

# PropertyIQ™



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**PIQ+ Meetings  
Libraries – Email Templates**

Quick Reference Guide

Version 1. August 2023





-  **Description**
  - This is a Quick Reference Guide for PIQ+ Meetings: **Libraries - Email Templates**.
  - Email templates are created and stored in a central location called the Email Templates library.
  - Email templates are one of the building blocks for creating and conducting your meetings. You will link email templates - for notice and minutes distribution - to your Meeting Templates. The meeting templates are then used to create Meetings.
  
-  **What you'll learn**

This guide will assist you to navigate the following:

  - [View email templates in the library](#)
  - [Create a new email template](#)
  - [Edit an existing email template](#)
  - [Archive an email template](#)

Additional information included:

  - [Important system behaviour](#)
  - [Permissions](#)
  
-  **Who should read this**
  - Users responsible for Email Template creation and maintenance
  - Strata Managers
  - Administrators
  
-  **Read time**

9 minutes

# How to view Email Templates

1 Select **Libraries** from the left hand navigation menu.

2 Select **Email Templates** tab.

3 Sort the list of email templates by selecting any of the column headings.

4 A list of Email Templates will be displayed. Select any email template in the list to open, view and edit.

5 Select **Action Menu** to archive an email template.

6 Select **Include Archived** toggle to view archived email templates in the list.

7 Select **+Create email template** to create a new email template.

PropertyIQ

Jacqueline PIQ Log out

MOTIONS **EMAIL TEMPLATES** MEETING TEMPLATES

Meetings

Libraries

Settings

### Email templates

7 items

Include archived

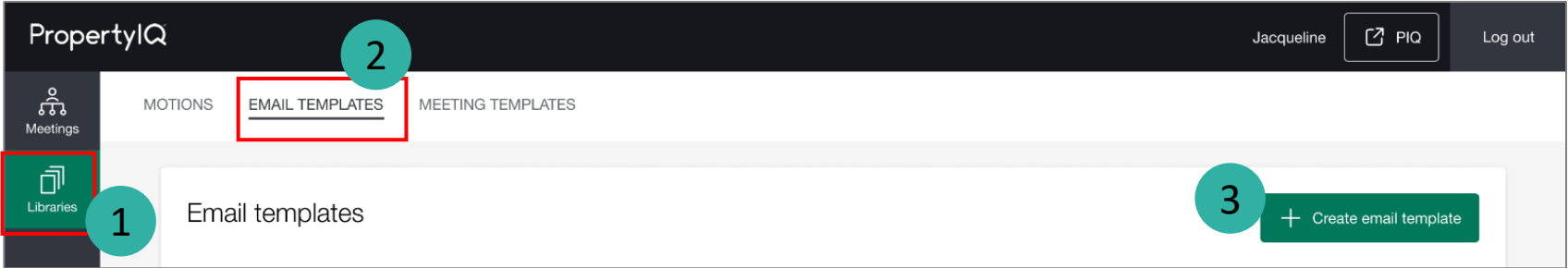
Description	Folio	Type	Last updated	
<a href="#">AGM Notice Email</a>	Global	Meeting notice	08/05/2023 by Jacqueline Reid	<span>⋮</span>
<a href="#">AGM Minutes Email</a>	Global	Meeting minutes	08/05/2023 by Jacqueline Reid	<span>⋮</span>
<a href="#">AGM Notice - COVID-19 info</a>	Global	Meeting notice	08/05/2023 by Jacqueline Reid	<span>⋮</span>
<a href="#">Committee Meeting Notice Email</a>	Global	Meeting notice	08/05/2023 by Jacqueline Reid	<span>⋮</span>
<a href="#">Committee Meeting Minutes Email</a>	Global	Meeting minutes	08/05/2023 by Jacqueline Reid	<span>⋮</span>
<a href="#">Meeting Notice - Generic</a>	Global	Meeting notice	08/05/2023 by Jacqueline Reid	<span>⋮</span>
<a href="#">Meeting Minutes - Generic</a>	Global	Meeting minutes	08/05/2023 by Jacqueline Reid	<span>⋮</span>

+ Create email template

There are 13 steps to creating an Email Template. Below are steps 1-3.



- 1** Select **Libraries** from the left-hand navigation menu.
- 2** Select **Email Templates** tab.
- 3** Select **+Create email template** to create a new email template.



There are 13 steps to creating an Email Template. Below are steps 4-7.



