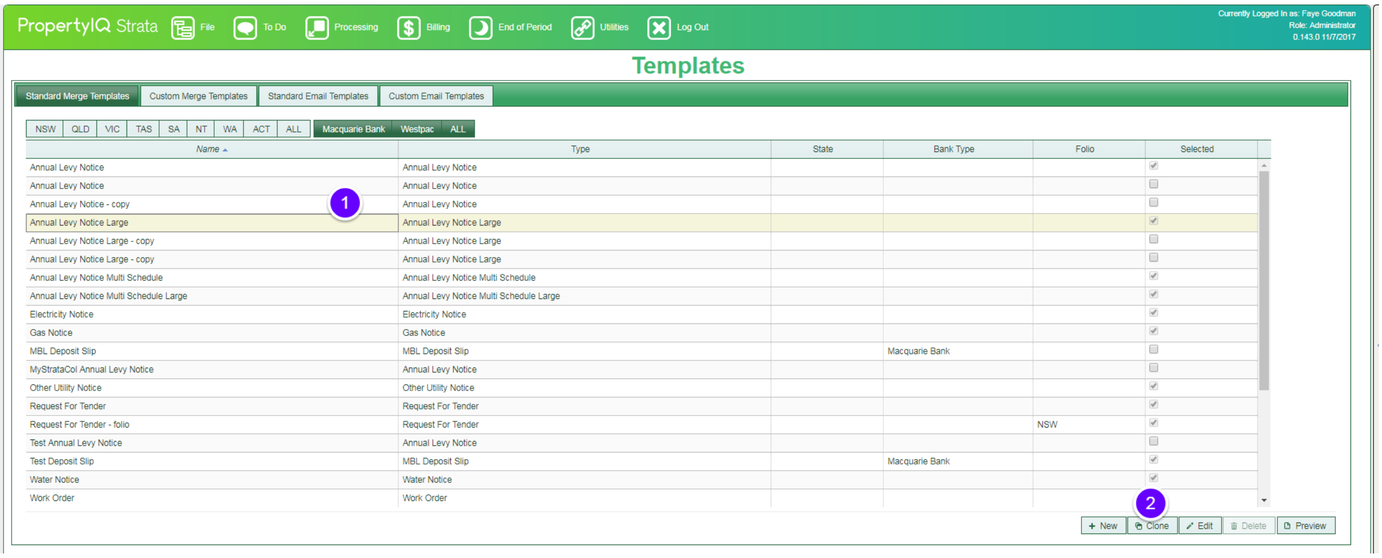
Now you can create your template. For detailed instructions on editing, see the section below in this manual – Editing Functions



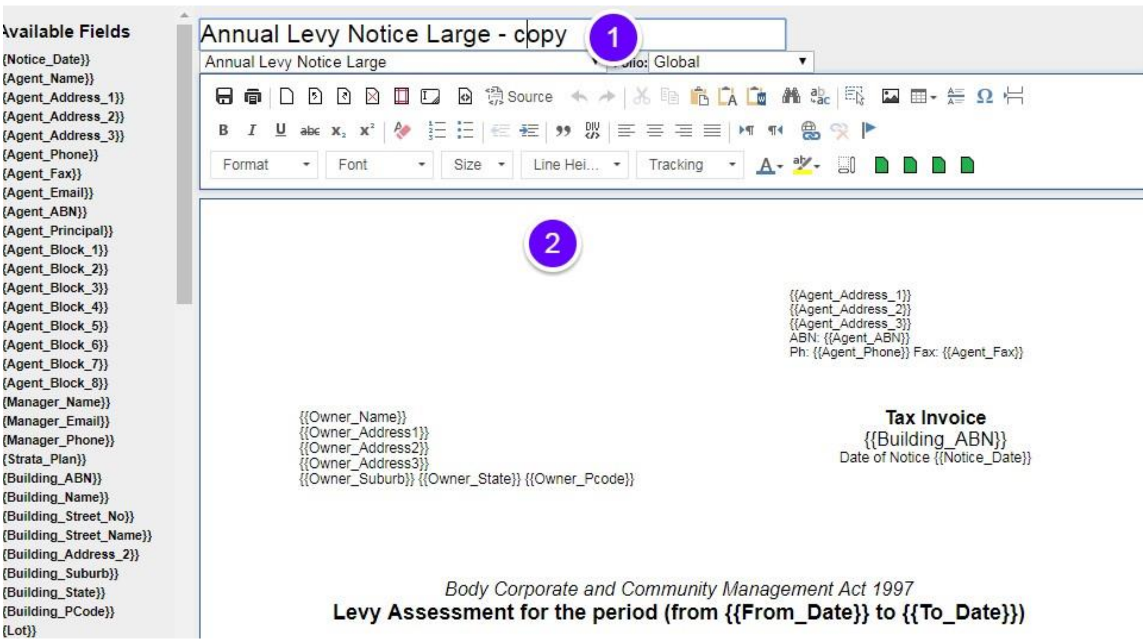
CLONING A MERGE TEMPLATE

You can follow the same procedure for both Standard Merge Templates and Custom Merge Templates

1. Highlight the template you want to clone on the screen
2. Select *Clone*



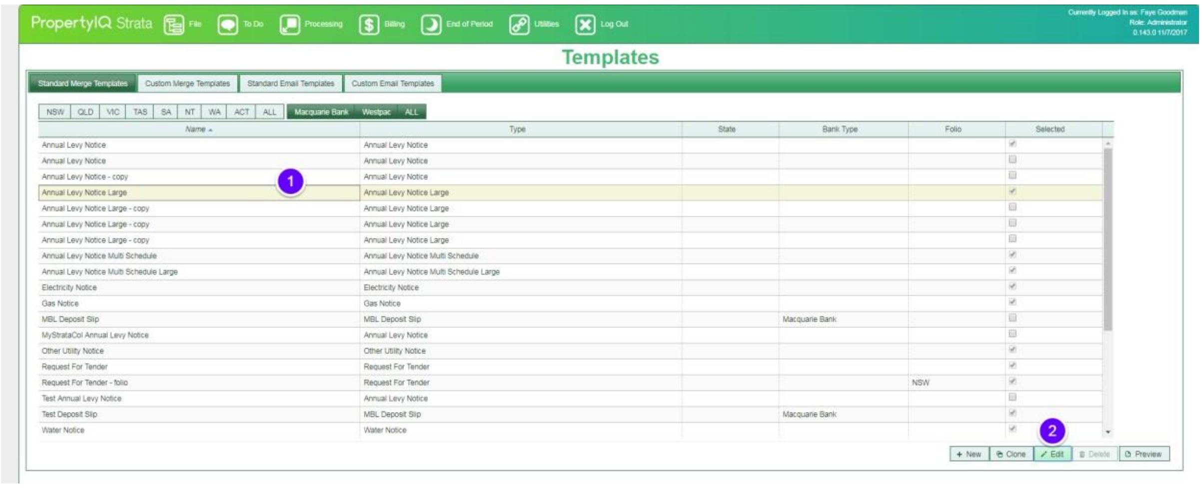
1. Enter a name for your new Template
2. Edit the template to suit. For full details on editing, see the section below in this Manual – Editing functions



