

PropertyIQ™

PIQ+ Meetings Meetings – Edit & Preview Minutes Document

Quick Reference Guide

Version 1. August 2023





Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Meetings - Edit and Preview Minutes Document**.
- When creating a new meeting, all the pre-defined data from the meeting template will be copied into the new meeting, saving time and providing consistency in document design and formatting.
- From the meeting, you can preview and edit the minutes document, add attachments and view a final PDF version before distribution.



What you'll learn

This guide will assist you to navigate the following:

- [How to preview a Minutes document for a meeting](#)
- [How to edit a Minutes document for a meeting](#)
- [How to add attachments to a Minutes document for a meeting](#)
- [How to preview a Minutes document before distribution](#)
- [How to use page breaks in a Minutes document](#)



Who should read this

- Users responsible for editing and distributing meeting minutes
- Strata Managers
- Administrators

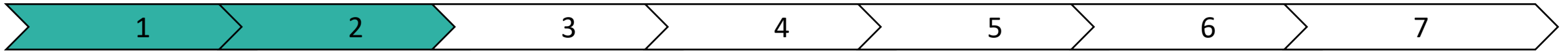


Read time

7 minutes

How to preview a Minutes document for a meeting

There are 7 steps to preview a minutes document for a meeting. Below are steps 1-2.



1

Select **Meetings** from the left hand navigation menu.

2

Select a **meeting** from the list to view details of the meeting and to preview and/or edit the minutes document.

PropertyIQ Nicki Scrivener PIQ Log out

Meetings

Building Date Status

1096 items

Meeting	Plan	Meeting type	Date	Manager	Status
18421 - AGM 01/10/2023 Jacksons Hill - 1014 Phillips Drive REDHILL, NSW 2001	18421	AGM	01/10/2023, 10:30AM		Pending notice
988 - AGM 30/09/2023 Waldorf Apartments - 2 Sussex Street REDFERN, NSW ...	988	AGM	30/09/2023, 09:00AM		Notice sent
988 - AGM 30/09/2023 Waldorf Apartments - 2 Sussex Street REDFERN, NSW ...	988	AGM	30/09/2023, 08:30AM		Notice sent
987 - VOCM 30/09/2023 Sydney Tower - 261 George Street SYDNEY, NSW 2563	987	VOCM	30/09/2023, 07:00AM		Cancelled
988 - AGM 29/09/2023 Waldorf Apartments - 2 Sussex Street REDFERN, NSW ...	988	AGM	29/09/2023, 09:00AM		Completed
234323 - AGM 01/09/2023 Scott's Mansion - 1 Park Lane KENSINGTON, QLD	234323	AGM	01/09/2023, 07:50AM		Pending notice
234323 - AGM 01/09/2023 Scott's Mansion - 1 Park Lane KENSINGTON, QLD	234323	AGM	01/09/2023, 07:50AM		Pending notice
234323 - VOCM 01/09/2023 Scott's Mansion - 1 Park Lane KENSINGTON, QLD	234323	VOCM	01/09/2023, 07:50AM		Notice sent

Settings

There are 7 steps to preview a minutes document for a meeting. Below are steps 3-7.



