certify.nz

User guide for IQPs

How to set up certify.nz, add buildings, inspect specified systems, record defects and issue reports owners and councils can check online.

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Contents

1. Getting started
2. Set up your account and company
3. Add a building and its specified systems
4. Run an inspection on site
5. Record defects and track repairs
6. Review, issue and send a report
7. How owners and councils check a report
8. Invite your team and customise checklists
9. Plan, billing and invoices
10. Help and troubleshooting

Screenshots use the practice building, which holds sample data only. The latest version of this guide is always at certify.nz/help.

SECTION 1

Getting started

> certify.nz is BWOF inspection software for IQPs. You add each building from its compliance schedule, inspect its specified systems on a phone, tablet or laptop, and issue reports the building owner and council can check online.

1. Sign up

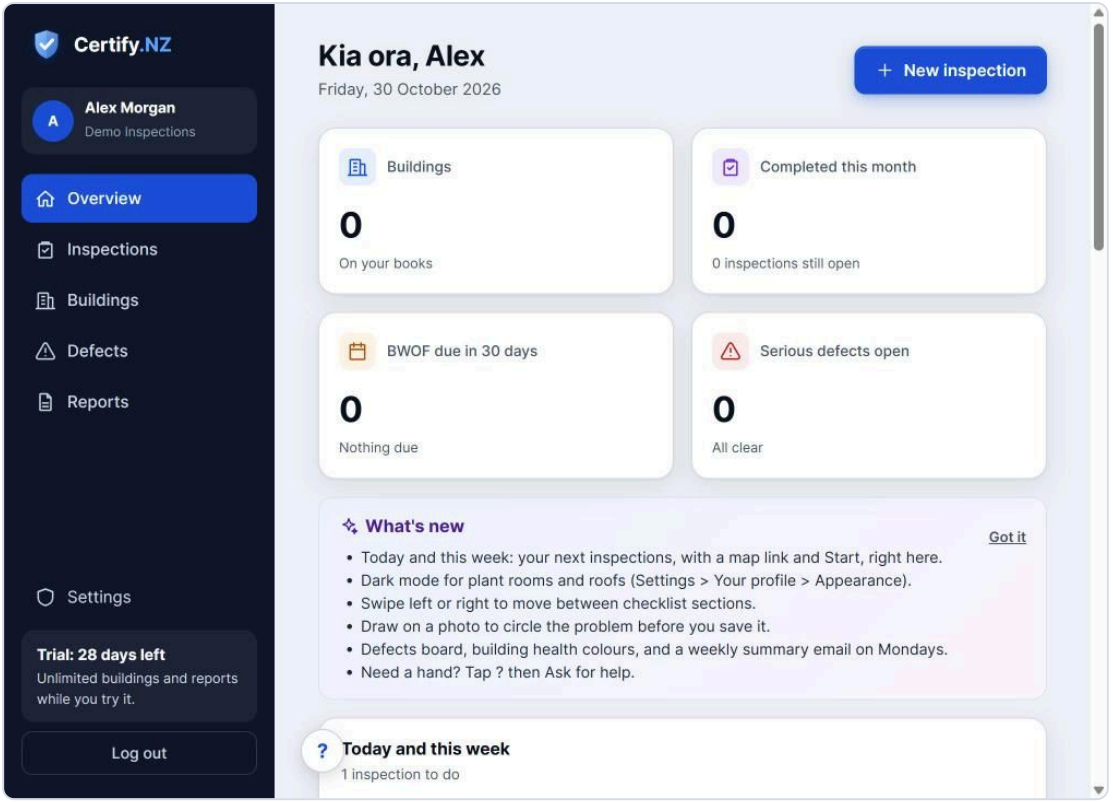
1. Go to certify.nz/app/signup.
2. Enter your name, email and a password.
3. Choose how you work: *I inspect and issue my own reports*, or *I don't inspect: I run the office, bookings or reports*.
4. You start a 30-day free trial. No card is needed to start.

2. Try the practice building

Every new account gets **SAMPLE – Practice Tower**. Nothing in it is real. Its reports are watermarked SAMPLE and are never emailed, so you can try every button.

1. Open **Buildings** and tap **SAMPLE – Practice Tower**.
2. Tap **Start inspection** and work through the lift checklist.
3. Mark a check as a defect, complete the inspection, then review the sample report.
4. When you are done, delete the practice building from the bottom of its page.

3. Find your way around



The Overview page: buildings, inspections completed this month, BWOFs due in 30 days and serious defects open.

- **Overview:** your day at a glance, plus what is due this week.
- **Inspections:** annual inspections and re-inspections.
- **Buildings:** every building, its compliance schedule and its specified systems.
- **Defects:** everything that still needs fixing, across all buildings.
- **Reports:** every issued report, with its date, inspector and verify code.
- **Settings:** your details, your company, your team, checklists and your plan.

> **Tip:** Tap **?** at the bottom of any screen for tips about that page, or to ask for help.

Questions

Do I need a card to start the trial?

No. The 30-day trial starts when you sign up. You only add a card when you choose a plan.

Can I use certify.nz on my phone?

Yes. It works in the browser on phones, iPads, Surface Pro and laptops, and checklists keep working without signal.

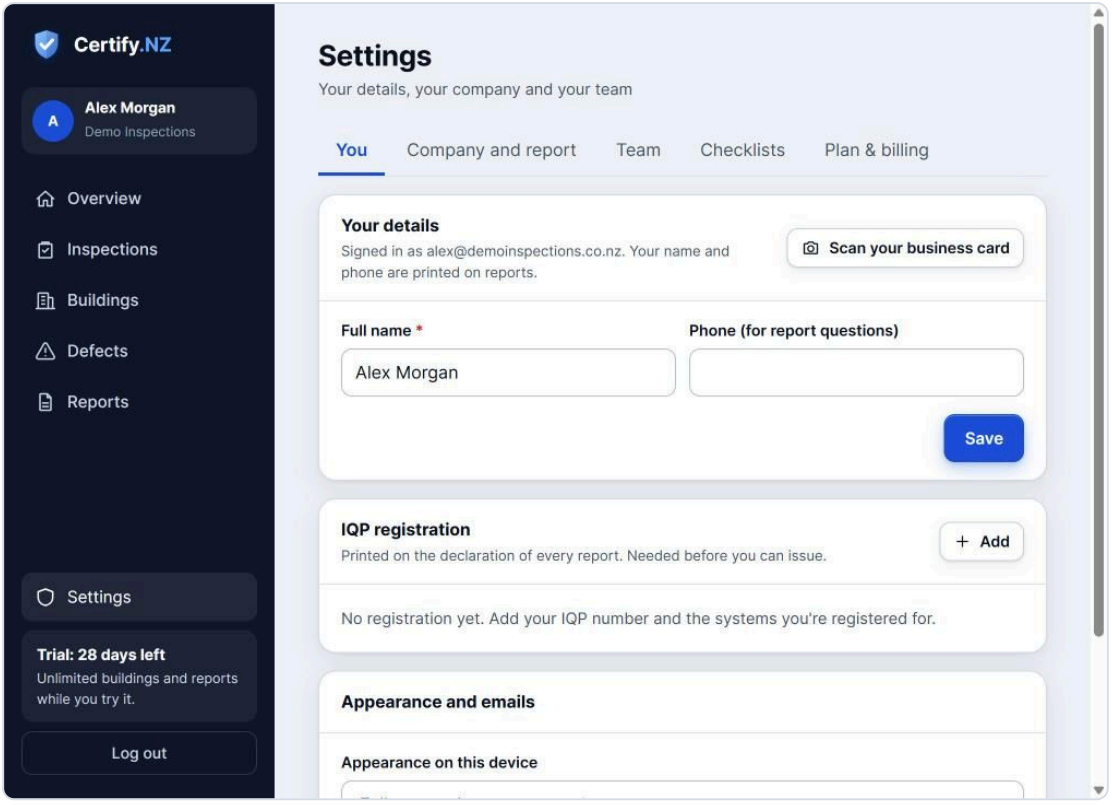
SECTION 2

Set up your account and company

Before you issue a real report, add your name and phone, your IQP registration number, and your company details. All three print on every report.

