

# PropertyIQ™

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## PIQ+ Meetings Meetings – Settings

Quick Reference Guide

Version 1. August 2023





## Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Meetings - Settings**.
- You can customise your settings for Meetings (e.g. Quorum, Motion results, Motion outcomes).
- These settings will be used throughout the meeting workflow, such as when you're creating motions, recording meeting results and creating meeting minutes.



## What you'll learn

This guide will assist you to navigate the following:

- [How to choose your initial transition settings during adoption of PIQ+](#)
- [How to change Quorum percentage - Global](#)
- [How to change Quorum percentage - Building](#)
- [How to change Quorum percentage - Meeting](#)
- [How to customise Motion Results settings](#)

Additional information included:

- [Important system behaviour](#)
- [Permissions](#)



## Who should read this

- Users responsible for setting and updating meeting settings
- Management / Operations
- Administrators



## Read time

9 minutes

You can flexibly choose how PIQ+ Meetings module is rolled out and adopted in your business by using one of three transition phases. You can also change the transition phase from one to another at any time.

For example:

- You can trial PIQ+ Meetings for some meetings, while you continue to operate as you currently do in current PIQ for your remaining meetings.
- Or you can make a hard switchover to PIQ+ Meetings, by deactivating the menus and features for the old meetings module in current PIQ.

There are three options for transition:

- 1. Current PIQ & PIQ+:** Create and view meetings in both current PIQ and PIQ+.
- 2. Read Only in current PIQ:** Create meetings in PIQ+ only, view historical meetings in current PIQ.
- 3. Hide in current PIQ:** Create meetings in PIQ+ only, historical meetings and menus related to meetings will be hidden in current PIQ.

The Transition Phase setting is located under **Utilities>Settings>PIQ+** tab. This is visible once your account has been enabled for PIQ+.

The screenshot shows the 'Settings' page with a navigation bar containing tabs: Company Details, Application Settings, Meetings, Supplier Compliance, Mailing House, Portal Integration, Bank Settings, Reminders, File System Related, Cover Pages and Attachments, Mail Server Settings, Connections, Statistics, and PIQ+. The PIQ+ tab is selected. Below the navigation bar, there is a section for 'PIQ+' with a sub-section for 'Meetings & Voting'. A dropdown menu for 'Transition Phase' is open, showing 'Current PIQ & PIQ+' as the selected option. A tooltip is displayed below the dropdown, providing instructions on how to transition the organization to the Meetings & Voting feature in PIQ+.

Select how you want to transition your organisation to the Meetings & Voting feature in PIQ+:

- (a) Current PIQ & PIQ+: Use both current PIQ and PIQ+ to create and manage meetings.
- (b) Read Only in current PIQ: Create and manage meetings in PIQ+ only. You can still view historical meetings in current PIQ.
- (c) Hide in current PIQ: Create and manage meetings in PIQ+ only. Historical meetings and menus related to meetings will be hidden in current PIQ (meetings, motion library and meeting templates).

1

Global quorum percentage in **PIQ+**:

You can configure this in PIQ+ under **Settings menu>Meeting Quorum** section.

For new meetings, the quorum percentage used will be:

- **global** quorum; or
- **building** quorum if there is one (see Slide 5); or
- **meeting** quorum which can be manually entered for a specific meeting (see Slide 6).

2

Global quorum percentage in **current PIQ**:

- It's used to pre-populate the global quorum setting in PIQ+ (see Step 1).
- You can configure the global quorum percentage in current PIQ under **Utilities> Settings> Meetings** tab.

PropertyIQ

Jacqueline Log out

Meetings settings

Meeting Quorum

Quorum

25 %

Motion results

Display mover and seconder

Settings

Company Details Application Settings **Meetings** Supplier Compliance Mailing House Portal Integration Bank Settings Reminders File System Related

Meeting Settings

Percentage For Meeting Quorum 25.00% ?

Send Meeting Notices to Tenants (NSW only):  ?

Include Attachment Names on Meeting Notices & Meeting Minutes:

Include generation details on Meeting PDFs headers:  ?

1

## Building quorum percentage in current PIQ:

- You can configure the quorum percentage for a building in current PIQ under **Building card** > **Settings** > **Meetings** accordion.

If a building percentage is set, it will override the global percentage and will be used for any new meetings created in PIQ+ for that building.

The screenshot shows the 'Building' settings interface in PropertyIQ. The 'Meetings' section is expanded, and the 'Quorum' field is highlighted with a red box and a circled '1'. The 'Quorum' field is set to 10.00% and has a question mark next to it. The 'Resolution Date' is set to 01/02/2023. Other sections include 'Electronic Voting' (checked), 'Bank Account', 'Owner Interest', 'Levy Discount', 'Parking', 'Onsite Manager', and 'Caretaker'. The 'Save' and 'Cancel' buttons are at the bottom right.

Meeting quorum percentage in **PIQ+**:

- 1 You can configure the quorum percentage for a specific meeting in PIQ+ under the **Meeting>Details tab>Quorum** field.



