DEEP SPACE™

Document Templates

Create templates, then generate, download and send documents for every commercial record

Deep Space Horizon · Commercial & Procurement · September 2026

Deep Space produces your commercial documents from **document templates**. These include progress claims, payment schedules, tax invoices, variations, subcontract agreements and purchase orders. A template holds the layout and wording. `${variables}` in it are filled with the record's live data and your Company Settings when the document is produced. This guide covers the whole cycle for every document type:

- setting up and publishing templates, and choosing which one each document uses;
- what must be in Company Settings first;
- generating and downloading a PDF;
- sending a document by email, and checking that it went.

Each register section shows what the document looks like. The examples come from a Deep Space test workspace (*"Test Legal Name Holodeck"*). They are cropped to the top of page 1.

1. Document types at a glance
2. HTML and Word templates
3. The Document Templates screen
4. Creating and editing templates
5. Which template a document uses
6. Company Settings: what documents need
7. Generating and downloading a PDF
8. Sending a document
9. Head contract documents
10. Subcontract documents
11. Purchase orders
12. Troubleshooting
13. Quick reference

Who does what. Workspace administrators manage templates under **Admin → Document Templates** and Company Settings under **Admin → Company Settings**. Anyone who can work a register can generate, download and send its documents.

1. Document types at a glance

Every template belongs to one **document type**. The type decides which register offers the template, which record data can fill it, and which email template goes with it.

Document type (as shown in Document Templates)	Where it is produced	Notes
Progress Claim PDF	Progress Claims to Client	The payment claim you serve on your client. Claim attachments are bound in at the end.
HC Payment Schedule (AU) / (NZ)	Client Payment Schedules (received)	AU or NZ follows the head contract's Region, else your company's country.

HC Tax Invoice	Invoices (to Client)	Tax invoice to your client.
Variation Order	Variations (VO), client side	Attachments and a T&Cs file are bound in at the end.
HC Progress Claim (tax-invoice layout)	Not offered on a register yet	A one-page client tax invoice for a progress claim (“Tax Invoice — Progress Claim”). Claims are produced with *Progress Claim PDF* today.
Subcontract Agreement	Subcontract Register	The body of the subcontract pack; Deep Space adds the cover and execution page.
SC Progress Claim	Progress Claims from Subcontractors	A formatted record of the subcontractor’s claim.
SC Payment Schedule (AU) / (NZ)	Payment Schedules (Issued)	AU or NZ follows the subcontract’s jurisdiction. Prints landscape pages where the schedule is wide.
RCTI (AU) / BCTI (NZ)	Payment Schedules (Issued)	Buyer-created tax invoices, offered when the subcontract’s tax mode is RCTI or BCTI.
Subcontract Variation	Subcontract Variations	Includes a statutory declaration under your state’s declarations act.
Purchase Order	Purchase Orders	PO attachments are bound in unless the template turns this off.

Opening **Admin → Document Templates** creates any standard template (and its email template) your workspace is missing, and updates the standard ones you haven’t changed. A template or email template you have edited is never overwritten. The *Out-of-the-box Document Templates* guide lists every standard template.

2. HTML and Word templates

A template is one of two formats. Both can be used for every document type, and the rest of this guide works the same for both.

	HTML template	**Word template**
Edited in	Deep Space’s section editor, in the browser	Microsoft Word on your computer: download, edit, then **Replace file**
Starts from	A standard template (Clone & Edit)	Your own .docx (Upload Word Template, up to 15 MB), or **Convert to Word** from an HTML template
PDF is made	In your browser. Pages are produced as images, so the text can’t be selected or searched.	By Deep Space’s server. Your fonts and layout are kept and the text is selectable.

Line-item tables	Built in: the standard templates print the record's tables	Put a table variable such as `${schedule_breakdown_html}` on its own line, or one row with `${item.*}` variables that repeats per line
Extra output	—	**Download DOCX**: the filled-in Word file, for editing
Shown as	HTML	Word / DOCX

For tagging a Word file with variables, see the *Word Document Templates: Customer Guide*. For every variable name and what fills it, see the *Document Template Variable Dictionary*.

3. The Document Templates screen

Admin → Document Templates lists every template in the workspace.

- **List or cards:** the list is the default view. Switch with the **List view** / **Card view** buttons; your browser remembers the choice.
- **Sidebar:** pick a category and document type, or *All Templates*. On a small screen it becomes a drop-down.
- **Search and status:** search by name and filter by Draft Published Archived.
- **Format:** **All** **HTML** **Word**, each with its count for the current view. *Clear filters* resets everything.
- **Upload Word Template** (top) adds your own .docx as a new Draft.

Each list row shows the title, document type, format, status and version, whether it is Assigned or in the picker, and when it was last updated. The ⋮ menu at the end of the row holds the actions. Cards show the same actions as buttons.

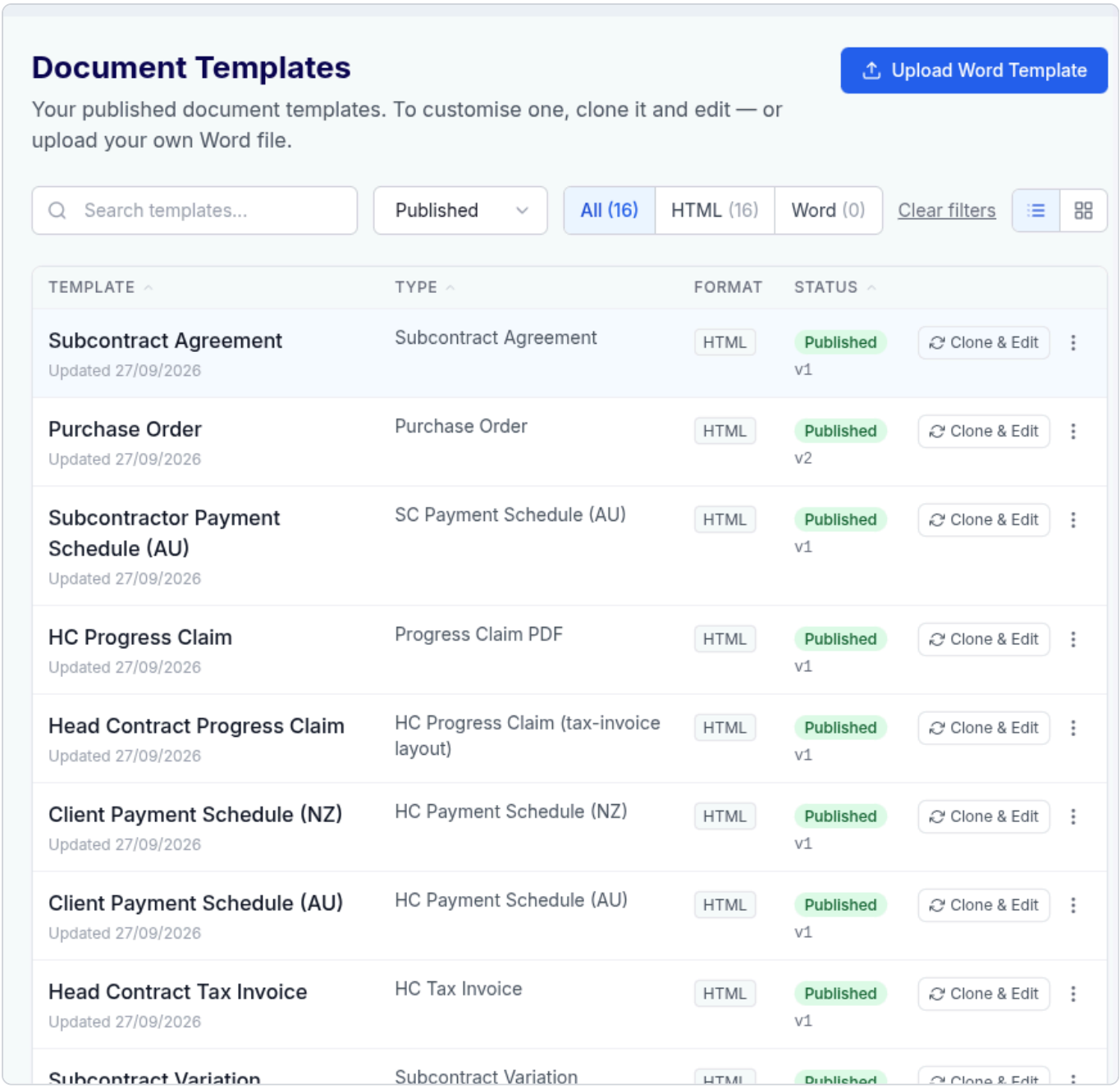


Figure 1. The list view, filtered to Published. Each row has **Clone & Edit** and a ⋮ menu: Open, Set as assigned, Add to picker, Clone & Edit, Convert to Word and Delete. On narrow screens the Type and other columns fold under the title.

