Buildings – Info tab

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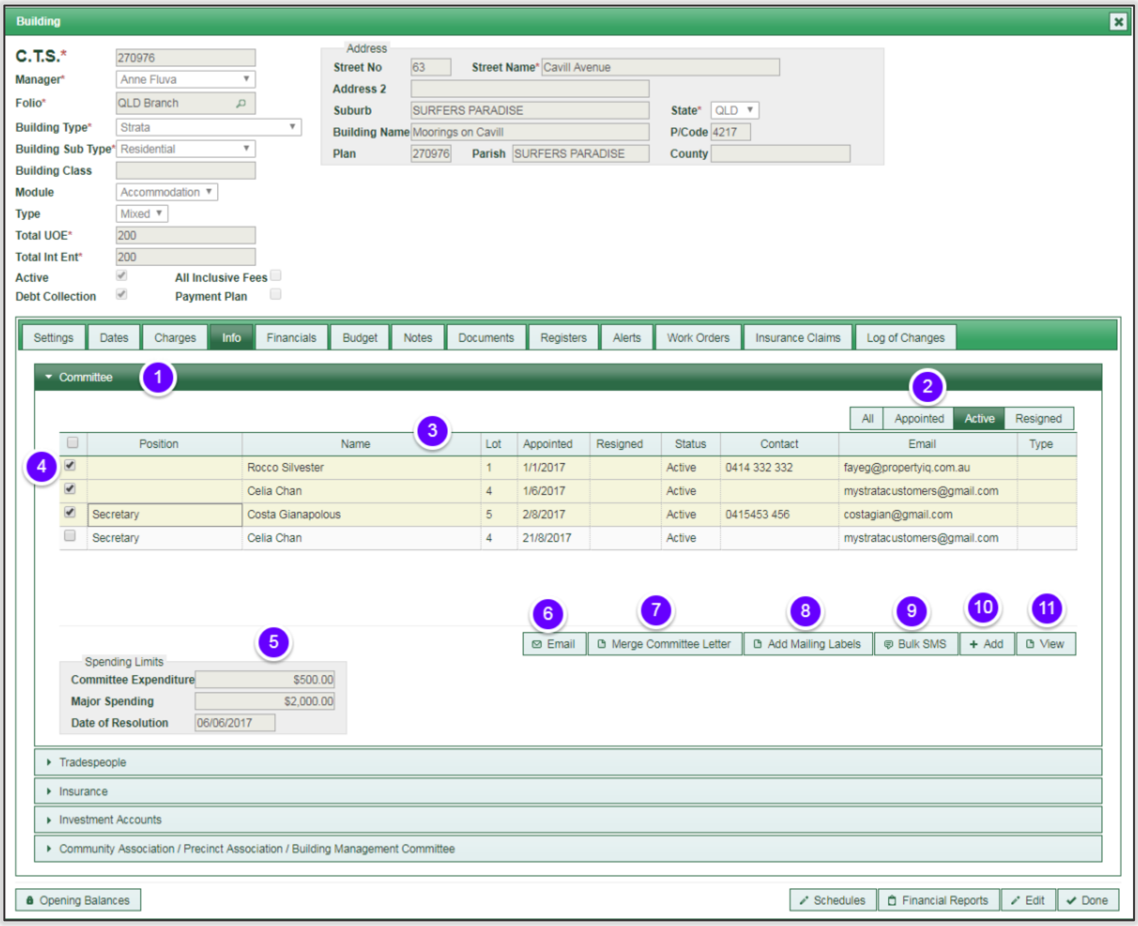
INFO TAB

The Info tab holds all the information about committee members, preferred tradespeople, insurance policies, investment accounts and precinct/community associations or other entities that this building is a part of.

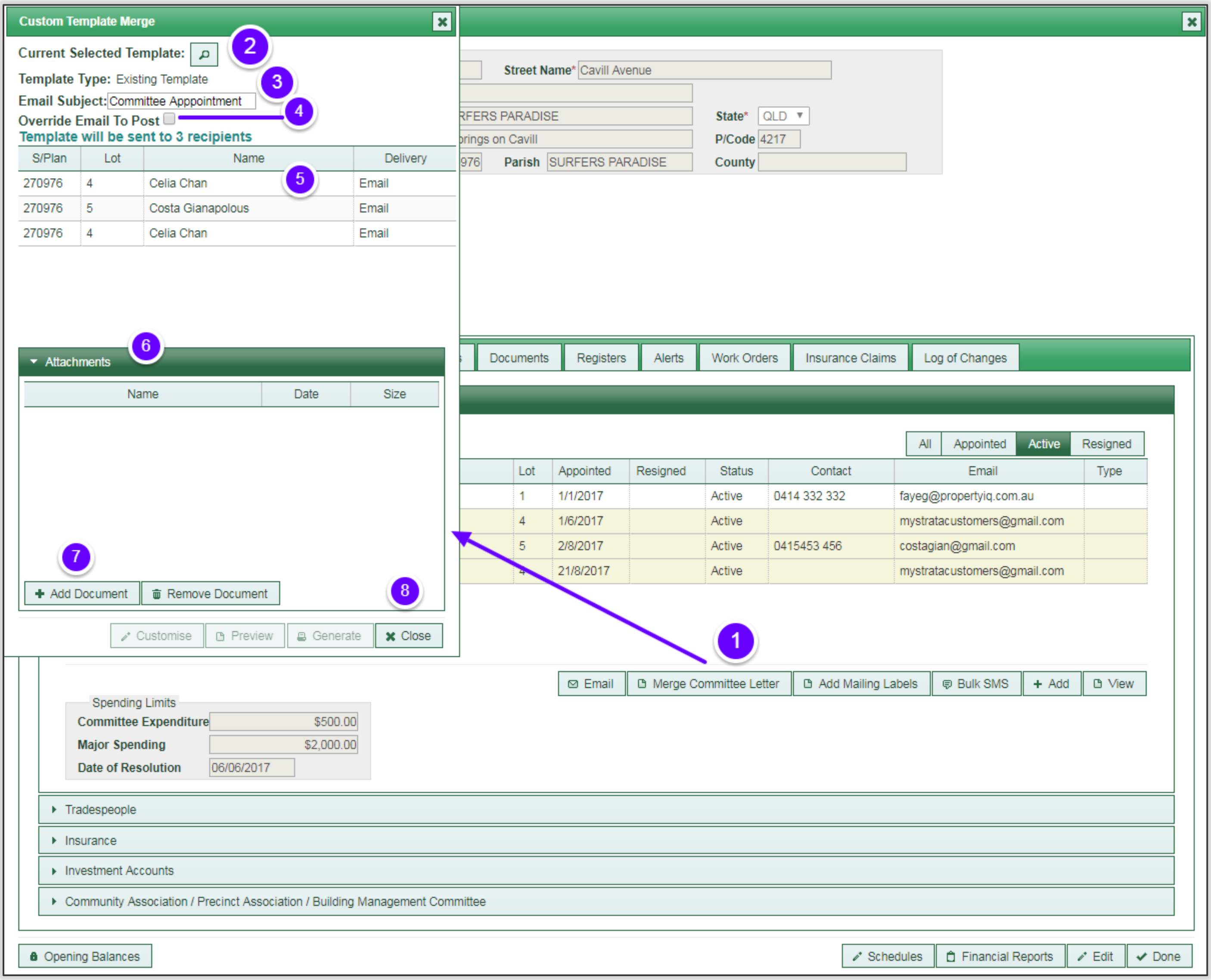
COMMITTEE

1. This is where you record all the members of the building's committee or council. Click on the white arrow to open
2. The screen defaults to view active committee members but you can click on the tabs to switch your view to all, appointed, active or resigned
3. The committee member's details show here
4. Click in the boxes to select individual committee members or click on the top line to select them all
5. You can record any committee spending limits here. This does not affect any other part of PropertyIQ, it is just for your information
6. Once you have selected at least one committee member on the screen, the email button will no longer be greyed out and you can click to email the selected members. Clicking on the *Email* button opens your email program and automatically inputs the selected members as recipients. NOTE: Emails sent by this method are not saved in PropertyIQ and committee member will be able to see each email address.
7. Once you have selected at least one committee member on the screen, the *Merge Committee Member* button will no longer be greyed out and you can click to email the selected members. See below for mail merging instructions
8. Once you have selected at least one committee member on the screen, the *Mailing Labels* button will no longer be greyed out and you can click to create mailing labels for the selected members. This creates a job in the mailing labels centre for you to print later. For full details on mailing labels, see the manual "Mailing Labels"
9. If you are subscribed to the SMS service and you have selected at least one committee member on the screen, the *Bulk SMS* button will no longer be greyed out and you can click to bulk SMS the selected members.
10. Click the *+Add* button to add a new committee member. See instruction below
11. Click *View* to view an individual committee member's card



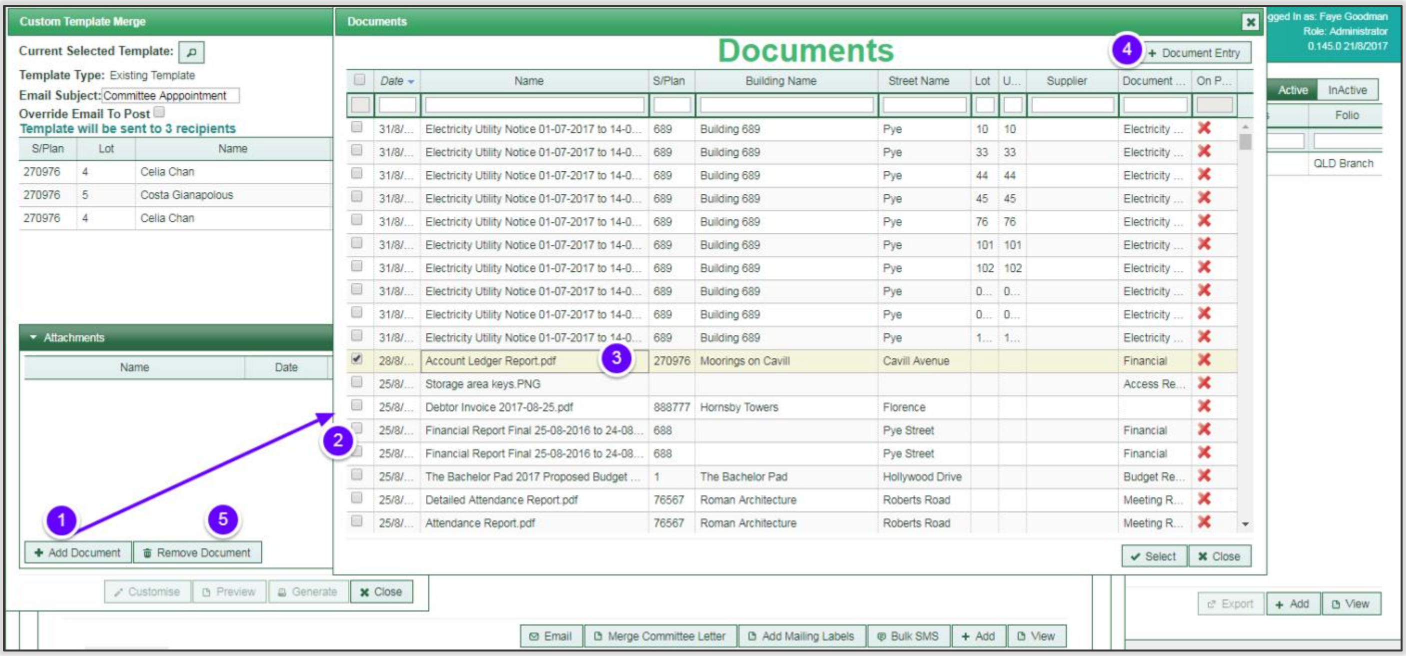
MAIL MERGING TO COMMITTEE MEMBERS

1. Click *Merge Committee Letter* to get started
2. Click on the search icon to find the template you want to merge to
3. Committee members with email selected as their delivery method will be emailed – Enter an email subject line here
4. Tick here if you want to override committee member delivery methods and create a PDF that you can print and post for all the selected committee members.
5. The name of each recipient shows here, and their delivery method
6. Click on the attachments accordion to open it
7. Click here to add a document
8. Click close to exit the mail merge process



Adding a document to the Mail Merge

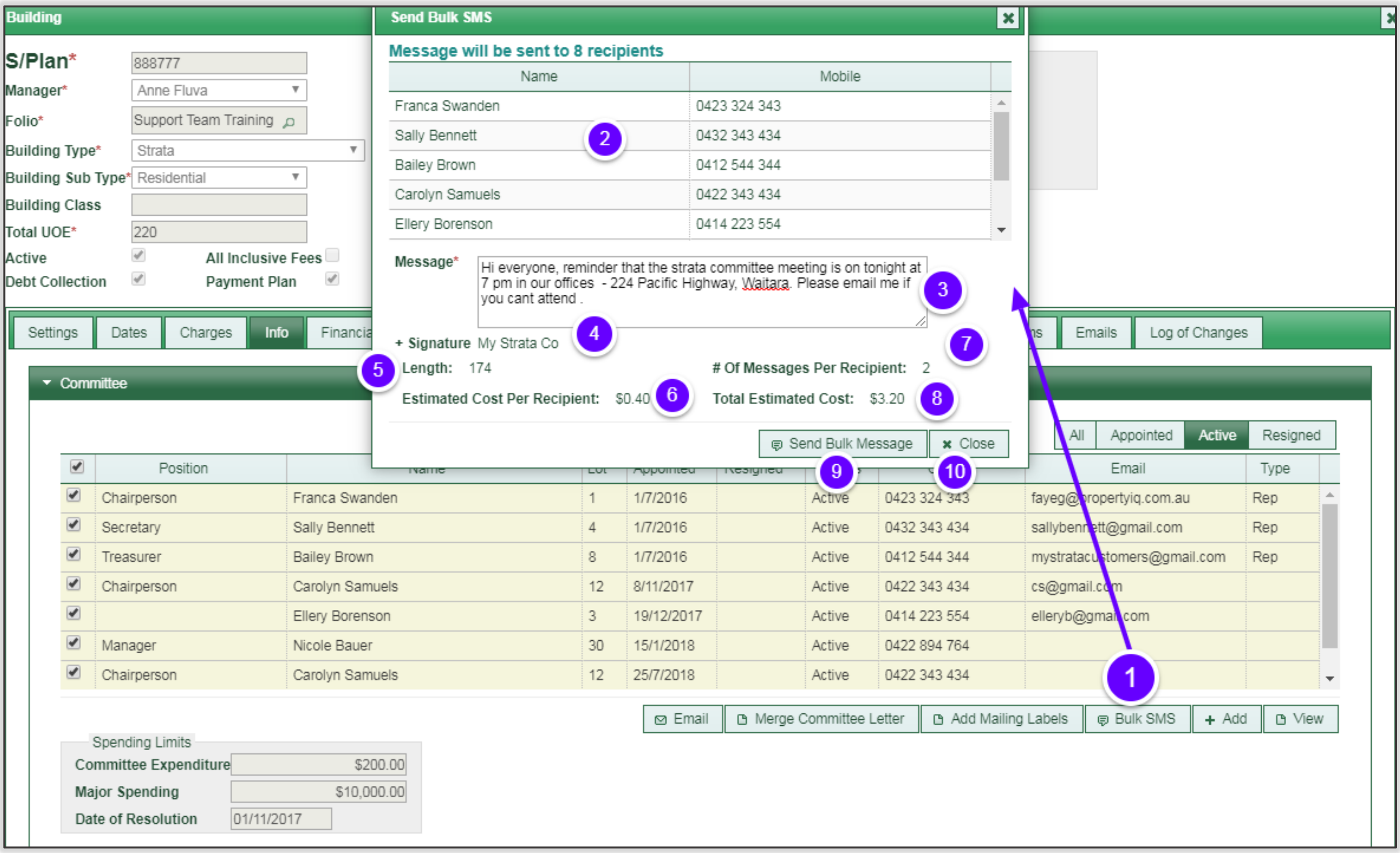
1. Click on *Add Documents*
2. The documents show on the screen
3. Click on the document, to highlight it, and then double click to select it
4. Click on the *Document Entry* button to add a document that is on your computer, but not saved in PropertyIQ. This will also add the document to the building's document card
5. You can also remove a document that you have previously added, by clicking on the *Remove Document* button



