

# PropertyIQ™

## PIQ+ Meetings Onboarding Guide



# TABLE OF CONTENTS

|                                                                       |           |
|-----------------------------------------------------------------------|-----------|
| <b>Getting started</b> .....                                          | <b>3</b>  |
| <b>Introduction</b> .....                                             | <b>3</b>  |
| <b>Meetings workflow</b> .....                                        | <b>3</b>  |
| <b>Onboarding tasks</b> .....                                         | <b>4</b>  |
| <b>Onboarding tasks</b> .....                                         | <b>4</b>  |
| <b>Prepare users for single sign-on (PIQ+ Readiness wizard)</b> ..... | <b>4</b>  |
| Preparation .....                                                     | 4         |
| Run the wizard .....                                                  | 5         |
| <b>Configure settings</b> .....                                       | <b>6</b>  |
| Transition phase – Choose how you adopt the feature.....              | 6         |
| Quorum percentage.....                                                | 6         |
| Motion results.....                                                   | 8         |
| Permissions .....                                                     | 9         |
| <b>Motions</b> .....                                                  | <b>10</b> |
| Overview .....                                                        | 10        |
| Create/Edit motion .....                                              | 11        |
| Permissions.....                                                      | 12        |
| <b>Email templates</b> .....                                          | <b>13</b> |
| Overview .....                                                        | 13        |
| Create/Edit email template.....                                       | 14        |
| Permissions.....                                                      | 15        |
| <b>Meeting templates</b> .....                                        | <b>16</b> |
| Overview .....                                                        | 16        |
| Create/Edit meeting template .....                                    | 17        |
| Details .....                                                         | 17        |
| Motions .....                                                         | 18        |
| Notice .....                                                          | 19        |
| Minutes.....                                                          | 21        |
| Permissions.....                                                      | 23        |
| <b>Merge fields</b> .....                                             | <b>24</b> |
| Introduction .....                                                    | 24        |
| Example document .....                                                | 25        |
| Dynamic tables and blocks – Motions, Insurance.....                   | 26        |

## INTRODUCTION

The PIQ+ Meetings module manages each step in the meetings process and gives you access to a range of benefits.

### What you can do

- Customise your meeting settings.
- Manage global template libraries for motions, emails and meeting documents.
- Create and distribute meeting notices.
- Conduct the meeting and record motion results.
- Create and distribute meeting minutes.

### Benefits

- Flexible templates for meetings (motions, emails, notices and minutes) - you can create as many templates as you need.
- Customise motion outcomes to suit business and regulatory requirements. You'll be able to create any possible motion result and set your naming conventions, enable vote tally, enable mover/seconders.
- New merge field library with search, categories and field descriptors.
- New text editor offering more formatting and styling options including page breaks, and the ability to edit and preview the document live on screen without generating a PDF preview or navigating away from the screen.
- Automatically create meeting notice and minutes documents based on pre-selected templates.
- Collate all your documents in one meeting pack, preview and distribute to nominated recipients.

### Accessing PIQ+ Meetings

Once PIQ+ has been enabled on your account, you'll see a PIQ+ button in the top menu, next to the Log Out button.

You can access the meetings module through the PIQ+ button.

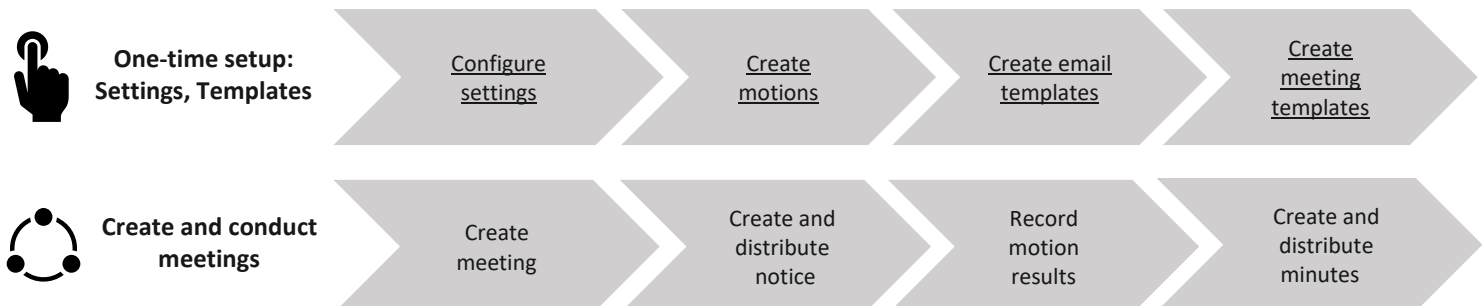


If you want access to PIQ+ but can't see this button, please email us at [support@propertyiq.com.au](mailto:support@propertyiq.com.au).

## MEETINGS WORKFLOW

Here's a high level view of the tasks involved in the setup and use of the PIQ+ Meetings module.

You can click on each of the one-time setup tasks for more information.



## ONBOARDING TASKS

You'll need to complete some one-off onboarding tasks related to settings and templates before you start using PIQ+ Meetings module.

Click on each task below for more information.

1. [Prepare users for single sign-on \(PIQ+ Readiness Wizard\)](#)
2. [Configure settings](#)
3. [Create motions](#)
4. [Create email templates](#)
5. [Create meeting templates](#)

## ONBOARDING TASKS

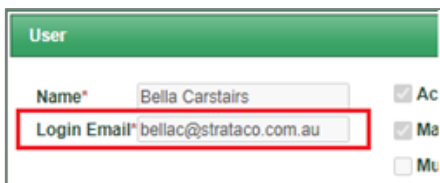
### PREPARE USERS FOR SINGLE SIGN-ON (PIQ+ READINESS WIZARD)

You'll need to run the PIQ+ Readiness Wizard for all users in your business as the first step of onboarding to PIQ+.

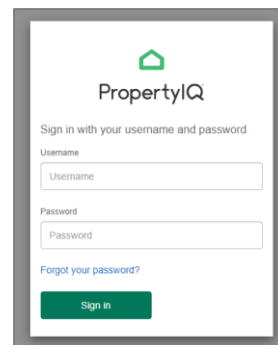
The PIQ+ Readiness Wizard:


- allows access to PIQ+
- enables single sign-on so users can navigate between PIQ and PIQ+ without logging in again
- forces users to login into PropertyIQ with a **unique email address** once the wizard is run
- updates you to the new log in screen for PropertyIQ.

**User login email:** (same as email field on user card)



**New log in screen:**




 **TIP** You only need to run the wizard **once** for your business. This will validate and enable all existing users in your PropertyIQ. When creating new users, they'll be automatically validated and enabled for PIQ+ as part of the creation process using the login email field.

## PREPARATION

Before running the wizard, you'll need to:

1. review and tidy up all your users under *Utilities>Security screen*
2. deactivate any redundant and/or unnecessary users
3. ensure each user has a **unique email address**.

 **TIP** The wizard screen will show you a preview of all your users and whether there are any issues with individual users. So you can edit and deactivate users from the PIQ+ Readiness Wizard screen as you go.

**!** **IMPORTANT** PIQ+ requires each user to have a unique email address that'll be used for logging in. If you have multiple users sharing the same email and/or a missing email address for a user, you'll need to update their user details in PropertyIQ.

## RUN THE WIZARD

Go to *Utilities>Security* screen.

1. Click the *PIQ+ Readiness Wizard* button.
2. *Pending* tab will show all users that have not been processed through the wizard and still need to be checked and validated.
3. *Completed* tab will show all users that have been processed through the wizard. These users have a valid email address and password and can successfully log into PIQ+.
4. *'Users with missing or non-unique emails'* - you need to **take action and update user details**. For the users that appear under this section, you will either need to:
  - a. Enter an email address for the user as it's missing; or
  - b. Update the email address for the user as the current one is not unique

Once you've updated the user, the table will automatically refresh to remove the user from this section. They will then appear in one of the other two sections to complete the process.

5. *'Users requiring a password reset'* – you just need to **click the Complete button** – see Step 6.  
The users in this section haven't reset their passwords for over 12 months and must firstly reset their passwords to be able to log into PIQ+. If these users are still required, you can automatically trigger a password reset by completing the next step – see Step 6. Otherwise, you can deactivate them by double clicking on them and selecting the *Deactivate* button on the user card.
6. Click the *Complete* button in the *'Users requiring a password reset'* section to trigger a password reset for the users displayed in the table. After clicking complete, the users will then appear in the *Completed* tab at the top of the screen and can successfully log into PIQ+ on their next login.
7. *'Users ready to move to PIQ+'* – you just need to **click the Complete button** – see Step 8.  
The users in this section have a valid email and password. Their email address will be used as their login once they're processed through the wizard – see Step 8.
8. Click the *Complete* button in the *'Users ready to move to PIQ+'* section to update the users login email. After clicking complete, the users will then appear in the *Completed* tab at the top of the screen and can successfully log into PIQ+ on their next login.

The screenshot shows the PropertyIQ Strata Security interface. The main window is titled 'Security' and contains a 'PIQ+ Readiness Wizard' panel. The wizard has three tabs: 'Pending', 'Completed', and 'Users ready to move to PIQ+'. The 'Completed' tab is active. The wizard is divided into three sections:

- Users with missing or non-unique emails:** This section contains a table with columns: Name, Login Email, Email, and Description. The Description column contains red text indicating issues, such as 'Email is shared with Caroline Fung, please specify a unique email address'.
- Users requiring a password reset:** This section contains a table with columns: Name, Login Email, Email, and Description. The Description column contains text indicating that passwords will be reset.
- Users ready to move to PIQ+:** This section contains a table with columns: Name, Login Email, Email, and Description. The Description column contains text indicating that login emails will be updated.