Template actions

Action	Available on	What it does
Set as assigned / **★ Assigned**	Published templates	Makes this the default for its document type on every Generate, Download and Send. Click again (*Unassign*) to go back to the newest published template.
Add to picker / **Nominated**	Published templates	Pins the template up front in every picker for its type, next to the default.
Clone & Edit	Published templates	Creates an independent Draft copy (“Copy of …”) to edit. The original stays Published and assigned. On a Contract Template master it asks first (§4.5).

Convert to Word	HTML templates	Creates a Word copy (§4.3). Disabled on AS 4901 standard-form templates, which use a locked form.
Delete	All	Deletes the template after you confirm.

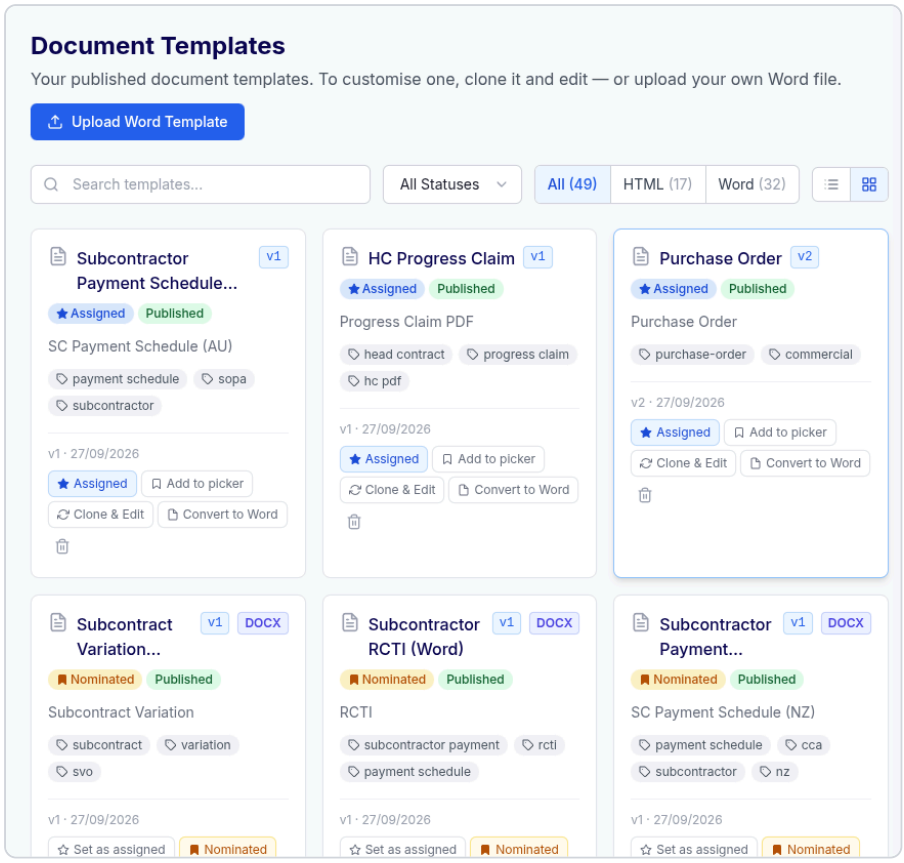


Figure 2. Card view. The format filter shows All (49), HTML (17) and Word (32). Cards carry *Assigned*, *Nominated*, *Published* and *DOCX* badges.

4. Creating and editing templates

4.1 Edit a standard template (HTML)

1. Open the Published template's menu and choose **Clone & Edit**. A new Draft opens in the editor.
2. Click a section in the preview, or pick one from *Sections*, to edit it. You can add, hide and reorder sections. A section can be marked *Keep on one page*.
3. Insert variables from the **Variables** panel on the left. It lists only the variables available for this document type, with an example of each, and ticks the ones already used.
4. Check the preview. **{} Variables** shows the raw `${names}`. **Sample** fills them: dotted underlines are sample data, and green shows values from your Company Settings. **Sample PDF** downloads a preview PDF made from placeholder data.
5. **Save**, then **Publish** when it's ready (§5).

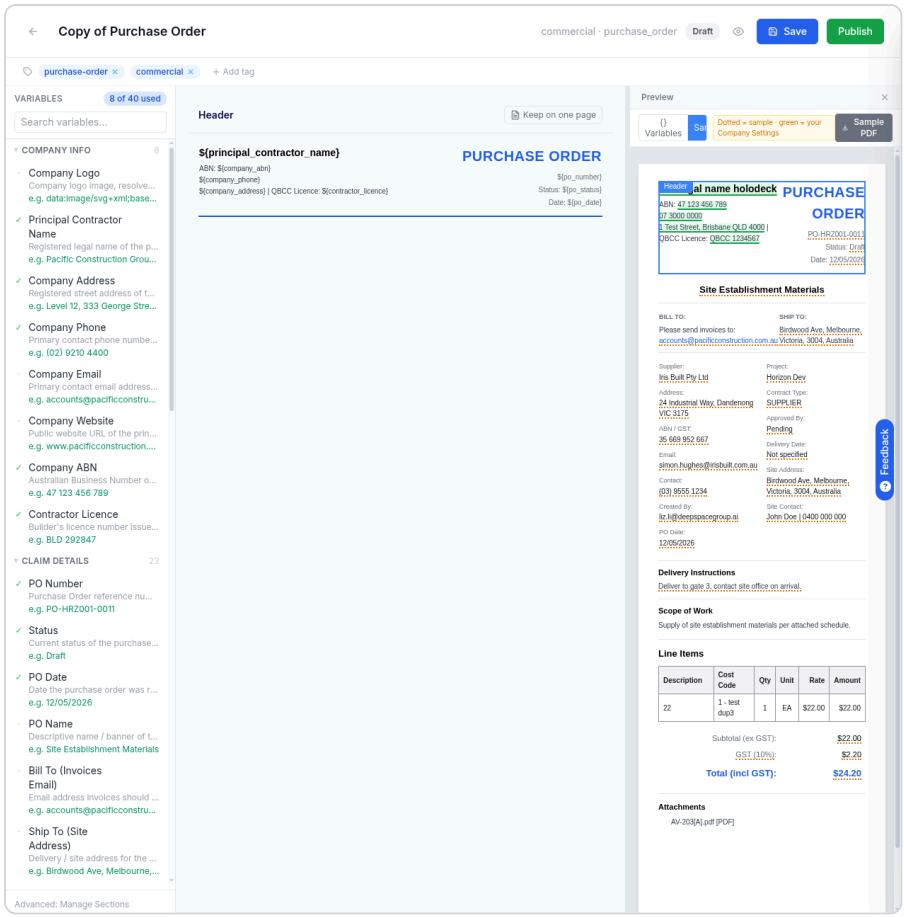


Figure 3. The section editor on a Draft Purchase Order template. On the left is the Variables panel, in the centre the Header section, and on the right the Sample preview, where green values come from Company Settings.

> A variable printed as `[name]` in the Sample preview is not a variable for this document type. The document would print it blank. Check the spelling against the Variables panel.

4.2 Upload your own Word template

1. **Upload Word Template**: give it a *Template name*, choose the document type and the .docx file.
2. The Word workbench opens on the new Draft. Tag values with *Suggested variables* (your Company Settings values found in the document) or *Find & Tag*, or type `${variable}` in Word.
3. Switch the preview between *Template* and *Simulated*. Simulated is rendered by the same pipeline as real documents.
4. **Publish** when it's ready. To change the file later, **Download DOCX**, edit it in Word and use **Replace file** (Draft only). On a Published Word template, click **New version** first (§4.4).

4.3 Convert an HTML template to Word

Convert to Word creates a **new Draft Word template** named "*title* (Word)", or "(Word 2)" and so on. The original is not changed, and the copy is not assigned or offered anywhere until you publish it. It opens in the Word workbench with a **conversion report**:

- whether every `${variable}` came across intact;
- that your logo is embedded in the Word file (a later logo change in Company Settings won't update it);
- anything removed for safety (scripts, external links or images);
- warnings about variables used only inside formatting, which need a manual check.

