

Certificates

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The instructions in this article cover the various functions available in **Certificates**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

When a property is sold, the purchaser requires a certificate containing details of the property. These could include levies, current insurance policies, and exclusive use areas.

StrataMax automatically selects the certificate which is appropriate for the building type based on the state that the building resides in and its legislation. So for a Queensland building using the type B.F.P., StrataMax will print a *Body Corporate Information Certificate*.

To create the certificate, StrataMax merges info from various areas within the system to produce a strata certificate. The levy data for example is collected using the balance fields in levy invoice codes. It is imperative that certain levy invoice codes are not changed since it will compromise the accuracy of the certificate, as well as some StrataMax reports. More information can be found in [Levy Invoice Code Setup](#).

An optional cover letter may be printed automatically with a certificate.

Before printing a certificate, you should make sure that [office bearers](#), [asset register](#), and [insurance](#) information is up to date and that all receipts for the subject lot have been posted.

Documents such as copies of levy registers and the asset register report can be automatically printed with each certificate, and the settings can be configured differently for each building. Documents with specific information can also be automatically printed with each certificate if needed.

We also have the [Certificates Video](#), which covers the Certificates process.

Certificates Configuration

This section covers the *Configuration* settings under the *File* menu.

Configuration

Certificates

Options

☐ Current Year Levies Only

Minimum Asset Value

☒ Show Adjusted Paid To Date

Certs for Current Year Only

☒ Allow No Record Of Emailed Certificate

Close

Current Year Levies Only (User Setting)

Only the levies that fall within the building's financial year will be displayed if set.

Minimum Asset Value (Global Setting)

Any asset below the amount set in this field will not be displayed in the [Asset Register](#) on the certificate.

Certs for Current Year Only (Global Setting)

This sets the default for which template will be used when the **Certificates** menu is first opened.

Allow No Record of Emailed Certificate (Global Setting)

If set, when the certificate is sent by email through StrataMax, it will prompt, 'Do you want to record this certificate as being issued by e-mail?' If *No* is selected, the certificate will not be recorded in 'Stored Certificates'. This setting is not recommended.

Report Settings

Screen

The certificate will display in screen-mode, allowing for it to be printed, emailed, saved as a PDF or Saved to DocMax.

Printer

Sends the certificate directly to the printer.

Template

This certificate template will be automatically set based on the combination of state and type and regulatory module for the building.

Printer, Paper Source and Copies

Select the printer and tray 'Paper Source' to which the certificate will be printed and the number of copies to be printed.

Letterhead

The default letterhead will be printed, or an alternative letterhead (if installed) will be available on the cover letter for production.

Cover Letter (Ellipsis button)

Select from one of the available cover letter templates. The wording of the cover letter will be created using the *Edit Cover Letter* button.

Info Editor

Some certificates have fields where more information can be added. This also will depend on the state and certificate. Click on Info Editor and select the certificate from the drop-down list. The editable fields will appear, and this information can be added for this building only or all buildings that use this certificate type.

Document Inclusion

Document Inclusion allows additional documents to be added to certificates from DocMax when they are produced. Select which certificate type to add a document to from the drop-down list, then select to add a document to the local building using *Add Document (This Building Only)* or to add a document to all buildings that use the certificate type using *Add Document (Global)*. This will open **DocMax**, which is ready for the document to be added from this application or a network folder.

Applicant Tab

See also [Certificate Applicants](#) to add, edit or delete an applicant.

The *Applicant* tab is for inserting the details of the individual or organisation that has requested the certificate. It is also where any applicable fees charged can be recorded. When used, this information will merge into the cover letter.

Application Fee

The amount charged for the certificate.

Select Applicants

Select the applicant for the certificate created from a list of stored applicants.

Select Owner as Applicant

Selects the owner as the applicant for the certificate being created.

Save Changes to Applicant Details

If an applicant is selected using the *Select Applicant* button, additional information can be added to the *Name and Address* field and in the *Reference* field. This button allows the additional information to be saved to that applicant's record.

Set Sundry Applicants

This is used to set up the initial Sundry Applicant. Once set (usually during the installation of StrataMax), it will rarely be used to create a certificate.

Applicant Details

When creating a certificate, the applicant's details must be added. The *Name and Address* field will populate the applicant's name and address details, and the *Reference* field can be used to enter the applicant's reference.

There are three options available:

- The applicant's details can be entered manually using the *Name and Address* field, which is not

recommended.

- *Select Applicant* from a list of applicants.
- *Select Owner as Applicant* to select the Owner as the Applicant.

Application Fee

The fee for the certificate can be entered in this field when the certificate is generated and can be set as the default, which will print on the cover letter if used and act as a tax invoice using the *Paid* or *Not Paid* radio button. No transactions are created using this area, and the additional **Disbursement** area can be set to create an automated charge for the administration of issuing a certificate where needed.

To set the application fee as a default:

1. Search or select **Certificates**.
2. Click the *Applicant* tab.
3. In the 'Application Fee Amount' field, enter the amount, then select the *Paid* or *Not Paid* radio button.
4. Then click *Set as default*.

Sealing Clause Tab

The sealing clause is used in certificates to authorise the affixing of the common seal for the plan. As the wording is slightly different for each state act, you can set a default sealing clause, including a blank clause for states that may not require this to be included, which will be automatically used when producing certificates for your state.

Creating or Editing a Sealing Clause

1. Search or select **Certificates**.
2. In the *Sealing Clause* tab, select the sealing clause most closely resembles the one you wish to use.
3. Edit the text of the selected sealing clause to contain the wording required in the new clause.
4. Click *Save As*, then click on *Global* (available in other buildings) or *Local* (available only in this building).
5. Enter the name of the sealing clause, then click *OK*.
6. Highlight the sealing clause, then click *Set as Default*. Depending on whether *Global* or *Local* was selected, this clause will be the default sealing clause.