Your details and IQP registration

1. Go to **Settings → You**.
2. Check your **Full name** and add a **Phone** number for report questions. Tap **Save**.
3. Under **IQP registration**, tap **Add**. Enter your IQP number and the specified systems you are registered for.



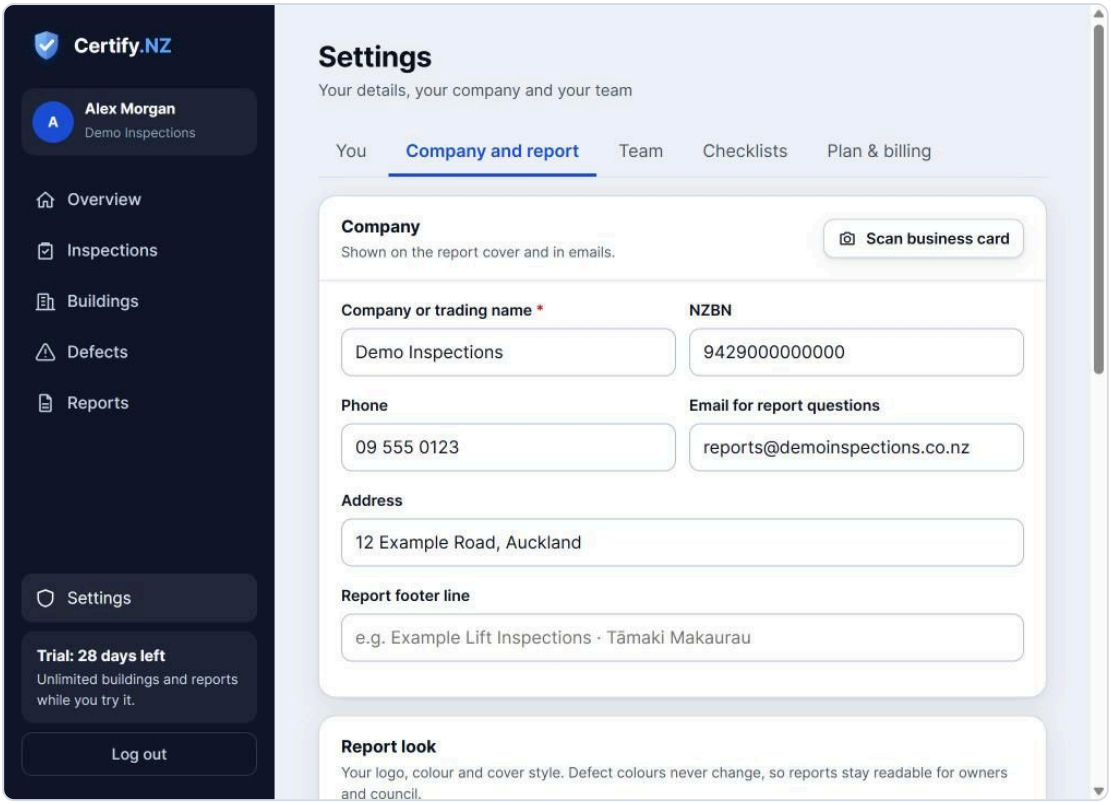
Settings → You. Your IQP registration is printed on the declaration of every report and is needed before you can issue one.

Tip: Scan your business card fills your details from a photo. You check everything before saving.

Company and report look

1. Go to **Settings → Company and report**.
2. Enter your company or trading name, NZBN, phone, an email for report questions, and your address.

3. Under **Report look**, upload your logo, pick a brand colour and choose a cover style.
4. Tap **Save company**.



Company details print on the report cover and in emails. Defect colours never change, so reports stay readable for owners and council.

AI help (optional)

On the same tab you can turn on AI help. It reads photos and compliance schedules, tidies notes, fills checks from spoken notes and drafts summaries. You always see and confirm what it suggests.

Questions

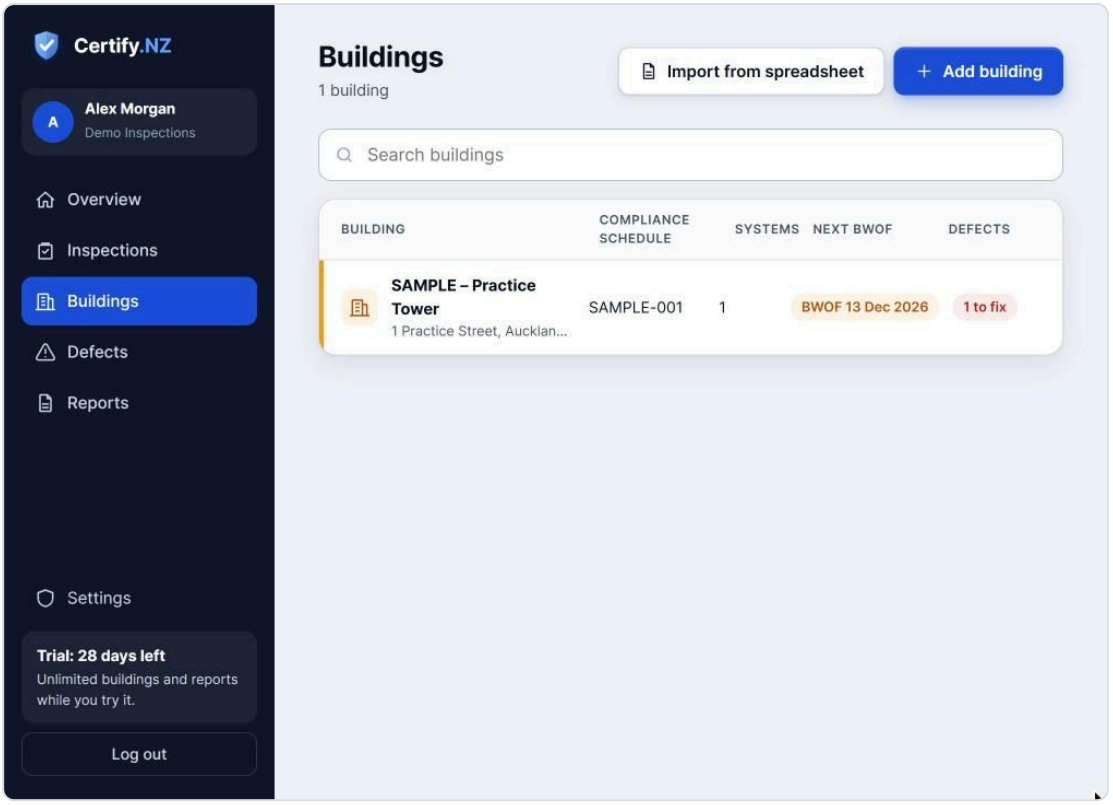
Why can't I issue a report?

Add your IQP registration number in **Settings → You**. It is printed on the declaration, so a real report can't be issued without it.