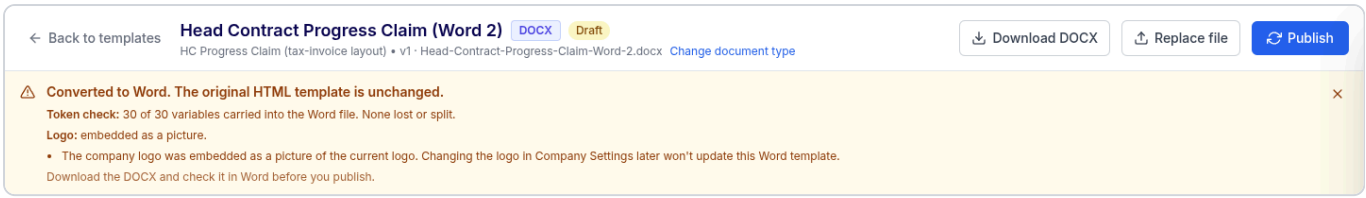


Figure 4. After Convert to Word: 30 of 30 variables carried into the Word file and the logo is embedded. Download DOCX, Replace file and Publish are top right.

Download the DOCX and check it in Word before you publish.

4.4 Versions

Templates are versioned. A Published version is locked. To change it, make its next version:

- **Word templates:** open the template in the Word workbench and click **New version** (top right). A Draft of the same template opens; replace its Word file, then publish it. If a Draft already exists, the button reads **Open Draft v3** (for example) and takes you to it.
- **HTML templates:** open the template in the section editor and click **Revise**.

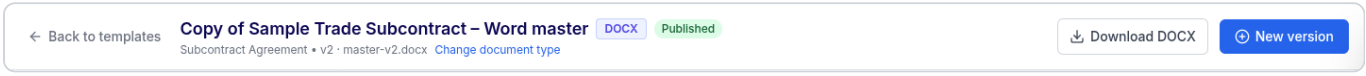


Figure 5. A Published Word template in the workbench: *New version* makes the next Draft.

When you publish the new version, the previously Published one is **archived automatically**. Documents already produced are never changed. Pickers always offer a template's newest Published version, so there is no version to choose. **Clone & Edit** is different: it makes a separate copy, not a new version.

4.5 Contract Template masters

A Word template that a Contract Template prints with is a **master**. Its row shows *"Used by:"* and the contract type, and it is never offered in the ordinary pickers (see the *Contract Templates* guide). Three things behave differently on a master:

- **New version is the way to change it.** Every contract type linked to the master prints its newest Published version, so publishing a new version changes their contracts (not ones already issued).
- **Clone & Edit asks first.** A copy is not used by any contract type, so edits to it never reach your contracts. Deep Space warns: *"Copy a contract template master? … To change the wording a contract type uses, open this master and choose New version."* Choose **Cancel** unless you really want an unrelated copy.
- **Publishing is checked.** On a Draft master the workbench lists *Contract types using this master* and checks the Draft against each Published one. If the new file drops, renames or adds a token or bookmark a contract type doesn't match, the problems are listed and **Publish** is disabled; Deep Space refuses to publish it either way. Fix the Word file, or publish it together with a matching new version of the contract type from that contract type's *Validate & publish* tab.

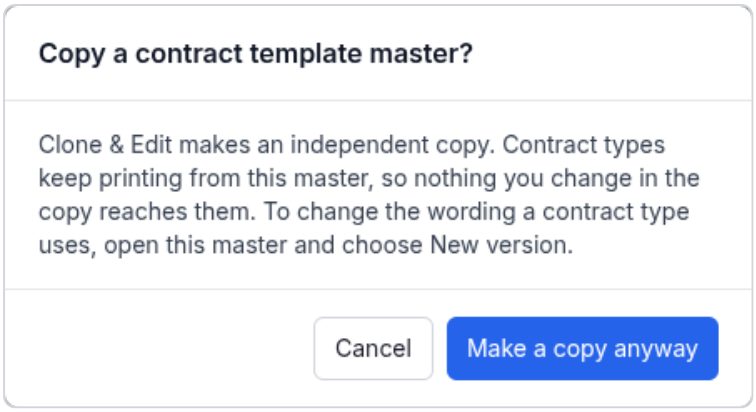


Figure 6. Clone & Edit on a master asks first.

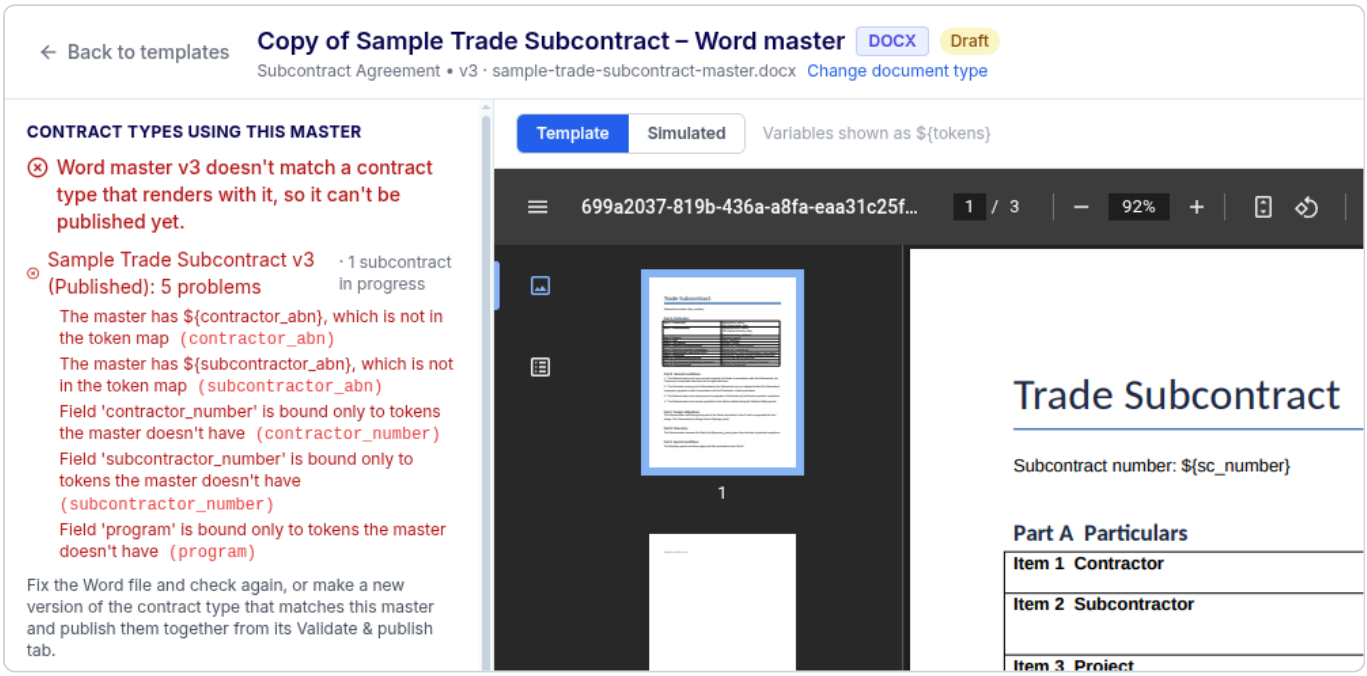


Figure 7. A Draft master that doesn't match its contract type: the problems are listed and Publish is disabled.

5. Which template a document uses

Only **Published** templates are ever offered to produce a document. Drafts are for the admin preview (Sample PDF, or Simulated in the Word workbench). Every Generate, Download and Send picker on every register follows the same rules.

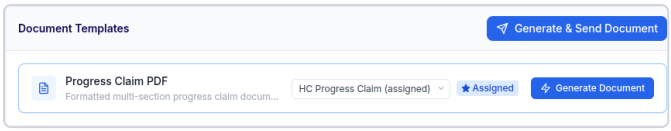
1. The default
The template marked ★ *Assigned* for that type. With nothing assigned, the most recently published one, labelled *Default (newest published)*.

+

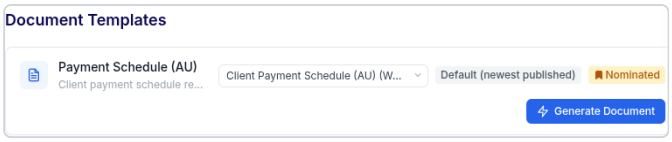
2. Pinned choices
Templates added with *Add to picker* (*Nominated*) sit next to the default. Purchase orders and subcontract agreements also offer the *System default layout*.

+

3. Everything else
Every other Published template of the type, behind *Use a different template (N)…*



An assigned default: “HC Progress Claim (assigned)” with the *Assigned* badge.



Nothing assigned: the newest published template is the default, and a pinned template shows *Nominated*.

Subcontracts remember their own agreement. Each subcontract records one agreement source: the contract type it was created with, a company approved document chosen in the Contract type selector, or a standard profile. Every screen of that subcontract reads the same record. On a subcontract linked to a company approved document, the pickers badge that template *Linked to this subcontract* (the workspace’s *Assigned* badge describes the workspace default, not the record), and the subcontract follows the template’s newer Published versions automatically. On a subcontract that uses a *contract type* there is no Document Template to choose: the Overview download, the Agreement tab and the Documents tab show the contract instead (see the Contract Templates guide, §7.8).

