



Guide to updating templates

DEFT changes 2024

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INTRODUCTION

By November 2024, Macquarie will no longer offer cash and cheque services across all banking products. They're also switching off the DEFT automated phone payments service used to make payments over the phone.

To learn more about these changes, visit deft.com.au/change, visit Macquarie's [support page](#) or speak to Macquarie relationship manager.

As a result of the changes, we're updating system templates in PropertyIQ, providing you with new DEFT payment details in the approved format. The **new templates will be available in our December update** which will be released from **6 December 2023**.

You can also download the [DEFT digital payer guide](#) and share this with your lot owners and payers. When distributing notices, you can include this flyer by adding it as a notice attachment under *Utilities>Settings>Cover Pages And Attachments*.

All notice and invoice templates with DEFT payment details have received a range of changes, including:

- Updated logos
- Reformatted and simplified payment options
- Removed reference to payments using DEFT phone payments services
- Removed reference to cheque payments via DEFT PO Boxes

! **What you need to do – Action by 1 February 2024**

As soon as they're available, you'll need to update your templates to ensure the new DEFT payment details are being used and distributed in your invoice and levy runs.

Please update the templates by **1 February 2024** to align with the changes coming into effect 1 March 2024.

What you need to do by 1 February 2024:



Review list of updated templates.

All notice and invoice templates with a DEFT payment slip have received a range of changes. You can view the list of updated templates [here](#).



Create new templates in your PIQ.

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, the same way you had for your old templates.



Apply new templates as system defaults.

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 details.

LIST OF UPDATED TEMPLATES

All notice and invoice templates with DEFT payment details 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) [NSW]
 - Due Notice / Fee Notice (Co) [Qld]
- **Fee Notice Summary** [VIC only]
- **Special levy/fee notices**
 - Special Notice
 - Special Notice (CA) [NSW]
 - Special Notice (Co) [Qld]
- **Arrears notices**
 - Arrears Notice
 - Arrears Notice (CA) [NSW]
 - Arrears Notice (Co) [Qld]
- **Final notices**
 - Final Notice
 - Final Notice (CA) [NSW]
 - Final Notice (Co) [Qld]
- **Legal notices**
 - Legal Notice
 - Legal Notice (CA) [NSW]
 - Legal Notice (Co) [Qld]
- **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 – Water
 - Utility Debtor Invoice – Other Utility
 - Utility Debtor Statement
- **Utility invoices** (used by standard utility billing feature)
 - Electricity Notice
 - Gas Notice
 - Water Notice
 - Other Utility Notice

EXAMPLE - PREVIOUS VS NEW TEMPLATE COMPARISON







The template changes include:

- Updated logos
- Reformatted and simplified payment options
- Removed reference to payments using DEFT phone services
- Removed reference to cheque payments via DEFT mailbox

Previous version:

		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.	
	Pay over the Internet from your Credit Card or pre-registered bank account at deft.com.au .		Billers 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
			Account: {{Account_Name}} Owner: {{Owner_Name}} Strata Plan: {{Strata_Plan}} Lot No: {{Owner_Lot}}
 {{APO_Reference_Line}}			Total Due {{Total_Due}}
DEFT Reference Number: {{DEFT_REF_NO}}			
{{OCR_Part1}}		{{OCR_Part2}}	

New version:

		
<h3>Ways to pay</h3>		
		
CARD OR DIRECT DEBIT	BPAY	POST BILLPAY
DEFT Reference Number 304472806 1111617	Billers Code: 96503 Ref: 304472806 1111617	 *496 304472806 1111617
Visit deft.com.au to pay by card or direct debit. Payments may attract a surcharge.	Mobile & Internet Banking - BPAY Make this payment from your preferred bank account.	Pay in-store at Australia Post by eftpos or cheque. Cheques payable to Belair Apartments S/P 6
BPAY® Registered to BPAY Pty Ltd ABN 69 079 137 518.		

