

**HYPERLINK** function to Scripts & Dialogues & Procedures Manual (flowchart) to assist with your communications & training

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Your logo & details will automatically appear on all documents

CL 6

Scripts & Dialogues

Asset Manager:

## INCOMING TRANSFER OF MANAGEMENT

Real estate obtaining property from: **ABC RENTAL**

Handover date: **14/08/05**

Tenant: **Mr and Mrs Smith**

Date:

Tenant phone home: **1800 000 000**

Work: **1900 000 000**

Mobile:

Property: **4 Blue Street**

Lessor: **Mr Bill Jones**

Lessor phone home: **1300 000 000**

Work: **1300 000 001**

Mobile: **0400 000 000**

Tenant rent paid to date: **10/08/05**

Rent per week: \$ **450.00**

Bond held: \$ **1800.00**

Agent to give notice (Send **INHOL5** on BLANK paper - lessor must sign letter)  lessor to give notice

Information can be completed in the computer. Trust Account merge fields can be inserted to save time

### CONFIRM AND PROCESS TRANSFER DETAILS

	PERSON	Completed
1. Send letter <b>INHOL1</b> to real estate <i>confirming transfer (electronic file)</i>	AM	<input checked="" type="checkbox"/>
2. Enter to computer diary in 4 days " <i>telephone agent to confirm receipt of letter, property</i> "	AM	<input checked="" type="checkbox"/>
3. Real estate telephoned to confirm transfer - detail conversation (Ask for the tenants name and contact numbers as listed above)	AM	<input checked="" type="checkbox"/>
4. Enter tenants details into the computer (ensure lessor and property entered)	AM	<input checked="" type="checkbox"/>
5. Enter to computer diary on handover date " <i>incoming</i> "	AM	<input checked="" type="checkbox"/>
6. Telephone tenant to discuss change over & rental	AM	<input checked="" type="checkbox"/>

The person accountable for each task can be modified

### TENANT CONFIRMATION & PROPERTY INSPECTION

1. Send letter <b>TEN 4</b> to tenant & request a routine inspection ( <i>electronic file</i> )	AM	<input type="checkbox"/>
Attach <b>F 2 Annexure "A"</b> , <b>F 28 Tenant inspection notice</b> rental payment book/card/code	AM	<input type="checkbox"/>
2. Enter to computer diary " <i>inspection, tenant name &amp; property</i> "	AM	<input type="checkbox"/>
3. Place letter & <b>F 16</b> inspection report in notice folder on the day of the inspection	AM	<input type="checkbox"/>

Place file in tenants moving in allocated area

### HANDOVER DATE

1. Collect details from real estate office -	AM	<input type="checkbox"/>
2. Confirm details received <input type="checkbox"/> Keys <input type="checkbox"/> original documents <input type="checkbox"/> Change of lessor/agent bond form <input type="checkbox"/> Application <input type="checkbox"/> Condition report <input type="checkbox"/> tenant ledger print out (if app.)		
3. Confirm computer details are correct <input type="checkbox"/> Record routine inspection date <input type="checkbox"/> rent paid to date <input type="checkbox"/> expiry date <input type="checkbox"/> bond details	AM	<input type="checkbox"/>
4. Key details entered to key register in PPM System & computer - write <b>code</b> on tag	AM	<input type="checkbox"/>
5. Photocopy keys received and place in lessor file	AM	<input type="checkbox"/>
6. Change of agent bond form signed & place in <i>bonds to be lodged</i> allocated area	AM	<input type="checkbox"/>
7. Ensure tenant has rent card/book/direct debit/code for rental payments	AM	<input type="checkbox"/>
8. Record bank reference number in computer & <b>PPM bank register</b>	AM	<input type="checkbox"/>

All documents within the checklist **HYPERLINK** to the appropriate form, letter or procedures at the click of a button

### FINALISATION PROCESS

1. Routine inspection carried out <input type="checkbox"/> No <input type="checkbox"/> Yes - update the computer (Send letter <b>PI 37</b> to lessor confirming inspection ( <i>electronic file</i> ) or detail conversation)	AM	<input type="checkbox"/>
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Authorised by:

Date:

Place in central filing

Track & monitor system changes – central index provided