“Nothing is assigned…” warning when you publish. If no template is assigned for that document type, publishing makes the new template the default for every Download and Send, immediately. Deep Space warns you first: *“Nothing is assigned for Purchase Order, so publishing makes this the template every Download and Send uses. Assign one first, or publish anyway.”* To keep today’s documents unchanged, cancel, set the current template as Assigned, then publish.

6. Company Settings: what documents need

Letterheads, declarations and payment details come from **Admin → Company Settings**. Every document type checks the Company Settings values it needs before it is produced, on every path: Generate, Download, Send, Serve, Attach and the automatic sends. If one is blank, you see *“Company Settings is incomplete — Approver Name is missing, so this document cannot be produced. Complete it in Admin → Company Settings and try again. Nothing was sent or attached.”*, with an *Open Company Settings* link.

Document type	Requires (in addition to the company identity*)
Progress Claim PDF, HC Tax Invoice	BSB, Account Number, Security of Payment State
HC Progress Claim (tax-invoice layout)	Authorised Signatory, BSB, Account Number
HC Payment Schedule (AU / NZ), SC Progress Claim	Security of Payment State
Variation Order, Subcontract Variation, RCTI, BCTI	Authorised Signatory
SC Payment Schedule (AU / NZ)	Authorised Signatory, Security of Payment State
Subcontract Agreement, Purchase Order	—

* Company identity: Legal Name, Tax Number (ABN / GST number), Registered Address, Phone Number and General Email, printed on every letterhead. *Authorised Signatory* (Legal & Compliance) is what documents print as “Approver Name” / “Approved by”.

- A value only blocks where the template actually prints it. A customised template that leaves out the approver line is not refused for a blank Authorised Signatory.
- Website, Bank Name, SWIFT, Contractor Licence and the logo never block.
- An RCTI or BCTI is also never produced from a payment schedule that is still Draft.

Which acts and GST rate are used.

- **Security of Payment Act:** head contract documents use the contract's Region; subcontract documents use the subcontract's state. Company Settings' Security of Payment State is the fallback when the contract has none.
- **Statutory declarations** name the declarations act for the same state, e.g. *Oaths Act 1900 (NSW)*, *Oaths and Affirmations Act 2018 (Vic)*, *Oaths Act 1867 (Qld)*. The ACT uses the *Statutory Declarations Act 1959 (Cth)*, and New Zealand the *Oaths and Declarations Act 1957*.
- **GST:** claims, schedules and invoices use the contract's jurisdiction (10% AU, 15% NZ). Purchase orders use the project's jurisdiction, and fall back to Company Settings' default tax rate only when the project has none.

7. Generating and downloading a PDF

Every register record has a **Documents** tab with a card per document type. The card has the template picker (§5) and `Generate Document`.

1. Check the template. The card starts on the default.
2. `Generate Document` opens the Generate dialog. Values filled from the record, the project and Company Settings are shown pre-filled. Record values can be overridden for this one document; Company Settings values are locked.
3. Optionally switch *Page Orientation* for this export, and use `Show preview`.
4. `Download PDF`. For a Word template, `Download DOCX` gives the filled-in Word file instead.

A downloaded PDF is also **saved to the project's documents (CDE)** when the record belongs to a project. On progress claims and variations, the record's attachments are bound in at the end of the PDF.

8. Sending a document

`Generate & Send Document` opens the Send Document wizard. The same wizard is used on head contract claims, payment schedules, invoices and variations, and on subcontract claims, payment schedules, RCTI/BCTI and variations.

1. Select Template
The default is already selected (§5), so you can go straight to Next. The PDF is generated exactly as Generate would.

→

2. Email Template
Optional. Lists active email templates of the same document type, or tick *Use default system email template*.

→

3. Recipients
Add email and name. Some registers pre-fill contacts. Then `Send`.

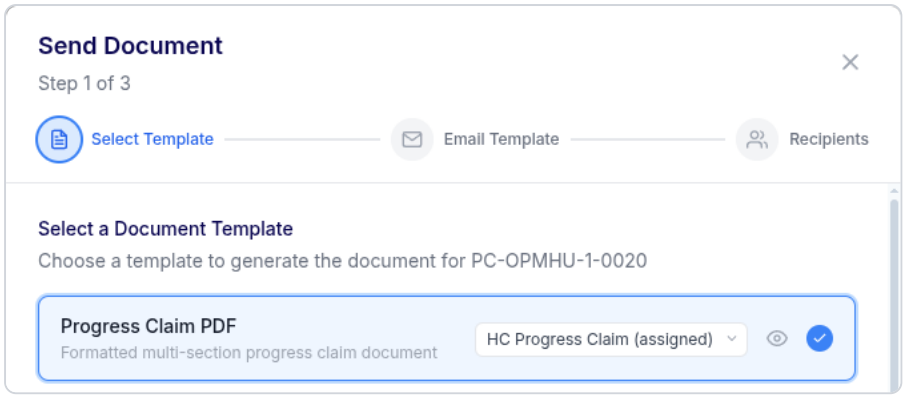


Figure 8. Step 1 on a progress claim: the assigned template is preselected (ticked), so Next is enabled.

What the recipient gets

- The email subject and body from the email template, filled with the record's values.
- The PDF attached. An email template can also include `${pdf_download_link}`, a download link that is valid for 7 days.
- The email is sent from your connected mailbox when you have connected one; otherwise it comes from Deep Space's mail service.

Safeguards: when nothing is sent

- **No PDF, no email.** If the document cannot be generated, you see *"Could not generate the PDF for … Nothing was sent."* Fix the cause and send again.
- **Company Settings incomplete** (§6): nothing is produced or sent.
- **Unfilled email variables.** If the email template uses a `${name}` that nothing fills for this record (often a typo), step 3 shows an amber notice. Send is disabled until you choose another email template, use the default, or fix it in **Admin** → **Email Template Library**.
- **Blank values** that are genuinely empty on the record are sent as blank. They never block the email.
- **Internal approval.** A Draft claim or variation that still needs internal approval can't be sent: the button is greyed out with *"Blocked until internal approval is complete"*.

Checking it went

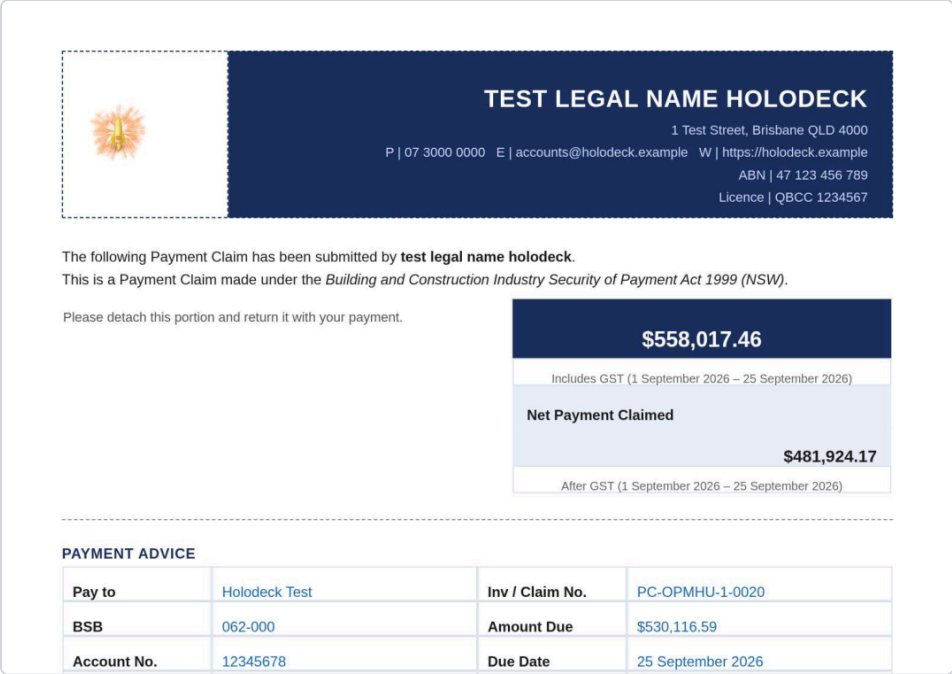
Admin → **Notification Log** lists every email with its status, and the reason when one failed. The matching email template for each document type is covered in the *Email Templates* guide.

