

Advanced Key Management System

Palace runs a key system that allows you to check keys in and out of Palace. Whether it is a Creditor or a Property Manager that is taking the key, the key will be checked out and a reminder system is put in place so that you always know where the keys are at any given time. There is an automatic SMS (Text) system that sends a text out to the person who has the key to remind them to return the key back.

Important Notes:

Work Orders will no longer show the Key number when you change to this system. This is to make sure that each key is checked out of Palace. When you check the key out you will then be given the key number.

The Inspection Report that you print out to see what inspections are due will also not show the Key numbers because of the same reason above.

If you choose to use the Advanced Key system and then change your mind, you can switch back BUT note that any keys you added will not be taken across and you will need to add them again.

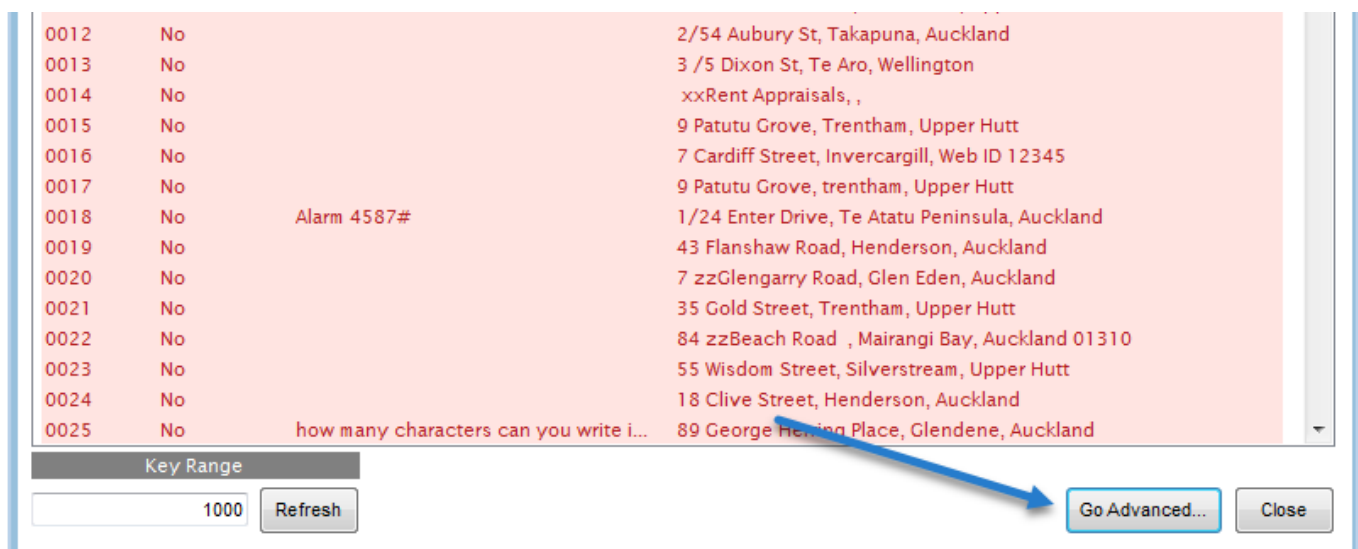
Setting up the Key System Initially

Only users with authority can access the Advanced Key set up area (Authority is given under the Agents area). You will also need to be using the SMS system in Palace and must be on automatic top up.

Automatic Top Up: This is where Palace monitors your SMS usage. When you reach the threshold level you selected i.e. 50 texts, Palace will automatically top up the SMS credits to the top up level you selected i.e. 250 (or more depending on the size of your company). Please contact support on support@getpalace.com to arrange this.

