



# Key Check Out System

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

*Also 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.*

## Setting up the Key System Initially

Only users with admin authority can access the set up area. Authority is given under the User Setup.

### SMS Defaults

You will need to be using the SMS system in Palace and must be on auto top up. (Palace team would have set this up for your

**Auto Top Up:** This is where Palace monitors your SMS usage and when you go down to the level you selected i.e 50 texts, Palace will auto top to the top level you selected i.e 250 (or more depending on the size of your company). Please contact support on [support@getpalace.com](mailto:support@getpalace.com) to arrange this.

When you check out a key, the system will send out a reminder text after the keys has been out a set amount of days. To set up this default

- Go to system
- Click on defaults
- Down the bottom of the left side you will see Advanced Key System
- Fill out your choices and click on Save Changes (Top Right hand side)

**Advanced Key System**

Initial (Days)	Repeat (Days)
<input style="width: 90%;" type="text" value="3"/>	<input style="width: 90%;" type="text" value="2"/>

SMS Repeat Reminder (Message)

Please make sure the key is returned within 3 working days unless other arrangements have been made. You will receive this text every 2 days until key is returned

**Note:** If you do not want to send out an SMS, then change the initial days and repeat days to 9999  
You can also change this setting on each log out on an individual key

## 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 to 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 – Suppliers. Then you would assign the other bunch of keys to general.

That way when a Supplier needs the key, you would just check out the key under the Category –Suppliers because you would then know he has only got the key he needs and not the whole bunch.

- To set up your categories
- Click on System
- Click on List Defaults

System > List Defaults

Back Save changes

List Category

Key System - Categories

Description	Active
creditor	<input checked="" type="radio"/> YES <input type="radio"/> NO <input type="button" value="✕"/>
General	<input checked="" type="radio"/> YES <input type="radio"/> NO <input type="button" value="✕"/>
Tenant Keys	<input checked="" type="radio"/> YES <input type="radio"/> NO <input type="button" value="✕"/>

Add +

- Click on the drop down arrow under List Category and select Key System
- Then click on the Add button to add your categories
- Make sure it says Yes under Active
- Click on Save Changes

## To view the list and add a new key or (an extra key)

When you first set up the Key System you will need to assign each property a key (or keys). You can do this against each property under Property Edit or you can do in the main Admin set up.

- Under System, click on system Keys (Admin)

System Keys (Admin)

Key Code	Category	Status	
0002	General	In	Edit   Delete   Check Out

Search

Showing 20

Street	No.	Suburb	Keys (total)	Keys (checked out)	Key instructions
(*) beach road	15	rothesay bay	0	0	1230.
(*) Bell Street	3 / 5	Te Aro	0	0	
(*) Blue Street		Great Bay	0	0	
*Unallocated			1	0	
Ashley Place	1/ 10	Glendene	1	0	
Aubury St	2/ 54	Takapuna	1	0	

- 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 assign the keys to a Category.  
**Note:** All keys will be auto assigned to the category – General.
- When you select a property in the list, if there are keys already assigned they will show in the top box.
- Find the property and highlight
- Move the mouse to the far right column and click on action – Add Key

### Property key

Category:  Key Code:

- Select the category from the drop down box
- Type in the key number – It will warn you if the number has already been added.
- Close if finished otherwise add more keys

### **Editing a current Key Record**

- If you need to change the key category
- Click on the property in the list, The box at the top of the screen will fill in
- Click on Edit next to the key you want to change
- Select the new category from the drop down

## Checking key out per Property

You can check out one key at a time per property (Or you can do multiple keys under System – System Keys User)

The instructions below are for a single property.

- Go the Property List
- Find the property, and click on it or click on Edit
- On the front page down the bottom on the right hand side you will see the Key Number area

**Key number**

Key number:

Checked in keys: [Add new](#) | [Check out](#)

General

Checked out keys

Check in:

- Click on the drop down arrow in the Add New/Check out area
- Select the category e.g General
- Click on Check Out

