

# PropertyIQ<sup>TM</sup>

## PIQ+ Merge Fields Guide



# Overview



## Description

This is a detailed guide on **PIQ+ Merge Fields**.

- Merge fields play an important role in the creation of Motions, Email templates and Meeting templates (notice and minutes documents).
- Merge fields automatically populate data into documents, saving you time and ensuring accuracy of information.



## What you'll learn

This guide will assist you to navigate the following:

- [Overview of merge fields](#)
- [Example documents](#)
- [Special merge fields, table and blocks](#)



## Who should read this

- Users responsible for creating and maintaining Motions, Email Templates and Meeting Templates
- Administrators



## Read time

8 minutes

## 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
  - General
  - Financial
  - Meeting
- **Search:** search for merge fields using keywords.
- **Drag and drop:** you can drag and drop each merge field to its desired position in your content.

## 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 they're added to a field or document. Merge fields can be presented as simple inline fields, dynamic tables or blocks.

- See [Special merge fields, tables and blocks](#) for more information.
- See [Example documents](#) for what merge fields might look like in your documents.

## Important callouts on system behaviour

- Merge fields are only available within templates. You cannot add or change merge fields in a notice or minutes document at the meeting level, as the merge field list is not available.
- You cannot modify the content or text within a merge field. However, you can apply styling and formatting to the field e.g. font size, bold, underline.
- There is special behaviour for some merge fields. See below [Special merge fields, tables and blocks](#) for more information.

## EXAMPLE DOCUMENTS

Below is an example when viewing merge fields within 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 a document editor interface with a toolbar at the top. The main content area displays a "Notice of Annual General Meeting" template. The text includes merge fields for building information and meeting details. A table contains merge fields for the meeting date, time, and venue. An agenda section follows. On the right, a "Merge fields" panel lists available fields for selection.

**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. MEETING ID: 345345PASSWORD: 678543 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".
		{{Meeting venue name}}, {{Meeting venue address}}

Agenda  
 {{Motions for agenda}}

**Merge fields panel:**

- Building
- 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

Below is an example when previewing the template being used in an individual meeting. When viewing merge fields in a **meeting**, it will populate and display actual data relevant to that building and meeting in a live preview.

The screenshot shows the same document editor interface, but now displaying a live preview of the meeting template. The merge fields have been replaced with actual data for a specific building and 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. MEETING ID: 345345PASSWORD: 678543 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

Below is an example of a PDF/Print output for an individual meeting.

The screenshot shows a PDF/Print output of the meeting document. The layout is clean and professional, with the meeting details and agenda clearly presented.

**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. MEETING ID: 345345PASSWORD: 678543 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