Setting Up the Advanced Key System:

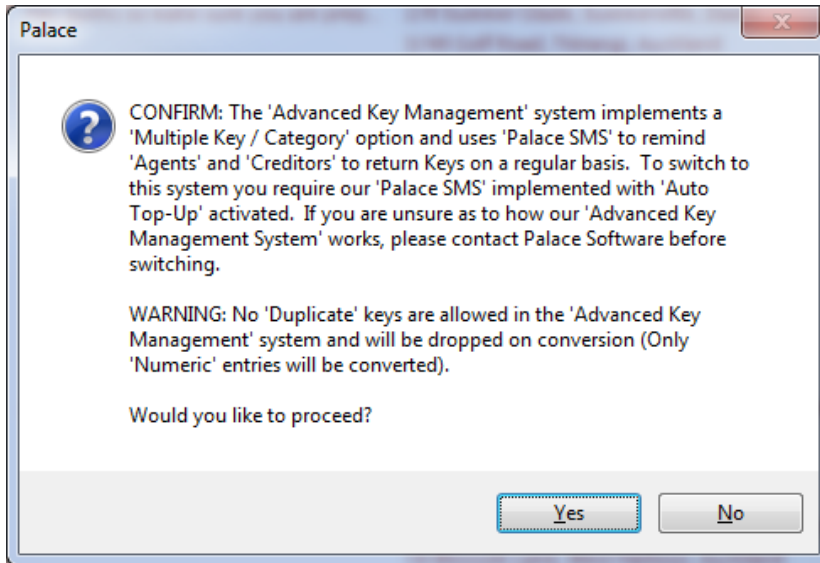
- Go to View
- System Keys (Admin)
- Click on Go Advanced, enter the System password



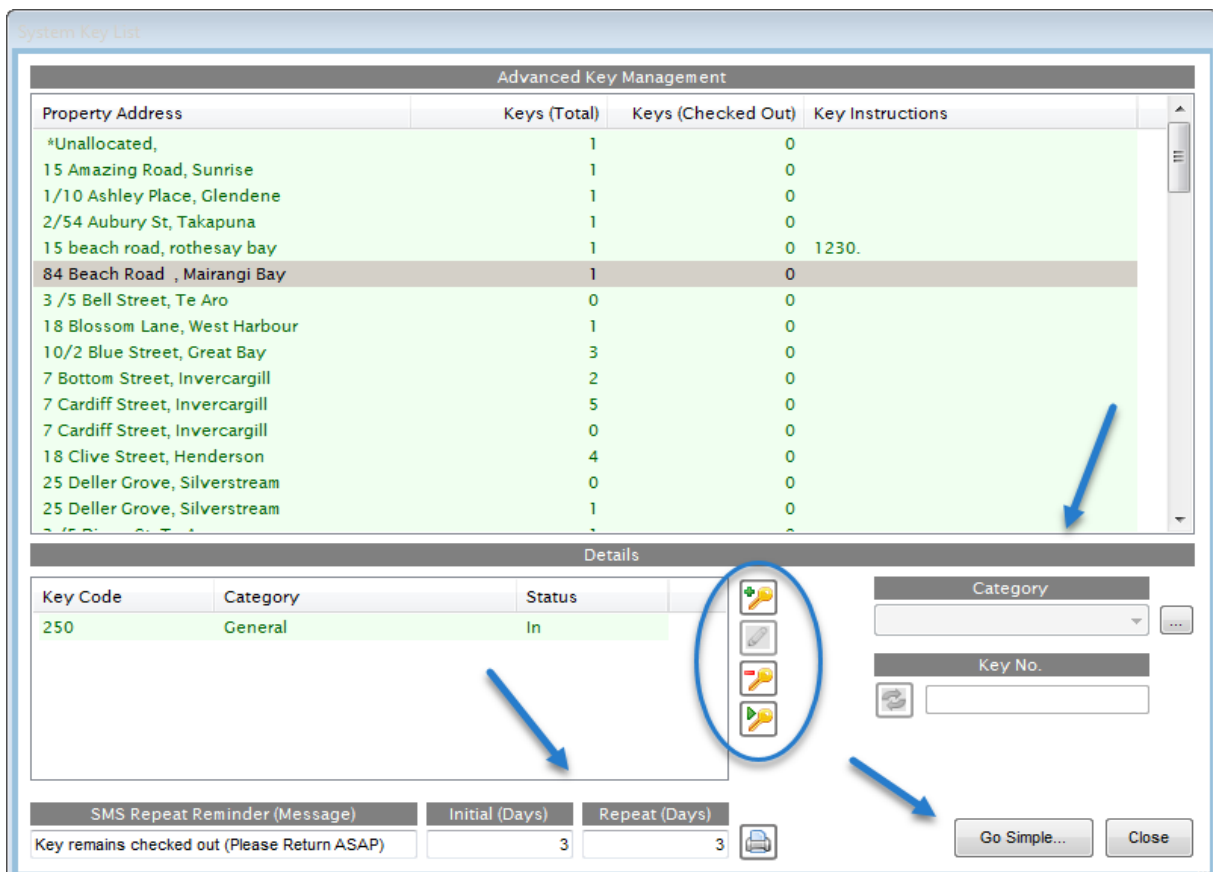
| | | | |
|------|----|--|--|
| 0012 | No | | 2/54 Aubury St, Takapuna, Auckland |
| 0013 | No | | 3 /5 Dixon St, Te Aro, Wellington |
| 0014 | No | | xxRent Appraisals, , |
| 0015 | No | | 9 Patutu Grove, Trentham, Upper Hutt |
| 0016 | No | | 7 Cardiff Street, Invercargill, Web ID 12345 |
| 0017 | No | | 9 Patutu Grove, trentham, Upper Hutt |
| 0018 | No | Alarm 4587# | 1/24 Enter Drive, Te Atatu Peninsula, Auckland |
| 0019 | No | | 43 Flanshaw Road, Henderson, Auckland |
| 0020 | No | | 7 zzGlengarry Road, Glen Eden, Auckland |
| 0021 | No | | 35 Gold Street, Trentham, Upper Hutt |
| 0022 | No | | 84 zzBeach Road , Mairangi Bay, Auckland 01310 |
| 0023 | No | | 55 Wisdom Street, Silverstream, Upper Hutt |
| 0024 | No | | 18 Clive Street, Henderson, Auckland |
| 0025 | No | how many characters can you write i... | 89 George Herding Place, Glendene, Auckland |