Numbered callouts (1-8) highlight key elements in the interface:

1. PIQ+ Readiness Wizard button
2. Pending/Completed tabs
3. Wizard title
4. Description column
5. Complete button
6. Complete button
7. Complete button
8. Complete button

## CONFIGURE SETTINGS

### TRANSITION PHASE – CHOOSE HOW YOU ADOPT THE FEATURE

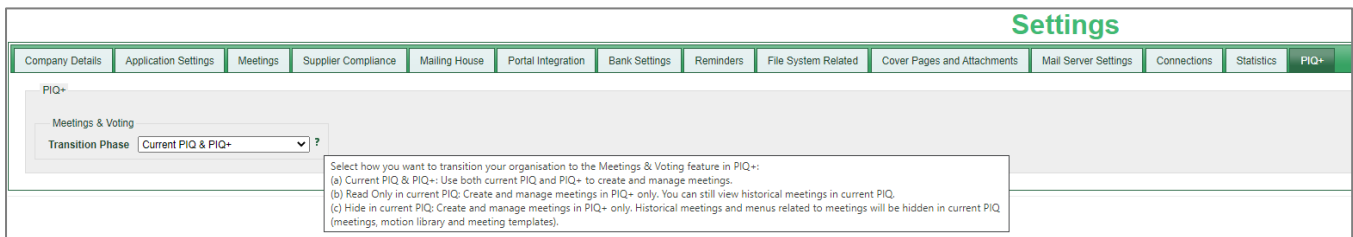
You can flexibly choose how PIQ+ Meetings module is rolled out and adopted in your business by using one of three transition phases. You can also change the transition phase from one to another at any time.

For example, you can trial PIQ+ Meetings for some meetings, while you continue to operate as you currently do in existing PropertyIQ 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 existing PropertyIQ.

There are three options for transition:

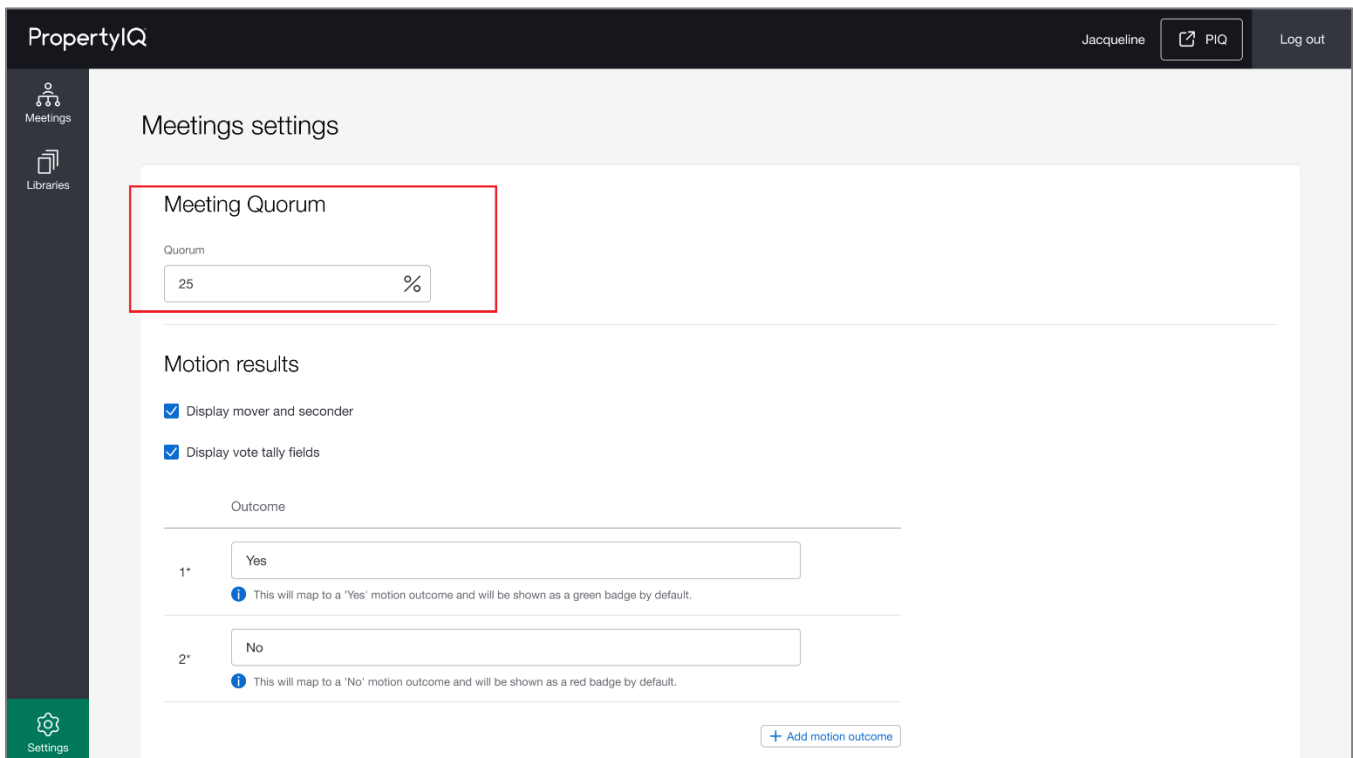
- 1. Current PIQ & PIQ+:** Create and view meetings in both existing PIQ and PIQ+
- 2. Read Only in current PIQ:** Create meetings in PIQ+ only, view historical meetings in current PIQ.
- 3. Hide in current PIQ:** Create meetings in PIQ+ only, historical meetings and menus related to meetings will be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



### QUORUM PERCENTAGE

In PIQ+ Settings menu, there's a *Meeting Quorum* field that's used when creating new meetings.



The quorum field in PIQ+ is populated using the existing quorum settings in PropertyIQ and is set:

- Globally under *Utilities>Settings>Meetings* tab. This global percentage will be synced to PIQ+ in the Quorum (%) field under the Settings menu.
- For each building under *Building card>Settings>Meetings* accordion. If a building percentage is set, it'll override the global percentage and will be used for any new meetings created in PIQ+ for that building.

**When creating a new meeting**, the quorum percentage will be pre-populated using the global quorum, or the building quorum if there is one. You can also override the quorum percentage for a specific meeting and enter a percentage manually.



**TIP** If you update the quorum percentage in PIQ+, it will not be synced back to PropertyIQ. If you need to update the quorum percentage and have it apply to future meetings, update the quorum percentage setting under *Utilities>Settings>Meetings* (globally) or *Building card>Settings>Meetings* (for a building).

Global setting for quorum under *Utilities>Settings>Meetings* tab:

| 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):                    |                      | <input checked="" type="checkbox"/> ? |                     |               |                    |               |           |                     |
| Include Attachment Names on Meeting Notices & Meeting Minutes: |                      | <input checked="" type="checkbox"/> ? |                     |               |                    |               |           |                     |
| Include generation details on Meeting PDFs headers:            |                      | <input checked="" type="checkbox"/> ? |                     |               |                    |               |           |                     |

Building setting for quorum under *Building card>Settings>Meetings* accordion:

| Building                       |       |                                                     |      |                                                                |        |           |           |
|--------------------------------|-------|-----------------------------------------------------|------|----------------------------------------------------------------|--------|-----------|-----------|
| Settings                       | Dates | Charges                                             | Info | Financials                                                     | Budget | Documents | Registers |
| S/Plan* 900                    |       | Address                                             |      | Street No 100 Street Name Pacific Parade                       |        |           |           |
| Manager* Anne Fluva            |       | Address 2                                           |      | Suburb DEE WHY State NSW                                       |        |           |           |
| Folio* NSW BRANCH              |       | Building Name Pacific Apartments                    |      | P/Code 2100                                                    |        |           |           |
| Building Type* Strata          |       | Total Lots - 1 (Primary - 1, Secondary - 0)         |      |                                                                |        |           |           |
| Building Sub Type* Residential |       | Active <input checked="" type="checkbox"/>          |      | All Inclusive Fees <input type="checkbox"/>                    |        |           |           |
| Building Class                 |       | Debt Collection <input checked="" type="checkbox"/> |      | Payment Plan <input type="checkbox"/>                          |        |           |           |
| Total UOE* 100                 |       | Electronic Voting                                   |      | Electronic Voting Approved <input checked="" type="checkbox"/> |        |           |           |
|                                |       | Resolution Date 01/02/2023                          |      | Quorum 10.00% ?                                                |        |           |           |
|                                |       | Resolution Date 01/02/2023                          |      | Utility Invoicing                                              |        |           |           |

## Quorum field on an individual meeting in PIQ+:

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'. Below the title is a rich text editor for 'Teleconference or videoconference information'. Further down, there are fields for 'Arrears cut-off date type' (set to 'Date of notice'), 'Arrears cut-off date' (set to '26/05/2023'), 'Cheque clearance date' (set to '14/10/2051'), and 'Quorum' (set to '25'). The 'Quorum' field is highlighted with a red box. At the bottom right, there are 'Cancel' and 'Save' buttons.

## MOTION RESULTS

You can customise what you see and use on the *Results screen* of a meeting using the motion results settings.

- Enable/disable mover and seconder fields.
- Enable/disable vote tally fields.
- Set naming conventions and options for motion outcomes e.g. carried, defeated, withdrawn, out of order etc.

These settings will flow into the meeting workflow, such as when you're [creating motions](#), recording meeting results and creating meeting minutes.

The screenshot shows the 'PropertyIQ' interface for 'Meetings settings'. The user is logged in as 'Jacqueline'. The page title is 'Meetings settings'. Under the 'Meeting Quorum' section, the 'Quorum' field is set to '25'. Below this is the 'Motion results' section, which is highlighted with a red box. It contains two checked options: 'Display mover and seconder' and 'Display vote tally fields'. Under 'Outcome', there are two fields: '1\* Yes' and '2\* No'. Each field has a tooltip: 'This will map to a 'Yes' motion outcome and will be shown as a green badge by default.' and 'This will map to a 'No' motion outcome and will be shown as a red badge by default.' respectively. At the bottom right of the 'Motion results' section, there is a '+ Add motion outcome' button.



## Motion results options

Once enabled, these options will appear in the *Meeting Results screen* for all meetings.

- **Display mover and seconder:** Enable this setting to record the mover and seconder in Meeting Results.
- **Display vote tally fields:** Enable this setting to record the vote tallies for each motion in Meeting Results. Tallies are displayed for Yes, No, Abstain and Invalid.

