



# 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](https://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.

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## LIST OF UPDATED TEMPLATES

All notice and invoice templates with a DEFT payment slip 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

## EXAMPLE - PREVIOUS VS NEW TEMPLATE COMPARISON








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:

		<small>*Payments by phone or Internet from your cheque or savings account require registration. Please complete a Customer Initiated Direct Debit registration form available at <a href="http://www.deft.com.au">www.deft.com.au</a> or call 1800 672 162. Payments by Credit Card do not require registration and a surcharge may apply.</small>	
	Pay over the Internet from your Credit Card or pre-registered bank account at <a href="http://www.deft.com.au">www.deft.com.au</a> .		Biller Code: 96503 Ref: {{BPAY_Client_ID}}
	Pay by phone from your Credit Card or *pre-registered bank account, Call 1300 30 10 90 or Int ++612 8232 7395	Contact your financial institution to make a BPAY payment from your cheque or savings account.	
	Pay by mailing this payment slip with your Cheque to: DEFT Payment Systems GPO Box 4690, Sydney NSW 2001		Pay in person at any Australia Post Office, using Cash, Cheque or EFTPOS. Payments made at Australia Post will incur a {{Aus_Post_Charge}} DEFT processing fee.
		All Cheques must be made payable to: {{Account_Name}}	
 {{APO_Reference_Line}}		<b>Total Due {{Total_Due}}</b> Total due if paying at Australia Post {{APO_Total_Due}}	
DEFT Reference Number: {{DEFT_REF_NO}}			
{{OCR_Part1}}		{{OCR_Part2}}	

### New version:

		<small>Payments by phone or internet from your bank account require registration. Register at <a href="http://deft.com.au">deft.com.au</a>. Payments made by credit card do not require registration and a surcharge may apply. Registration isn't required for one-off card payments.</small>	
	Pay over the Internet from your Credit Card or pre-registered bank account at <a href="http://deft.com.au">deft.com.au</a> .		Biller Code: 96503 Ref: {{BPAY_Client_ID}}
	Pay by phone from your Credit Card or *pre-registered bank account, Call 1300 30 10 90	Contact your financial institution to make a BPAY payment from your cheque or savings account.	
	Pay by mailing this payment slip with your Cheque to: DEFT Payment Systems GPO Box 4690, Sydney NSW 2001		Pay in-store at Australia Post by cheque or EFTPOS
		All Cheques must be made payable to: {{Account_Name}}	
 {{APO_Reference_Line}}		<b>Total Due {{Total_Due}}</b>	
DEFT Reference Number: {{DEFT_REF_NO}}			
{{OCR_Part1}}		{{OCR_Part2}}	

## 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.

The screenshot shows the 'Templates' interface in PropertyIQ Strata. The 'Standard Merge Templates' tab is active. A 'New Merge Template' dialog box is open, allowing the user to create a new template. The dialog box has fields for 'Name' (set to 'Due Notice - New') and 'Type' (set to 'NSW MBL Due Notice'). There are '+ Create' and 'X Cancel' buttons. The background table lists various templates with columns for Name, Type, State, Bank Type, Folio, and Selected. The 'Due Notice NSW MBL' template is highlighted in yellow. The 'New' button at the bottom right of the table is circled with a blue '2'.

