PropertyIQ™

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PIQ+ Meetings

Meetings – Agenda

Quick Reference Guide

Version 2. Mar 2025

Overview

Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Meetings – Agenda**.
- A new meeting will include default agenda items and motions that are pre-populated from the meeting template selected when creating the meeting.
- From the **Agenda tab**, you can:
  1. View and edit the items pre-populated from the template
  2. Add additional agenda items from the library

     NOTE: To create an item in the library, refer to Quick Reference Guide "Libraries – Motions".
  3. Create new ad hoc items that only apply to that meeting
  4. Group agenda items
- All agenda items for a meeting will be grouped into a 'Agenda block' merge field that is used in meeting notices and minutes.

What you'll learn

This guide will assist you to navigate the following:

- How to **add** agenda items to a meeting from the library
- How to **create** ad hoc agenda items for a meeting
- How to **group** agenda items for a meeting (including 'Group of same-issue motions' for QLD buildings)

Who should read this

- Users responsible for creating and editing meetings
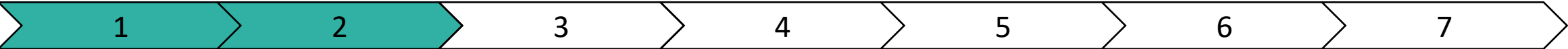- Strata Managers
- Administrators

Read time

8 minutes

How to add items to a meeting from the library

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There are 7 steps to adding an item to a meeting from the library. Below are steps 1-2.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

1 Select **Meetings** from the left-hand navigation menu.

2 Select a **meeting** from the list to view details of the meeting and agenda items.

How to add items to a meeting from the library (continued)

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There are 7 steps to adding an item to a meeting from the library. Below are steps 3-4.

1 > 2 > **3** > **4** > 5 > 6 > 7

3 Select **Agenda** tab.

4 Select **+ Add Items**.

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Meetings

< Back to meetings

18421 - AGM 27/02/2025 Pending notice

Jacksons Hill - 1014 Phillip Drive REDHILL, NSW 2001

Libraries

Details **Agenda** 3 Attendance Results Minutes

Export worksheets

4

+ Create group   + Add items

1 ∨	Accept minutes of the previous meeting	Ordinary resolution	⋮
2 ∨	Financial statements	Ordinary resolution	⋮
3 ∨	Appointment of Strata Managing Agent Submitted by Committee	Ordinary resolution	⋮

Settings

How to add items to a meeting from the library (continued)

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There are 7 steps to adding an item to a meeting from the library. Below are steps 5-7.

1 > 2 > 3 > 4 > 5 > 6 > 7

5 Select **Library**.

6 Select checkbox to add the item to the meeting.

7 Select **Add to meeting**.
It will then show in the list on the Agenda tab.

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Meetings > 18421 - AGM 27/02/2025 > Agenda

Export worksheets

Add items to 18421 - AGM 27/02/2025 Pending notice

| Library | Create new |

	Title ▲	Motion type	Resolution type	Last updated	
☑	1st Motion		Ordinary resolution	17/11/2023 by Jaz Jan 20 A	↗
☐	2nd Motion		Ordinary resolution	13/03/2025 by Nicki Scrive...	↗
☐	3rd Motion		Ordinary resolution	13/03/2025 by Nicki Scrive...	↗
☐	Accept minutes of the previous meeting Accept minutes (v2023)		Ordinary resolution	15/10/2024 by Nicki Scrive...	↗
☐	agm global 1234 test agm global		Ordinary resolution	05/04/2023 by Michael	↗
☐	Appointment of Strata Managing Agent	Committee	Ordinary resolution	15/10/2024 by Nicki Scrive...	↗

1 selected

Cancel | Add to meeting

Meetings | Libraries | Settings
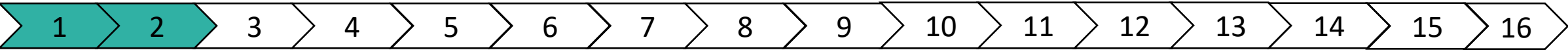
How to create ad hoc items for a meeting

There are 16 steps to creating an ad hoc item for a meeting. Below are steps 1-2.

1 〉 **2** 〉 3 〉 4 〉 5 〉 6 〉 7 〉 8 〉 9 〉 10 〉 11 〉 12 〉 13 〉 14 〉 15 〉 16 〉

Select and open the meeting from the **Meetings** screen.

