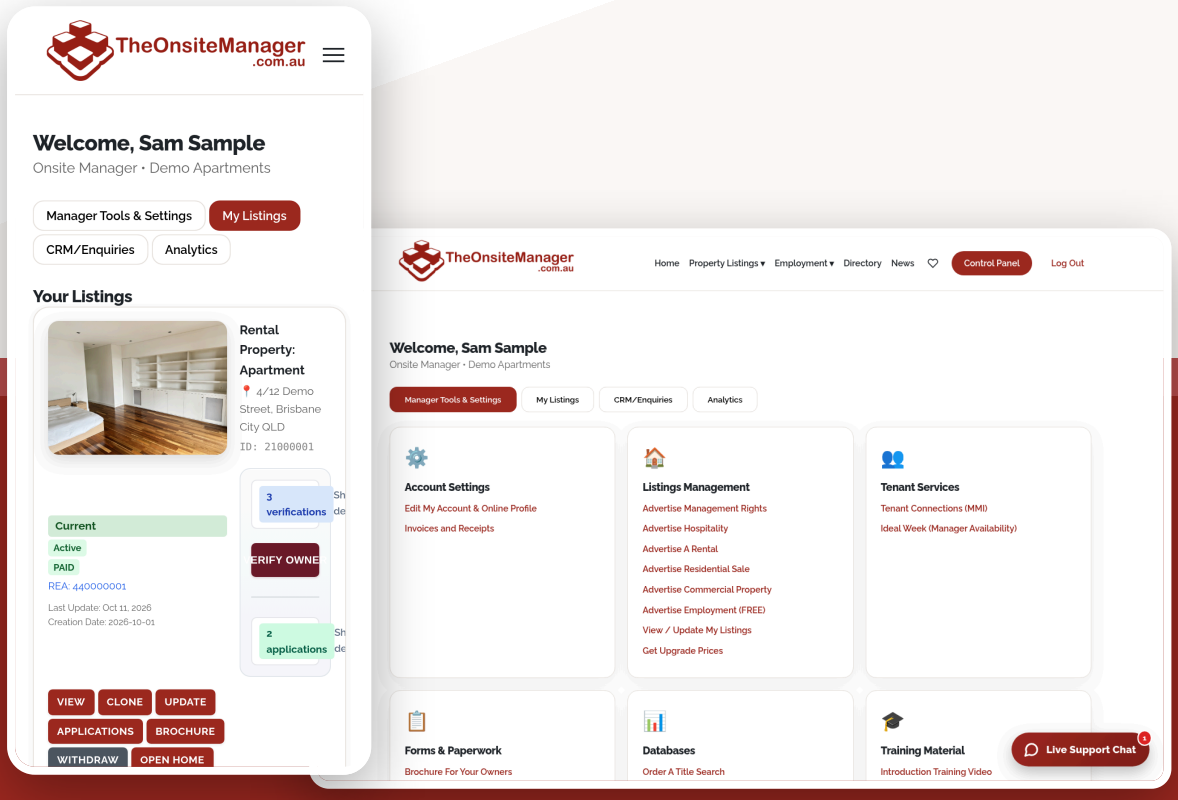
TRAINING MANUAL FOR ONSITE MANAGERS

Using TheOnsiteManager

A step-by-step guide to listings, portals, payments, enquiries, VERIFII rental applications, AML/CTF verification, THE Inspection Manager, The Form Manager, reminders, the CRM Calendar and the agency tools, on desktop and mobile.



TheOnsiteManager.com.au

Version 1.8 · October 2026

Screenshots use fictitious demo data. Prices are indicative and change.

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CHAPTER 1

Welcome and how to use this manual

Who this manual is for, how it is laid out and what the symbols mean.