The wording used in the sealing clause can be customised to suit your requirements; if there is no legislative requirement for any wording, a blank sealing clause can be saved and set as the default. Merge fields can be used to merge information found in **Building Information** or **Office Bearers**. The following legend shows the data that can be merged within the sealing clause.

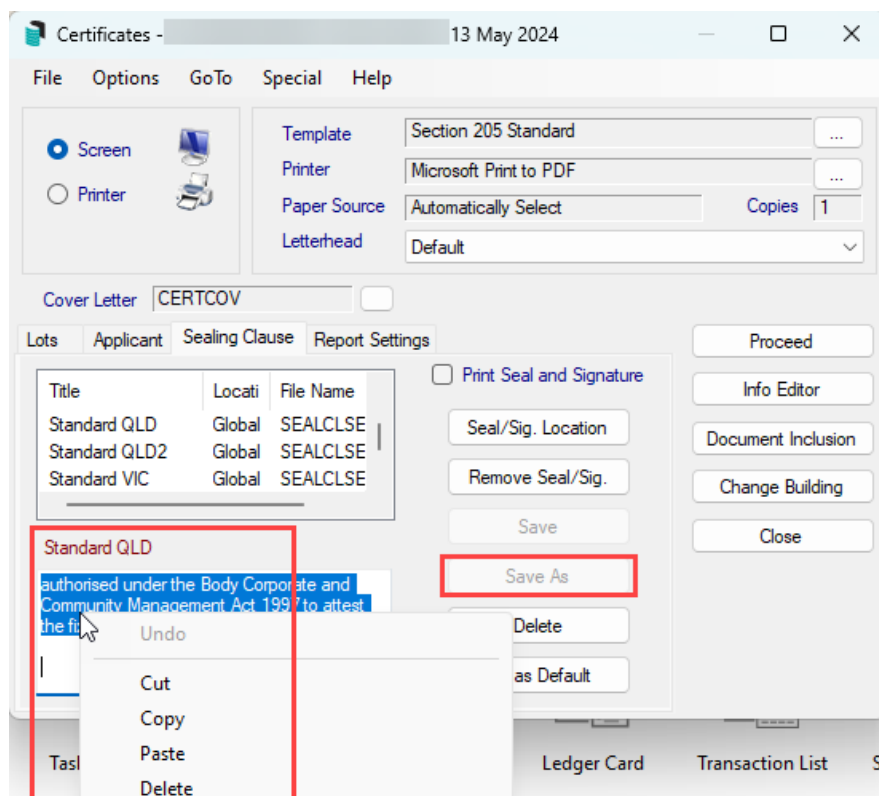
{BodyCorpManager}	The name of the Body Corporate/Strata Manager from Office Bearers .
{Title}	The Strata Plan Number or the name of the building.
{Name}	Name of the building.
{PlanType}	Plan Type in Building Information
{CTSNumber}	CTS Number field in Building Information .

{RegMod}	Regulatory Module set in Building Information (If None, this will be left blank).
{FullPlanType&Number}	Same as {Title} or the Plan Type and Number.
{PlanNumber}	Plan Number field in Building Information .
{Date}	Date in the format of DD Month YYYY (e.g. 23 April 2019).

Creating a blank Sealing Clause

The Sealing Clause wording can be adjusted to print blank. If multiple certificate types are used, each should be reviewed and removed if needed.

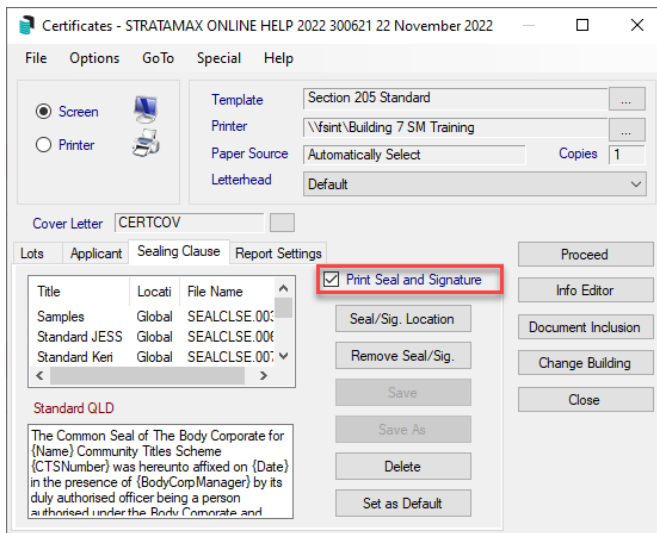
1. Search or select **Certificates**.
2. From the *Sealing Clause* tab.
3. Select the text from the preview area in the right corner, right-click it, and *Delete*.
4. Click *Save As*, select *Global* for all buildings or *Local* for the local building option, and enter a description for the blank wording.



Creating an Electronic Seal/Signature

The Common Seal and account manager's signature for a building can be scanned and added to StrataMax certificates. When a certificate is produced, the seal and signature are automatically affixed based. The seal and signature are first saved onto a Word document and can then be imported into StrataMax.

