

## preliminary tenant establishment

property address: \_\_\_\_\_

property owner: \_\_\_\_\_

tenant/s: \_\_\_\_\_

portfolio manager: \_\_\_\_\_ date: \_\_\_\_\_

leasing consultant: \_\_\_\_\_

tenant induction meeting: date: \_\_\_\_\_ time: \_\_\_\_\_ location: \_\_\_\_\_

tenant occupation date: \_\_\_\_\_ tenancy expiry date: \_\_\_\_\_ term: \_\_\_\_\_

rental amount: \_\_\_\_\_ per week/fortnight/4 weeks/calendar month/other (please circle)

annual rent: \_\_\_\_\_ bond: \_\_\_\_\_ pet bond: \_\_\_\_\_

special conditions: Yes/No (if yes: refer to last section of TrackMate™ for conditions)

date completed: \_\_\_\_\_

	Date	Initials
<b>LC</b> Record on TaskTracker™	_____	<input type="checkbox"/>
<b>LC</b> Confirm application has been approved and accepted by both parties	_____	<input type="checkbox"/>
<b>PMC</b> Create new tenant PM Software file	_____	<input type="checkbox"/>
<b>PMC</b> Log and enter all tenant details including contact information	_____	<input type="checkbox"/>
<b>PMC</b> Log each and every special condition and make a note tenant PM Software file	_____	<input type="checkbox"/>
<b>PMC</b> Generate tenant digital property access code for tenancy term	_____	<input type="checkbox"/>

### PREPARATION OF TENANCY AGREEMENT

**(INCLUDE ALL DETAILS AS LISTED AND REQUIRED):**

<b>PMC</b> Include and confirm all special conditions noted on Tenancy Application	_____	<input type="checkbox"/>
<b>PMC</b> Insert tenancy dates and term of tenancy	_____	<input type="checkbox"/>
<b>PMC</b> Insert rent review date allowing applicable timeframe prior to expiry of tenancy	_____	<input type="checkbox"/>
<b>PMC</b> Insert rental amount and confirm calendar monthly payments	_____	<input type="checkbox"/>
<b>PMC</b> Insert bond amount due by tenant/s	_____	<input type="checkbox"/>
<b>PMC</b> Insert pet bond amount due by tenant/s (if applicable)	_____	<input type="checkbox"/>
<b>LC</b> Confirm let fee is correct amount to be charged	_____	<input type="checkbox"/>
<b>LC</b> Confirm rental amount on tenant and property PM Software files match Adjusting accordingly if necessary	_____	<input type="checkbox"/>
<b>PMC</b> Confirm details of Strata Managers and Building By-Laws (if applicable)	_____	<input type="checkbox"/>
<b>PMC</b> Confirm if pets are approved breed, age and number (if applicable)	_____	<input type="checkbox"/>
<b>LC</b> Confirm and record digital access codes and dates (match tenancy term)	_____	<input type="checkbox"/>
<b>LC</b> Confirm amount tenant is to be charged for digital solar power (if applicable)	_____	<input type="checkbox"/>
<b>LC</b> Confirm amount tenant is to be charged for water (if applicable)	_____	<input type="checkbox"/>
<b>LC</b> Confirm any other utilities that are to be charged to tenant	_____	<input type="checkbox"/>
<b>LC</b> Confirm arrangements for gardens and lawn maintenance (if applicable)	_____	<input type="checkbox"/>
<b>LC</b> Confirm arrangements for pool maintenance (if applicable)	_____	<input type="checkbox"/>
<b>PMC</b> Confirm all details in relation to tenancy logged to tenant PM Software file	_____	<input type="checkbox"/>
<b>PMC</b> Prepare Tenancy Agreement directly from tenant PM Software file printing after verifying all details are accurate and included	_____	<input type="checkbox"/>
<b>PMC</b> Prepare bond lodgement to Company Trust Account	_____	<input type="checkbox"/>
<b>PMC</b> Prepare 'Be Our Guest' 'Tenant Welcome and Information Satchel' and letter	_____	<input type="checkbox"/>
<b>PMC</b> Confirm Incoming Property Condition report is completed, and copies printed	_____	<input type="checkbox"/>
<b>PMC</b> Print 3 copies of inventory (if applicable)	_____	<input type="checkbox"/>
<b>PMC</b> Prepare utilities connection forms (if applicable)	_____	<input type="checkbox"/>
<b>PMC</b> Create tenant paper file	_____	<input type="checkbox"/>