9. Head contract documents

9.1 Progress Claims to Client: Progress Claim PDF

Button (claim drawer)	What happens
Documents → *Progress Claim PDF* → **Generate Document**	Generate dialog; Download PDF (or DOCX). Claim attachments are bound in; a copy is saved to the CDE.
Documents → **Generate & Send Document**	Send wizard (§8). Greyed out while a Draft claim awaits internal approval.

Header → **Serve Payment Claim** (Draft claims)	Generates the claim PDF and attaches it to the claim as the served document, then serves the claim; it can no longer be changed. It uses the template you last generated or sent *this claim* with, else the default. If the PDF can't be generated or saved, the claim is not served.



TEST LEGAL NAME HOLODECK

1 Test Street, Brisbane QLD 4000

P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example

ABN | 47 123 456 789

Licence | QBCC 1234567

The following Payment Claim has been submitted by **test legal name holodeck**.

This is a Payment Claim made under the *Building and Construction Industry Security of Payment Act 1999 (NSW)*.

Please detach this portion and return it with your payment.

$558,017.46

Includes GST (1 September 2026 – 25 September 2026)

Net Payment Claimed

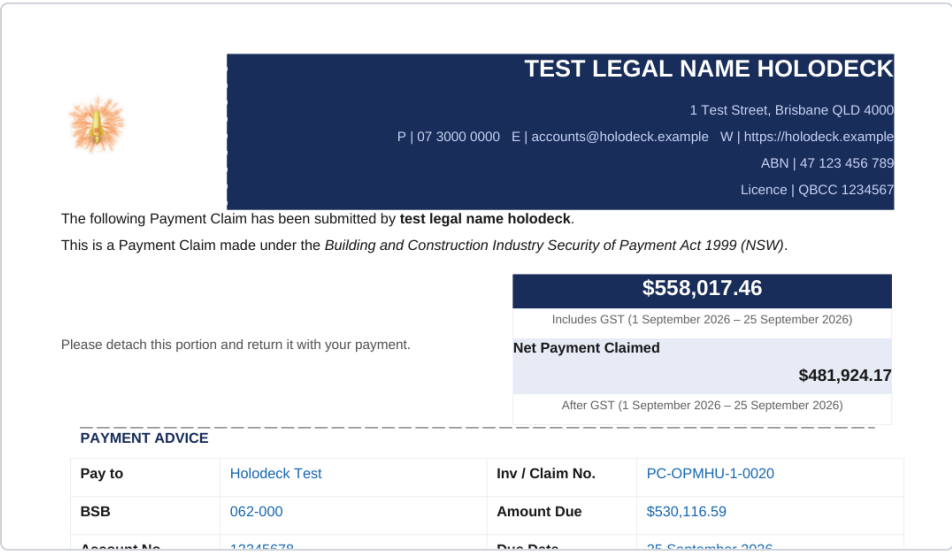
$481,924.17

After GST (1 September 2026 – 25 September 2026)

PAYMENT ADVICE

Pay to	Holodeck Test	Inv / Claim No.	PC-OPMHU-1-0020
BSB	062-000	Amount Due	$530,116.59
Account No.	12345678	Due Date	25 September 2026

Generated PDF HTML template, page 1: the gross claimed, the net payment claimed and the payment advice.



TEST LEGAL NAME HOLODECK

1 Test Street, Brisbane QLD 4000

P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example

ABN | 47 123 456 789

Licence | QBCC 1234567

The following Payment Claim has been submitted by **test legal name holodeck**.

This is a Payment Claim made under the *Building and Construction Industry Security of Payment Act 1999 (NSW)*.

Please detach this portion and return it with your payment.

$558,017.46

Includes GST (1 September 2026 – 25 September 2026)

Net Payment Claimed

$481,924.17

After GST (1 September 2026 – 25 September 2026)

PAYMENT ADVICE

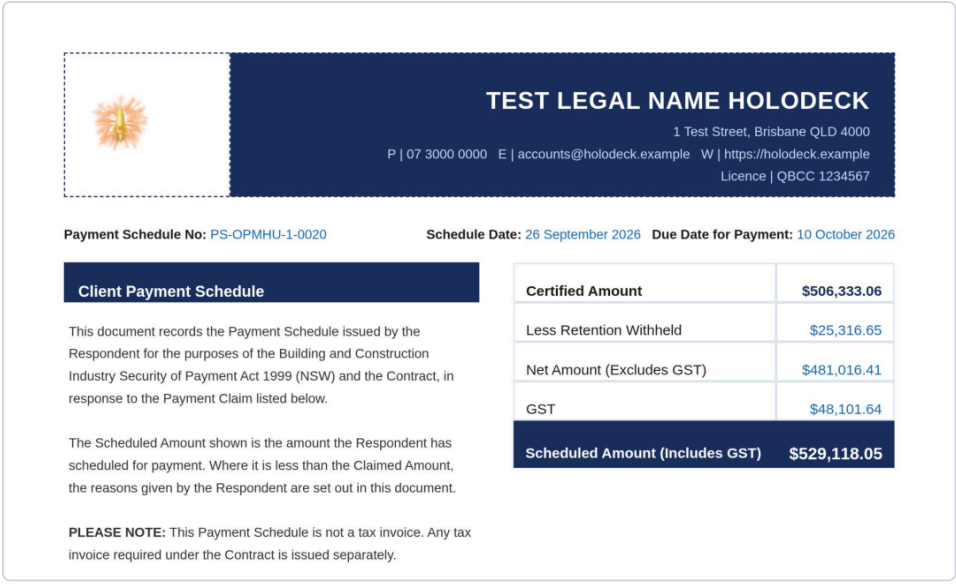
Pay to	Holodeck Test	Inv / Claim No.	PC-OPMHU-1-0020
BSB	062-000	Amount Due	$530,116.59

Word output The same claim from a Word copy (Convert to Word), downloaded as PDF: letterhead, the gross and net amounts and the payment advice. The claim summary table keeps its rows together on the page.

9.2 Client Payment Schedules: Payment Schedule (AU / NZ)

Button (schedule drawer)	What happens
Documents → *Payment Schedule* card → Generate Document	Generate dialog; Download PDF or DOCX. The AU or NZ card follows the head contract's Region, else your company's country.

Header → **Generate & Send Document**	Send wizard. Recipients are typed in step 3. Shown when a Published template exists.



TEST LEGAL NAME HOLODECK
1 Test Street, Brisbane QLD 4000
P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example
Licence | QBCC 1234567

Payment Schedule No: PS-OPMHU-1-0020 **Schedule Date:** 26 September 2026 **Due Date for Payment:** 10 October 2026

Client Payment Schedule

This document records the Payment Schedule issued by the Respondent for the purposes of the Building and Construction Industry Security of Payment Act 1999 (NSW) and the Contract, in response to the Payment Claim listed below.

The Scheduled Amount shown is the amount the Respondent has scheduled for payment. Where it is less than the Claimed Amount, the reasons given by the Respondent are set out in this document.

PLEASE NOTE: This Payment Schedule is not a tax invoice. Any tax invoice required under the Contract is issued separately.

Certified Amount	**$506,333.06**
Less Retention Withheld	$25,316.65
Net Amount (Excludes GST)	$481,016.41
GST	$48,101.64
Scheduled Amount (Includes GST)	**$529,118.05**

Generated PDF The schedule statement under the NSW Act, and the certified and scheduled amounts.

9.3 Invoices (to Client): Tax Invoice

Button (invoice drawer)	What happens
Documents → *Tax Invoice* card → Generate Document	Generate dialog; Download PDF or DOCX.
Actions → **Download as PDF**	Opens Generate on the template the card has selected, so the download matches what is emailed.
Actions → **Generate & Send Document**	Send wizard.

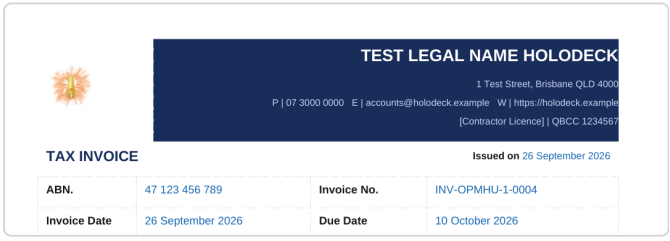


TEST LEGAL NAME HOLODECK
1 Test Street, Brisbane QLD 4000
P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example
Licence | QBCC 1234567

TAX INVOICE Issued on 26 September 2026

ABN.	47 123 456 789	**Invoice No.**	INV-OPMHU-1-0004
Invoice Date	26 September 2026	**Due Date**	10 October 2026

Generated PDF HTML template.