Key Range: Refresh Go Advanced... Close

- Read the pop up, as this tells you important information (e.g. No duplicate Keys, and it will use your SMS credits if it needs to send out reminders). Click OK



- A list of all the keys in the system will show. It will show you how many keys are being held against each property. You can add more keys or you can assign the keys to a Category (see the following page for an explanation on Categories).
Note: All keys will be auto assigned to the category – General.



- Down the bottom of the screen you will see the SMS settings. *These can be changed against each property as you check out a key (Showing here are just the default settings).* Initial Days: In 3 days after the key has been checked out, an SMS will be sent to the people you have set up. Then in 3 days after that, another one will be sent.

Note: If it does not suit you, you can switch back by clicking on Go Simple. However, be aware you will lose all changes since going to advanced.

Categories

The idea behind Categories is to allow you to assign a certain bunch of keys to a certain group of people. For example: Say you have two sets of keys, one with every key for that property and another bunch with just the main house key. You may assign the house key to the Category – Creditors. Then you would assign the other bunch of keys to General.

That way, when a Creditor needs the key, you would just check out the key under the Category – Creditors. You would then know the creditor has got the single key and not the whole bunch.

Leave the spare keys as General.

To add a new key or (an extra key)

- Click View, System Keys (Admin)
- Find the Property and Highlight
- Click on the Key Icon with the green + symbol (Add Key)

The screenshot shows the 'System Key List' application. At the top, there's a header 'Advanced Key Management'. Below it is a table with columns: 'Property Address', 'Keys (Total)', 'Keys (Checked Out)', and 'Key Instructions'. The table lists various properties and their key counts. Below the table is a 'Details' section with a table for 'Key Code', 'Category', and 'Status'. The 'Key Code' is '0023', 'Category' is 'General', and 'Status' is 'In'. To the right of the 'Details' table are input fields for 'Category' and 'Key No.'. At the bottom, there are buttons for 'Go Simple...' and 'Close'. A blue arrow points to the 'Add Key' icon (green plus sign) in the details panel. Another blue arrow points to the 'General' category in the details panel.

