

PropertyIQTM

PIQ+ Meetings Libraries - Meetings Templates

Quick Reference Guide

Version 2. Mar 2025





Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Libraries - Meetings Templates**.
- Meetings templates are created and stored in a central location called the Meetings Templates library.
- A meeting template is used when creating a new meeting. All the pre-defined data from the meeting template will be copied into the new meeting, saving time and providing consistency in document design and formatting.
- Within a meeting template you can add motions, create notice and minutes document templates with merge fields, and link email templates.



What you'll learn

This guide will assist you to navigate the following:

- [View meeting templates](#)
- [Create a new meeting template](#)
- [Add motions to a meeting template](#)
- [Add and preview a notice in a meeting template](#)
- [Edit a notice in a meeting template](#)
- [Add and preview minutes in a meeting template](#)
- [Edit minutes in a meeting template](#)

Additional information included:

- [Important system behaviour](#)
- [Permissions](#)



Who should read this

- Users responsible for creating and maintaining Meeting Templates
- Strata Managers
- Administrators



Read time

11 minutes

How to view Meetings Templates

- 1 Select **Libraries** from the left hand navigation menu.
- 2 Select the **Meeting Template** tab.
- 3 A list of Meetings Templates will be shown. Select any meeting template in the list to open, view and edit.
- 4 Sort the list of meeting templates by selecting any of the column headings.
- 5 Select the **Action Menu** to archive a meeting template.
- 6 Select the **Include Archived** toggle to view archived meeting templates in the list.
- 7 Select the **+Create meeting template** to create a new meeting template.

PropertyIQ

Jacqueline Log out

Meetings

Libraries

Settings

MOTIONS

EMAIL TEMPLATES

MEETING TEMPLATES

Meeting templates

8 items

+

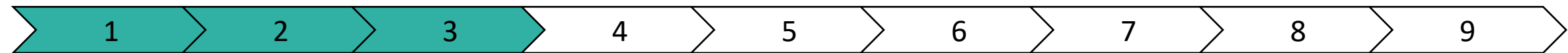
 Create meeting template

☐ Include archived

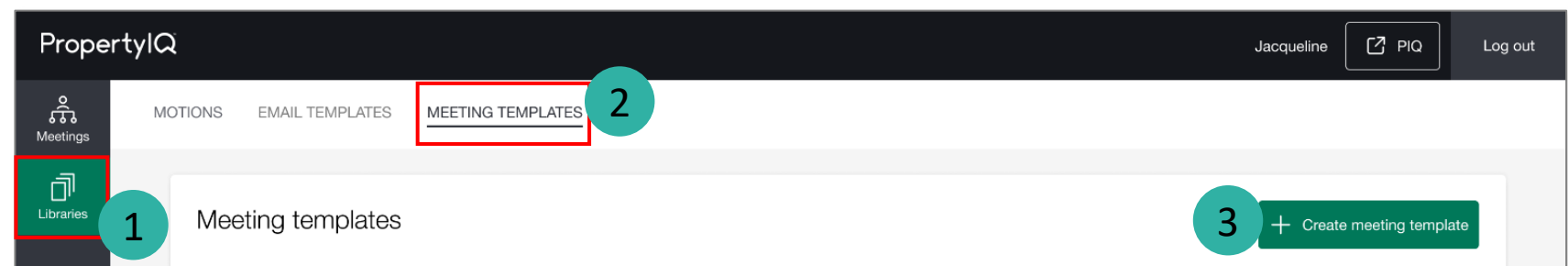
Description	Folio	Meeting type	Last updated
Annual General Meeting - Large Scheme	Global	AGM	08/05/23 by Jacqueline Reid
Annual General Meeting - Small Scheme	Global	AGM	08/05/23 by Jacqueline Reid
Committee meeting - generic	Global	Committee	08/05/23 by Jacqueline Reid
Committee meeting - pet approval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

How to create Meetings Templates

There are 9 steps to creating a Meetings Template. Below are steps 1-3.



- 1 Select the **Libraries** from the left-hand navigation menu.
- 2 Select the **Meetings Templates** tab.
- 3 Select the **+Create meeting template** to create a new meeting template.




There are 9 steps to creating a Meetings Template. Below are steps 4-9.



- 4
- Select the **Meeting Type**. The options are: AGM, Committee, General and VOCM.
Note: You cannot change this once the template is created.
- 5
- 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 cannot change this once the template is created.
- 6
- Enter an optional internal description.
- 7
- 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 4 & 5.
- 8
- 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 4 & 5.
- 9
- Select **Create** to save the meeting template.