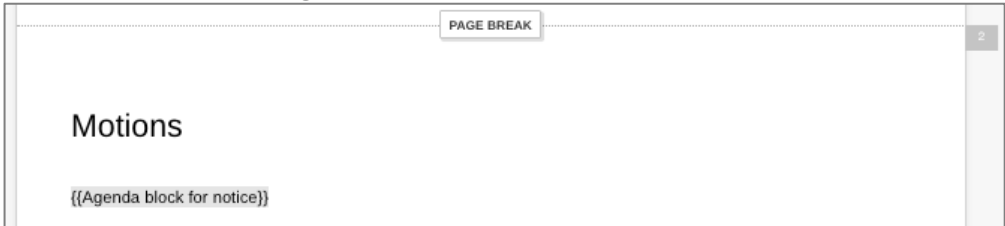
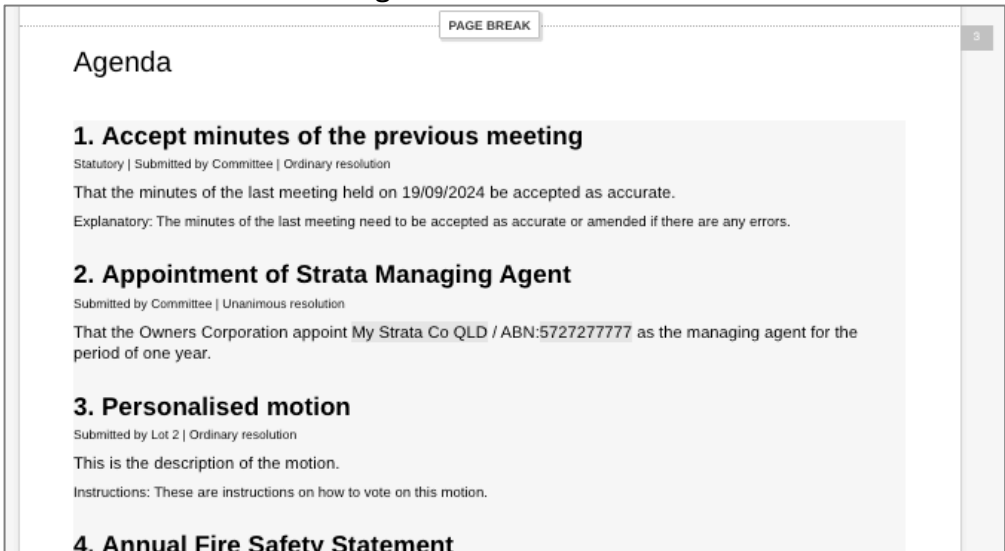
Agenda  
 1. Accept minutes of the previous meeting

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.

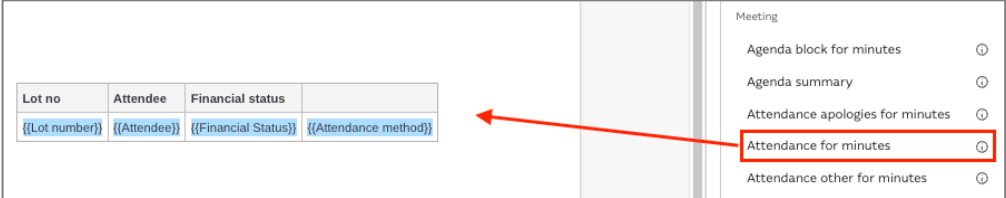

## SPECIAL MERGE FIELDS, TABLES AND BLOCKS

Most merge fields in the PIQ+ merge field library are available across all motions, email templates and meeting templates (notices and minutes). However, there are several merge fields with **special behaviour** or are **only available in certain templates** and documents because of the merge field's purpose. These are highlighted in the detailed table below.

Merge field	Information
<b>{{Meeting time}}</b>	<ul style="list-style-type: none"> <li>This merge field populates the time of the meeting based on the <b>location of the building</b> e.g. "10.00am (Brisbane time)" or "9.00am (Sydney time)"</li> <li>For example, if the building's state is QLD and there's a meeting at 10.00am, even if the notice or minutes is generated by a user located in WA or NSW, the merge field will appear as "10.00am (Brisbane time)". This is to avoid confusion for interstate and international meeting recipients that are in different time zones.</li> </ul>
<b>{{Agenda block for notice}}</b>	<ul style="list-style-type: none"> <li><b>Only available for the meeting notice template</b> under <i>Meetings Template &gt; Notice &gt; Document</i>.</li> <li>This merge field becomes a read-only block in the notice that contains: <ul style="list-style-type: none"> <li>Default motions/agenda items from the meeting template; and</li> <li>Adhoc motions/agenda items added in the meeting.</li> </ul> </li> <li>The block will display the following details for each motion/agenda item: <ul style="list-style-type: none"> <li>Title</li> <li>'Statutory' (if applicable - QLD)</li> <li>Proposer</li> <li>Resolution type</li> <li>Explanatory note (displayed if toggled on)</li> <li>Instructions (displayed if toggled on)</li> </ul> </li> </ul> <p><b>Example 1:</b> Default {{Agenda block for notice}} table in a notice template</p>  <p><b>Example 2:</b> Default {{Agenda block for notice}} table with populated data in a notice document in a meeting</p> 