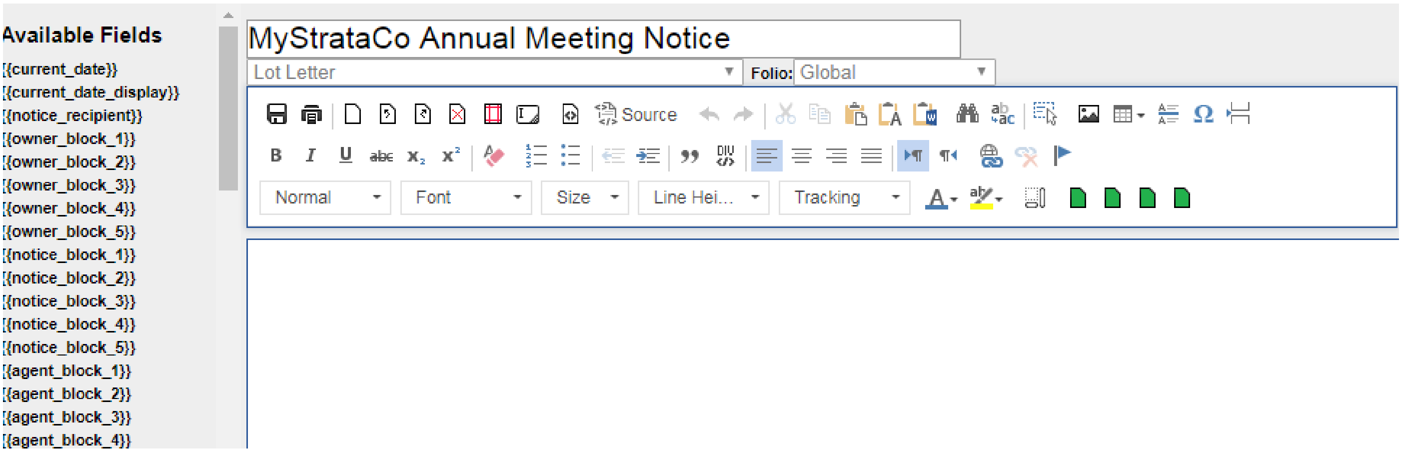
EDITING A MERGE TEMPLATE

You can follow the same procedure for both Standard Merge Templates and Custom Merge Templates.

1. Click on a template to highlight it
2. Click on the Edit button



1. This edits the existing template
2. Enter your changes here. For full details on editing see the *Editing Functions* below

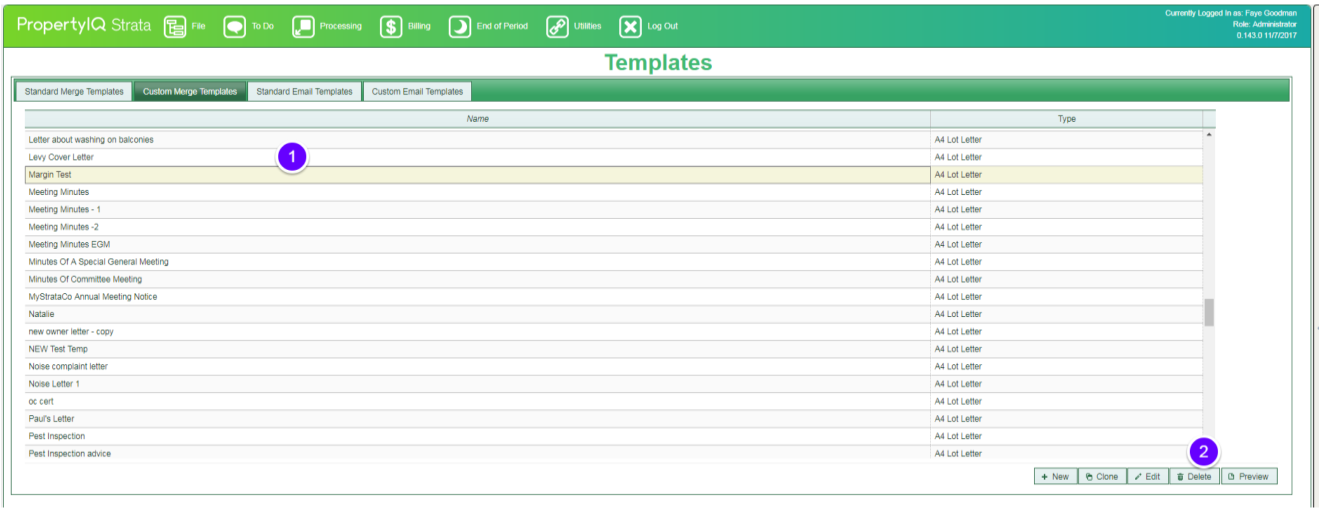


DELETING A MERGE TEMPLATE

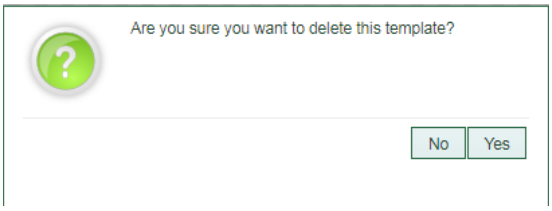
You can delete a Custom Merge Template and you can delete a Standard Merge Template if it's not selected as the default for a particular function.

This should be done with caution as you cannot retrieve a deleted template.

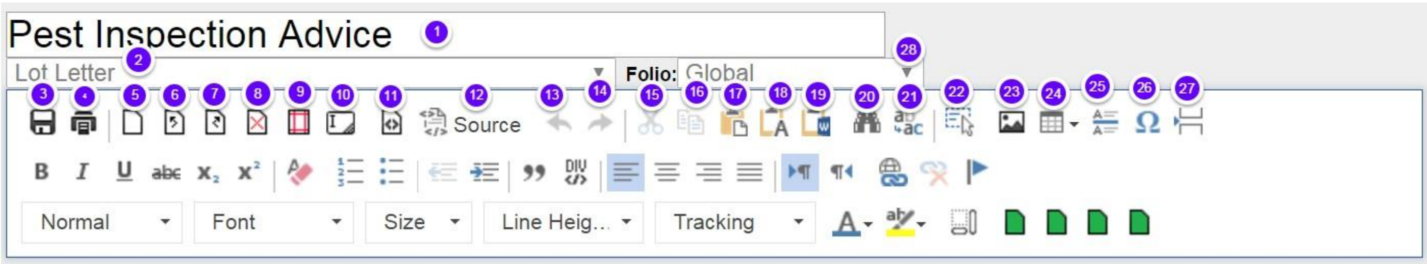
1. Highlight the Custom Merge Template you want to Delete
2. *Delete*



Yes to confirm you want to proceed.



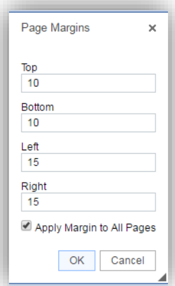
Hover your mouse over the icons to see what their name/function is



1. The name of the template shows here – you can overtype if you want to change it
2. The type of document shows here – in this case, Lot Letter
3. Save – click here to save your template
4. Preview – click here to create a preview of your template
5. Add Page – add a new blank page
6. Insert Page Before – insert a page before the current page
7. Insert Page after – insert a page after the current page
8. Delete Current Page
9. Set Page Margins

NOTE

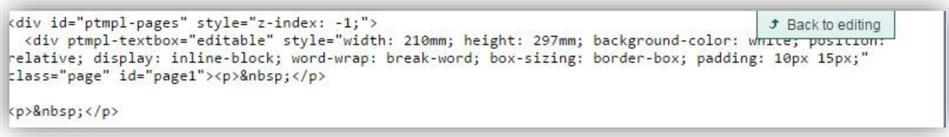
Margins in PropertyIQ are set in pixels. The table below shows conversions from centimetres to pixels.