Name	Type	State	Bank Type	Folio	Selected
Utility Debtor Invoice - Water	Utility Debtor Invoice - Water				<input checked="" type="checkbox"/>
Debtor Statement	Debtor Statement				<input checked="" type="checkbox"/>
MBL Deposit Slip	MBL Deposit Slip		Macquarie Bank		<input checked="" type="checkbox"/>
WSP Deposit Slip	WSP Deposit Slip		Westpac		<input checked="" type="checkbox"/>
Due Notice NSW MBL	NSW MBL Due Notice	NSW	Macquarie Bank		<input checked="" type="checkbox"/>
Due Notice NSW MBL (CA)	NSW MBL Due Notice (CA)	NSW	Macquarie Bank		<input checked="" type="checkbox"/>
Due Notice NSW MBL (Co)	NSW MBL Due Notice (Co)	NSW	Macquarie Bank		<input checked="" type="checkbox"/>
Due Notice NSW WSP	NSW WSP Due Notice	NSW	Westpac		<input checked="" type="checkbox"/>
Due Notice NSW WSP (CA)	NSW WSP Due Notice (CA)	NSW	Westpac		<input checked="" type="checkbox"/>
Due Notice NSW WSP (Co)	NSW WSP Due Notice (Co)	NSW	Westpac		<input checked="" type="checkbox"/>
NSW EGM Minutes Notice	NSW General Meeting Minutes Notice	NSW			<input checked="" type="checkbox"/>
NSW EGM Minutes Notice (CA)	NSW General Meeting Minutes Notice (CA)	NSW			<input checked="" type="checkbox"/>
NSW EGM Minutes Notice (Co)	NSW General Meeting Minutes Notice (Co)	NSW			<input checked="" type="checkbox"/>
Electricity Notice	Electricity Notice				<input checked="" type="checkbox"/>
DEFT changes - Updated - electricity-notice.html	Electricity Notice				<input type="checkbox"/>
DEFT changes - Old - electricity-notice.html	Electricity Notice				<input type="checkbox"/>
NSW Extraordinary General Meeting Notice	NSW General Meeting Minutes Notice	NSW			<input checked="" type="checkbox"/>
DEFT changes - Old - final-notice-nsw-mbl	NSW MBL Final Notice	NSW	Macquarie Bank		<input type="checkbox"/>
DEFT changes - Updated - final-notice-nsw-mbl	NSW MBL Final Notice	NSW	Macquarie Bank		<input type="checkbox"/>

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.



## 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 '[Instructions – Update to new version templates](#)')

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.

**Due Notice - New**

NSW MBL Due Notice

Folio: Global

Source

2

**LEVY NOTICE**  
Strata Schemes Management Act 2015

RE: Strata Plan {{Strata\_Plan}}, Lot {{Owner\_Lot}}, Unit {{Owner\_Unit}}  
{{Building\_Street}} {{Building\_Street\_Name}}, {{Building\_Suburb}}  
{{Building\_State}} {{Building\_PCode}}.

Due Date	Ref.	Details	Admin	Capital Works	Int/Disc	Paid	Due
{{Due_Date1}}	{{Levy_ID1}}	{{Details1}}	{{Admin_Due1}}	{{Sinking_Due1}}	{{Int_Disc_Amt1}}	{{Paid1}}	{{Total_Amt1}}
{{Due_Date2}}	{{Levy_ID2}}	{{Details2}}	{{Admin_Due2}}	{{Sinking_Due2}}	{{Int_Disc_Amt2}}	{{Paid2}}	{{Total_Amt2}}
{{Due_Date3}}	{{Levy_ID3}}	{{Details3}}	{{Admin_Due3}}	{{Sinking_Due3}}	{{Int_Disc_Amt3}}	{{Paid3}}	{{Total_Amt3}}
{{Due_Date4}}	{{Levy_ID4}}	{{Details4}}	{{Admin_Due4}}	{{Sinking_Due4}}	{{Int_Disc_Amt4}}	{{Paid4}}	{{Total_Amt4}}
{{Due_Date5}}	{{Levy_ID5}}	{{Details5}}	{{Admin_Due5}}	{{Sinking_Due5}}	{{Int_Disc_Amt5}}	{{Paid5}}	{{Total_Amt5}}
{{Due_Date6}}	{{Levy_ID6}}	{{Details6}}	{{Admin_Due6}}	{{Sinking_Due6}}	{{Int_Disc_Amt6}}	{{Paid6}}	{{Total_Amt6}}
{{Nett_Label}}						{{Total_Due_Label}}	
{{Gross_Label}}							

1

Section 85(1) of the Strata Schemes Management Act 2015 provides for interest on unpaid levies to be charged at 10% pa

**DEFT PAYMENT SYSTEMS**

Payments by phone or internet from your bank account require registration. Register at [deft.com.au](#).  
Payments made by credit card do not require registration and a surcharge may apply.  
Registration isn't required for one-off card payments.