### ONCE THE TENANCY AGREEMENT HAS BEEN SIGNED:

<b>LC</b> Confirm property owner charged letting fee	_____	<input type="checkbox"/>
<b>PMC</b> Confirm and/or arrange invoices and payment for marketing/advertising	_____	<input type="checkbox"/>
<b>PMC</b> Remove property from websites (company/generic/etc.)	_____	<input type="checkbox"/>
<b>PMC</b> Cancel any pre-booked advertising/marketing	_____	<input type="checkbox"/>

- PMC Photocopy 2 extra copies of Tenancy Agreement and distribute copy to tenant \_\_\_\_\_
- PM Email copy of Tenancy Agreement to property owner and tenant together with Standard email template \_\_\_\_\_
- PMC Post owner copy of Tenancy Agreement to property owner together with letter \_\_\_\_\_
- PMC File original Tenancy Agreement on tenant paper file \_\_\_\_\_
- PMC Confirm smoke detector and safety switch obligations have been fulfilled \_\_\_\_\_
- PMC Confirm curtain cord compliance obligations fulfilled \_\_\_\_\_
- PMC Confirm pool safety compliance obligations fulfilled \_\_\_\_\_
- PMC Confirm carbon monoxide obligations fulfilled \_\_\_\_\_
- PMC Forward request for utilities connection to relevant provider (if applicable) \_\_\_\_\_
- PMC Schedule due date in computer for return of signed Incoming Property Condition report and inventory (if applicable) \_\_\_\_\_
- LC Check returned ingoing entry condition report/inventory and resolve any discrepancies in writing \_\_\_\_\_
- LC Prepare and dispatch letter if Ingoing Entry Condition Report not received by required date \_\_\_\_\_
- FC Confirm bond has been paid in full as per Tenancy Agreement \_\_\_\_\_
- FC Transfer bond to relevant authority or trust and record transaction \_\_\_\_\_
- PMC Confirm bond has been transferred to Company Trust Account \_\_\_\_\_
- PMC Confirm bond transaction number is recorded to tenant PM Software computer file \_\_\_\_\_
- PMC Arrange a 'Rented' Sticker to be placed on the 'Rent ME' sign at property \_\_\_\_\_
- PMC Arrange for 'Rent Me' sign to be removed (2 weeks after tenancy start date) \_\_\_\_\_
- PMC Advise ingoing tenants sign will remain at property for period of 2 weeks \_\_\_\_\_
- PMC Record schedule for sign collection \_\_\_\_\_
- PMC Log number of days property was on market on property computer file \_\_\_\_\_

PMC All relevant information and documents, as below, filed on tenant file \_\_\_\_\_

**Copies of documents and order of filing on tenant file AND/OR computer file**

	P	C
• Application form with completed questionnaire, copies of ID	<input type="checkbox"/>	<input type="checkbox"/>
• Tenant data base search reports	<input type="checkbox"/>	<input type="checkbox"/>
• Application TrackMates™	<input type="checkbox"/>	<input type="checkbox"/>
• Original Tenancy Agreement	<input type="checkbox"/>	<input type="checkbox"/>
• Bond transfer receipt	<input type="checkbox"/>	<input type="checkbox"/>
• Incoming Property Condition report	<input type="checkbox"/>	<input type="checkbox"/>
• Inventory if applicable	<input type="checkbox"/>	<input type="checkbox"/>
• Signed photocopy of keys handed to tenant (digital access code)	<input type="checkbox"/>	<input type="checkbox"/>
• Utilities Connection form and email confirmation if applicable	<input type="checkbox"/>	<input type="checkbox"/>
• Welcome Letter	<input type="checkbox"/>	<input type="checkbox"/>
• Acceptance and Signatory of Tenancy Agreement TrackMate™	<input type="checkbox"/>	<input type="checkbox"/>
• Returned Incoming Property Condition report or letter advising non-return of condition report	<input type="checkbox"/>	<input type="checkbox"/>
• Returned inventory or letter advising non-return if applicable	<input type="checkbox"/>	<input type="checkbox"/>
• Confirmation of bond advice	<input type="checkbox"/>	<input type="checkbox"/>
• Copies of all marketing and advertising at time of application	<input type="checkbox"/>	<input type="checkbox"/>
• Preliminary Tenant Establishment TrackMate™	<input type="checkbox"/>	<input type="checkbox"/>

**Special conditions:**

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**TrackMate™ verified for completion:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**NB:** If any item is not applicable write next to item N/A. Leasing Consultant may be represented by Portfolio Manager.