- Select the Category from the drop down box
- Type in the Key Number – **(It will warn you if the number has already been added)**
- Click Save
- Close if finished, otherwise add more keys

Editing a current Key Record

If you need to change the Key Category:

- Highlight the Property, then highlight the Key in the bottom area
- Click on the Icon with the Pencil Symbol (Edit Key Details)
- Select the new category from the drop down list under Category

Checking out and in a key per property

You can check out one key at a time per property or you can check out multiple properties.

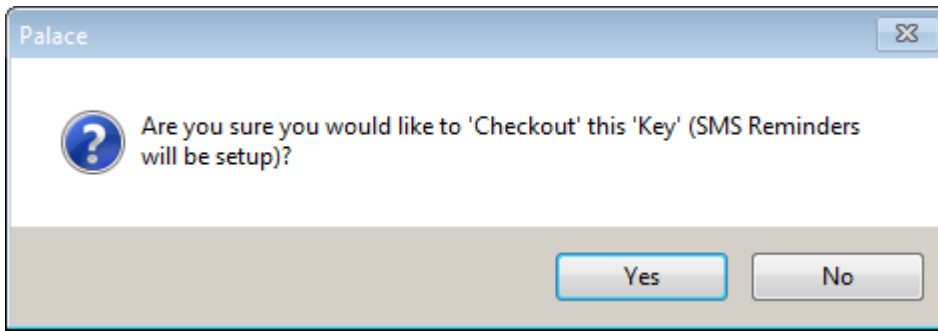
The instructions below are for a single property. The instructions for multiple properties are further down.

- Go to the Property List
- Find the Property, right click and edit
- Over the right hand side you will see the Key Number area

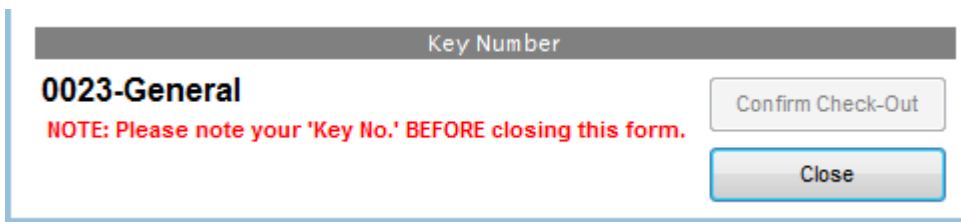
- Click on the drop down arrow on the top field (beside the Add New Key & Check Out Key Icons)
- Select the category e.g. General
- Click on the Check Key Out Icon (with red arrow)

- The top of the screen shows the Agent who belongs to the Property and their cell phone number.
- You can also select the creditor (if the key is being checked out to a creditor).
Note: If a cell phone number does not show, you can enter it yourself.
- These people will get a SMS (text) reminder if the key does not come back in the allocated time.
- **SMS Repeat Reminder (Message):** This is what will show on the Text that goes out.
- **Initial (Days):** Whatever number you put here, is the number of days that Palace will wait before it sends out the reminder text.
- **Repeat (Days):** Whatever number you put here, is the number of days that Palace will wait after the initial text goes out, before it sends a reminder. It will keep doing this until the key has been checked back into Palace.

- Click on Confirm Check-Out



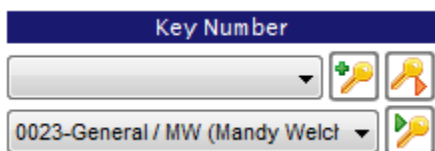
- Click Yes to the Pop Up Message
- Write down the Key Number that shows at the bottom of the screen under Key Number **(BEFORE closing out as this is the ONLY indication you will get of the key number).**



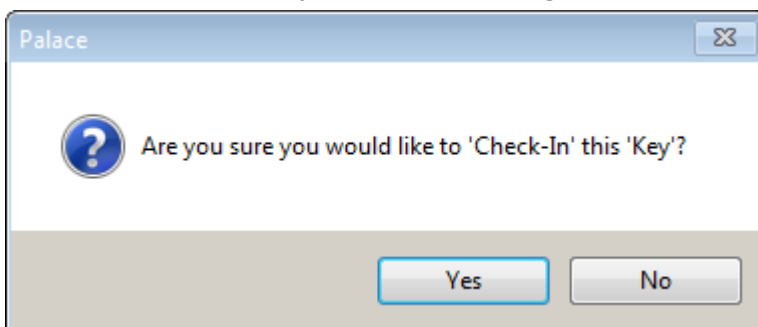
- Click Close

Checking the Key Back In

- Go to the Property List
- Find the Property, right click and edit
- In the Key Number area, click on the drop down arrow on the bottom field (beside the Check key In Icon with the Green arrow).