How to add motions to a Meeting Template

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

- 1
- From within a meeting template, select the **Motions** tab.
- 2
- Select **+Add motions**, to 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 using the dropdown and selecting the desired numbered position in the list.
Note: The motions will display in the same order in a meeting as they do here in the template.
- 5
- Select  to **Preview** a motion. This will open in a new tab.
- 6
- Select **Remove** to remove a motion.

PropertyIQ

Nicki Scrivener

PIQ

Log out

Meetings

Libraries

Settings

Libraries > Meeting templates

Annual General Meeting - Small Scheme

AGM • Global

Details Motions Notice Minutes

1 + Add Motions

	Title	Motion type	Resolution type		
1	Accept minutes of the previous meeting Accept minutes (v2023)	Statutory	Ordinary resolution		Remove
2	Financial statements	Statutory	Ordinary resolution		Remove
3	Proposed budget	Statutory	Ordinary resolution		Remove
4	Insurance	Statutory	Ordinary resolution		Remove
5	Appointment of Strata Managing Agent SM Renewal 1 year (v2024)	Committee	Ordinary resolution		Remove

How to add and preview a notice in a Meeting Template

PropertyIQ

- 1
- From within a meeting template, select the **Notice** tab.
- 2
- On the **Document** 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.
- 4
- Select **Edit** to create and edit content for your meeting notice.
Note: See Slide 8 for more information.
- 5
- Preview** the notice document live on screen here.
- 6
- Select the **PDF/Print** icon to preview the notice document as a PDF/Print output.

PropertyIQ

Jacqueline

PIQ

Log out

Meetings

Libraries

Settings

Libraries > Meeting templates

Annual General Meeting – Small Scheme

AGM • Global

Details Motions Notice Minutes

Document Distribution

PDF

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}} {{Meeting venue address}}, {{Meeting venue suburb}} {{Meeting venue postcode}}	{{Teleconference information}}

Agenda

How to edit a notice in a Meeting Template

- 1 Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.
- 2 Add the content to your meeting notice.
- 3 Add **Merge fields** to your text using the merge field library. You can search, drag/drop or select and insert any fields that may be required.
- 4 Select **Save** to save your changes to the meeting notice.



TIP: Make sure you insert the merge field **{{Agenda block for notice}}** into your notice template.

This will display your agenda items and motions in the meeting notice document as a read-only block.

PropertyIQ

Jacqueline Log out

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

1 Heading 1

2

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}} {{Meeting venue address}} {{Meeting venue suburb}} {{Meeting venue postcode}}	{{Teleconference information}}