TEST LEGAL NAME HOLODECK
1 Test Street, Brisbane QLD 4000
P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example
[Contractor Licence] | QBCC 1234567

TAX INVOICE Issued on 26 September 2026

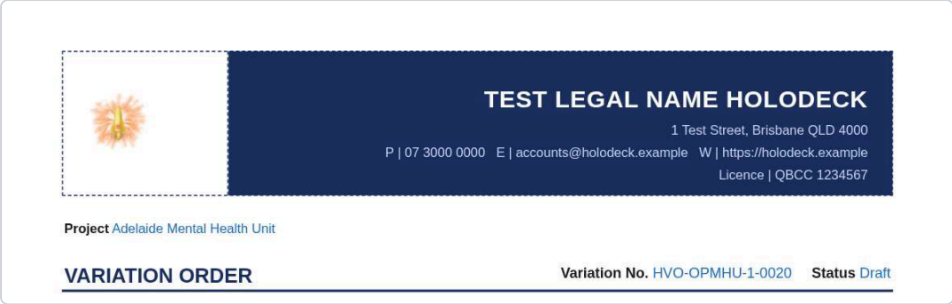
ABN.	47 123 456 789	**Invoice No.**	INV-OPMHU-1-0004
Invoice Date	26 September 2026	**Due Date**	10 October 2026

Word output The same invoice from a Word copy (Convert to Word), rendered on the server with selectable text.

9.4 Variations (VO): Variation Order

Button (variation drawer)	What happens
Documents → *Variation Order* card → Generate Document	Generate dialog. Choose how line items are presented; the variation's attachments and T&Cs file are bound in.

Footer → **Generate & Send Document**	Send wizard. Blocked until internal approval is complete (see the Approvals tab).



Generated PDF Letterhead, project and variation number.

9.5 HC Progress Claim (tax-invoice layout)

The standard *Head Contract Progress Claim* template is a one-page client tax invoice for a progress claim: claim number and date, To/From with both ABNs, project and contract, the claim period, amounts, and your payment details. No register offers it yet, so it can only be previewed in Document Templates (Sample PDF).

10. Subcontract documents

10.1 Subcontract Register: agreement, pack, e-signing

The Overview download, the Agreement tab and the Send modal all start on the same default template (§5), and the Send modal uses the template chosen on the Agreement tab.

Button (subcontract)	What happens
Overview → **Download as PDF**	The subcontract pack from the chosen template. Once executed it becomes *Download PDF (Signed)*.
Agreement tab → template chooser → **Preview Agreement Pack**	Previews the full pack: cover, agreement body and Deep Space's execution (signature) page.
Agreement tab → **Customise & preview…**	Generate dialog for the body; *Use this version* puts it in the pack. Not available for AS 4901 templates.
Agreement tab → **Send to Subcontractor**	Send wizard for the pack, then e-signing. Status becomes *Sent for Execution*, and the subcontractor gets a signature request email with a secure signing link. The signing order follows Company Settings → Subcontract Signing Sequence. If the agreement body can't be generated, the wizard shows the error and can't continue.
Agreement tab → **Resend Signing Link**	Re-sends the signature request while the agreement is awaiting signature.
Agreement tab (Executed) → **Resend Agreement**	Emails a **7-day link to the signed copy on record**. If no signed copy exists it refuses; upload one with *Upload executed copy*.
Documents → *Subcontract Agreement* card	Generate dialog for the body alone (PDF or DOCX). On a subcontract that uses a contract type the card names the contract and its version instead, with **Open Contract details** and no Generate: the contract is produced there.

Overview → **Download as PDF** on a contract type subcontract	Prints the contract from the Contract details tab. There is no template chooser on such a record.

A template that live subcontracts print from can't lose its last Published version: Admin → Document Templates refuses to archive or delete it and says how many subcontracts use it. Publish a new version instead (linked subcontracts follow it), or re-point those subcontracts first (*Edit subcontract → Contract type*). Issued contracts never count.

When every party has signed, the executed agreement email goes out automatically. A template can say it carries its own execution page (*This template carries its own execution page* in the editor). Deep Space then doesn't append its own.



YOUR LOGO

PACIFIC CONSTRUCTION GROUP PTY LTD

Level 12, 333 George Street, Sydney NSW 2000

P | (02) 9210 4400 E | accounts@pacificconstruction.com.au W | www.pacificconstruction.com.au

ABN | 47 123 456 789

Licence | BLD 292847

STRUCTURAL STEEL SUPPLY & INSTALL SUBCONTRACT

DATE CREATED:	12/02/2024	SITE ADDRESS:	Moreau Mews, Applecross WA 6153
CONTRACT COMPANY:	Apex Steel Fabrication Pty Ltd ABN: 88 234 567 901	CREATED BY:	Sarah Nguyen (Pacific Construction Group Pty Ltd)
CONTRACT STATUS:	Issued	EXECUTED:	No
		SIGNED CONTRACT RECEIVED DATE:	—
		ISSUED ON DATE:	15/02/2024
DEFAULT RETENTION:	Retention at 5% of contract value		

SCOPE OF WORKS

CONTRACT DESCRIPTION / SCOPE OF WORKS: Supply, fabrication and installation of structural steelwork to Levels 1–8 inclusive, including connections, fixings, and surface treatment in accordance with drawings S-100 to S-185 and AS 4100.

SCHEDULE OF RATES (HOURLY RATE WORK)

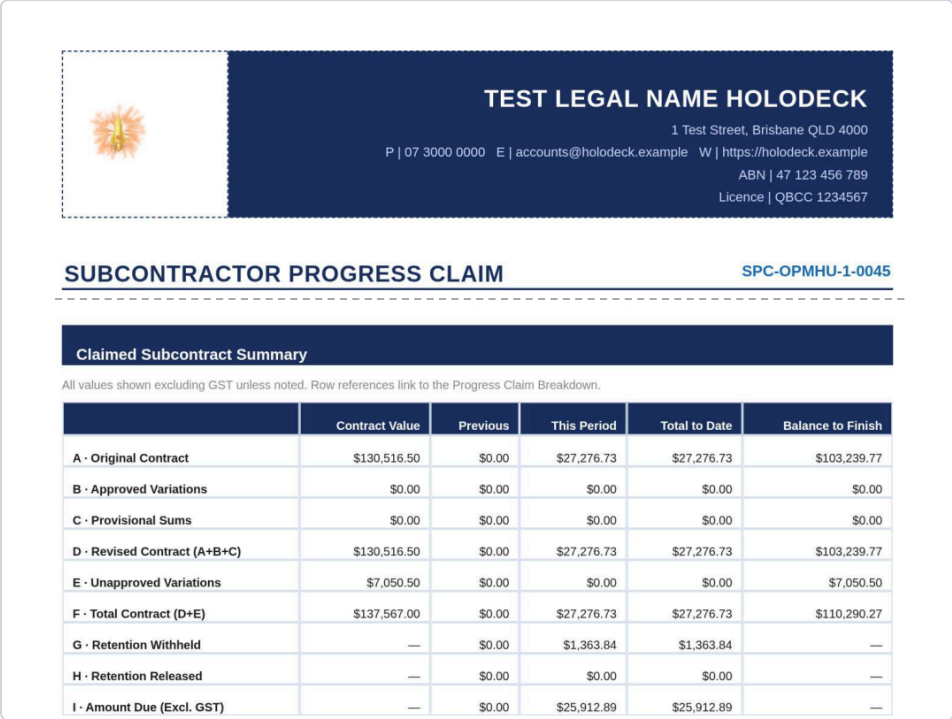
SCHEDULE OF RATES: Not Applicable

ANNEXURE A — CONTRACT PARTICULARS

Sample data The standard agreement body: letterhead, contract header, scope of works and Annexure A.

10.2 Progress Claims from Subcontractors: SC Progress Claim

Button (claim side panel)	What happens
Documents → *SC Progress Claim* card → Generate Document	Generate dialog; claim attachments are bound in.
Header → **Generate & Send Document**	Send wizard. Recipients are typed in step 3.



TEST LEGAL NAME HOLODECK

1 Test Street, Brisbane QLD 4000
P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example
ABN | 47 123 456 789
Licence | QBCC 1234567

SUBCONTRACTOR PROGRESS CLAIM SPC-OPMHU-1-0045

Claimed Subcontract Summary

All values shown excluding GST unless noted. Row references link to the Progress Claim Breakdown.