In this chapter

- What TheOnsiteManager does for you as an onsite manager
- How the manual is organised, and how to find answers fast
- What the screenshot labels, tips and warnings mean

1.1 What TheOnsiteManager does for you

TheOnsiteManager.com.au is the agency and online platform behind your letting and sales work as an onsite manager. Once you log in, you can:

- advertise rentals, residential sales, commercial property, management rights, hospitality businesses and jobs;
- send your listings to the big portals, including **realestate.com.au (REA)** and **Domain**, through one wizard;
- take enquiries and inspection bookings, and see them all in one CRM;
- run rental applications through **VERIFII**, our identity-verified application system;
- do the identity checks (customer due diligence) required by Australia's **AML/CTF** laws for owners, vendors and purchasers;
- prepare leases and tenancy forms in **The Form Manager**, and use agency tools such as **RealWorks** (REIQ forms, FULL plan), **Pricefinder**, the **National Tenancy Database** and title searches;
- pay for portal advertising and find your invoices and receipts;
- chat to the support team from inside the Control Panel.

You act as a Licensed Real Estate Agent (LREA) under TheOnsiteManager's principal agency licence. That brings some rules with it, covered in Chapter 23 (Acceptable Use) and Chapters 17–19 (AML/CTF).

1.2 How this manual is organised

Part	Chapters	Use it when…
A. Getting started	2 Logging in · 3 Control Panel · 4 My Listings	you are new, or you can't find something
B. Advertising	5 Listing wizard · 6 Listing types (incl. UAE) · 7 Photos and floorplans · 8 Ad wording · 9 Inspections and open homes · 10 Editing, clone, leased and withdraw	you are creating or changing an ad
C. Money	11 Pricing, payments and upgrades · 12 Invoices, receipts and renewals	you need a price, a receipt or a renewal
D. Portals and leads	13 REA, Domain and syndication · 14 Enquiries, autoresponders, CRM and analytics	an ad isn't on a portal, or enquiries are missing

E. Applications	15 Verifii rental applications · 16 Owning the application process	you are leasing a property
F. AML/CTF	17 Overview · 18 Owners and vendors · 19 Purchasers	you are taking on a property or selling one
G. Tools and account	20 RealWorks, Pricefinder, NTD and other tools · 21 Account settings · 22 Live Support Chat	you need forms, data or your account details
H. Rules and fixes	23 Acceptable Use Policy · 24 Common problems and fixes	something went wrong, or you are not sure if something is allowed
I. Inspections and what's next	25 THE Inspection Manager (beta) · 26 Proposed features · 27 The Form Manager · 28 Reminders · 29 The CRM Calendar	you are doing an entry, exit or routine inspection, or want to know what's planned
Appendices	A Glossary · B Checklists · C Index of common problems · D Screenshot register	you need a quick reference

1.3 Symbols and labels

> 💡 **Tip**
> A shortcut or a good habit that saves time.

> ⚠️ **Warning**
> Something that can cost you money, break a listing or put you in breach of the rules. Read these carefully.

> ℹ️ **Note**
> Background that helps you understand why the system works the way it does.

> 🎧 **From the support desk**
> A real question managers often ask, with the answer the support team gives.

Screenshot labels

Every screenshot has one of three labels in its caption:

Label	What it means
Live UI · demo data	The real production screen (same code, layout, buttons and wording) filled with made-up demo data. The demo manager is "Sam Sample" of "Demo Apartments", and the addresses, people and emails are fictitious (example.com). No real customer data is shown.
Real capture	A public page captured as it appears on the live website. Any third-party listing content in the background has been blurred.
Illustrative	A mock-up built from the real page template to show a flow that can't be captured safely (for example, an applicant's verification page). Treat the exact layout as indicative.

ℹ️ Prices in screenshots and tables were correct when this manual was written (October 2026). They **change**, and REA prices vary by suburb. The price shown in the wizard at the moment you publish is the price you pay. Under the Terms, all estimates are indicative only (see 23.2).