When changing any motion result settings:

- changes will be reflected immediately for new meetings that are created; and
- for existing meetings, settings will only update upon editing the meeting.

*Example of meeting results screen when these are enabled:*

| Mover               | Seconder                 | Yes | No | Abstain | Invalid |
|---------------------|--------------------------|-----|----|---------|---------|
| Fiona Chang - Lot 1 | Matthew Thompson - Lot 5 | 5   | 1  | 1       | 1       |

## Motion outcomes

Motion outcomes will appear in *Motions* and *Meeting Results screen* in a meeting. It will also appear in Meeting Minutes document if the *Motion for minutes merge* field is used in the meeting template minutes document.

- Customise outcomes based on the terminology used in your state and company preferences.
- The “Yes” and “No” motion outcomes will be provided by default and are mandatory. You can still customise the name of these two outcomes e.g. change ‘yes’ to ‘carried’
- Add additional outcomes by clicking *Add motion outcome* button.
- Remove additional outcomes by clicking *Remove*.

When changing motion outcomes (add, edit, remove):

- name changes will be reflected immediately for any new motions created; and
- for existing motions, the name will only update upon editing the motion.
- When adding or removing outcomes, they will automatically be added/removed to all Motions. For new outcomes, you’ll need to go to each motion and add text to the outcome field for the minutes; it will then appear in the meeting minutes. For more information on creating/editing motions, see [Create/Edit Motion](#).

## PERMISSIONS

Access to PIQ+ Settings will be determined by the user permissions set in PropertyIQ under *Utilities>Security* menu.

- **View:** Users with Utilities>Security>Role>Utilities - Settings = View permission in PIQ can view Meetings Settings in read-only mode.
- **Edit:** Users with Utilities>Security>Role>Utilities - Settings = Edit permission can make changes to Meetings Settings in PIQ+.

If you think you have the wrong permissions, please contact your administrator to update your role permission 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+.

## MOTIONS

### OVERVIEW

All motions that are created in PIQ+ are stored in a central location called the Motions library.

Motions are one of the building blocks for creating and conducting meetings in PIQ+. You will add motions to [Meeting templates](#), which will then be used to create meetings. With the help of merge fields and conditional logic, all of your motions for a meeting will be grouped into a 'Motions block' merge field and flow into your meeting notices and minutes, saving you time and ensuring consistency in the content of your meetings.

#### In the motions library, you can

- View motions in the library
- Create a new motion
- Edit an existing motion
- Duplicate an existing motion
- Archive a motion

#### Important callouts on system behaviour

##### Creating

- 'Folio' and 'Applies to' fields cannot be changed once it's been created.

##### Editing

- Any updates to a motion will be reflected in global meeting template/s under *Libraries>Meeting templates* if that motion has been included.
- Any updates to a motion will **NOT** affect or be reflected in existing meetings under *Meetings page*.

##### Archiving

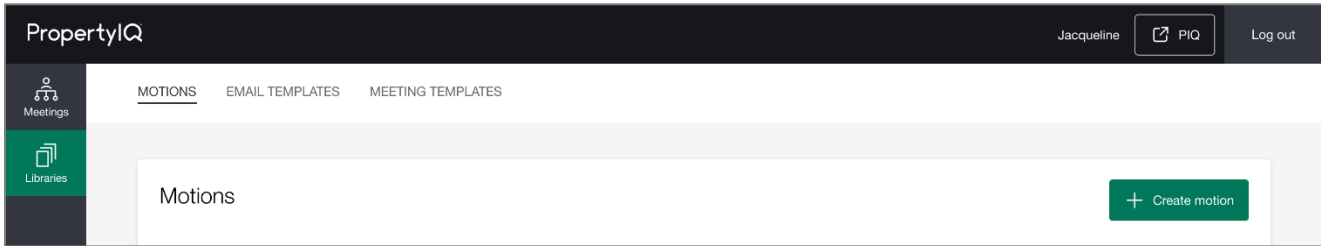
- Once a motion is archived, it cannot be unarchived.
- Archived motions cannot be edited.

1. Go to *Libraries* menu.
2. Go to *Motions* tab.
3. Sort the list of motions by clicking on any of the column headings.
4. View all motions in the list. Click on any motion in the list to open, view and edit the motion.
5. Using the action menu, duplicate or archive a motion.
6. Enable the filter to view archived motions in the list.
7. Create a new motion.

| Title                                                                               | Folio  | Motion type | Resolution type          | Meeting type               | Last updated               |
|-------------------------------------------------------------------------------------|--------|-------------|--------------------------|----------------------------|----------------------------|
| <a href="#">Accept minutes or previous meeting</a><br>Accept minutes (updated 2023) | Global | Statutory   | Ordinary resolution w... | AGM, General, Committ...   | 08/05/2023 by Jacquelin... |
| <a href="#">Annual Fire Safety Statement</a><br>AFSS contractor                     | Global | Statutory   | Ordinary resolution w... | AGM, General, Inaugural... | 08/05/2023 by Jacquelin... |
| <a href="#">Arrears recovery</a><br>Part 5 levy recovery by SM and SC               | Global | Statutory   | Ordinary resolution w... | AGM, General               | 08/05/2023 by Jacquelin... |
| <a href="#">Budget</a><br>Expense budget                                            | Global | Statutory   | Ordinary resolution w... | AGM, General, Inaugural... | 08/05/2023 by Jacquelin... |
| <a href="#">Building noticeboard</a><br>Affix noticeboard to common property        | Global | Committee   | Ordinary resolution w... | AGM, General, Committ...   | 08/05/2023 by Jacquelin... |
| <a href="#">Capital works fund</a><br>Works to upgrade                              | Global | Statutory   | Ordinary resolution w... | AGM, General, Inaugural... | 08/05/2023 by Jacquelin... |
| <a href="#">Insurance</a><br>Review of insurance                                    | Global | Statutory   | Ordinary resolution w... | AGM, General, Inaugural... | 08/05/2023 by Jacquelin... |

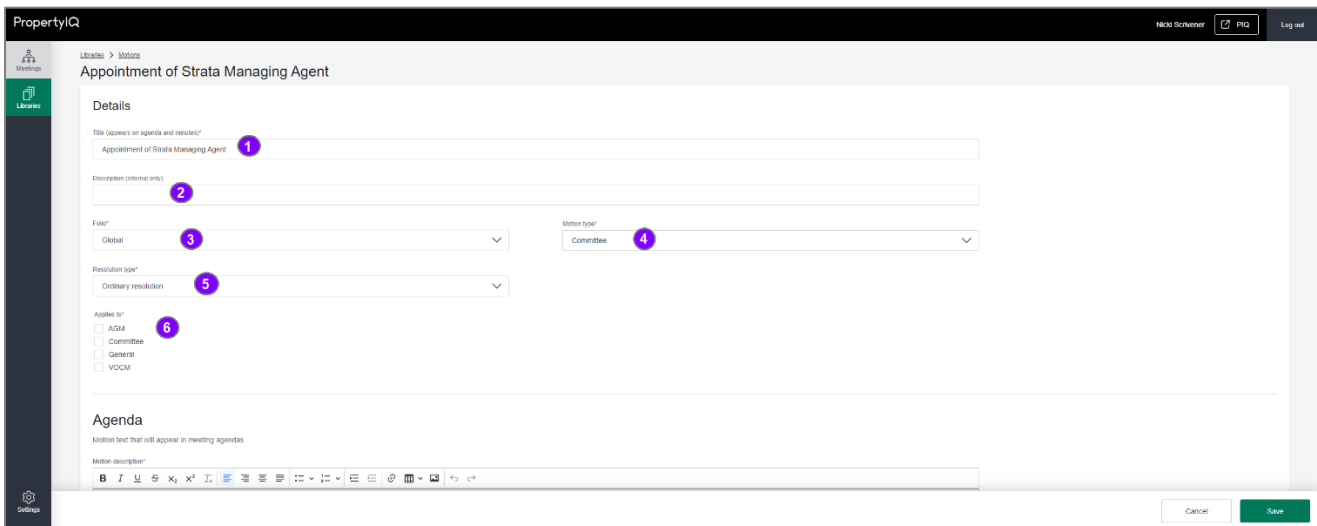
## CREATE/EDIT MOTION

Use the **+Create motion** button under *Libraries>Motions tab* to create a new motion.

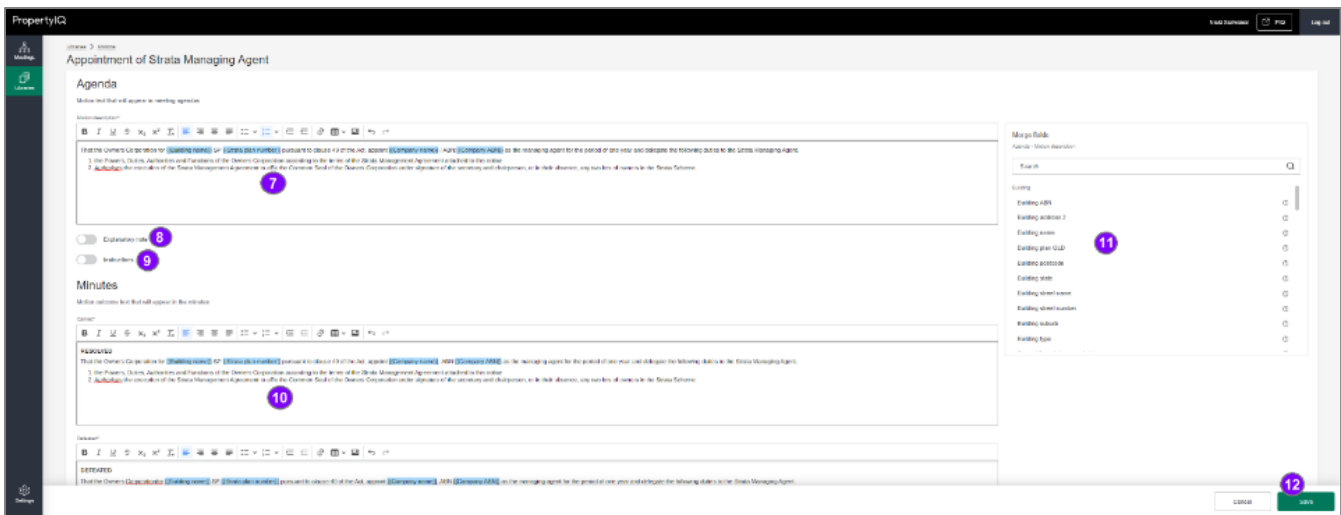


1. Enter the motion title. This will appear on agenda and minutes.
2. Enter an optional internal description.
3. Select whether this motion is used globally or for a specific folio. This dropdown will display 'Global' and a list of all folios in your PropertyIQ. **NOTE:** You will not be able to change this once the motion is created.
4. Select the motion type. Options are Statutory, Owner and Committee.
5. Select the resolution type. This displays a list of available types across all States, so just select what's applicable for you.
6. Select which type/s of meetings this motion applies to. You can select one or multiple.