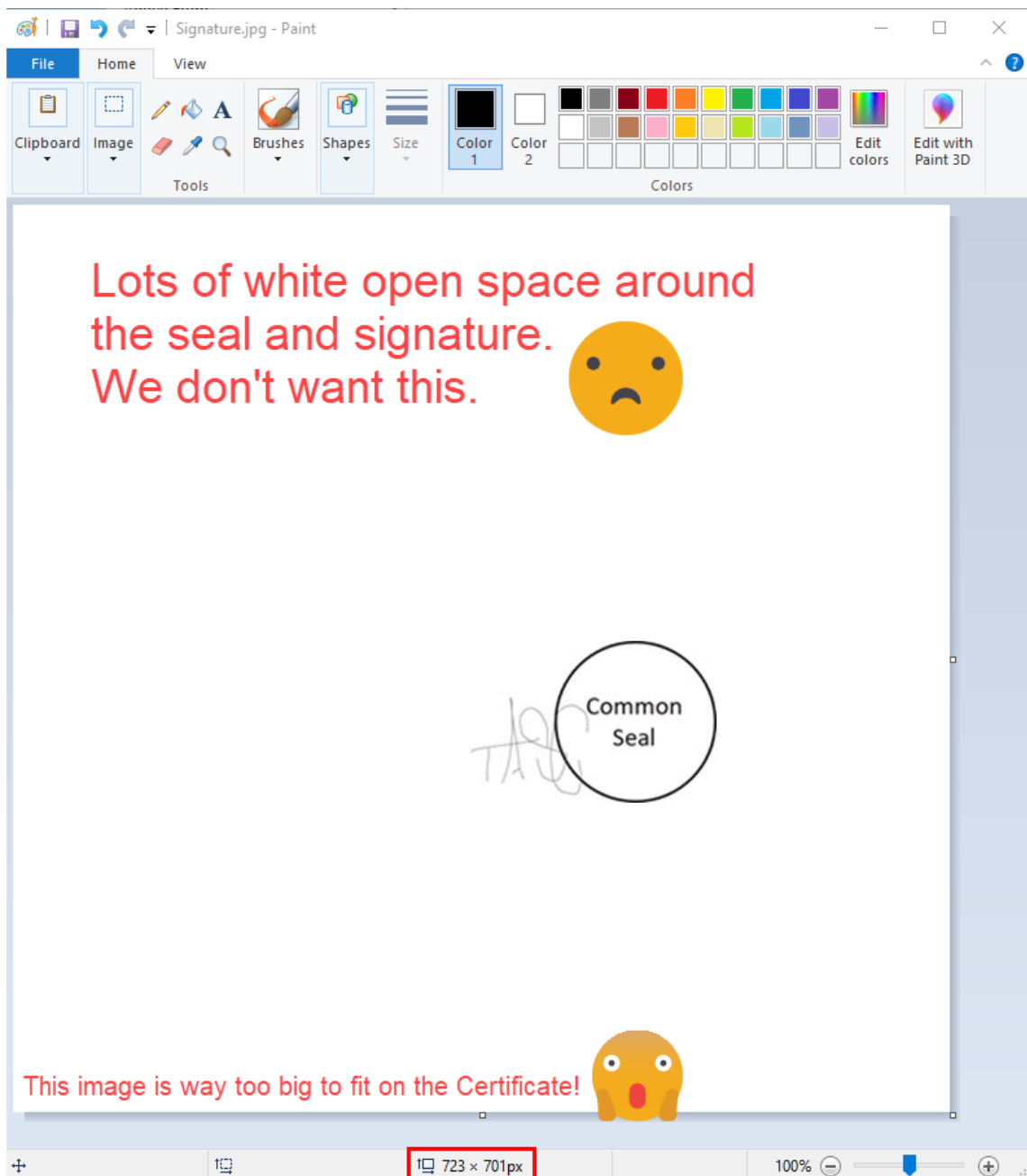
There is a per-user setting titled *Print Seal and Signature*, which must be ticked to produce the saved Seal and Signature.

