PropertyIQ

Release Notes November 2021

PropertyIQ Version 0.227.3

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SUMMARY

LOT CATEGORISATION (VICTORIA)

1. **Lot categorisation (VIC)** – Further improvements have been made to the *Lot Categorisation* feature.

   - Secondary lot type – When a lot has been classified as a *Secondary Lot*, you can now select the type of lot it is.
     - You can select one of the following options: Carpark, Storage or Other.
     - The type 'Carpark' is selected by default for all existing and new secondary lots.
     - Changes to this field will be recorded in the global audit trail and the lot's log of changes.

     Refer screenshots below.

   - Select primary lot for a secondary lot – When a lot has been classified as a *Secondary Lot*, you can now select the primary lot that it belongs to. For example, if Lot 1 is an occupiable lot and Lot 2 is it's assigned carpark, on the lot card for Lot 2 you would classify it as a secondary lot and enter the primary lot as Lot 1.
     - For a secondary lot, the *Primary Lot* field is mandatory when editing the lot card.
     - When selecting a primary lot, you can select a lot in the same building or a different building.
     - Once a primary lot has been selected, the SP/OC/CTS number + Lot number + Unit number will be shown in the *Primary Lot* field as a preview eg *O/Corp 1234 – Lot 1 / Unit 101*.
     - You can use the view icon in the *Primary Lot* field to view the primary lot directly from the secondary lot, or use the search icon to select another primary lot at any time.

     IMPORTANT NOTES:
     - You'll still need to use the *Linking Owners* function to link lots together and have any changes on one lot propagate to other lots. Nominating the primary lot is for information purposes only.
     - Updating these details will have future benefits - there's an upcoming change that will display a list of all secondary lots on the primary lot card.

     Refer screenshots below.

   - Lot export – As a result of the improvements to the *Lot Categorisation* feature, the data in the lot export file has been updated to include additional information. The lot export file will now include:
     - A new column called 'Lot Type' which displays either *Occupiable* for primary lots or *Carpark, Storage or Other* for secondary lots.
     - A new column called 'Related Lots' which displays the primary lot or secondary lot/s related to each lot.

     Refer screenshots below.

   ! What you need to do

   a) *Secondary lot types* – For any secondary lots that are **not** carparks, you will need to reclassify them as storage or other. As this field is simply for information purposes (does not affect any functionality), you can update your lots over a period of time or when it suits you.

   b) *Primary lot for a secondary lot* – For any secondary lots, you will need to update the lot card to record the primary lot. As the field is mandatory, you will be prompted to update this field when next editing the lot card. *NOTE:* Updating these details will have future benefits - there's an upcoming change that will display a list of all secondary lots on the primary lot card.

LINK RELATED BUILDINGS

2. **Building card > Link related buildings** – On the Building card>Info tab, there is a new '*Related Buildings*' accordion that allows you to link related buildings to each other, eg multi-OC, multi-tiered or layered schemes.

   ? ***HINT for Victorian clients*** – If you are using separate buildings for multiple OCs (unlimited and limited OCs) instead of using schedules in one building, you may want to link the buildings in PIQ to easily identify them as being part of a multi-OC.

   Using the *Related Buildings* area, you can:

   - Link one or more buildings using the *Add* button
     - Once buildings are linked together, they will form a group of related buildings.
     - A building can only be linked to one group of related buildings at a time.
     - When linking buildings, if you select a building that's part of a group of related buildings, all buildings in that group will be linked and shown in the *Related Buildings* accordion of the building you're currently viewing. Because of this, you can link or unlink a building from a group by going to **any** of the buildings in the group.
   - View details of a related building in the grid
     - Details include SP/CTS/OC number, building name, total entitlements, total lots, main bank account balance and Tier (VIC only).
   - Open the building card of a related building by double clicking on the row in the grid or using the *View* button
   - Generate a related buildings report using the *Print* button
   - Unlink a building using the *Remove* button
     - You can manually unlink a building at any time.
     - Unlinking a building will not just remove it from the building you're currently viewing but will also unlink it from the group of related buildings. For example, the unlinked building will no longer show in the *Related Buildings* accordion for any building in the group.
       Because of this, you can link or unlink a building from a group by going to **any** of the buildings in the group.
     - When a linked building is made inactive, it'll be removed automatically from the group of related buildings and will no longer appear in the *Related Buildings* accordion.

   You'll need existing permissions of *Building>View* and *Building>Edit* to view and edit details within the *Related Buildings* accordion. Data access restrictions for Folio and Manager are also be applied when viewing details and linking buildings.

   IMPORTANT NOTE: The linking of buildings is for information purposes only. If a change is made to building details for a building that is linked to one or more other buildings, the change will not propagate to any of the other related buildings. Building details, reports, budgets etc will all still need to be managed separately on each building card as is currently the case for separate buildings in PIQ.

   Refer screenshots below.

LOTS – IMPORT

3. **Lot import function > New validation screen** – On the *Import Lots* screen under File>Lots>Import button where you select an import file and assign data fields, when clicking the *Import* button you will now see a second screen called *Verify Lot Data*. This new validation screen allows you to preview the data and correct any errors **before** the import is completed and lots are created.

   The *Verify Lot Data* screen has 3 different sections:

   - ***Valid data*** – Lots in this section will be imported. All assigned data fields (both optional and mandatory fields) have been provided in the file for all Lots in this section. Lots will be imported and created in PIQ without issue.
   - ***Incomplete data*** – Lots in this section will be imported. Optional data fields have not been provided or are invalid. The missing or invalid fields will be highlighted in yellow and will be left blank when creating the lot in PIQ or be defaulted using system behaviour. You can hover over the yellow field to see the error message.

- ***Invalid data*** – Lots in this section will **not** be imported. Mandatory data fields have not been provided or there is invalid data that is preventing the lot from being imported. The fields with errors will be highlighted in red and you can hover over the field to see the error message. You should correct the data before proceeding, as any lots in this section will **not** be imported.

A lot will only be shown once on this screen and in one section only. Where a lot has missing or invalid data for both optional and mandatory fields, the lot will appear in the *Invalid Data* section with both yellow and red fields.

Refer screenshots below.

TEMPLATES – UPCOMING CHANGES TO DEFT PAYMENT OPTIONS

4. **Upcoming changes to DEFT payment options** – 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.

     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.

! 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:

a) Review the list of updated templates **here**.

b) 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.

c) 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.

Refer ***Instructions - Update to New Version Templates*** and ***Tip – Copy Content Between Templates*** for help.

5. **Building schedules > Export** – When generating a building schedules export under Reporting > Building tab > Schedules accordion, inactive buildings will no longer be included in the file.
6. **Budget report** – When the *Report Disclaimer* setting is enabled under Utilities>Settings>Company Details, an issue with overlapping text on the budget report was occurring for multi-page budgets. This issue has now been fixed.

DETAILED SCREENSHOTS

ITEM 1 – LOT CATEGORISATION (VIC)

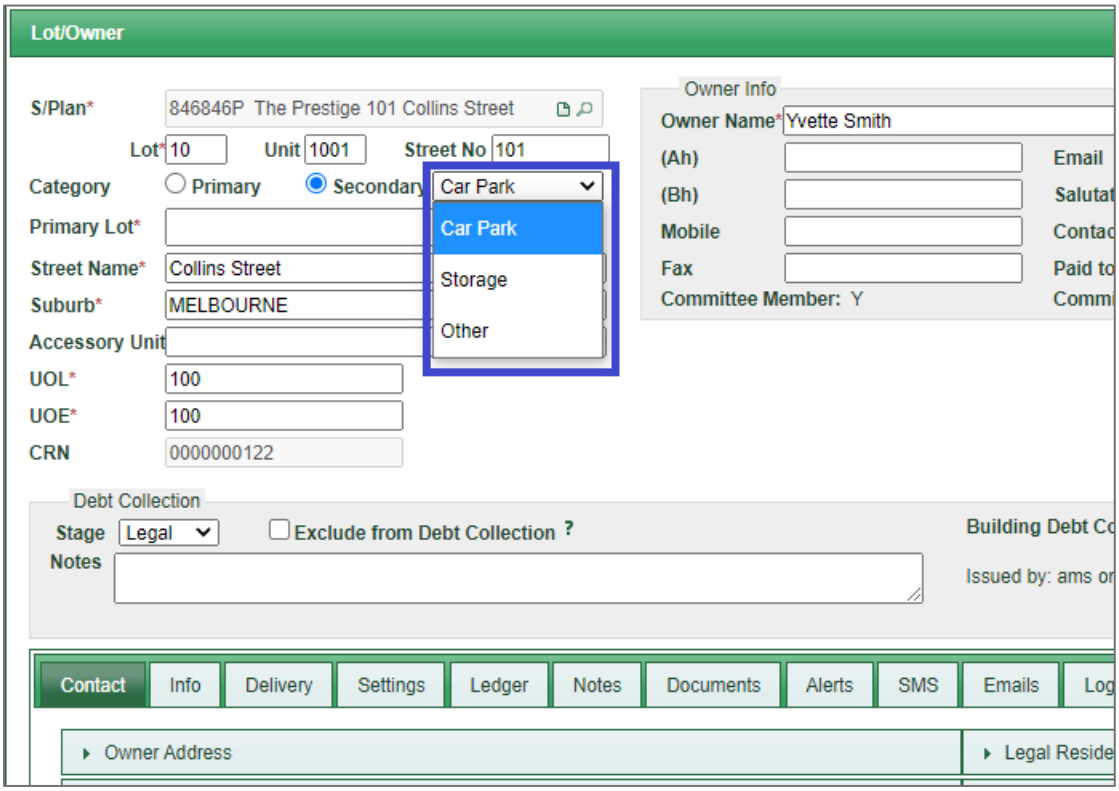
SECONDARY LOT TYPE

- When a lot has been classified as a *Secondary Lot*, you can now select the type of lot it is.
- You can select one of the following options: Carpark, Storage or Other.
- The type 'Carpark' is selected by default for all existing and new secondary lots.
- Changes to this field will be recorded in the global audit trail and the lot's log of changes.

What you need to do

For any secondary lots that are **not** carparks, you will need to reclassify them as storage or other.

As this field is simply for information purposes (does not affect any functionality), you can update your lots over a period of time or when it suits you.



SELECT PRIMARY LOT FOR A SECONDARY LOT

- When a lot has been classified as a *Secondary Lot*, you can now select the primary lot that it belongs to.

