PropertyIQ™

Guide to updating templates DEFT changes 2022

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We've updated some settings and templates in PIQ in response to upcoming changes to DEFT payment options.

From early next year, cash payments will no longer be accepted via DEFT at Australia Post outlets.

Additionally, the $2.75 Australia Post charge will be permanently removed and no longer need to be paid on top of the levy/fee amount. To learn more about these changes, visit **deft.com.au/change**.

- **Settings > Australia Post charge** – Under Utilities>Settings>Applications Settings tab in your PIQ, the amount shown in the *Aus Post Charge* setting has been changed from $2.75 to $0.00.
  - This setting is used to display the charge on notices using the merge fields {{Aus_Post_Charge}} and {{APO_Total_Due}} in your existing templates.
  - This setting is also used to generate the barcode on the notice (barcode indicates the amount payable). When scanning the barcode at Australia Post, no charge ($0.00 as per setting) will be added to the amount payable.
    You do **not** need to take any action on this.

- **Templates** – All notice and invoice templates with a DEFT payment slip have received a range of changes, including new logos, barcode and text. The main changes include:
  - new barcode which removes cash payment type and the $2.75 charge when it's scanned by Australia Post
  - removal of text that refers to the $2.75 charge when paying at Australia Post
  - updated text in the Australia Post section with accepted payment methods eg removal of cash
  - general reformatting and consolidation of all fields into one table for easy editing and placement on the page.

! **What you need to do – ACTION BY 1 March 2022**

You don't need to do anything right now. However you should update your templates as soon as possible to ensure the newest DEFT payment slip is being used. Templates must be updated by no later than 1 March 2022.

What you need to do by 1 March 2022:

1. Review the list of updated templates **here**.

2. For the templates that you use, you'll need to manually add the new version templates to your PIQ under *File>Templates* and by clicking the *Add* button. The new version templates are available from the default list of templates. You can customise the content in the new templates to suit as per your old templates.

3. Once the new templates have been added and customised under File>Templates, select them as the new system default using the checkbox in the *Selected* column.

For more information:

- Refer ***Instructions - Update to New Version Templates*** and ***Tip – Copy Content Between Templates*** for help.
- Refer ***List of Updated Templates*** to view a complete list of the PIQ templates that have been updated.
- Refer ***Example – Previous vs New Template Comparison*** for screenshots of the differences between the previous and new version payment slip.

LIST OF UPDATED TEMPLATES

All notice and invoice templates <u>with a DEFT payment slip</u> have received a range of changes.

The following templates have been updated for all States and Territories (ACT, NSW, NT, SA, VIC, QLD, WA, TAS):

- **Due/Fee notices**
  - Due Notice / Fee Notice
  - Due Notice / Fee Notice (CA)
  - Due Notice / Fee Notice (Co)
- **Fee Notice Summary** [VIC only]
- **Special levy/fee notices**
  - Special Notice
  - Special Notice (CA)
  - Special Notice (Co)
- **Arrears notices**
  - Arrears Notice
  - Arrears Notice (CA)
  - Arrears Notice (Co)
- **Final notices**
  - Final Notice
  - Final Notice (CA)
  - Final Notice (Co)
- **Legal notices**
  - Legal Notice
  - Legal Notice (CA)
  - Legal Notice (Co)
- **Debtors invoice & statement**
  - Debtor Invoice
  - Debtor Statement
- **Deposit Slip**
- **Utility debtor invoices & statement** (used by utility debtors feature)
  - Utility Debtor Invoice – Electricity
  - Utility Debtor Invoice – Gas
  - Utility Debtor Invoice – Other utility
  - Utility Debtor Invoice – Water
  - Utility Debtor Statement
- **Utility invoices** (used by standard utility billing feature)
  - Electricity Notice
  - Gas Notice
  - Other Utility Notice
  - Water Notice

The main changes include:

- new barcode which removes cash payment type and the $2.75 charge when it's scanned by Australia Post
- removal of text that refers to the $2.75 charge when paying at Australia Post
- updated text in the Australia Post section with accepted payment methods eg removal of cash
- general reformatting and consolidation of all fields into one table for easy editing and placement on the page.

