

## Veco User Guides – Tenancy Agreements

### Introduction

Veco™ version 1.1.5.0 introduces a new mail merge facility to automate the pulling together of standard clauses to create a tenancy agreement.

Your company may deal with a variety of different types of tenancy, eg:

- Assured Shorthold Tenancy (AST)
- Assured Tenancy
- Regulated Tenancy
- Company Tenancy
- Common Law

Each type of tenancy will require different legal wording in the main body of a tenancy agreement, but additionally, specific clauses may need to be inserted depending on the tenancy itself. For example, a tenant's deposit may be protected by one of the government approved schemes in which case a specific series of clauses and definitions may need to be inserted into the main agreement depending on which scheme is used.

Likewise, different wording may be need for such things as:

- Break Clause
- Option to Renew
- Type of Service

Also, the part of the tenancy agreement where the tenant signs may have slightly different wording depending on the type of tenancy.

The Mail Merge facility of Veco™ has the ability to define the rules and clauses to allow a Tenancy Agreement to be produced automatically.

## Designing a Tenancy Agreement

Designing a Tenancy Agreement in Veco™ can be broken down into the following stages:

### Open one of your existing tenancy agreements

You will probably have a tenancy agreement for one of your existing tenancies, so simply locate and open this, and print it out.

### Review the document

Using a pen or marker, highlight any paragraphs and clauses that may vary each time you produce a tenancy agreement. For example, a deposit protection scheme may have a main prescribed clause, and several paragraphs that make reference to that particular scheme.

At this stage you should ignore each individual data field that will change for each tenancy (eg property address). These will be dealt with later.

### Open the original tenancy agreement document

Open the tenancy agreement document in Word, and “Save As” a new copy

This should be done external to Veco™ at this stage.

### Clause Extraction

Taking each clause in order:

- a. Select the whole clause (include any section numbering)
- b. Click “Edit : Copy” (Ctrl+C)
- c. Click “File : New” to create a new document
- d. Click “Edit : Paste” (Ctrl+V)
- e. Click “File : Save As” (Ctrl+S) and save as a new document (eg “TA – Clause 1”)
- f. Close the new clause document (“File : Close”) to return to the main document
- g. Click “Edit : Cut” (Ctrl+X) to remove the clause from the main document
- h. Replace the clause with some wording to use as a placeholder (eg “TA – CLAUSE 1 GOES HERE”)

Repeat for each clause in the document.

Do not worry at this stage if the paragraphs become renumbered as you remove them, this will be taken care of when the whole agreement is reformed in Veco™.

### Importing Clauses into Veco™

Taking each clause document saved above:

- a. In Veco™, go to the grid “Mail Merge Templates” and click “Add New”
- b. Import the **clause** document
- c. Enter a title for the template (eg “TA – Clause 1”)
- d. Select the relevant data source (eg “Tenancies and Main Contact”)
- e. Review the template and drag any data fields from the list on the left into the relevant position in the template

- f. Tick the “**Clause Document**” box at the bottom left
- g. Click “Save” and then “Close”

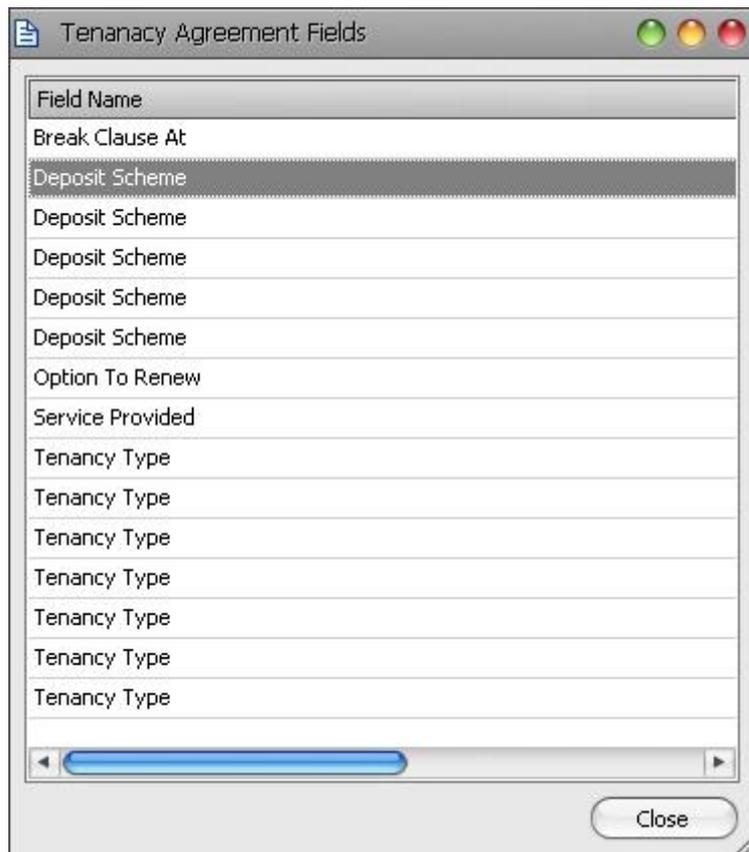
Repeat for each clause.

