



# Inspections

Palace has an area called Property Inspections under the Property tab. Any managed active property will show in this 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.

Setting Up Inspections	Page 1 - 2
Inspection Report for upcoming Inspections	Page 3
Inspection Notification Letters in Bulk	Page 4 - 5
Processing the Inspection	Page 6
Producing an Inspection Report for the Owner	Page 7

## Setting up Inspections

As mentioned above, a new managed property, once entered into Palace, will show in the 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 Property Manager and grids 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 in Property - Property Inspections
- Filter by Property Manager if needed

Property	Grid	Agent	Frequency	Next inspection date	Charge	
Great North Road (7) ,Henderson, Auckland	Henderson	MW	12/Week(s)	24/07/2015	\$45.00	Edit
Matthews Street (2/17) ,Hillsborough, Christchurch	Yellow	MW	2/Week(s)	24/07/2015	\$45.00	Edit
Willow Street (A/123) ,Mangapapa, GISBORNE	Blue	MW	12/Month(s)	24/07/2015	\$45.00	Edit
Felgrove Street (2/4) ,Glendene, Auckland	Glendene	MW	13/Week(s)	8/09/2015	\$45.00	Edit
Clive Street (18) ,Henderson, Auckland	Henderson	MW	1/Week(s)	9/03/2016	\$0.00	Edit

- Click on the column header "Next inspection date" to find any property marked N/A - This means it is not yet set up for an inspection.

Charge  
Date Entered: 24 August 2016 07:33:05 PM

More ▾ Back Save & close

**Details**

Description

Start date  
24-08-2016

Charge  
\$ 0.00

Repetitive period

Frequency  
Days(s)

Ledger Account

**Options**

Group

Primary user  
(System)

Include print  NO

Processed  NO

- Find the property and click create
- Some of it has already been set up for you. Double check you have the right property manager connected to this inspection (i.e if you have a specific person who does Inspections make sure you link this to them)
- 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.
- 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 says "Inspection Fees"
- Click Save & Close.

**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 "Property Charges" tab on the date it is due, so that you can charge it through.

## Preparing for your Inspections

Print the upcoming inspection report

Prepare and send the Inspection Notification Letter to your tenants

### Inspection Report

**Property Reports – Inspections:** This report is 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 tab - Property Reports – 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.

### Kadi's Property Management

### Inspection Report

Between 29/10/2014 And 29/11/2014 By Street For Unprocessed Entries Only

Due Date	Property and Tenant Details	Grid	Key No	Key Detail
Agent:	Mandy Welch			
20/11/2014	1/24 Enter Drive, Te Atatu Peninsula, Au	Henderson	0018	Alarm 4587#
Charge	Owner Marion Maurice		Phone (H) 834 6478	Phone (W)
	Tenant Name Fred & Wilma Victory			
	Rent 530.00 / Week			
	Phone (H) 832 1777			
	Phone (Mob) 0212414996			
30/10/2014	99 Glenhaven Place, Te Atatu, Auckland	Te Atatu	0026	ALARM 3333
Charge	Owner Bucktoo Family Trust		Phone (H) 03 5554895	Phone (W) 03 5555522
	Tenant Name Graeme Rama			
	Rent 250.00 / Week			
	Phone (H) 834 3133			
23/11/2014	29 Grover Drive, Te Atatu Peninsula, Au	Takapuna	0028	
Advanced	Owner Diane Williams		Phone (H) 09 789 5468	Phone (W) 09 789 5478
	Tenant Name John Kyle			
	Rent 350.00 / Week			
	Phone (H) 834 1274			
19/11/2014	67 Hereford Street, Te Atatu, Auckland	Red	0009	
Charge	Owner Dubai & Daisy Chaudhry		Phone (H) 414 2577	Phone (W) 653 1456
30/10/2014	45 Holdsworth Ave, Trentham, Upper Hu	Green	0007	Alarm code 5768
Charge	Owner Jameson Family Trust		Phone (H)	Phone (W)
	Tenant Name John Longman, Sarah Smith, Michelle May & Bob Allen			
	Rent 250.00 / Week			
	Phone (Mob) 0212414996			

- 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, Processed or Both
- Unprocessed - 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 Options: Choose from Street, Grid or Date.
- Click on generate- The report will look like this.

**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:** - click a tenant – edit arrow options, go to Diary, click on correspondence - see Diary help file for more information

### Bulk mail merge for many tenants

This is set up under the custom views area, please see Custom view help file to set up a custom view

- Click on Property – select Tenant list custom view
- Select the tenants you would like to send a letter by ticking them
- Check it off against the Reports
- Select the template you would like from the top right hand side
- Click Generate template