  For example, if Lot 1 is an occupiable lot and Lot 2 is it's assigned carpark, on the lot card for Lot 2 you would classify it as a secondary lot and enter the primary lot as Lot 1.
- For a secondary lot, the *Primary Lot* field is mandatory when editing the lot card.
- When selecting a primary lot, you can select a lot in the same building or a different building.
- Once a primary lot has been selected, the SP/OC/CTS number + Lot number + Unit number will be shown in the *Primary Lot* field as a preview eg *O/Corp 1234 – Lot 1 / Unit 101*.
- You can use the view icon in the *Primary Lot* field to view the primary lot directly from the secondary lot, or use the search icon to select another primary lot at any time.

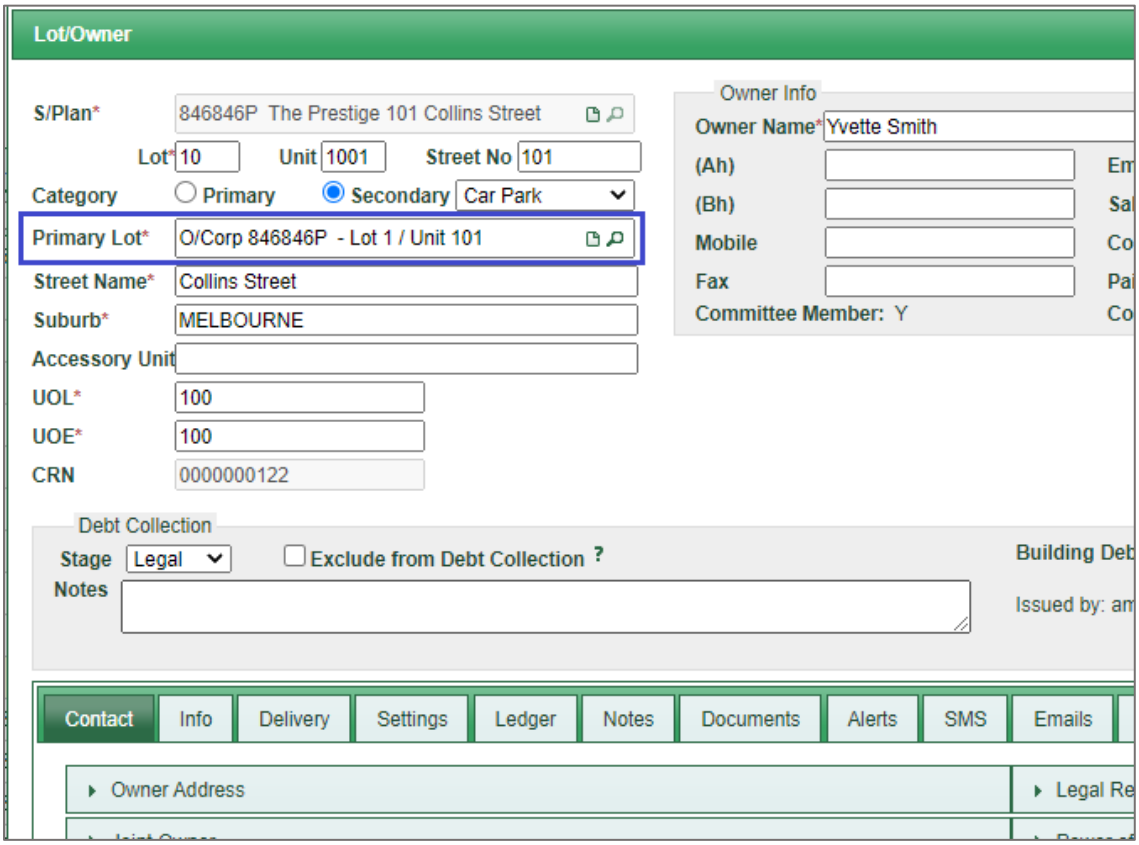
IMPORTANT NOTES:

- You'll still need to use the *Linking Owners* function to link lots together and have any changes on one lot propagate to other lots. Nominating the primary lot is for information purposes only.
- Updating these details will have future benefits - there's an upcoming change that will display a list of all secondary lots on the primary lot card.

What you need to do

For any secondary lots, you will need to update the lot card to record the primary lot.
As the field is mandatory, you will be prompted to update this field when next editing the lot card.

NOTE: Updating these details will have future benefits - there's an upcoming change that will display a list of all secondary lots on the primary lot card.



LOT EXPORT

Data in the lot export file has been updated to include additional information. The lot export file will now include:

- A new column called 'Lot Type' which displays either *Occupiable* for primary lots or *Carpark, Storage or Other* for secondary lots.
- A new column called 'Related Lots' which displays the primary lot or secondary lot/s related to each lot.

Lot type:

S/Plan	Building Nan	Street No	Street Name	Lot#	Unit#	Lot Type	Agent Id	Index	Name	Salutation	Contact	Phone 1	Ph
A	BLDG A	7	Avondale Dri	1		Car Park	1	1	Lot A				
A	BLDG A	7	Avondale Dri	2		Occupiable	2	2	Lot B				
A	BLDG A	7	Avondale Dri	3		Occupiable	3	3	Lot C				
A	BLDG A	7	Avondale Dri	4		Occupiable	31	30	Bldg A - Lot 4				
B	BLDG B	01-Aug	Hollywood D	1		Car Park	4	4	BldgB-lot1				
B	BLDG B	01-Aug	Hollywood D	2		Other	9	8	Bldg B - Lot B				
B	BLDG B	01-Aug	Hollywood D	3		Storage	11	10	BldgB-lot2				
B	BLDG B	01-Aug	Hollywood D	4		Occupiable	12	11	BldgB-lot3				
B	BLDG B	01-Aug	Hollywood D	5		Occupiable	13	12	BldgB-lot5Change			4564654	
B	BLDG B	01-Aug	Hollywood D	6		Occupiable	14	13	BldgB-lot6				

Related lots:

A	B	C	D	E	F	G	H	I	J	K	L
S/Plan	Building Nan	Street No	Street Name	Lot#	Unit#	Lot Type	Related Lots	Agent Id	Index	Name	Salutation
G1	GST Building	3551	Anywhere	3	3	Storage	O/Corp G1 - Lot 7	51	26	G1 100 lots -	lot b
G1	GST Building	3551	Anywhere	4	4	Car Park		52	27	G1 100 lots -	lot b
G1	GST Building	3551	Anywhere	5	5	Storage	O/Corp G1 - Lot 6/ Unit No 6	53	28	G1 100 lots -	lot b
G1	GST Building	3551	Anywhere	6	6	Occupiable	O/Corp G1 - Lot 5 / Unit No 5 (Storage)	54	29	G1 100 lots -	lot b
G1	GST Building	3551	Anywhere	7		Occupiable	O/Corp G1 - Lot 3 / Unit No 3 (Storage)	55	30	G1 100 lots -	lot b
G1	GST Building	3551	Anywhere	8	8	Occupiable		56	31	G1 100 lots -	lot b
G1	GST Building	3551	Anywhere	9	9	Occupiable		57	32	G1 100 lots -	lot b
H1	HNNHIHH - n	1	Clark	1	1	Other	C.T.S. H1 - Lot 10/ Unit No 10	1	1	Hannah 2	Hannah 2 Hannah
H1	HNNHIHH - n	1	Clark	2	2	Other	C.T.S. H1 - Lot 11	3	3	Hannah 2	
H1	HNNHIHH - n	1	Clark	3		Car Park	C.T.S. H1 - Lot 10/ Unit No 10	4	4	AMS	1
H1	HNNHIHH - n	1	Clark	4	4	Storage	C.T.S. H1 - Lot 10/ Unit No 10	27	14	Kelvin_1	
H1	HNNHIHH - n	1	Clark	5	5	Other	C.T.S. H1 - Lot 10/ Unit No 10	42	21	Denden_1	
H1	HNNHIHH - n	1	Clark	6	6	Car Park	C.T.S. H1 - Lot 10/ Unit No 10	150	125	tester 1123	
H1	HNNHIHH - n	1	Clark	10	10	Occupiable	C.T.S. H1 - Lot 1 / Unit No 1 (Other), C.T.S. H:	155	130	test 122	
H1	HNNHIHH - n	1	Clark	11		Occupiable	C.T.S. H1 - Lot 2 / Unit No 2 (Other)	156	131	test 122	
H1	HNNHIHH - n	1	Clark	12	12	Occupiable		157	132	test 122	
574	574 bldg - >=10 but <= 50	1		1	1	Car Park	S/Plan 574 - Lot 2/ Unit No 2	9	9	Tara H. Ferri	
574	574 bldg - >=10 but <= 50	1		2	2	Occupiable	S/Plan 574 - Lot 1 / Unit No 1 (Car Park), S/P	10	10	Tara H. Ferri	
574	574 bldg - >=10 but <= 50	1		3	3	Storage	S/Plan 574 - Lot 2/ Unit No 2	11	11	Donna D. Wood	

ITEM 2 – BUILDING CARD – LINK RELATED BUILDINGS

On the Building card>Info tab, there is a new '*Related Buildings*' accordion that allows you to link related buildings to each other, eg multi-OC, multi-tiered or layered schemes.

? ***HINT for Victorian clients*** – If you are using separate buildings for multiple OCs (unlimited and limited OCs) instead of using schedules in one building, you may want to link the buildings in PIQ to easily identify them as being part of a multi-OC.

Using the *Related Buildings* area, you can:

- Link one or more buildings using the *Add* button
    - Once buildings are linked together, they will form a group of related buildings.
    - A building can only be linked to one group of related buildings at a time.
    - When linking buildings, if you select a building that's part of a group of related buildings, all buildings in that group will be linked and shown in the *Related Buildings* accordion of the building you're currently viewing. Because of this, you can link or unlink a building from a group by going to **any** of the buildings in the group.
- View details of a related building in the grid
    - Details include SP/CTS/OC number, building name, total entitlements, total lots, main bank account balance and Tier (VIC only).
- Open the building card of a related building by double clicking on the row in the grid or using the *View* button
- Generate a related buildings report using the *Print* button
- Unlink a building using the *Remove* button
    - You can manually unlink a building at any time.
    - Unlinking a building will not just remove it from the building you're currently viewing but will also unlink it from the group of related buildings. For example, the unlinked building will no longer show in the *Related Buildings* accordion for any building in the group.
      Because of this, you can link or unlink a building from a group by going to **any** of the buildings in the group.
    - When a linked building is made inactive, it'll be removed automatically from the group of related buildings and will no longer appear in the *Related Buildings* accordion.

You'll need existing permissions of *Building>View* and *Building>Edit* to view and edit details within the *Related Buildings* accordion. Data access restrictions for Folio and Manager are also be applied when viewing details and linking buildings.

IMPORTANT NOTE: The linking of buildings is for information purposes only. If a change is made to building details for a building that is linked to one or more other buildings, the change will not propagate to any of the other related buildings. Building details, reports, budgets etc will all still need to be managed separately on each building card as is currently the case for separate buildings in PIQ.