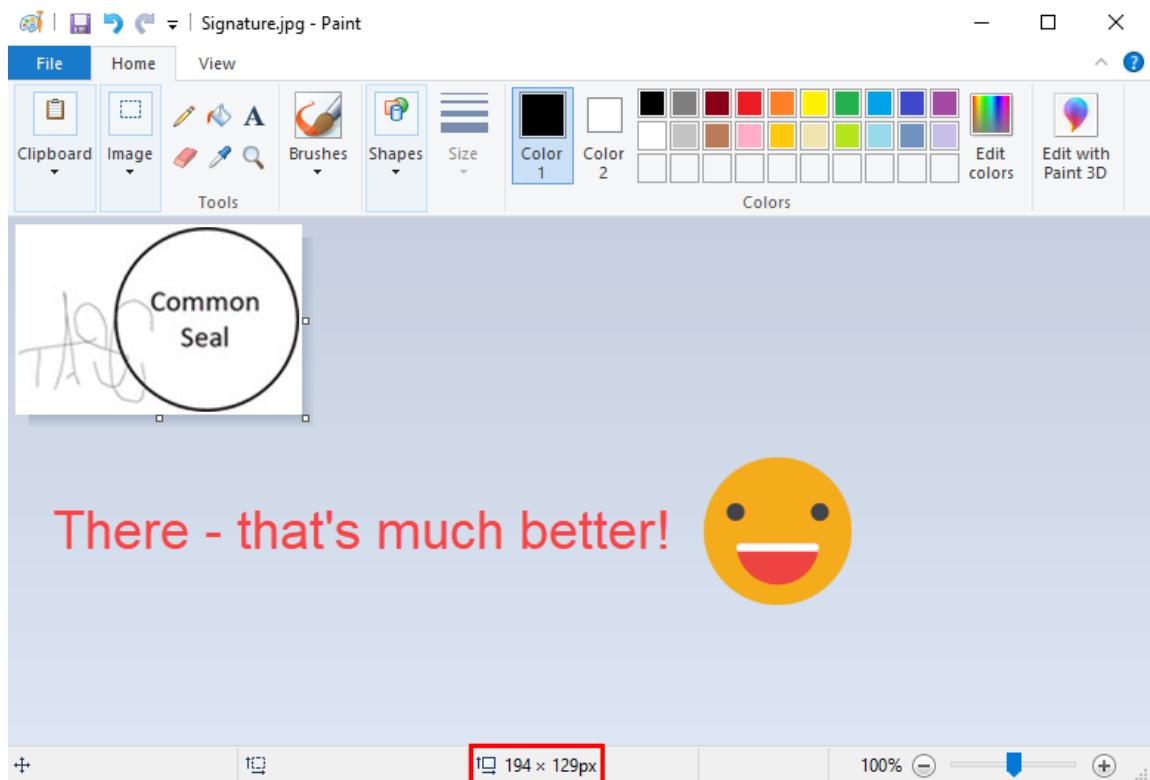


When the seal/signature is added to the Certificates menu, the document with the Common Seal and signature is automatically saved in DocMax for that building. The title will be 'Certificate Seal', which can be used in a Search to locate these documents. However, there will not be a category allocated, but more details can be added to the document properties if required.

Scanning and editing the Common Seal/Signature

1. Scan the building's common seal and the account manager's signature, making sure they are scanned in an image format. This should be .png or .jpg.
2. Now open the image in an image editor program like MS Paint, 3D Paint, Adobe Photoshop Express., Adobe Illustrator, etc.
 - All the open space around the seal and signature needs to be removed.
 - The image size needs to be adjusted so that the height is no bigger than **130 pixels**.





3. Once the image has been cropped so all the white space around the seal and signature is removed, and the height is no bigger than **130 pixels**, save the image and then insert it into a Word document.
4. Save the Word document, and make a note of the folder that it's been saved in - this will be needed in the next steps.

Adding an Electronic Seal to the Building

1. In **Certificates**, click the *Sealing Claus* tab.
2. Click the *Seal/Sig Location* button.
 - If this is a Multi OC building, an additional window will appear to select the required OC first.
 - A prompt asking to set one up will appear if no seal and signature currently exist. Click *Yes*.
 - If a seal and signature have already been set up, clicking the *Seal/Sig Location* button will open a new screen where the seal's positioning can be changed. However, the seal's size must be changed in the Word document.
3. Navigate to the saved Word document with the scanned seal and signature, and click the *Open* button. This will convert the Word document and automatically open the *Report Template Editor*.



4. To move the seal and signature, click on it first so the red box appears, then click on it again and hold the mouse button before dragging it to the required position.
 - **All** certificate templates across all states require the electronic seal be placed in **the upper-right corner** of the template (The template then manages the actual placement during processing and printing).
5. Close the *Report Template Editor* screen, and click *Yes* to save the changes.
6. Now, produce a certificate, but make sure the *Screen* radio button is selected to be previewed first to check that the seal and signature are in the correct position.
 - Select any lot from the *Lots* tab and any applicant from the *Applicant* tab. Make sure the *Print Seal/Signature* is ticked, then click *Proceed*.
7. Scroll down the preview screen to where the seal and signature are to ensure they're in the right spot. If not, close this screen and click on the *Seal/Sig*. Use the *location* button again to move it to the page. However, the **seal size** must be changed in the Word document.

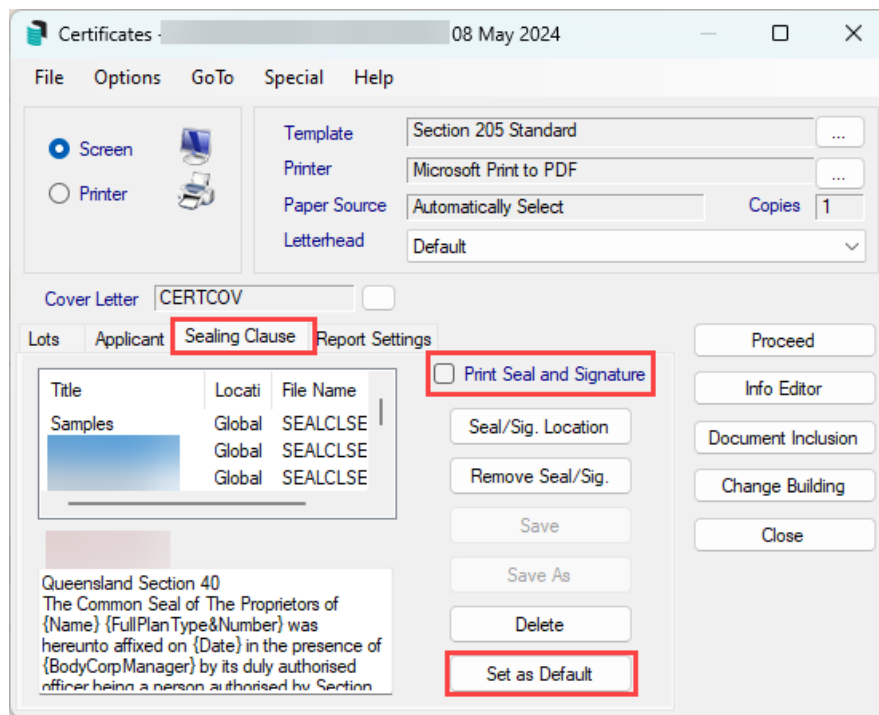
Recreating a Seal and Signature

There may be instances where the Certificate Seal has already been created but needs to be replaced. In the *Sealing Clause* tab, click *Remove Seal/Sig*, then follow the instructions above to add an Electronic Seal.

Disable the Seal and Signature

The below instructions can be applied to stop the seal and signature from printing on a certificate. There is no need to delete any saved seals/signatures; disable this tick box so it no longer prints on the certificate.