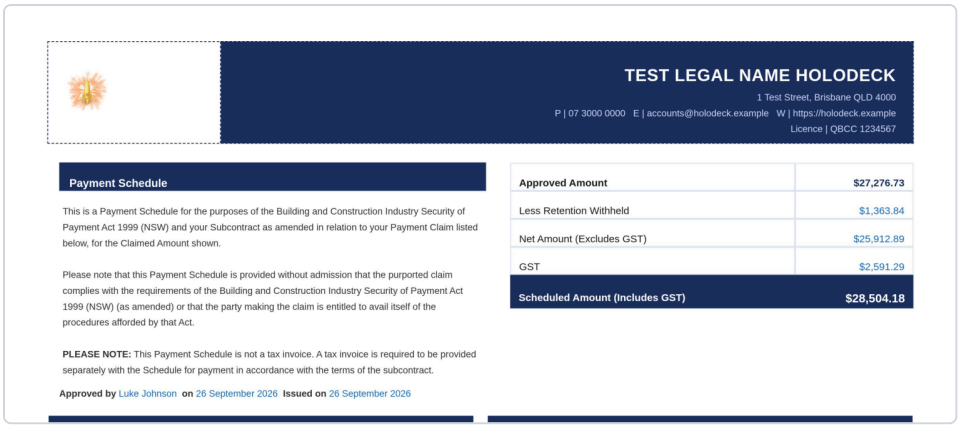
	Contract Value	Previous	This Period	Total to Date	Balance to Finish
A · Original Contract	$130,516.50	$0.00	$27,276.73	$27,276.73	$103,239.77
B · Approved Variations	$0.00	$0.00	$0.00	$0.00	$0.00
C · Provisional Sums	$0.00	$0.00	$0.00	$0.00	$0.00
D · Revised Contract (A+B+C)	$130,516.50	$0.00	$27,276.73	$27,276.73	$103,239.77
E · Unapproved Variations	$7,050.50	$0.00	$0.00	$0.00	$7,050.50
F · Total Contract (D+E)	$137,567.00	$0.00	$27,276.73	$27,276.73	$110,290.27
G · Retention Withheld	—	$0.00	$1,363.84	$1,363.84	—
H · Retention Released	—	$0.00	$0.00	$0.00	—
I · Amount Due (Excl. GST)	—	$0.00	$25,912.89	$25,912.89	—

Generated PDF Title and the claimed subcontract summary (rows A–I); the claim details between them are cropped out.

10.3 Payment Schedules (Issued): SC Payment Schedule, RCTI, BCTI

The Documents tab shows the **Payment Schedule (AU)** or **(NZ)** card by the subcontract's jurisdiction. When the subcontract's tax mode is RCTI or BCTI, the **RCTI** or **BCTI** card is listed first.

Button (schedule drawer)	What happens
Card → Generate Document	Generate dialog; Download PDF or DOCX.
Card → **Attach**	Generates the Published template shown on the card, files it to the CDE and links it on the schedule. An amber hint shows while an RCTI/BCTI hasn't been filed.
Footer → **Generate & Send Document**	Send wizard. Step 1 starts on the subcontract's saved send settings; pick the schedule, RCTI or BCTI.
Footer → Accept → *"Email the payment schedule document to the saved recipients on acceptance"*	On acceptance, emails the document to the subcontract's saved recipients automatically. It uses the template in the saved send settings, else the default.
Footer → **Submit for Approval**	Generates the schedule document now (same template rule). When internal approval completes, the schedule is accepted and the document is emailed to the saved recipients. If the document can't be generated, the schedule is not submitted. With no saved recipients you are offered to set them up, or *Submit anyway* and send manually later.



TEST LEGAL NAME HOLODECK

1 Test Street, Brisbane QLD 4000

P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example

Licence | QBCC 1234567

Payment Schedule

This is a Payment Schedule for the purposes of the Building and Construction Industry Security of Payment Act 1999 (NSW) and your Subcontract as amended in relation to your Payment Claim listed below, for the Claimed Amount shown.

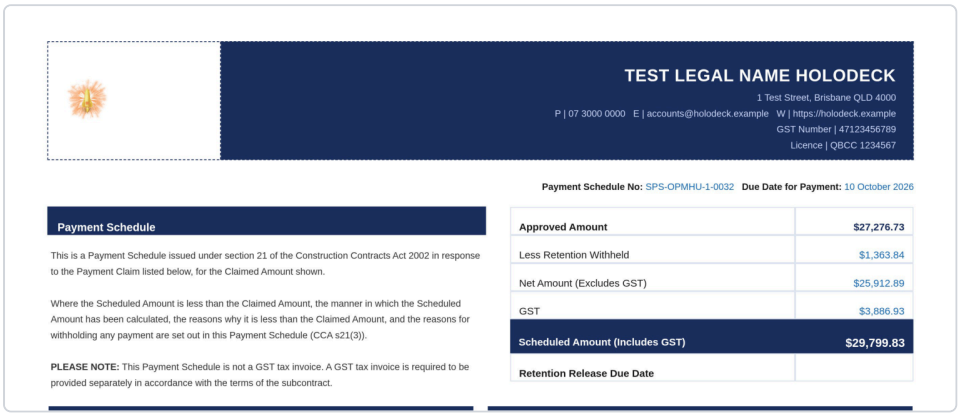
Please note that this Payment Schedule is provided without admission that the purported claim complies with the requirements of the Building and Construction Industry Security of Payment Act 1999 (NSW) (as amended) or that the party making the claim is entitled to avail itself of the procedures afforded by that Act.

PLEASE NOTE: This Payment Schedule is not a tax invoice. A tax invoice is required to be provided separately with the Schedule for payment in accordance with the terms of the subcontract.

Approved by Luke Johnson **on** 26 September 2026 **Issued on** 26 September 2026

Approved Amount	**$27,276.73**
Less Retention Withheld	$1,363.84
Net Amount (Excludes GST)	$25,912.89
GST	$2,591.29
Scheduled Amount (Includes GST)	**$28,504.18**

Generated PDF AU schedule under the NSW Act (landscape). An issued schedule prints “Approved by … Issued on …”; a Draft prints neither.



TEST LEGAL NAME HOLODECK

1 Test Street, Brisbane QLD 4000

P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example

GST Number | 47123456789

Licence | QBCC 1234567

Payment Schedule No: SPS-OPMHU-1-0032 **Due Date for Payment:** 10 October 2026

Payment Schedule

This is a Payment Schedule issued under section 21 of the Construction Contracts Act 2002 in response to the Payment Claim listed below, for the Claimed Amount shown.

Where the Scheduled Amount is less than the Claimed Amount, the manner in which the Scheduled Amount has been calculated, the reasons why it is less than the Claimed Amount, and the reasons for withholding any payment are set out in this Payment Schedule (CCA s21(3)).

PLEASE NOTE: This Payment Schedule is not a GST tax invoice. A GST tax invoice is required to be provided separately in accordance with the terms of the subcontract.

Approved Amount	**$27,276.73**
Less Retention Withheld	$1,363.84
Net Amount (Excludes GST)	$25,912.89
GST	$3,886.93
Scheduled Amount (Includes GST)	**$29,799.83**
Retention Release Due Date	

Emailed attachment The NZ schedule as received by email: issued under section 21 of the Construction Contracts Act 2002, with GST numbers.



YOUR LOGO

PACIFIC CONSTRUCTION GROUP PTY LTD

Level 12, 333 George Street, Sydney NSW 2000

P | (02) 9210 4400 E | accounts@pacificconstruction.com.au W | www.pacificconstruction.com.au

Licence | BLD 292847

RECIPIENT CREATED TAX INVOICE

Approved by James Harrington Issued on 15 March 2024

ABN.	47 123 456 789	Invoice No.	INV-2024-0142
Invoice Date	15 March 2024	Approved By	James Harrington

Subcontractor	Allied Electrical Services Pty Ltd	ABN.	53 987 654 321
Job	Westfield Sydney Expansion — Tower B	Claim No.	Claim #7
Agreement No.	SC-2023-0087	Vendor Ref	PO-2024-00381
Agreement	Electrical rough-in, switchboard installation and final fit-off — Levels 4–12		

Revised Contract Works and Unapproved Variations	29 February 2024	$2,630,500.00
Total Progress Approved	Original contract works	$2,450,000.00
	Variations	$180,500.00
Less Retention		$131,525.00
Net Payable		$215,340.00
Less Previous Payments		$1,248,750.00
This Payment Authorised		$215,340.00
Plus GST		$21,534.00
PAYMENT AMOUNT		$236,874.00

Sample data The standard RCTI: your details and ABN, invoice number and dates, the subcontractor, and the payment ladder.

10.4 Subcontract Variations: Subcontract Variation

Button (variation sidebar)	What happens
Documents → *Subcontract Variation* card → Generate Document	Generate dialog; Download PDF or DOCX.
Generate & Send Document	Send wizard. Blocked while the variation is a Draft that still needs internal approval.