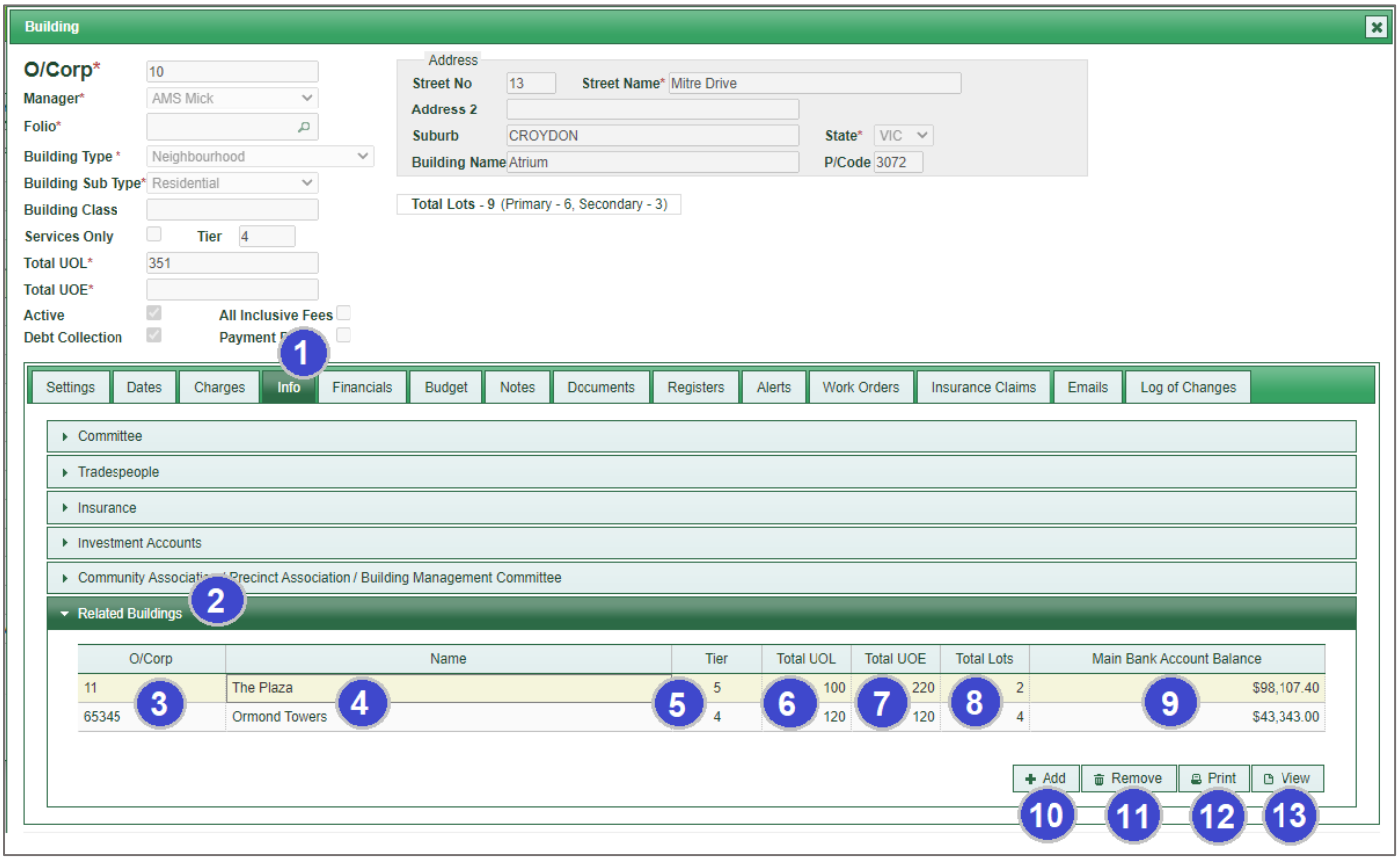
You can refer to the below instructions for more detail.

1. View related buildings accordion
2. Link a related building
3. Unlink a related building
4. Generate related buildings report

VIEW RELATED BUILDINGS ACCORDION

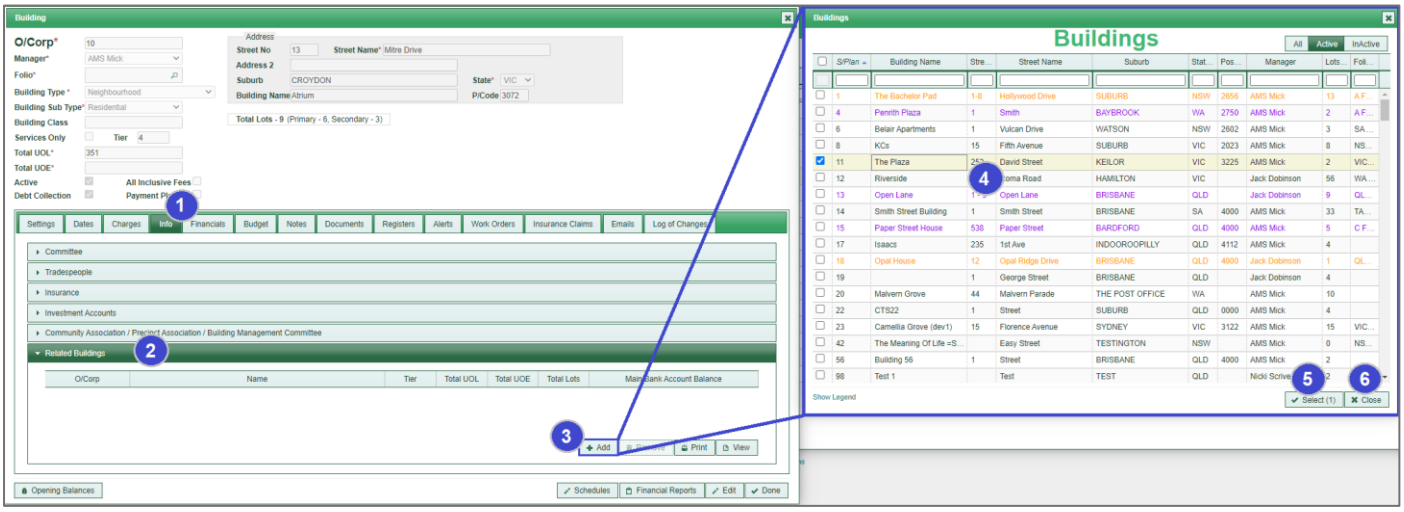
1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. The SP/CTS/OC number of the building will show here.
4. The name of the building will show here.
5. *VIC buildings* - The Tier of the building will show here.
   All other states - This column will not be shown.
6. *VIC buildings* - Total Units of Liability (UOL) for the building will show here.
   QLD buildings - Total Interest Entitlements (Int) for the building will show here.
   All other states - This column will not be shown.
7. Total Units of Entitlement (UOE) for the building will show here.
8. Total lots of the building will show here.
9. The main bank account balance of the building will show here.
10. Click *Add* to link buildings (create a new group of related buildings or add the selected building to an existing group of related buildings).
    Refer instructions *Link a Related Building* for more detail.
11. Click *Remove* to unlick a building from a group of related buildings.
    Refer instructions *Unlink a Related Building* for more detail.
12. Click *Print* to generate a related buildings report in a new browser tab.
    Refer instructions *Generate Related Buildings Report* for more detail.
13. Click *View* to open the building card of the selected building in the grid.
    Alternatively, you can double click on a row in the grid to view the building.

NOTE: Terminology and column types will change depending on the building's State.



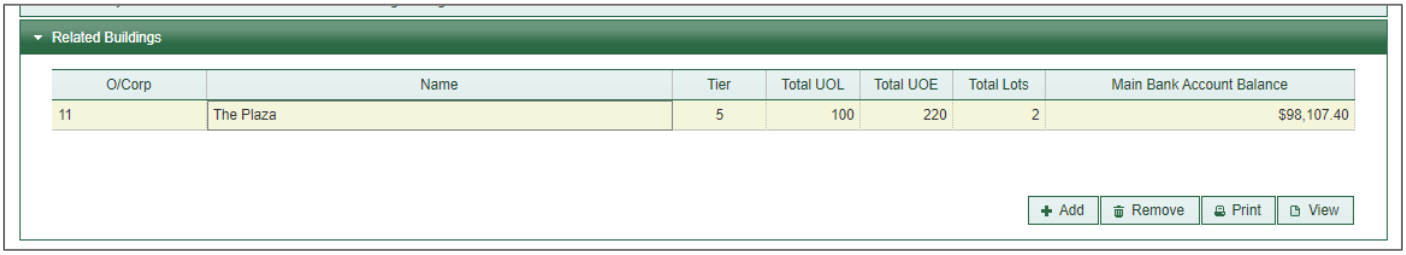
LINK A RELATED BUILDING

1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. Click *Add* to open the building list.
4. Select one or more buildings from the list.
5. Click *Select* to add the selected building/s.
6. Click *Close* to exit to return to the prior screen.



Once successfully added, the building will be shown in the grid.