<p><b>{{Agenda block for minutes}}</b></p>	<ul style="list-style-type: none"> <li>• <b>Only available for the meeting minutes template</b> under <i>Meetings Template&gt; Minutes&gt; Document</i>.</li> <li>• This merge field becomes a read-only block in the minutes that contains: <ul style="list-style-type: none"> <li>○ Default motions/agenda items from the meeting template; and</li> <li>○ Adhoc motions/agenda items added in the meeting.</li> </ul> </li> <li>• The block will display the following details for each motion/agenda item: <ul style="list-style-type: none"> <li>○ Title</li> <li>○ 'Statutory' (if applicable – QLD)</li> <li>○ Proposer</li> <li>○ Resolution type</li> <li>○ Motion outcome text (setup in Motion&gt;Minutes)</li> <li>○ Mover and seconder (as entered in Meeting&gt; Results, displayed if toggled on)</li> <li>○ Motion result (e.g carried, defeated)</li> <li>○ Vote tally (as entered in Meeting&gt;Results, displayed only if tally recorded)</li> <li>○ Notes (as entered in Meeting&gt;Results, displayed if toggled on)</li> </ul> </li> </ul> <p><b>Example 1:</b> Default {{Agenda block for minutes}} table in a minutes template</p> <div data-bbox="453 763 1458 887"> <p>Motions</p> <p>{{Agenda block for minutes}}</p> </div> <p><b>Example 2:</b> Default {{Agenda block for minutes}} table with populated data in a minutes document in a meeting</p> <div data-bbox="453 994 1458 1588"> <p>Motions</p> <p><b>1. Accept minutes of the previous meeting</b>  Statutory   Submitted by Committee   Ordinary resolution  That the minutes of the last meeting held on 19/09/2024 be accepted as accurate.  <b>CARRIED</b> Yes 2 No 1 Abstain 1 Invalid 1  Note: This is a note to the motion.</p> <p><b>2. Appointment of Strata Managing Agent</b>  Submitted by Committee   Special resolution  That the Owners Corporation appoint My Strata Co QLD / ABN:5727277777 as the managing agent for the period of one year.  <b>Mover:</b> Susan Smith - Lot 2 / Unit 2a <b>Seconder:</b> Grace Jones - Lot 7 / Unit 7  <b>CARRIED</b> Yes 3 No 0 Abstain 2 Invalid 1</p> <p><b>3. Personalised motion</b>  Submitted by Lot 2   Ordinary resolution  This is the description of the motion.  <b>DEFEATED</b> Yes 1 No 4 Abstain 0 Invalid 1</p> <p><b>4. Annual Fire Safety Statement</b></p> </div>
<p><b>{{Attendance for minutes}}</b></p>	<ul style="list-style-type: none"> <li>• <b>Only available in the meeting minutes template</b> under <i>Meetings Template&gt; Minutes&gt; Document</i>.</li> <li>• This merge field has special behaviour and when inserted into your minutes document, <b>creates a default table</b> populated with details of <b>Lot attendees</b>.</li> <li>• When you click within the table, the merge field list will then show you the 'children merge fields' related to lot attendees. <ul style="list-style-type: none"> <li>○ You can customise the content within the table as required by adding/removing merge fields, adding/removing columns, changing column headings, applying styling etc.</li> </ul> </li> <li>• The children merge fields for attendance are: <ul style="list-style-type: none"> <li>○ Attendance method (e.g pre-vote, in-person, remote)</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Attendee</li> <li>○ Committee member status</li> <li>○ Financial status</li> <li>○ Lot number</li> <li>○ Owner name</li> <li>○ Schedule names</li> <li>○ Unit number</li> <li>○ UOE</li> </ul> <p><b>Example:</b> Default {{Attendance for minutes}} table in a meeting minutes template</p> 
<b>{{Attendance other for minutes}}</b>	<ul style="list-style-type: none"> <li>• <b>Only available in the meeting minutes template</b> under <i>Meetings Template&gt; Minutes&gt; Document</i>.</li> <li>• This merge field has special behaviour and when inserted into your minutes document, <b>creates a default table</b> populated with details of <b>Other attendees</b>.</li> <li>• When you click within the table, the merge field list will then show you the 'children merge fields' related to other attendees. <ul style="list-style-type: none"> <li>○ You can customise the content within the table as required by adding/removing merge fields, adding/removing columns, changing column headings, applying styling etc.</li> </ul> </li> <li>• The children merge fields for other attendance are: <ul style="list-style-type: none"> <li>○ Description</li> <li>○ Name</li> </ul> </li> </ul> <p><b>Example:</b> Default {{Attendance other for minutes}} table in a meeting minutes template</p> 
<b>{{Attendance apologies for minutes}}</b>	<ul style="list-style-type: none"> <li>• <b>Only available in the meeting minutes template</b> under <i>Meetings Template&gt; Minutes&gt; Document</i>.</li> <li>• This merge field has special behaviour and when inserted into your minutes document, <b>creates a default table</b> populated with details of <b>Apologies</b>.</li> <li>• When you click within the table, the merge field list will then show you the 'children merge fields' related to apologies. <ul style="list-style-type: none"> <li>○ You can customise the content within the table as required by adding/removing merge fields, adding/removing columns, changing column headings, applying styling etc.</li> </ul> </li> <li>• The children merge fields for apologies are: <ul style="list-style-type: none"> <li>○ Lot number</li> <li>○ Name</li> <li>○ Schedule names</li> <li>○ Unit number</li> </ul> </li> </ul>

