

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: _____ security deposit: _____ pet security deposit: _____

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

date completed: _____

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

PREPARATION OF TENANCY AGREEMENT

(INCLUDE ALL DETAILS AS LISTED AND REQUIRED):

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

ONCE THE TENANCY AGREEMENT HAS BEEN SIGNED:

LC Confirm property owner charged letting fee	_____	<input type="checkbox"/>
PMC Confirm and/or arrange invoices and payment for marketing/advertising	_____	<input type="checkbox"/>

- PMC Remove property from websites (company/generic/etc.) _____
- PMC Cancel any pre-booked advertising/marketing _____
- 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 Move In 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 Move In Report not received by required date _____
- FC Confirm security deposit has been paid in full as per Tenancy Agreement _____
- FC Transfer security deposit to relevant authority or trust and record transaction _____
- PMC Confirm security deposit has been transferred to Company Trust Account _____
- PMC Confirm security deposit 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"/>
• Security deposit transfer receipt	<input type="checkbox"/>	<input type="checkbox"/>
• Move In 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 Move In 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 security deposit 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:

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.