Type your page margins, tick the box if you want to apply to all pages in the template and click OK

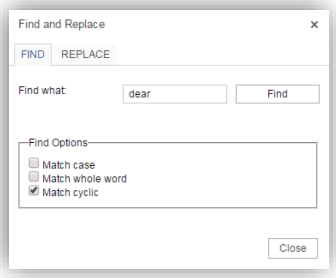
	Word				PIQ			
	Top	Bottom	Left	Right	Top	Bottom	Left	Right
Normal	2.54cm	2.54cm	2.54cm	2.54cm	95px	95px	95px	95px
Moderate	2.54cm	2.54cm	1.91cm	1.91cm	95px	95px	72px	72px
Narrow	1.27cm	1.27cm	1.27cm	1.27cm	48px	48px	48px	48px
Wide	2.54cm	2.54cm	5.08cm	5.08cm	95px	95px	192px	192px

10. Add a text box
11. View source – This will show the whole document in HTML language. This is used when creating web pages but isn generally needed for document templates. Click on the *Back to Editing* to go back to editing



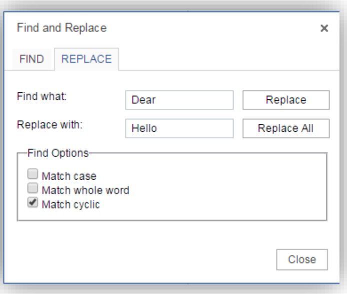
12. Source – This will show the area of template that is highlighted in HTML. This is used when creating web pages but isn’t generally needed for document templates. Select *Back to Editing* to go back to editing

13. *Undo.* Use this to undo unsaved changes
14. *Re-do*. Use this to reverse any changes you have undone using the Undo button
15. Cut function. Use this to cut a selected item/area of text from the template that you can paste later
16. Copy function. Use this to copy an item/area of text from the template that you want to paste elsewhere.
17. Paste function. Use this to paste an item/area of text that you have previously cut or copied
18. Paste as plain Text. Use this to paste an item you have previously cut or copied and remove the formatting
19. Paste from Word. Use this function to paste items/areas of text that you have copied from a Word Document. This function will give you the closest formatting to Word formatting possible.
20. Find/Replace. Use this function to find a word or phrase in the text and use the replace function to replace all instances of the the word or phrase with the new word/phrase



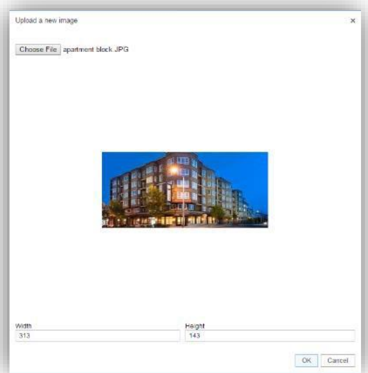
Type the word or phrase you want to Find and tick the options

21. Replace



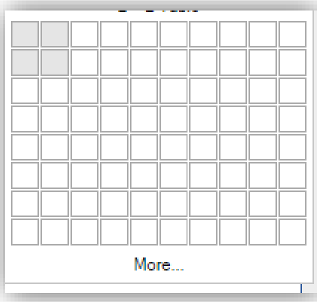
Type the word or phrase you want to replace, type the word or phrase you want and tick the options

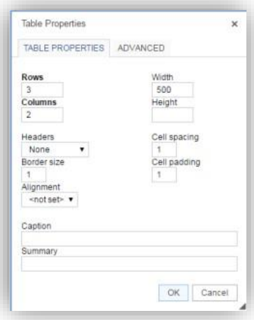
22. Select all – use this to select the entire document
23. Insert an image

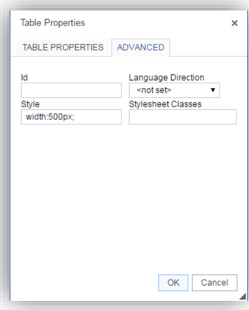


Click on Choose file, find the image file you want. Type new width and height dimensions if you want and click Ok to insert the image

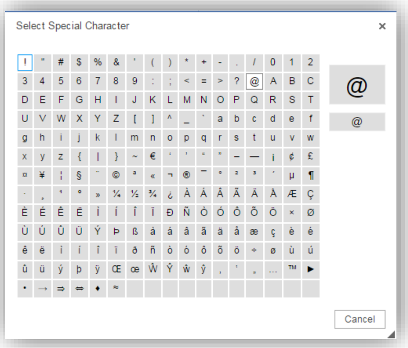
24. Click to insert a table, drag your mouse across the squares to create a simple table or click on more and type the details. Click on the Advanced tab to set ID, styles, language and stylesheet classes.





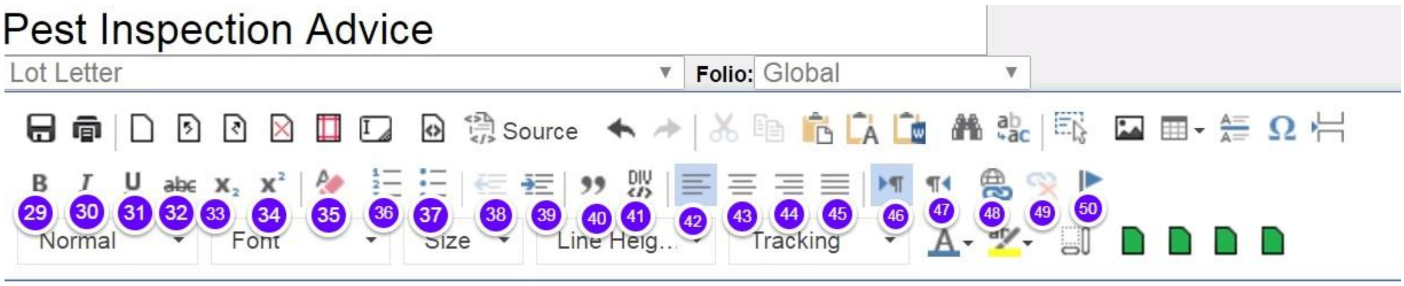


25. Insert horizontal line- Use this function to insert a line across your template
26. Insert a special character

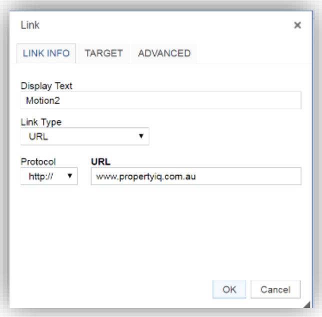


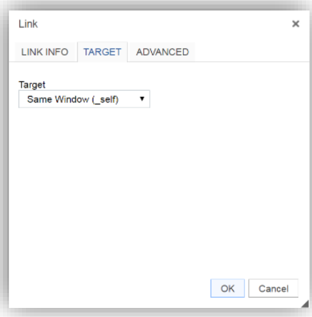
Click on the special character you want to insert.

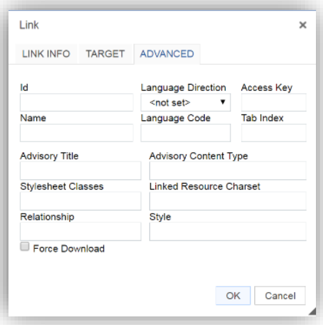
27. Insert a page break for printing
28. All custom templates are global documents (for all folios)



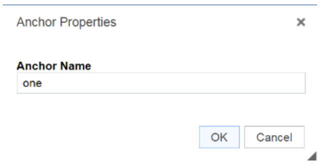
29. Bold function – use this to make your text bold
30. Italics function – use this to make your text Italic
31. Underline function – use this to underline your text
32. Strikethrough function – use this to create strikethroughs on your text
33. Subtext function – use this to create subtext e.g. Motion$_1$
34. Supertext function – use this to create supertext e.g. Motion^2
35. Remove format – use this function to remove a format that you have applied
36. Numbering – use this format to create a numbered list
37. Bullets – use this format to create a bulleted list
38. Decrease indent – use this function to decrease an indent you have made
39. Increase indent – use this function to increase an indent you have made
40. Insert a block quote – inserts a block text. This is generally a HTML function and not needed for a document.
41. Create Division Container. Use this to create a column or division in your template. A division creates a block (similar to a paragraph) but allows you to right click and add custom styles to it. Usually used for Websites and not generally needed for documents
42. Align left – use this function to align selected text to the left margin
43. Align centre – use this function to centre selected text between the margins
44. Align right – use this function to align selected text to the right margin
45. Justify – justify the text between the margins
46. Text direction left to right – sets text to flow from left to right
47. Text direction right to left – sets text to flow from right to left
48. Insert link – This creates a hyperlink in HTML format so the document recognises a link to an email or website

