

Inspections

Palace has an area called Control - Property (Inspections). Any managed active property will show in the Control - Property (Inspections) area. When the property first shows in the list, the inspection cycle needs to be set up.

Palace will then take this information and if the process is followed correctly, it will manage the updating and charging of inspections automatically.

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Setting up Inspections

As mentioned above, a new managed property once entered into Palace, will show in the Control - Property (Inspections) area. It will be marked as N/A waiting to be set up. The benefits of setting up a property for an inspection within Palace are:

You can run reports to see what inspections are coming up in a set time frame, you can sort this by agent and grid as well as date.

Once you have updated an inspection, Palace will charge the Owner and roll over the inspection to the date of the next inspection. You have a historical record of all the inspections undertaken for a property whilst in your care.

- Click on Control (Top tool bar), then click on Property (Inspections)
- Filter by Agent (if needed)



Property Address	Grid	Agent	Frequency	Next Inspection Date	Charge
<input type="checkbox"/> Lemon Pde (37), Henderson, Auckland	Yellow	kelly		N/A	N/A
<input type="checkbox"/> Karamu Street (23), Te Atatu Peninsula, Auckland	Blue	kelly		N/A	N/A
<input type="checkbox"/> Tinopal Street (8), Helensville, Auckland	Red	kelly		N/A	N/A
<input type="checkbox"/> Titorangi Road (75), Titorangi, Auckland	Green	kelly		N/A	N/A
<input type="checkbox"/> Matipo Rd (8), Mt Roskill, Auckland	Green	kelly		N/A	N/A

- Scroll to the bottom of the list (or click on the column header "Charge") to find any properties marked N/A - This means it is not yet set up for an inspection.

- Highlight the Property, right click and select "Edit Next Inspection"

Details - Diary Charge

03/10/2017 1:28:19 PM

Charge

Description
Inspection

10/2000

Group: Inspections

Agent: Kelly (Kelly Chapman)

Start Date: 03/10/2017

Repetitive Period: 13 Week(s)

Charge: \$45.00

Ledger Account: Inspection Fees

Include (Print)

Processed

Save Cancel

- Some of it has already been set up for you. Double check you have the selected the correct agent connected to this inspection (i.e. if you have a specific agent who does Inspections make sure you link this to that agent).
- Enter the date that you are first going to inspect this property
- Enter the frequency that you are going to inspect this property i.e. 3 months - 13 weeks
Note: *If you change your frequency to weeks instead of months, this will allow the inspection to always fall on the same day of the week i.e. Monday, and will never fall on a weekend.*
- Enter the charge rate, excluding GST. If you do not charge leave as zero.
Note: *Even if set as zero, this transaction will show on an Owners Statement, showing that an inspection has been undertaken but no charge has been put through.*
- Make sure the Ledger Account is set to "Inspection Fees".
- Click Save.

NOTE: *An inspection cycle has now been set up for this property and it will show in any "Inspection Reports" under that date range. It will also show up in the "Reminders" tab on the date it is due, so that you can charge it through.*

Inspection Report for upcoming Inspections

Preparing for your Inspections:

- Print the upcoming inspection report.
- Prepare and send the Inspection Notification Letter to your tenants.

Inspection Report

There are two inspection reports available in Palace:

Control - Property (Inspections): This report will give you a snap shot of the details already showing on the screen.

Property Reports – Inspections: This report is the better one for planning inspections. It gives you all the information you will need to prepare the letters, and get ready to do the inspections.

- Click on Property Reports, select Property - Inspections
- Make your selections
- Date Range: The dates that you are going to cover, this will include all inspections with a due date within this date range.
- Grid: If you use Grids to sort your inspections (more information on Grids to follow) enter them here.
- Agent: Select the agent you are doing the report for.
- Choose what type i.e. Unprocessed Only, Processed Only or Both.

Unprocessed Only - Inspections that have not been charged and forwarded to the next frequency i.e. Inspections that are falling due.

Processed - Inspections that have been charged and forwarded to the next frequency i.e. Completed Inspections.