Agenda

{{Motions for agenda}}

3

4

Cancel Save

Merge fields

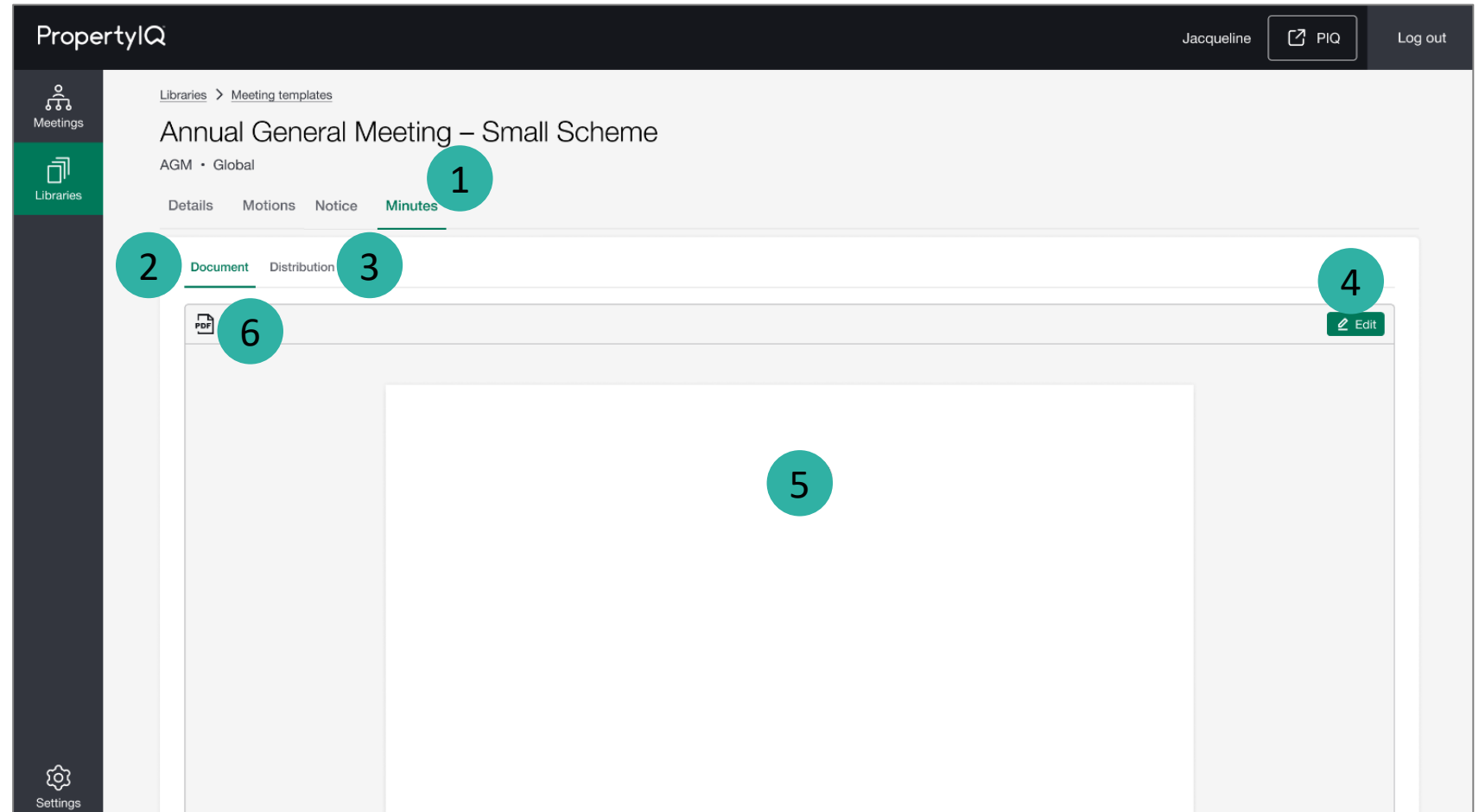
Search

Building

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

How to add and preview minutes in a Meeting Template

- 1 Select the **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.
- 4 Select **Edit** to create and edit content for your meeting minutes.
Note: See Steps on the next page for more information.
- 5 **Preview** the minutes document live on screen here.
- 6 Select the **PDF/Print** icon to preview the minutes document as a PDF/Print output.



How to edit minutes in a Meeting Template

1

Use the **editor toolbar** to apply formatting and styles, insert tables, images or hyperlinks.

2

Add the content to your meeting minutes.

3

Add merge fields to your text using the **merge field library**. You can search, drag/drop or select and insert any fields that may be required.

4

Select **Save** to save your changes to the meeting minutes.



TIP: Make sure you insert the merge field **{{Agenda block for minutes}}** into your minutes template.

This will display your agenda items and motions in the meeting minutes document as a read-only block.

General

- You must create the following email templates **before** you can create any meeting templates:
 - 1x email template of type 'meeting notice' and assigned to 'Global' folio
 - 1x email template of type 'meeting minutes' and assigned to 'Global' folio
- The Meeting Type and Folio fields of a meeting template cannot be changed once the template is created.

Motions

- When adding motions to the meeting template, the motions list will only show you motions that have the same meeting type and folio as the meeting template you're creating. For example, for a meeting template 'Meeting type = AGM', only motions with 'Applies to = AGM' will be displayed in the list.

Merge fields

- You cannot add or change merge fields within a notice or minutes document within a meeting (the merge field list is not available). Merge fields can only add/remove from a meeting template under Libraries>Meeting Templates.
- You cannot change or overwrite the merge field text in a notice or minutes document within a meeting. However, you'll be able to apply styling and formatting.
- The merge fields called 'Agenda block for notice' and 'Agenda block for minutes' cannot be added into a motion template. They are only available within Meeting Templates for notice and minutes documents.
 - You need to insert the {{Agenda block for notice}} merge field into the **notice** document of the meeting template.
 - You need to insert the {{Agenda block for minutes}} merge field into the **minutes** document of the meeting template.

Access to the meeting templates library will be determined by the user permissions set in PropertyIQ under Utilities>Security menu. If you think you have the wrong permissions, please contact your administrator to update your role permission in PIQ.

View, create, edit and archive meeting templates

Users with: Utilities> Security> Role> File – Meeting Templates	View	View meeting templates and any meeting template in the library in read-only mode.
	Create	Create meeting templates
	Edit and Archive	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.
	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.
	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.



TIP: If your administrator has updated your permissions, you will need to logout and then login again for those permissions to reflect in PIQ+.