**4** Enter the **Description**. This is for internal use only to assist with identification.

**5** Select **Type** to determine distribution use. Options are Meeting notice or Meeting minutes. You will only be able to view and link email templates of the correct **Type** under the notices or minutes sections of a meeting template.

**Note:** You cannot change this once the template is created.

**6** Select **Folio** to determine if email template is for global or specific folio use. Menu options are **Global** and a list of all folios in your PropertyIQ.

**Note:** You cannot change this once the template is created.

**7** Select **Reply to** email address. Menu options are System Default, Manager, Other. The default menu option is **System Default**.

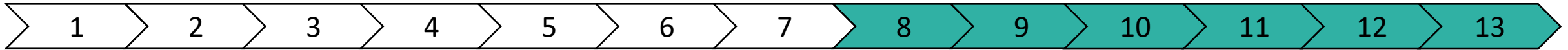
**Note:** For **Other**, only one email address is accepted at a maximum of 255 characters.

The screenshot shows the 'AGM Notice Email' form in the PropertyIQ interface. The form is titled 'AGM Notice Email' and is located under 'Libraries > Email templates'. The user is logged in as 'Jacqueline' and can 'Log out' or 'PIQ'. The form has a sidebar with 'Meetings' and 'Libraries' options. The form fields are as follows:

- Description (internal only)\*:** A text input field containing 'AGM Notice Email', highlighted with a red circle labeled '4'.
- Type\*:** A dropdown menu with 'Meeting notice' selected, highlighted with a red circle labeled '5'.
- Folio\*:** A dropdown menu with 'Global' selected, highlighted with a red circle labeled '6'.
- Email:**
  - Reply to\*:** A dropdown menu with 'System default' selected, highlighted with a red circle labeled '7'.
  - CC:** An empty text input field.
  - Include manager email**
  - BCC:** An empty text input field.

At the bottom right of the form, there are 'Cancel' and 'Create' buttons.

There are 13 steps to creating an Email Template. Below are steps 8-13.



8

Enter **CC** recipients by entering one or more email addresses. Separate multiple email address with a semi-colon ( ; ). Tick **Include manager email** checkbox as a shortcut to always CC the manager for these emails.

9

Enter **BCC** recipients by entering one or more email addresses. Separate multiple email address with a semi-colon ( ; ). Tick **Include manager email** checkbox as a shortcut to always BCC the manager for these emails.

10

Enter email **Subject**. You can drag and drop or click and insert **Merge fields** from the list on the right (refer to step 12).

11

Enter email **Body text**. You can drag and drop or click and insert **Merge fields** from the list on the right (refer to step 12). Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.

12

Add **Merge fields** to your text using the merge field library. You can search, drag and drop or click and insert any fields that may be required.

13

Select **Create** to save the email template.

The screenshot shows the 'AGM Notice Email' template editor. The 'CC' field (8) contains a semi-colon and has the 'Include manager email' checkbox checked. The 'BCC' field (9) is empty. The 'Subject' field (10) contains 'Meeting minutes - {{Strata plan number}} - {{Meeting date}}'. The 'Body text' field (11) contains 'Dear {{Recipient name}},' followed by a paragraph of text with merge fields: 'The AGM of the Owners of Strata Plan {{Building\_Number}} will be held at:' and 'Date: {{Meeting\_Date}}'. The 'Merge fields' library on the right (12) has a search bar and a list of fields including 'Building ABN', 'Building address 2', 'Building name', and 'Building plan QLD'. The 'Create' button (13) is highlighted in green at the bottom right.

# How to edit an existing Email template

There are 6 steps to edit an Email Template. Below are steps 1-4.



- 1
- 2
- 3
- 4

1 Select **Libraries** from the left hand navigation menu.

2 Select **Email Templates** tab.

3 Select an **Email Template** from the list. You can click anywhere on the email template row, not including **:**.

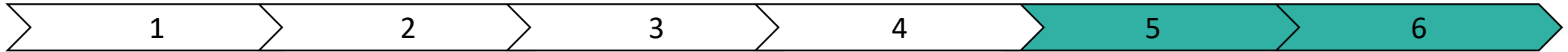
4 Once the template is open, select **Edit**.

The top screenshot shows the PropertyIQ interface with the 'EMAIL TEMPLATES' tab selected. The left navigation menu has 'Libraries' highlighted. A table lists email templates with columns for Description, Folio, Type, and Last updated. The 'AGM meeting notice email' row is highlighted.