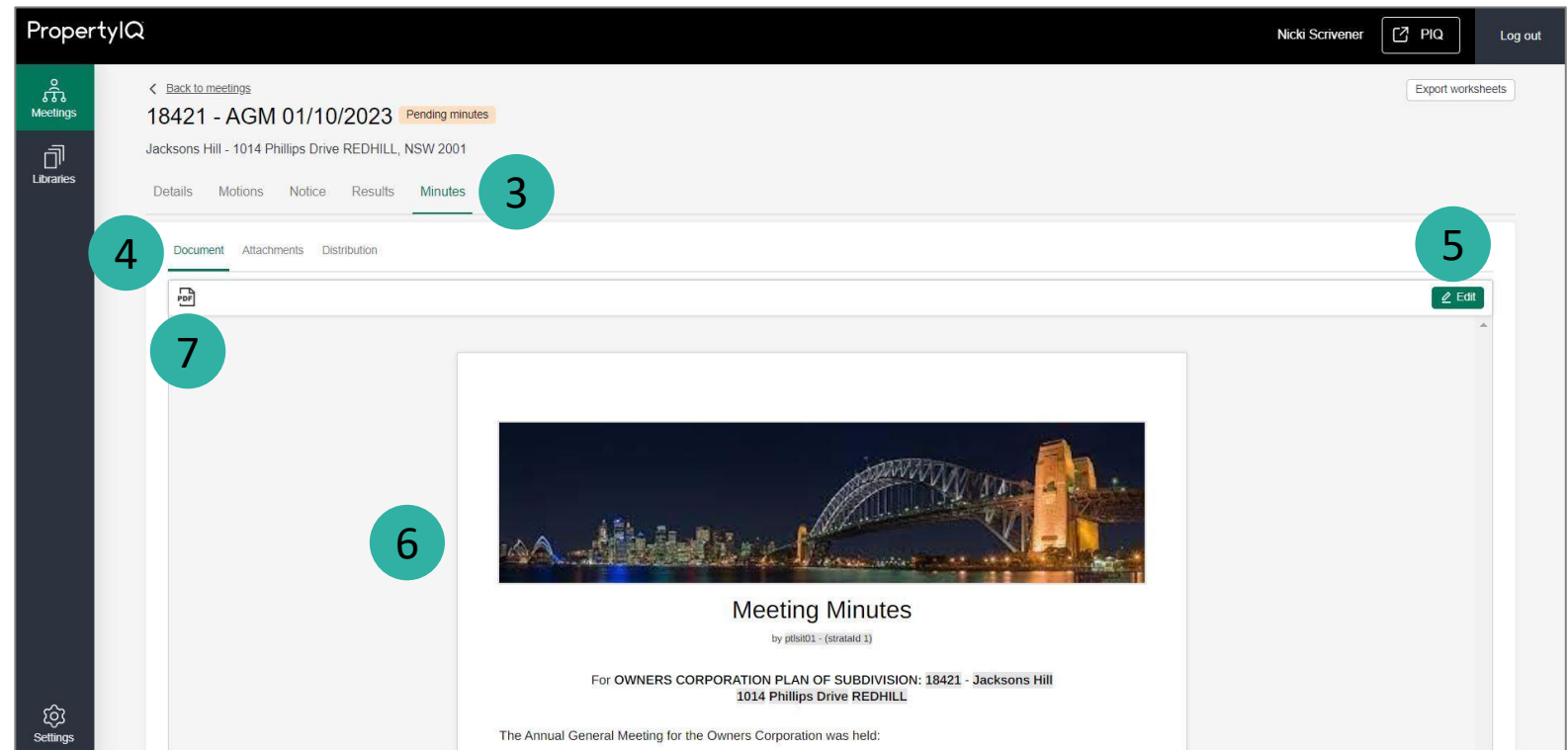
3 Select **Minutes** tab.

4 Select the **Document** tab to preview and edit your minutes document.

5 Select **Edit** to create and edit content for your meeting minutes.
See Slide 5 for more information.

6 **Preview** the Minutes document live on screen here.

7 Select **PDF/Print** icon to preview the minutes document as a PDF file.



To enable edit mode on a minutes document, follow **Steps 1-5 on Slides 3 & 4.**

1

Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.

2

Add content to your meeting minutes here.

3

Select **Save** to save changes to the meeting minutes.