1.4 Desktop and mobile

TheOnsiteManager is one website that adapts to your screen. Everything in this manual works in a desktop browser (Chrome, Edge, Safari or Firefox) and in your phone's browser. On a phone:

- the top menu folds into a ☰ menu button;
- Control Panel tabs wrap onto two lines, and listing rows stack vertically;
- the wizard step boxes show as a grid of two columns.

Each chapter shows the mobile view where it looks different. There is no separate app to install today. A dedicated manager app is only a proposal (Chapter 26).

💡 On a phone, add TheOnsiteManager to your home screen (Safari: Share → Add to Home Screen. Chrome: ⋮ → Add to Home screen). It then opens like an app.

1.5 Getting help

The fastest way to get help is the **Live Support Chat** button at the bottom right of every page once you are logged in (Chapter 22). Include your **Listing ID** (the 8-digit number on each listing) and a screenshot if you can.

1.6 What's new in this version

Version 1.8 (23 October 2026)

Change	Where
CRM Enquiries: the listing filter now lists your own listings (current first)	14.3
CRM Calendar: click an inspection to see its attendees, and print the list with the check-in QR code	29.3, 29.4
CRM: the VERIFII tab is now **Applications** and also shows 2Apply applications	14.2, 14.17
CLONE no longer copies the old listing's REA ad, so each copy becomes its own REA ad	10.4
New property type: Duplex / Semi-detached	6.1, 6.2
Listing brochures show your name, mobile, @theonsitemanager.com.au alias and the listing's photos	4, 20.7
Domain: don't change the address of a published listing	10.3, 13.9

What "Disclose Unit Number to Competitors" does on realestate.com.au	5.4
Leases and forms: old RealWorks steps updated to The Form Manager (import, historical realworks folder, tenants to CRM, forms filled from a lease)	15.9, 20.1, 27.10–27.13
Email alias corrected to **@theonsitemanager.com.au**	2, 20.1

Earlier versions added The Form Manager (27), Reminders (28), the CRM Calendar (29), the Performance Report for owners (14.16), Invoices and Receipts (12) and THE Inspection Manager (25).

CHAPTER 2

Getting started: joining, logging in and your password

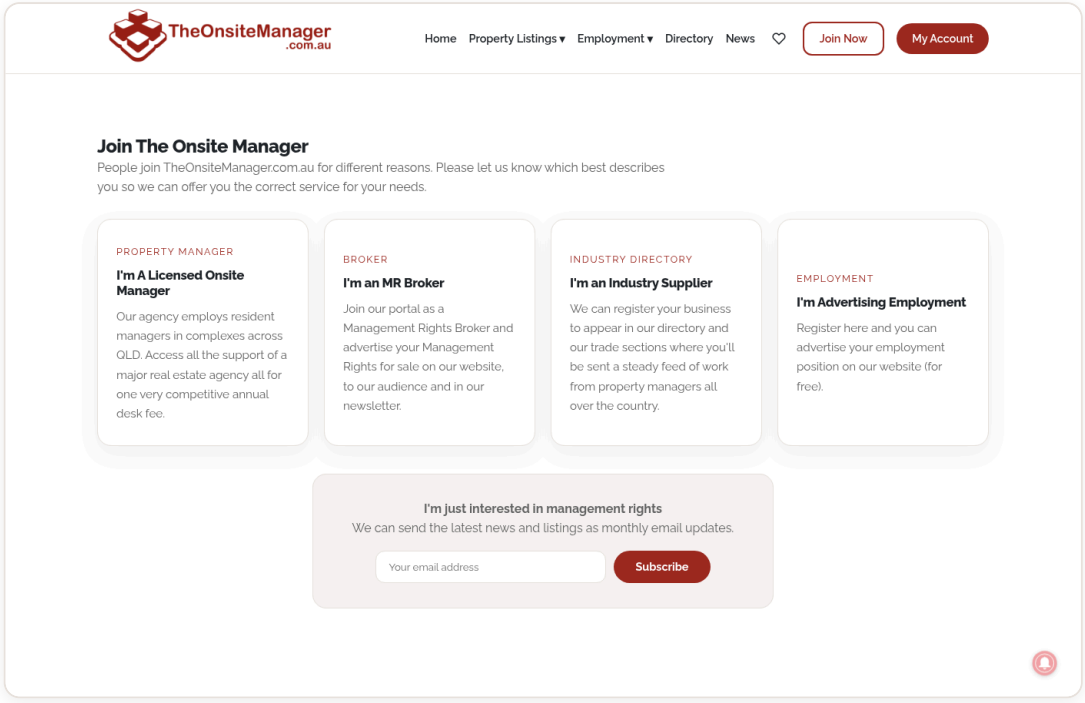
Create your account, sign in on desktop or phone, and sort out password problems.

