

PropertyIQ™

PIQ+ Meetings Meetings – Edit & Preview Notice Document

Quick Reference Guide

Version 1. August 2023





Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Meetings - Edit and Preview Notice 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 notice 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 Notice document for a meeting](#)
- [How to edit a Notice document for a meeting](#)
- [How to add attachments to a Notice document for a meeting](#)
- [How to preview a Notice document before distribution](#)
- [How to use page breaks in a Notice document](#)



Who should read this

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

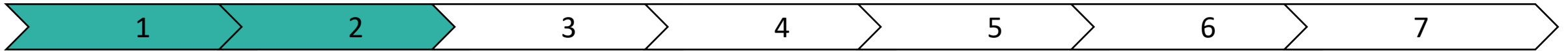


Read time

7 minutes

How to preview a Notice document for a meeting

There are 7 steps to preview a notice 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 notice document.

PropertyIQ Nicki Scrivener PIQ Log out

Meetings Libraries

+ Create meeting

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

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



3 Select **Notice** tab.

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

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

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

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

How to edit a Notice document for a meeting

To enable edit mode on a notice 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 notice here.

3

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



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 Notice document for a meeting

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

- 1 Select **Notice** 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.

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Nicki Scrivener [PIQ](#) [Log out](#)

[Meetings](#) [Libraries](#)

[Back to meetings](#) **18421 - AGM 01/10/2023** Pending notice [Export worksheets](#)

Jacksons Hill - 1014 Phillips Drive, Jacksons Hill, NSW 2001

Details Motions **Notice** Results Minutes

Document **Attachments**

Attachments will be added to meeting pack in the specified order

	Name	Type	Size	Date						
4	+	1	Account Ledger Report.pdf	Financial	73.8 KB	27/08/2018	5	↓	6	Remove
	+	2	13278.pdf	Agency Agreement	353.7 KB	13/03/2017		↓		Remove

3 **+ Add attachments**

Settings

How to preview a Notice document before distribution

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

1 Select **Notice** tab.

2 Select **Distribution** tab.

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

Note: Once the PDF file is ready, you'll see a popup message in 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.



TIPS:

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

The screenshot shows the PropertyIQ interface for a meeting titled "18421 - AGM 01/10/2023" with a "Pending notice" status. The meeting location is "Jacksions Hill - 1014 Phillips Drive, JACKSONS HILL, NSW 2001". The interface has a sidebar with "Meetings" and "Libraries" options, and a top navigation bar with "Back to meetings", "Export worksheets", and "Log out" (user: Nicki Scrivener). The main content area has tabs for "Details", "Motions", "Notice", "Results", and "Minutes". The "Notice" tab is active, and within it, the "Distribution" sub-tab is selected. The "Distribution" section includes a "Notice pack" area with a "Preview" button and a "Distribute" section with a "Send" button. The "Distribute" section lists recipients: "Lot owners" (checked), "Committee" (unchecked), and "Formal tenants" (unchecked). A link for "AGM meeting notice email" is highlighted in the "Distribute" section.



TIP: Use **page breaks** between motions where required.

In accordance with the Owners Corporations Act note the following agenda:

Agenda

1. Accept minutes of the previous meeting

Ordinary resolution

That the minutes of the last meeting held on {{Last AGM date}} be accepted as accurate.

The minutes of the last meeting need to be accepted as accurate or amended if there are any errors. This can be carried with notes.

2. Appointment of Strata Manager

Ordinary resolution

That the Owners Corporation, pursuant to clause 21.304 of the Strata Management Act 2014, be appointed as the managing agent for the period of one year commencing on the date of the meeting and until the next meeting of the Owners Corporation.

- the Powers, Duties, Authorities and Functions of the Managing Agent as set out in a Management Agreement attached to the agenda.
- Authorises the execution of the Strata Management Agreement to affix the Common Seal of the Owners Corporation under signature of the secretary and chairperson, or in their absence, any two lots of owners in the Strata Scheme.

3. Building Insurances

Ordinary resolution

2

Annotations: A blue circle highlights the page break icon in the toolbar above the first motion. A red circle highlights the page break icon between the second and third motions, with a callout box stating "Add page break here". A red box highlights the text "Insert a page break between motions in the Motions block by clicking the page break icon. The natural break between pages is displayed by the dotted line and page number." A red box highlights the page number "2" at the bottom right of the page.