For example, when viewing or creating AGM meetings and meeting templates, you can only see and add motions applicable to an AGM. **NOTE:** You will not be able to change this once the motion is created.



7. Add the motion description for the **Agenda**. You can drag and drop, or click and insert, merge fields from the list on the right – see item 11. Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.
8. Optionally include an explanatory note for the motion.
9. Optionally include voting instructions for the motion.
10. Add the motion description for the **Minutes**. You can drag and drop, or click and insert, merge fields from the list on the right – see item 11. Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.
  - a. You will need to add a description for each possible motion outcome.
  - b. Motion outcomes (what options you see, naming conventions) are all determined by the settings for motion results. See [Configure Settings>Motion Results](#) for more information.
11. Add merge fields to your text using the merge field library. You can search, drag/drop or click and insert any fields that may be required. See [Merge Fields](#) for more information on using merge fields.
12. Click *Create* or *Save* to save the motion



## PERMISSIONS

Access to the motions library will be determined by the user permissions set in PropertyIQ under *Utilities>Security* menu.

### View, create, duplicate, edit and archive motions

- **View:** Users with *Utilities>Security>Role>Utilities - Motions Library = View* can view the motions library and any motion in the library in read-only mode.
- **Create and Duplicate:** Users with *Utilities>Security>Role>Utilities - Motions Library = Add* can create and duplicate motions.
- **Edit and Archive:** Users with *Utilities>Security>Role>Utilities - Motions Library = Edit* can edit and archive motions.

### User data access restrictions

- Users with *Utilities>Security>Role>Data Access Restriction = No Data Access Restriction* can work with motions belonging to global and all folios.
- Users with *Utilities>Security>Role>Data Access Restriction = Restrict to Data In Users Folios* can only work with motions 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 motions belonging to global, Folio A and Folio B.
- Users with *Utilities>Security>Role>Data Access Restriction = Restrict to Data in Buildings Managed by User* can only work with motions 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 motions belonging to Global, Folio X and Folio Y.

If you think you have the wrong permissions, please contact your administrator to update your role permission 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+.

OVERVIEW

All email templates used for meetings are created in PIQ+ and are 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 be used to create Meetings.

**In the Email Templates library, you can**

- View email templates in the library
- Create a new email template
- Edit an existing email template
- Archive an email template

**Important callouts on system behaviour**

Creating

- ‘Folio’ and ‘Type’ fields cannot be changed once it’s been created.

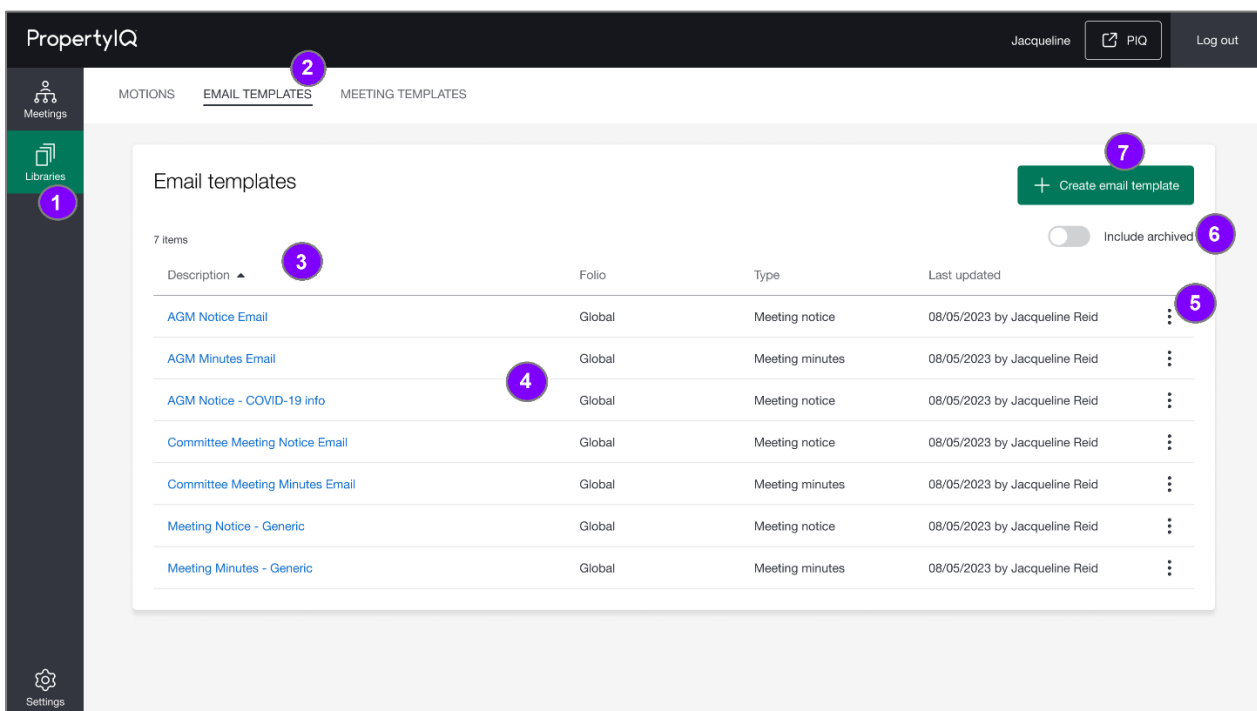
Editing

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

Archiving

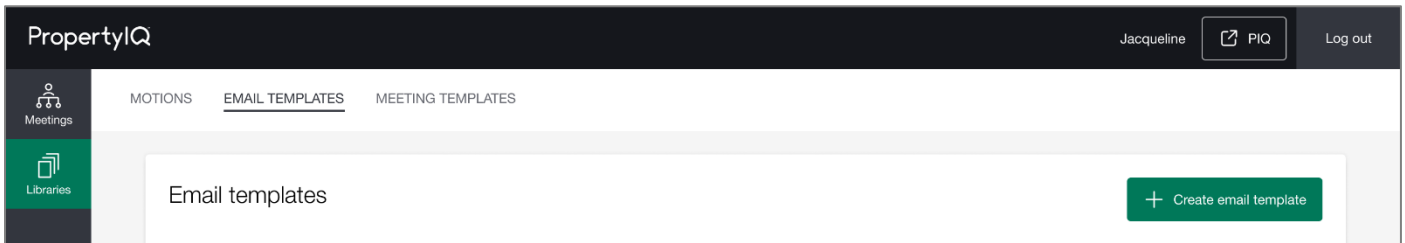
- An email template cannot be archived if it’s linked to any active Meeting template/s; you’ll be notified if it’s in use when trying to archive. Before you can archive, you will need to select a new email template for those meeting templates.
- Once an email template is archived, it cannot be unarchived.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

1. Go to *Libraries* menu.
2. Go to *Email Templates* tab.
3. Sort the list of email templates by clicking on any of the column headings.
4. View all email templates in the list. Click on any email template in the list to open, view and edit.
5. Using the action menu you can archive an email template.
6. Enable the filter to view archived email templates in the list.
7. Create a new email template.

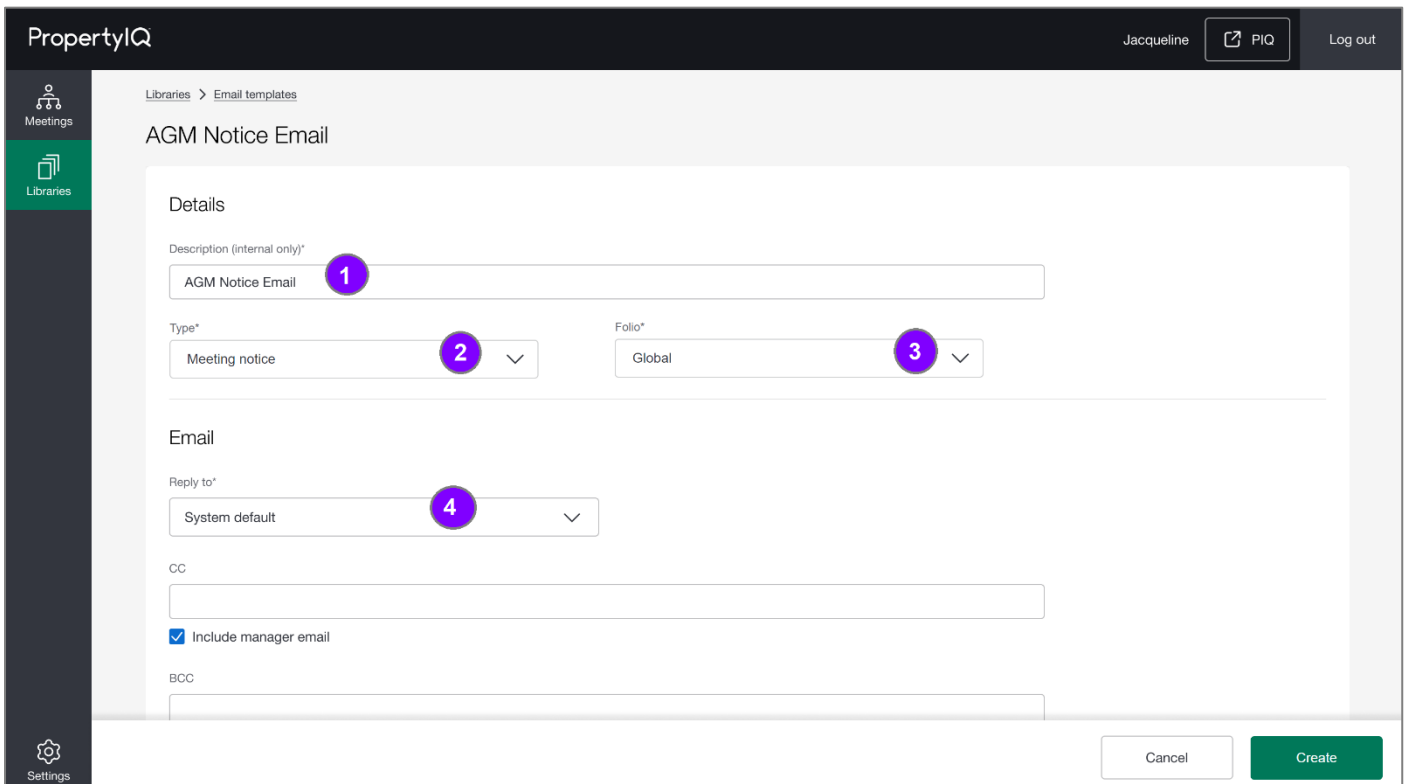


## CREATE/EDIT EMAIL TEMPLATE

Use the **+Create email template** button under *Libraries>Email Templates* tab to create a new email template.