In this chapter

- The account types and plans (LITE and FULL)
- How to sign in and out
- What to do if you forget your password
- Your @theonsitemanager.com.au alias email

2.1 Joining TheOnsiteManager

Choose **Join Now** at the top of any page. The Join page asks which of these best describes you:



REAL CAPTURE Figure 1. The Join page: choose "I'm A Licensed Onsite Manager" if you are a property manager.

Option	Who it is for
Property Manager (I'm A Licensed Onsite Manager)	Resident and onsite managers who work under TheOnsiteManager's agency licence. This manual is written for you.
Broker (I'm an MR Broker)	Management rights brokers advertising businesses for sale.
Industry Directory (I'm an Industry Supplier)	Trades and suppliers listed in the Directory.
Employment	Anyone advertising a job (free).

LITE and FULL plans

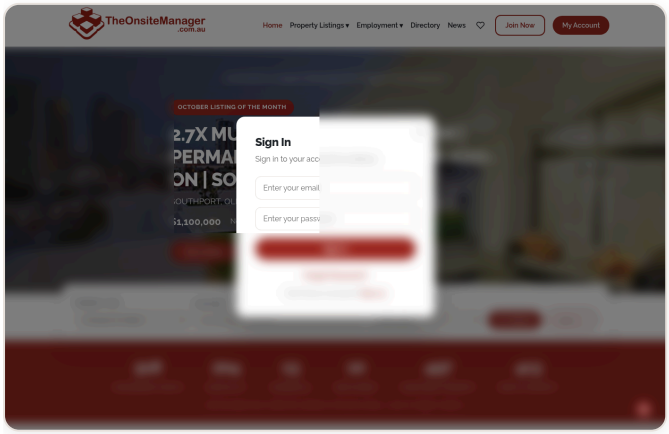
Property managers pay an annual desk fee called the **Agent Agreement**. There are two levels:

Plan	Includes	Annual fee (Oct 2026)
LITE	Rentals only. No RealWorks. Pricefinder is included.	$465 / year inc GST
FULL	Rentals, sales and RealWorks forms and leases. Pricefinder is included.	$1,034 / year inc GST

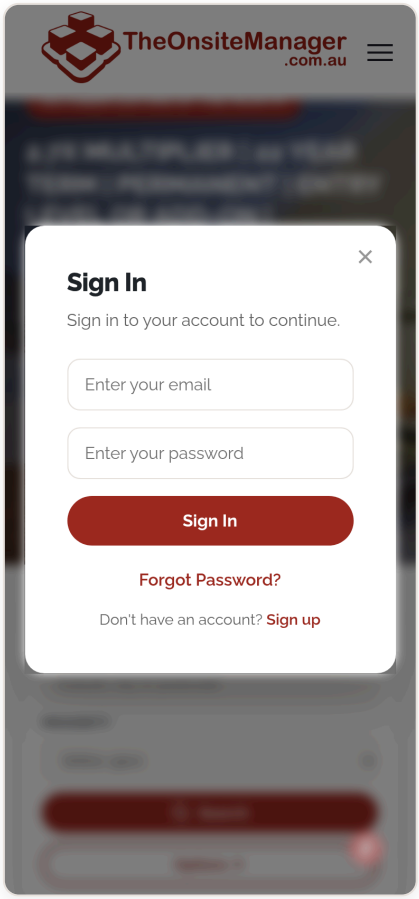
ARAMA members get 10% off. To move from LITE to FULL part-way through the year, use **Upgrade LITE → FULL** in the Control Panel. You pay the FULL fee less a credit for the unused part of your LITE plan. Chapter 12 covers renewals.