**Example:** Default {{Attendance apologies for minutes}} table in a meeting minutes template

<table><tr><th>Lot number</th><th>Name</th></tr><tr><td>{{Lot number}}</td><td>{{Name}}</td></tr></table>		Lot number	Name	{{Lot number}}	{{Name}}	<div>Meeting</div> <div>Agenda block for minutes ⓘ</div> <div>Agenda summary ⓘ</div> <div>Attendance apologies for minutes ⓘ</div> <div>Attendance for minutes ⓘ</div>
Lot number	Name					
{{Lot number}}	{{Name}}					

**{{Agenda summary}}**

- The {{Agenda summary}} merge field has special behaviour and when inserted into your notice or minutes template, **creates a default table** populated with details of **motion and agenda items** in the meeting (like a table of contents).
- When you click within the agenda summary table, the merge field list will then show you the 'children merge fields' related to it.
  - You can customise the content within the table as required by adding/removing merge fields, adding/removing columns, changing column headings, applying styling etc.
- The children merge fields for agenda summary are:
  - Number
  - Submitted by
  - Title
  - Type
  - Voting

**TIPS**

- You may like to place this on the first page of your notice or minutes to act as the agenda.
- You can also add voting options (yes, no, abstain) for each motion. You can use this to create a **'voting sheet'** at the back of your notice with a section for lot details and signature etc, which can then be completed and returned by voters before the meeting. This is specifically helpful to **QLD** clients, where a voting paper must be distributed with the meeting notice. See example below.

**Example 1:** Default {{Agenda summary}} table in a meeting notice/minutes template

No.	Title	Type	Submitted by
{{Number}}	{{Title}}	{{Type}}	{{Submitted by}}

Owner name ⓘ

Recipient block ⓘ

Recipient name ⓘ

Unit number ⓘ

Meeting

Agenda block for minutes ⓘ

Agenda summary ⓘ

Attendance apologies for minutes ⓘ

**Example 2:** Default {{Agenda summary}} table with populated data in a meeting notice/minutes document of a meeting

Agenda			
No.	Title	Type	Submitted by
1	Accept minutes of the previous meeting	Statutory, Ordinary	Committee
2	Financial statements	Statutory, Ordinary	Committee
3	Auditor	Statutory, Ordinary	Committee
4	Insurance Policy	Ordinary	Committee
5	Annual Fire Safety Statement	Ordinary	Committee
6	Painting		
6.1	Painting - Quote A	Special	Committee
6.2	Painting - Quote B	Special	Committee
7	Discussion item - general business		



**Example 3:** Default {{Agenda summary}} table with populated data in a meeting notice/minutes document of a meeting, WITH voting options to create a **voting sheet**.