1. Enter the *Description*. This is for internal use only to assist with identification.
2. Select the *Type* from the two options: Meeting notice or Meeting minutes.  
This will determine if it's used for distributing meeting notices or minutes. You will only be able to view and link email templates of the right type under the notices or minutes sections of a meeting template.  
**NOTE:** You will not be able to change this once the email template is created.
3. Select whether this email template is used globally or for a specific folio. This dropdown will display 'Global' and a list of all folios in your PropertyIQ. **NOTE:** You will not be able to change this once the email template is created.
4. Select the *Reply To* email address. Options are System Default, Manager, Other. System Default is selected by default.  
**NOTE:** If selecting Other, only one email address is accepted at a maximum of 255 characters.



5. Add 'CC' recipients by entering one or more email addresses. Separate multiple email address with a semi-colon ( ; ). You can also tick the 'Include manager email' checkbox as a shortcut to always CC the manager for these emails.
6. Add 'BCC' recipients by entering one or more email addresses. Separate multiple email address with a semi-colon ( ; ). You can also tick the 'Include manager email' checkbox as a shortcut to always BCC the manager for these emails.
7. Add an email subject. You can drag and drop, or click and insert, merge fields from the list on the right – see item 9.
8. Add email body text. You can drag and drop, or click and insert, merge fields from the list on the right – see item 9. Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.
9. Add merge fields to your text using the merge field library. You can search, drag/drop or click and insert any fields that may be required. See [Merge Fields](#) for more information on using merge fields.
10. Click *Create* or *Save* to save the email template.

## PERMISSIONS

Access to the email templates library will be determined by the user permissions set in PropertyIQ under *Utilities>Security* menu.

### View, create, edit and archive email templates

- **View:** Users with *Utilities>Security>Role>File – Email Templates = View* can view the email templates library and any email template in the library in read-only mode.
- **Create:** Users with *Utilities>Security>Role> File – Email Templates = Add* can create email templates.
- **Edit and Archive:** Users with *Utilities>Security>Role> File – Email Templates = Edit* can edit and archive email templates.

### User data access restrictions

- Users with *Utilities>Security>Role>Data Access Restriction = No Data Access Restriction* can work with email templates belonging to global and all folios.
- Users with *Utilities>Security>Role>Data Access Restriction = Restrict to Data In Users Folios* 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.
- Users with *Utilities>Security>Role>Data Access Restriction = Restrict to Data in Buildings Managed by User* 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 email templates belonging to Global, Folio X and Folio Y.

If you think you have the wrong permissions, please contact your administrator to update your role permission 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+.

## OVERVIEW

All meeting templates that are created in PIQ+ are stored in a central location called the Meeting Templates library

Meeting templates serve as a starting point for creating new meetings with the same motions, notice and minutes document content. You can add motions, create the notice and minutes document templates, add merge fields and link email templates to a meeting template. This meeting template can then be linked to a meeting and all the pre-defined data from the meeting template will be copied into the meeting.

The purpose of a meeting template is to save time by providing a consistent structure and design, and can ensure all documents adhere to a particular standard, for example formatting or using the right merge fields.

**In the Meeting Templates library, you can**

- View meeting templates in the library
- Create a new meeting template
- Edit an existing meeting template
- Archive a meeting template

**Important callouts on system behaviour**

- 'Meeting Type' and 'Folio' fields cannot be changed once it's been created.
- Merge fields play a role in the creation of your meeting templates. See [Merge Fields](#) for detailed information on merge field behaviour and the merge field library.
  - Merge fields added to a meeting template will only be populated with data in a meeting (where data is available).
  - You will not be able to add merge fields in a notice or minutes document in a meeting. You can only add merge fields from within a template.
- When adding motions to a meeting template, the motions list will only show all active motions that:
  - belong in the same folio as the meeting template or are global; and
  - are created for the same meeting type as the meeting template. For example, if the template's meeting type = AGM, only motions which apply to AGM will be displayed in the list.

1. Go to *Libraries* menu.
2. Go to *Meeting Templates* tab.
3. Sort the list of meeting templates by clicking on any of the column headings.
4. View all meeting templates in the list. Click on any meeting template in the list to open, view and edit.
5. Using the action menu you can archive a meeting template.
6. Enable the filter to view archived meeting templates in the list.
7. Create a new meeting template.

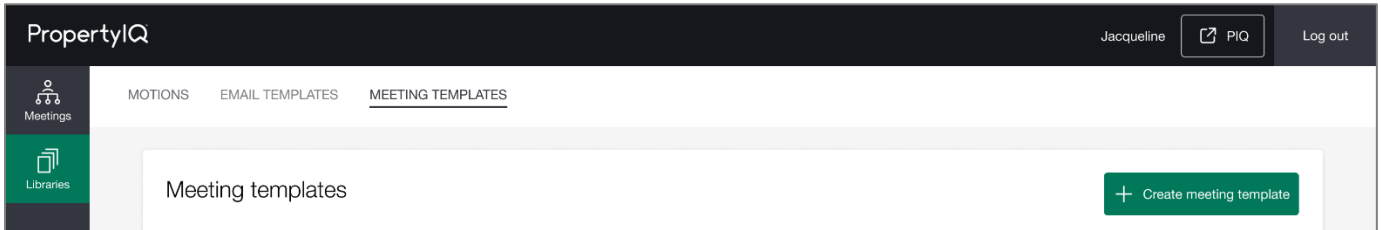
The screenshot displays the 'Meeting templates' library in PropertyIQ. The interface includes a sidebar with 'Meetings' and 'Libraries' (1), a top navigation bar with 'MOTIONS', 'EMAIL TEMPLATES', and 'MEETING TEMPLATES' (2), and a 'Create meeting template' button (7). The main area shows a table of 8 items with columns: Description (3), Folio, Meeting type, and Last updated. A 'Include archived' toggle (6) is located in the top right of the table area. The table lists various meeting templates, each with a three-dot action menu (5) for editing or archiving. The table data is as follows:

| Description                                  | Folio  | Meeting type | Last updated                |
|----------------------------------------------|--------|--------------|-----------------------------|
| Annual General Meeting - Large Scheme        | Global | AGM          | 08/05/23 by Jacqueline Reid |
| Annual General Meeting - Small Scheme        | Global | AGM          | 08/05/23 by Jacqueline Reid |
| Committee meeting - generic                  | Global | Committee    | 08/05/23 by Jacqueline Reid |
| Committee meeting - pet approval             | Global | Committee    | 08/05/23 by Jacqueline Reid |
| Extraordinary General Meeting - generic      | Global | General      | 08/05/23 by Jacqueline Reid |
| Extraordinary General Meeting - special levy | Global | General      | 08/05/23 by Jacqueline Reid |
| Inaugural AGM                                | Global | Inaugural    | 08/05/23 by Jacqueline Reid |
| VOCM                                         | Global | VOCM         | 08/05/23 by Jacqueline Reid |



## CREATE/EDIT MEETING TEMPLATE

Use the **+Create meeting template** button under *Libraries>Meeting Templates* tab to create a new meeting template.



### Details

1. Select the *Meeting Type*. The options are: AGM, Committee, General and VOCM.  
**NOTE:** You will not be able to change this once the meeting template is created.
2. Select whether this meeting template is used globally or for a specific folio. This dropdown will display 'Global' and a list of all folios in your PropertyIQ. **NOTE:** You will not be able to change this once the meeting template is created.
3. Enter an optional internal description.
4. Select an email template that will be used for distribution of the meeting **notice**.  
**NOTE:** This list will only display email templates applicable to the Email type (notice), Meeting type and Folio selected in Steps 1 & 2.
5. Select an email template that will be used for distribution of the meeting **minutes**.  
**NOTE:** This list will only display email templates applicable to the Email type (minutes), Meeting type and Folio selected in Steps 1 & 2.
6. Click *Create* or *Save* to save the meeting template.

A screenshot of the 'Create meeting template' form in the PropertyIQ application. The form is titled 'Create meeting template' and is divided into three sections: 'Details', 'Notice Distribution', and 'Minutes Distribution'. Each section contains a dropdown menu for selecting a template. The 'Details' section has three fields: 'Meeting type\*' (set to 'AGM'), 'Folio\*' (set to 'Global'), and 'Description (internal only)\*' (set to 'Annual General Meeting - Small Scheme'). The 'Notice Distribution' section has one field: 'Notice email template\*' (set to 'AGM Notice Email'). The 'Minutes Distribution' section has one field: 'Minutes email template\*' (set to 'AGM Minutes Email'). At the bottom right of the form, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a green circle and the number '6'. The other fields are highlighted with purple circles and numbers 1 through 5.

## Motions

Once the meeting template is created, you can add, reorder, remove and create motions all from the Motions tab.

