



# Palace Information Centre - Palace Log in website for Owners

The Palace Information Centre is a website for Owners and Tenants to access and view their own information.

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Owners can see their monthly statements, year end statements, transactions, invoices or any external document that you have uploaded. They can send you a message from the website (and view your replies) and check that their own details are correct.

They login to the website directly at [www.palace.co.nz](http://www.palace.co.nz) or via your own company website with a user name and password which has been generated in Palace. The information and the website are completely secure.

**Note:** *Tenants cannot log in unless the corresponding Owner has also had a password generated*

There are a few things you need to set up first:

Contact [support@realbaselive.com](mailto:support@realbaselive.com) to make sure this service has been set up for you.

Contact your IT person and get the shortcut link set up on your website for the Owners/Tenants to log in. (There is a code link that Realbase can send to your IT person) This option picks up your branding for the Information centre.

Set up the Company Defaults and make the selection for information that you wish to upload, and customise the website by uploading your logo

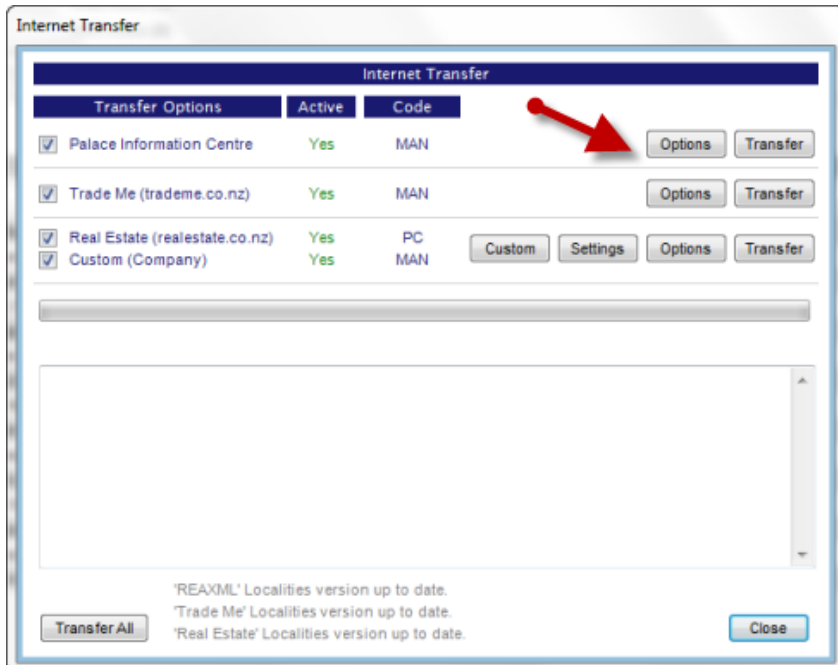
Generate Login ID's and passwords for your Owners and contact the Owners with their login information.

Do your first data transfer and try out the site.