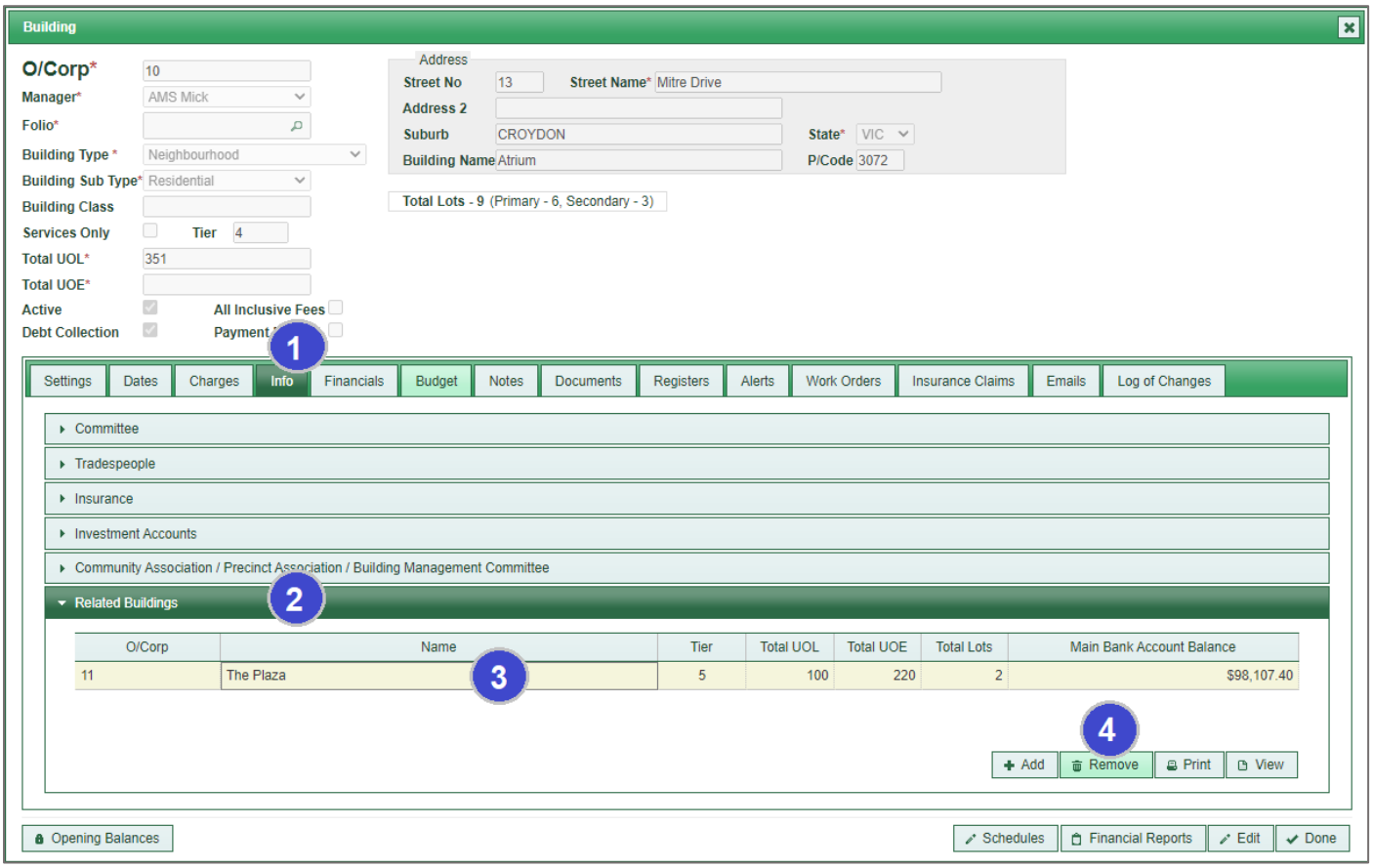
NOTE: When linking buildings, if you select a building that's part of a group of related buildings, all buildings in that group will be linked and shown in the *Related Buildings* accordion of the building you're currently viewing.



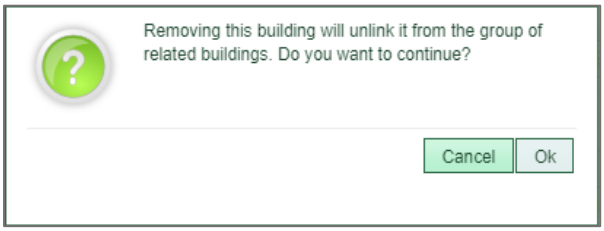
UNLINK A RELATED BUILDING

1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. Click on a building in the grid to select it.
4. Click *Remove* to unlink the selected building.

IMPORTANT NOTE: The building will be removed/unlinked from the group of related buildings, not just from the building currently being viewed.



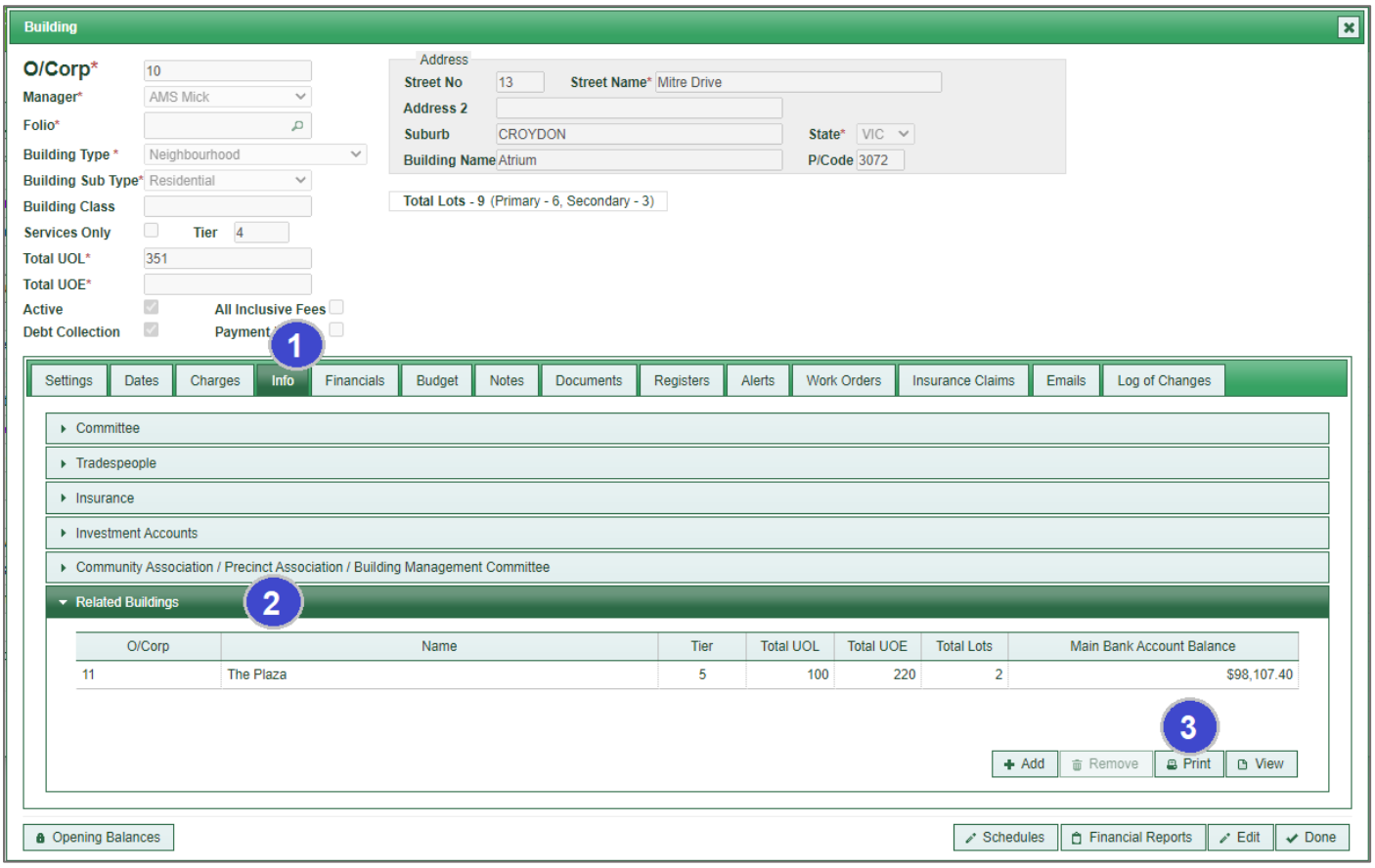
You'll see a popup that warns you that the building will be removed/unlinked from the group of related buildings. Press *OK* to proceed.



Once removed, the building will no longer show in the *Related Buildings* accordion for any building in the group.

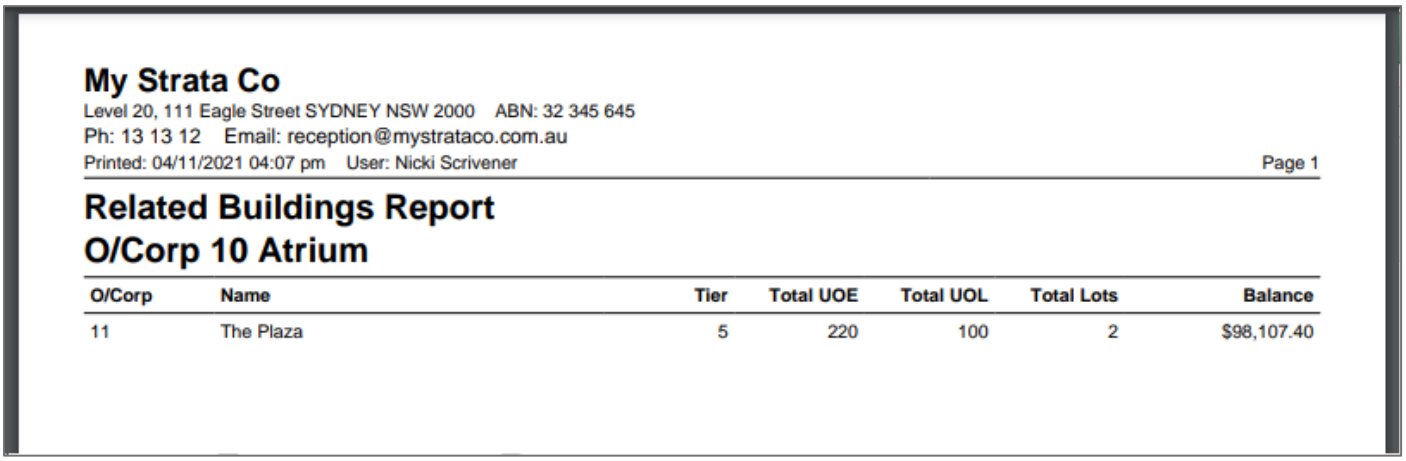
GENERATE RELATED BUILDINGS REPORT

1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. Click *Print* to generate the report in a new browser tab.



Example of Related Buildings report:

NOTE: Terminology and column types will change depending on the building's State.



My Strata Co
Level 20, 111 Eagle Street SYDNEY NSW 2000 ABN: 32 345 645
Ph: 13 13 12 Email: reception@mystrataco.com.au
Printed: 04/11/2021 04:07 pm User: Nicki Scrivener Page 1

Related Buildings Report
O/Corp 10 Atrium

O/Corp	Name	Tier	Total UOE	Total UOL	Total Lots	Balance
11	The Plaza	5	220	100	2	$98,107.40

ITEM 3 – LOT IMPORT – NEW VALIDATION SCREEN

Using the *Import Lots* screen under File>Lots>Import button where you select an import file and assign data fields, when clicking the *Import* button you will now see a second screen called *Verify Lot Data*.