**BPAY** Biller Code: 96503  
Ref: {{BPAY\_Client\_ID}}

Account: {{Account\_Name}}  
Owner: {{Owner\_Name}}  
Strata Plan: {{Strata\_Plan}}  
Lot No: {{Owner\_Lot}}

Contact your financial institution to make a BPay payment  
From your [deft.com.au](#) or mortgage account

Pay by phone from your Credit Card or  
pre-registered bank account.  
Call 1300 30 10 90

Pay by making this payment slip with your  
Cheque in  
DEFT Payment Systems  
GPO Box 490, Sydney NSW 2001

Post Billpay  
Pay in person at Australia Post by cheque  
EFT/PCS

All Cheques must be made payable to:  
{{Account\_Name}}

**Total Due {{Total\_Due}}**

Barcode: {{APO\_Reference\_Line}}

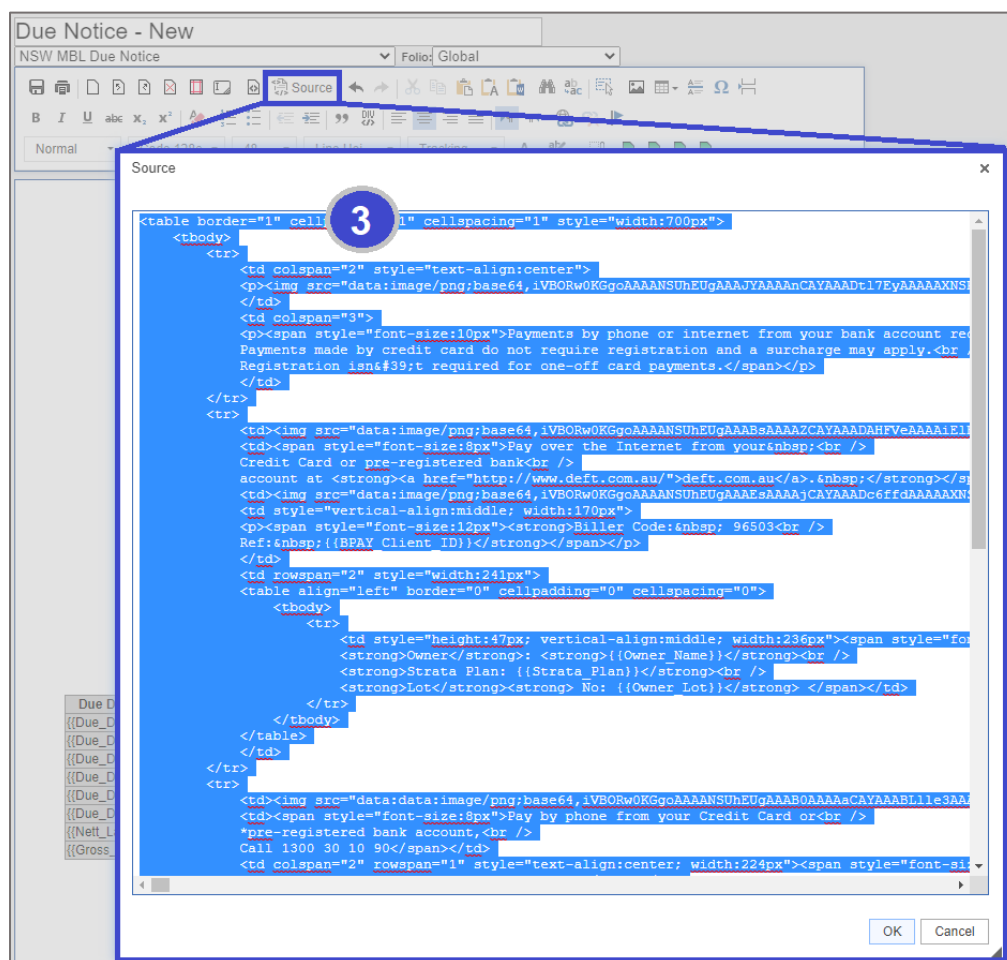
DEFT Reference Number: {{DEFT\_REF\_NO}}

DEFT Reference Number: {{DEFT\_REF\_NO}}

DEFT Reference Number: {{DEFT\_REF\_NO}}



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).