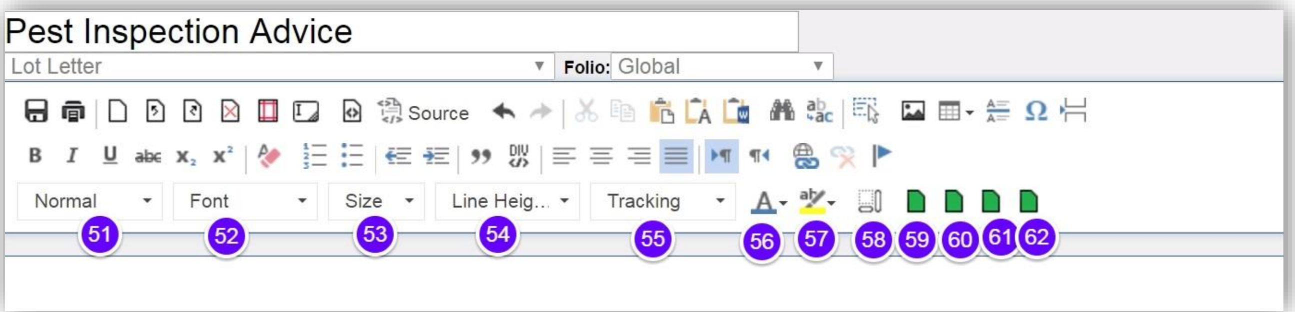




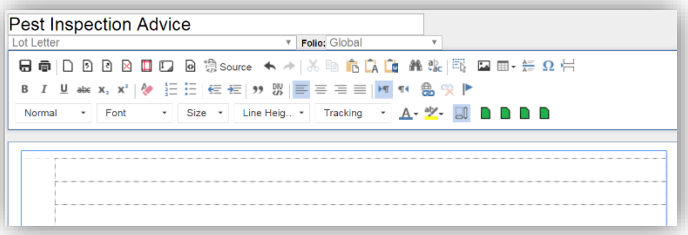


49. Unlink – use this function to unlink a link you have created
50. Create Anchor – An anchor is used for marking a specific part in a webpage.





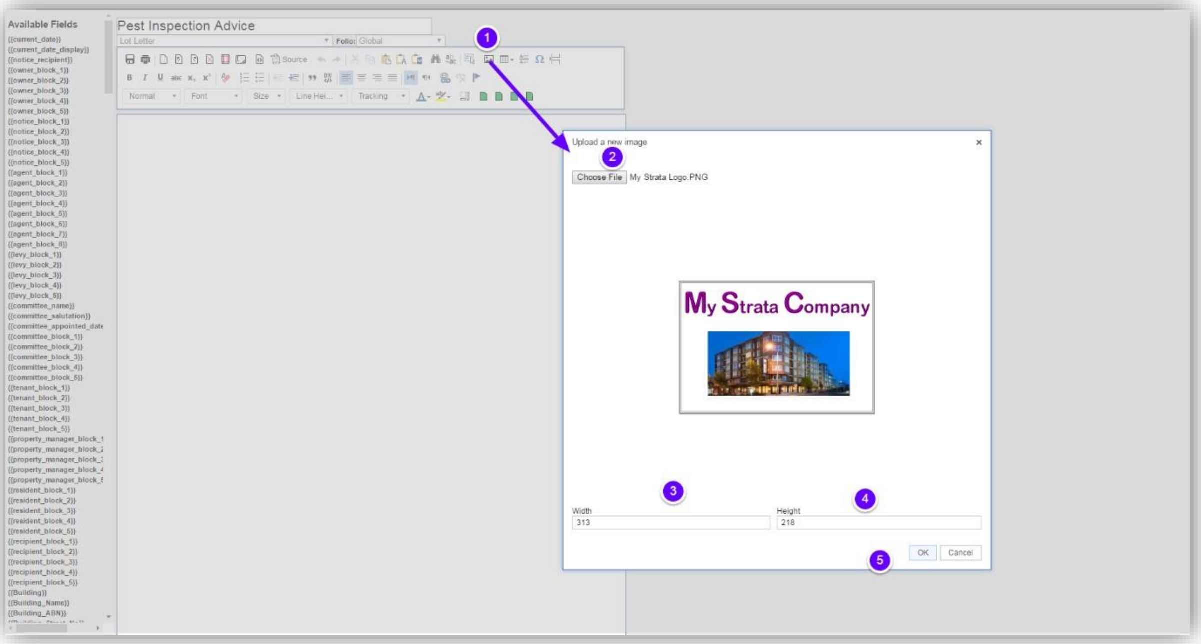
51. Use the dropdown list to select a format for your text – Heading types or normal
52. Use the dropdown list to select a font
    Fonts listed with (**) or (*) are not supported when previewing or printing PDF documents. However, there are replacement (similar/substitute) fonts available which are shown on the list.
53. Use the dropdown list to select the size of your text
54. Use the dropdown list to select the line height
55. Letter spacing plugin – Use this to set a consistent degree of increase or decrease of space between letters. This will affect the density in a line or block of text.
56. Use the dropdown list to select a font colour
57. Use the dropdown list to select a text highlight colour
58. Show Block – show block information, will show all the 'divisions/paragraphs' on the page so you can see where a single paragraph starts and ends



59. Set page size to A4
60. Set page size to DL
61. Set page to C4
62. Set page size to C5

INSERT AN IMAGE OR LOGO

1. Insert an image or logo by clicking on the Image icon
2. *Choose File* to find the file you have saved on your computer
3. Overtype here if you want to change the width
4. Overtype here if you want to change the height
5. *Ok* to insert the image into the template

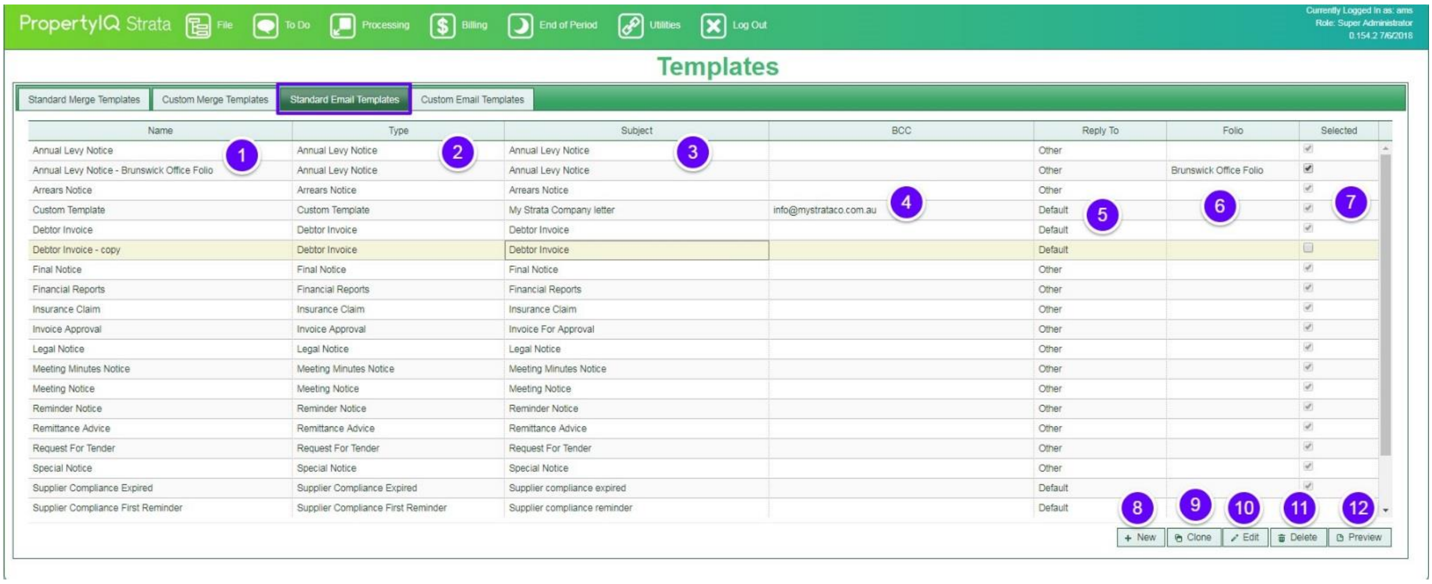


STANDARD EMAIL TEMPLATES

Here you can set up all the email templates for system generated emails. These templates are the covering emails that generate when you send different types of documents from PropertyIQ.