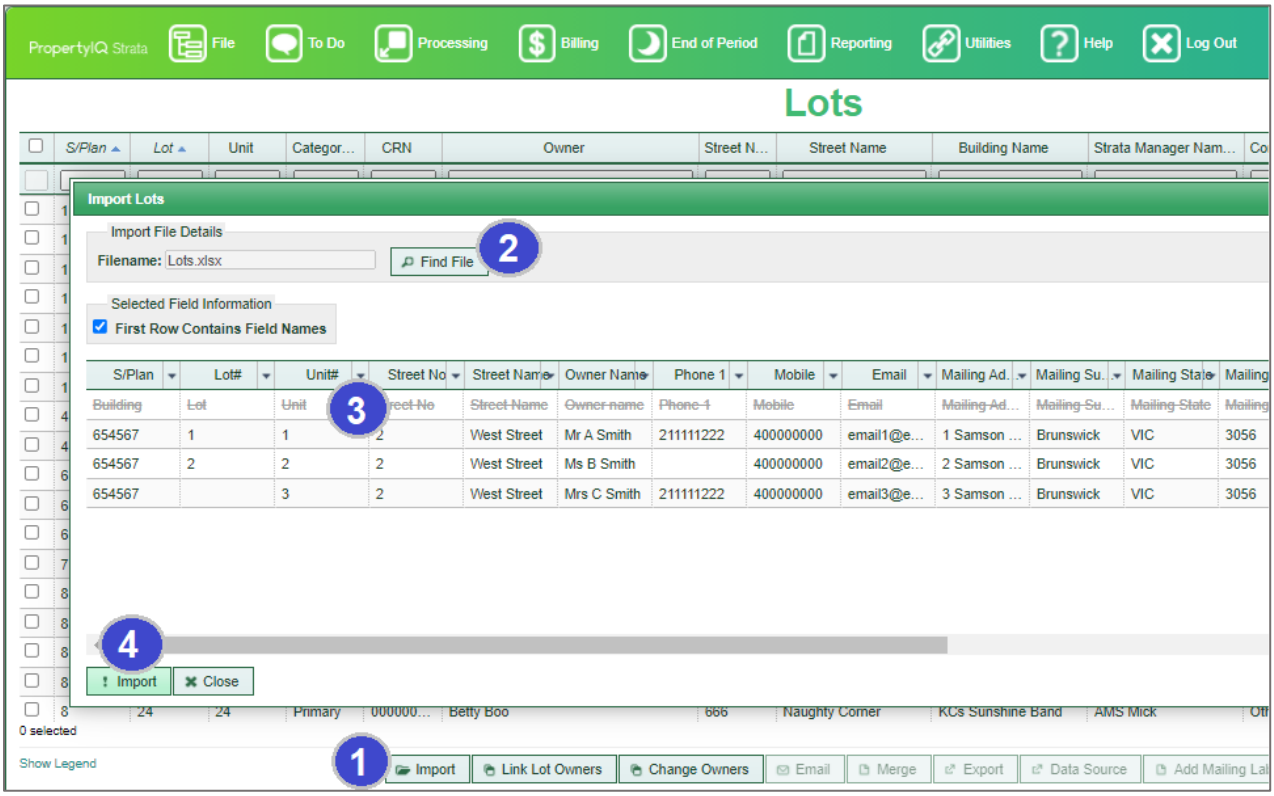
This screen allows you to preview the data and correct any errors **before** the import is completed and lots are created.

The *Verify Lot Data* screen has 3 different sections:

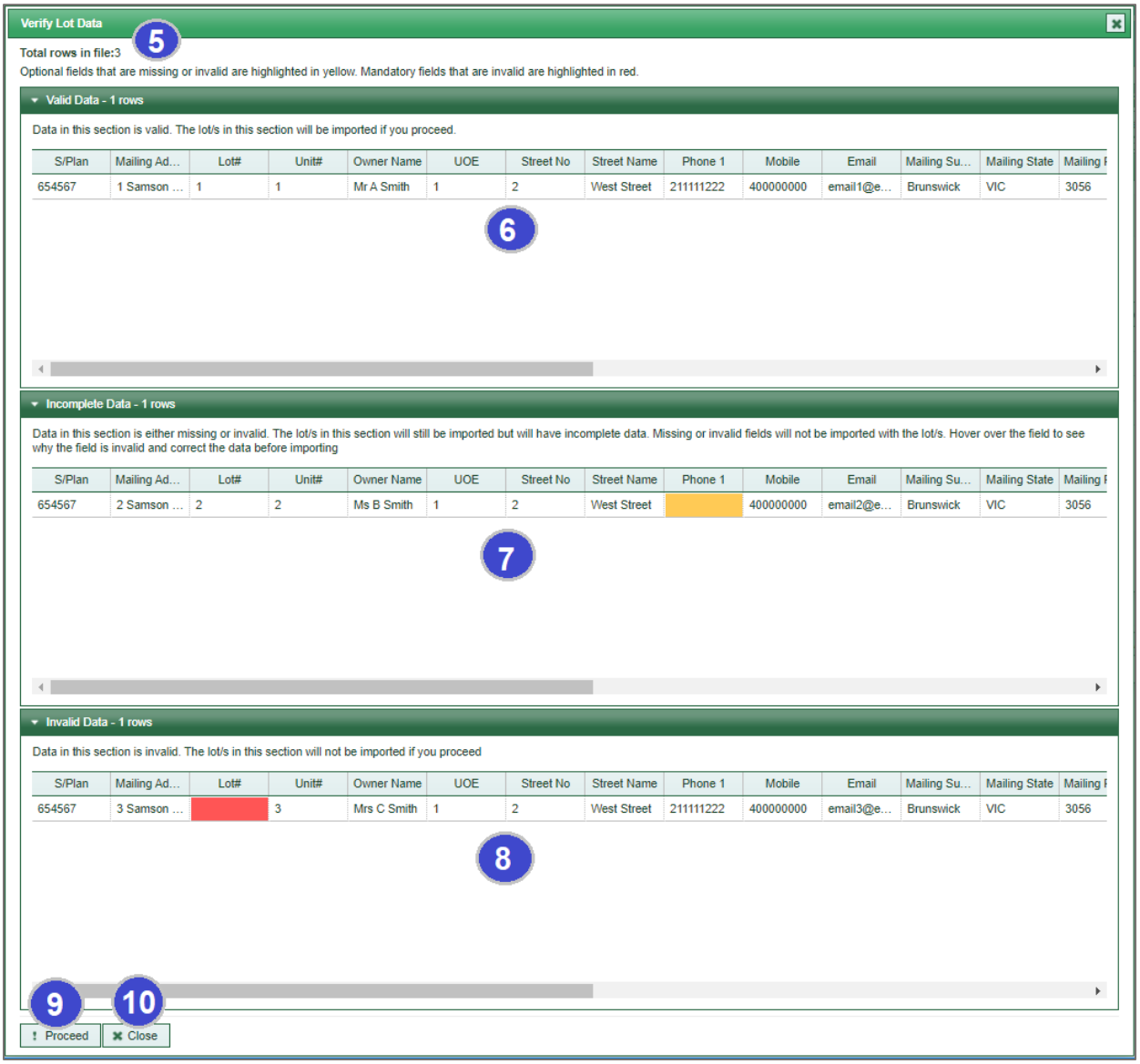
- ***Valid data*** – Lots in this section will be imported. All assigned data fields (both optional and mandatory fields) have been provided in the file for all Lots in this section. Lots will be imported and created in PIQ without issue.
- ***Incomplete data*** – Lots in this section will be imported. Optional data fields have not been provided or are invalid. The missing or invalid fields will be highlighted in yellow and will be left blank when creating the lot in PIQ or be defaulted using system behaviour. You can hover over the yellow field to see the error message.
- ***Invalid data*** – Lots in this section will **not** be imported. Mandatory data fields have not been provided or there is invalid data that is preventing the lot from being imported. The fields with errors will be highlighted in red and you can hover over the field to see the error message. You should correct the data before proceeding, as any lots in this section will **not** be imported.

A lot will only be shown once on this screen and in one section only. Where a lot has missing or invalid data for both optional and mandatory fields, the lot will appear in the *Invalid Data* section with both yellow and red fields.

1. Go to *File>Lots screen>Import* button
2. Find and upload your import file
3. Using the column headings, assign data fields to the data you wish to import (as per current process)
4. Click the *Import* button



5. The total number of rows in the file will show here. You can use this to validate the number of lots that are being imported.
6. *Valid data* – Lots in this section will be imported without issue as all data fields (optional and mandatory) have been provided.
7. *Incomplete data* – Lots in this section will be imported with missing or invalid data for optional fields. Fields with errors are highlighted in yellow. Hover over the field to see the error message.
8. *Invalid data* – Lots in this section will **not** be imported as they have missing or invalid data that is preventing the lot from being imported. Fields with errors are highlighted in red. Hover over the field to see the error message.
9. Click *Proceed* once you've reviewed all the data and wish to proceed with the import. This will create a new task in the sidebar and lots will be created.
10. Click *Close* to return to the prior screen, correct any missing or invalid data and try again.



ITEM 4 - UPCOMING CHANGES TO DEFT PAYMENT OPTIONS

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.

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.

! 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.

Refer ***Instructions - Update to New Version Templates*** and ***Tip – Copy Content Between Templates*** for help.

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):