2.2 Signing in

1. Go to **theonsitemanager.com.au**.
2. Choose **My Account** (top right; on a phone, open the ☰ menu first).
3. Enter your **email** and **password**, then choose **Sign In**.
4. You land on the **Control Panel** (Chapter 3). The top button changes to **Control Panel** and a **Log Out** link appears.



REAL CAPTURE Figure 2. Sign In window on desktop. The live listing behind it has been blurred.



REAL CAPTURE Figure 3. The same Sign In window on a phone.

💡 Use the same email address for your login, your Gravatar photo (3.5) and payments. Receipts are matched to your login email (Chapter 12).

2.3 Forgotten password

The **Forgot Password?** link in the Sign In window does **not** send a reset email automatically. It tells you to contact the office. The quickest route is:

1. If you are signed in on another device (for example your phone), open **Live Support Chat** there and ask for a password reset.
2. If you can't sign in anywhere, use the contact details shown in the Forgot Password message or the website footer, and give your login email and the complex or business name.
3. When you can sign in again, change your password under **Edit My Account & Online Profile** → **New Password** / **Confirm New Password** → **Save Changes** (Chapter 21).

⚠️ Never send your password in chat or email, and never share your login with another person or agency. The Terms make you responsible for all activity on your account, and they forbid letting unauthorised third parties use the agency's services (23.2).

🎧 **From the support desk**

Login problems are the **6th most common** support topic (about 276 tickets). Most come from: using a different email to the one on the account; a password manager filling in an old password; or trying to use your TheOnsiteManager password on another system (VERIFII, RealWorks or Pricefinder each have their own sign-in. See Chapters 15 and 20).

2.4 Your alias email (@theonsitemanager.com.au)

Each manager has an **alias** address in the form `yourname@theonsitemanager.com.au`. It is shown as your agent email on listings and used to sign up to agency systems such as RealWorks. Mail sent to the alias is **forwarded** to your normal inbox.

- Enquiry and application alerts are sent to the alias, then forwarded to you.
- RealWorks password reset emails go to the alias, so they also land in your inbox (20.1).
- If forwarded mail goes missing, check your Junk folder and add the senders to your safe-senders list (14.14).

2.5 Signing out

Choose **Log Out** at the top right, or **Sign Out** at the bottom of the Control Panel. Always sign out on shared computers.

2.6 Checklist: first day on TheOnsiteManager

- [ ] Sign in and open the Control Panel.
- [ ] Check your details under Edit My Account & Online Profile (Chapter 21), including ABN, licence numbers and addresses.

- [ ] Add a head-shot photo on Gravatar using your login email (3.5).
- [ ] Check that a test email to your alias address reaches your inbox.
- [ ] Watch the Training Material videos in the Control Panel (3.3).
- [ ] Find the Live Support Chat button (Chapter 22).