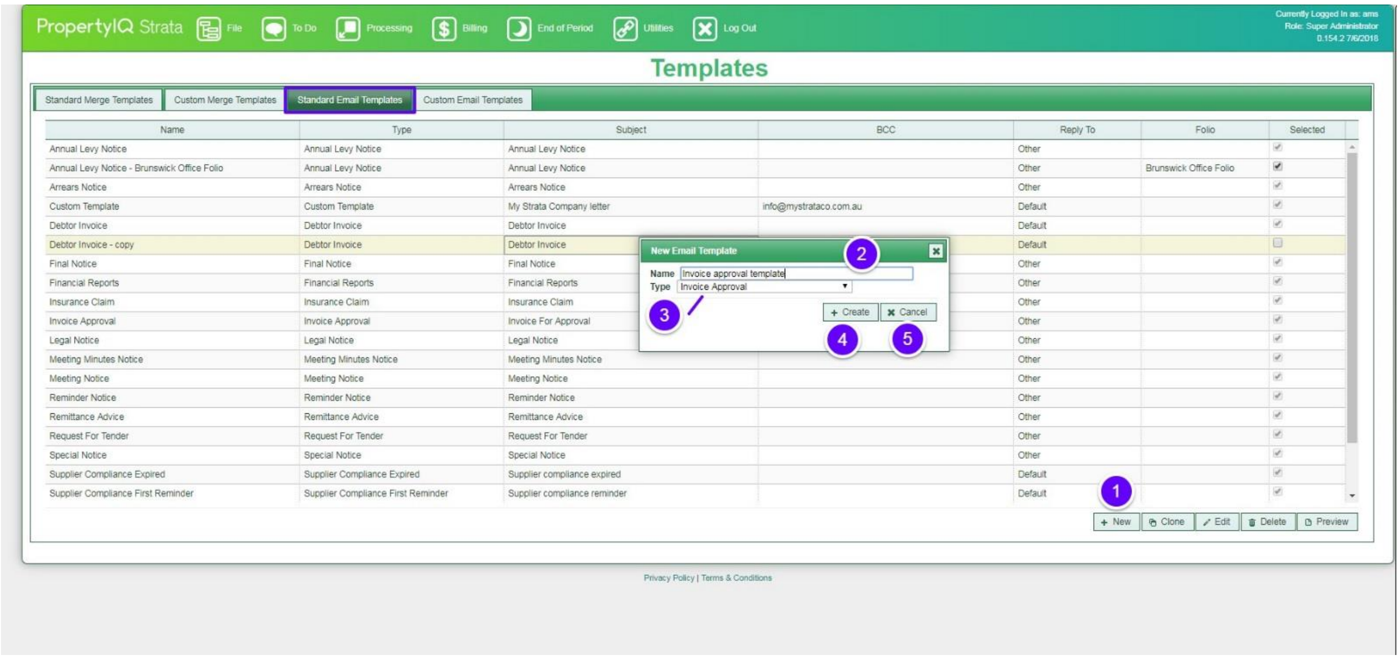
You should review and update these prior to emailing any system generated documents e.g. levy/fee notices, meeting notices, financial reports and documents.

1. The name of the template shows in this column
2. The document/task type that the template is attached to shows in this column
3. The subject line of the email shows here. This is the subject line that the recipient sees. (with the exception of the custom template – when sending these, you need to enter a specific subject for each instance
4. If you have entered a default BCC email address for this template it shows here
5. The email address option you entered for the template shows in this column
6. If the template has been set up as a Folio specific template, the name of the template shows here
7. If the template is selected as a default template it shows in this column with a tick. If it is not a default template, it does not have a tick.
8. *New* to create a new email template
9. *Clone* to clone an existing template
10. *Edit* to edit an existing template
11. *Delete* to delete a template you have highlighted on the screen
    You can't delete a template while it is selected as a default – If you want to delete an unwanted template, you need to select a new default template for that email type first.
12. *Preview* to preview an email template you have highlighted on the screen



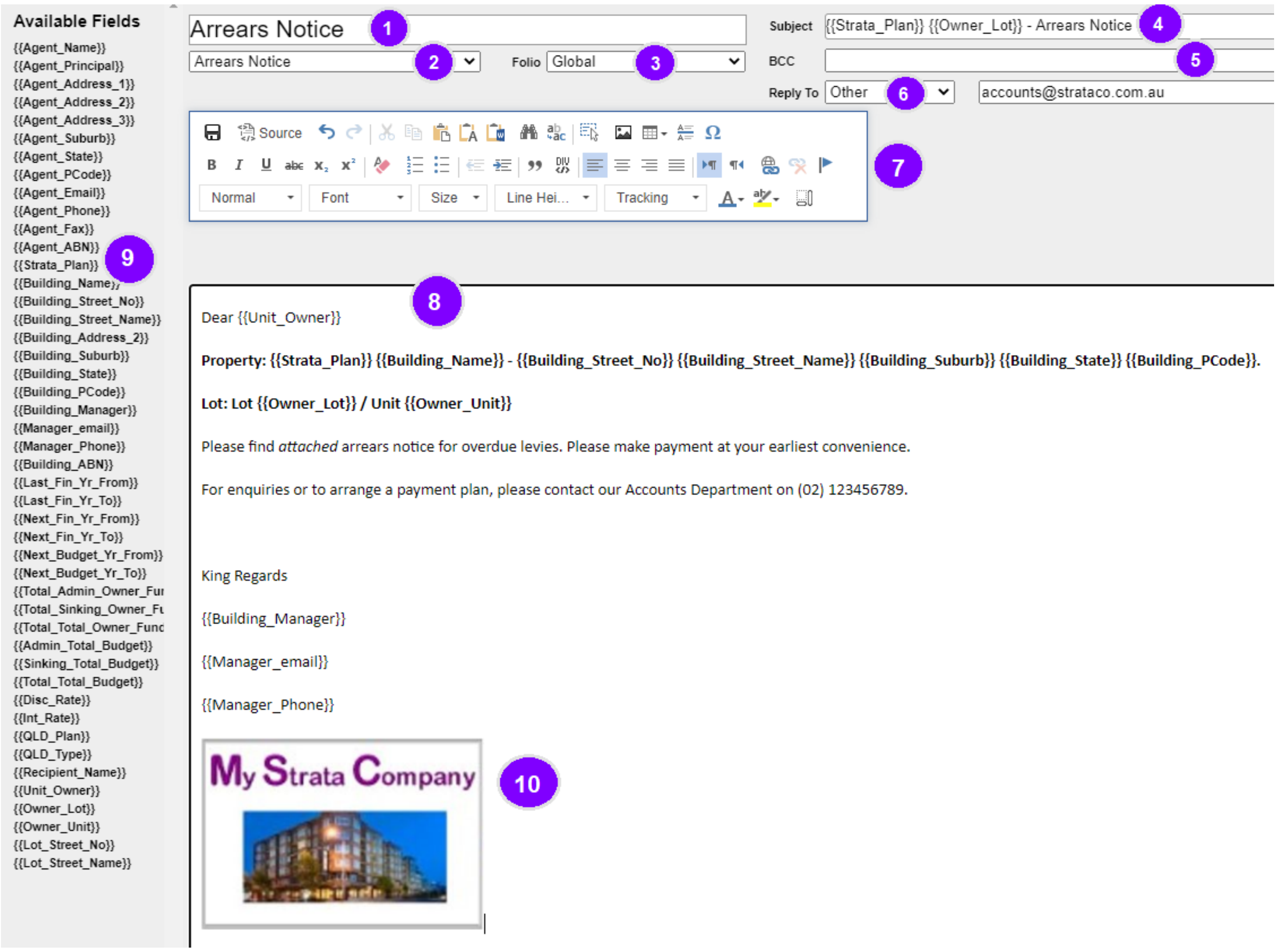
CREATING A STANDARD EMAIL TEMPLATE

1. Click the *+New* button
2. Type a name for the new template here
3. Select the template type from the dropdown list
4. *Create*
5. *Cancel* to exit



1. The name you entered in Step 1 shows here
2. The template type shows here
3. The folio defaults to Global, but if you use Folios, you can select the Folio you want this template to apply to from the dropdown list
4. Type a subject line here, this is the subject line recipients will see when they receive the email
5. You can type a bcc email address here. This will bcc this email address whenever the email template is generated (optional)
6. Choose a reply to option from the dropdown list here. The choices are:
    i. System default – the email that is entered in your company details
    ii. Manager Email – the strata manager for the building
    iii. Other – if you choose other you need to type the other email address
7. Use the editing functions to format the template – see the Document Editing functions section above for details
8. Type in the body of the email template
9. From the available list of merge fields, you can also click and insert merge fields into the **body** of the email and/or the email **subject**.