1 Select **Agenda** tab.

2 Select **+ Add Items**.

How to create ad hoc items for a meeting (continued)

PropertyIQ

There are 16 steps to creating an ad hoc item for a meeting. Below are steps 3-10.

1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9 > 10 > 11 > 12 > 13 > 14 > 15 > 16

3 Select **Create New**.
This item will only apply to this meeting.

4 This is the **Details** section.

5 Select what **Type** of item it is.
Options are Motion and Agenda item.

6 Enter **Title** for the item.

7 *[Only applicable for Motion type]*
Select the **Submitted by**.
Options are Owner and Committee.

8 *[Only applicable for Motion type]*
Select the **Resolution type** that's applicable.
Note: This displays a list of available types across all States.

9 *[Only applicable for Motion type and non-QLD buildings]*
Select if this is a **Motion with alternative** options to vote on.

10 Scroll down to **Notice text** section.

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Meetings > 18421 - AGM 27/02/2025 > Agenda

Export worksheets

Add items to 18421 - AGM 27/02/2025 [Pending notice]

Library | **Create new** — 3

Details — 4

Type*
(•) Motion   ( ) Agenda item ⓘ — 5

Title (appears on notice and minutes)* — 6

Submitted by
Select — 7

Resolution type*
Ordinary resolution — 8

Motion with alternatives
[ ] Add options to vote on — 9

Notice text — 10

How to create ad hoc items for a meeting (continued)

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There are 16 steps to creating an ad hoc item for a meeting. Below are steps 11-13.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | **11** | **12** | **13** | 14 | 15 | 16 |

This is the **Notice** section.

11 Enter **Description.**
This is the text that will appear in meeting notice document.

12 *[Only applicable for Motion type]*
Select toggle to add **Explanatory note** and/or **Instructions**.

13 *[Only applicable for Motion type]*
Scroll down to **Minutes text** section.

How to create ad hoc items for a meeting (continued)

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There are 16 steps to creating an ad hoc item for a meeting. Below are steps 14-16.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | **14** | **15** | **16** |

This is the **Minutes** section.

14   *[Only applicable for Motion type]*
Enter Motion outcome text that will appear in the minutes document.

15   *[Only applicable for Motion type]*
You must add a description for each possible motion outcome.

Note: Motion outcomes are determined by the Motion Results settings. To configure, go to Settings menu in PIQ+ > Motion results section.

16   Select **Add to meeting.**
The motion or agenda item will then show on the Agenda tab.

How to group items for a meeting

There are 15 steps to grouping agenda items for a meeting. Below are steps 1-3.
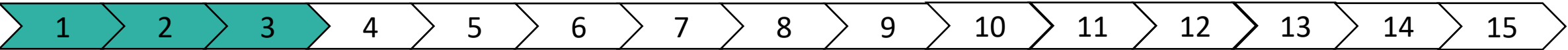
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |

Select and open the meeting from the **Meetings** screen.

1 Select **Agenda** tab**.**

2 Make sure the items you want to group are already added to your agenda and visible in the list.

Note: Refer to slide 3 'Add items from library' or slide 6 'Create adhoc items' for instructions.

3 Select **+ Create group**.

How to group items for a meeting (continued)

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There are 15 steps to grouping agenda items for a meeting. Below are steps 4-7.

| 1 | 2 | 3 | **4** | **5** | **6** | **7** | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |

4 *[Only applicable for QLD buildings]* Select the checkbox if it's a **Group of same-issue motions.**

Note: This affects voting and outcomes on the group of items on the Meeting>Results page.

5 Enter **Group Title**.

6 Select toggle to add a **Group Description** and/or a **Group explanatory note**.

7 Scroll down to **Items** section.

How to group items for a meeting (continued)