- Pick up the key that you are checking back in
- Click on the Check Key In icon with the green arrow

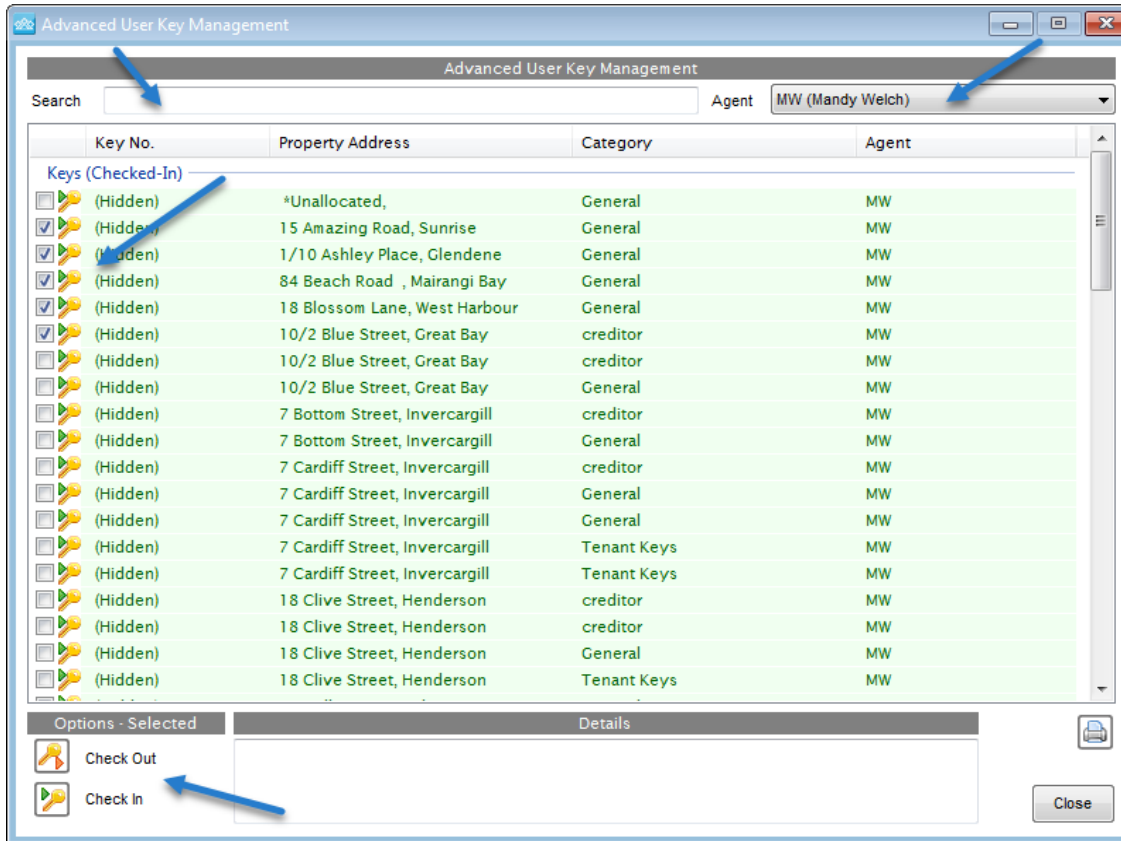


- Click Yes to the Pop Up Message
- The Key is now checked back in and you can click Save to dose out

Checking out and in multiple keys at the same time

Sometimes you need to check out more than one key at a time for multiple properties, e.g. Going to do Inspections.