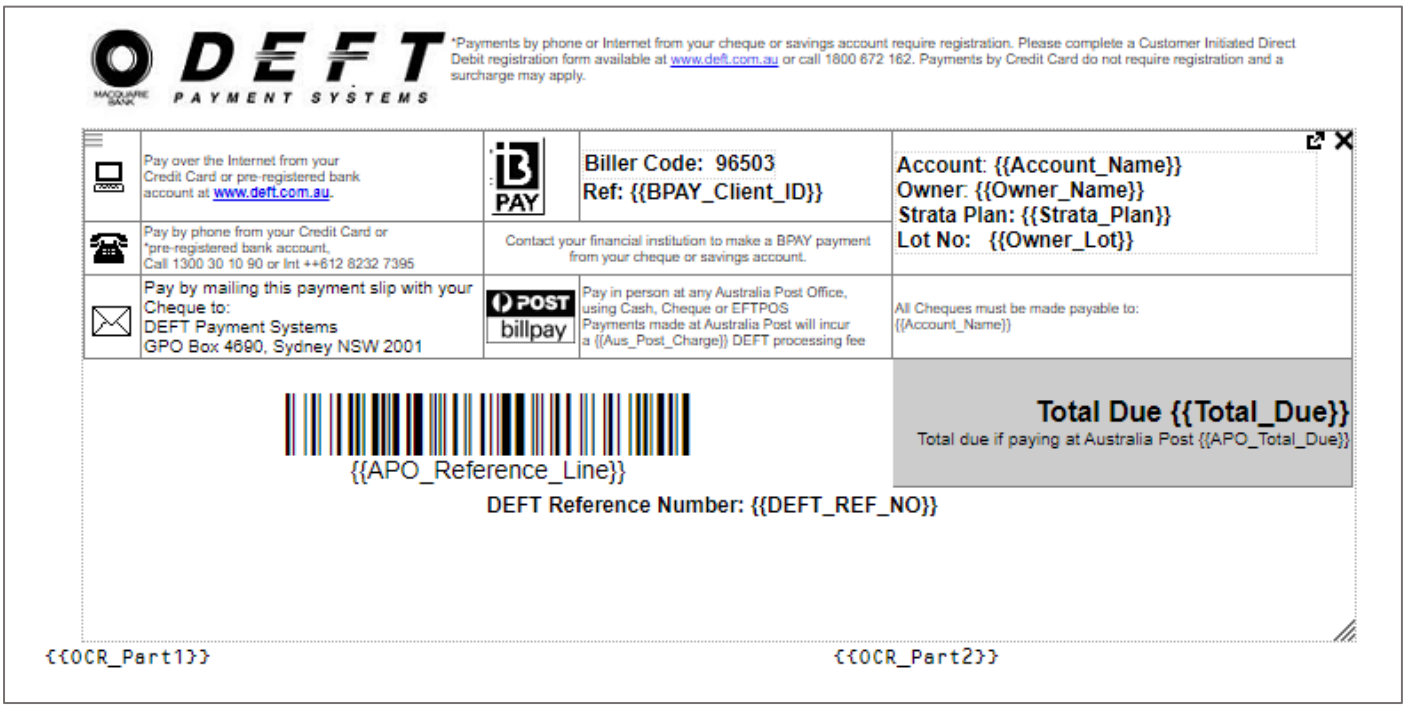
- **Due/Fee notices**
  - Due Notice / Fee Notice
  - Due Notice / Fee Notice (CA)
  - Due Notice / Fee Notice (Co)
- **Fee Notice Summary** [VIC only]
- **Special levy/fee notices**
  - Special Notice
  - Special Notice (CA)
  - Special Notice (Co)
- **Arrears notices**
  - Arrears Notice
  - Arrears 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

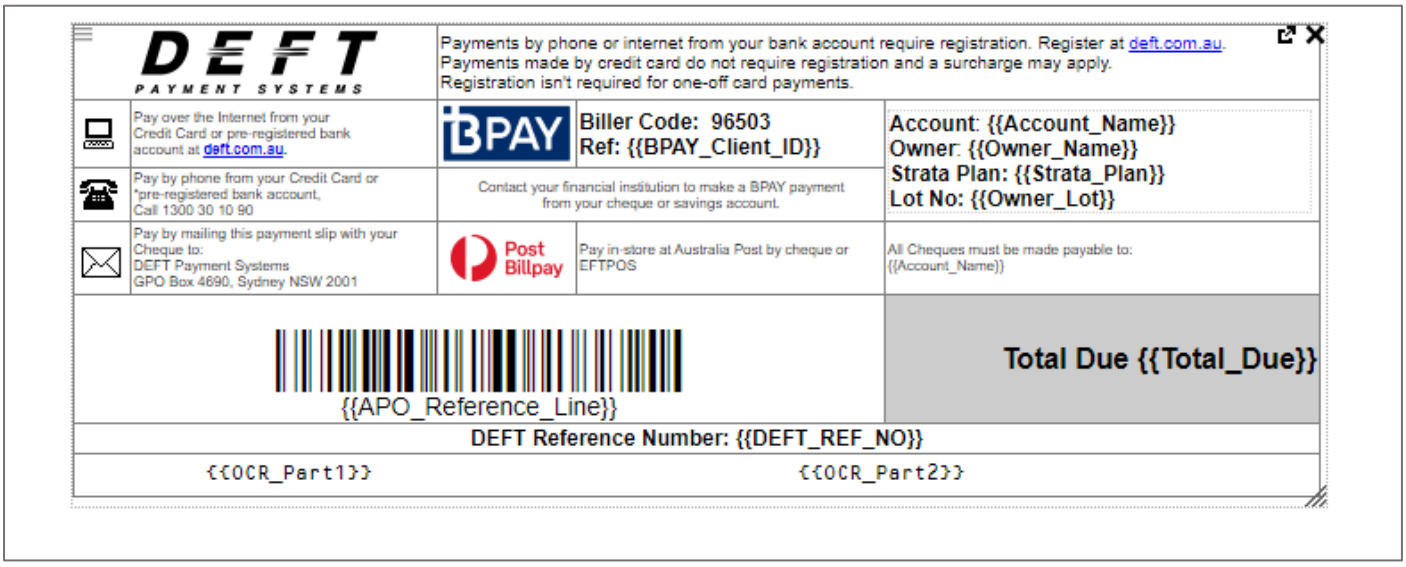
The main changes include:

- 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:



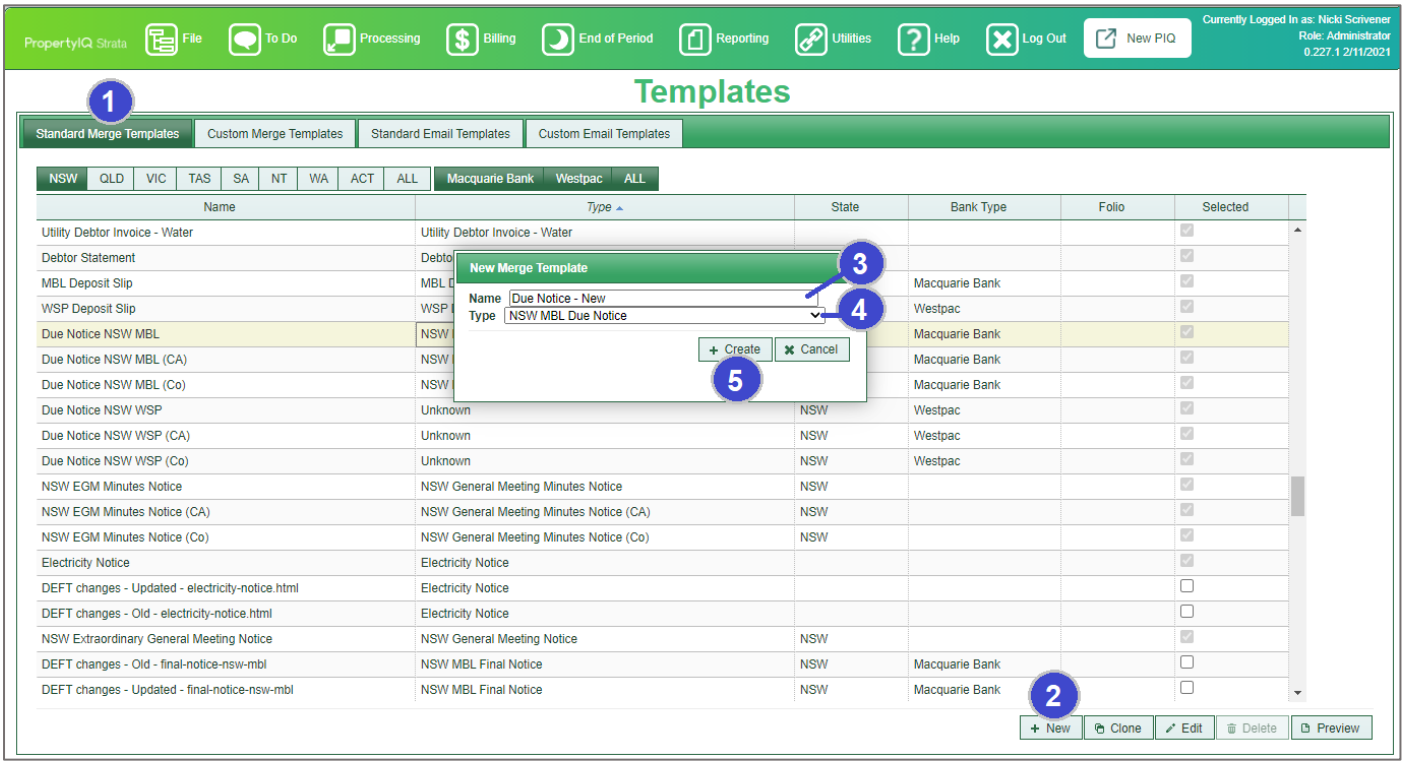
New version:



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.

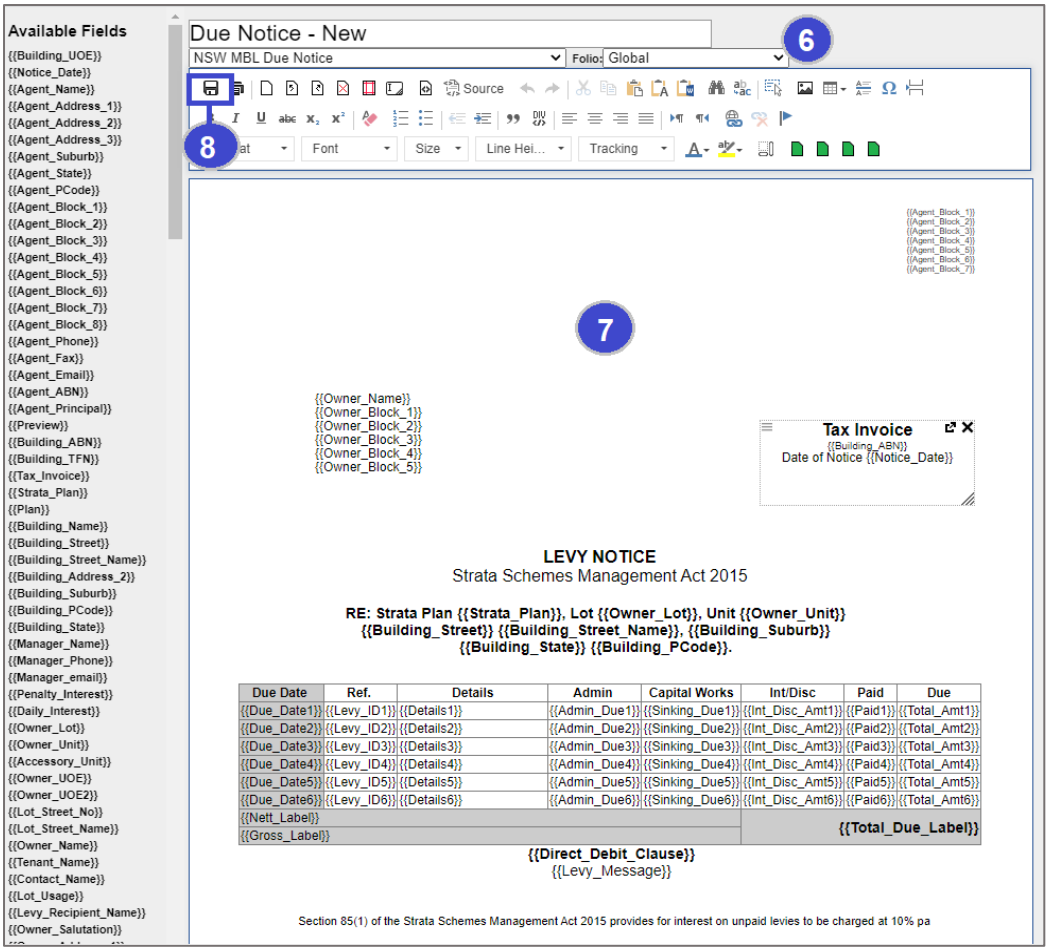


6. Change the properties of the template if required eg Folio.
7. Customise the content of the template to suit your needs eg insert Logo, add text and reformat.