1. Go to *Motions* tab.
2. Using the *+Add motions* button, add motions to your meeting template from the global [Motions library](#).
3. Any motions you add to your template will display in the list.
4. Reorder the motions by clicking and dragging the motion to the desired position in the list.  
**NOTE:** The motions will display in the same order in a meeting as they do here in the template.
5. Preview a motion by clicking the preview icon. The preview will open in a new tab.
6. Remove a motion by clicking the *Remove* button.

PropertyIQ

Jacqueline Log out

Libraries > Meeting templates

### Annual General Meeting – Small Scheme

AGM • Global **1**

Details **Motions** Notice Minutes

**2**

|          | Title                                                                 | Motion type | Resolution type     |  |  |
|----------|-----------------------------------------------------------------------|-------------|---------------------|--|--|
| <b>4</b> | 1 Accept minutes of previous meeting<br>Accept minutes (updated 2023) | Statutory   | Ordinary resolution |  |  |
|          | 2 Statement of accounts<br>Financial statements <b>3</b>              | Statutory   | Ordinary resolution |  |  |
|          | 3 Levy contributions<br>Section 79 (1) and 79 (2)                     | Statutory   | Ordinary resolution |  |  |
|          | 4 Captial works funds<br>Major works <b>5</b>                         | Statutory   | Ordinary resolution |  |  |
|          | 5 Recovering overdue levies<br>Authorise managing agent or SC         | Statutory   | Ordinary resolution |  |  |
|          | 6 Insurance<br>Review of insurance                                    | Statutory   | Ordinary resolution |  |  |
|          | 7 Strata committee<br>Election                                        | Statutory   | Ordinary resolution |  |  |

**6**

Settings

## Notice

1. Go to *Notice* tab.
2. On the *Documents* sub-tab you can create, edit and preview your notice document.
3. On the *Distribution* sub-tab you can preview the email template that is already linked to the notice for distribution, and also change/edit the template if required. See screenshot below for example.
4. Click the *Edit* button to create and edit content for your meeting notice. **NOTE:** See Steps 7-10 for more information.
5. You can preview the notice document live on screen here.
6. You can also preview the notice document as a PDF/Print output by selecting the PDF icon here.

### Documents sub-tab:

PropertyIQ

Jacqueline Log out

Libraries > Meeting templates

### Annual General Meeting – Small Scheme

AGM • Global

Details Motions **Notice** Minutes

**2** Document **3** Distribution **4**

**6** PDF **5** Edit

#### Notice of Annual General Meeting

Owners Corporations Act 2006 Section 72, Owners Corporations Regulations 2018 and Owners Corporation Rules. This Notice must be given to each Lot Owner 14 days before the meeting.

For OWNERS CORPORATION PLAN OF SUBDIVISION: {{Strata plan number}} - {{Building name}} ,  
{{Building street number}} {{Building street name}} , {{Building suburb}} {{Building state}} {{Building postcode}}

The Annual General Meeting for the Owners Corporation will be held:

| Date                    | Time             | Venue                                                                                                         | Join online                    |
|-------------------------|------------------|---------------------------------------------------------------------------------------------------------------|--------------------------------|
| {{Meeting date (long)}} | {{Meeting time}} | {{Meeting venue name}}<br>{{Meeting venue address}}<br>{{Meeting venue suburb}}<br>{{Meeting venue postcode}} | {{Teleconference information}} |

#### Agenda

{{Motions for agenda}}

### Distribution sub-tab:

PropertyIQ

Jacqueline Log out

Libraries > Meeting templates

### Annual General Meeting – Small Scheme

AGM • Global

Details Motions **Notice** Minutes

Document **Distribution**

#### Email template

Use an existing email template for sending the notice

Linked email template

[AGM Notice Email](#)

Edit

## Notice document – Edit mode:

- Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.
- Add the content to your meeting notice here.
- Add merge fields to your text using the merge field library. You can search, drag/drop or click and insert any fields that may be required. See [Merge Fields](#) for more information on using merge fields.
- Click **Save** to save your changes to the meeting notice.



### TIPS

- Make sure you use the merge field **{{Motions for agenda}}** to merge your motions into the meeting notice document. This merge field block will include all motions from your meeting template AND any adhoc motions added in a meeting.
- Use **page breaks** between motions where required. See note on page breaks below.

PropertyIQ

Jacqueline | PIQ | Log out

Libraries > Meeting templates > Annual General Meeting – Small Scheme > Notice > Document

7 Heading 1

8

## Notice of Annual General Meeting

Owners Corporations Act 2006 Section 72, Owners Corporations Regulations 2018 and Owners Corporation Rules. This Notice must be given to each Lot Owner 14 days before the meeting.

For OWNERS CORPORATION PLAN OF SUBDIVISION: **{{Strata plan number}}** - **{{Building name}}** ,  
**{{Building street number}}** **{{Building street name}}** , **{{Building suburb}}** **{{Building state}}** **{{Building postcode}}**

The Annual General Meeting for the Owners Corporation will be held:

| Date                           | Time                    | Venue                                                                                                                                     | Join online                           |
|--------------------------------|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|
| <b>{{Meeting date (long)}}</b> | <b>{{Meeting time}}</b> | <b>{{Meeting venue name}}</b><br><b>{{Meeting venue address}}</b><br><b>{{Meeting venue suburb}}</b><br><b>{{Meeting venue postcode}}</b> | <b>{{Teleconference information}}</b> |

Agenda

**{{Motions for agenda}}**

9

Merge fields

Search

Building

- Building ABN
- Building address 2
- Building name
- Building plan QLD
- Building postcode
- Building state
- Building street name
- Building street number
- Building Type. See Building / Building type e.g. Strata, Company, Community, Neighbourhood
- Common law name

10

Cancel Save

## Page breaks:

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 Management Agent  
 Ordinary resolution  
 That the Owners Corporation, pursuant to clause 21.304 of the Strata Management Agreement attached to the Strata Scheme, appoints **21 304** as the managing agent for the period of one year.  
 1. the Powers, Duties, Authorities and Functions of the Managing Agent  
 2. 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

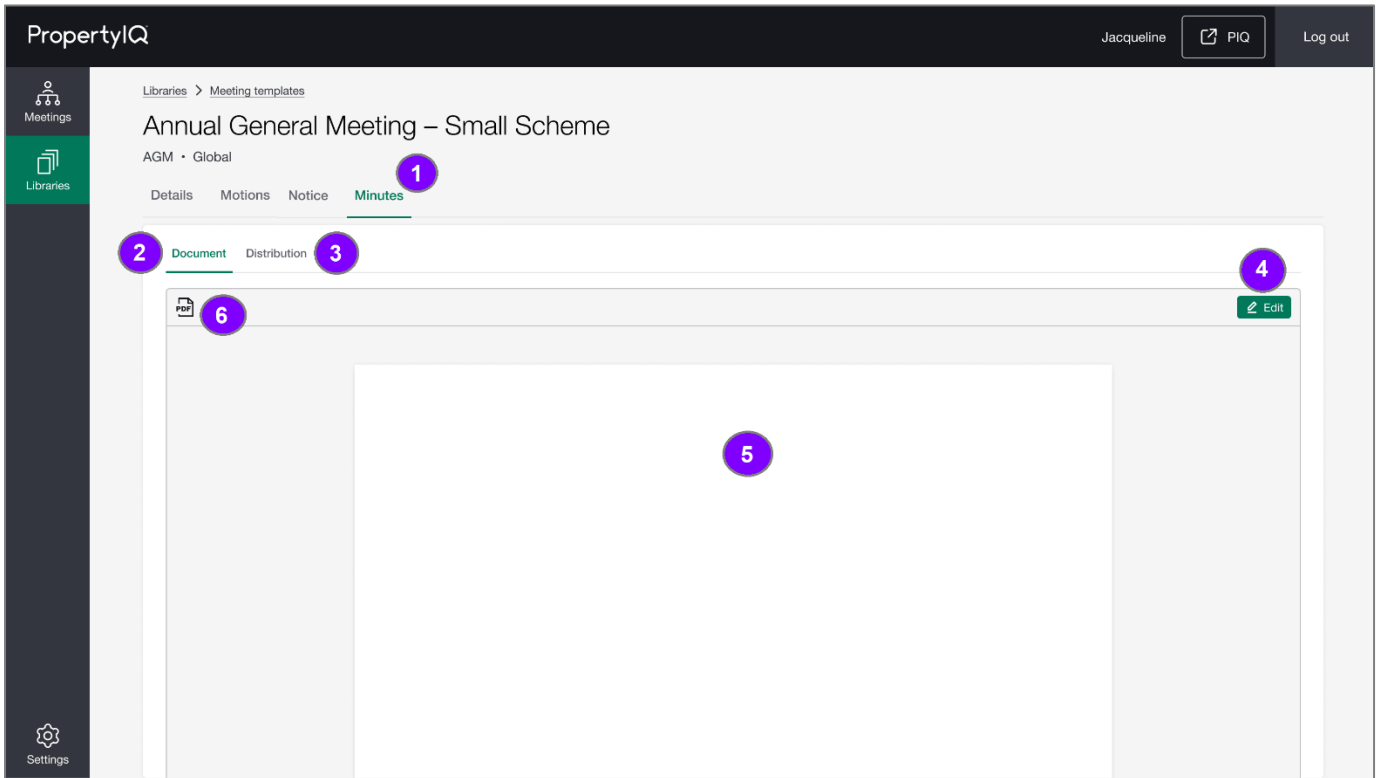
Insert a page break between motions in the Motions block by clicking the page break icon.

The natural break between pages is displayed by the dotted line and page number.