- Click on View
- Click on System Keys (User)
- You can search by Property or you can filter by Agent



- Then you can select all the properties that you want to check out keys
- Then click on the Check Out icon at the bottom of the screen
- It will bring up the SMS set up screen

Advanced Key Management - Check Out

SMS Phone #1 (Agent) MW (Mandy Welch) +64272767748

SMS Phone #2 (Agent)

SMS Phone (Creditor) Green Acres (Green Acres) +64275882800

SMS Phone (Other)

SMS Repeat Reminder (Message)

Key remains checked out (Please Return ASAP)

NOTE: Please do NOT include Property Address in Message. This information will be added in automatically.

Initial (Days) 3

Initial (Days) reminder indicates how many days a 'Key' can be checked out before an SMS reminder will be sent.

Repeat (Days) 3

Repeat (Days) reminder indicates how many days after the 'Initial SMS Message' is sent will all subsequent messages be sent until the 'Key' is checked back in.

Confirm Check-Out

Cancel

- The top of the screen shows the Agent who belongs to the Property and their cell phone number.
- You can also select the creditor (if the key is being checked out to a creditor).
Note: If a cell phone number does not show, you can enter it yourself.
- These people will get a SMS (text) reminder if the key does not come back in the allocated time.
- **SMS Repeat Reminder (Message):** This is what will show on the Text that goes out.
- **Initial (Days):** Whatever number you put here, is the number of days that Palace will wait before it sends out the reminder text.
- **Repeat (Days):** Whatever number you put here, is the number of days that Palace will wait after the initial text goes out, before it sends a reminder. It will keep doing this until the key has been checked back into Palace.
- Click on Confirm Check-Out
- Click Yes to the Pop Up Message
- The Property Key Check Out Ledger report will appear for you to print out (Note: Please dispose of this report correctly).
- Close the report and it will take you back to the Advanced User Key Management screen.
- Click Close

Kadi Property Management Upper Hutt

Property Key Check Out Ledger (CONFIDENTIAL)

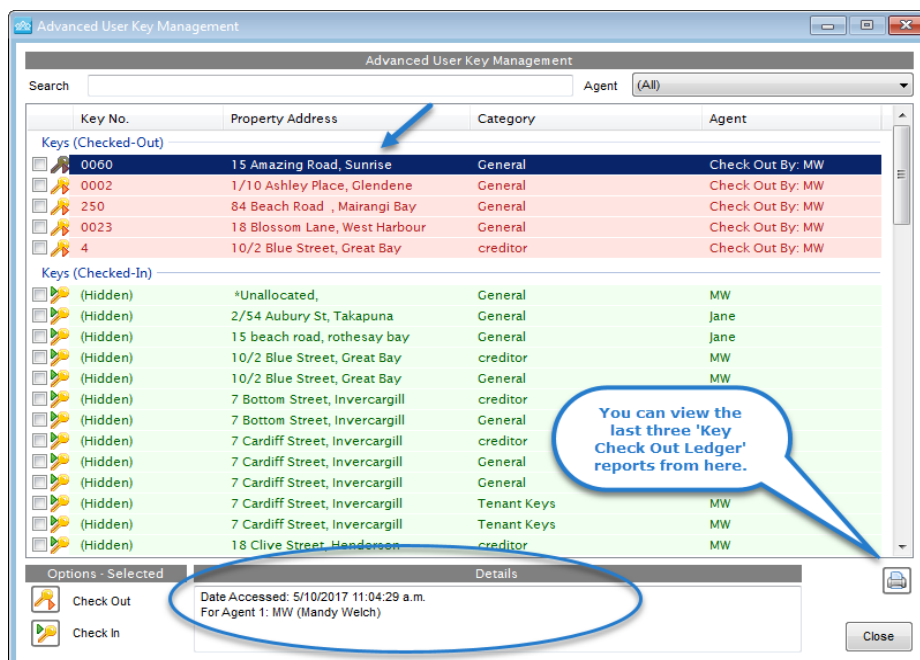
Check Out Date / Time: 5/10/2017 11:04:19 a.m.