- Sort By: Choose from Street, Grid or Date.
- Click on Preview - The report will look like this:

Kadi Property Management Upper Hutt

Inspection Report

Between 3/10/2017 And 3/12/2017 By Street For Unprocessed Entries Only

Due Date	Property and Tenant Details	Grid	Key No	Key Detail
Agent:	Jane Geerlings			
20/11/2017	15 Amazing Road, Sunrise, Mongolia		0060	
Charge	Owner Iwish Tosell		Phone (H)	Phone (W)
	Last Completed Inspection Date		Last Inspection Charge	22/08/17 (\$0.00)
20/11/2017	3/5 Dixon St, Te Aro, Wellington	Green	0013	
Charge	Owner Demo Stration		Phone (H) 04)9789999	Phone (W)
	Last Completed Inspection Date 13/07/2011		Last Inspection Charge	22/08/17 (\$0.00)
	Tenant Name Clever Cloggs			
	Rent 450.00 / Week			
20/11/2017	35 Gold Street, Trentham, Upper Hutt		0021	
Charge	Owner David Day		Phone (H) 835 1447	Phone (W) 837 2798
	Last Completed Inspection Date		Last Inspection Charge	22/08/17 (\$0.00)
12/10/2017	89 Lemon Pde, Henderson, Auckland	Red		
Charge	Owner Patricia Ant		Phone (H) 832 2222	Phone (W) 276 7748
	Last Completed Inspection Date 21/08/2017		Last Inspection Charge	13/07/17 (\$45.00)
18/10/2017	25 Randwick Street, Moera, Lower Hutt		0009	
Charge	Owner Bucktoo Family Trust (4567)		Phone (H) 03 5554895	Phone (W) 03 5555522
	Last Completed Inspection Date 21/08/2017		Last Inspection Charge	19/07/17 (\$0.00)
	Tenant Name Rebecca Snow			
	Rent 350.00 / Week			
	Phone (Mob) 0279111940			

Total Number of Inspections:

5

NOTE: This report is ideal to use when setting up the mail merge letters to check you have the correct tenants and properties.