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 e.g. Due Notice – New.
4. In the Type dropdown, select the template you want to create e.g. 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 PropertyIQ Strata Templates interface. At the top, there's a navigation bar with icons for File, To Do, Processing, Billing, End of Period, Reporting, Utilities, Help, Log Out, and New PIQ. The user is logged in as Nicki Scrivener, Role: Administrator, on 0.227.1 2/11/2021. The main section is titled 'Templates' and has tabs for Standard Merge Templates, Custom Merge Templates, Standard Email Templates, and Custom Email Templates. The 'Standard Merge Templates' tab is active, showing a table with columns: Name, Type, State, Bank Type, Folio, and Selected. A 'New Merge Template' dialog box is open, with fields for Name (Due Notice - New) and Type (NSW MBL Due Notice). The dialog has buttons for '+ Create' and 'x Cancel'. The table lists various templates, including 'Due Notice NSW MBL' and 'Due Notice NSW WSP'. A 'New' button is at the bottom right of the table.

6. Change the properties of the template if required e.g. Folio.
7. Customise the content of the template to suit your needs e.g. 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.

Available Fields

- {{Building_UOE}}
- {{Notice_Date}}
- {{Agent_Name}}
- {{Agent_Address_1}}
- {{Agent_Address_2}}
- {{Agent_Address_3}}
- {{Agent_Suburb}}
- {{Agent_State}}
- {{Agent_PCode}}
- {{Agent_Block_1}}
- {{Agent_Block_2}}
- {{Agent_Block_3}}
- {{Agent_Block_4}}
- {{Agent_Block_5}}
- {{Agent_Block_6}}
- {{Agent_Block_7}}
- {{Agent_Block_8}}
- {{Agent_Phone}}
- {{Agent_Fax}}
- {{Agent_Email}}
- {{Agent_ABN}}
- {{Agent_Principal}}
- {{Preview}}
- {{Building_ABN}}
- {{Building_TFN}}
- {{Tax_Invoice}}
- {{Strata_Plan}}
- {{Plan}}
- {{Building_Name}}
- {{Building_Street}}
- {{Building_Street_Name}}
- {{Building_Address_2}}
- {{Building_Suburb}}
- {{Building_PCode}}
- {{Building_State}}
- {{Manager_Name}}
- {{Manager_Phone}}
- {{Manager_email}}
- {{Penalty_Interest}}
- {{Daily_Interest}}
- {{Owner_Lot}}
- {{Owner_Unit}}
- {{Accessory_Unit}}
- {{Owner_UOE}}
- {{Owner_UOE2}}
- {{Lot_Street_No}}
- {{Lot_Street_Name}}
- {{Owner_Name}}
- {{Tenant_Name}}
- {{Contact_Name}}
- {{Lot_Usage}}
- {{Levy_Recipient_Name}}
- {{Owner_Salutation}}

Due Notice - New

NSW MBL Due Notice

Font Size Line Height Tracking

8

7

6

9

10

Tax Invoice

Date of Notice {{Notice_Date}}

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						Total Due Label	

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

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.

Standard Merge Templates									
Custom Merge Templates									
Standard Email Templates									
Custom Email Templates									
NSW	QLD	VIC	TAS	SA	NT	WA	ACT	ALL	
Macquarie Bank Westpac ALL									
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 - New	NSW MBL Due Notice	NSW	Macquarie Bank		<input 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 MBL (WSP)	Unknown	NSW	Westpac		<input checked="" type="checkbox"/>				

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 details from the new version template into your old templates, to continue using your old templates with customised content but with the new DEFT payment details.

Below is an example of how to copy the new DEFT payment details 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 details.
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

1

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

MACQUARIE BANK

DEFT PAYMENT SYSTEMS

Ways to pay

CARD OR DIRECT DEBIT

DEFT Reference Number
{{DEFT_REF_NO}}

Visit deft.com.au to pay by card or direct debit.
Payments may attract a surcharge.

BPAY

Biller Code: 96503
Ref: {{BPAY_Client_ID}}

Mobile & Internet Banking - BPAY
Make this payment from your preferred bank account.