    NOTE: Some template types incorporate a {{message}} merge field. For an invoice approval email, this message contains the details of the invoice (Strata Plan number, supplier, invoice amount and reference (invoice) number).
10. You can add your logo by inserting an image if you want to.



The email template will look something like this.

1 1 - Arrears Notice

AU To

Lot 1 - Arrears Notice to 28-01-2022.pdf
100 KB

Dear Brena Mulligan

Property: SP1 The Bachelor Pad - 1-8 Hollywood Drive SYDNEY.

Lot: Lot 1 / Unit 1

Please find *attached* arrears notice for overdue levies. Please make payment at your earliest convenience.

For enquiries or to arrange a payment plan, please contact our Accounts Department on (02) 123456789.

King Regards

Bella Carstairs

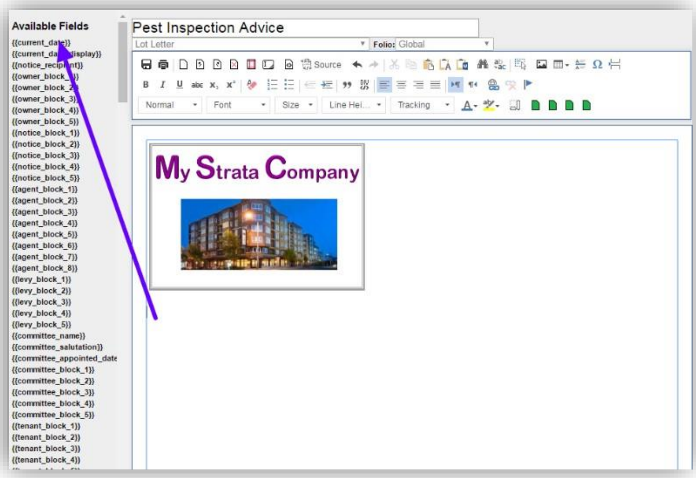
bellac@strataco.com.au

02 4556 6554

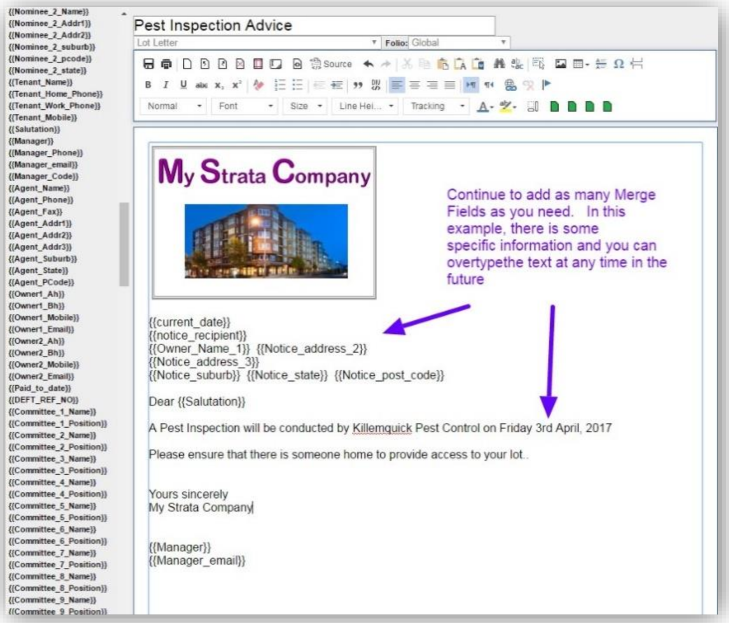
MERGE FIELDS

All the available merge fields for the type of template you want to create show on the left side of the screen

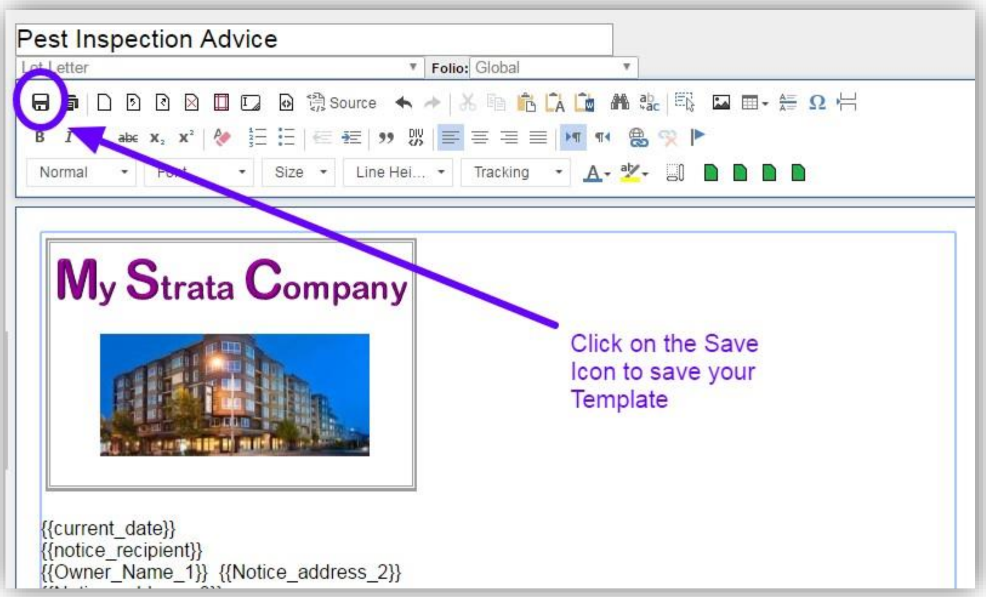
To add a merge field, place your cursor in the position you want the merge field to be and click on the merge field you want.



Continue adding your merge fields and typing the text you want.



When you are happy with your Template, click on the Save Icon



RECOMMENDATIONS

1. Avoid using large tables, or tables for general layout. Try to limit the use of tables to:
    i. When you are creating tabular data, eg. a table of levies with their due dates & amounts
    ii. When you need to have 2 (or more) columns of content appearing on a single row.
2. Try and avoid having any "draggable" text boxes for general content. The main use where textboxes are still useful is for adding page headers to each page, (see Page Headers below)

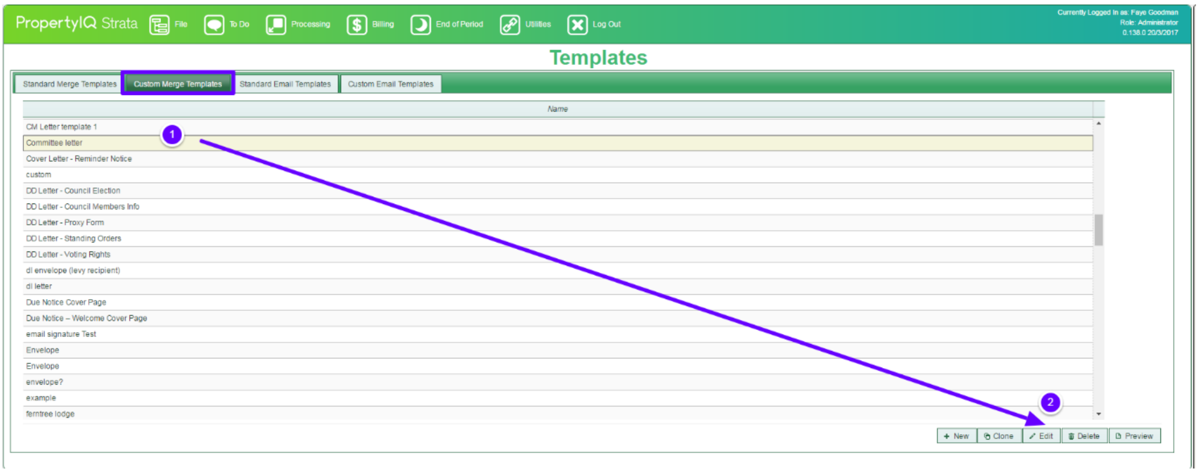
CONVERTING EXISTING DOCUMENTS TEMPLATES THAT USE TEXT BOXES TO USE PAGES

Original Custom Merge Documents and Standard Merge Documents will be formatted with text boxes. You can continue to use them with this format .