Previous version:

New version:

INSTRUCTIONS - UPDATE TO NEW VERSION TEMPLATES

Go to *File>Templates* to open your PIQ templates.

1. Remain on the *Standard Merge Templates* tab.
2. Click *New* at the bottom of the screen.
3. In the popup, give the new template a name eg Due Notice – New.
4. In the Type dropdown, select the template you want to create eg to replace your due notice, select the due notice type from the list for your applicable State/Territory.
5. Click *Create* to create the new template. It will open in a new browser tab.

6. Change the properties of the template if required eg Folio.
7. Customise the content of the template to suit your needs eg insert Logo, add text and reformat.
   ! IMPORTANT NOTE:
   - *Because it's a new system default template, you'll need to copy across any custom content from your old template to your new template.*
   - *Refer **Tip - Copy Content Between Templates** for help.*
8. Click *Save* to save your new template. This will now appear in your default list of templates.

9. Locate the new template in the list.
10. Tick the checkbox in the *Selected* column to enable the template as the new system default. PIQ will then start using that template moving forward.

Repeat this process *for all relevant templates that you're using in PIQ (refer* list of updated templates*) to ensure the new version templates, and the new DEFT payment slip, are applied.*

TIP - COPY CONTENT BETWEEN TEMPLATES

Creating and editing your templates can be difficult at times, so for our advanced users, here's a tip to copy content between templates using the source .html. This may be helpful when copying custom content from an old version template to a new version template (or vice versa).

For example:

- copy a logo or all the content in a text box from Template A to Template B; or,
- copy the new DEFT payment slip from the new version template into your old templates, to continue using your old templates with customised content but with the new DEFT payment slip.

Below is an example of how to copy the new DEFT payment slip from a new template into your existing template.

Go to the NEW template

On the File>Templates screen, locate and open the new template you've created (refer <u>'Instructions – Update to new version templates'</u>)

1. Scroll down to the bottom of the template and **click anywhere within the text box** that contains the DEFT payment slip.
2. Ensure your mouse cursor is still within the textbox and click the *Source* button in the top menu.