### Linking Clauses to Specific Fields

Now that each clause has been defined they need to be linked to specific tenancy fields. In other words, Veco™ needs to know which of your new clauses relate to the type of tenancy, and which relate to the type of deposit protection.

Tenancy Agreement Field clauses are defined under “Admin : Templates : Tenancy Agreement Fields”.

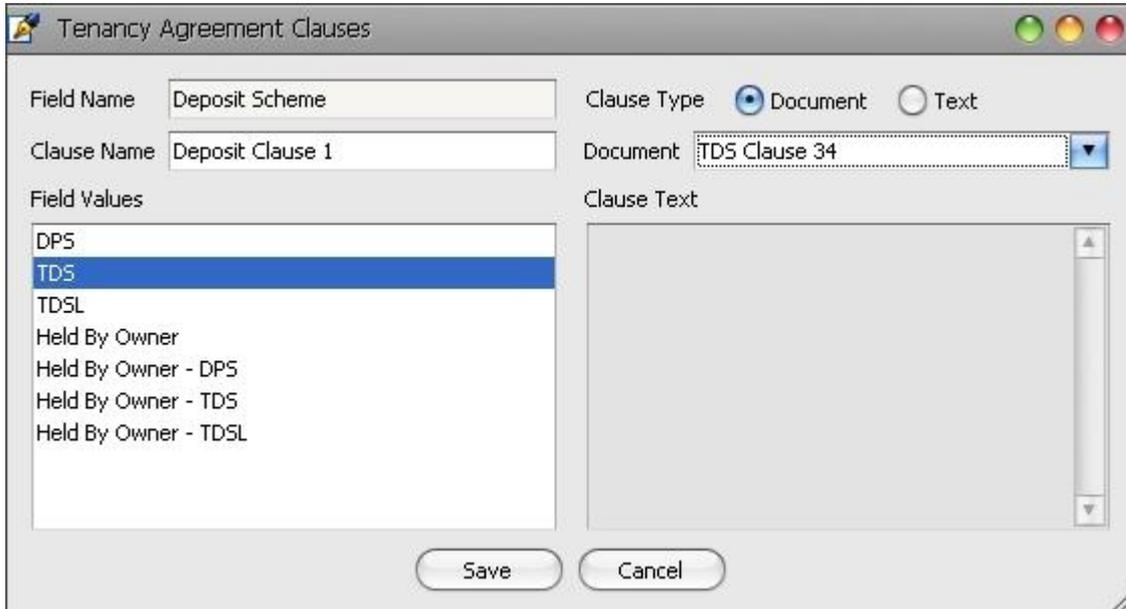
Veco™ allows for a number of different clauses for various tenancy fields:



To link a clause document to a field:

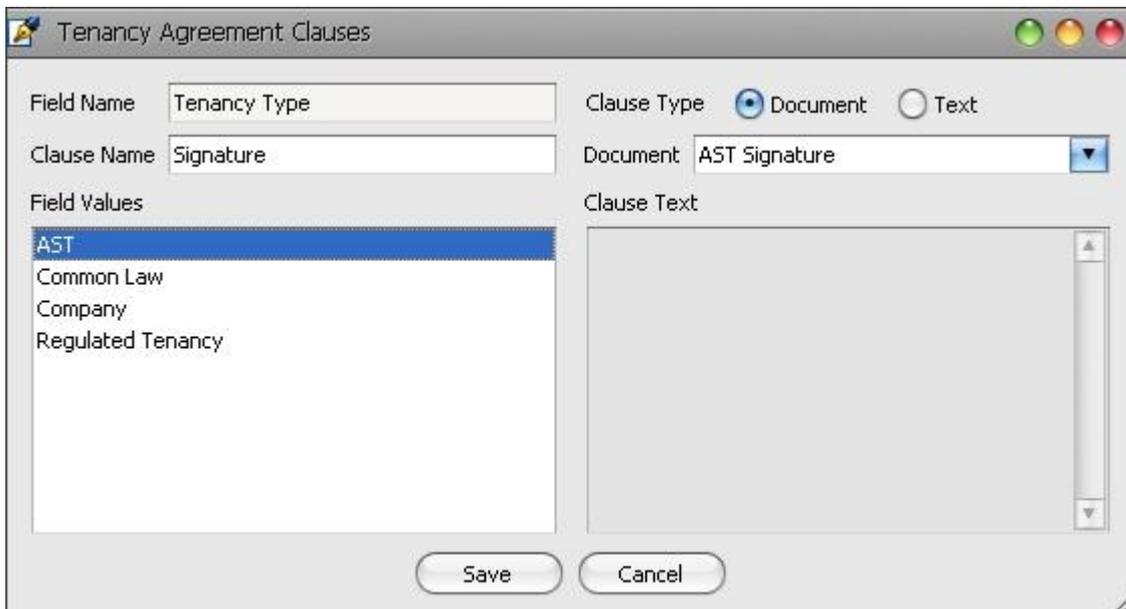
- a. Double-click on a ‘Field Name’
- b. Enter a “Clause Name”. This will be used as the name of the mail merge field in the main agreement.
- c. Select a “Field Value”
- d. Select a “Clause Type” of either “Document” or “Text”
- e. Choose the relevant document for the chosen clause value, or type the relevant stand alone text into the “Clause Text” field.
- f. Click “Save”.