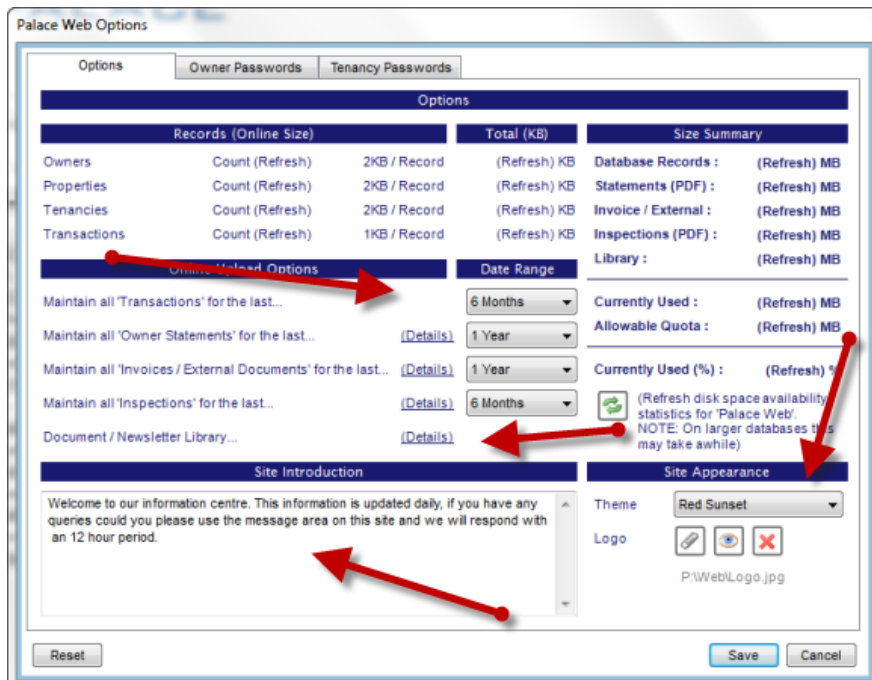
## Setting up the custom website

When you first use the Palace Information Centre, you can choose whether the information starts from now or whether you want to send historic information.

- Click on Internet Transfer - on the left hand menu



- Click on Options - (Next to Palace Information Centre)



See below for the breakdown of the company area.

## Option Tab breakdown

**Records (Online Size) (1):** This area tells you how much data you currently send up e.g In the sample you can see that 9 Owners currently have information being transferred to the web.

**Online Upload Options (2):** This area allows you to select how long you want the information to stay up on the website. i.e You might want owner statements to stay up for a whole year but transactions to only stay up for 3 months.

Some of the options also offer you the choice of having information prior to your first upload to the website available as well e.g you can upload the previous 6 months of statements if you wish. If you first use the website in October, you might want to backdate statements and invoices for the past 6 months back to the start of the financial year.

All date ranges work from the current date, so if you pick 1 year - the year will go from today's date.

**Maintain all "Transactions" for the last ...** This refers to all the day to day financial transactions for each Owner, Properties and Tenant, select how long you would like the information to stay on site.

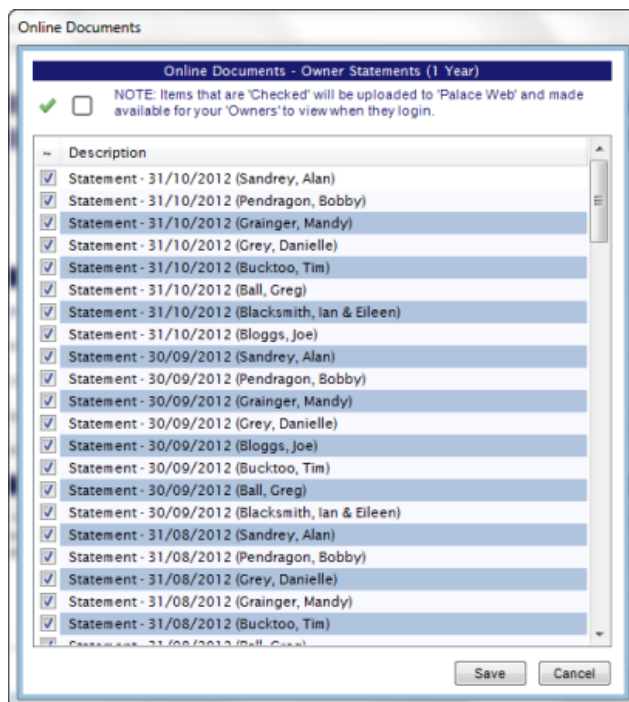
**Maintain all "Owners Statements" for the last ...** Select how long you would like the statements to stay available to the Owners. By clicking on the details button you can also upload previous statements. (The date range works for both activities)

**Maintain all "Invoices / External Documents" for the last ...** Select how long you would like the Invoices or any External Documents to stay available to the Owners. By clicking on the details button you can also upload previous Invoices etc. (The date range works for both activities)

**Maintain all "Inspections" for the last ...** This only refers to Palace Mobile Reports. Select how long you would like the inspections Report to stay available to the Owners. By clicking on the details button you can also upload previous Inspection Reports (The date range works for both activities)

Follow these Instructions for setting up the above

- Choose how long you want each of the above to stay on the website, then Click on details.