3. In the *Source* popup window, **highlight and copy ALL** the content in the box (To select all; on your keyboard press Ctrl+A. To copy; right mouse click on content and select copy, or on your keyboard press Ctrl+C).
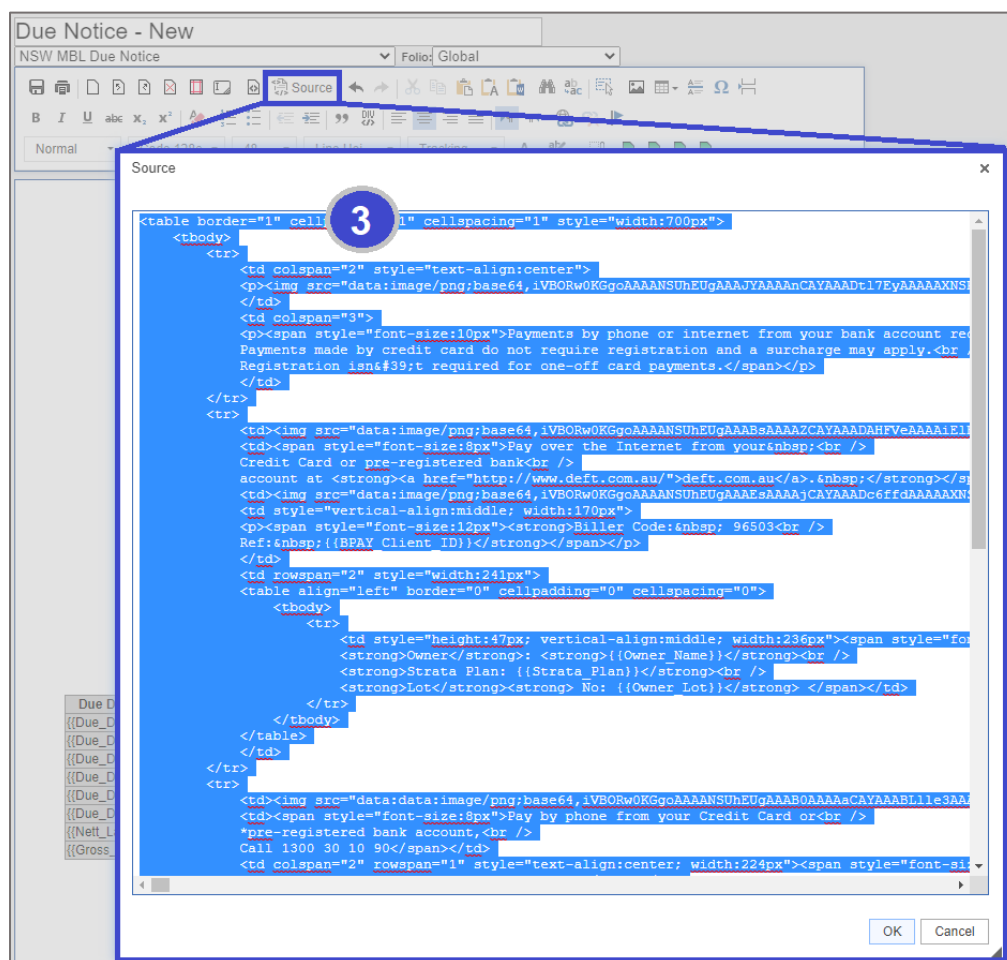
Go to the OLD/EXISTING template you want to update

4. Scroll down to the bottom of the template and **delete ALL** the individual text boxes that form the DEFT payment slip (within the blue box area below). You can delete each text box by clicking on the ✖ icon in the top right corner of each text box.

5. Create a new textbox in the template. You can do this by click the textbox icon in the top menu, as highlighted. The new text box will appear in the top left corner of the template. Click within the textbox.

6. Ensure your mouse cursor is still within the textbox and click the *Source* button in the top menu.
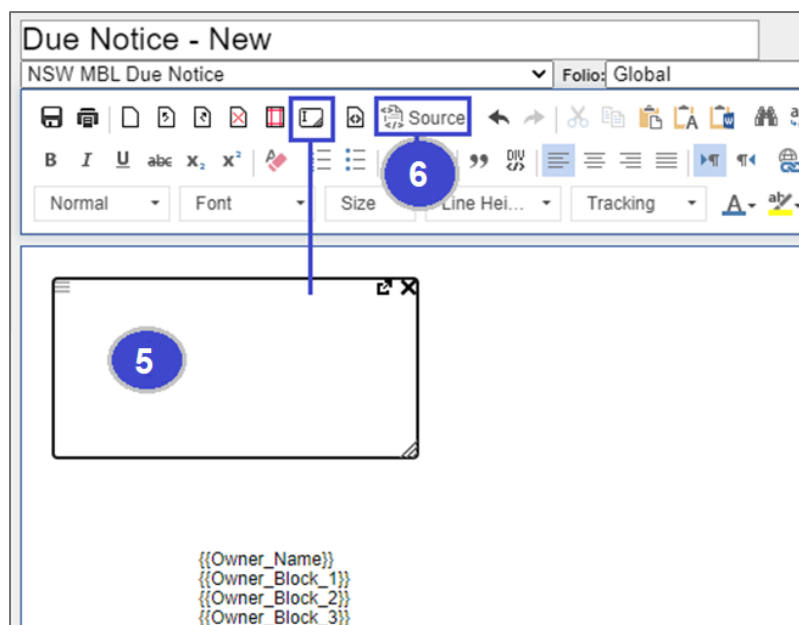
7. In the *Source* popup window, paste the content in the box (To paste; right mouse click on content and select paste, or on your keyboard press Ctrl+V).