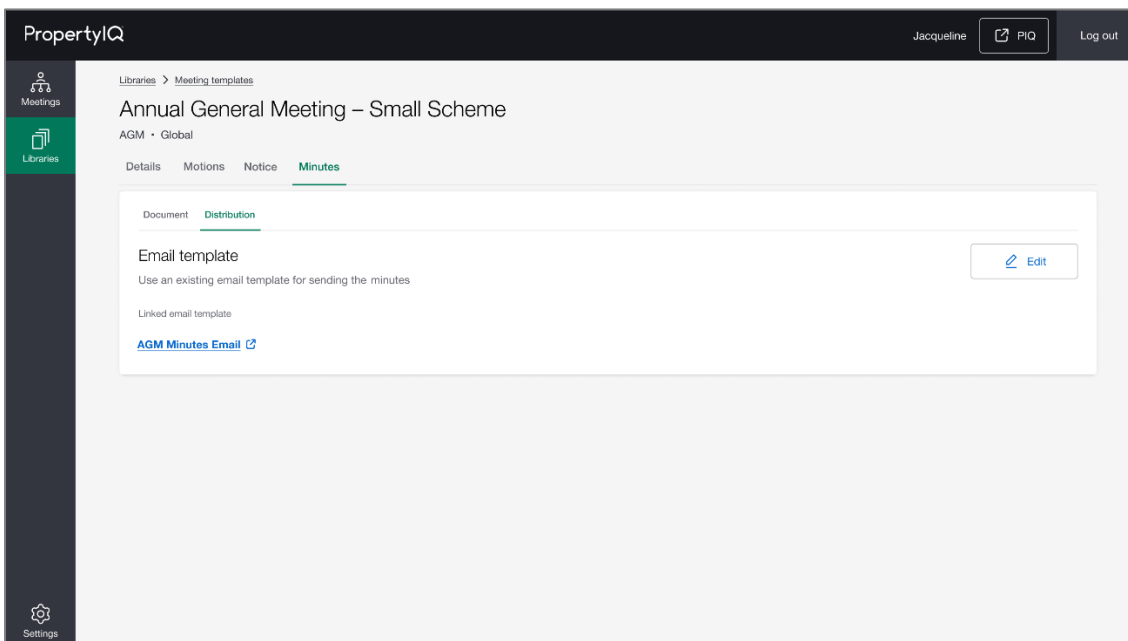
## Minutes

1. Go to *Minutes* tab.
2. On the *Documents* sub-tab you can create, edit and preview your minutes document.
3. On the *Distribution* sub-tab you can preview the email template that is already linked to the minutes for distribution, and also change/edit the template if required. See screenshot below for example.
4. Click the *Edit* button to create and edit content for your meeting minutes. **NOTE:** See Steps 7-10 for more information.
5. You can preview the minutes document live on screen here.
6. You can also preview the minutes document as a PDF/Print output by selecting the PDF icon here.

### Documents sub-tab:



### Distribution sub-tab:



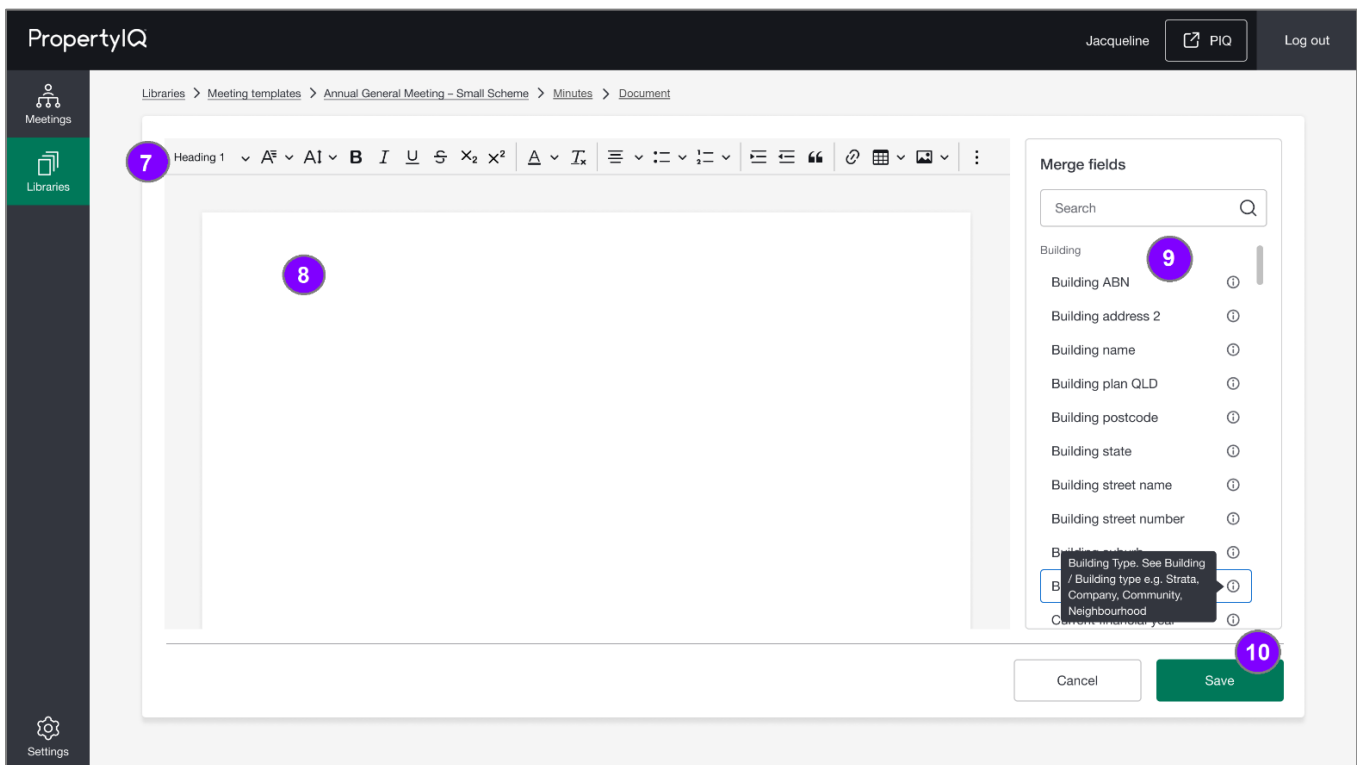
**Minutes document – Edit mode:**

7. Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.
8. Add the content to your meeting minutes here.
9. Add merge fields to your text using the merge field library. You can search, drag/drop or click and insert any fields that may be required. See [Merge Fields](#) for more information on using merge fields.
10. Click **Save** to save your changes to the meeting minutes.

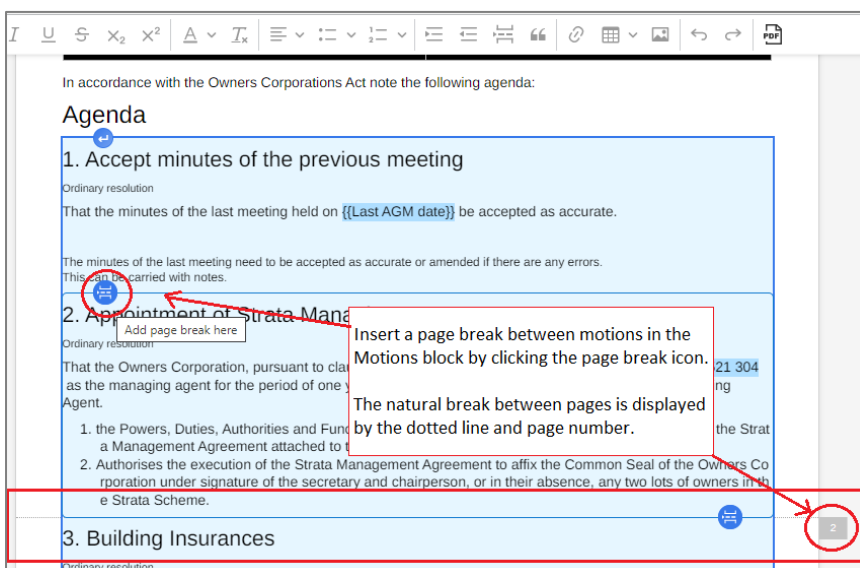


**TIPS**

- Make sure you use the merge field **{{Motions for minutes}}** to merge your motions into the meeting minutes document. This merge field block will include all motions from your meeting template AND any adhoc motions added in a meeting.
- Use **page breaks** between motions where required. See note on page breaks below.



**Page breaks:**



---

## PERMISSIONS

Access to the meeting templates library will be determined by the user permissions set in PropertyIQ under *Utilities>Security* menu.

### View, create, edit and archive meeting templates

- **View:** Users with *Utilities>Security>Role>File – Meeting Templates = View* can view meeting templates and any meeting template in the library in read-only mode.
- **Create:** Users with *Utilities>Security>Role> File – Meeting Templates = Add* can create meeting templates.
- **Edit and Archive:** Users with *Utilities>Security>Role> File – Meeting Templates = Edit* can edit and archive meeting templates, including details, motions, attachments, notice and minutes content.

### User data access restrictions

- Users with *Utilities>Security>Role>Data Access Restriction = No Data Access Restriction* can work with meeting templates belonging to global and all folios.
- Users with *Utilities>Security>Role>Data Access Restriction = Restrict to Data In Users Folios* can only work with meeting 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 meeting templates belonging to global, Folio A and Folio B.
- Users with *Utilities>Security>Role>Data Access Restriction = Restrict to Data in Buildings Managed by User* can only work with meeting 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.

If you think you have the wrong permissions, please contact your administrator to update your role permission 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+.

### INTRODUCTION

Merge fields play a role in the creation of:

- Motions
- Email templates
- Meeting templates – notice documents and minutes documents

#### Features of the merge field library

When adding merge fields to your content, there are several features that will help you easily find fields and understand where data is synced from for each merge field.

- **Descriptors:** hover over the information icon to see a description of the merge field. Descriptors will include a path to where data for each merge field will be sourced and how the data will be formatted.
- **Categories:** merge fields are organised into meaningful categories:
  - Building
  - Company
  - Financial
  - Meeting
- **Search:** search for merge fields using keywords.
- **Drag and drop:** you can drag and drop each merge field container to its desired position in your content.

#### Important callouts on system behaviour

- You cannot add or change merge fields within a notice or minutes document of an individual meeting (the merge field list is not available). Merge fields can only be added to templates; motions, emails and meeting templates.
- A merge field that is added to a field or document cannot be modified i.e. you cannot change the merge field text. However, you will be able to apply styling and formatting to the field as a whole.
- The merge fields called 'Motions for agenda' and 'Motions for minutes' cannot be added into Motions. They are only available within Meeting Templates.
- There is special behaviour for some merge fields. See [Dynamic tables and blocks](#) below for more information.