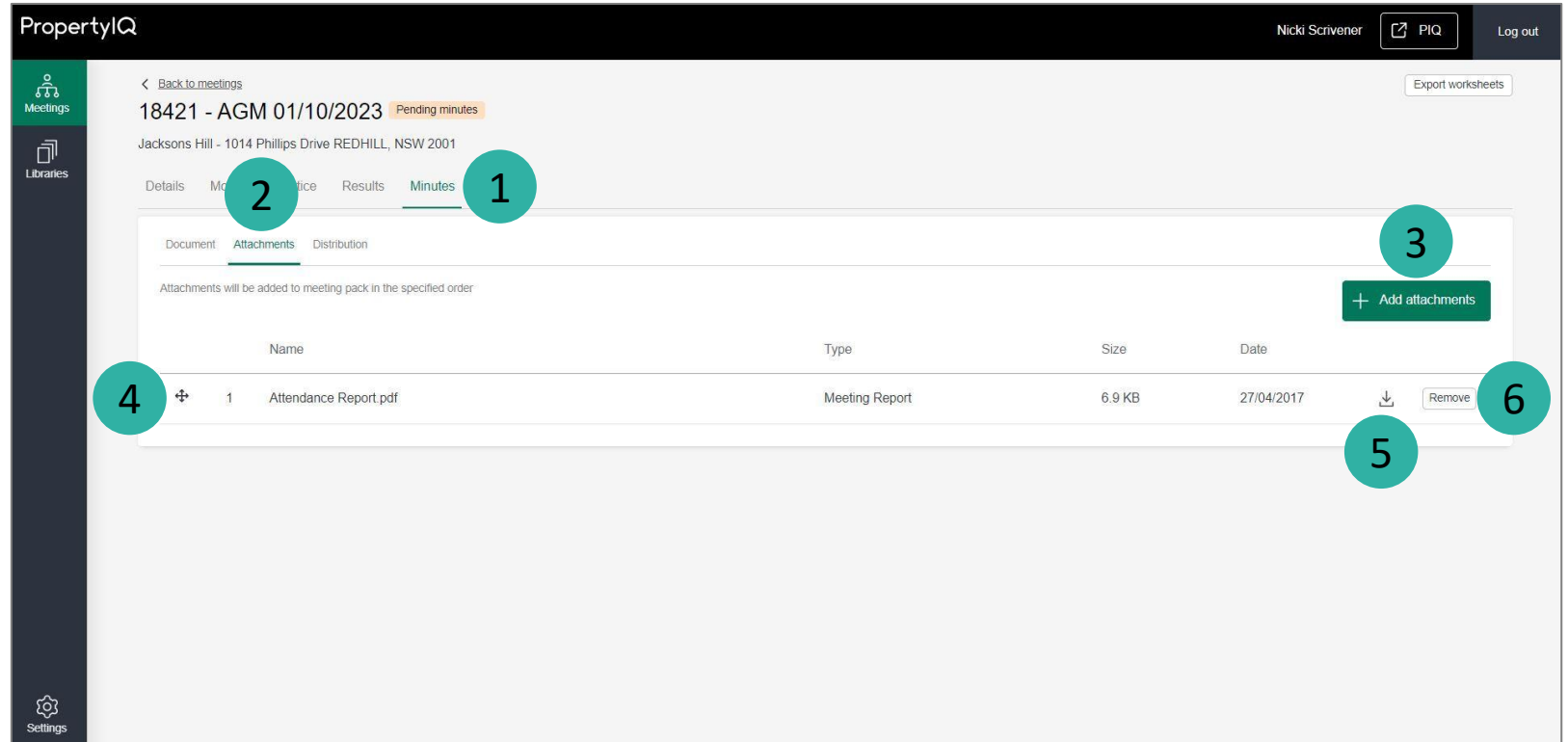
TIPS:

- **Merge fields** can only be added or removed from a meeting template under Libraries>Meeting Templates.
- See Slide 8 for more information on **page breaks**.

How to add attachments to a Minutes document for a meeting

To view and add attachments to a minutes document, **follow Steps 1-2 on Slide 3** to open a meeting.

- 1** Select **Minutes** tab.
- 2** Select **Attachments** tab.
- 3** Select **+ Add attachments** to add new attachments.
- 4** Select **+** to re-order attachments in the list.
- 5** Select **↓** to view an attachment.
- 6** Select **Remove** to delete an attachment.



To preview a minutes document (including attachments) before distribution, **follow Steps 1-2 on Slide 3** to open a meeting.

1 Select **Minutes** tab.

2 Select **Distribution** tab.

3 Select **Preview** to preview the minutes as a PDF file. This will include the minutes document and any attachments.

Note: Once the PDF file is ready, you'll see a popup message on the top right of your screen with a link to open the file.

4 You can also preview the **email template** that will be used for email distribution by clicking here.

The screenshot shows the PropertyIQ web application interface. At the top, the user is logged in as 'Nicki Scrivener'. The main content area displays details for a meeting titled '18421 - AGM 01/10/2023' with a 'Pending minutes' status. The meeting location is 'Jacksons Hill - 1014 Phillips Drive REDHILL, NSW 2001'. The 'Minutes' tab is selected, and the 'Distribution' sub-tab is active. A 'Preview' button is visible, and the 'Distribute' section shows options for recipients: 'Lot owners' (checked), 'Committee', and 'Formal tenants'. A 'Send' button is at the bottom.



TIPS:

- To further **edit** your minutes and/or attachments, see Slides 5 & 6.
- To edit motions for your minutes, go to the **Motions** tab of your meeting.