Description	Folio	Type	Last updated
<a href="#">AGM meeting minutes_email</a>	Global	Meeting minutes	21/06/2023 by Michael
<a href="#">AGM meeting notice_email</a>	Global	Meeting notice	21/06/2023 by Michael
<a href="#">April202023_Minutes</a>	Global	Meeting minutes	20/04/2023 by Jaz
<a href="#">April202023_Notice</a>	Global	Meeting notice	20/04/2023 by Jaz

The bottom screenshot shows the 'AGM meeting notice email' details page. The 'Edit' button is visible in the top right corner.

There are 6 steps to edit an Email Template. Below are steps 5-6.



5

Change the existing content areas.

- a. Description (internal only)\*
- b. Reply to\*
- c. CC
- d. BCC
- e. Subject\*
- f. Body text\*

\*Fields are mandatory

6

Select **Save** to save your changes.



You can archive an email template that is redundant or obsolete.

- 1 Select **Libraries** from the left hand navigation menu.
- 2 Select **Email Templates** tab.
- 3 Select **:** on the email template you want to archive.
- 4 Select **Archive** in the menu.



## TIPS

- Archived email templates cannot be unarchived.
- To view archived email templates in the list, select **Include Archived** toggle.

The screenshot shows the PropertyIQ interface. The left navigation menu has 'Libraries' highlighted with a red box and a '1' in a teal circle. The top navigation bar has 'EMAIL TEMPLATES' selected with a red box and a '2' in a teal circle. The main content area shows a table of 'Email Templates' with 53 items. The table has columns for Description, Folio, Type, and Last updated. The second row is highlighted, and a red box highlights the 'Archive' button in the dropdown menu, with a '3' in a teal circle above it and a '4' in a teal circle below it. A 'Create email template' button is in the top right, and an 'Include Archived' toggle is below it.

Description	Folio	Type	Last updated
<a href="#">AGM meeting minutes email</a>	Global	Meeting minutes	21/06/2023 by Michael
<a href="#">AGM meeting notice email</a>	Global	Meeting notice	21/06/2023 by Michael
<a href="#">April202023 Minutes</a>	Global	Meeting minutes	20/04/2023 by Jaz
<a href="#">April202023 Notice</a>	Global	Meeting notice	20/04/2023 by Jaz
<a href="#">April242023 Minutes</a>	Global	Meeting minutes	15/05/2023 by Michael
<a href="#">April242023 Notice</a>	Global	Meeting notice	24/04/2023 by Jaz
<a href="#">April272023 Minutes</a>	Global	Meeting minutes	24/05/2023 by Jaz
<a href="#">April272023 Notice</a>	Global	Meeting notice	24/05/2023 by Jaz

## Creating

- You must create the following email templates **before** you can create any meeting templates:
  - 1x email template of type 'meeting notice' and assigned to 'Global' folio
  - 1x email template of type 'meeting minutes' and assigned to 'Global' folio
- 'Folio' and 'Type' fields cannot be changed once it's been created.

## Editing

- Any changes to an email template will be effective immediately upon saving and used for all future distribution jobs.

## Archiving

- An email template cannot be archived if it's linked to any active Meeting template/s; you'll be notified if it's in use when trying to archive. Before you can archive, you will need to select a new email template for those meeting templates.
- Once an email template is archived, it cannot be unarchived.
- Archived email templates cannot be edited.

⋮

Access to the email templates library will be determined by the user permissions set in PropertyIQ under Utilities>Security menu. If you think you have the wrong permissions, please contact your administrator to update your role permission in PIQ.

## View, create, edit and archive email templates

Users with: Utilities> Security> Role> File - Email Templates	<b>View</b>	View email templates and any email template in the library in read-only mode.
	<b>Add</b>	Create email templates.
	<b>Edit and Archive</b>	Edit and archive email templates.

## User data access restrictions

Users with: Utilities> Security> Role> Data Access Restriction	<b>No Data Access Restriction</b> can work with email templates belonging to global and all folios.
	<b>Restrict to Data In Users Folios</b> can only work with email templates under global and folios they have access to. For example, if a user has access to Folio A and B, they will only have access to email templates belonging to global, Folio A and Folio B.
	<b>Restrict to Data in Buildings Managed by User</b> can only work with email templates under global and folios with buildings they have access to. For example, if a user has access to Building A and B of Folio X and Building E of Folio Y, they will only have access to meeting templates belonging to Global, Folio X and Folio Y.



**TIP:** If your administrator has updated your permissions, you will need to logout and then login again for those permissions to reflect in PIQ+.