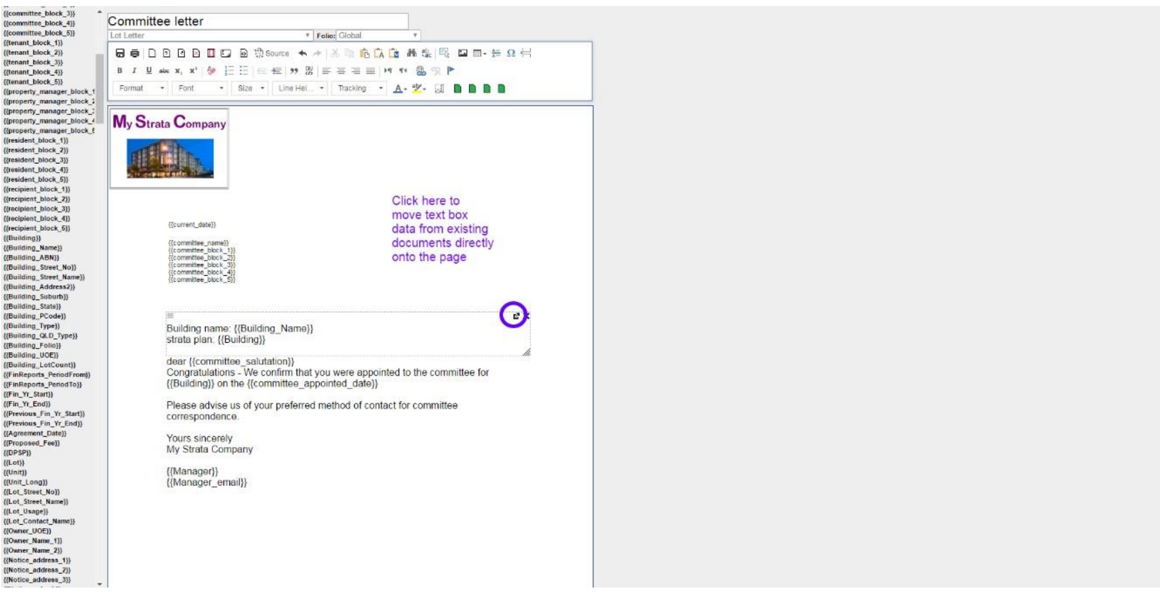
If you have existing documents that were created using text boxes and you want to update the format, you can move content from the textbox to the page by clicking the button in the top right corner of the text box called 'Move content to page'. When you click this button, it will move ALL the content from that textbox to the page beneath the textbox and will remove the textbox from the template. The content will be inserted on the page based on the rules below:

i. If the page below the textbox had a cursor position (i.e. had focus with the flashing cursor) the content will be inserted where the cursor was located in the document.
ii. If the page below did not have a cursor position, the content will be inserted in the last position on that page.

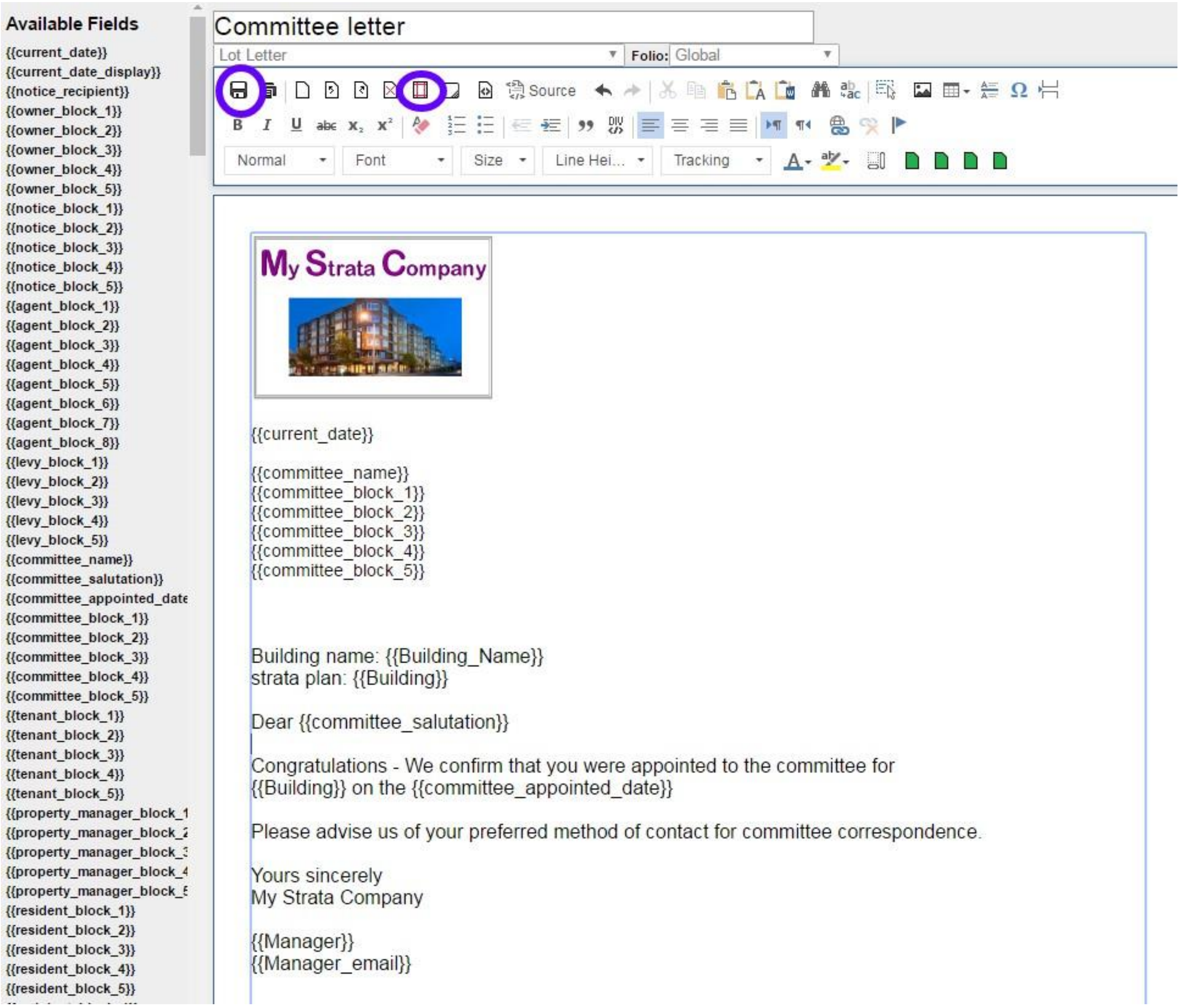
1. First, select the document you want to edit
   From the Template list, click on the template you want to edit to highlight it and then double click *or*
2. Click on the Edit button on the bottom right of the page



Move the content from the textbox to the page by clicking the button in the top right corner of the text box called 'Move content to page'.



Remember to insert margins. Depending on how the original template was set up, you may have to move some items around on the page. Save your template when you are done.



If there is a textbox with a really large table, rather than just moving the table to the page, we recommend that you try to re-create the content on the page WITHOUT using a single large table. Either smaller size tables, or no tables at all. See the section “Tables” below.