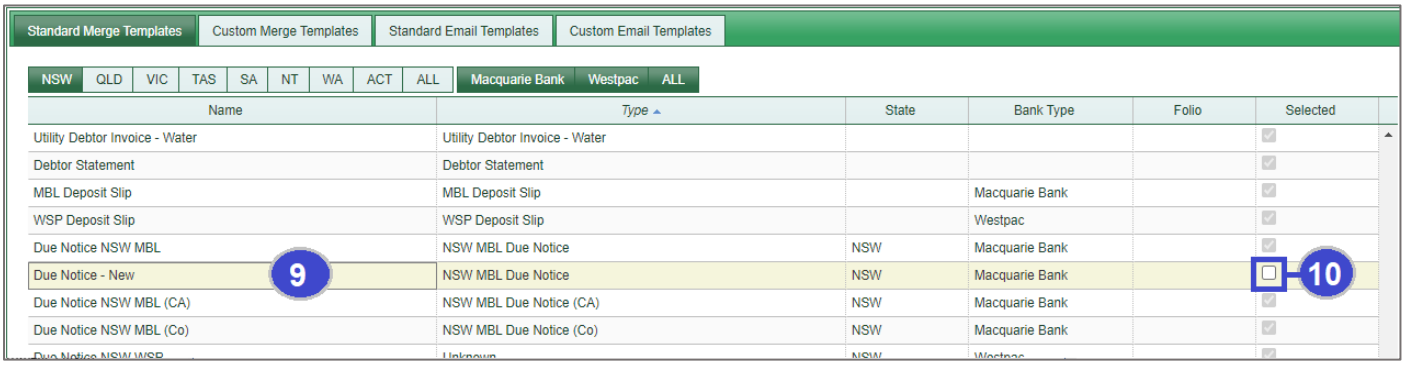
   ! ***IMPORTANT NOTE:***

   - *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:

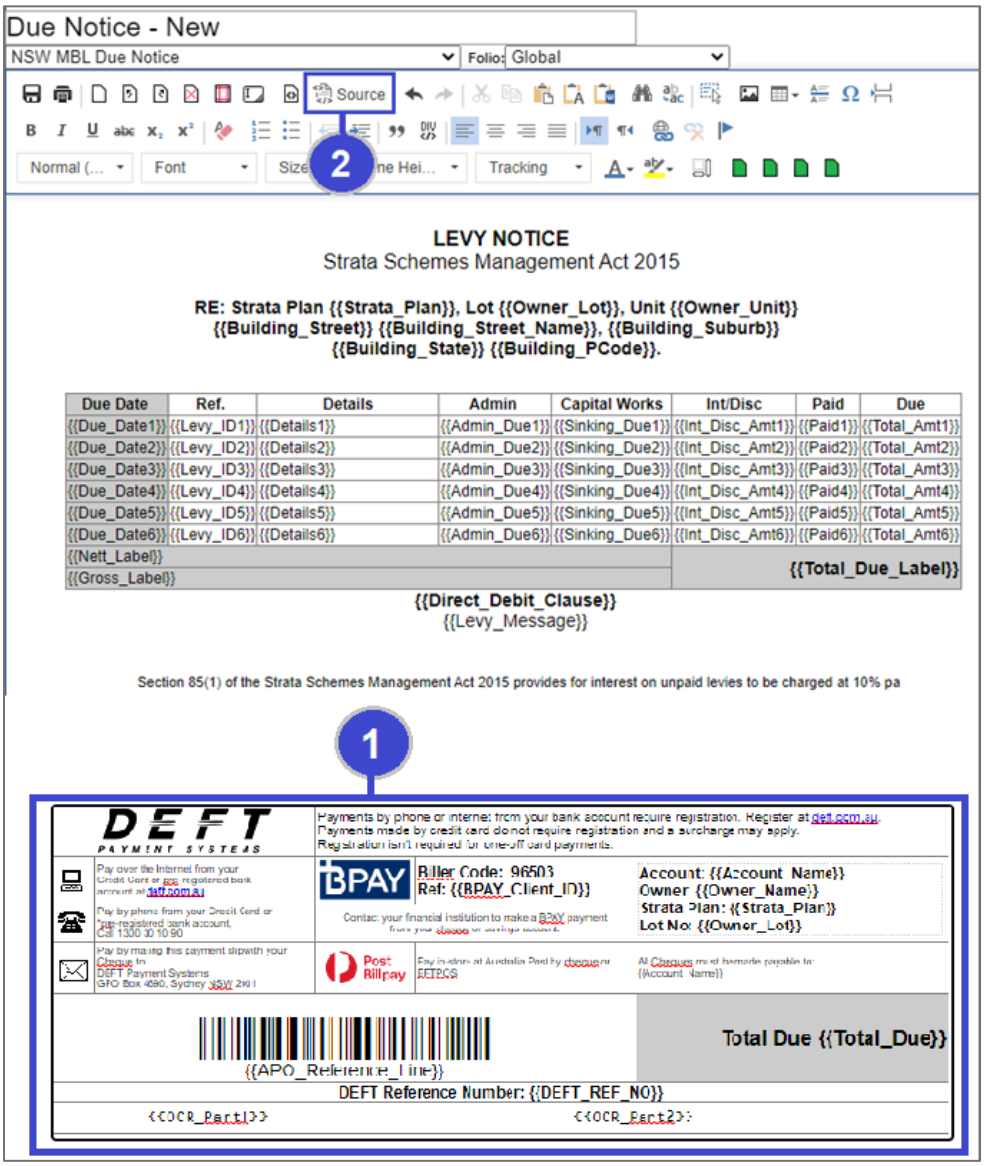
- copy a logo or all the content in a text box from Template A to Template B; or,
- copy the new DEFT payment slip from the new version template (available in this release) into your old templates, to continue using your old templates with customised content but with the new DEFT payment slip.

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

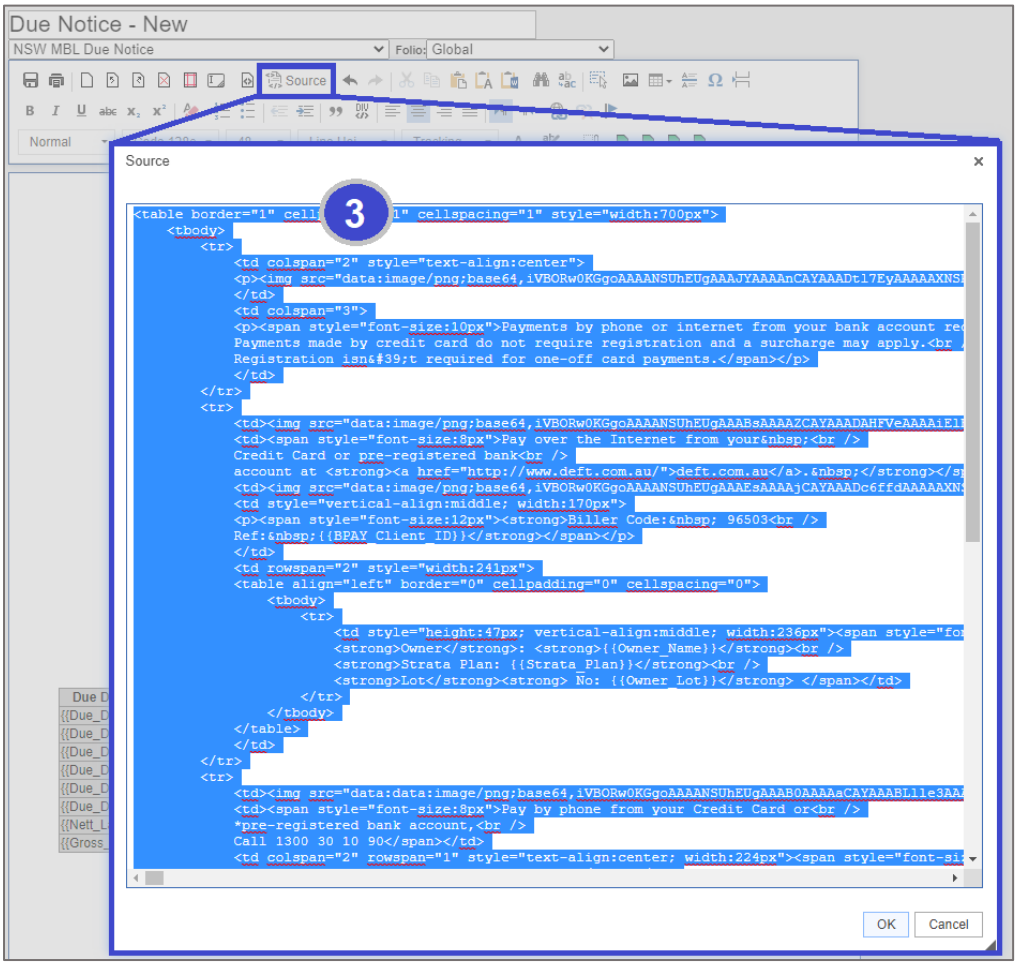
Go to the NEW template

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.