## TIP

- If you need to update the quorum percentage and want it to apply to future meetings, update the quorum percentage setting under:
  - PIQ>Utilities>Settings>Meetings tab (globally); or
  - Building card>Settings tab> Meetings (for a building)

The screenshot shows the PropertyIQ interface for editing a meeting. The meeting title is "10453 - AGM 23/02/2050" with a "Pending notice" status. The location is "The Tempo Sync - 48 View Street Sunshine Beach, NOOSA, QLD 4554". The "Other" section contains a rich text editor. Below this, there are fields for "Arrears cut-off date type\*" (set to "Date of notice") and "Arrears cut-off date" (set to "26/05/2023"). A note below these fields states "Date will be auto-updated when generating the meeting notice". The "Cheque clearance date" is set to "14/10/2051". The "Quorum" field is highlighted with a red box and contains the value "25" followed by a percentage symbol "%". A green circle with the number "1" is placed over the "Arrears cut-off date" field. At the bottom right, there are "Cancel" and "Save" buttons.

1

These settings will determine what you see and use on the **Results** screen in a meeting. See Slide 8 for an example.

2

The options here will also determine what is reflected in the meeting minutes.

3

Select the checkbox to enable/disable **mover and seconder** fields. This is de-selected by default.

4

Select the checkbox to enable/disable **vote tally fields**. This is de-selected by default.

Set **naming conventions** and options for motion outcomes e.g. carried, defeated, withdrawn, out of order etc.

- There are 'Yes' and 'No' options by default.
- Add more outcomes using the **+Add motion outcome** button.
- Remove an outcome using the **Remove** button.

PropertyIQ

Jacqueline PIQ Log out

Meetings

Libraries

## Meetings settings

### Meeting Quorum

Quorum

25 %

### 1 Motion results

Display mover and seconder **2**

Display vote tally fields **3**

Outcome

1\* Yes **4**

*This will map to a 'Yes' motion outcome and will be shown as a green badge by default.*

2\* No

*This will map to a 'No' motion outcome and will be shown as a red badge by default.*

[+ Add motion outcome](#)

Settings

This is an example of the **Results** screen in a meeting when fields are enabled.

1

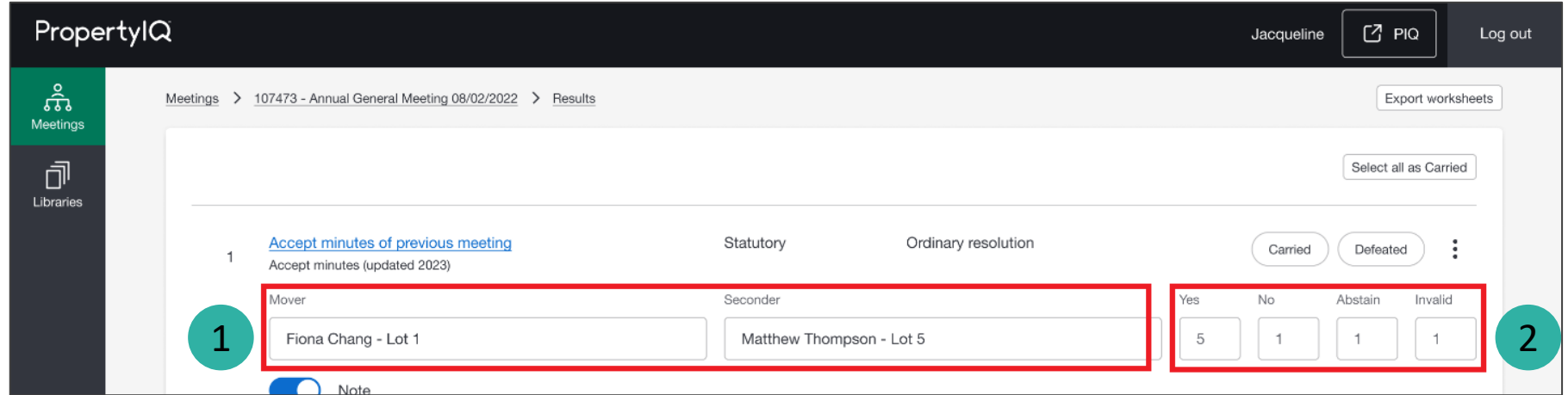
**Mover and seconder:**

Enable this setting to record the mover and seconder details for each motion.

2

**Vote tally fields:**

Enable this setting to record the vote tallies for each motion. Tallies are displayed for Yes, No, Abstain and Invalid.





## General

The options and terminology you select under Settings>Motion Results, will be used in the **Results** screen in a meeting (vote tallies, mover/second) and in **Motions** (setting default text for minutes for each possible outcome).

## Motion outcome names

- Customise outcomes based on the terminology used in your state and your company preferences.
- There are “Yes” and “No” motion outcomes provided by default and are mandatory. You can still customise the name of these two outcomes e.g. change ‘yes’ to ‘carried’.
- The outcome names you nominate will be used in the meeting minutes document, where the **Motion for minutes** merge field is used in the meeting template minutes document.

## Changing motion outcomes (add, edit, remove)

- When making changes to outcome names
  - New motions created will see these changes reflected immediately; and
  - For existing motions, the name will only update upon editing the motion.
- When adding or removing outcomes, they will automatically be added/removed from all motions.
- When adding a new outcome, you’ll also need to go to each motion and add text to the outcome field for the minutes; it will then appear in the meeting minutes.

Access to the meetings settings 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 and edit meetings settings

Users with: Utilities> Security> Role> Utilities - Settings	<b>View</b>	View Meetings Settings in read-only mode.
	<b>Edit</b>	Edit and make changes to Meetings Settings in PIQ+.



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