SENDING A BULK SMS TO COMMITTEE MEMBERS

If you subscribe to the SMS service, you can bulk SMS Committee members

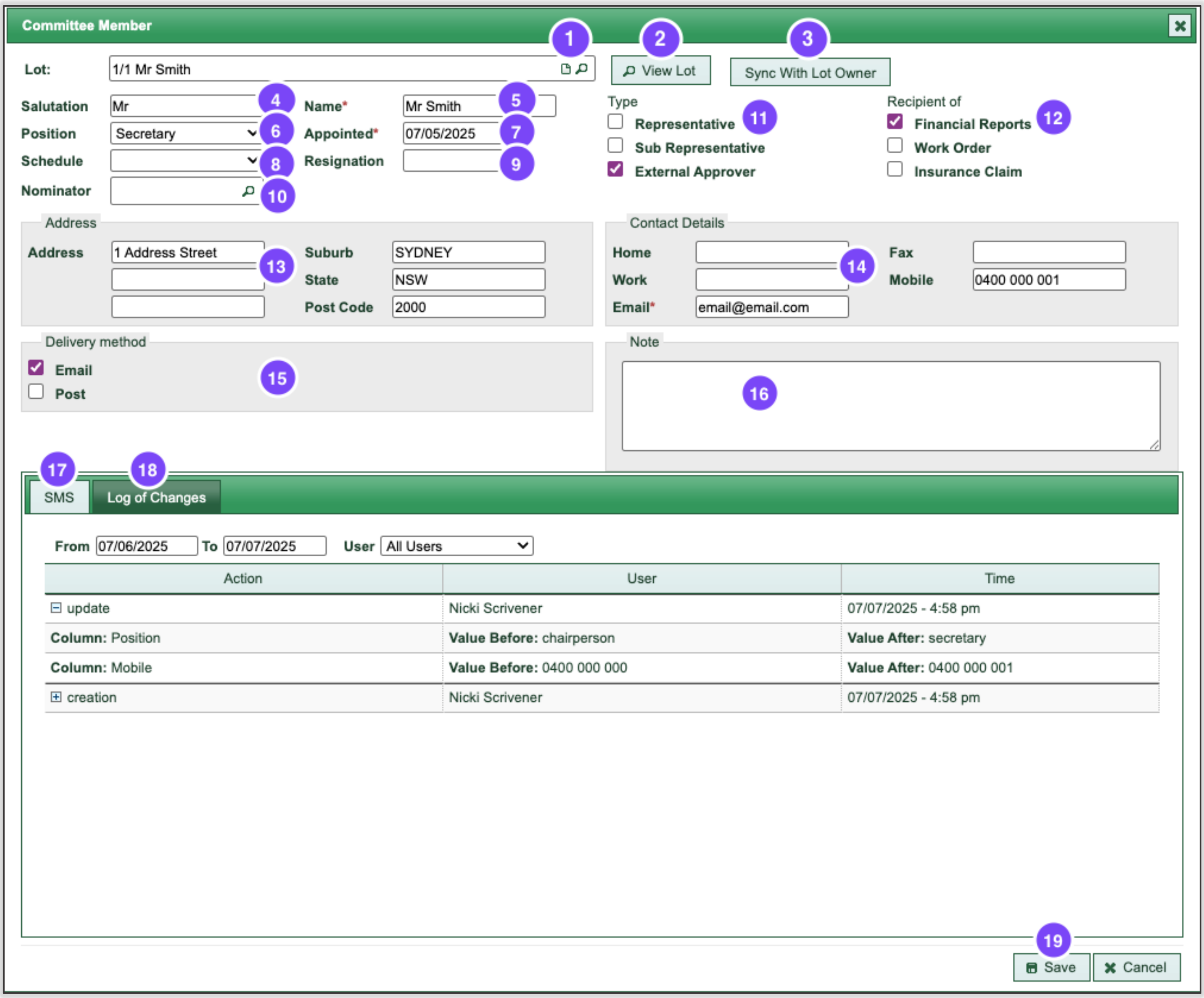
1. Select the committee members you want to SMS and click on the *Bulk SMS* button
2. The recipients and their mobile numbers show here
3. Enter your message here.
4. Your standard signature is set up in the settings menu - SMS tab. For more detail, see the manual "SMS"
5. The character count shows here
6. The estimated cost per message shows here. Messages are charged in 160 character blocks. If your message is up to 160 characters, it will count as one message for billing purposes, if more than 160 it will count as two and so on.
7. The number of messages per recipient shows here. As this message is more than 160 characters, two messages per recipient will be charged.
8. The total estimated cost of the bulk message shows here
9. Click *Send Bulk Message* when you are ready to send. The SMS will be recorded on each committee member's card
10. Click *Close* to exit the bulk SMS



ADDING & EDITING COMMITTEE MEMBERS

To add a new committee/council member, click the *+Add* button from the Committee screen.

If the committee/council member is not a lot owner, you can skip Steps 1-3 below and enter their details directly onto the committee/council member's card.



1. Use the search icon to find and select a lot owner if the committee/council member is a lot owner.
   If the committee/council member is linked to a lot, you can also click the page icon to open the lot card.
2. If the committee member is linked to a lot, you can view the lot here.
3. **IMPORTANT!** If you select *Sync with lot owner* the information here comes from the lot card; changes and updates to the lot owner card will automatically update the committee member card.
4. Enter a salutation for any correspondence.
5. The committee member's name shows here.
6. Select their position from the dropdown list.
7. Enter the date this person was appointed.
8. If this is a multi-OC building and this member is a member for a single-OC, select the schedule.
9. If the person resigns from the committee, enter the date of their resignation here. Once a date is entered, the member will be marked as 'inactive'.
10. Enter the nominator of the member (if applicable).
11. Select the type of member where applicable:
    a. Select if they are a representative of the lot
    b. Select if they are a sub-representative of the lot

   c. Select if they have authority to approve supplier payments that need committee/council approval. If this is ticked, when you are processing supplier transactions and you select that the invoice requires external approval, they will automatically be sent an invoice approval request.

12. Select if committee/council member receives copies of documents where applicable:
   a. Select if they receive a copy of financial reports when generating in bulk from the Reporting menu
   b. Select if they receive a copy of work orders when you send them to suppliers
   c. Select if they receive a copy of insurance claims when you send them to insurers.

13. If you don't sync with the lot card, you can update any of the address details for this person here.

14. If you don't sync with the lot card, you can update any of the contact details for this person here.

15. Tick their preferred delivery method for committee related correspondence. The options are email or post.

16. You can record notes here that relate to the person's committee/council member role.

17. *[Visible once created and for existing members]* If you are using the SMS function, you can click here to SMS the committee member. Any SMS you have sent will also be recorded here.

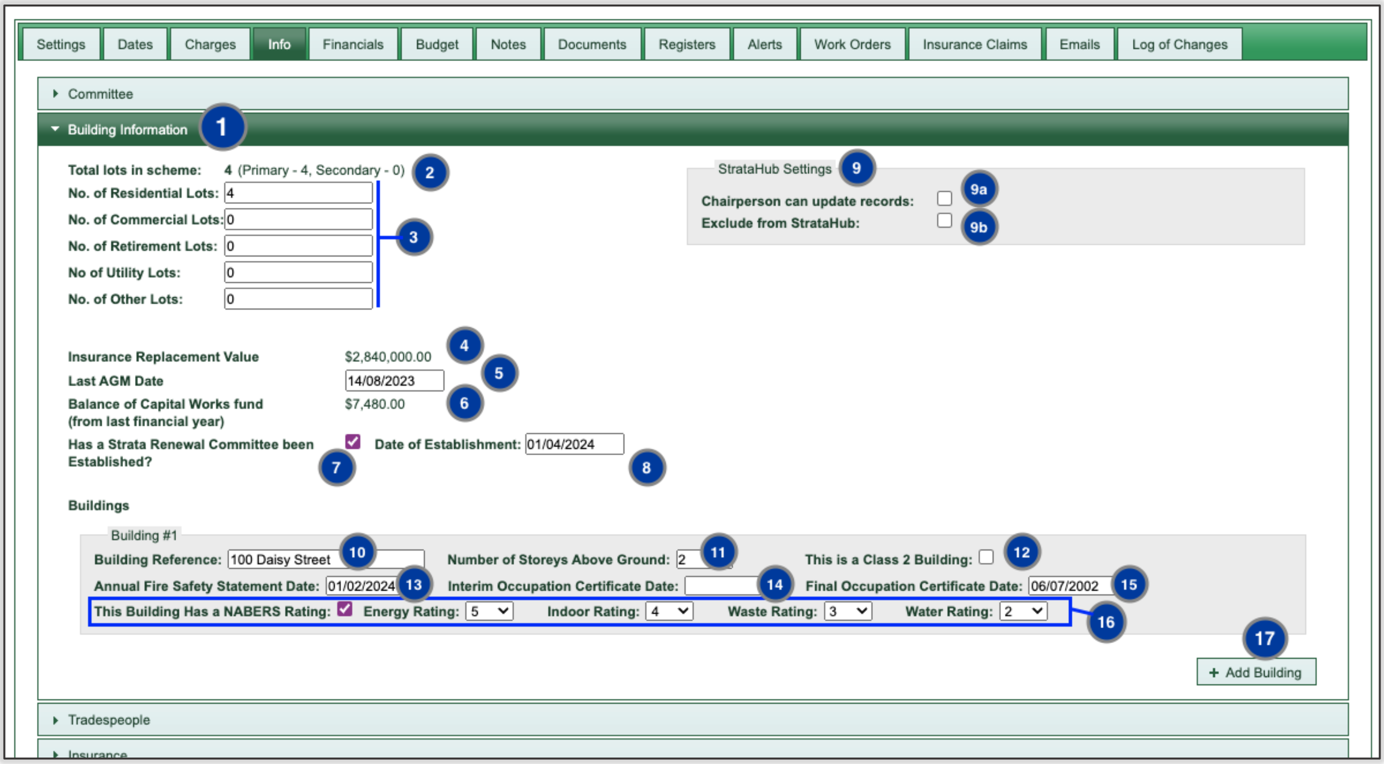
18. *[Visible once created and for existing members]* The creation and any changes to the committee/council member will be recorded under the Log of Changes tab here.

19. Click *Save* when done.

BUILDING INFORMATION

You can record important building information under *Building>Info tab>Building Information* accordion. Any changes to this screen will be reflected in the building's Log of Changes tab.

<u>NSW StrataHub</u>: Capture the building information required for StrataHub reporting, including information for multiple building structures reported under the scheme (strata plan).



1. Click on *Building Information* accordion to open it.
2. Here you'll see the total number of lots in the building (same as building lot count).
3. In this section you can record the breakdown of lots depending on use e.g. number of lots that are residential, commercial, etc.
4. View the building's insurance replacement value here.
   a. Read only field. Calculated based on the sum insured amounts for all **active** insurance policies of the building, where coverage type is **Building/Common Area**.
5. View the last AGM date of the building here.
   a. This is a shared field with 'Last AGM Date' under the buildings Dates tab. If there's a date in 'Last AGM Date' field under Dates tab, it will be pre-populated here. If you update one, it automatically updates the other.
6. View the balance of the Capital Works/Sinking/Maintenance/Reserve Fund as at last financial year.
   a. Read only field. Calculated based on the sum of Capital/Sinking balances of all bank accounts as at the last day of the building's previous financial year. If no previous financial years, the opening balance date will be used for calculations.
7. Here you select if a Strata renewal committee has been established (relevant for **NSW buildings**).
8. Here you can enter the establishment date if a Strata renewal committee was established. This date field is only visible if you've ticked the strata renewal committee option.

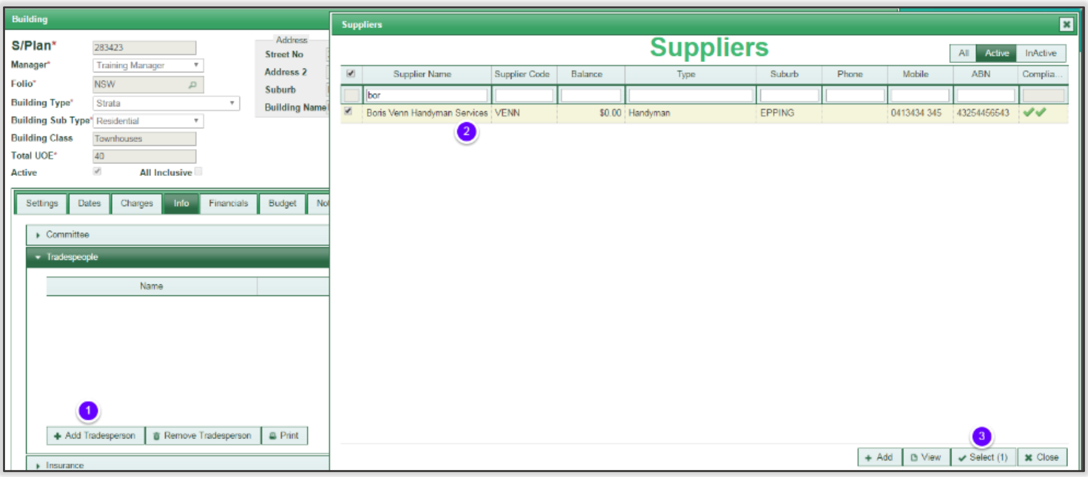
9. StrataHub Settings are only visible for **NSW buildings** AND when the NSW StrataHub Integration setting has been enabled. If you aren't seeing these settings and should be, contact us at support@propertyiq.com.au.
    a. Here you can select if the Chairperson can update StrataHub records.
    b. Here you can select if you want to exclude this building from StrataHub reporting.
10. Here you can enter the Building Reference.
    a. The default value for Building #1 is [Street Number]+[Street Name], separated by a space.
    b. There's a maximum of 100 characters and it cannot contain invalid special characters.
    c. For **NSW buildings**, the reference is mandatory and must be unique across all sub-buildings within the same building – see Step 16 for adding sub-buildings.
11. Here you can select if it's a Class 2 building (Only visible for **NSW buildings**).
12. Here you can enter the number of storeys above ground. This field is mandatory if 'Class 2 building' is ticked.
13. Here you can enter the Annual Fire Safety Statement date.
14. Here you can enter the Interim Occupation Certificate date.
15. Here you can enter the Final Occupation Certificate date.
16. Here you can select if the building has a NABERS rating and enter the ratings where applicable.
    a. There are individual NABERS ratings for Energy, Indoor, Waste and Water.
    b. When 'Has NABERS rating' is ticked, the individual ratings are mandatory. Rating options are 0-6 in 0.5 increments.
17. Multi-buildings – For multiple building structures reported under the scheme (strata plan), you can add the additional sub-buildings and capture the above information for each sub-building. To add more sub-buildings, click the *+Add Building* button.

TRADESPEOPLE

You can record the building's preferred tradespeople here.

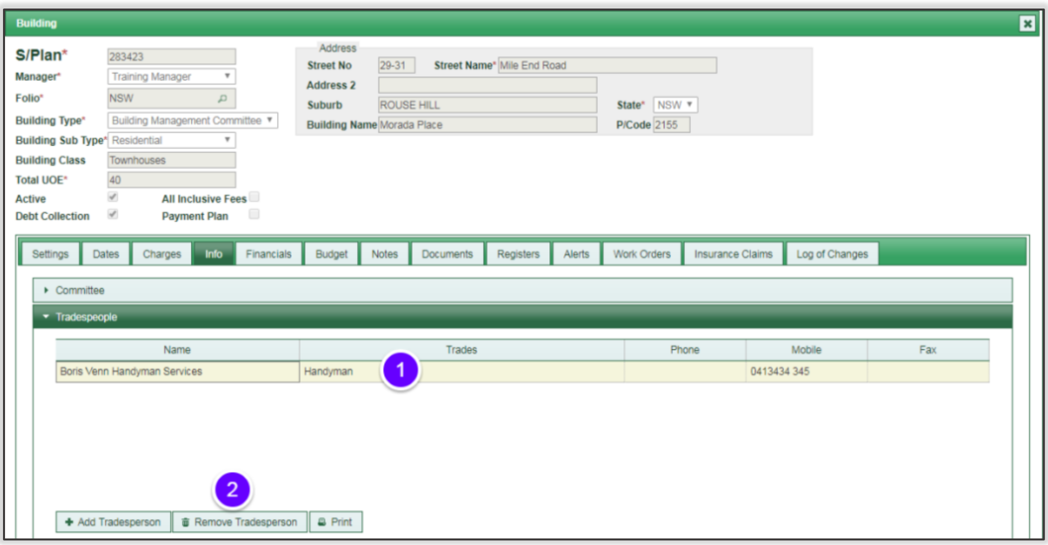
NOTE You will still be able to select any tradespeople you want when creating a work order, as this area is just for your information.

1. Make sure you are *not* in edit mode on the building card and click here to get started
2. Enter some key letters to search for the tradesperson you want
3. *Select* to add them



You can remove a preferred tradesperson

1. Highlight the tradesperson you want to remove
2. Click *Remove Tradesperson* to remove them from the list. This will not remove their supplier record from PropertyIQ.

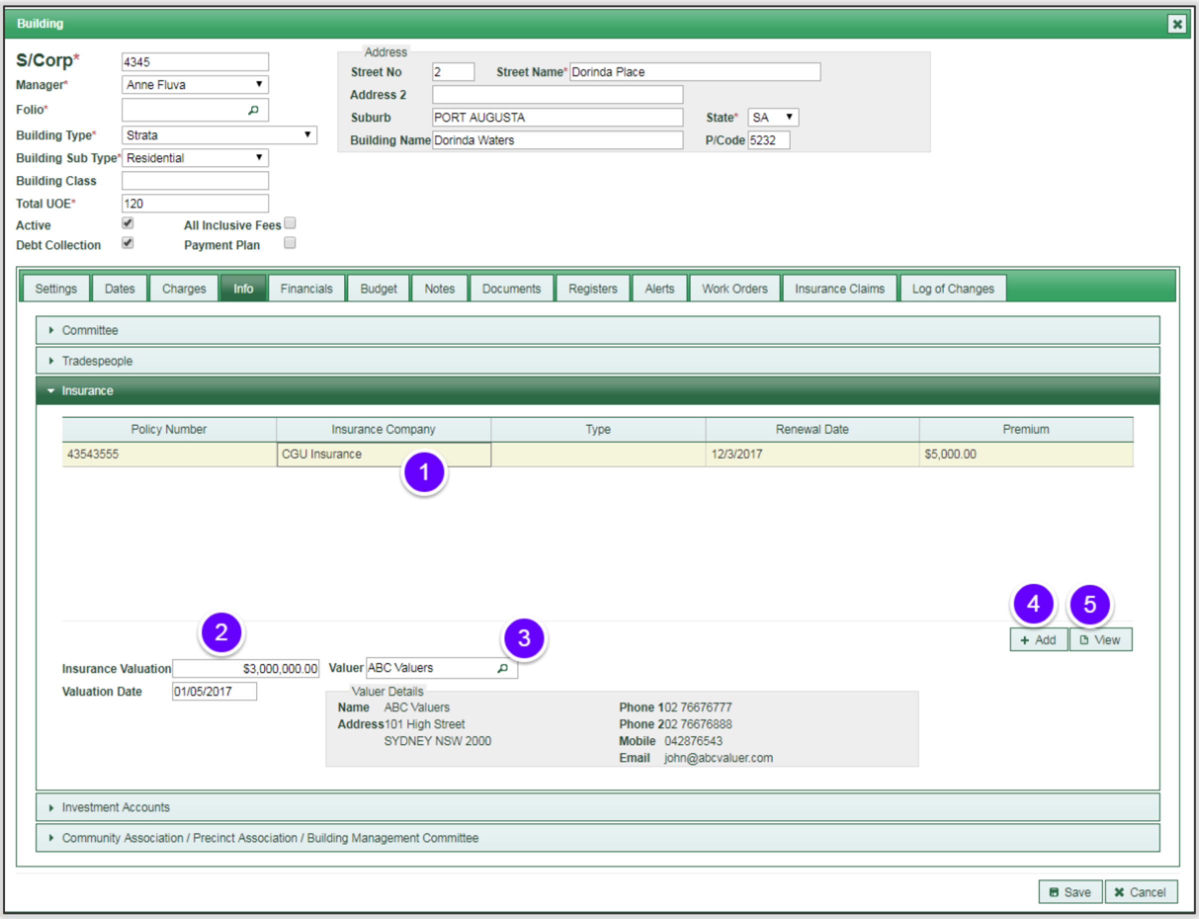


You can print a list of all preferred tradespeople for the building by clicking on the *Print* button.

INSURANCE

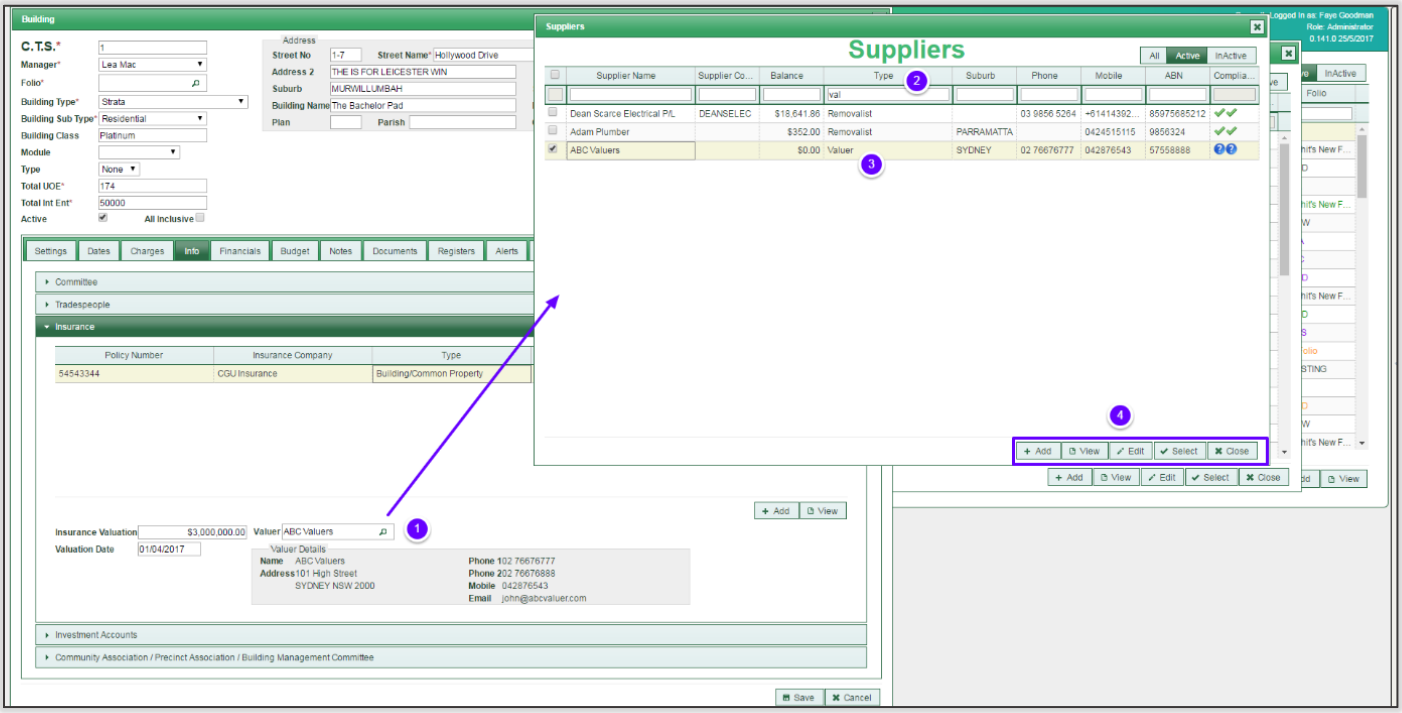
You can record all insurance policies relating to the building here.   Recording your insurance policies here creates entries in your diary so you won't miss any policies expiring. This information is also utilised when you process an insurance claim. For full details about insurance claims, see the manual "Insurance Claims"

1. Any existing insurance policies will show here. Click on the policy to highlight it, and then double click to open it
2. You can enter the latest insurance valuation amount and the date of the latest Insurance Valuation here
3. You can add insurance valuer suppliers here - click on the search icon to search for a supplier.
4. *+Add* button to add a new insurance policy or
5. *View* button to view an insurance policy that you have already highlighted on the screen



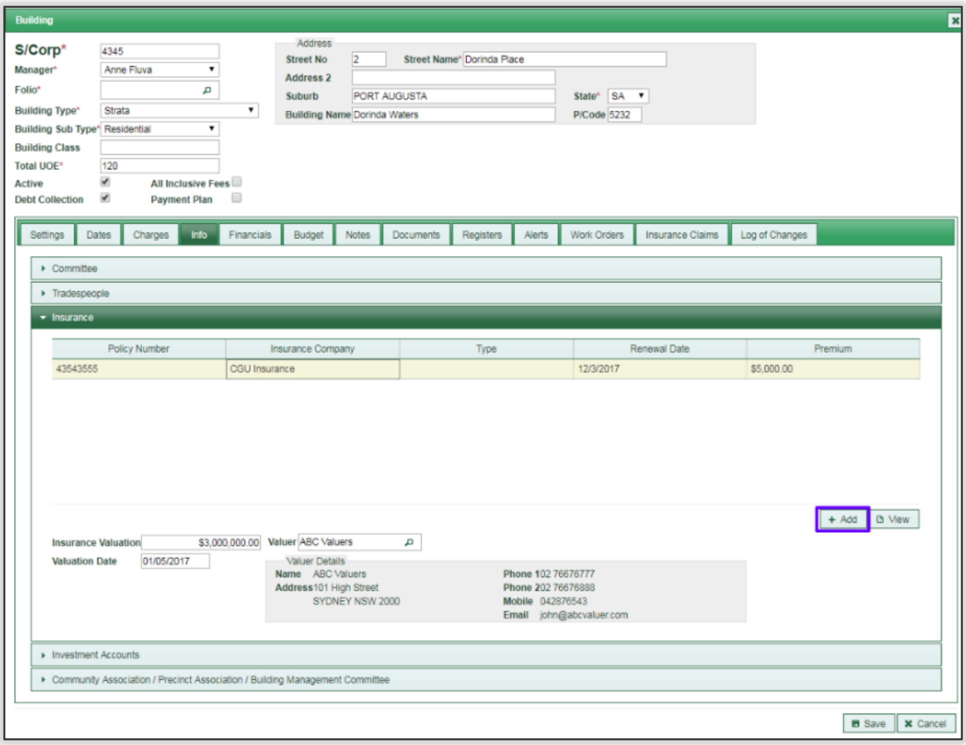
ADDING AN INSURANCE VALUER

1. Use the search icon to search for a supplier
2. Enter some key letters in any of the empty boxes on the top line to refine your search
3. Click on the supplier you want to highlight them and then double click to select
4. You can also add, view, edit and select suppliers here. For full details, see the Manual "Suppliers Screen"



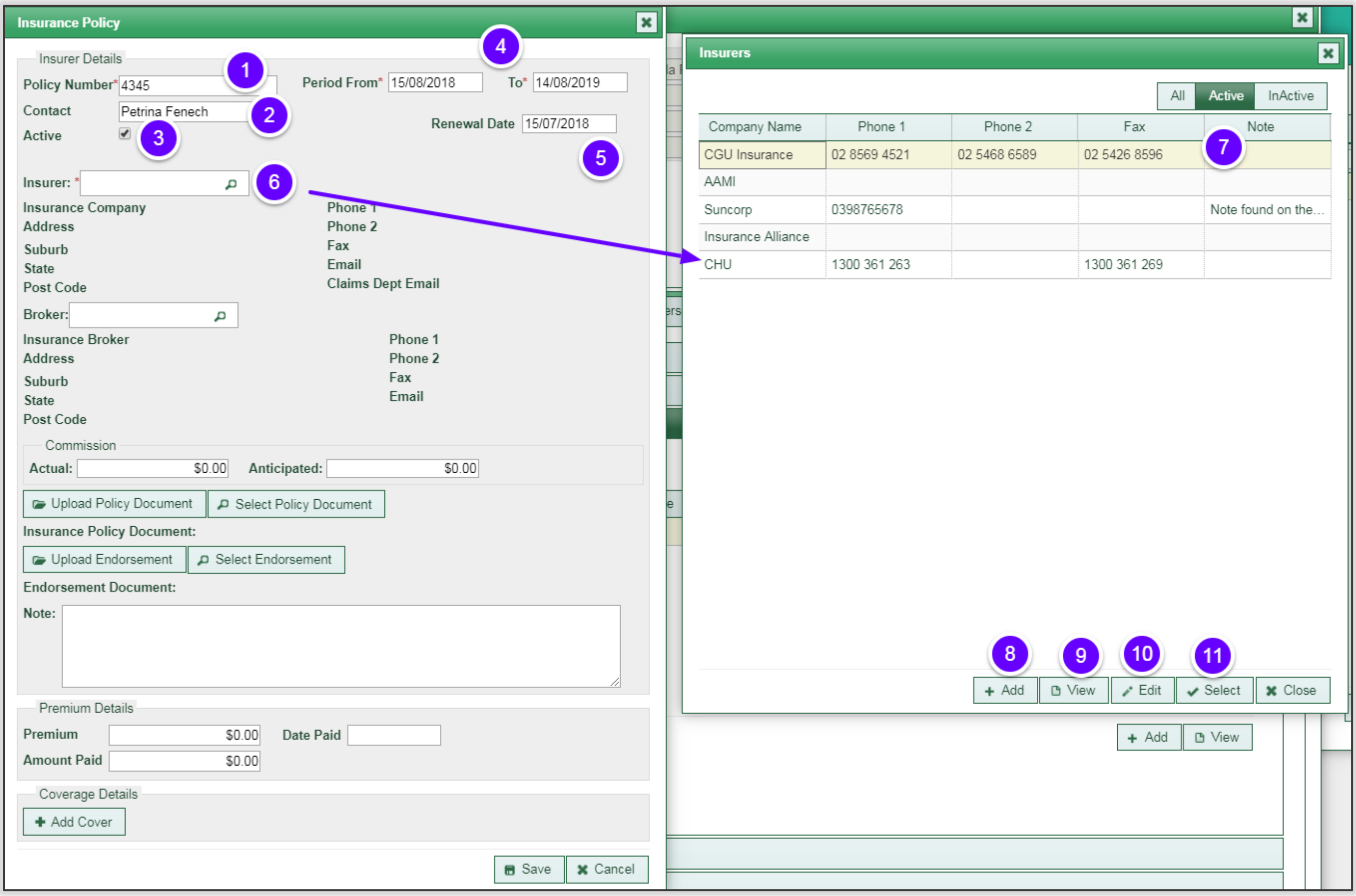
ADDING AN INSURANCE POLICY

+Add to get started



1. Enter the policy number here
2. If you have an insurance company contact, enter their name here
3. Enter the start date and end dates of the policy here
4. Enter the date you want to manage the renewal here – enter this well ahead of the actual expiry as this creates a diary reminder for the strata manager and gives you time to ensure the policy doesn't expire
5. The policy is active by default, but you can inactivate it if you need to
6. Use the search icon to search for an insurer.
7. Click on an insurer name to highlight them then double click to select them
8. *+Add* button to add a new Insurer.
9. Once you have highlighted an Insurer on the screen, *View* to view their details
10. Once you have highlighted an Insurer on the screen, *Edit* to edit their details
11. Click on an insurer name and then *Select* to attach that insurer to the policy

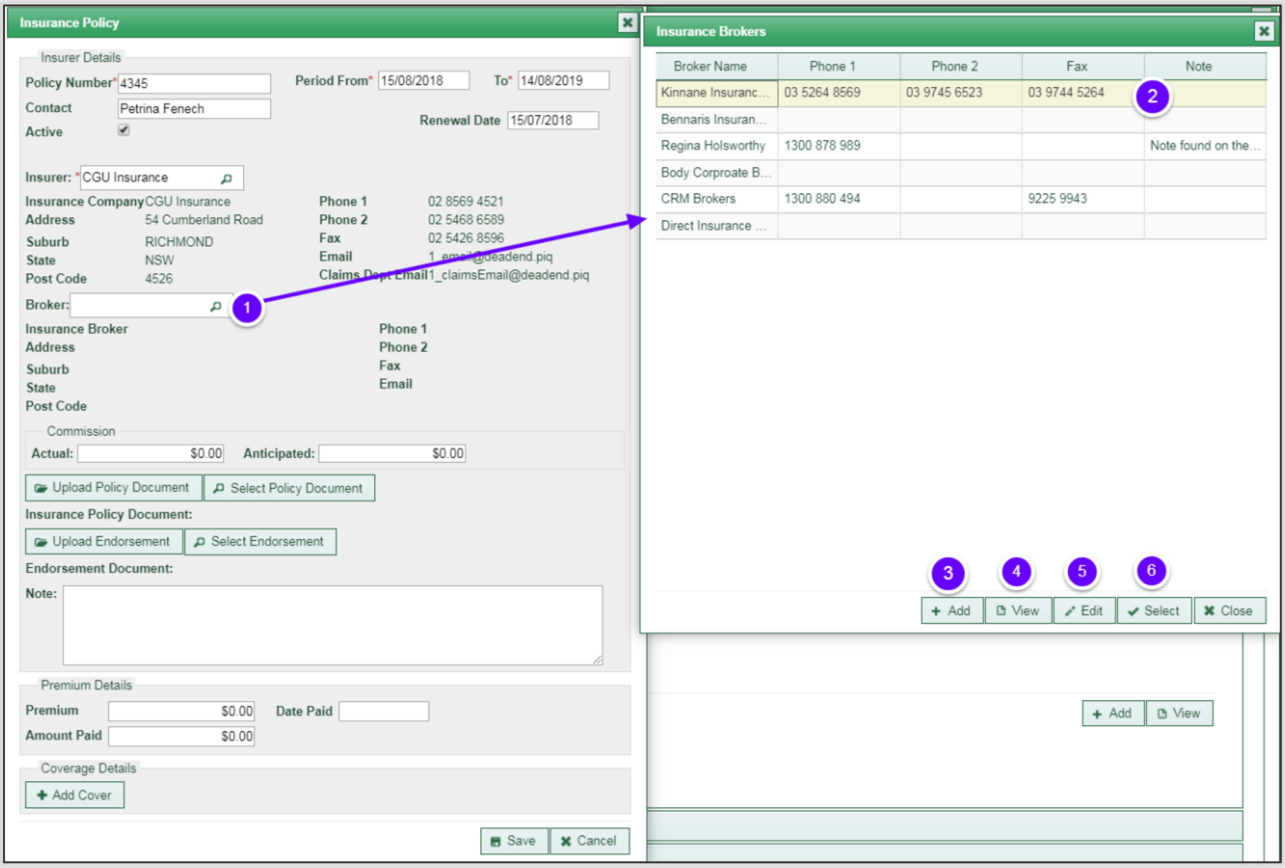
NOTE When adding an insurer, make sure you enter an email address in the claims email section so insurance claims can be emailed to them.



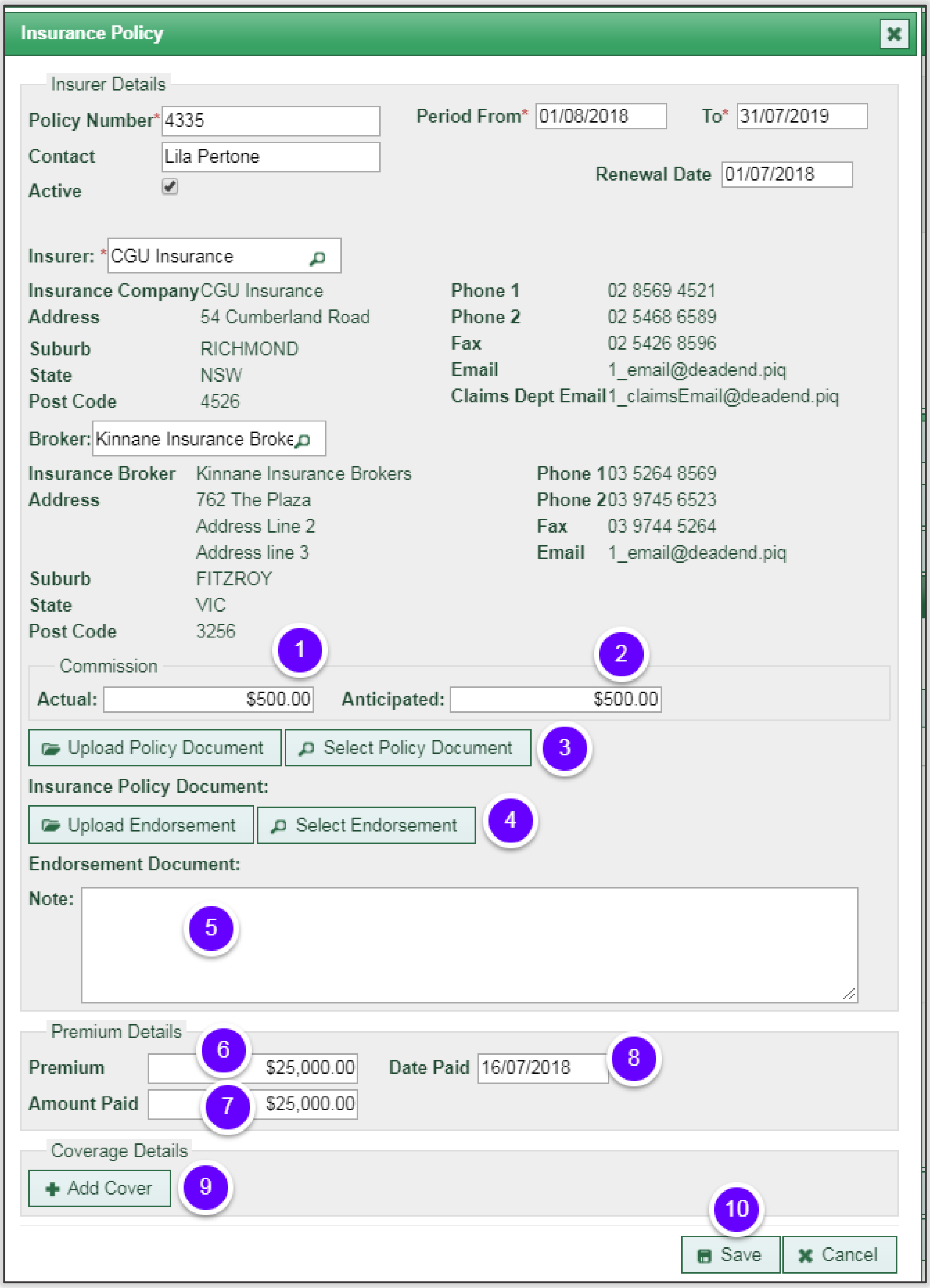
BROKERS

Complete this section if you are using a broker.

1. Use the search icon to open the brokers list. This will show all existing brokers
2. Click to highlight a broker and click *View* to view that broker's details (or double click on the highlighted broker)
3. +*Add* to add a new broker
4. *View* to open and view an existing broker's details
5. *Edit* to edit the details of a broker
6. Click to highlight a broker and *Select* to add them to the insurance policy details (or double click on the highlighted broker)

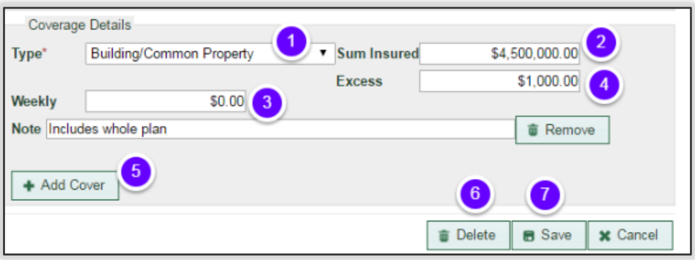


1. Enter your actual insurance commission here.
2. Enter your anticipated commission here.
3. Click here to upload a new policy document. See section below – uploading insurance documents
4. Click here to attach a document to this policy that is already in PropertyIQ. See section below – uploading insurance documents
5. Click here to upload a new Insurance endorsement document/policy alteration document. See section below – uploading insurance documents
6. Click here to attach an endorsement document to this policy that you have already attached to PropertyIQ. See section below – uploading insurance documents
7. Enter the amount of the premium shown on the insurance policy documents here
8. Enter the date the premium was paid here
9. Enter the actual amount of premium paid here e.g. if you are paying in monthly instalments you can enter the amounts here.
10. *Add Cover* to add details of cover


Insurance Policy
Insurer Details
Policy Number* 4335
Period From* 01/08/2018
To* 31/07/2019
Contact Lila Pertone
Active
Renewal Date 01/07/2018
Insurer: * CGU Insurance
Insurance Company CGU Insurance
Address 54 Cumberland Road
Suburb RICHMOND
State NSW
Post Code 4526
Phone 1 02 8569 4521
Phone 2 02 5468 6589
Fax 02 5426 8596
Email 1_email@deadend.piq
Claims Dept Email 1_claimsEmail@deadend.piq
Broker: Kinnane Insurance Broke
Insurance Broker Kinnane Insurance Brokers
Address 762 The Plaza
Address Line 2
Address line 3
Suburb FITZROY
State VIC
Post Code 3256
Phone 1 03 5264 8569
Phone 2 03 9745 6523
Fax 03 9744 5264
Email 1_email@deadend.piq
Commission
Actual: $500.00
Anticipated: $500.00
1
2
Upload Policy Document
Select Policy Document
3
Insurance Policy Document:
Upload Endorsement
Select Endorsement
4
Endorsement Document:
Note:
5
Premium Details
Premium $25,000.00
Amount Paid $25,000.00
Date Paid 16/07/2018
6
7
8
Coverage Details
Add Cover
9
10
Save
Cancel

ADDING INSURANCE COVER

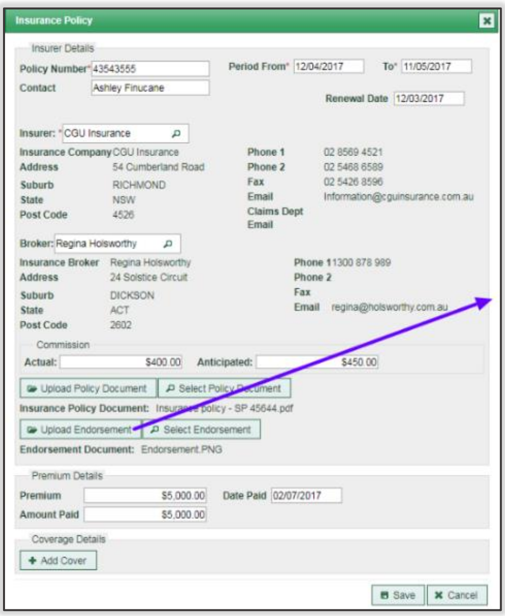
1. Choose the type of cover from the dropdown list
2. Enter the sum insured
3. Enter the amount of weekly premium payable (if paid weekly)
4. Enter the amount of excess payable if you make a claim
5. Enter any additional notes here
6. You can delete the cover here (This does not delete the whole policy, just this area of cover)
7. *Save*

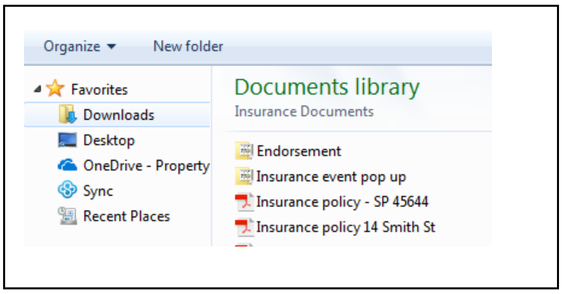


You will not be able to process an insurance claim on a policy unless it has Building/Common property cover attached to it.

UPLOADING INSURANCE DOCUMENTS

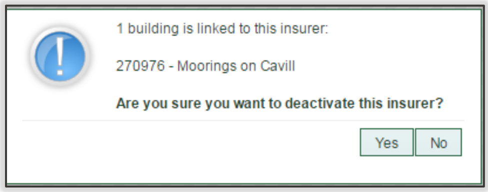
Click on *upload policy documents* or *upload endorsement* to attach a document that is saved on your computer but not yet uploaded into PropertyIQ. If you have already added the policy document or endorsement document to PropertyIQ, you can click *select policy document* to search for it.



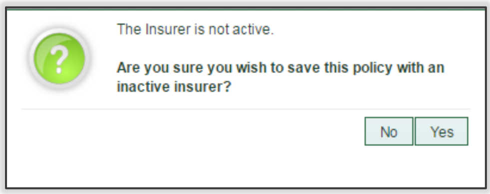


NOTE ABOUT INACTIVE INSURERS

You can inactivate insurers, but to prevent you from activating insurers that are already attached to an insurance policy, you will receive this warning if you try to inactivate an insurer that is attached to any policies.



If you edit and then try to save an Insurance policy that is attached to an inactive insurer, you will receive the following warning:

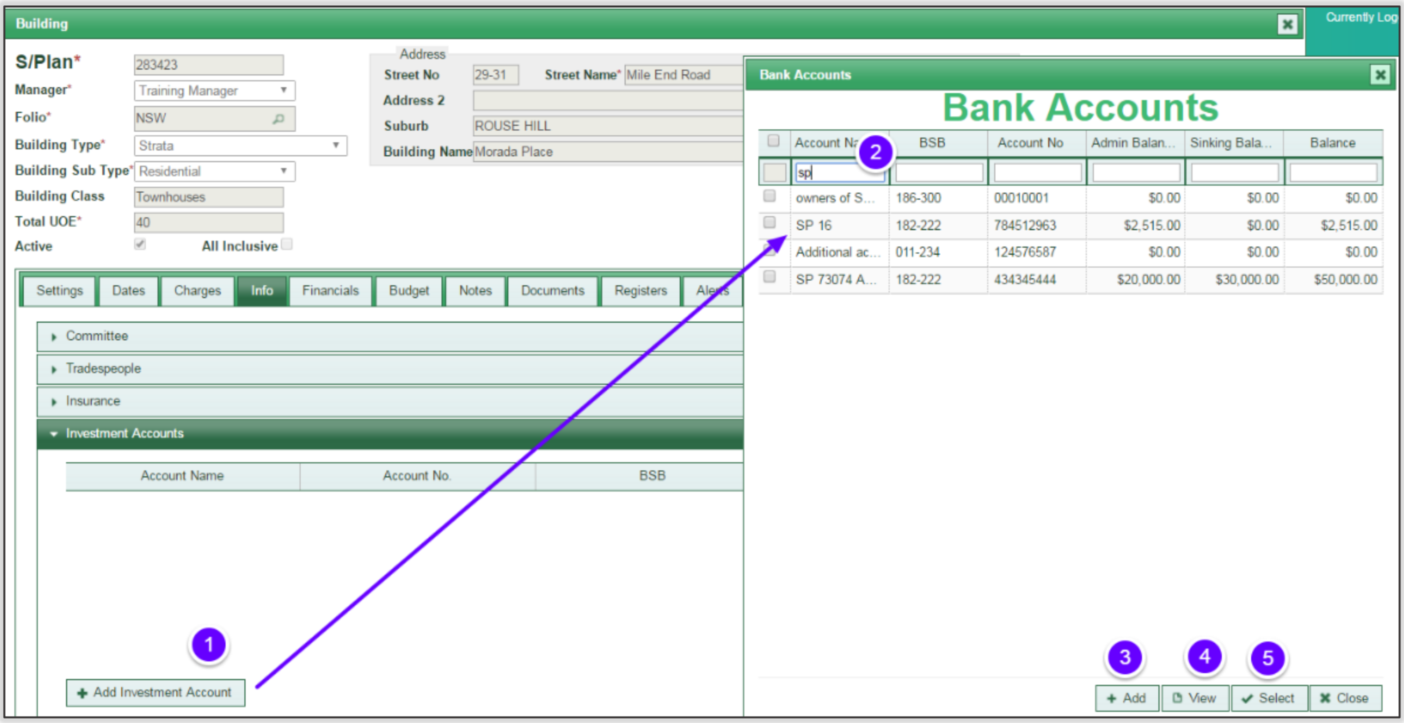


INVESTMENT ACCOUNTS

Some buildings have separate investment bank accounts, where they transfer some of the funds they don't need for immediate use to earn interest.

Click on *+Add Investment Account* to get started

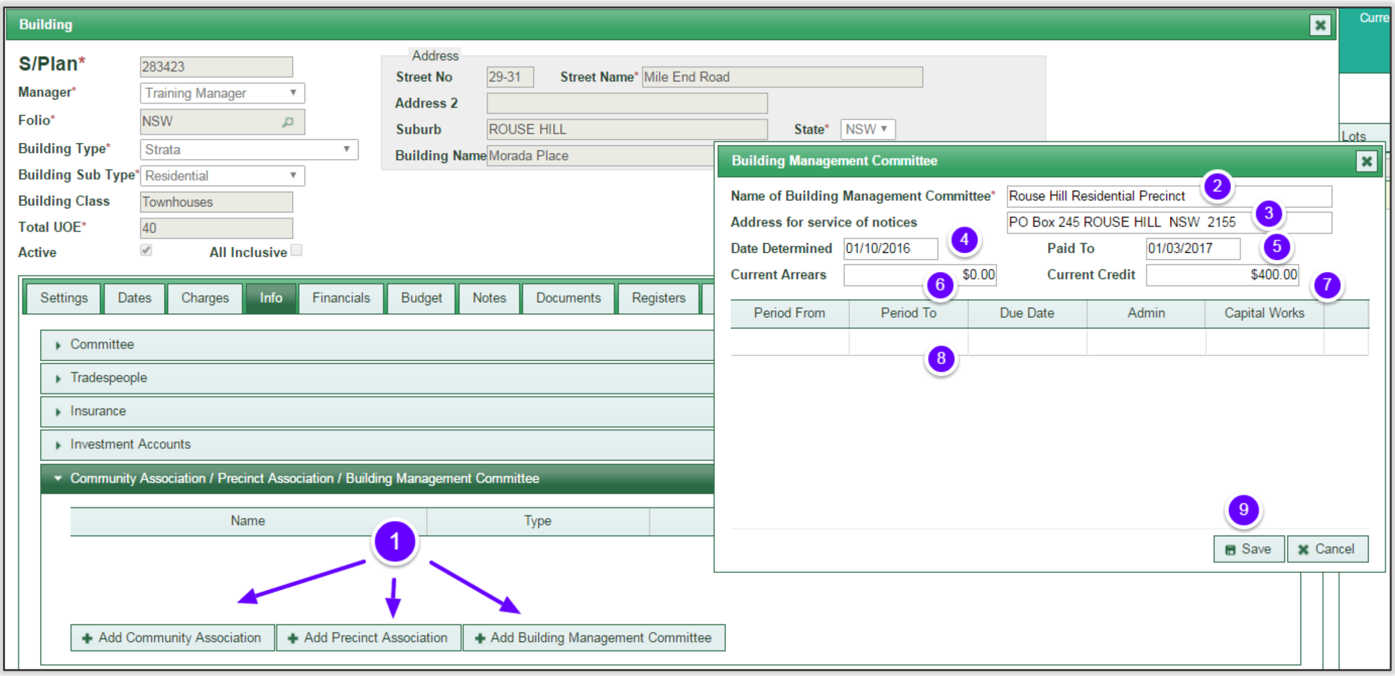
1. *+Add Investment Account*
2. To search for an existing investment account, enter some key letters here to refine your search
3. *+Add* to add a new investment account. The permission to add or edit bank accounts is usually restricted to the roles of Administrator and Accounts, but roles may be customised in your company.
4. To view or edit the details of an account, highlight the bank account you are looking for and click *View*
5. To select a bank account, highlight the account you want and then click *Select* (or double click on the account you want to select)

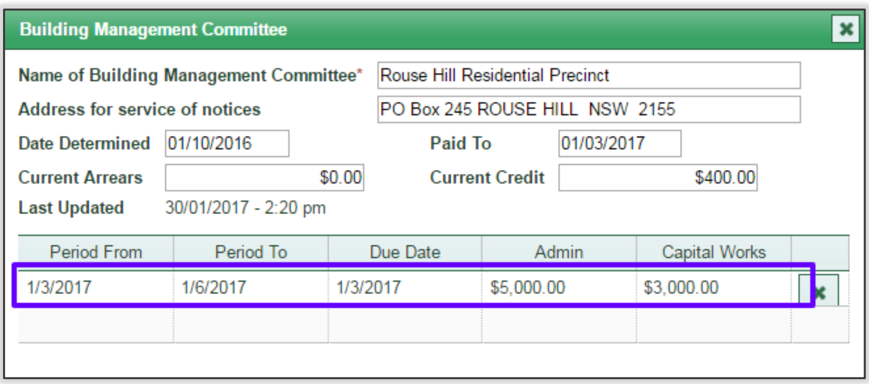


COMMUNITY ASSOCIATIONS, PRECINCT ASSOCIATIONS AND BUILDING MANAGEMENT COMMITTEES

These are the organisations that sit above an individual strata scheme (and usually incorporate a number of strata schemes.) The information entered here merges onto an information certificate. The building you manage may have to pay levies to these organisations for items that affect the whole of the precinct, for example swimming pool expenses for a pool that services a number of strata plans.

1. Select the type of association/committee you want to enter
2. Enter the name of the association/committee
3. Enter the address of the association/committee
4. Enter the date the association/committee levies were determined
5. Enter the date levies due to the association/committee are paid to
6. Enter the amount of any arrears owed to the association/committee
7. Enter any amounts that have been paid in credit (advance) to the association/committee
8. You can enter the details of any levies due here
9. *Save*





RELATED BUILDINGS

On the Building card>Info tab, the '*Related Buildings'* accordion allows you to link related buildings to each other and also record buildings that are managed by another strata/OC management company. For example, 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 in PIQ 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.
- Record one or more related buildings managed by another Strata/OC management company
    - Manually enter any other related building/s that are managed by another manager, including the manager's details for record purposes.
- 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.

Permissions

- 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.

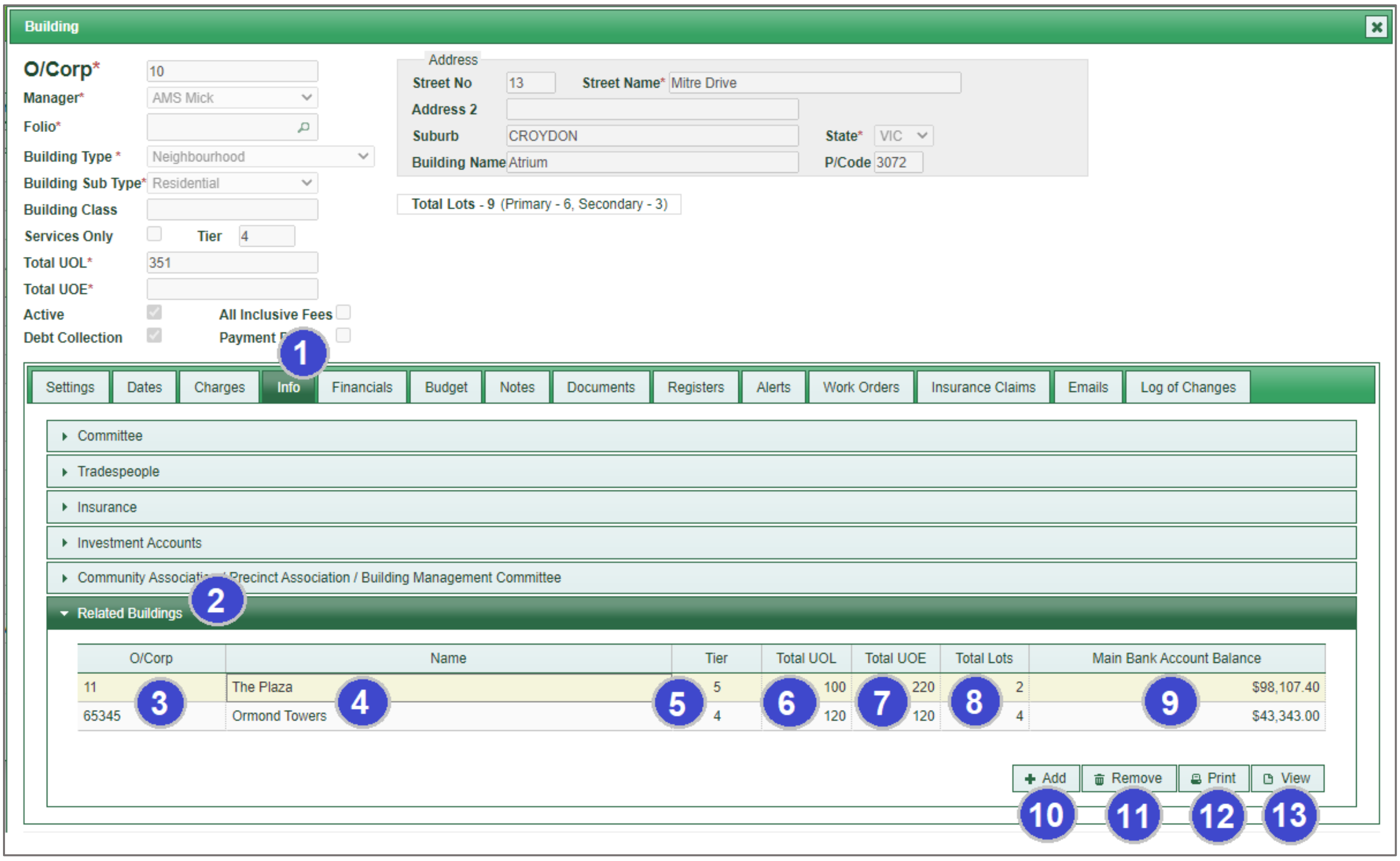
You can refer to the below instructions for more detail.

1. View related buildings accordion
2. Link a related building (for buildings that are in PIQ)
3. Add other related building (for buildings that are not in PIQ)
4. Unlink a related building
5. Generate related buildings report

VIEW RELATED BUILDINGS ACCORDION

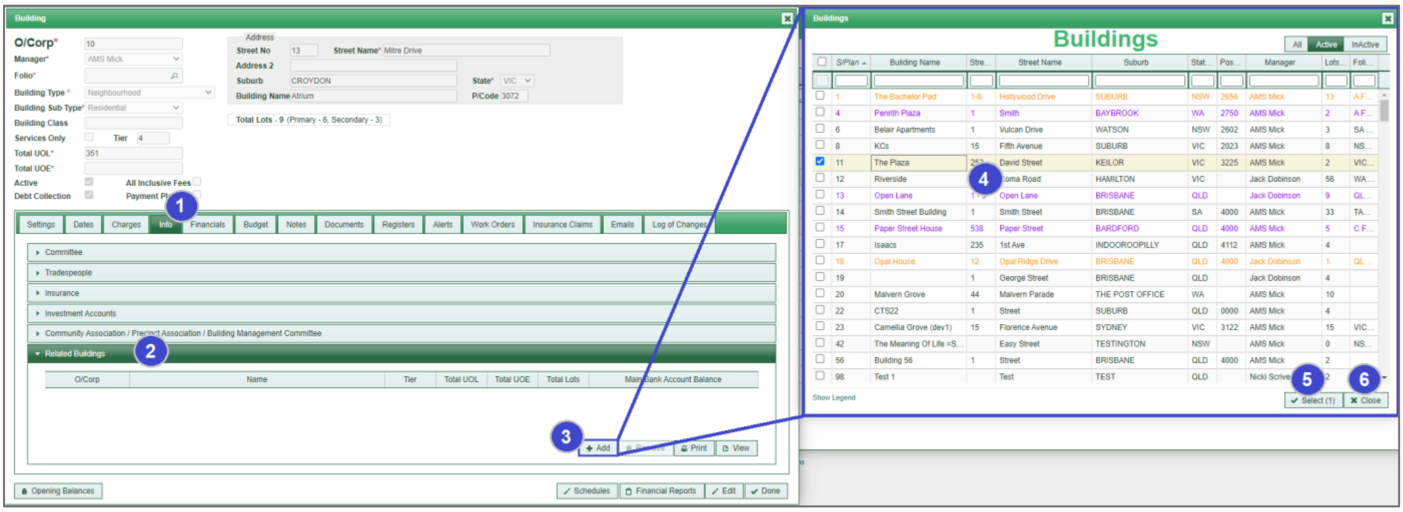
1. Go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. The SP/CTS/OC number of the building will show here.
4. The name of the building will show here.
5. *VIC buildings* - The Tier of the building will show here.
   All other states - This column will not be shown.
6. *VIC 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 that are in your PIQ (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 *Add Other* to manually add a building that's managed by another strata/OC management company (a building that is not in your PIQ). Refer instructions [Add Other Related Building]() for more detail.
12. Click *Remove* to unlink a building from a group of related buildings.
    Refer instructions [Unlink a Related Building]() for more detail.
13. Click *Print* to generate a related buildings report in a new browser tab.
    Refer instructions [Generate Related Buildings Report]() for more detail.
14. 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.

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



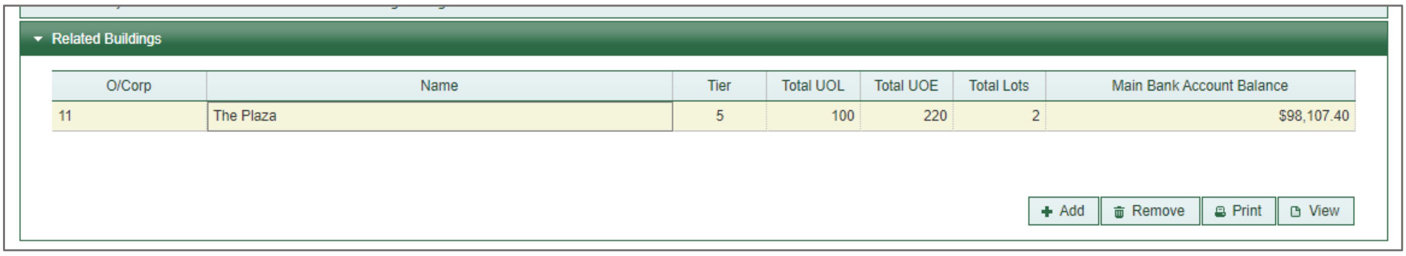
LINK A RELATED BUILDING

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.



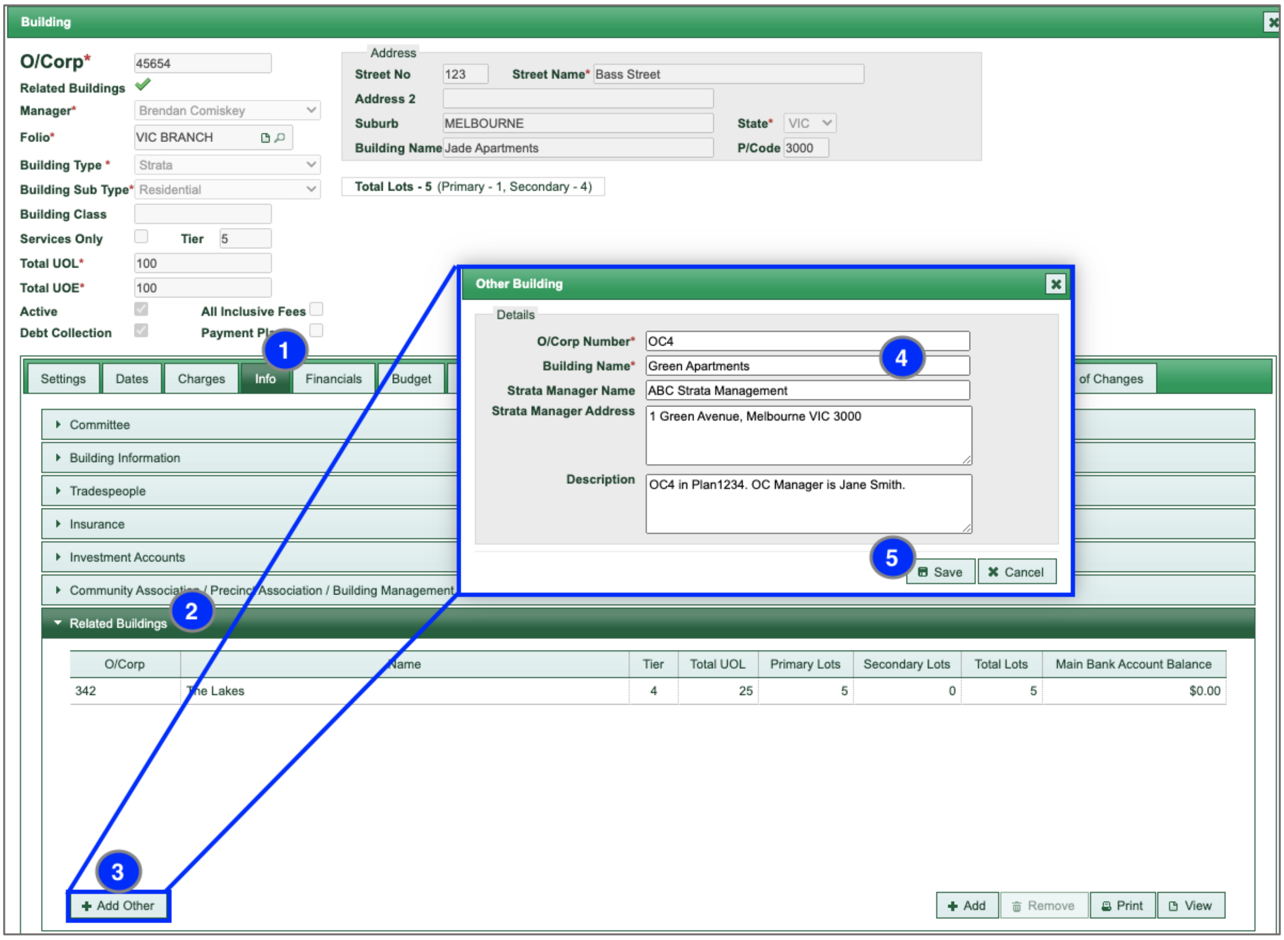
Once successfully added, the building will be shown in the grid.

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.

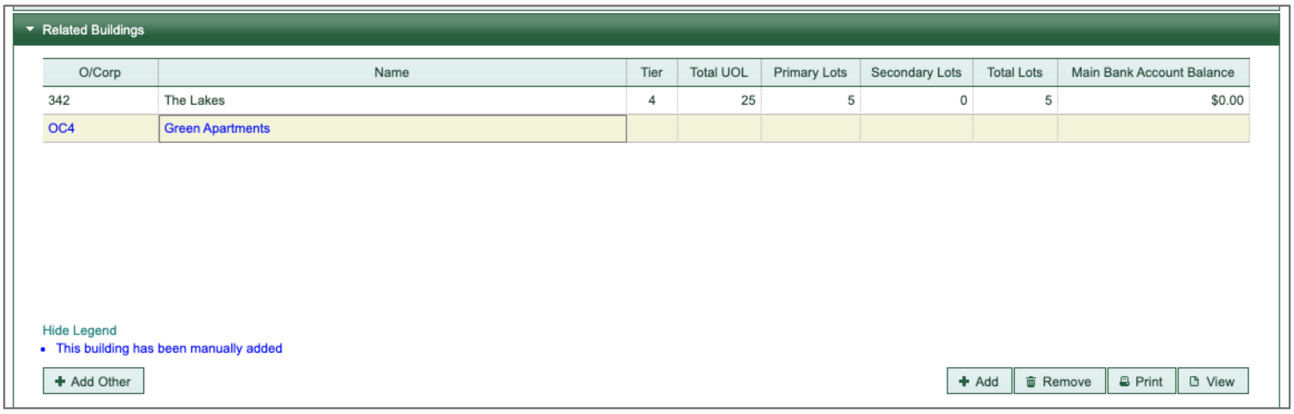


ADD OTHER RELATED BUILDING

1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. Click *Add Other* to add a building managed by another strata/OC management company (a building that is not in your PIQ). If the building is in your PIQ, link the building using the *+Add* button – refer instructions above.
4. Enter the details of the building and manager, and an optional internal description (the description wont be included in printed reports).
5. Click *Save* to add this building as a related building.



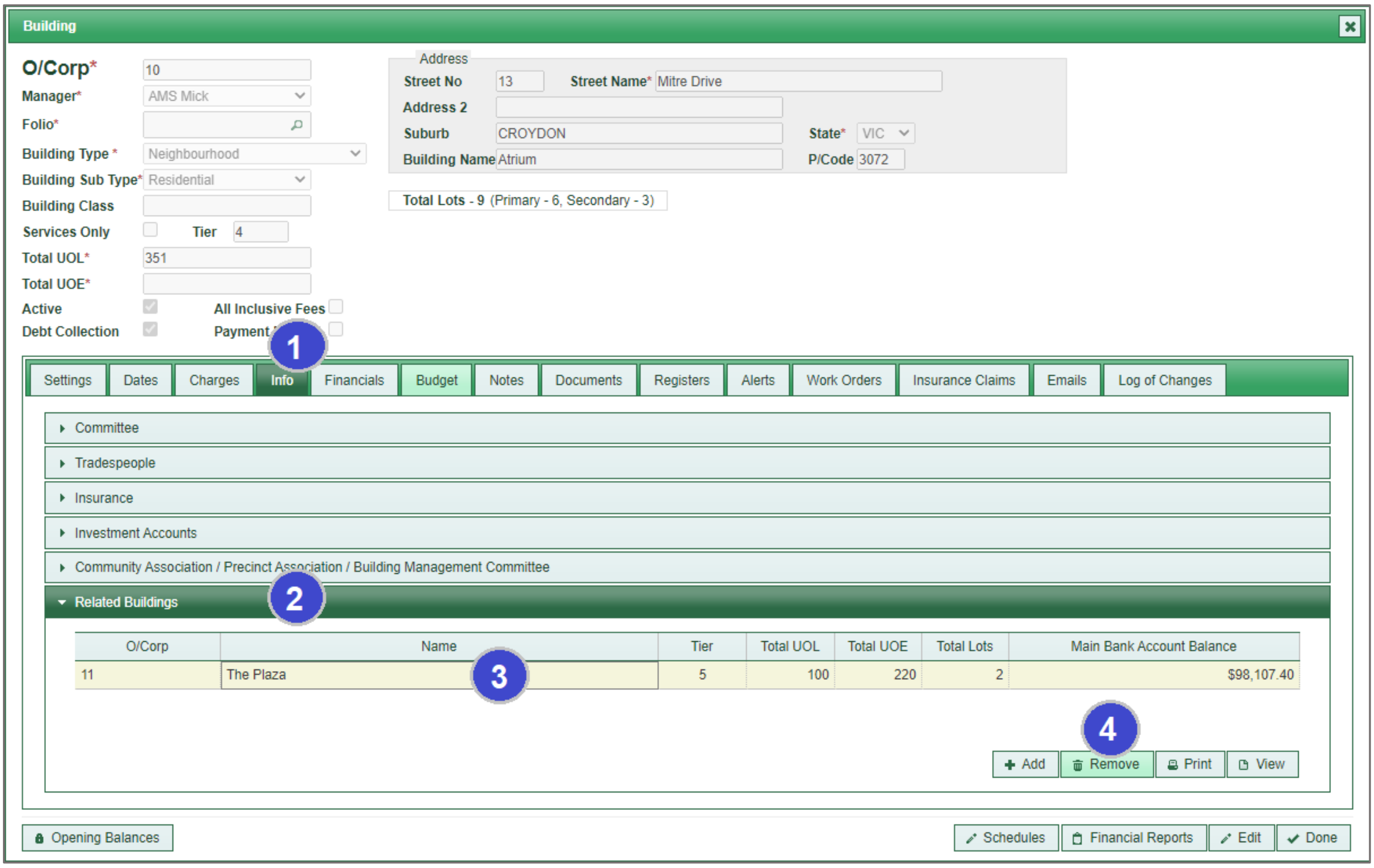
Once successfully added, the building will be shown in the grid in the colour **blue** to indicate that it's a manually added 'other' building.



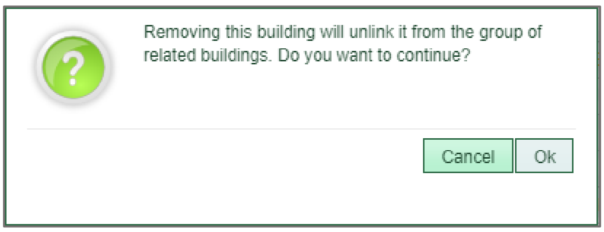
UNLINK A RELATED BUILDING

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 or remove 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.



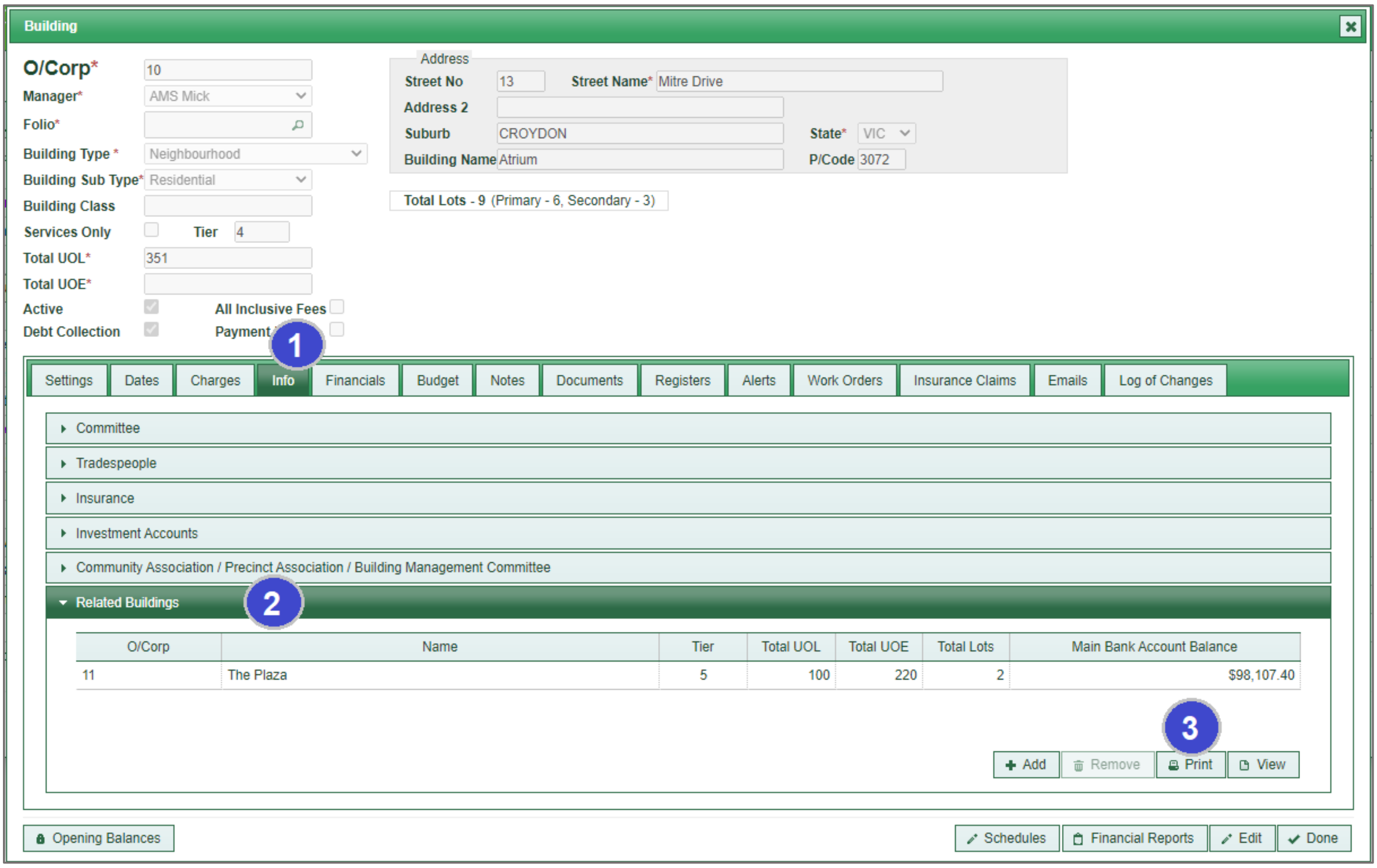
You'll see a popup that warns you that the building will be removed/unlinked from the group of related buildings. Press *OK* to proceed.



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

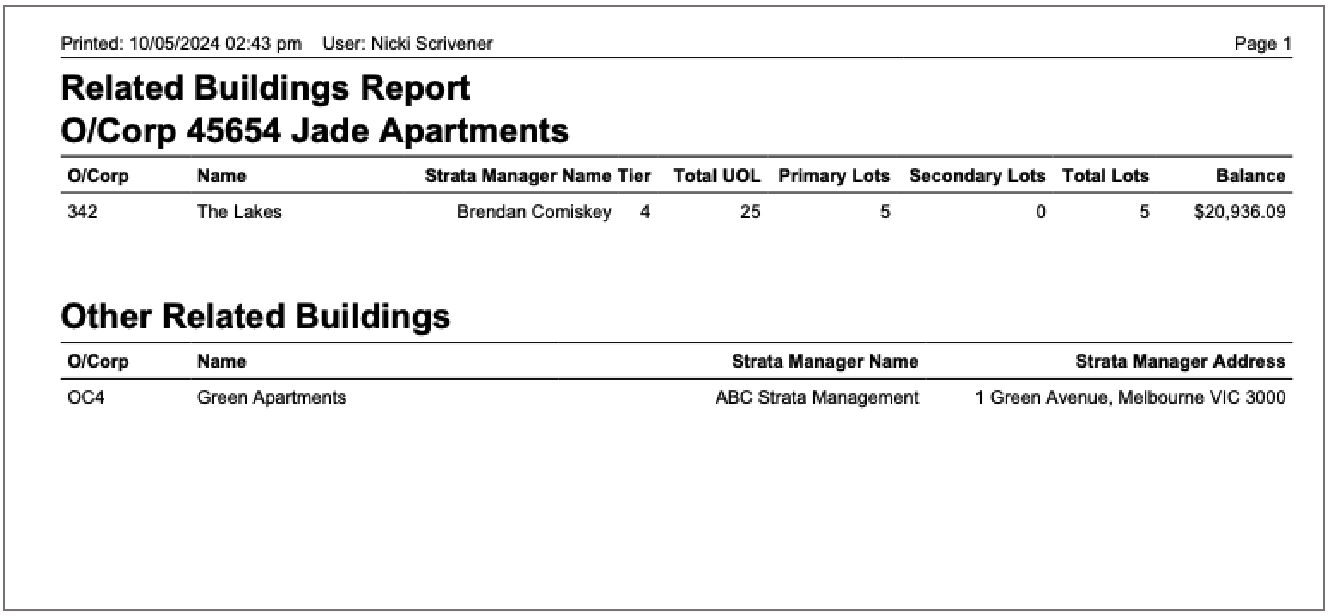
GENERATE RELATED BUILDINGS REPORT

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 report:

(Note that terminology and column types will change depending on the building's State)



Printed: 10/05/2024 02:43 pm User: Nicki Scrivener Page 1

Related Buildings Report
O/Corp 45654 Jade Apartments

O/Corp	Name	Strata Manager Name	Tier	Total UOL	Primary Lots	Secondary Lots	Total Lots	Balance
342	The Lakes	Brendan Comiskey	4	25	5	0	5	$20,936.09

Other Related Buildings

O/Corp	Name	Strata Manager Name	Strata Manager Address
OC4	Green Apartments	ABC Strata Management	1 Green Avenue, Melbourne VIC 3000

INFO CERTIFICATES

To improve efficiency and assist you in complying with your disclosure requirements, you can **record important information** on the building card and **set default attachments** for generated information certificates.

DETAILS TAB

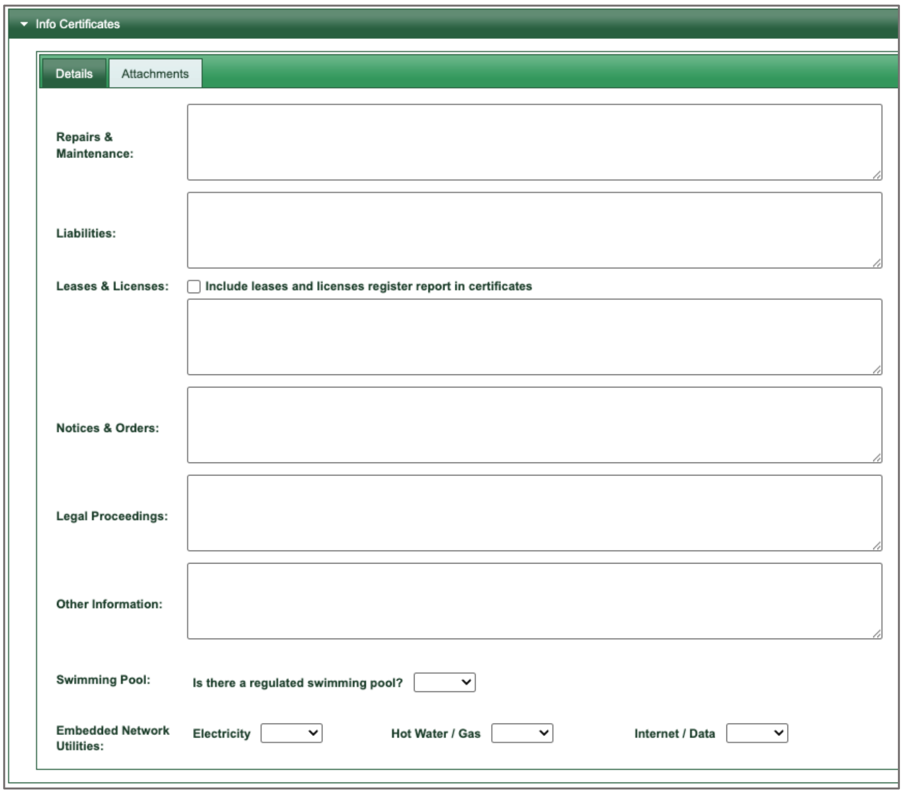
Under *Building card>Info tab>Info Certificate accordion>Details tab* you can record information that needs to be disclosed in information certificates. The data fields available on this screen will change depending on the building's State, as disclosure requirements vary State to State.

Each data field has a corresponding merge field that can be inserted into your certificate template/s and will allow this information to be pre-populated in each certificate generated.

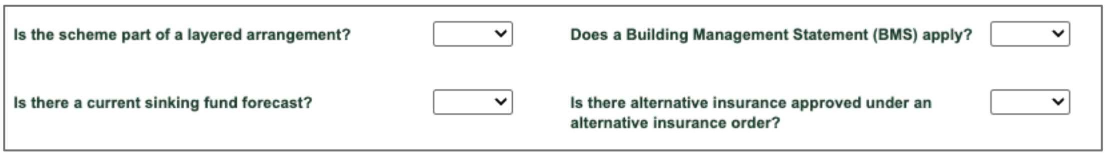
Corresponding merge fields available in certificate templates

- General text fields: {{&Building_Repairs}}, {{&Building_Liabilities}}, {{&Building_Leases_Licenses}}, {{&Building_Orders}}, {{&Building_Proceedings}} and {{&Building_Other_Info}}
- Swimming pool: {{Swimming_Pool}}
- Embedded network utilities: {{Embedded_Electricity}}, {{Embedded_Water}}, {{Embedded_Internet}}
- **(QLD)** Is the scheme part of a layered arrangement?: {{Layered_Arrangement}}
- **(QLD)** Is there a current sinking fund forecast?: {{Building_Management_Statement}}
- **(QLD)** Does a Building Management Statement (BMS) apply?: {{Sinking_Fund_Forecast}}
- **(QLD)** Is there alternative insurance approved under an alternative insurance order?: {{Insurance_Alternative}}
- **(ACT)** Ceiling insulation – Are all lots exempt from complying with minimum insulation standards?: {{Insulation_Exempt}}
- **(ACT)** Ceiling insulation – Lots that must comply (table of lots, whether lot has insulation and R-value): {{Insulation_Min_Standards}}
- **(ACT)** Ceiling insulation statement: {{&Ceiling_Insulation_Statement}}

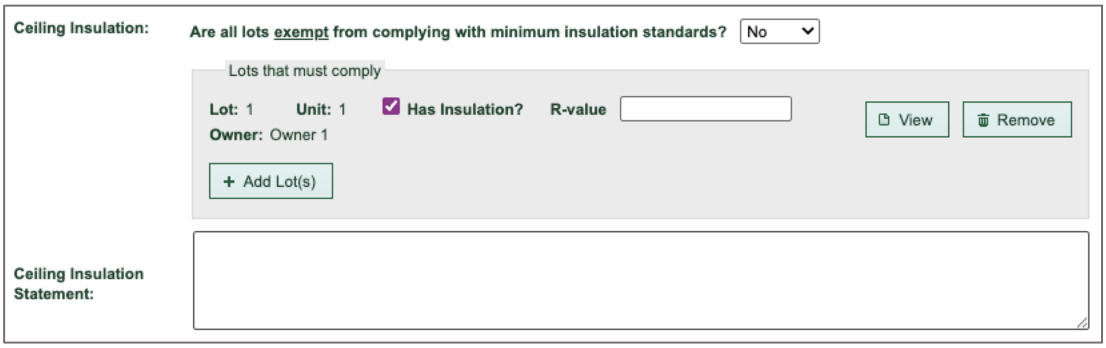
Data fields (All States)



QLD additional fields



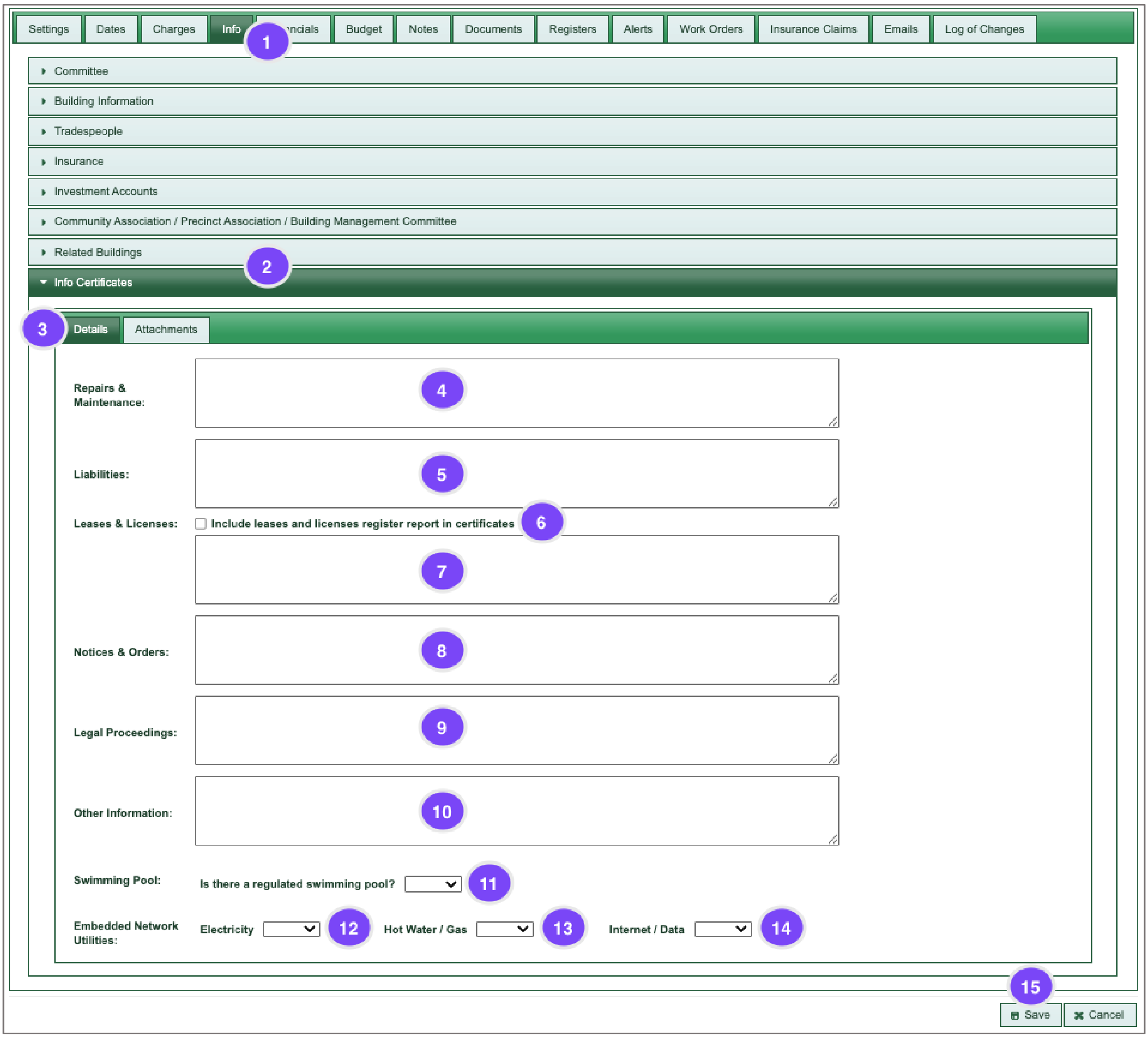
ACT additional fields



ADD DETAIL TO CERTIFICATE DATA FIELDS

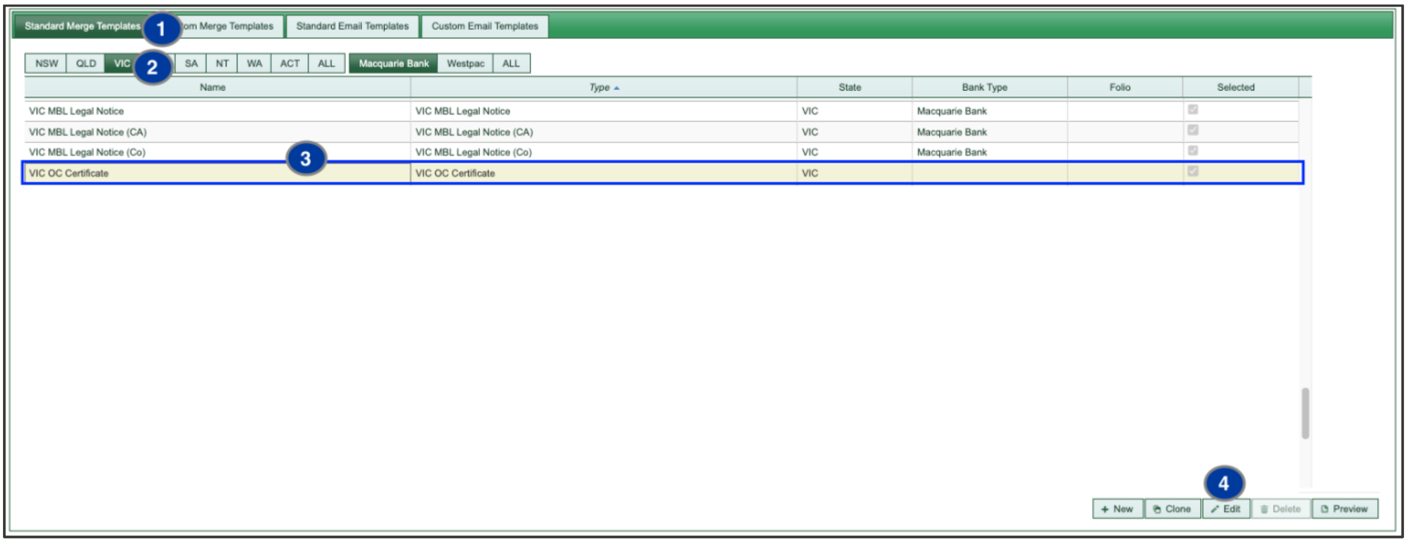
1. On the building card, go to the *Info* tab
2. Click on the *Info Certificates* accordion
3. Click on the *Details* tab
4. **Repairs and Maintenance** - Here you can record details of any repairs, maintenance or other work that has been or is about to be performed that may incur additional charges. Any information entered here will be shown in the merge field {{&Building_Repairs}} in the certificate template.
5. **Liabilities** - Here you can record details of any liabilities and contingent liabilities of the building. Any information entered here will be shown in the merge field {{&Building_Liabilities}} in the certificate template.
6. **Leases & Licenses** - Here you can record details of any leases and licenses over common property or a lot. Any information entered here will be shown in the merge field {{&Building_Leases_Licenses}} available in the certificate template.
7. **Leases & Licenses report when generating Certificate** – Here you can decide to include the leases and licenses register report by default when generating certificates. If you tick the checkbox, it'll be included when generating a certificate.
8. **Notices & Orders** - Here you can record details of any notices or orders served on the building in the last 12 months that haven't been satisfied. Any information entered here will be shown in the merge field {{&Building_Orders}} in the certificate template.
9. **Legal Proceedings** - Here you can record details of any legal proceedings to which the building is a party and any circumstances that are likely to give rise to proceedings. Any information entered here will be shown in the merge field {{&Building_Proceedings}} in the certificate template.
10. **Other Information** - Here you can record any other details or general information that may need to be disclosed by the buidling. Any information entered here will be shown in the merge field {{&Building_Other_Info}} in the certificate template.
11. **Swimming Pool** – Here you can record if the building has a regulated swimming pool. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field {{Swimming_Pool}} in the certificate template.
12. **Embedded Network Utilities - Electricity** – Here you can record if the building has an embedded electricity network. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field {{Embedded_Electricity}} in the certificate template.
13. **Embedded Network Utilities – Hot Water / Gas** – Here you can record if the building has an embedded hot water and/or gas network. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field {{Embedded_Water}} in the certificate template.

14. **Embedded Network Utilities – Internet / Data** – Here you can record if the building has an embedded internet or data network. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field {{Embedded_Internet}} in the certificate template.
15. Click *Save* to save your changes.

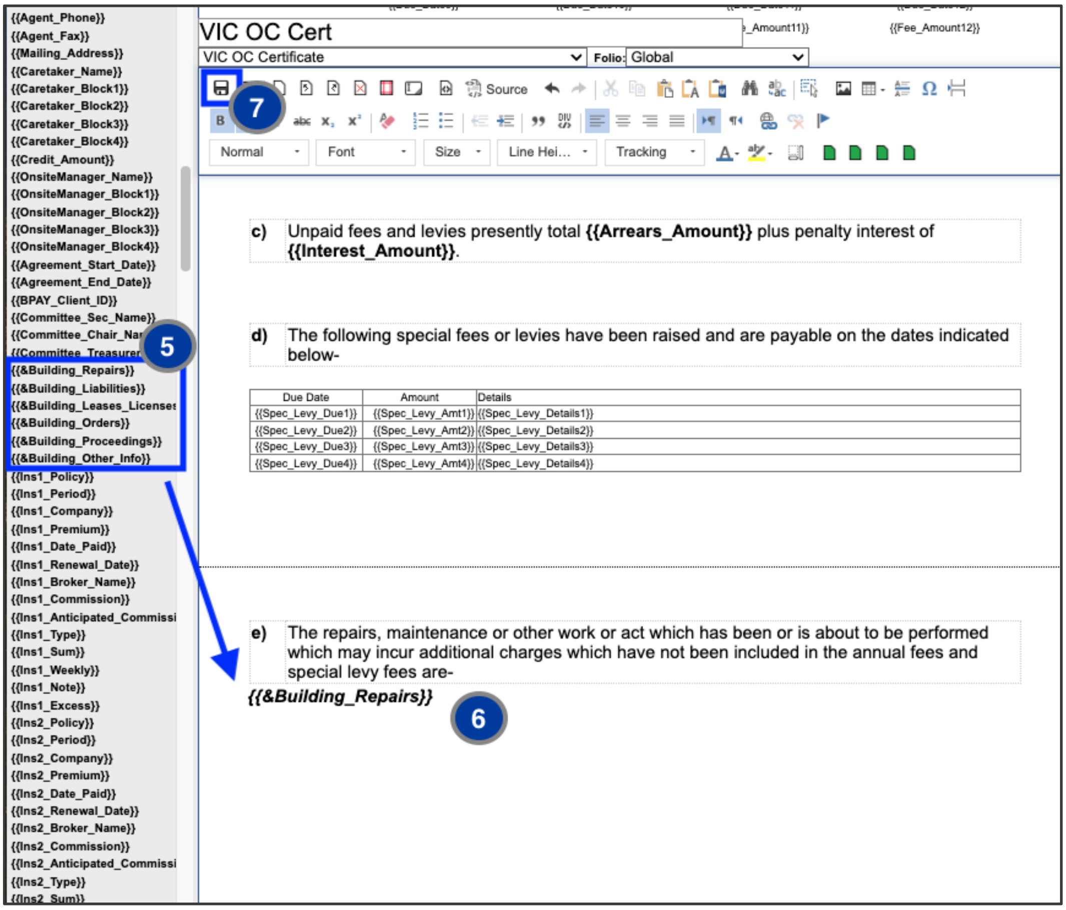


ADD MERGE FIELDS TO CERTIFICATE TEMPLATE

1. To update your certificate template, go to *File>Templates>Standard Merge Templates screen*
2. Select the State filter to view templates specific to your State (if not already selected)
3. Find and click on the relevant certificate template in the list
4. Click on *Edit* button to open and edit the template. Alternatively, you can double click on the template in the list to open and edit.



5. Find and locate the new merge fields in the merge field list. You can click 'Ctrl' + 'F' on your keyboard to search content on the screen.
6. Insert them into your template where applicable
7. Click the Save button to save your changes



ATTACHMENTS TAB

To make it easier for you to manage certificate attachments, you can now set documents as default attachments for certificates from the building card.

From the attachments tab, you can:

- add, view, remove and re-order documents you want included as default attachments to certificates.
- for buildings with more than one certificate type (QLD, ACT), you can also select whether a document is attached to all certificates, or only one certificate type.
- for buildings where only one certificate type is applicable, you'll see 'All' as the type by default.

Any default attachments relevant to the certificate type being generated, will be automatically included within the *Attachments* accordion on the certificate generation screen, where you can then do a final review, reorder, remove and add custom attachments as required before generating a new certificate.

IMPORTANT NOTE: Any changes made to default attachments will only apply to newly generated certificates and will not affect any certificates in a draft or published state.