SECTION 3

Add a building and its specified systems

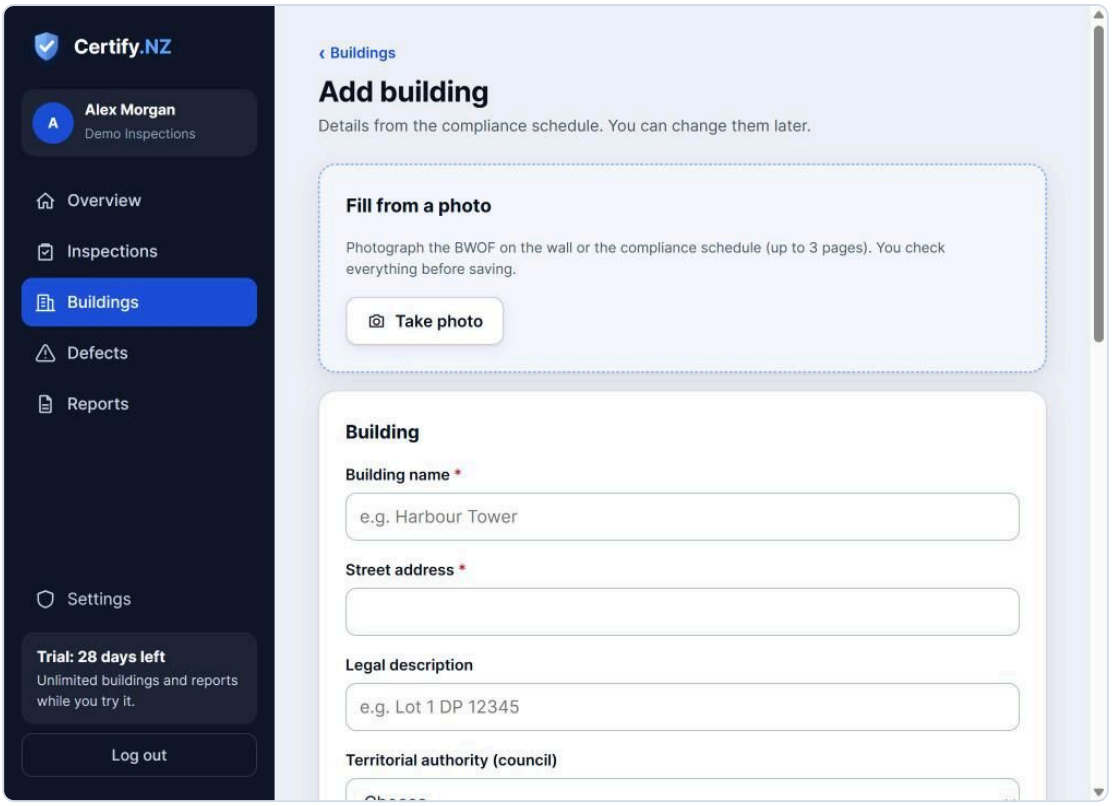
Each building in certify.nz mirrors its compliance schedule: the schedule number, BWOF anniversary, council and the specified systems it lists.



The Buildings list shows each building's compliance schedule number, systems, next BWOF and open defects.

Add a building

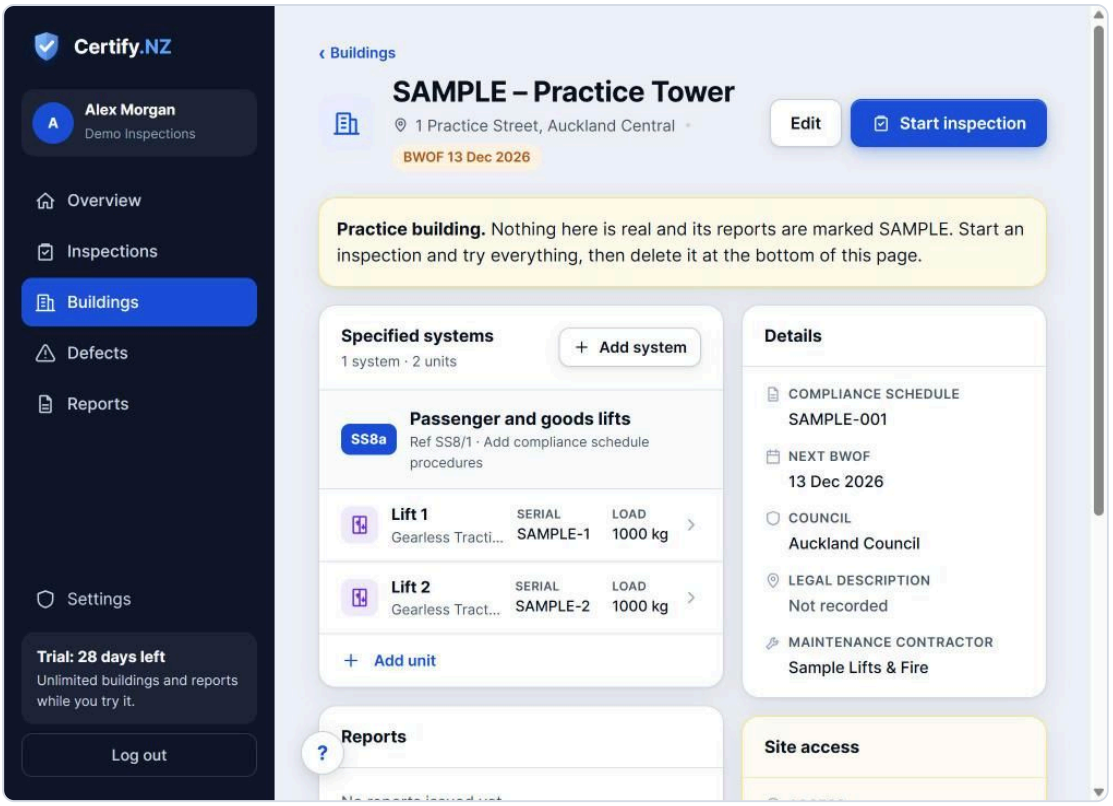
1. Go to **Buildings** and tap **Add building**.
2. Optional: tap **Take photo** and photograph the BWOF on the wall or the compliance schedule (up to 3 pages). The details are filled in for you to check.
3. Enter the building name, street address, legal description and council.
4. Under **Compliance schedule**, enter the number, the issue date and the BWOF anniversary (it defaults to the issue date).
5. Add the maintenance contractor and any access notes. Codes and keys are encrypted: only IQPs and admins can see them, and each view is logged.
6. Tap **Save building**.



Add building. Fill from a photo, or type the details from the compliance schedule.

Add specified systems and units

1. On the building page, tap **Add system** and choose each specified system on the compliance schedule.
2. For systems with several units (such as lifts), tap **Add unit** for each one. Reports then show every unit separately.
3. Add the owner or building manager under **Contacts**. Reports are emailed to them from the report page.



A building page: specified systems and units on the left, compliance schedule details on the right.

Bring your whole client list across

Tap **Import from spreadsheet** on the Buildings page. Save your spreadsheet as CSV first: in Excel, choose File → Save As → CSV UTF-8.

Questions

What if a building has a system you don't inspect?

Add only the systems you inspect. Each specified system gets its own checklist and its own section of the report.