OTHER TIPS

GENERAL

Use Enter to insert a new paragraph

Use Shift + Enter to insert a new line in the SAME paragraph (useful if you want to keep content together when it shifts to the next page)

Add a manual page break when you want to ensure content will always start at the top of the next page

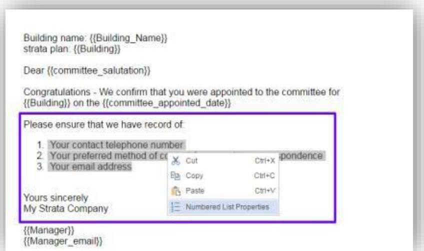
PAGE HEADERS

Currently the product doesn’t support “real” page headers, however you can create a page header effect by following these steps.

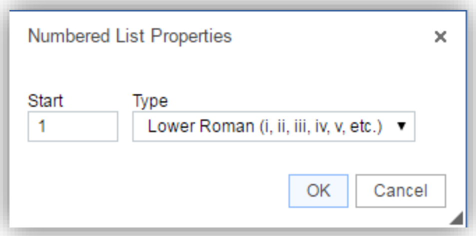
- Use the 'add textbox' button for each page,
- Copy the header content into the text box
- Position the text box at the top of each page
- Set the page top margin to be larger than the bottom of the textbox

LISTS

- Use lists for numbered or un-ordered lists to give automatic numbering
- Right-click on a list and select 'Numbered List Properties' to edit the list (e.g. change the numbering style to alphabetic, or roman numerals)



Highlight the list you want to edit and right click, then click on Numbered List Properties



Use the dropdown list to choose a different list type

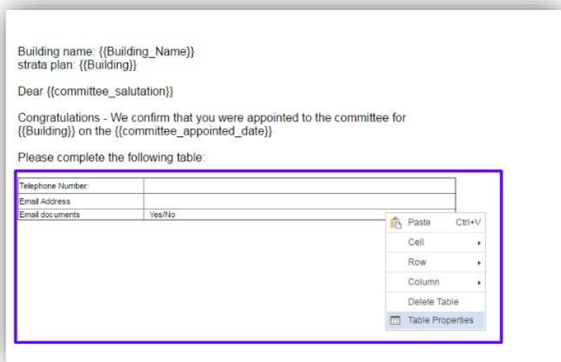
- Shift +Enter to add a new line in a list WITHOUT adding a new bullet point
- Enter whilst on an indented line to move to outdent line

INDENTING

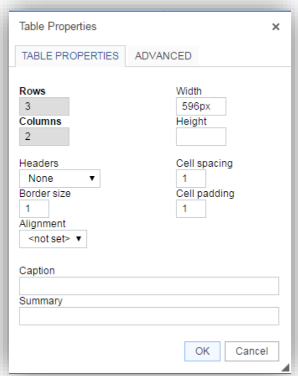
- You can indent lists using the indent buttons on the toolbar. (this will create a multi- level list) or you can use the Tab button to indent.
- You can also indent paragraphs, tables, images or other elements using the indent button.

ALIGNMENT

- To align text to left, right or centre, highlight the text & click the alignment button on the toolbar.
- To align a TABLE, right click on the table, and select "Table Properties' and then select the alignment from the popup. (If you use buttons on the toolbar, it will align the TEXT in the table rather than the table).

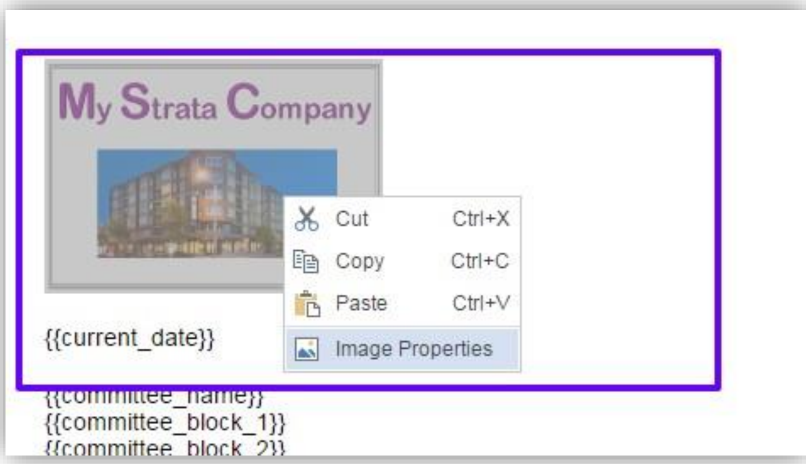


Right click on the table and then click on Table Properties

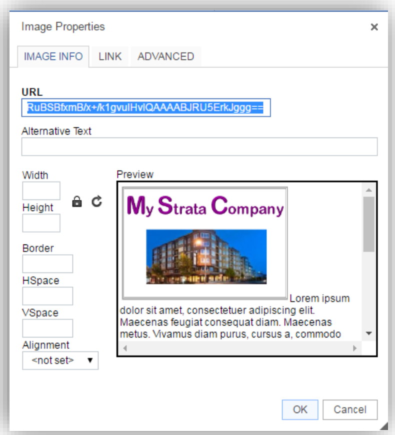


Edit the Table Properties and click OK to save

- To align an image, you can right click on the image and select "Image Properties" and select the alignment of the image from the popup, or you can select the image and click the 'Left Align / Right Align' buttons to change its alignment.



Right click on the image and then click on Image Properties



Edit the Image Properties and click Ok to save

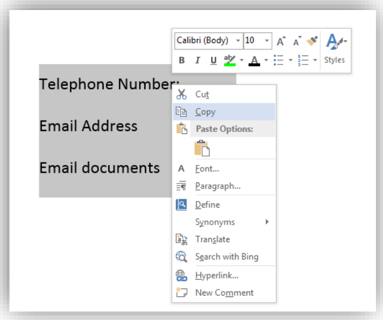
NOTE Do not left align or right align a table or an image if the table/image width is the full width of the page. (e.g. if width is 100% or even a pixel size that is the width of the document, setting the alignment to left or right will potentially cause issues between what the document looks like in the browser, and what it looks like in the PDF file.) I.E. Only use the left/right alignment for elements that don't use the full width of the page.

- If you want to use tables for layout, we recommend setting the table width to 100% (rather than a specified pixel size). This means the table will resize automatically if you change margin sizes.
- You can resize column widths in a table by hovering over the border of a column, and then dragging the column border with the mouse to resize it.
- To move all the content out of a large table you can:
    1. Highlight all the content of the table with the mouse, and copy (or cut) the table
    2. Paste the content into notepad, or MS WORD (if pasting into word, select 'Keep Text Only' when pasting) which will paste all the content but will remove all the tables, rows and cells.
    3. Copy the pure text content, and paste it back into the document.
    4. Format the text as required

Highlight the whole table and right click, select Cut or Copy

Open Word or Notepad and create a new document. Right click to paste the information you have just copied.

If using Word, choose the option on the right – keep text only



Copy the text from Word

Paste it back into the document template in PropertyIQ.

NOTE Depending on your security settings, you may have to use your Ctrl+V keys to paste into the template.

KEYBOARD SHORTCUTS

Ctrl + s → Save the template

Ctrl + b → Make highlighted text bold

Ctrl + i → Make highlighted text italic

Ctrl + x → Cut the selected text to clipboard

Ctrl + c → Copy the selected text to clipboard

Ctrl + p → Paste the selected text to the current position on the document

Shift+Ctrl+3 → Enables entering content (by adding a new paragraph) before a problematic element such as an image, table or <div> element that starts or ends a document, list, or even adjacent horizontal lines.

Shift+Ctrl+4 → Enables entering content (by adding a new paragraph) after a problematic element such as an image, table or <div> element that starts or ends a document, list, or even adjacent horizontal lines.

Backspace, Del → Deletes a character.

Ctrl+Backspace, Ctrl+Del → Deletes a word.

Tab – Indents a list

Shift+Tab – Outdents a list.