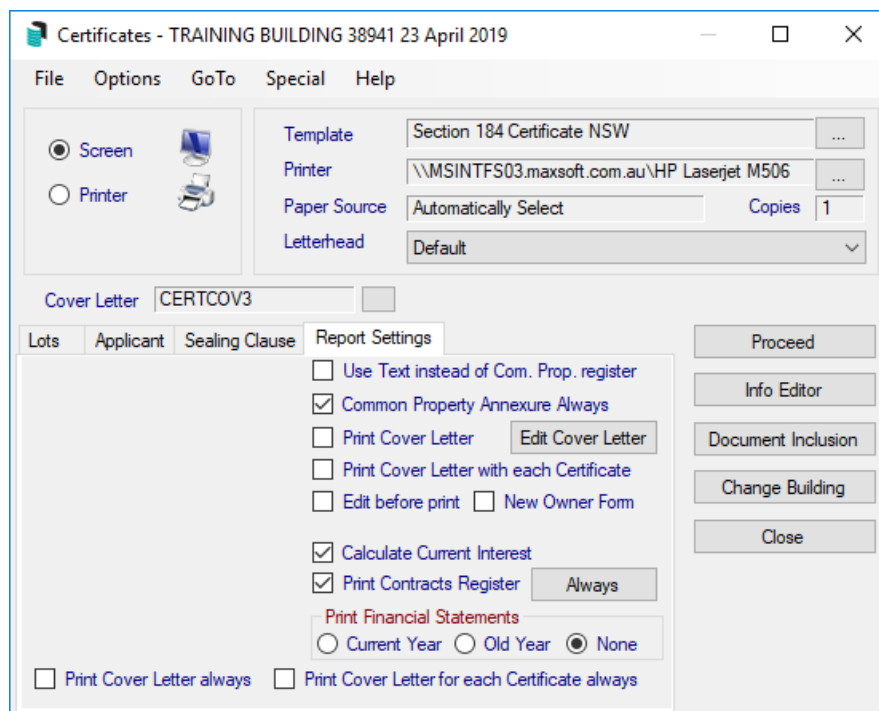
1. Search or select **Certificates**.
2. From the *Sealing Clause* tab.
3. Untick the *Print Seal and Signature* tick box.
4. If this is to be applied as the default for the selected certificate type, click *Set as Default*.



Report Settings Tab

The *Report Settings* tab has settings which allow other reports to print when a certificate is produced.

Some state acts and building combinations allow the applicant's details to be printed on the certificate. For those that don't, a cover letter can be created and added to the certificates.



Use Text instead of Com. Prop. register *(This option must be selected each time a certificate is produced)*

When printing a certificate, the Common Property Register is automatically printed along with the certificate.

You may type common property information directly onto a text file for a certificate, or set this information up in the Common Property Register. This is much quicker and easier if all lots have the same information.

By default, StrataMax will print the Common Property Register report.

Common Property Annexure Always

Tick to print the Common Property Register. Please see [this](#) article on managing the Common Property Register for more information.

Print Cover Letter *(This option must be selected each time a certificate is produced)*

Tick to print a cover letter after it is setup. Click *Edit Cover Letter* button if you need to edit the letter instructions below on how to create a Cover Letter.

Print Cover Letter with each Certificate *(This option must be selected each time a certificate is produced)*

Set to print a cover letter with each certificate. StrataMax will generate a code which can be used for applicants to purchase subsequent Certificates online. Refer to On-Line Certificates for full details.

Edit before print

Opens the 'Report Data Editor' window after clicking the *Proceed* button, where certain fields can be edited to appear on the certificate. This may not work for all templates selected. Note also that this function is progressively being phased out of this screen as new functionality is being introduced.

New Owner Form

If set, a Roll Details New Owner form will print with the certificate.

Right click on the New Owner Form words to open the template selection screen to select the New Owner Form template. There are only two templates to choose from.

Calculate Current Interest

Interest is calculated daily but does not post on the lot account until a payment is made, or the month end rollover is conducted. This option will add any accrued interest to the payable amount.

Print Contracts Register 'Always' button

Click on the 'Always' button to always print contracts.

Print Financial Statements

Select from one of the options to print a Financial Statement for the *Current Year*, the *Old Year* or *None*.

Print Cover Letter always and Print Cover Letter for each Certificate always

These two tick boxes are default settings. If set, this will keep Print Cover Letter always and Print Cover Letter for each Certificate always on.

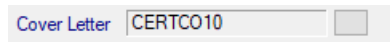
Creating a Cover Letter

The certificate cover letter uses a cover letter template as a base template and then text can be added to appear within this template. Merge fields may be used to merge the data on to the cover letter.

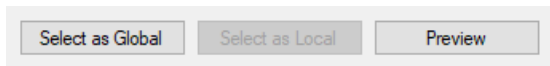
Selecting a Cover Letter Template

A cover letter template only needs to be selected as required. If changes are required for the text, use the instructions below to edit the text in a Cover Letter.

1. Search or select **Certificates**.
2. First select the cover letter template in the *Settings* tab.



3. Click the button next to the 'Cover Letter' to view the templates.
4. Highlight the template and click *Preview* to preview the template, or *Select as Global* to set the selected template.



5. Click *Close* to close out of the selection screen.

Editing the Text in a Cover Letter

1. Search or select **Certificates**.
2. In the *Report Settings* tab, click *Edit Cover Letter*.
3. Select *Global* if creating a cover letter that will apply to the certificates in all buildings, or *This Building* for this building only.
4. Edit the text in Notepad.
5. Save the text file or close and click *Save* on the exit prompt.