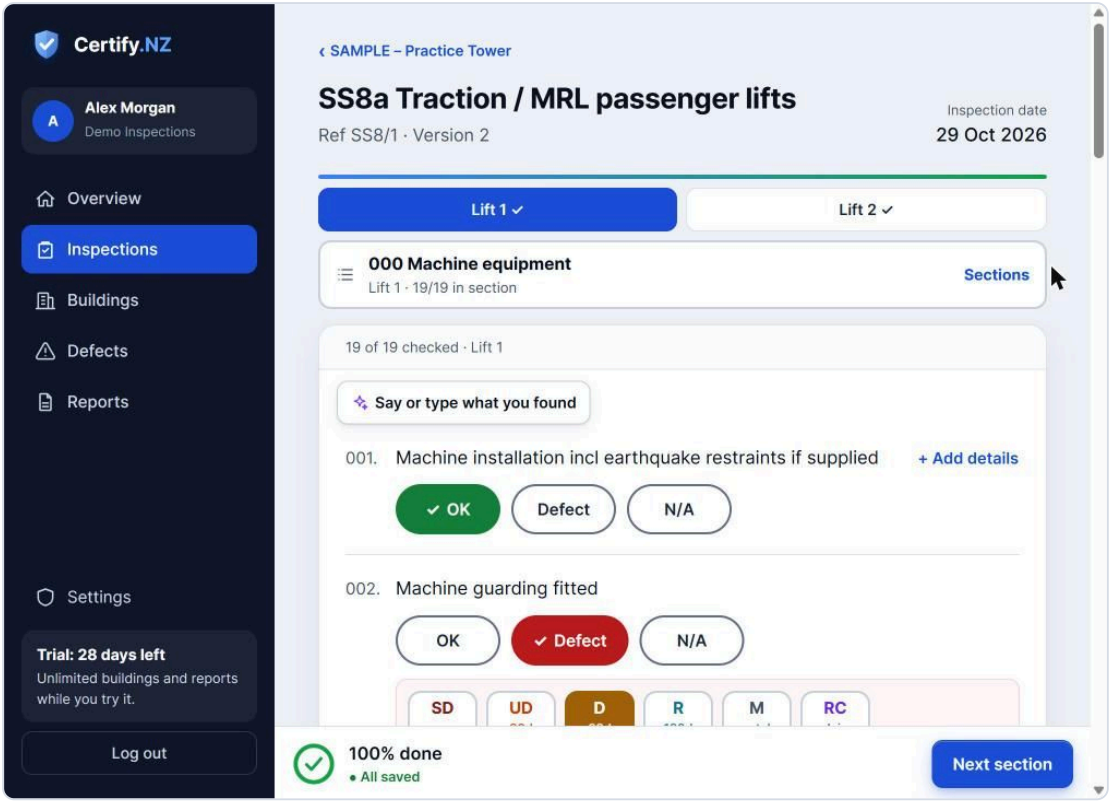
SECTION 4

Run an inspection on site

> Open a building and tap **Start inspection**. Each specified system has its own checklist, split into sections. Everything saves on your device first and syncs when there is signal.

Work through the checklist

1. Open the building and tap **Start inspection**. (From **Inspections → New inspection** you choose the building first.)
2. For each check, tap **OK**, **Defect** or **N/A**.
3. Where a check asks for a **Reading** (such as brake lining thickness in mm), enter it, or tap **Read from photo**.
4. Tap **+ Add details** to add a note to any check.
5. Tap **Next section** to move on, or **Sections** to jump. On a phone you can also swipe left or right.



A checklist section. Systems with several units, like lifts, have a tab for each unit.

Save time

- **Mark rest OK:** answer one check in a section, then tap **Mark rest OK** to mark the rest of that section OK. An **Undo** button appears for 8 seconds in case you tapped it by mistake.

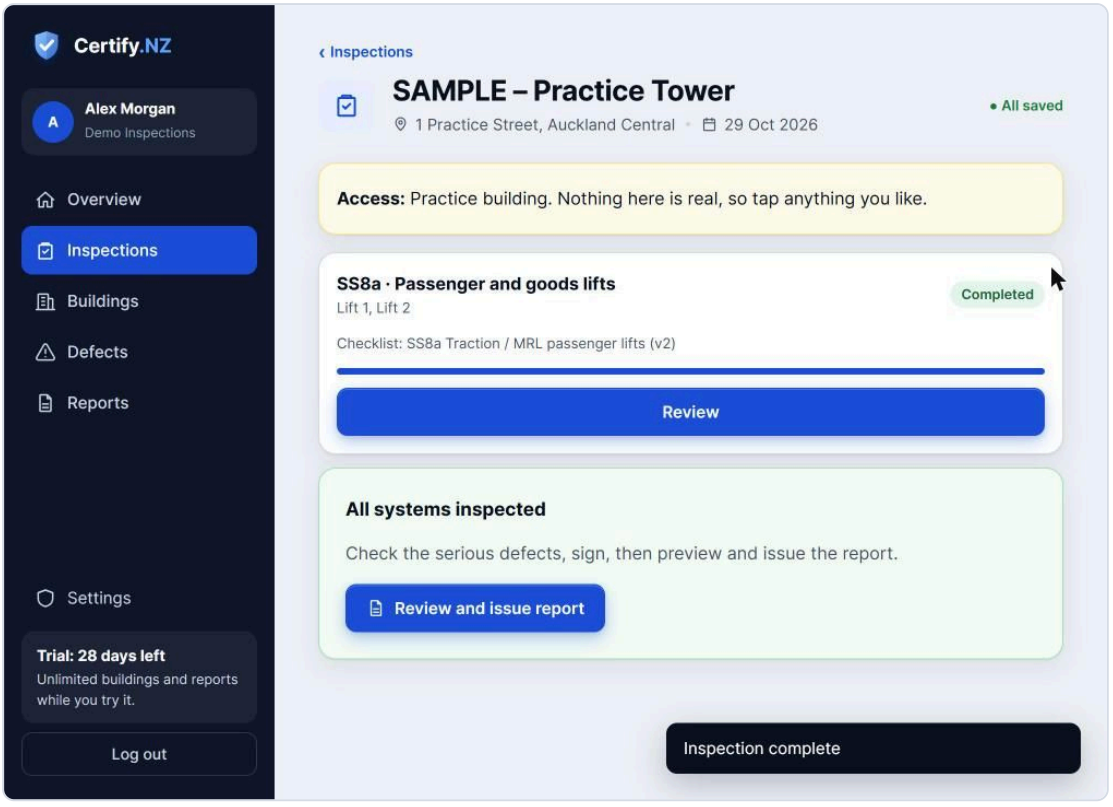
- **Say or type what you found:** describe the section in your own words and certify.nz fills in the checks for you to confirm.
- **Last inspection:** on a repeat inspection, previous answers are shown so you can confirm they are **Still correct**.

No signal? Keep going

Checks, notes and photos save on your phone first. The bar at the bottom shows **All saved** once everything has synced. If you open an inspection without signal, you see the copy saved on that device.

Complete the inspection

When every system reaches 100%, tap **Complete inspection**. You can still reopen it to edit; the change is recorded.



All systems inspected. The next step is to review and issue the report.

Questions

Do I need signal on site?

No. Everything saves on the device and syncs when there is signal. Wait for **All saved** before you close the app.

Can I edit a completed inspection?

Yes. Open it and tap **Reopen to edit**. The change is recorded.