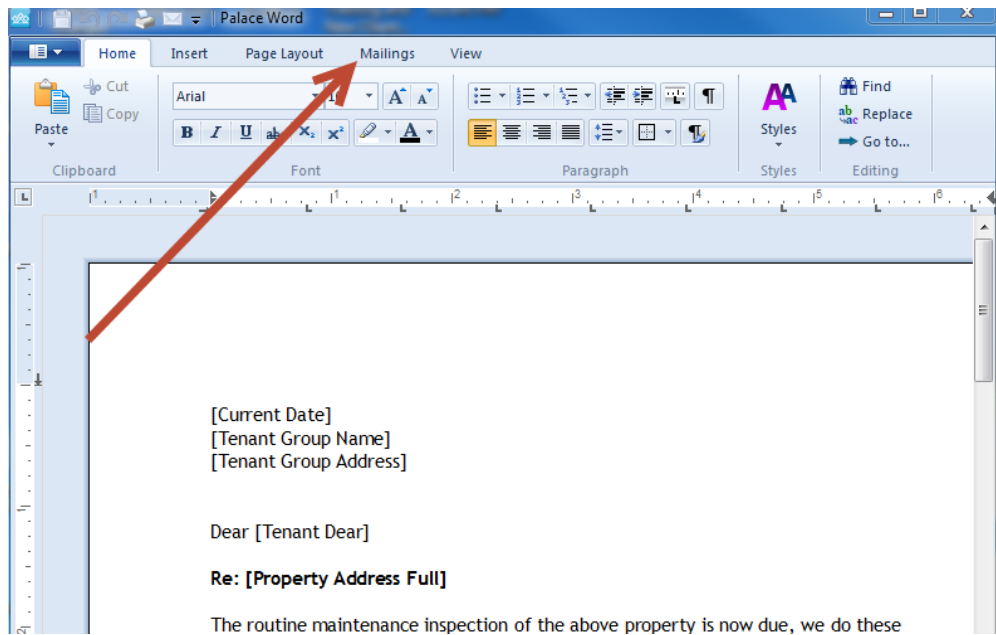
**Note:** If you are using Grids and want to filter by Grid, then click on Filter and choose By Reminders, Click on the Funnel, then pick the group inspections and you can then filter by Grid

- This will take you to the letter.

The screenshot shows the 'Tenancy > Tenant List' interface. At the top right, there is a dropdown menu for 'Select a template' with 'PAL - Notice to Terminate Tenancy Agreement' selected, and a 'Generate Template' button. Below this is a search bar and a 'Showing 10' dropdown. The main content is a table with the following columns: Tenant Full Name, Tenant Group Address, Tenant Current Rent, Tenant Current Rent Period, Tenant Group Days Overdue, and Tenant Group Rent Paid To Date. The table contains five rows of tenant data, each with a checkbox in the first column.

	Tenant Full Name	Tenant Group Address	Tenant Current Rent	Tenant Current Rent Period	Tenant Group Days Overdue	Tenant Group Rent Paid To Date
<input type="checkbox"/>	Robert abd Aaron		0.0000		0	15/02/2008 12:00:00 AM
<input type="checkbox"/>	Baby Elephant		0.0000		0	22/05/2015 12:00:00 AM
<input type="checkbox"/>	Bob Cratchett & Sue Blue & Geoff Deft		0.0000		0	17/05/2016 12:00:00 AM
<input type="checkbox"/>	hstywsya wysthss		0.0000		0	17/05/2016 12:00:00 AM
<input type="checkbox"/>	Poppy Montgomery		0.0000		0	17/05/2016 12:00:00 AM

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



- Click on Mailings and then you can click on the blue arrows to see the merge and when you are ready click on the Big Merge and Print button
- Follow the prompts through
- When completed close out, or repeat the procedure with Email All.
- If necessary Under Control Mail Merge Tenants, 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 Property Charges Tab
- You will see two separate areas. Chargeable and Insufficient Funds. Chargeable means the owner has enough money and you can process them. You can process the Insufficient funds as well 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 it's due date, go into the Property- Property Inspections area and adjust the next date to the date you completed it. Return to the Home screen reminders to see that inspection in the list.

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

Dashboard

WEEKLY RENT \$0.00 LEASES 0 WORK ORDERS 2

Home Reminders (27) **Property Charges (7)** Tenancy Invoice (0) Supplier Invoice (2)

Current

**Property (Chargeable)**

Property (Chargeable)	Date	Frequency	Amount	Total
<input checked="" type="checkbox"/> Admin/Statement Fee - Property: 1/24 Enter Drive, Te Atatu Peninsula, Auckland	25/03/2016	MW	\$15.00	\$2,756.25
<input checked="" type="checkbox"/> Routine Inspection - Property: 878 New North Road, Mt Eden, Auckland	25/03/2016	MW	\$45.00	\$11,354.00
<input type="checkbox"/> Statement Fee - Property: 7 Cardiff Street, Invercargill, Web ID 12345	26/04/2016	MW	\$2.50	\$383.67
<input type="checkbox"/> Administration Charge - Property: 7 Cardiff Street, Invercargill, Web ID 12345	26/07/2016	MW	\$4.00	\$383.67
<input type="checkbox"/> Statement Fee - Property: 7 Cardiff Street, Invercargill, Web ID 12345	28/07/2016	MW	\$5.00	\$383.67
<input type="checkbox"/> Postage and Petties - Property: 3/46 Golf Road, Titirangi, Auckland	18/08/2016	MW	\$3.50	\$56,462.13
<input type="checkbox"/> Monthly Admin Fee - Property: 2/17 Ghuznee St, Wellington, Auckland	24/08/2016	MW	\$5.00	\$989.25

**Property (Insufficient Funds)**

Property (Insufficient Funds)	Date	Frequency	Amount	Total
<input type="checkbox"/> Statement Fee - Property: 2/4 Felgrove Street, Glendene, Auckland	20/04/2014	MW	\$2.50	-\$452.54
<input type="checkbox"/> Monthly Admin Fee - Property: 18 Clive Street, Henderson, Auckland	24/01/2015	MW	\$5.00	-\$283.85
<input type="checkbox"/> Admin Fee for Postage etc - Property: 43 Flanshaw Road, Henderson, Auckland	23/04/2015	MW	\$12.00	-\$61.60

- 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. Each property diary and the property inspection area will be updated.

## Producing an Inspection Report for a Property

This is for a manual report, if you would like information on the report produced by the iPad or iPhone, see separate topic.

You can add your own photos

There are sample templates that we have supplied and you can edit them through System - 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 Generate
- Fill in the details and insert photos as needed
- Once you have finished, you can print, download or **Email.**
- **If you want to have the report as the body of the email, then instead of clicking on Correspondence, click on Email instead and then choose the template under correspondence.**

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