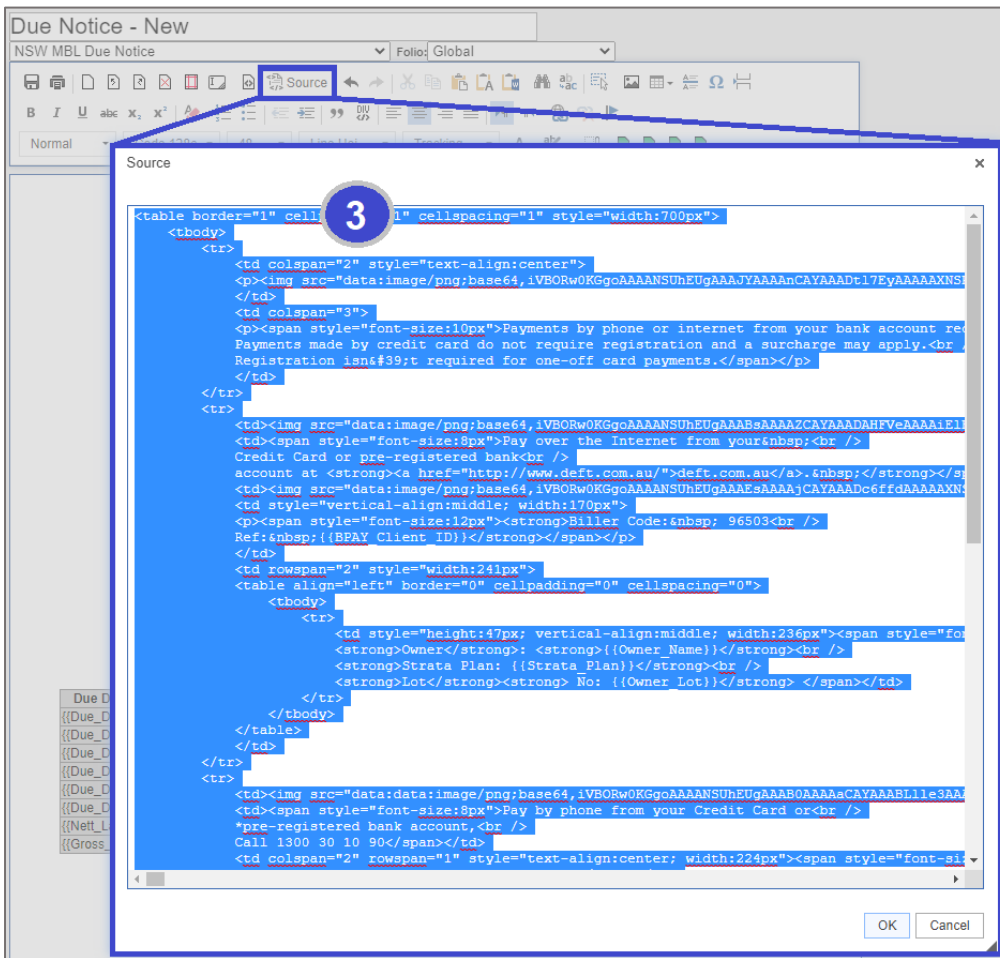
POST BILLPAY

Post Billpay

Pay in-store at Australia Post by eftpos or cheque.