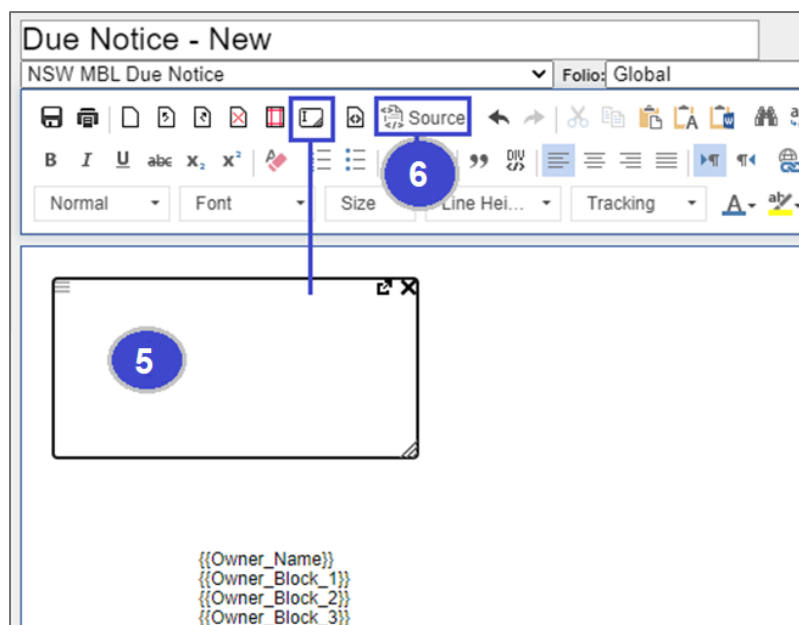
### Go to the OLD/EXISTING template you want to update

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 **X** icon in the top right corner of each text box.