Edit the Text in a Cover Letter - PEXA & Online Payments

The cover letter can be edited to include the StrataPay Reference Number for the associated Lot Account so that the details can be used to make payments using the individual unique StrataPay Reference Number and the StrataPay Biller Code or BSB - this transaction will reconcile automatically through the **Bank Rec**.

The BSB number and Biller Code are hard coded on the *Levy Notice Deposit Slip* and can be typed into the cover letter following the below steps.

1. Search or select **Certificates**.
2. Click the *Report Setting* tab.
3. Click *Edit Cover Letter*.
4. Select *Global* or *Local* as required. Global will report across your portfolio.
5. Enter text for the cover letter including the BSB/Biller Code and StrataPay Reference special text
<StrataPayRef>:

BSB: 067-970

or

Biller Code: 74625

Account Number: <StrataPayRef>

6. Click *File > Save*.

7. Produce a sample Certificate for a Lot A/c to ensure the cover letter has been set as required.

The property Bank Account Number should not be supplied for payments as the transaction will require manual allocation in the Bank Rec.

Setting the Defaults for the Cover Letter

1. To set the cover letter as the default every time.
2. In the *Report Settings* tab, at the bottom on the screen is the default settings, check or uncheck the *Print Cover Letter Always* and *Print Cover Letter with each Certificate* option.
 - If this is ticked the two options above it (next to *Edit Cover Letter* button) will automatically be ticked.
 - If this is unticked, the two options above will not be ticked.

Document Inclusion

Document Inclusion allows documents to be added to a list so when a certificate is produced, these documents are automatically printed as an addition to the certificate. Documents can be add locally (for this specific building) or globally (for this certificate for all buildings).

It's important to note that the documents added to Document Inclusion will not be available via Online Certificates.

Lots with Utility Subgroup

If the subject lot is in a Body Corporate, which is bulk-billed for electricity. Individual meters for each lot are read periodically and bills are sent by the Body Corporate manager either to the owner or the tenant. In any event liability for unpaid electricity charges rests with the owner.

If bills are sent to the owner, the attached certificate will include amounts owing up to the last meter reading. For settlement, allowance must be made for any amount owing pursuant to a final reading.

The new owner will be responsible for any unpaid electricity charges. It is therefore recommended that a sum be withheld at settlement.

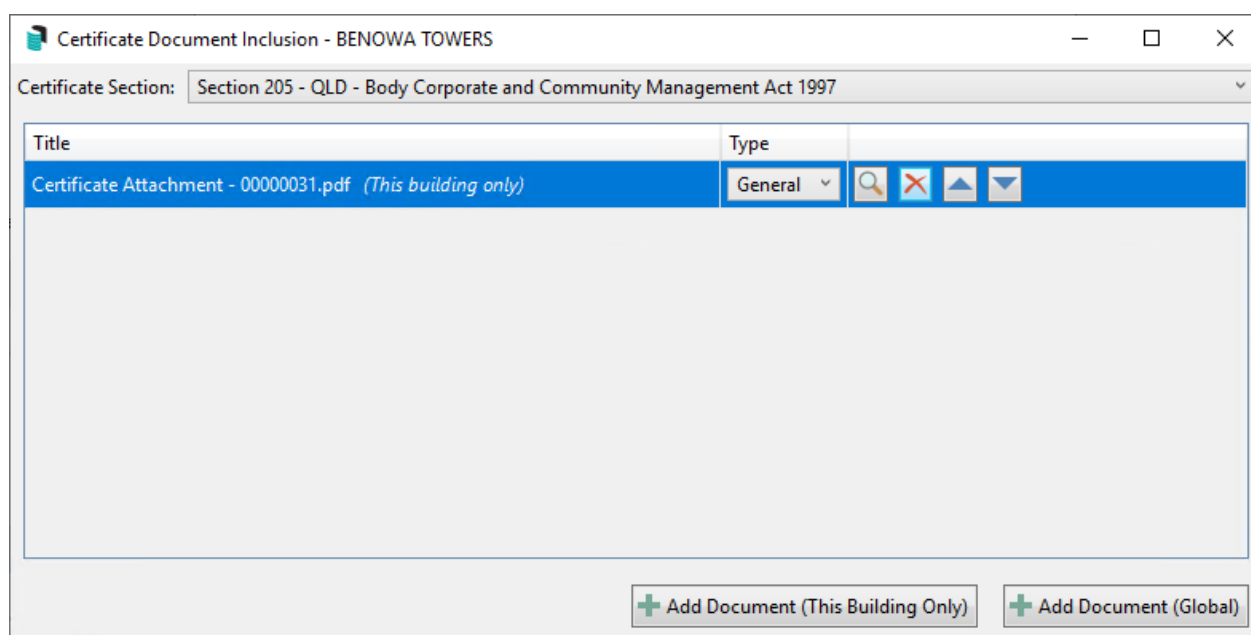
Adding the Document to the Document Inclusion List

1. In **Certificates**, click *Document Inclusion*.
2. Highlight the Certificate that the document will be added to, then click *Add Document*, either locally or globally.

3. This will open the **DocMax** 'Add Document' screen.
4. If the document is already in DocMax, navigate to it and click *Select Document*.
5. If the document is not in DocMax, you can either navigate to it using the *Add New Folder Location* option (in the list to the left), or save the document to the Windows Desktop and locating it using the *Desktop* folder, then click *Select Document*.
6. Once added, select the document type using the drop down list, either General, Electricity/Utilities Letter or Unliquidated Claims.
7. Use the navigation buttons to view, remove or move the order of the document.
8. Repeat if more documents need to be added.
9. Close by click the X at the top of the Document Inclusion window.

Deleting the Document from the Document Inclusion List

1. In **Certificates**, click *Document Inclusion*.
2. Highlight the document to be deleted by clicking on the Title.
3. Click the red X and then click Yes to confirm deleting the attachment.