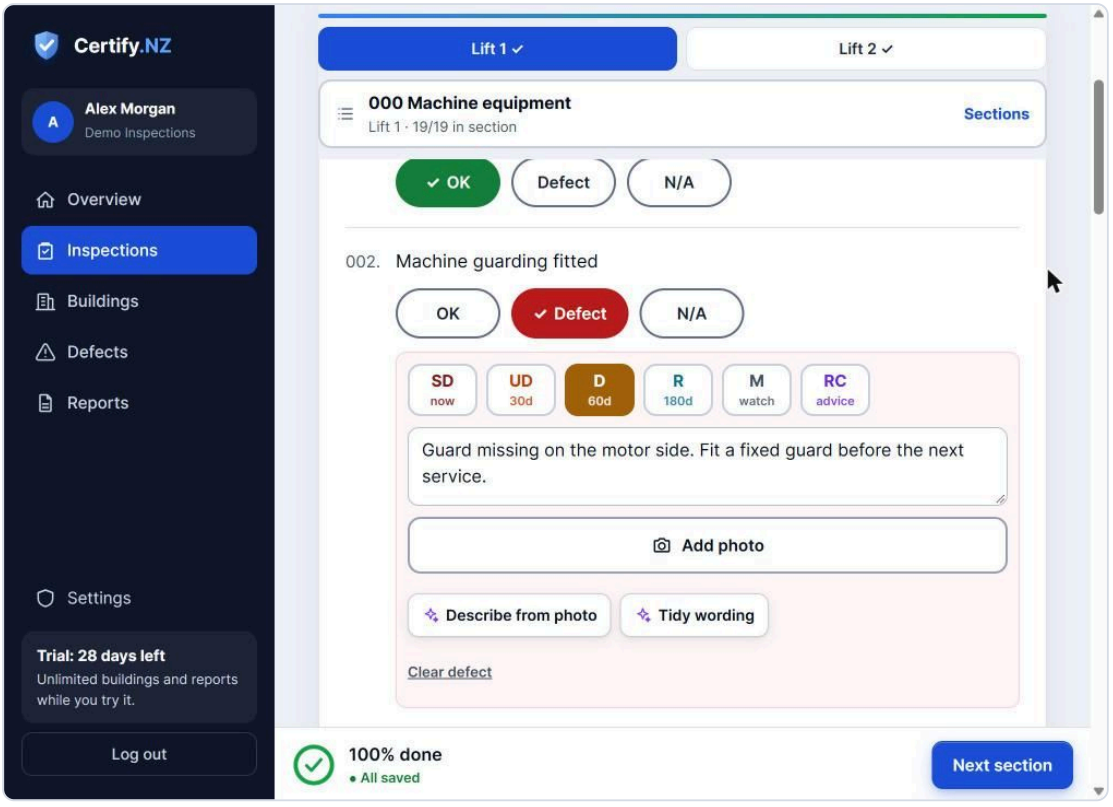
SECTION 5

Record defects and track repairs

> Tap **Defect** on any check, choose a code, describe what is wrong and add a photo. The code sets the due date. Serious defects (SD) mean the Form 12A is withheld until they are fixed.

Record a defect

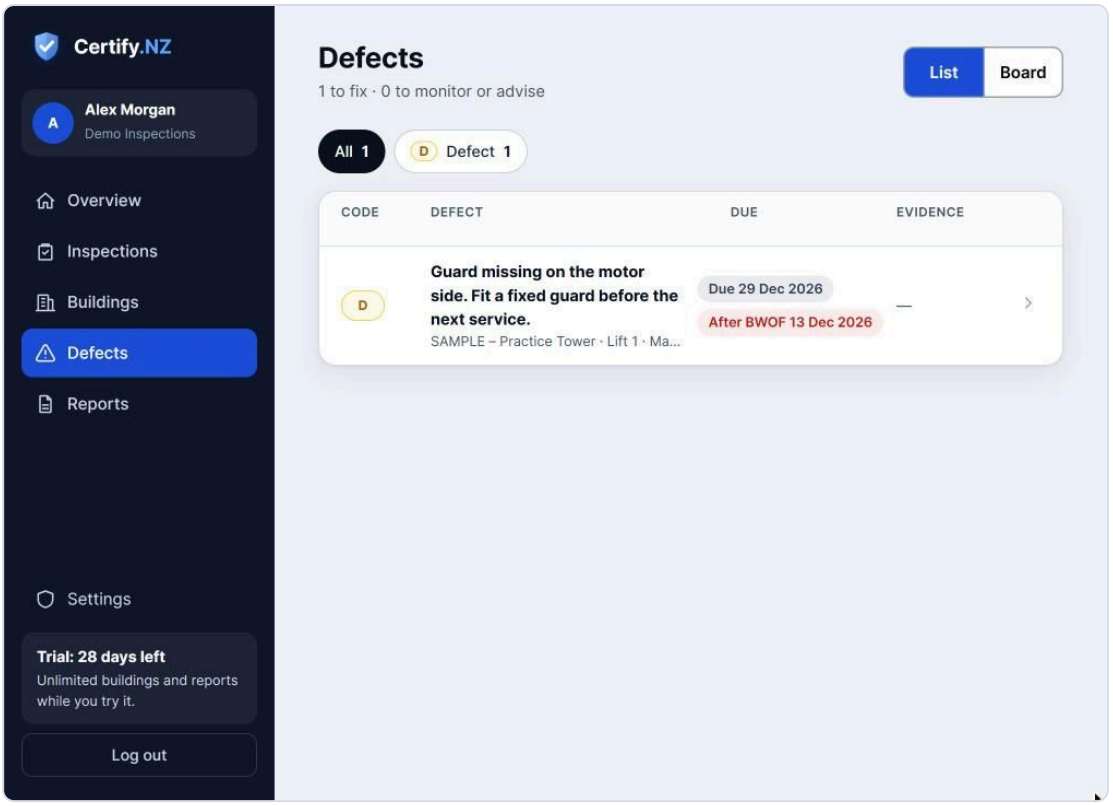
1. On the check, tap **Defect**.
2. Choose a code. Each code shows its timeframe: **SD** now, **UD** 30 days, **D** 60 days, **R** 180 days, **M** watch, **RC** advice.
3. Describe what is wrong. This is the defect description printed on the report.
4. Tap **Add photo**. You can draw on a photo to circle the problem before you save it.
5. Optional: **Describe from photo** drafts the description, and **Tidy wording** cleans up your note.



A defect with code D (due in 60 days) and its description.

Track defects

The **Defects** page lists every open defect across all your buildings, with its due date and any evidence of repair. Switch between **List** and **Board**, and filter by code.



Each defect shows its due date and, where it falls after the BWOF date, a warning.

Questions

What happens to the Form 12A if there is a serious defect?

The report is still issued, but the certification status shows the Form 12A as withheld. The report tells the owner what to fix next.

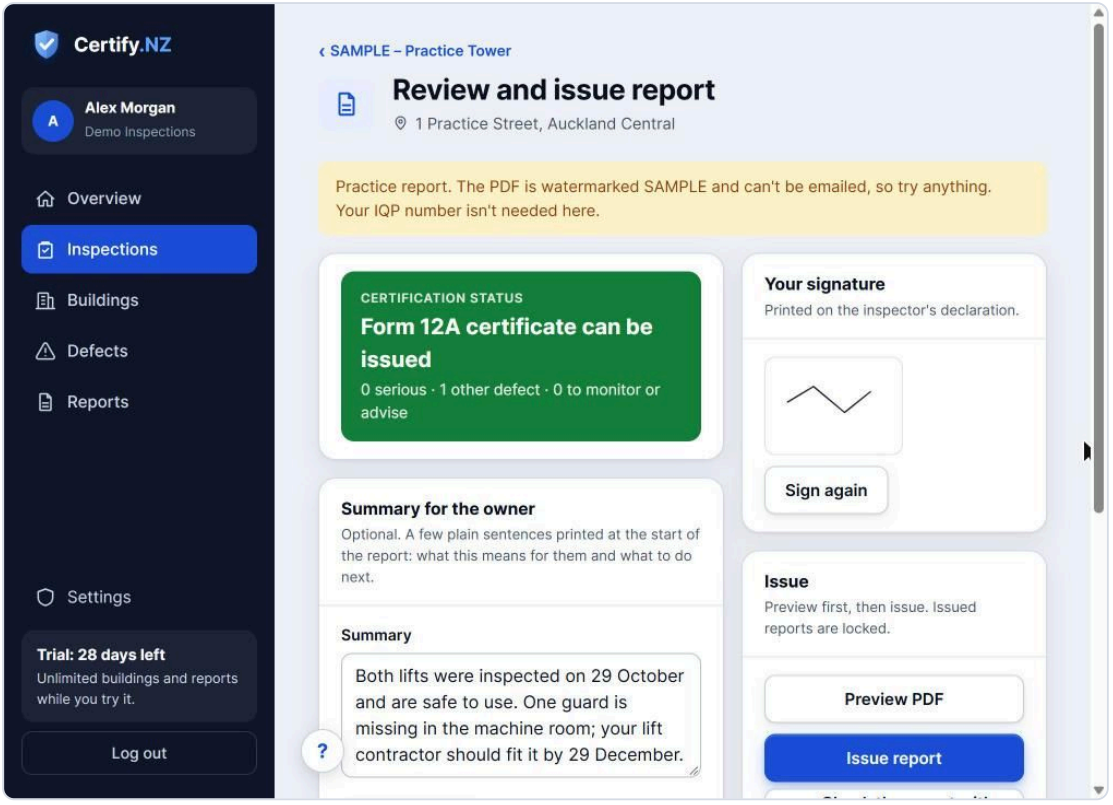
SECTION 6

Review, issue and send a report

After you complete an inspection, tap **Review and issue report**. Check the certification status, sign, preview the PDF, then issue it. Issued reports are locked and get a public verify code.