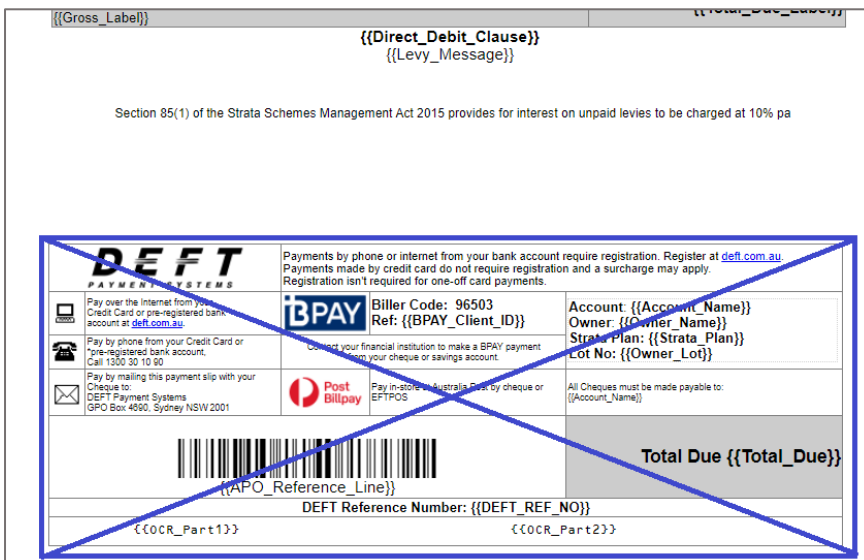
BPAY® Registered to BPAY Pty Ltd ABN 69 079 137 518.