Advanced key management - checkout

SMS (Primary Agent)	Mobile No. (Primary Agent)
<input type="text" value="Mandy Welch"/>	<input type="text" value="027 276 7748"/>
SMS (Secondary Agent)	Mobile No. (Secondary Agent)
<input type="text" value="Select agent"/>	<input type="text"/>
SMS (Supplier)	Mobile No. (Supplier)
<input type="text" value="Green Acres"/>	<input type="text" value="0275 882 800"/>
SMS (Other)	Mobile No. (Other)
<input type="text"/>	<input type="text"/>
SMS Repeat Reminder (Message)	
<input type="text" value="Please return keys within 2 working days unless other arrangements have been made"/>	
NOTE: Please do NOT include the Property Address in the message. This will be added in automatically.	
Initial (Days)	
<input type="text" value="2"/>	
Initial (Days) reminder indicates how many days a key can be "Checked out" before a reminder is sent.	
Repeat (Days)	
<input type="text" value="2"/>	
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.	
<input type="button" value="Confirm check out"/> <input type="button" value="Close"/>	

- The top of the screen shows the User who belongs to the Property and their cell phone number You can also select the supplier (if the key is being checked out to a supplier) Note: If a cell phone number does not show, you can enter it yourself.

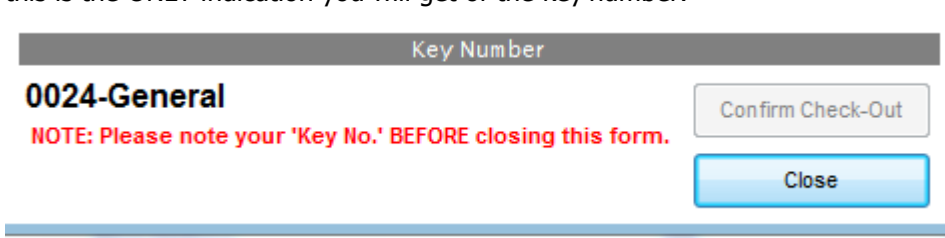
- These people will get a SMS (text) reminder if the key does not come back in the allotted time.

- SMS Repeat Reminder (Message): This is what will show on the Text that goes out.

- SMS Timing: Initial Days: Whatever number you put here is the number of days that

Palace will wait before it sends out the reminder text.

- SMS Timing: 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 in.
- Click on Confirm Check Out
- Down the bottom of the screen the key number pops up
- Write down the Key Number (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 Key in per Property

- Go to the Property List, click on property or click on Edit
- In the Key Number area, click on Check In

The screenshot shows a web interface for checking a key in per property. It features a blue header bar with the text "Key number". Below this, there is a text input field containing "0012". Underneath the input field, there are two sections: "Checked in keys" and "Checked out keys". The "Checked in keys" section includes a link "Add new | Check out" and a dropdown menu currently displaying "General". The "Checked out keys" section includes a link "Check in" and an empty dropdown menu.

- Pick up the key that you are checking back in
- Click on Check in

## Checking out 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 System

Choose Default Keys Users

- Click on Checked In Keys
- Tick the properties that you want
- Click on Check Out Keys – Top right hand side of screen

SMS (Primary Agent)	Mobile No. (Primary Agent)
<input type="text" value="Mandy Welch"/>	<input type="text" value="0212414996"/>
SMS (Secondary Agent)	Mobile No. (Secondary Agent)
<input type="text" value="Select agent"/>	<input type="text"/>
SMS (Supplier)	Mobile No. (Supplier)
<input type="text" value="Green Acres"/>	<input type="text" value="0212414496"/>
SMS (Other)	Mobile No. (Other)
<input type="text"/>	<input type="text"/>
SMS Repeat Reminder (Message)	
<input type="text" value="Please make sure the key is returned within 3 working days unless"/>	

NOTE: Please do NOT include the Property Address in the message. This will be added in automatically.

Initial (Days)

Initial (Days) reminder indicates how many days a key can be "Checked out" before a reminder is sent.

Repeat (Days)

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.

- Fill out the screen in needed
- Click on Confirm Check out
- It then shows Download Report at the bottom left hand side
- Click on that and print report.

## Checking in multiple keys at the same time

- In the Checked out tab
- Select the keys you are checking back in
- Click on Check In

Done.

## Key Reports

There are a couple of reports available

Key log reports  
Key List report

These are authority based so not all users will be able to see them

### Key Log

- Under Settings
- System key user
- Top right hand side click on Print
- This will show you a list of the key logs – which are a list of the keys that were bulk checked out.

### Advanced Key Tracker Report

- Go to Property Reports on left side of screen under Property
- Select Property – Advanced Key Tracker
- You should only be able to see this if you have authority
- Generate Report