

Before the visit: ask for useful information

Copy and adapt this message. Confirm attendance terms before sending. Photos support preparation; they cannot establish safety, diagnose hidden defects or confirm the exact parts needed.

Customer message

Thanks for contacting [business] about [reported problem]. Please send a wide photo of the accessible work area and a readable model label, if visible from a safe position. Tell us when the problem started, your suburb, access arrangements and who can authorise the work.

Only photograph what is safely visible. Do not open electrical enclosures, remove covers, touch wiring, climb, enter pits, disturb suspected asbestos or investigate a suspected gas leak. For immediate danger, seek urgent help rather than waiting for this enquiry.

Our attendance and assessment charge is [total price and GST treatment]. It includes [scope and time]. Parts, repairs and additional work are [terms]. We will confirm availability and explain the proposed work and price before asking for approval.

Job type	Useful information
Electrical	Existing visible labels, reported symptoms and safe ground-level access photo. Inspection and testing remain necessary.
Hot water / plumbing	Visible model label, reported fault and access to the unit. Do not operate valves or dismantle equipment for a photo.
Rental	Managing agent reference, approval limit, access consent and existing reports. Keep personal documents out of photos.

Optional AI extraction

Not enabled in the launch tools. Any later image service must disclose the receiving provider, obtain consent and limit output to visible observations requiring trade review. Never use it to certify compliance, identify asbestos, set a price or confirm a booking.

Record a proposed change

Use this administrative record alongside the agreed quote. It does not replace a required contract variation notice. A typed name or drawn signature alone does not verify authority or informed approval.

Job and authority	Complete before proposing work
Business / licence reference	_____
Job / original quote / date	_____
Customer / authorised agent	_____
Proposed change and reason	_____ _____
Alternatives and work that can wait	_____
Timing effect / revised completion	_____

Price basis	Amount / confirmation
GST-registered? Prices inclusive or exclusive?	_____
Additional charge / omitted-work credit	_____
Net change / GST / revised total	_____

Approval evidence - record after the response

Response: pending / accepted / declined

Responding person and authority: _____

Date/time: _____

Actual reply or signed document reference: _____

Contract type, exclusions and the applicable notice procedure matter. Home Warranty thresholds and major-contract requirements are separate questions. Do not use A\$20,000 as a universal permission to proceed without a contract.

Source: CAV - Deposits and payments; check the current contract and regulator guidance.

Rental records: use the right trigger

From 13 October 2026, rental providers must retain evidence of minimum-standard compliance. The standards have 15 categories. This worksheet is an index to evidence, not a whole-property pass certificate.

Record	What to capture
Gas and electrical safety checks	Keep separate qualified-trade reports and check dates. Two-yearly requirements now cover all rental properties; gas checks apply where relevant gas installations exist.
Renter requests a safety-check record	Record when the rental provider receives the written request. The copy is due within seven days of that request, not seven days from inspection.
Before draughtproofing	Check the separate gas-check requirement. A prior routine check or photo is not automatic clearance.
2027 upgrades	Different standards have different dates, triggers and exemptions. For example, the hot-water rule begins 1 March 2027 when a system fails beyond repair; it is not a blanket replacement date.

Evidence index

Property / internal reference: _____

Electrical check date and report: _____

Gas check date and report: _____

Written request received: _____

Copy sent to renter / evidence: _____

Pre-draughtproofing check reference, where required: _____

Sources: CAV rental changes; CAV minimum standards; ESV residential tenancy; CAV phased energy standards.

Close the paperwork loop

The reviewed workbook separates lodgement, delivery and deadlines. Completion is a record status; it never proves the work is safe or technically compliant.

Task	Use the evidence
Plumbing certificates	Where a certificate is required, track lodgement and customer issue separately. BPC specifies five days from completion for lodgement and customer issue, with a termination provision for customer issue. Some work requires a certificate regardless of value.
Purchased VBA360 certificates	Enter the expiry shown in the portal. Legacy purchases, transitional dates and extensions mean a blanket purchase +12 months formula is insufficient.
Electrical certificates	Do not use a generic five-day countdown. Prescribed work has inspection and distribution stages. ESV pages use differing deadline descriptions: enter the applicable verified date and retain its source.
Customer handover	Keep the original certificate, portal receipt and evidence of the customer copy. Lodging late must remain visible as late.

Use with ServiceM8 or your current system

Attach the reviewed customer message, change proposal, approval evidence and certificate records to the job. Use the regulator portal to lodge certificates. These files do not create official certificates, install forms automatically or send reminders.

In ServiceM8, purchased Form Store forms can be used on every plan. Custom forms and Asset Management require the appropriate higher plan. Validate your intended fields and workflow in a trial.

Keep your records

The browser tools save only when you choose to remember work or download a backup. Shared devices and exported files need appropriate handling. Save a copy before clearing browser data. No server backup or automatic email reminder is provided.

Sources: BPC plumbing compliance certificates; ESV prescribed and non-prescribed work; ServiceM8 pricing.