- The records that show will depend on the date that you select i.e 6 months. If you don't want everything for 6 months only select the ones you do want.

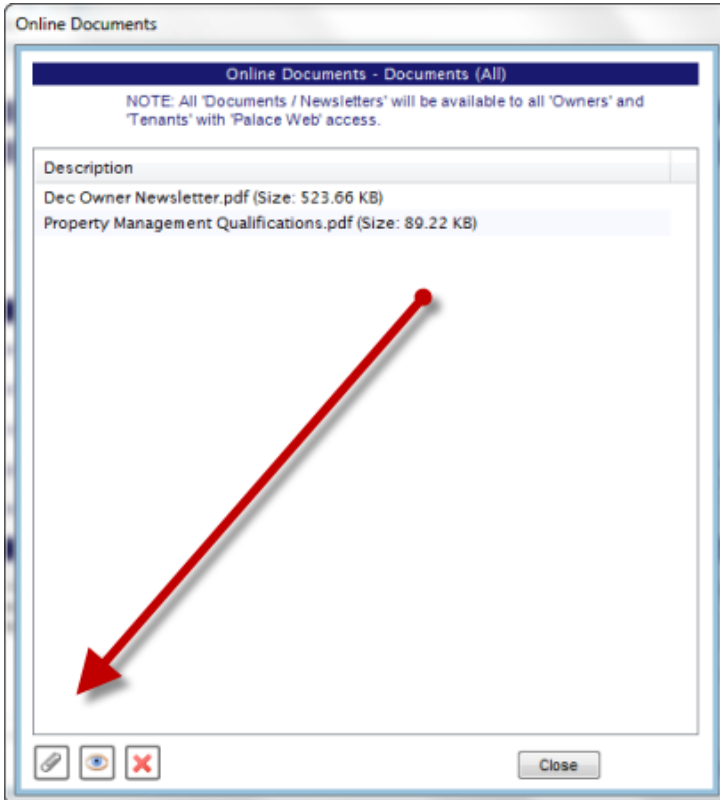
- Click save.

Once these have been set up, Transactions, Owner Statements, Inspection Reports and Creditor Invoices when attached to an external file will automatically tick themselves as "online"

**Document / Newsletter Library:** You can upload any document to this area (suggest PDF document) and it will be made available to all the Owners that are registered to use the Palace Information Centre.

### **To add a document**

- Click on details next to 'Document / Newsletter Library'



- Click on Import - find the saved document and click open.
- The document will show in the window
- Close window - This will now go up in the next upload and the document will show on all the owner log ins.  
**Note:** if you want to delete a document, right click the document and click on "delete file"

**Site Introduction:** This shows on the front page of the Palace Information Centre for all log ins. You can come to this area and update it at any time.

**Size Summary:** This area shows the size of each section that has been uploaded to the Information Centre. It is totalled in the "Currently Used" area. The total size used may affect your monthly charges for the Palace Information Centre. It must not exceed 2000mb, if it is getting close – Contact Realbase

### **Site Appearance**

**Theme:** Select the theme that you want from the drop down list. You can see the change in the Information Centre immediately by refreshing your webpage.

**Logo:** You can upload your logo here to show in the Information Centre – The logo should be a JPEG and be no more than 80 pixels high. The length can be determined by you, as to whether you want it to go across the whole screen or not.

Click on the (paperclip) icon, browse to where your logo is kept and click open, then click save

Once all set up – Click on Save.

## Generating Log Ons and Passwords

The system auto generates passwords for Owners and Tenants. These passwords are individual to that person, once they log in they will only see their own information. They cannot access Palace itself.