Examples:



In the above example the mail merge template “TDS Clause 34” will be used if the tenancy deposit scheme is set to “TDS”.

A different document clause can be selected for each of the typical values in relation to “Deposit Scheme”.



In the above example the mail merge template called “AST Signature” will be used if the tenant type is set to “AST” in the tenancy details.

Again, different signature blocks could be used for each type of tenancy.

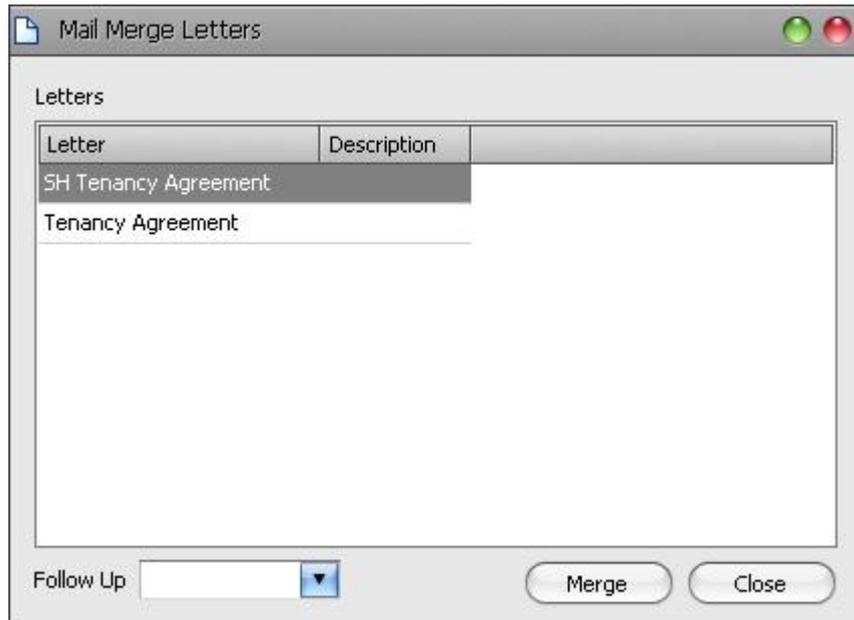
Importing the Main Agreement Document into Veco™

- a. In Veco™, go to the grid “Mail Merge Templates” and click “Add New”
- b. Import the copy of the **main** agreement document
- c. Enter a title for the template (eg “TA – Main Document”)
- d. Select the relevant data source (eg “Tenancies and Main Contact”)
- e. Using the list of Tenancy Agreement Clauses shown in the field list on the left, drag the relevant clause into the main template to replace the placeholder. (Eg replace the wording “TA – CLAUSE 1 GOES HERE”)
- f. Review the template and drag any standard data fields from the list on the left into the relevant position in the template
- g. Tick the “**Tenancy Agreement**” box at the bottom left
- h. Click “Save” and then “Close”

## Creating a Tenancy Agreement

### Producing an Agreement

- a. Call up a tenancy from the Tenancies/Deals grid
- b. From the “Actions” menu select “Tenancy Agreements”
- c. Choose the relevant agreement template
- d. Click “Merge”



### Internal Workings

A tenancy agreement is created by the system as follows:

1. The main Tenancy Agreement Template is selected
2. Depending on the value of certain fields (eg Tenancy Type), “Clause Templates” are merged into the “Main Agreement” template
3. In the resulting document standard fields are replaced by the values stored in the tenancy details (eg Tenant Name, Address, etc)
4. If standard mail merge clauses are used a prompt will be given at the time an agreement is created
5. Other mail merge prompts can also be used to manually enter the relevant text into the document
6. The end product is a complete agreement that can be printed or emailed

## Mail Merge Fields in Templates

Both a main **Tenancy Agreement** template and any **Clause Templates** can contain:

- Standard mail merge fields from the selected data source
- Standard mail merge clauses
- Mail merge prompts

## Section Numbering

If the main template and clause template documents have been separated correctly the resulting tenancy agreement should have any sections numbered correctly. However, if this doesn't happen, or if there is need to start a new section number within a specific clause template, it may be necessary to force section numbering.

To force section numbering in a clause template document:

- a. Open the main merge template document
- b. At the relevant position in the document insert a "LISTNUM" field:

Press Ctrl+F9 - the double-brace characters will appear {}

Inside the {} characters type **LISTNUM \Lx** where **x** represents the section level number.

{ LISTNUM \L1 }  
{ LISTNUM \L2 }

- c. When the final document is combined the section numbering will automatically follow on from the numbering in the main template document.