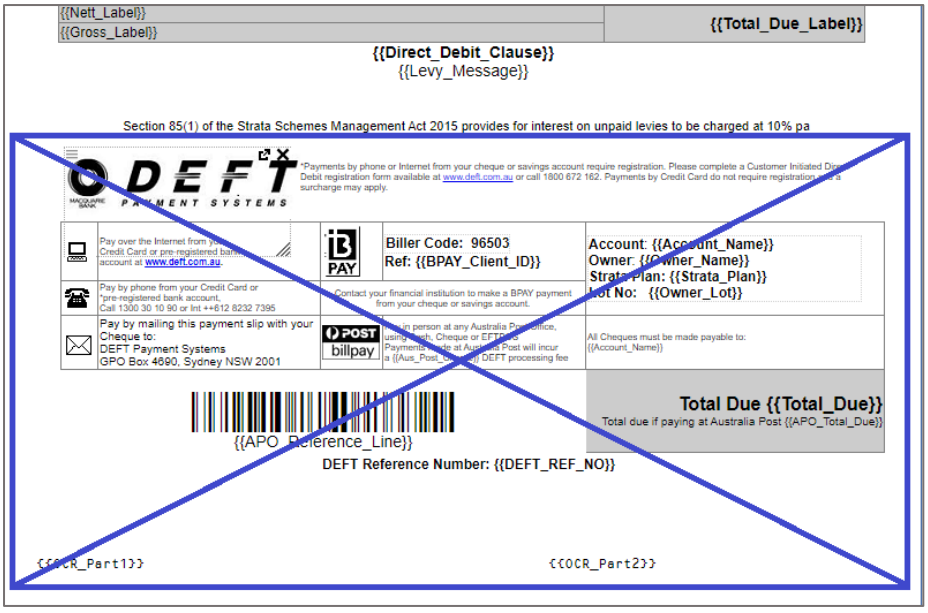


3. In the *Source* popup window, **highlight and copy ALL** the content in the box (To select all; on your keyboard press Ctrl+A. To copy; right mouse click on content and select copy, or on your keyboard press Ctrl+C).

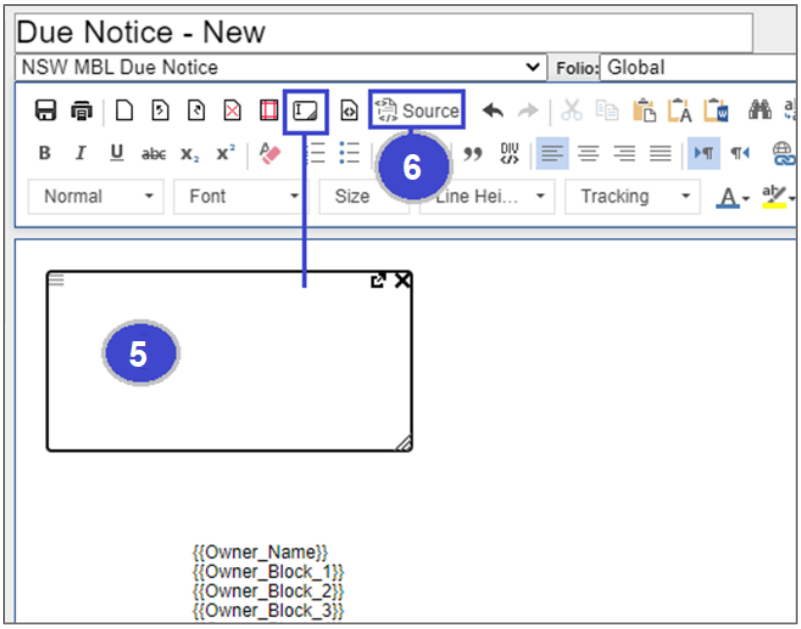


Go to the OLD/EXISTING template you want to update

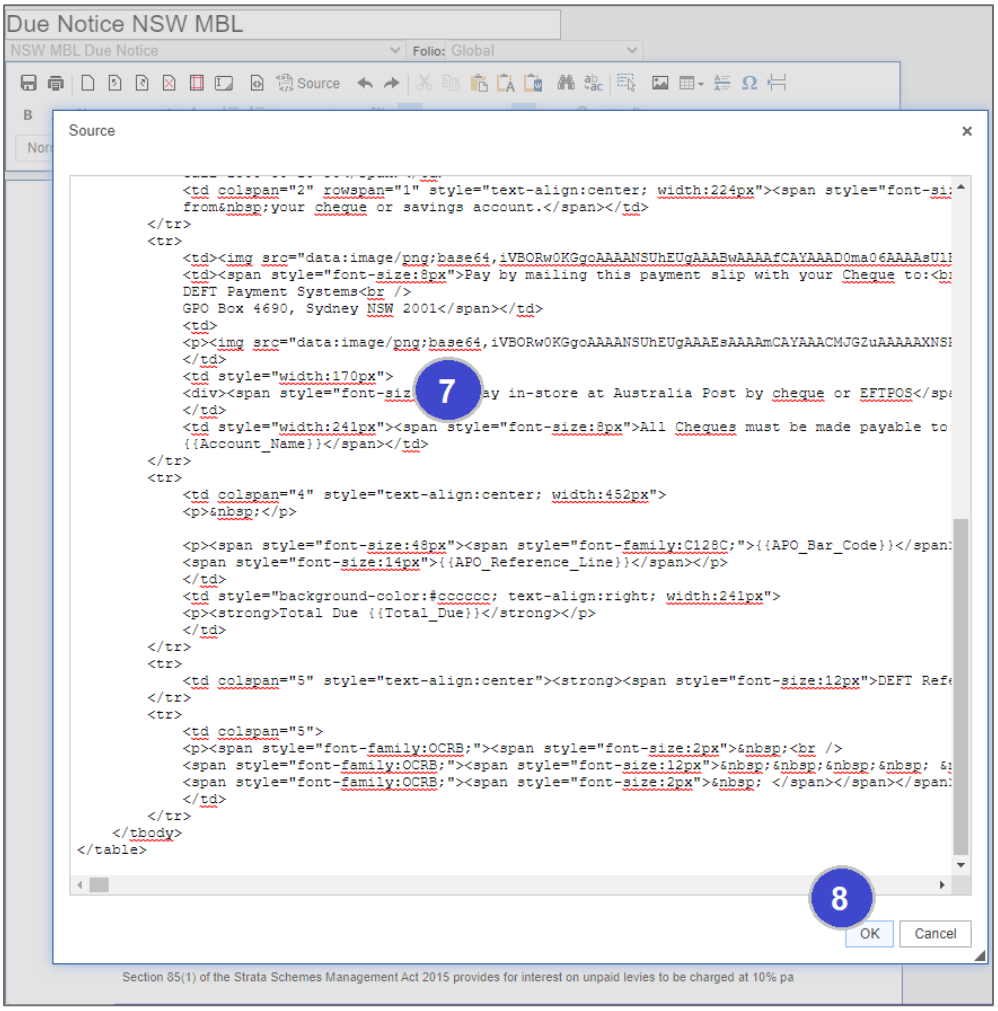
4. Scroll down to the bottom of the template and **delete ALL** the individual text boxes that form the DEFT payment slip (within the blue box area below). You can delete each text box by clicking on the ✕ icon in the top right corner of each text box.



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.

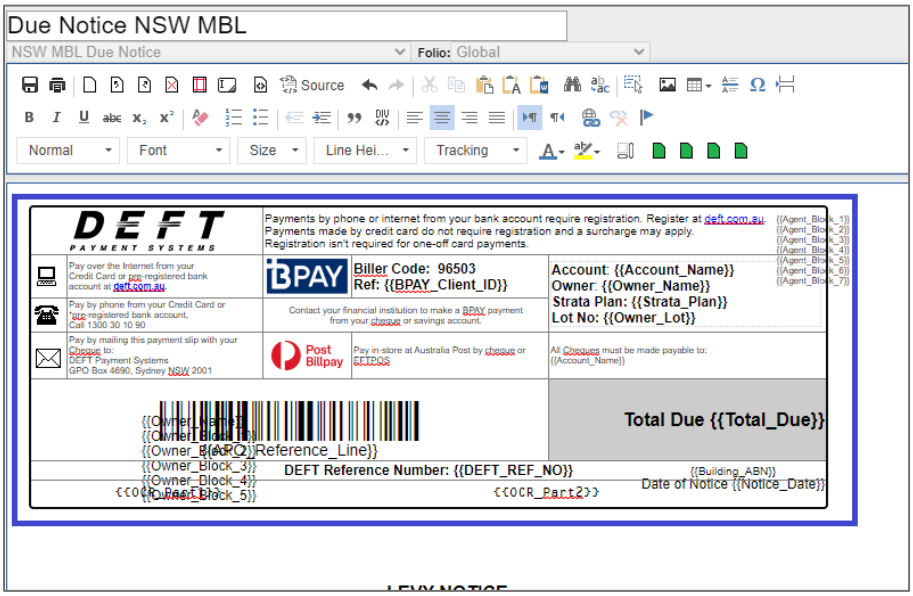


7. In the *Source* popup window, paste the content in the box (To paste; right mouse click on content and select paste, or on your keyboard press Ctrl+V).
8. Click *OK* to save.

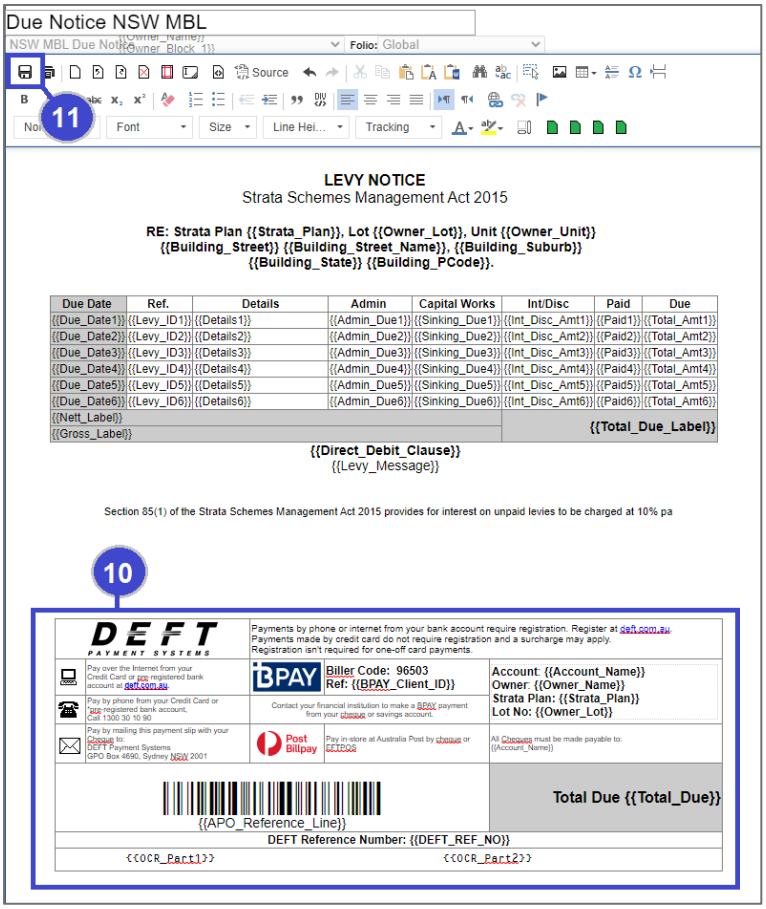


9. The new DEFT payment slip will now appear in the text box, or wherever your mouse cursor was located at the time you used the Source button.

   ? ***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).*