When you start using the Palace Information Centre, you have the choice to only generate passwords for selected owners or to generate for the whole lot. The passwords are made up of letters that are randomly selected. If an owner wishes to change their password, they need to let you know and you can change it for them.

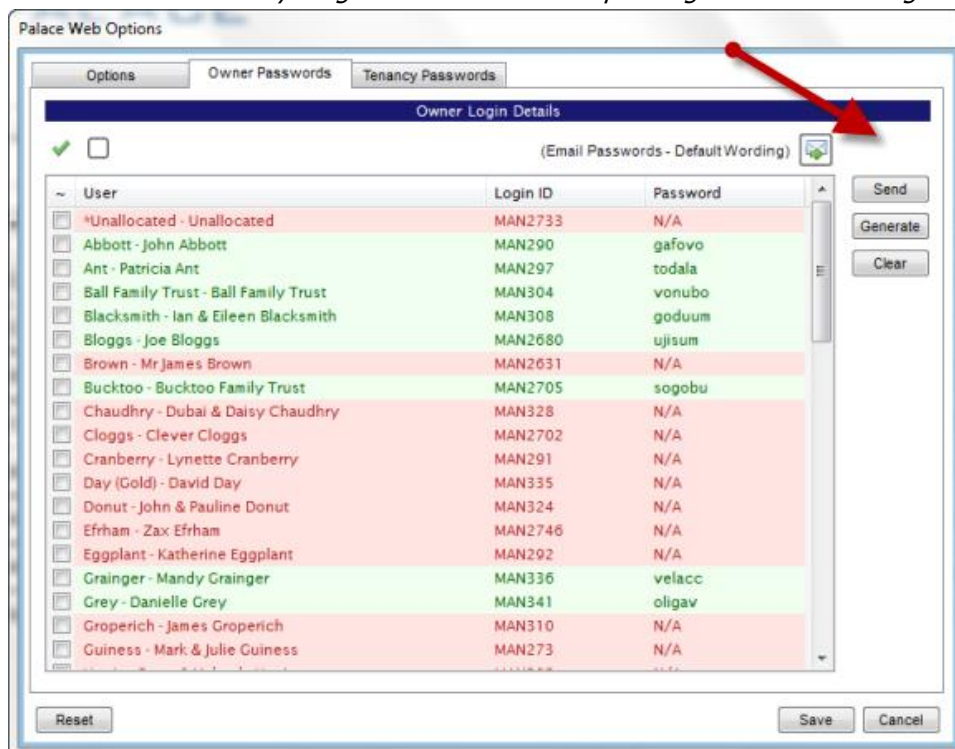
Charges for the Palace Information Centre are dependent on the amount of disk storage needed. We recommend that you get Owners' confirmation that they will use the web site before allocating them a password.

Once a password has been generated, a transfer needs to be done so that the Owner can use their login. However, please note that if you have generated passwords for a new owner, he will not be able to log in until some transactions have been created against his record and you have transferred them to the Information Centre.

### To generate the passwords

- Click on Internet Transfer (Left hand side menu)
- Click on Options (Next to Palace Information Centre)
- Click on Owners Tab (or Tenants)

**Note:** *Tenants can only be generated if the corresponding owner has been generated.*



- Select the required Owners
- Click on "Generate"
- A Login ID and a Password will be generated
- If you have previously told your Owners about the Information Centre, then select the relevant owners and click on the "send" button. A pop up screen will appear, click Yes and an email will be automatically sent to any selected Owners giving them their passwords etc.
- Click save when finished

**Note:** *If you wish to send your owners a letter informing them about the Palace Information Centre and giving them their Logins and Passwords, you will find a sample letter set up in the document template area, contact Palace for a copy if you cannot find one. See the mailmerge help file for more instructions*

If they have lost their password and just want a new one, you can just select them and click on generate, Palace will then generate them a new random password.

**Further Note:** *When you generate a new Owner Password, you must do a transfer before the owner will be able to access their Information.*