Review the report

1. On the completed inspection, tap **Review and issue report**.
2. Check the **Certification status**: whether the Form 12A can be issued, and how many serious and other defects there are.
3. Optional: write a short **Summary for the owner**, or tap **Write it for me**. It is printed at the start of the report.
4. Sign under **Your signature**. It is printed on the inspector's declaration and saved for next time.
5. Tap **Preview PDF** to see the report exactly as the owner will.

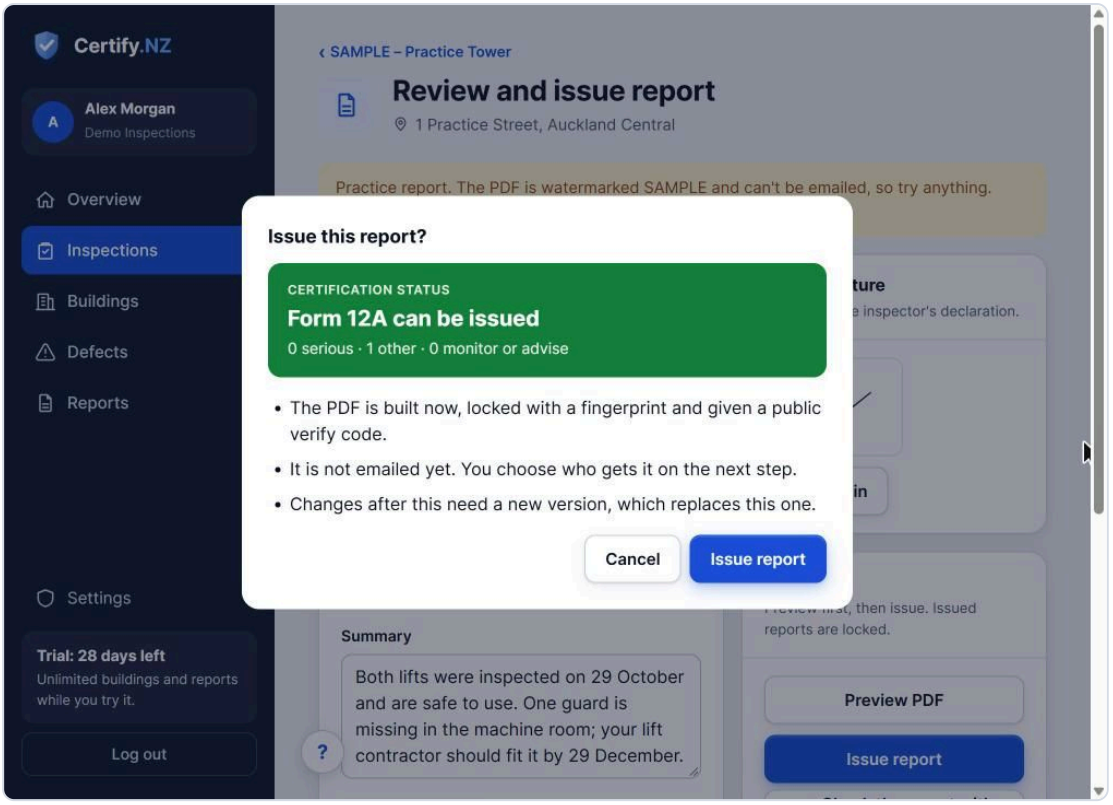


Review and issue report. The certification status comes first.

Issue it

1. Tap **Issue report**, then confirm.
2. The PDF is built, locked with a fingerprint and given a public verify code.

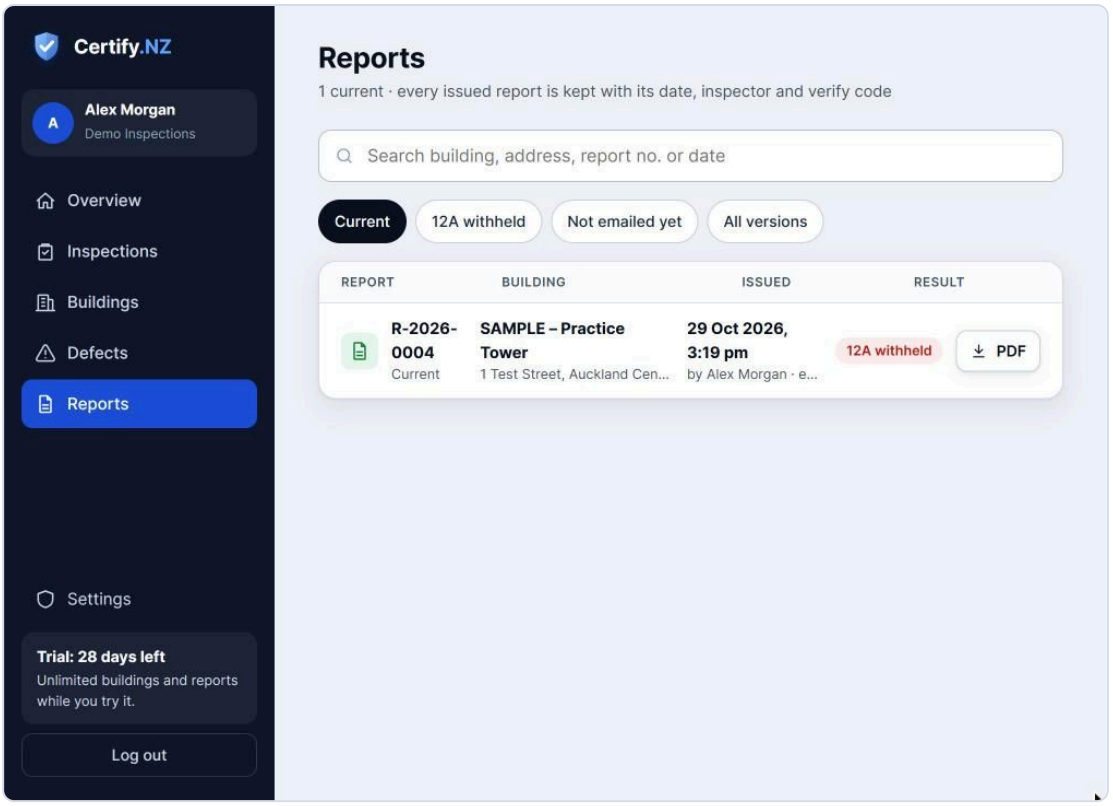
3. It is not emailed yet. On the next step you choose who gets it.



Issuing locks the report. Changes after this need a new version, which replaces this one.

Find past reports

The **Reports** page keeps every issued report with its date, inspector and verify code. Filter by **Current**, **12A withheld**, **Not emailed yet** or **All versions**, and tap **PDF** to download.



Reports. Search by building, address, report number or date.

Questions

Can I change a report after issuing it?

Not that version. Make your changes and issue a new version; it replaces the old one, and both are kept under **All versions**.