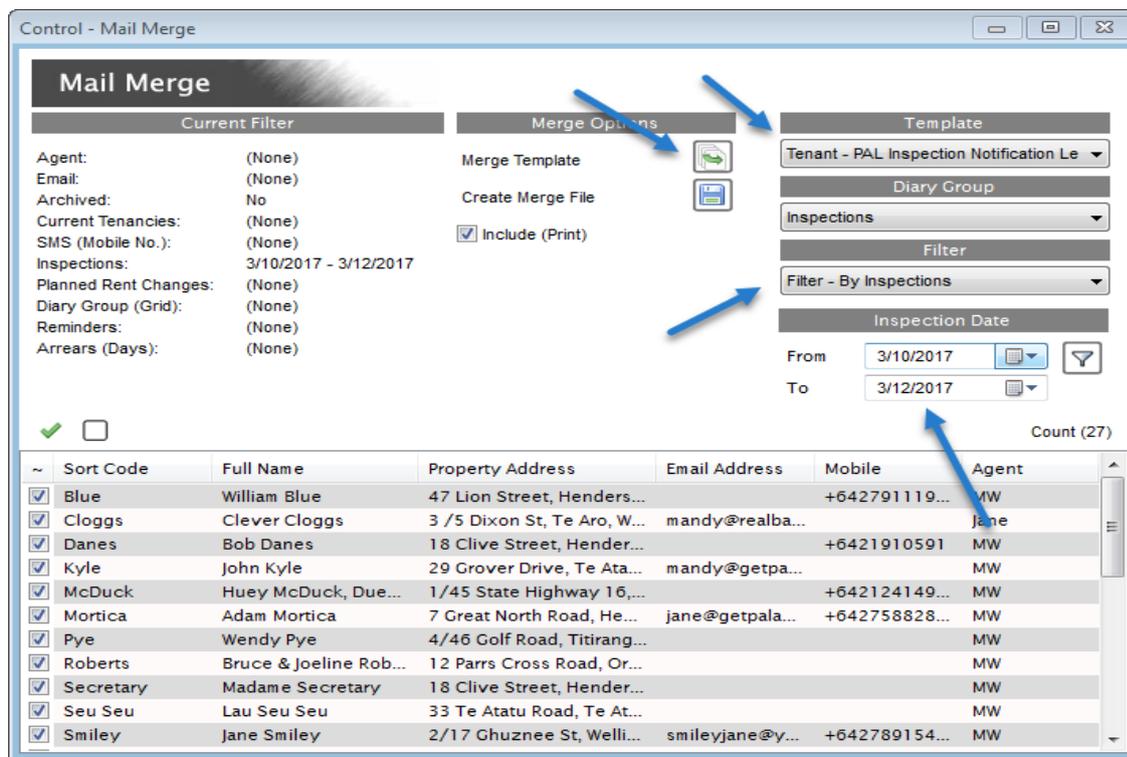
Inspection Notification Letters

There are two ways to produce the Inspection Notification letters to the tenants:

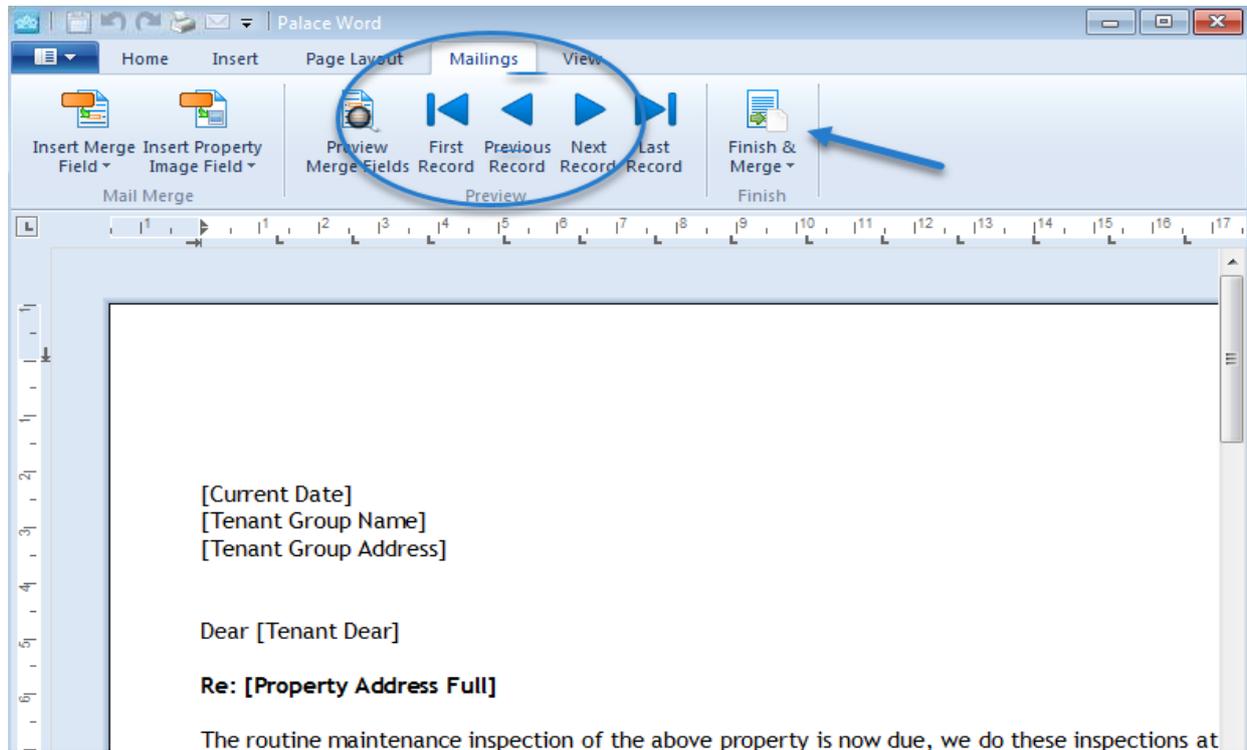
Individually through Correspondence - Right click on the Tenant, go to Diary, click on Correspondence - see the Diary help file for more information.