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

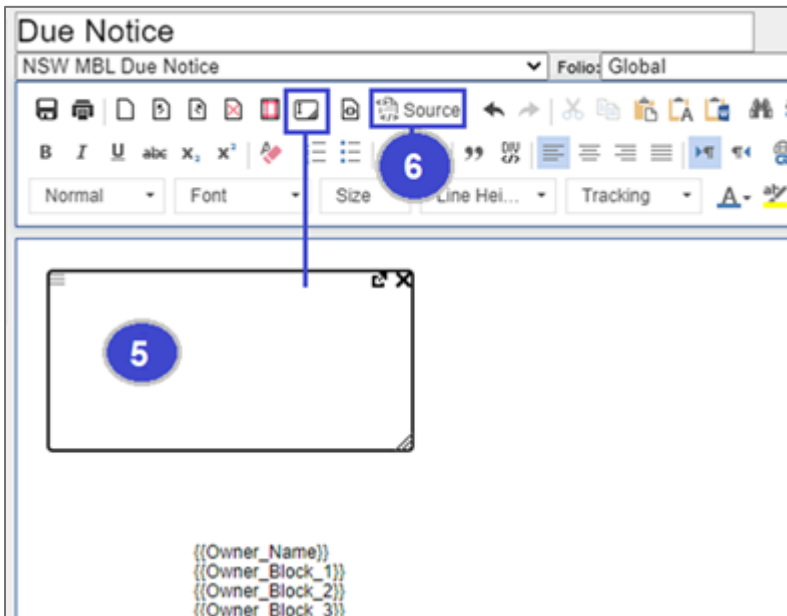


Go to the OLD/EXISTING template you want to update

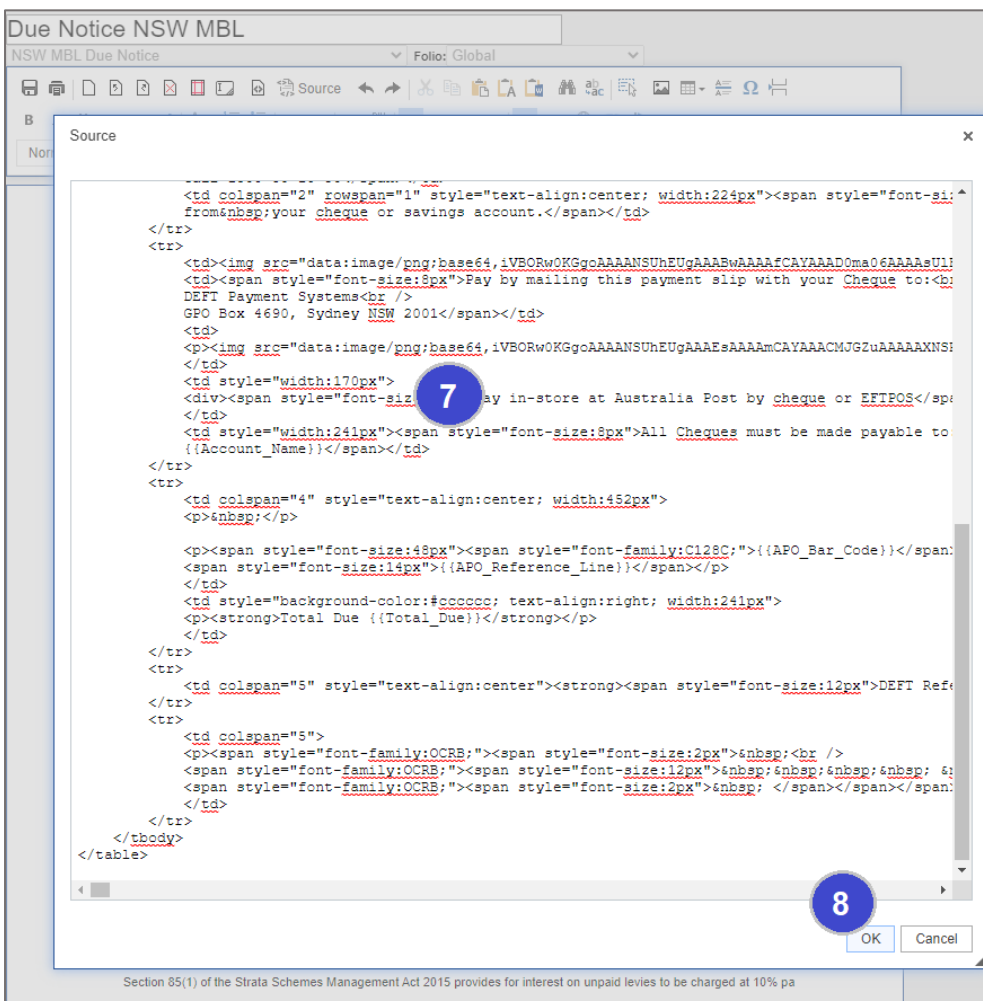
4. Scroll down to the bottom of the template and **delete** the text box/es that form the DEFT payment details (within the blue box area below). You can delete a text box by clicking the **X** icon in the top right corner of the text box.



5. Create a new textbox in the template. You can do this by click the textbox icon in the top menu, as highlighted.
- a. 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
- a. 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 Due Notice Follo: Global

Source Tracking

MACQUARIE BANK **DEFT PAYMENT SYSTEMS**

Ways to pay

<p>CARD OR DIRECT DEBIT</p> <p>DEFT Reference Number {{DEFT_REF_NO}}</p> <p>Visit deft.com.au to pay by card. Payments may attract a charge.</p> <p>BPA® Registered to BPA® Pty Ltd (A/CN 118 751 518)</p>	<p>BPAY</p> <p>Billor Code: 96503 Ref: {{BPAY_Client_ID}}</p> <p>Mobile & Internet Banking - BPAY Make this payment from your preferred bank account.</p>	<p>POST BILLPAY</p> <p>{{APO_Reference_Line}}</p> <p>Pay in-store at Australia Post cheque.</p> <p>Tax Invoice</p> <p>Date of Notice {{Notice_Date}}</p>
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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.

Due Notice

NSW MBL Due Notice Folio: Global

11

{{Building_Street}} {{Building_Street_Name}}, {{Building_Suburb}}
{{Building_State}} {{Building_PCDE}}

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}}							

{{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

MACQUARIE BANK

**DEFT
PAYMENT SYSTEMS**

Ways to pay

CARD OR DIRECT DEBIT

DEFT Reference Number
(DEFT_REF_NO)

Visit [deft.com.au](#) to say by card or direct debit.
Payments may attract a surcharge.

BPAY

Billor Code: 96503
Ref: (BPAY_ClientID)

Mobile & Internet Banking - BPAY
Make this payment from your preferred bank account.

POST BILLPAY

({APO_Reference_Line})

Pay in-store at Australia Post by eftpos or cheque.

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You can repeat this process to copy the new DEFT payment details into each of your existing templates (replace the old payment details with the new).