Processed By: Mandy Welch
 Checked Out For (Agent): MW (Mandy Welch) ()
 Further Details:

| Key No. | Property Address | Category |
|---------|-------------------------------|----------|
| 0060 | 15 Amazing Road, Sunrise | General |
| 0002 | 1/10 Ashley Place, Glendene | General |
| 250 | 84 Beach Road , Mairangi Bay | General |
| 0023 | 18 Blossom Lane, West Harbour | General |
| 4 | 10/2 Blue Street, Great Bay | creditor |

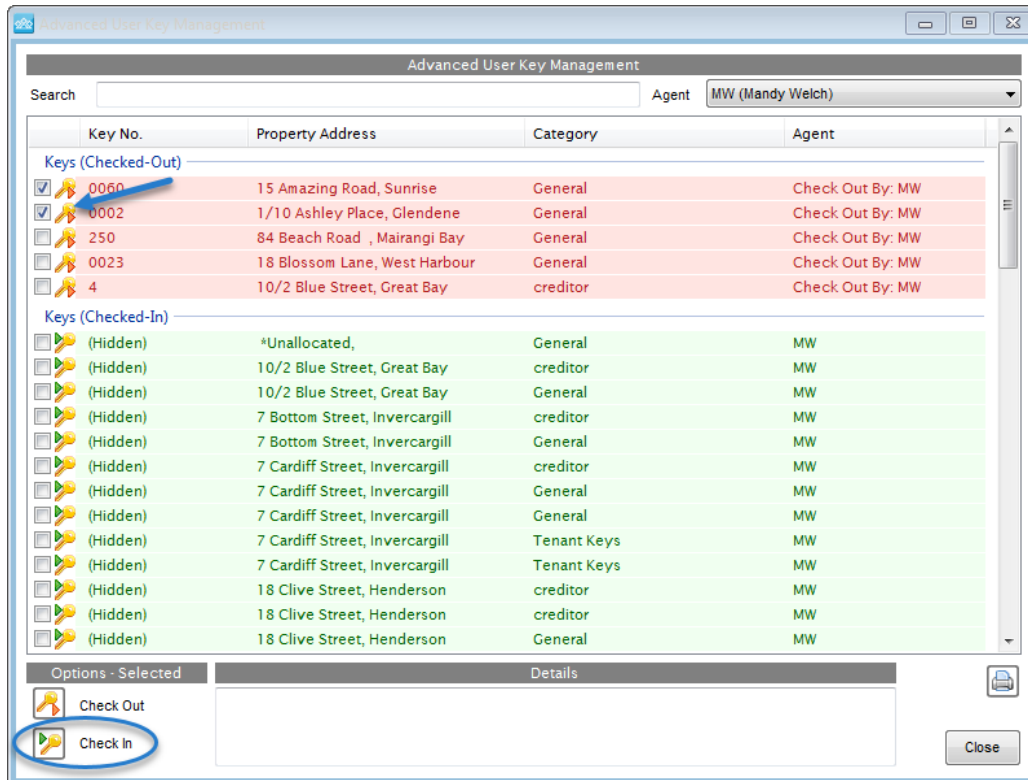
To see Keys checked out to whom and when:

- Highlight and it will show in the Details area

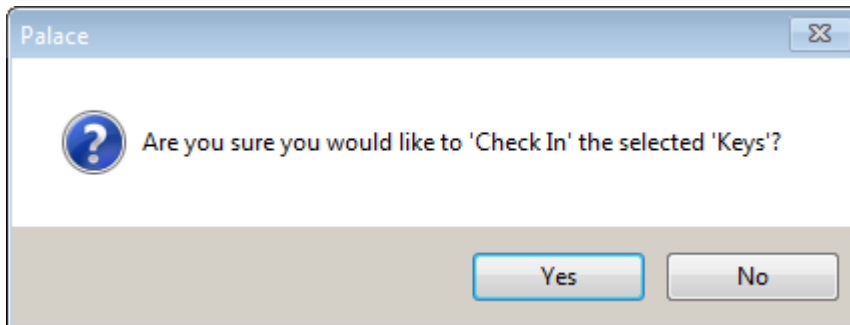


Checking the Keys back in

- Click on View
- Click on System Keys (User)
- The keys that are checked out will show at the top of the screen in red
- Select all the keys you want to check back in
- Click on the Check In icon (bottom of the screen)



- Click Yes to the Pop Up Message



- All done, you can now click Close