Why is the Issue button not working?

Real reports need your IQP registration number. Add it in **Settings → You**.

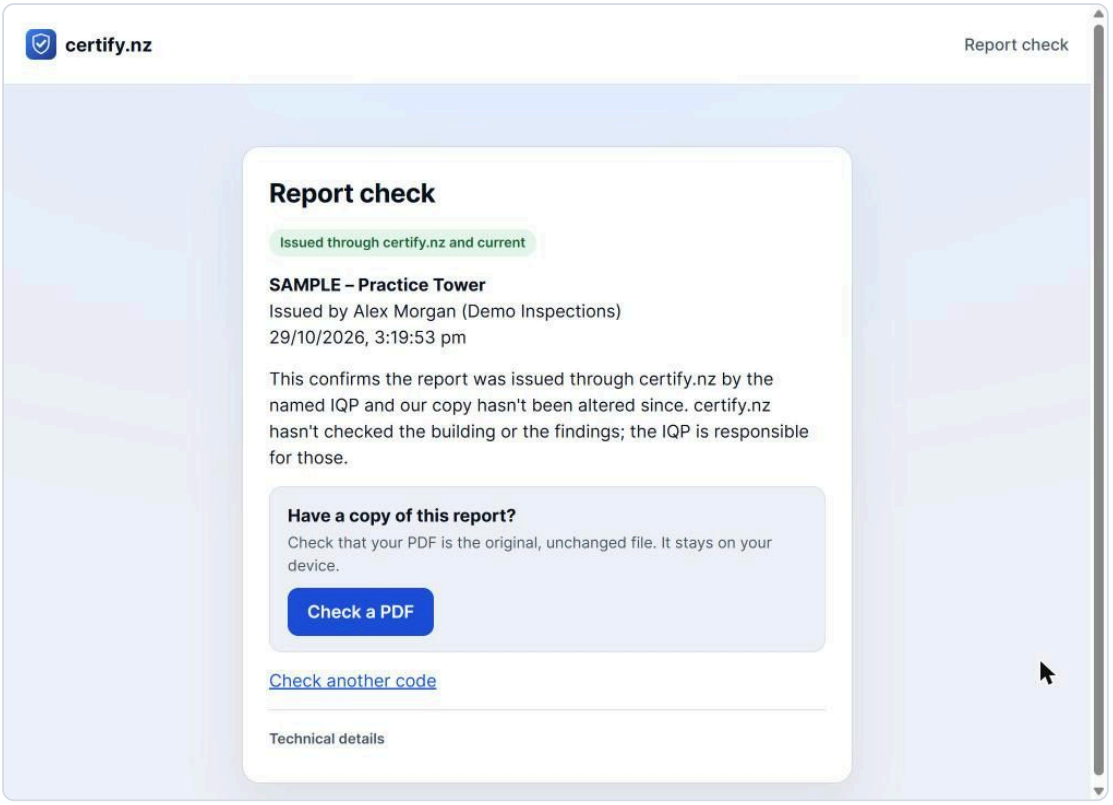
SECTION 7

How owners and councils check a report

> Every issued report carries a verify code. Enter it at certify.nz/verify to see who issued the report and when, and whether it is the current version.

Check a report code

1. Go to certify.nz/verify.
2. Enter the verify code printed on the report.
3. The page shows the building, who issued the report, when, and whether it is current.



A current report. certify.nz confirms who issued it and that our copy hasn't changed.

Check a PDF

If you have a copy of the report, tap **Check a PDF** and choose the file. Your browser compares its fingerprint with the issued report. The file never leaves your device.

What the check means

A match confirms the report was issued through certify.nz by the named IQP and hasn't been altered. certify.nz doesn't inspect the building or check the findings; the IQP is responsible for those.

Questions

What if the code is not found?

Check every character (0 and O look alike), then contact the IQP who issued the report.

SECTION 8

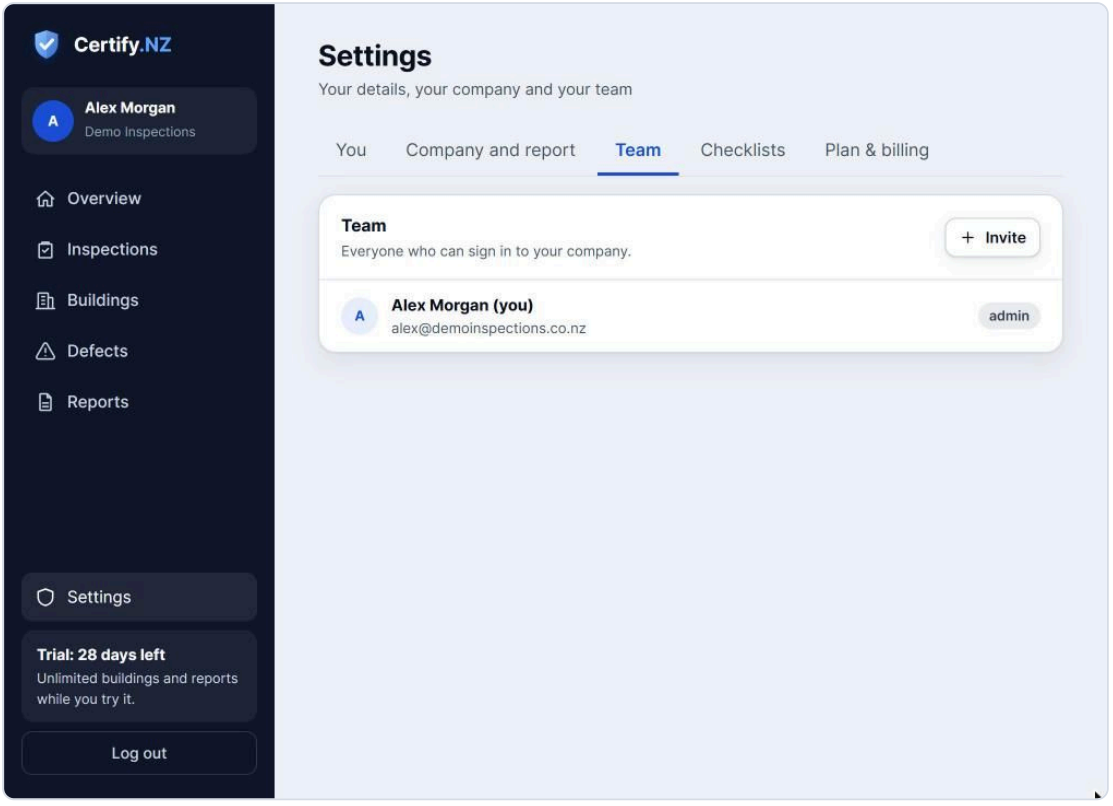
Invite your team and customise checklists

> Invite everyone who works on your inspections from **Settings → Team**. Office staff and reviewers are free; you pay per IQP.