#### Where does the data come from?

The data for most merge fields is synced from PropertyIQ, from places such as the building card, lot card, financials, insurance, budget, application settings and company details. The merge fields for meeting details are taken from the meeting itself.

#### What do the merge fields look like?

Merge fields are displayed in the moustache format e.g. {{Merge field}} within a blue container once added to a field or document. Merge fields can be presented as simple inline fields, dynamic table or blocks.

- See [Dynamic tables and blocks](#) below for more information.
- See [below](#) an example document with merge fields.



## EXAMPLE DOCUMENT

Fields view in PIQ+ for a meeting template. When viewing merge fields in a **template**, it will only display the merge field name and not any actual data.

The screenshot shows the PIQ+ editor interface. The main content area displays a "Notice of Annual General Meeting" template. The text includes merge fields for strata plan number, building name, street name, suburb, state, and postcode. A table lists meeting details with merge fields for date, time, and venue address. The agenda section contains a merge field for motions. On the right, a "Merge fields" panel lists all available fields with a search bar and a scrollable list.

Notice of Annual General Meeting

For OWNERS CORPORATION PLAN OF SUBDIVISION: {{Strata plan number}} - {{Building name}},  
{{Building street number}} {{Building street name}}, {{Building suburb}} {{Building state}} {{Building postcode}}

The Annual General Meeting for the Owners Corporation will be held:

|              |              |                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Meeting date | Meeting time | To join Zoom Meeting, please visit <a href="http://www.zoom.us/join">www.zoom.us/join</a> . You will then be prompted to enter in the meeting ID and Password.<br>MEETING ID: 345345PASSWORD: 678543<br>To assist in recording attendance, once you enter the meeting please amend your visible username by double clicking on the type to include your "Lot Number" and "Name". |
|              |              | My Strata Co Office, {{Meeting venue name}}, {{Meeting venue address}}                                                                                                                                                                                                                                                                                                           |

Agenda

1. {{Motions for agenda}}

Merge fields list:

- Building ABN
- Building address 2
- Building name
- Building plan QLD
- Building postcode
- Building state
- Building street name
- Building street number
- Building suburb
- Building type
- Current financial year end date

Preview in PIQ+ for an individual meeting. When viewing merge fields in a **meeting**, it will display actual data relevant to that building in a live preview.

The screenshot shows the PIQ+ preview interface. The main content area displays the "Notice of Annual General Meeting" with actual data populated. The meeting date is 31/05/2023, the time is 06:00 PM (Sydney time), and the venue is My Strata Co Office, Level 2/125 Bourke Street. The agenda section lists "1. Accept minutes of the previous meeting".

Notice of Annual General Meeting

For OWNERS CORPORATION PLAN OF SUBDIVISION: 18421 - Jacksons Hill-edited2, 1014 Phillips Drive, REDHILL NSW 2001

The Annual General Meeting for the Owners Corporation will be held:

|            |                        |                                                                                                                                                                                                                                                                                                                                                                                  |
|------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 31/05/2023 | 06:00 PM (Sydney time) | To join Zoom Meeting, please visit <a href="http://www.zoom.us/join">www.zoom.us/join</a> . You will then be prompted to enter in the meeting ID and Password.<br>MEETING ID: 345345PASSWORD: 678543<br>To assist in recording attendance, once you enter the meeting please amend your visible username by double clicking on the type to include your "Lot Number" and "Name". |
|            |                        | My Strata Co Office, Level 2/125 Bourke Street                                                                                                                                                                                                                                                                                                                                   |

Agenda

1. Accept minutes of the previous meeting

PDF/Print output for an individual meeting.

The screenshot shows the PDF/Print output of the meeting document. The layout is clean and professional, with the meeting details and agenda clearly presented. The page number "1" is visible in the top left corner.

Notice of Annual General Meeting

For OWNERS CORPORATION PLAN OF SUBDIVISION: 18421 - Jacksons Hill-edited2, 1014 Phillips Drive, REDHILL NSW 2001

The Annual General Meeting for the Owners Corporation will be held:

|            |                        |                                                                                                                                                                                                                                                                                                                                                                                  |
|------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 31/05/2023 | 06:00 PM (Sydney time) | To join Zoom Meeting, please visit <a href="http://www.zoom.us/join">www.zoom.us/join</a> . You will then be prompted to enter in the meeting ID and Password.<br>MEETING ID: 345345PASSWORD: 678543<br>To assist in recording attendance, once you enter the meeting please amend your visible username by double clicking on the type to include your "Lot Number" and "Name". |
|            |                        | My Strata Co Office, Level 2/125 Bourke Street                                                                                                                                                                                                                                                                                                                                   |

Agenda

1. Accept minutes of the previous meeting

Ordinary resolution

That the minutes of the last meeting held on 01/06/2015 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.

## DYNAMIC TABLES AND BLOCKS – MOTIONS, INSURANCE

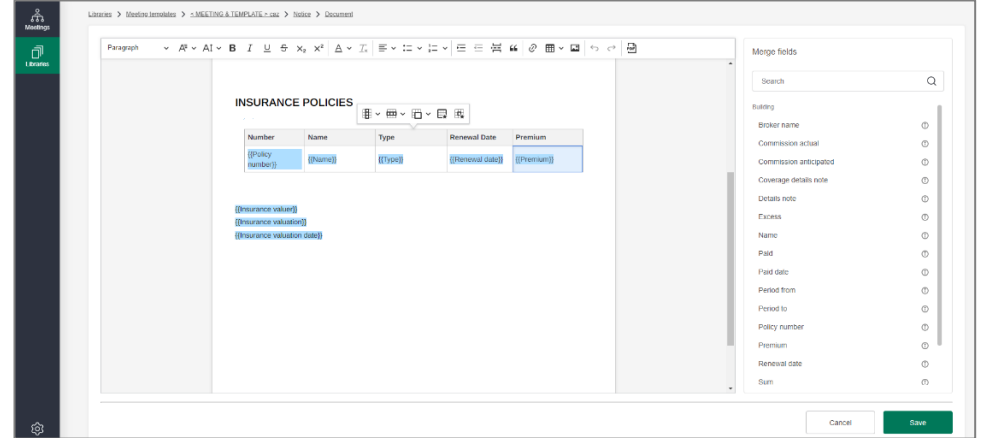
All merge fields in the merge field library are available for motions, email templates and meeting templates (notices and minutes) except for the below types. See below table for detailed explanation of exceptions.

- **‘Motions for agenda’** - only available on the *Meeting template>Notice Document editor*
- **‘Motions for minutes’** - only available on the *Meeting template>Minutes document editor*
- **Insurance related merge fields** (Broker name, Commission actual, Excess, Name, Paid, Paid date etc) - only available when you add an ‘Insurance Policies’ table to the editor for motions, notices or minutes. When you **click inside** the insurance policies table, you can then add insurance policy related fields from the merge field list for selection.

| Merge field                           | Information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>{{Motions for agenda}}</b>         | <ul style="list-style-type: none"> <li>• Only available for the meeting notice under <i>Meetings Template&gt;Notice tab</i></li> <li>• This merge field becomes a read-only block in the notice that contains: <ul style="list-style-type: none"> <li>○ Pre-set motions from the meeting template; and</li> <li>○ Adhoc motions added from within a meeting.</li> </ul> </li> <li>• Each motion block will display: <ul style="list-style-type: none"> <li>○ Motion title (setup in Motion&gt;Details)</li> <li>○ Resolution type (setup in Motion&gt;Details)</li> <li>○ Explanatory note (setup in Motion&gt;Details and will only be displayed if toggled on)</li> <li>○ Instructions (setup in Motion&gt;Details and will only be displayed if toggled on)</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>{{Motions for minutes}}</b>        | <ul style="list-style-type: none"> <li>• Only available for the meeting minutes under <i>Meetings Template&gt;Minutes tab</i></li> <li>• This merge field becomes a read-only block in the minutes that contains: <ul style="list-style-type: none"> <li>○ Pre-set motions from the meeting template; and</li> <li>○ Adhoc motions added from within a meeting.</li> </ul> </li> <li>• Each motion block will display: <ul style="list-style-type: none"> <li>○ Motion title (setup in Motion&gt;Details)</li> <li>○ Motion outcome text (setup in Motion&gt;Minutes)</li> <li>○ Vote tally (as entered in Meeting&gt;Results, must have a number to be visible)</li> <li>○ Mover and seconder (as entered in Meeting&gt; Results)</li> <li>○ Notes (as entered in Meeting&gt;Results and will only display if toggled on)</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                  |
| <b>Insurance related merge fields</b> | <p>There are four (4) insurance related merge fields available in the main merge field list:</p> <ul style="list-style-type: none"> <li>• {{Insurance valuation}}</li> <li>• {{Insurance valuation date}}</li> <li>• {{Insurance valuer}}</li> <li>• {{Insurance policies}}</li> </ul> <p><b>{{Insurance policies}} creates a dynamic table.</b></p> <ul style="list-style-type: none"> <li>• Creates a customisable table for motions, notices and minutes that displays insurance policy details.</li> <li>• An empty, dynamic table will appear when this merge field is used. When the table is in focus (user clicks within table) then the “Insurance policy” related merge fields can be placed in the Insurance policies table (‘children merge fields’).</li> <li>• The children merge fields are only visible when you’ve clicked on the Insurance policies dynamic table and include: <ul style="list-style-type: none"> <li>○ Broker name</li> <li>○ Commission actual</li> <li>○ Commission anticipated</li> <li>○ Coverage details note</li> <li>○ Details note</li> <li>○ Excess</li> <li>○ Name</li> <li>○ Paid</li> <li>○ Paid date</li> <li>○ Period from</li> </ul> </li> </ul> |

- Period to
- Policy number
- Premium
- Renewal date
- Sum
- Type
- Weekly

Example of insurance dynamic table set up in the meeting template:



Example of populated view in the notice/ minutes document:

