PropertyIQ

Information Certificates – Australian Capital Territory

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INTRODUCTION

An information certificate is a legal document that discloses specified information about a lot. Usually it is requested by solicitors and conveyancers on behalf of a prospective purchaser when a lot is being sold.

 As these documents have different titles, depending on what State or Territory they are in, PropertyIQ uses the name information certificates across all States.

The information certificate in the ACT is a section 119 unit titles certificate.

You can generate information certificates singly from a lot owner's card or you can generate information certificates in bulk from a building card.

INFORMATION CERTIFICATE TEMPLATE

Before generating information certificates, you should ensure the standard merge templates are configured for your company. For full details about templates, see the manual "Templates"
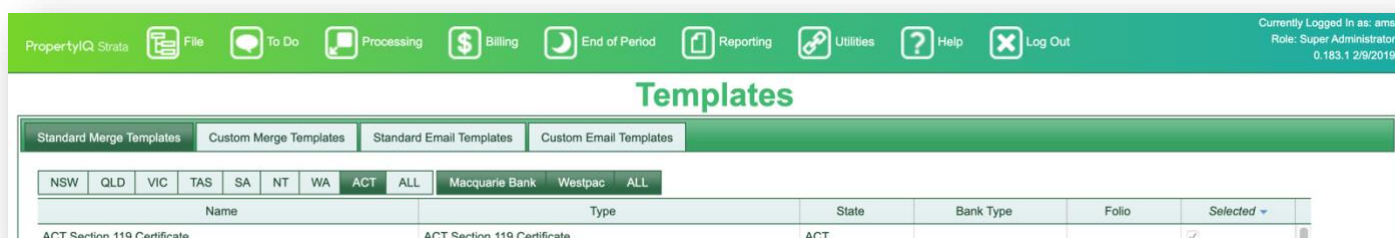
GENERATING AN INDIVIDUAL INFORMATION CERTIFICATE

You can generate an information certificate from the lot owner card.

Go to [File icon] and select lots/owners.
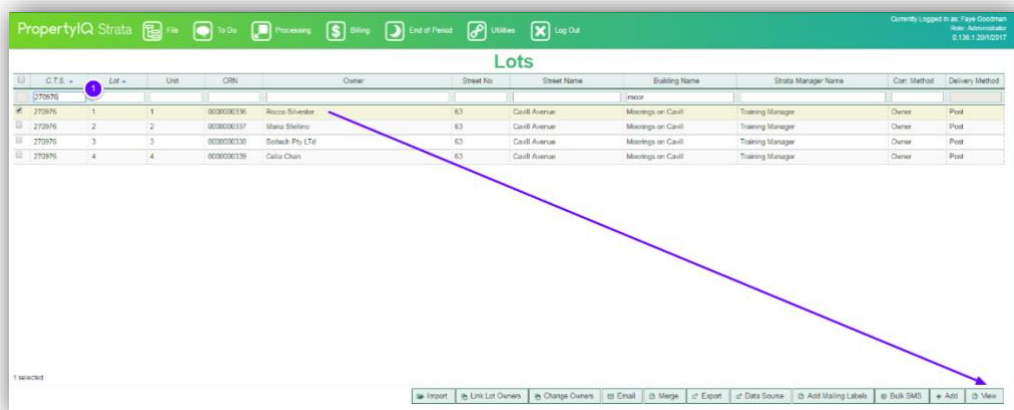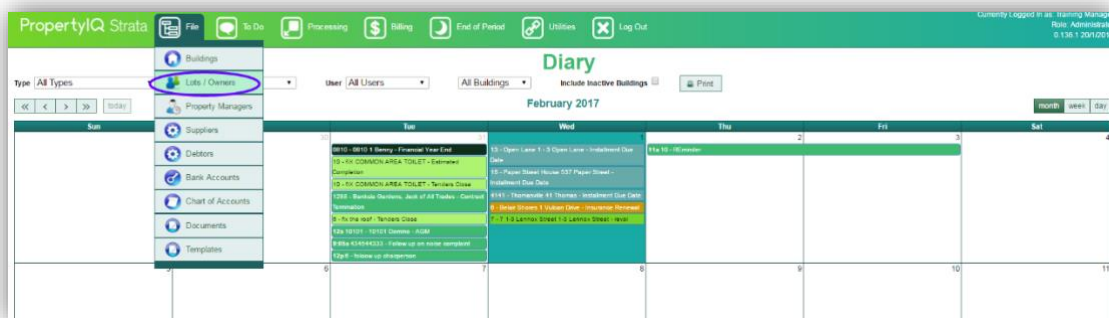
1. Enter some key letters to find the lot you are looking for
2. Highlight the lot owner. *View* (or double click on the lot owner) to open the lot card

Select *Info Certificate* to start the info certificate generation.

1. Today's date is the default, but you can use the calendar to update or overtype with a different date
2. Select which register reports you want to print. Selected register reports will be generated as a PDF and attached to the information certificate.
3. The details of levies for this lot show here. You can click on the cross to remove a line item. Note: this does not delete the levy, it just removes the detail from the information certificate
4. *Generate.* This opens the info certificate template for editing

1. Peruse the document and edit carefully where needed
2. Use the editing functions to edit the document if required. For full details about editing documents, see the manual "Templates".
3. Click here to save a draft copy of the certificate.
4. Click here to save the final document. This generates a document in the lot owner card – document tab.

You can save a draft of the document and return to this at a later stage.

GENERATING BULK INFORMATION CERTIFICATES

You can create information certificates in bulk from the building card. To get started, click *Info Certificates* from a building card.
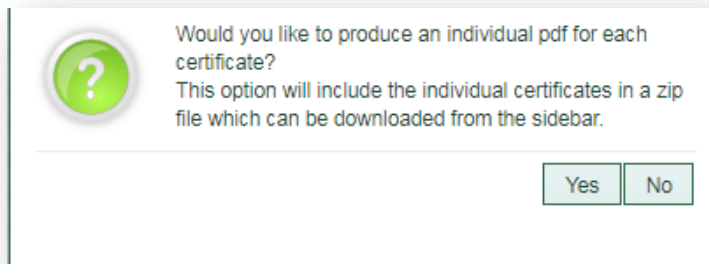

1. The certificate date defaults to today's date, but you can click on the date to open the calendar and alter the date.
2. The default is to produce a consolidated certificate. If the building has more than one contribution schedule, you can select a single schedule from the dropdown list
3. You can click in boxes to select lots individually or click in the box on the top line to select all
4. *Preview* creates a preview in the job centre on the right of your screen
5. *Generate and Save* when you are ready. You will have the option to produce an individual PDF for each certificate. This will create a zip file from which you can print each certificate individually or you can generate a Bulk PDF.
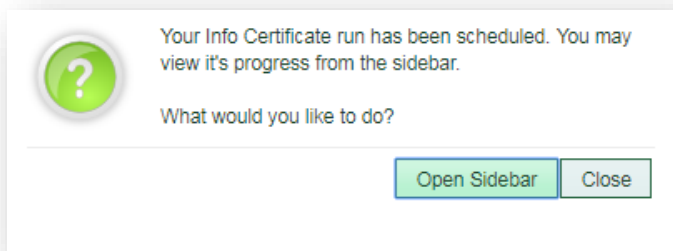6. *Save* to save a draft that you can edit later

When you select *Generate,* you will see the following popup:

A task is created in the job centre on the right of your screen

The completed info certificate document is saved in the documents tab of each lot owner card certificates were produced for.