Invite your team

1. Go to **Settings → Team** and tap **Invite**.
2. Enter their details and choose a role.

Role	What they can do
Admin	Everything, including billing and team
IQP	Inspects and issues reports
Reviewer	Checks and issues reports
Office	Buildings, scheduling, emailing reports

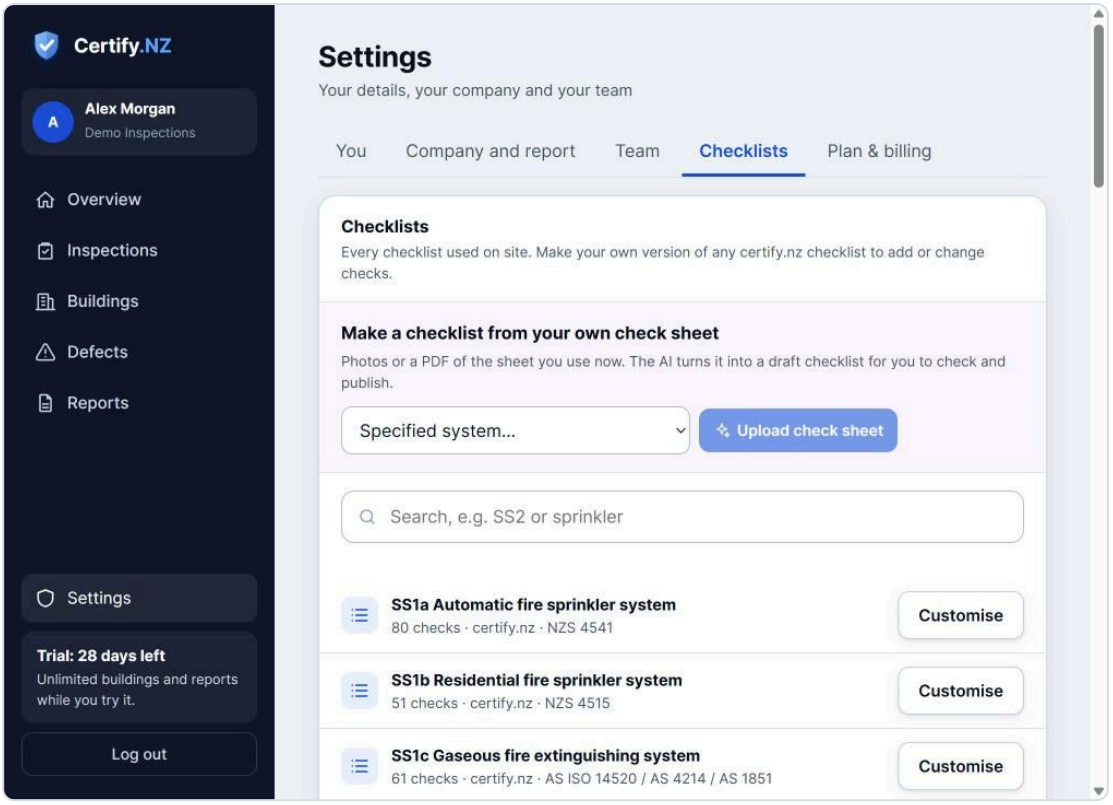


Settings → Team.

Customise a checklist

certify.nz has a starting checklist for every specified system. To change one, go to **Settings → Checklists** and tap **Customise** beside it. Add, change or remove checks to suit how you work.

Already have your own check sheets? Choose the specified system, then tap **Upload check sheet** with photos or a PDF. AI turns it into a draft checklist for you to check and publish.



Settings → Checklists. Each checklist shows its number of checks and the standard it follows.

> **Tip:** The building's compliance schedule decides what must be inspected. Edit a check whenever the schedule asks for something different.

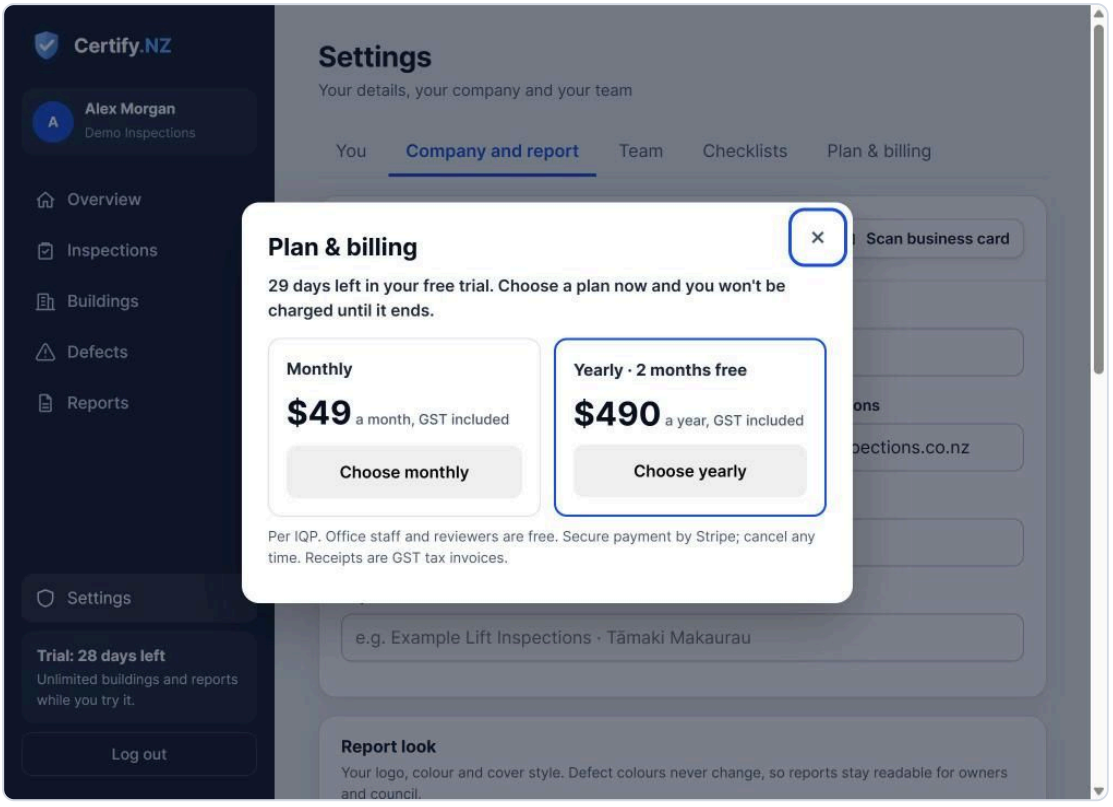
SECTION 9

Plan, billing and invoices

certify.nz costs $49 a month or $490 a year per IQP, GST included, after a 30-day free trial. Office staff and reviewers are free. Payment is by Stripe and you can cancel any time.

Choose a plan

1. Tap the trial box at the bottom of the menu, or go to **Settings → Plan & billing**.
2. Choose **Monthly** ($49 a month) or **Yearly** ($490 a year, two months free).
3. Pay securely on Stripe. If you choose during your trial, you are not charged until the trial ends.



Plan & billing. Prices are per IQP and include GST.

Invoices and cancelling

Every payment comes with a GST tax invoice. Once you are subscribed, open **Plan & billing** and tap **Manage billing, invoices or cancel** to update your card, download invoices or cancel.

Questions

Do office staff need a paid seat?

No. Office staff and reviewers are free. You pay for each IQP.

What happens when the trial ends?

Choose a plan before the trial ends to keep using certify.nz. If you choose during the trial, you are not charged until it ends.

SECTION 10

Help and troubleshooting

> Most questions are answered below. If yours isn't, email hello@certify.nz or use the contact form. We aim to reply within one working day.

Questions

The app says I'm offline but I have signal.

Close and reopen the app. If the message stays, the server may be unreachable; your work is saved on the device and will sync later.

An inspection says "Can't open this inspection".

Its building was deleted, so it can't be opened. Any report already issued is still in **Reports**.

I can't issue a report.

Add your IQP registration number in **Settings → You**. It is printed on the declaration.

How do I remove the practice building?

Open **SAMPLE – Practice Tower** and delete it from the bottom of its page.

How do I fix a mistake in an issued report?

Issue a new version. It replaces the old one, and both stay under **All versions** in Reports.

Who can see access codes and keys?

Only IQPs and admins. They are stored encrypted and each view is logged.

Can I use certify.nz on an iPad or Surface Pro?

Yes. It runs in the browser on phones, tablets and laptops.

Where do I get help inside the app?

Tap **?** at the bottom of any screen for tips about that page, or to ask for help.