

Overview

The **Documents** page allows you to upload, store, and organise important files related to your building's maintenance and management.

You can upload documents in a variety of formats, including **Word**, **PDF**, and **Excel** files.

This centralised library helps ensure all key documents are easy to find and accessible to everyone involved in the management process.

Uploading documents

- Click the **Add Document** button.
- Choose a file from your computer (e.g. Word, PDF, Excel).
- Select the **appropriate category** from the list.
- Once uploaded, the document will appear under its category, where it can be viewed or downloaded later.

“ **Note:** Documents uploaded via the [Work Tracker](#) feature are automatically added here as well, making it easy to access all related documents in one place.

For more details: [Create a document](#)

Document categories

Documents are organised by category to find documents easily:

- **Governance Compliance** – policies, procedures, and regulatory documents
- **Financials Budgets** – financial statements, budgets, and forecasts
- **Meetings Communications** – minutes, agendas, and correspondence with stakeholders
- **Maintenance Repairs** – maintenance records, repair logs, and service reports
- **Contracts Suppliers** – supplier agreements, contractor details, and service contracts
- **Insurance Risk** – insurance policies, certificates, and risk assessments
- **Building Services Operations** – operational manuals, servicing schedules, and maintenance plans
- **Residents Tenancy** – tenancy agreements, communications, and resident notices

- **Projects Renovations** – renovation plans, project proposals, and progress reports
 - **Legal Disputes** – legal correspondence, tribunal records, and dispute resolutions
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Key features

- **Secure storage:** all documents are safely stored within the platform.
 - **Easy access:** quickly view or download files when needed.
 - **Organised structure:** every document is grouped under a clear category.
 - **Consistent updates:** you can replace or remove outdated documents to keep records current.
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Example use cases

- Upload the **latest insurance certificate** under *Insurance Risk*.
 - Store **meeting minutes** and **budget forecasts** under *Meetings Communications* and *Financials Budgets*.
 - Keep **contractor agreements** and **maintenance logs** up to date under *Contracts Suppliers* and *Maintenance Repairs*.
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