Printing a Certificate

StrataMax will automatically select the certificate which is appropriate for this building/state. There is additional information in [this article for Queensland Disclosure Statements](#).

Before printing a certificate, ensure the following:

- Office Bearers and Insurance information is up to date.
- All receipts for the subject lot have been posted.
- Utility Groups: There is a a function that will allow any Utility setup to be added to the Certificate from the Document Inclusion list. The note can also be added on the cover letter.

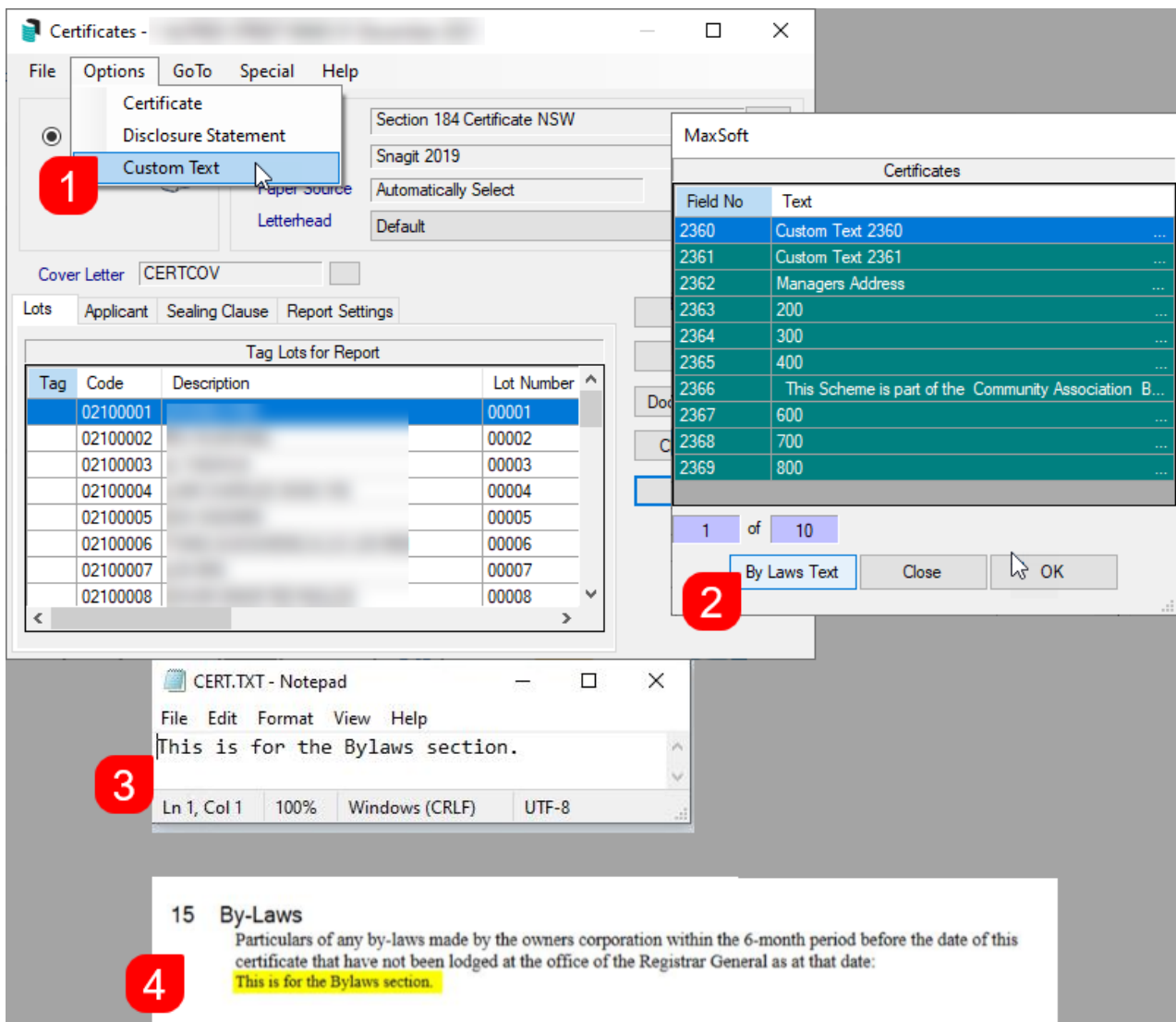
1. Search or select **Certificates**.
2. Tag the lot in the *Lots* tab.
3. Select the applicant in the [Applicants tab](#). Using either the *Select Applicant* to pick a non-owner contact or *Select Owner as Applicant* to pre-fill from the lot selected's contact information.
4. If this is not set for default and is required, type in the fee in the 'Application Fee' field. Select whether the fee has been or has not been paid, which will be output on the cover page if included.
5. In the *Report Settings* tab, select the additional reports to include, for example, the Contracts Register. Once selected, click *Always* to set it as the Default. For infrequent requests that do not require these reports to be included, untick the reports before producing the Disclosure Statement.
6. Review the 'Print Seal and Signature' box in the *Sealing Clause* tab to include or exclude any saved Seal and Signatures.
7. Set any other disclosure statement or general report settings you require using Info Editor or Document Inclusion.
8. Click *Proceed*.

A copy of the Certificate will be available in [DocMax](#) and on the [Roll](#) as an attachment.

Edit By-Laws Text

These are the required steps to edit the By-Law text.

1. In **Certificates**, click Options > Custom Text.
2. Click the *By Laws Text* button.
3. Notepad will open, where you can enter any required text before saving and closing Notepad.
4. Review the 'By-Laws' section in the certificate via a on-screen prview before printing/sending.