Bulk Mail Merge for many tenants

- Click on Control – Mail Merge (Documents) – Select Tenancies
- Under Template - Select the Inspection Notification Letter
- Then under Filter - Filter by Agent. Pick yourself and then click on the Funnel to filter
- Then Filter again and select By Inspections – Select Dates then click on the Funnel to filter
Note: If you are using Grids and want to filter by Grid, then click on Filter and choose By Reminders, then pick the Group "Inspections", then select the Grid option on the drop down arrow, click on the Funnel to filter.
- Once you have everyone showing on your list, check it off against the Inspection Report.
- Click on the "Merge Template" icon, this will take you to the letter.



- Your letter will now show on the screen. Make any necessary changes here.



- Click on Mailings (Top Tool Bar) and then you can click on the blue arrows (i.e. Next Record) to see the merge. When you are ready click on the Finish & Merge (You can email or print from this area).
 - Follow the prompts through.
 - When completed close out, or repeat the procedure to email if you had chosen to print earlier.
 - If necessary, under Control, Mail Merge (Documents), Tenancies, you can select SMS and send out reminders.
- NOTE:** These letters, emails or SMS messages will be saved in each tenant diary as long as you have clicked yes to the question that pops up during the mail merge.

Processing the Inspection

Once you have completed the inspection, you need to process it in Palace so that the following can take place:

Charge the Owner - takes the money and GST from the property and moves it into the Inspection Ledgers.

Rolls the inspection over by the frequency i.e. 13 weeks to the next due date.

- Click on Home - Click on the "Charges" Tab.
- You will see two separate areas (Chargeable and Insufficient Funds). Chargeable means the owner/property has enough money and you can process. You can process the Insufficient funds as well (if Strict Audit is set to No), but you must be aware that this will overdraw the owner and risk overdrawing the Trust Account.

NOTE: If you are under Strict Audit Control, Palace will not allow you to do this.

NOTE: If you have done an inspection in advance of its due date, go into the Control - Property (Inspections) area and adjust the next date to the date you completed it. Return to the Home screen, Charges Tab to see that inspection in the list.

- Tick the properties you want to process.
- Click on the blue processing arrow (Not the one with the arrow and the line).
- A pop up box will appear, say yes.

Reminder Title	Date	Agent	Amount	Property Bal
Property (Chargeable)				
<input checked="" type="checkbox"/> Property: 84 Beach Road , Mairangi Bay, Auckland 01310 - Routine inspection	03/08/2017	MW	\$51.75	
<input checked="" type="checkbox"/> Property: 2/17 Ghuznee St, Wellington, Auckland - Inspection	03/10/2017	MW	\$28.75	
Property (Insufficient Funds)				
<input type="checkbox"/> Property: 17 Henderson Road, Henderson, Auckland - Inspection	04/10/2017	MW	\$51.75	\$44.75

- This will take you to the Transaction screen, click on Process.

The funds will be taken off the property and moved to the Inspection Ledger.

The inspection will be rolled over to the new inspection date. The Control - Property (Inspections) area and each property diary will be updated.

Producing an Inspection Report for the Owner

This is for a manual report, if you would like information on the report produced by the iPad or iPhone, see the Inspection App help files.

There are sample templates that we have supplied and you can edit them through Tools - Document Templates.

- Right click on the Property, click on Diary
- Click on Correspondence - click on the drop down arrow and select your Inspection report template, click on the pencil to open the report.
- Fill in the details and insert photos as needed
- Once you have finished, you can print or click on the Envelope to email as an attachment.
- If you want to have the report as the body of the email, then instead of clicking on Correspondence, click on Email in the Diary instead, and then choose the template under Correspondence.

NOTE: *The report will save in the Diary so you can access it anytime.*