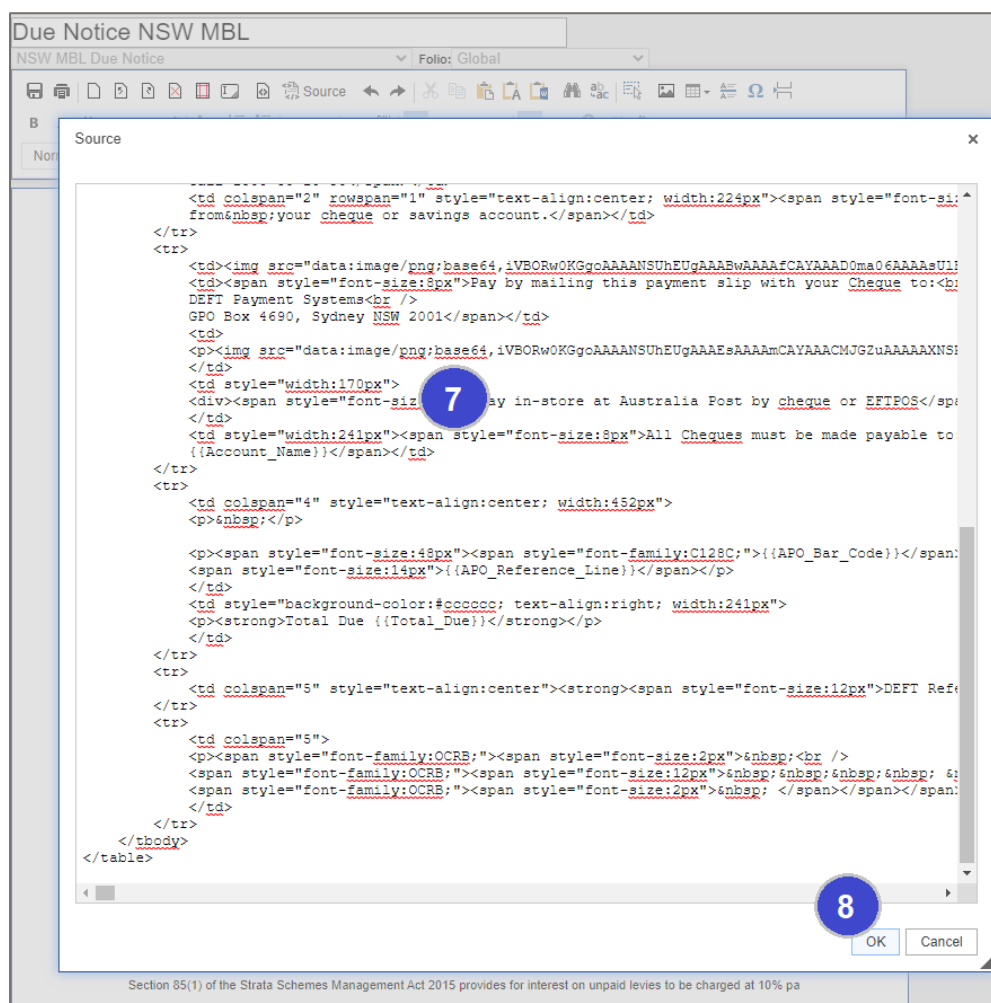
{{Nett_Label}} {{Gross_Label}}		{{Total_Due_Label}}	
{{Direct_Debit_Clause}} {{Levy_Message}}			
Section 85(1) of the Strata Schemes Management Act 2015 provides for interest on unpaid levies to be charged at 10% pa			
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>DEFT PAYMENT SYSTEMS</p> </div> <div style="width: 70%;"> <p>*Payments by phone or internet from your cheque or savings account require registration. Please complete a Customer Initiated Direct Debit registration form available at <a href="http://www.deft.com.au">www.deft.com.au</a> or call 1800 672 162. Payments by Credit Card do not require registration and a surcharge may apply.</p> </div> </div>			
<div style="display: flex;"> <div style="width: 50%;"> <p>Pay over the Internet from your Credit Card or pre-registered bank account at <a href="http://www.deft.com.au">www.deft.com.au</a></p> <p>Pay by phone from your Credit Card or pre-registered bank account. Call 1300 30 10 90 or tel +612 8232 7395</p> <p>Pay by mailing this payment slip with your Cheque to: DEFT Payment Systems GPO Box 4680, Sydney NSW 2001</p> </div> <div style="width: 50%;"> <p><b>Biller Code: 96503</b> <b>Ref: {{BPAY_Client_ID}}</b></p> <p>Contact your financial institution to make a BPAY payment from your cheque or savings account.</p> <p><b>POST billpay</b> Post your payment at any Australia Post office. Payment made at Australia Post will incur a {{Aus_Post_Label}} DEFT processing fee</p> </div> </div>		<div> <p>Account: {{Account_Name}}</p> <p>Owner: {{Owner_Name}}</p> <p>Strata Plan: {{Strata_Plan}}</p> <p>Lot No: {{Owner_Lot}}</p> </div>	
<p>DEFT Reference Number: {{DEFT_REF_NO}}</p>		<p><b>Total Due {{Total_Due}}</b></p> <p>Total due if paying at Australia Post {{APO_Total_Due}}</p>	
{{APO_Reference_Line}}		{{OCR_Part2}}	



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.



- 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.

Due Notice NSW MBL

NSW MBL Due Notice

Folio: Global

Source

Normal Font Size Line Hei... Tracking

**DEFT PAYMENT SYSTEMS**

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Payments made by credit card do not require registration and a surcharge may apply.  
Registration isn't required for one-off card payments.

Pay over the Internet from your Credit Card or [deft.com.au](http://deft.com.au) registered bank account at [deft.com.au](http://deft.com.au)

Pay by phone from your Credit Card or [deft.com.au](http://deft.com.au) registered bank account. Call 1300 30 10 90

Pay by mailing this payment slip with your Cheque to DEFT Payment Systems GPO Box 4890, Sydney NSW 2001

**BPAY** Biller Code: 96503 Ref: {{BPAY\_Client\_ID}}

Contact your financial institution to make a [deft.com.au](http://deft.com.au) payment from your [deft.com.au](http://deft.com.au) or savings account.