Edit Before Printing

Certificate details can be edited prior to previewing and printing the certificate or disclosure statement. The information changed here will not be updated in any part of StrataMax. This process should only be used for minor changes when there is a need for the certificate to be printed before any changes to the building are made. See the individual articles for each state under the [Certificates category](#) for information on the fields within the 'Report Data Editor' window.

1. Proceed to print a certificate as per the instructions above, then in the *Report Settings* tab tick Edit before Print.
2. Click *Proceed*.
3. This will present the 'Report Data Editor' window with a list of fields that can be edited.
4. To edit a field, select the field then click the *Edit* button.
5. Make changes to the text in this field, then click on *OK*.
6. When finished changing the information, click *Close* to continue producing the certificate.

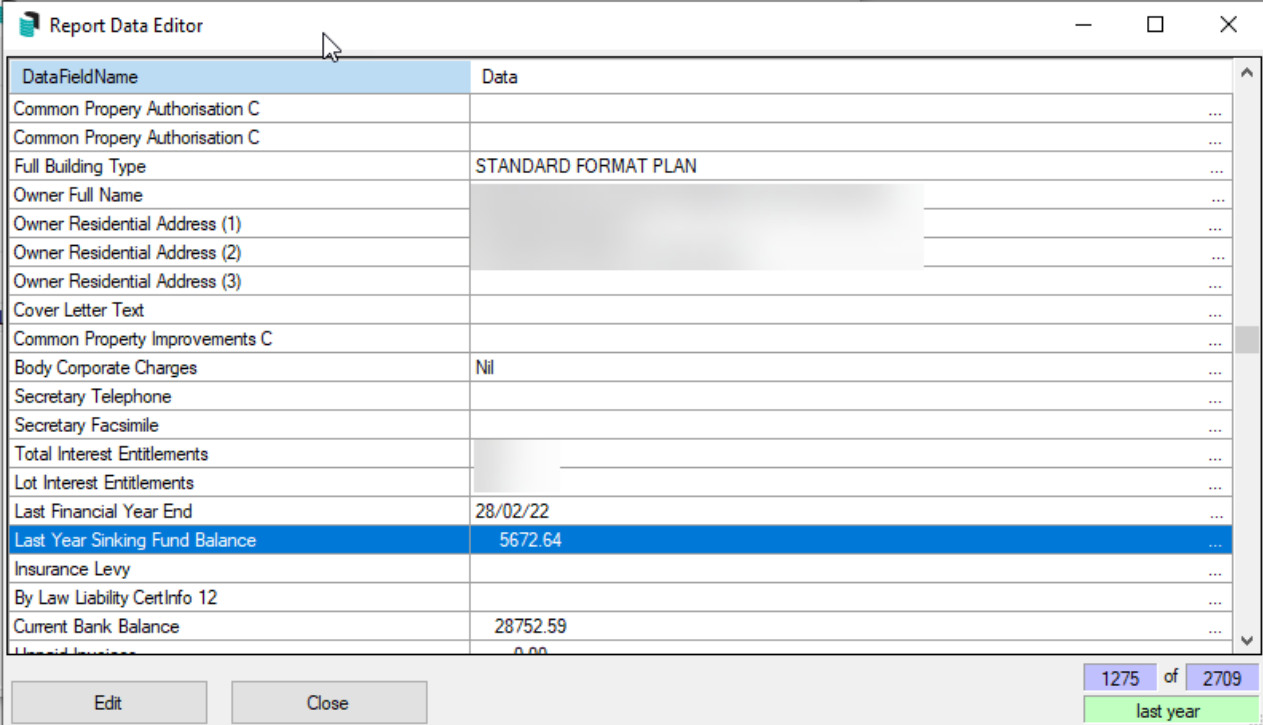
Certificates (Sub-Group)

For Certificates in buildings that have a utility group, a message can be included such as 'Electricity Supply Charges are Billed Separately', and you should check whether any unpaid amounts apply to this property. The note could be on the cover letter which can be accessed via [Certificates](#).

Alternatively, in Certificates in *Main > Options > Custom Text > Field 2360*, type in the message relating to Utility billing e.g *Please Note, this building has sub- metered Utility Billing, please contact this office* . This note will appear under the 'Additional Information' section on the certificate.

If the Sub-Group account is linked to the Main account via data links, and in Certificates > *Special*, the option *utility notice always* is ticked, then the amount of the due but unpaid utility charges for that lot will be reported under the 'Other Amount Due' field, on the Certificate.

Based on the Sub-Group financials, if using [Trading Fund Setup](#) with additional funds the certificate may need to be [edited before printing](#) to update any standard fund balances. For example, *Last Year Sinking Fund Balance* will report the balance of the Sinking Fund for the QLD Disclosure Statement.



Report Data Editor

DataFieldName	Data
Common Property Authorisation C	...
Common Property Authorisation C	...
Full Building Type	STANDARD FORMAT PLAN
Owner Full Name	...
Owner Residential Address (1)	...
Owner Residential Address (2)	...
Owner Residential Address (3)	...
Cover Letter Text	...
Common Property Improvements C	...
Body Corporate Charges	Nil
Secretary Telephone	...
Secretary Facsimile	...
Total Interest Entitlements	...
Lot Interest Entitlements	...
Last Financial Year End	28/02/22
Last Year Sinking Fund Balance	5672.64
Insurance Levy	...
By Law Liability CertInfo 12	...
Current Bank Balance	28752.59
Unpaid Levies	0.00

Edit Close

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last year

The Secretary information may also need to be annually populated via *Edit Secretary Address* within the Special file menu. This is due to **Office Bearers** not existing at the Sub-Group level. When selected, enter the Secretary Name and address information.