8. Click *OK* to save.
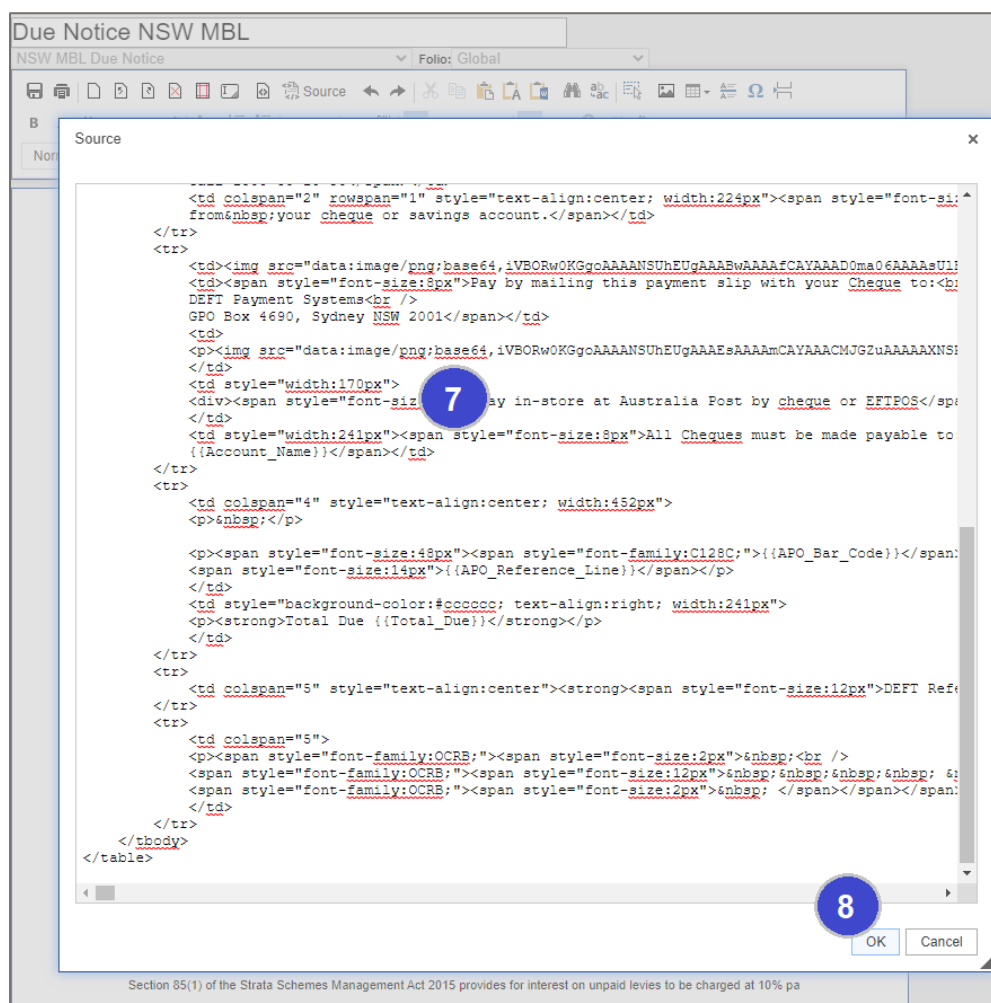
9. The new DEFT payment slip will now appear in the text box, or wherever your mouse cursor was located at the time you used the Source button.

❓ **HINT**: *If the content doesn't look right or some content is missing, it means you didn't copy ALL the source html from the other template (as per Step 3). You'll need to try again and repeat the process, making sure you highlight and copy everything from the source window.*

10. Move the DEFT payment slip to the bottom of the template by using the ☰ icon to drag the text box.
11. Click *Save* to save your changes.

You can repeat this process to copy the new DEFT payment slip into each of your existing templates (replace the old payment slip with the new).