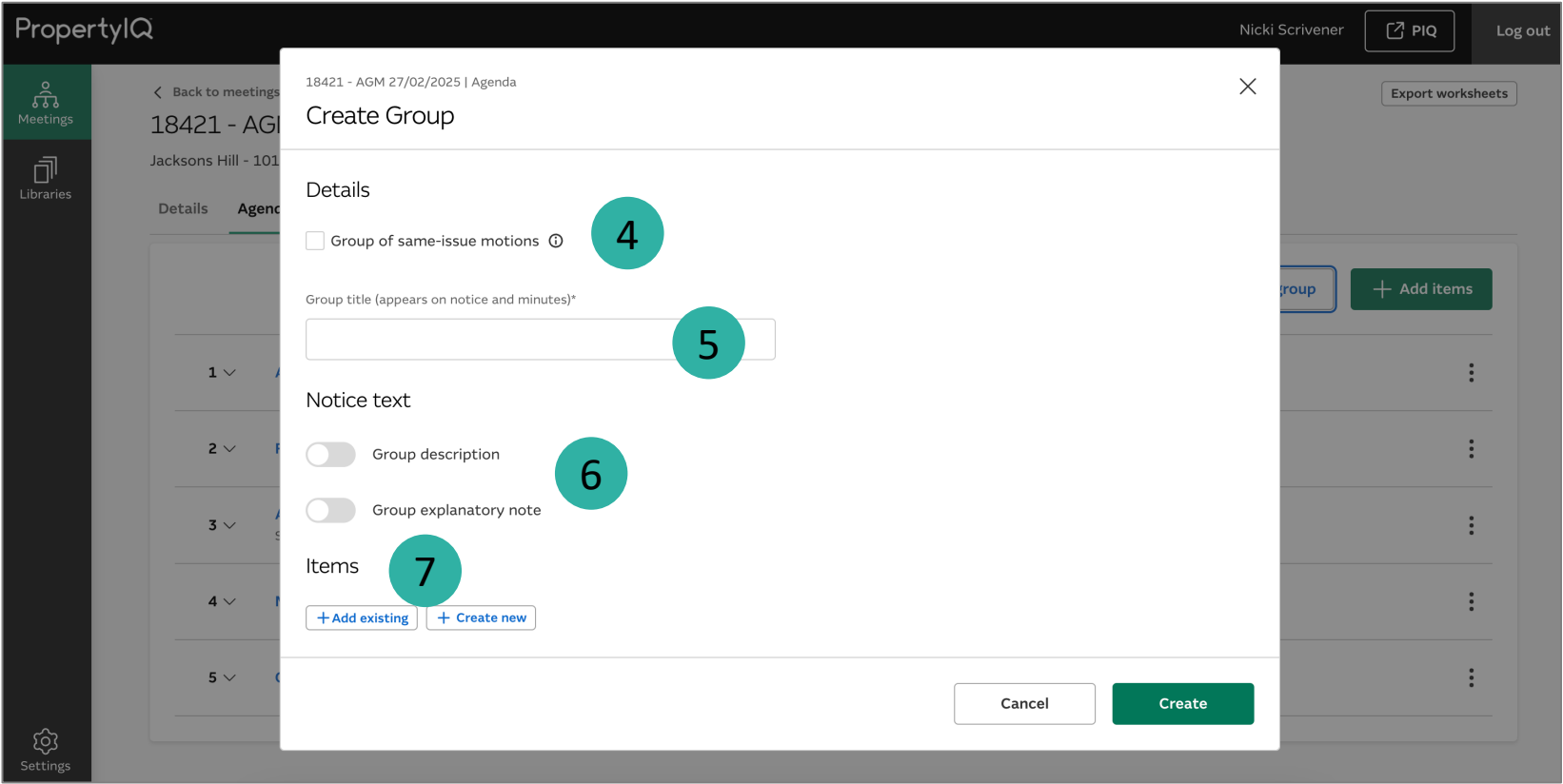There are 15 steps to to grouping agenda items for a meeting. Below are steps 8-15.

1 > 2 > 3 > 4 > 5 > 6 > 7 > **8** > **9** > **10** > **11** > **12** > **13** > **14** > **15**

8 Select **+ Add existing** to add items from the library and/or select items already added to the meeting.

9 Search and select items already added to the meeting.

10 Search and select items from the library.

11 Select **Add**.

12 Select **+ Create new** to create a new adhoc item for the group.

Note: Refer to slide 6 'Create adhoc items' for instructions.

13 **View** the items you've added to the group. You can also **reorder** and **remove** the items within the group.

14 Select **Create** to create the group.

15 The items will then show on the Agenda tab in a group under the group title.

Notice text

( ) Group description

( ) Group explanatory note

Items

8 [+ Add existing]   12 [+ Create new]

[Search 🔍]

Items added to meeting ︿

☐ Accept minutes of the previous meeting
☐ Financial statements
☐ Appointment of Strata Managing Agent
☑ Motion 9
☑ General business agenda item

Motions Library 10

Clear   [Cancel] [Add] 11

Items

[+ Add existing] [+ Create new]

	Title	Resolution type	
1 ⌄	Motion	Ordinary resolution	✕
2 ⌄	General business agenda item		✕

13

[Cancel] [Create] 14

4 ⌄	Group of items	15
4.1	Motion	Ordinary resolution
4.2	General business agenda item	