Pay in-store at Australia Post by [deft.com.au](http://deft.com.au) or [deft.com.au](http://deft.com.au)

All Cheques must be made payable to: {{Account\_Name}}

Account: {{Account\_Name}}  
Owner: {{Owner\_Name}}  
Strata Plan: {{Strata\_Plan}}  
Lot No: {{Owner\_Lot}}


DEFT Reference Number: {{DEFT\_REF\_NO}}

Date of Notice: {{Notice\_Date}}

Total Due: {{Total\_Due}}

DEFT Reference Number: {{DEFT\_REF\_NO}}

Date of Notice: {{Notice\_Date}}

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

Due Notice NSW MBL

NSW MBL Due Notice

Folio: Global

Source

Normal Font Size Line Hei... Tracking

**LEVY NOTICE**  
Strata Schemes Management Act 2015

RE: Strata Plan {{Strata\_Plan}}, Lot {{Owner\_Lot}}, Unit {{Owner\_Unit}}  
{{Building\_Street}} {{Building\_Street\_Name}}, {{Building\_Suburb}}  
{{Building\_State}} {{Building\_PCode}}

Due Date	Ref.	Details	Admin	Capital Works	Int/Disc	Paid	Due
{{Due_Date1}}	{{Levy_ID1}}	{{Details1}}	{{Admin_Due1}}	{{Sinking_Due1}}	{{Int_Disc_Amt1}}	{{Paid1}}	{{Total_Amt1}}
{{Due_Date2}}	{{Levy_ID2}}	{{Details2}}	{{Admin_Due2}}	{{Sinking_Due2}}	{{Int_Disc_Amt2}}	{{Paid2}}	{{Total_Amt2}}
{{Due_Date3}}	{{Levy_ID3}}	{{Details3}}	{{Admin_Due3}}	{{Sinking_Due3}}	{{Int_Disc_Amt3}}	{{Paid3}}	{{Total_Amt3}}
{{Due_Date4}}	{{Levy_ID4}}	{{Details4}}	{{Admin_Due4}}	{{Sinking_Due4}}	{{Int_Disc_Amt4}}	{{Paid4}}	{{Total_Amt4}}
{{Due_Date5}}	{{Levy_ID5}}	{{Details5}}	{{Admin_Due5}}	{{Sinking_Due5}}	{{Int_Disc_Amt5}}	{{Paid5}}	{{Total_Amt5}}
{{Due_Date6}}	{{Levy_ID6}}	{{Details6}}	{{Admin_Due6}}	{{Sinking_Due6}}	{{Int_Disc_Amt6}}	{{Paid6}}	{{Total_Amt6}}
Nett Label							{{Total_Due_Label}}
Gross Label							

Section 85(1) of the Strata Schemes Management Act 2015 provides for interest on unpaid levies to be charged at 10% pa

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Pay over the Internet from your Credit Card or [deft.com.au](http://deft.com.au) registered bank account at [deft.com.au](http://deft.com.au)

Pay by phone from your Credit Card or [deft.com.au](http://deft.com.au) registered bank account. Call 1300 30 10 90

Pay by mailing this payment slip with your Cheque to DEFT Payment Systems GPO Box 4890, Sydney NSW 2001

**BPAY** Biller Code: 96503 Ref: {{BPAY\_Client\_ID}}

Contact your financial institution to make a [deft.com.au](http://deft.com.au) payment from your [deft.com.au](http://deft.com.au) or savings account.

Pay in-store at Australia Post by [deft.com.au](http://deft.com.au) or [deft.com.au](http://deft.com.au)

All Cheques must be made payable to: {{Account\_Name}}

Account: {{Account\_Name}}  
Owner: {{Owner\_Name}}  
Strata Plan: {{Strata\_Plan}}  
Lot No: {{Owner\_Lot}}

DEFT Reference Number: {{DEFT\_REF\_NO}}

Date of Notice: {{Notice\_Date}}

Total Due: {{Total\_Due}}

DEFT Reference Number: {{DEFT\_REF\_NO}}

Date of Notice: {{Notice\_Date}}

**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).