TEST LEGAL NAME HOLODECK

1 Test Street, Brisbane QLD 4000

P | 07 3000 0000 E | accounts@holodeck.example W | https://holodeck.example

ABN | 47 123 456 789

SUBCONTRACT VARIATION SVO-OPMHU-1-0011

Status	Submitted
Variation type	Design Change
Date created	26 September 2026
Tax mode	Invoice

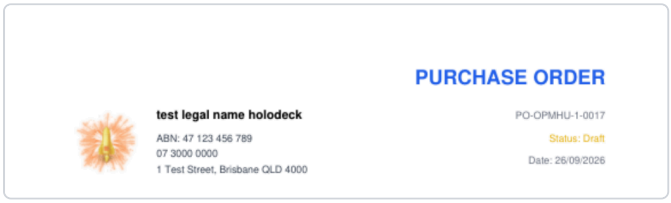
Subcontract & project

Generated PDF Title, status and variation type. Further down it prints the variation items, the statutory wording and a statutory declaration under the subcontract state's declarations act.

11. Purchase orders

Button	What happens
PO side panel → **Download as PDF ▾**	Menu of the default (Assigned, or newest published), pinned templates, the *System default layout* and *Use a different template (N)*. After e-signing it becomes *Download as PDF (Signed)*.
PO side panel → **Send to Supplier** (approved POs) or **Resend**	Generate & Send Document wizard, starting on the default. Step 1 shows the actual PDF and re-renders when you change template. *Customise & view…* opens the Generate dialog. The supplier's email is pre-filled. The send record names the template or System default layout used.
Register row → paper-plane *Send document*	The same wizard, from the list (approved POs only).
E-Signature → **Send for E-Signature**	Sends the PO for signature, using the template chosen in the panel's Download as PDF menu.

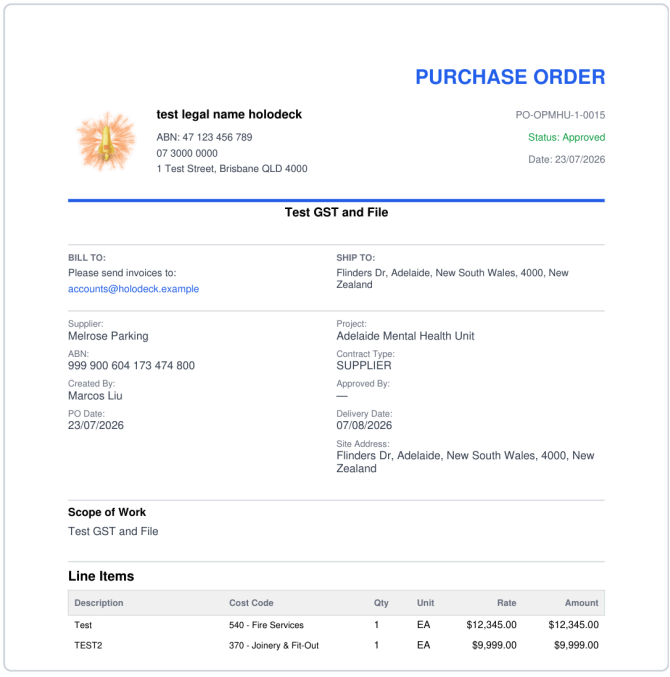
PO attachments are bound in at the end, unless the template is set to skip them. GST follows the project's jurisdiction (§6).


PURCHASE ORDER

test legal name holodeck
ABN: 47 123 456 789
07 3000 0000
1 Test Street, Brisbane QLD 4000

PO-OPMHU-1-0017
Status: Draft
Date: 26/09/2026

Downloaded PDF System default layout.


PURCHASE ORDER

test legal name holodeck
ABN: 47 123 456 789
07 3000 0000
1 Test Street, Brisbane QLD 4000

PO-OPMHU-1-0015
Status: Approved
Date: 23/07/2026

Test GST and File

BILL TO:
Please send invoices to:
accounts@holodeck.example

SHIP TO:
Flinders Dr, Adelaide, New South Wales, 4000, New Zealand

Supplier: Melrose Parking
ABN: 999 900 604 173 474 800
Created By: Marcos Liu
PO Date: 23/07/2026

Project: Adelaide Mental Health Unit
Contract Type: SUPPLIER
Approved By: —
Delivery Date: 07/08/2026
Site Address: Flinders Dr, Adelaide, New South Wales, 4000, New Zealand

Scope of Work
Test GST and File

Line Items

Description	Cost Code	Qty	Unit	Rate	Amount
Test	540 - Fire Services	1	EA	$12,345.00	$12,345.00
TEST2	370 - Joinery & Fit-Out	1	EA	$9,999.00	$9,999.00

Emailed attachment A PO sent to the supplier with the System default layout: bill-to, ship-to, supplier, scope and line items.

12. Troubleshooting

What you see	Why, and what to do
"Company Settings is incomplete"	A value this document prints is blank. Complete it in Admin → Company Settings (the message names it and links there), or ask an administrator. See §6.

RCTI/BCTI refused: the schedule is still Draft	Issue the payment schedule first; a tax invoice is never produced from a Draft schedule.
A value prints blank	The record or Company Settings has no value for it. Fill it on the record, or type it in the Generate dialog for this one document. In the editor's Sample preview, a `[name]` chip means the variable doesn't exist for this type.
Amber notice at step 3 and Send disabled	The email template uses a `${name}` nothing fills for this record. Pick another email template, use the default system email, or fix the typo in Admin → Email Template Library.
"Could not generate the PDF … Nothing was sent."	The document failed to render, so nothing was emailed, served or attached. Try Generate on the same template to see the problem. For a Word template, check the file in the workbench preview.
My template isn't offered	Pickers list Published templates only. Publish it. To make it the default, Assign it; to show it up front, Add to picker. Otherwise it sits behind *Use a different template (N)*.
Documents use a different template from the one I edited	Another template is Assigned for the type, or yours isn't the newest published. Assign yours.
Publishing changed every document	Nothing was assigned, so the newest Published template became the default. Assign the one you want.
Generate & Send is greyed out	The claim or variation is awaiting internal approval (Approvals tab).
Wrong or no email template in step 2	Email templates are matched on category and type, and must be Active. See the *Email Templates* guide.
HTML PDF text can't be selected	Expected: HTML templates produce page images. Use a Word template (Convert to Word) where selectable text matters.
"N subcontract(s) use this Document Template as their agreement" when archiving or deleting	Live subcontracts print from it and this is the family's last Published version. Publish a new version instead, or re-point those subcontracts (Edit subcontract → Contract type), then archive. Issued contracts never count.
Linking a template to a contract type is refused: subcontracts use it directly	A contract master is kept out of the ordinary pickers, so the subcontracts linked to it would lose their template. Re-point them first, or link a copy of the template (Clone & Edit) to the contract type.
A subcontract's picker says *Linked to this subcontract*, or that the linked template is no longer available	The first is the subcontract's own approved document; it follows that template's versions. The second means the linked template was archived with no Published version left, so the workspace default prints: re-point the subcontract (Edit subcontract → Contract type).
A Word master won't publish, or *Publish* is disabled	It doesn't match a Published contract type that prints with it; the workbench lists each problem under *Contract types using this master*. Fix the Word file, or publish it with a matching new contract type version (§4.5).
I changed a copy of a master and contracts didn't change	Clone & Edit makes a copy no contract type uses. Open the master itself, click *New version*, replace the file and publish (§4.4).
Resend Agreement refuses	No signed copy is on record. Upload the executed agreement, then resend.

13. Quick reference

Document	Email template Type	Generate	Send	Automatic
Progress Claim PDF	`head_contract_claim_pdf`	✓	✓	Serve
HC Payment Schedule AU / NZ	`head_contract_payment_schedule_pdf` / `_nz`	✓	✓	—
HC Tax Invoice	`head_contract_tax_invoice`	✓	✓	—
Variation Order	`head_contract_variation`	✓	✓	—
HC Progress Claim (tax-invoice layout)	`head_contract_progress_claim`	preview only	—	—
Subcontract Agreement	`subcontract_agreement`	✓	✓ + e-sign	Executed email
SC Progress Claim	`subcontract_claim_pdf`	✓	✓	—
SC Payment Schedule AU / NZ	`subcontract_payment_schedule_pdf` / `_nz`	✓ + Attach	✓	Accept, approval
RCTI / BCTI	`subcontract_rcti` / `subcontract_bcti`	✓ + Attach	✓	—
Subcontract Variation	`subcontract_variation`	✓	✓	—
Purchase Order	`purchase_order`	✓	✓ + e-sign	—

Related guides: *Out-of-the-box Document Templates* (the standard set) · *Word Document Templates: Customer Guide* (tagging Word files) · *Document Template Variable Dictionary* (every variable) · *Email Templates* (covering emails).