For OWNERS CORPORATION 40023  
Gazebo Terraces, 12 Little Street ALBION

### Voting Sheet

Agenda items and motions discussed at **AGM on 24th April 2025**.

Please vote Yes, No or Abstain against each motion by ticking the checkbox in the voting column.

No.	Title	Type	Submitted by	Voting
1	Accept minutes of the previous meeting	Statutory, Ordinary	Committee	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Abstain
2	Financial statements	Statutory, Ordinary	Committee	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Abstain
3	Auditor	Statutory, Ordinary	Committee	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Abstain
4	Insurance Policy	Ordinary	Committee	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Abstain
5	Annual Fire Safety Statement	Ordinary	Committee	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Abstain
6	Painting			
6.1	Painting - Quote A	Special	Committee	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Abstain
6.2	Painting - Quote B	Special	Committee	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Abstain
7	Discussion item - general business			

Please complete and sign the below, and return to ....

Owner name	{{Owner name}}
Lot number	{{Lot number}}
Unit number	{{Unit number}}
Signature:	
Date:	

## {{Insurance policies}}

The {{Insurance policies}} merge field has special behaviour and when inserted into your motion or document, **creates a default table** populated with **insurance details**.

- This insurance table can be used in your motions, notices and minutes that displays insurance policy details. The table will automatically expand and add more rows for multiple policies.
- When you click within the insurance table, the merge field list will then show you the 'children merge fields' related to insurance.
  - You can customise the content within the table as required by adding/removing merge fields, adding/removing columns, changing column headings, applying styling etc.
- The children merge fields for insurance are:
  - Broker name
  - Commission actual
  - Commission anticipated
  - Coverage details note
  - Details note
  - Excess
  - Name
  - Paid
  - Paid date
  - Period from
  - Period to
  - Policy number
  - Premium
  - Renewal date
  - Sum
  - Type
  - Weekly

### **TIP**

#### **Need to display details of insurance policies AND insurance commissions?**

- You can insert one insurance table in a motion to display insurance policy details for the building. You can then insert a second table in another motion or section to display insurance commission details. You can do this by customising the content in each table using the children merge fields.

#### **Example 1:** Default {{Insurance policies}} table in a meeting template

The screenshot shows a meeting template editor. On the left, a table is displayed with the following structure:

Policy No	Insurer	Broker	Expiry	Premium
{{Policy number}}	{{Name}}	{{Broker name}}	{{Period to}}	{{Premium}}
		Type	Insured	Excess
		{{Type}}	{{Sum}}	{{Excess}}

On the right, a 'Merge fields' panel is visible, showing a search bar and a list of available merge fields. A red arrow points from the 'Insurance policies' field in the list to the table. The list includes:

- Discount rate
- Instalments
- Insurance policies
- Insurance valuation
- Insurance valuation date

#### **Example 2:** Default {{Insurance policies}} table with populated data in a meeting notice/minutes document of a meeting

Policy No	Insurer	Broker	Expiry	Premium
Policy 1	Insurance 1	Broker 1	31/12/2026	\$5,000.00
		Type	Insured	Excess
		Building/Common Property	\$2,000,000.00	\$500.00
		Public Liability	\$10,000,000.00	\$500.00
Policy 2	Insurance 2	Broker 2	04/03/2026	\$1,200.00
		Type	Insured	Excess
		Office Bearers	\$1,000,000.00	\$500.00