CHAPTER 3

The Control Panel

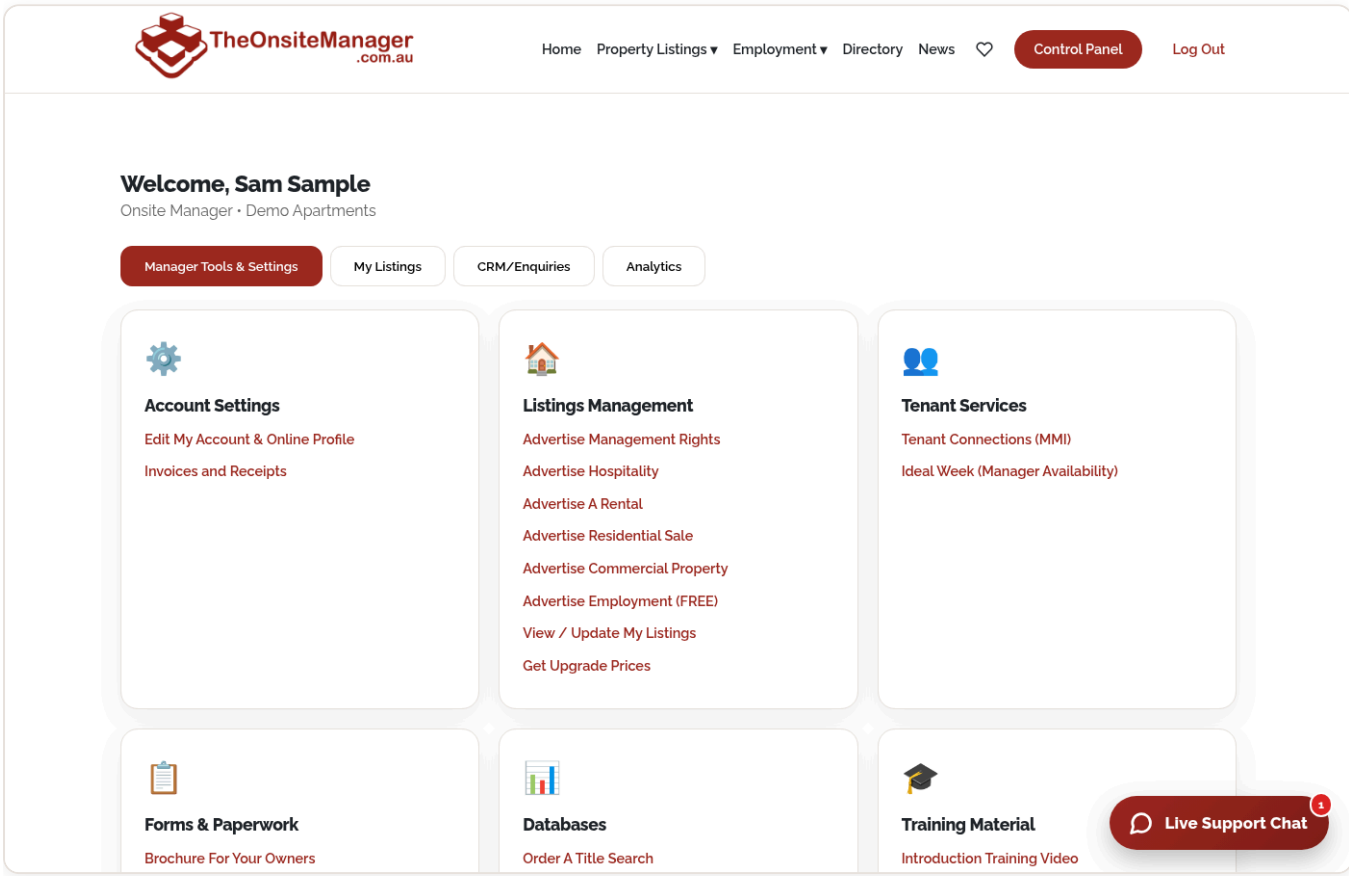
Your home base: every tool, listing, enquiry and report starts here.

In this chapter

- The four Control Panel tabs
- What each tool card does
- The renewal reminder and the portrait (Gravatar) prompt

3.1 Opening the Control Panel

When you sign in, you land on the Control Panel. You can return to it any time with the red **Control Panel** button at the top of every page. It greets you by name and shows your role and business name.



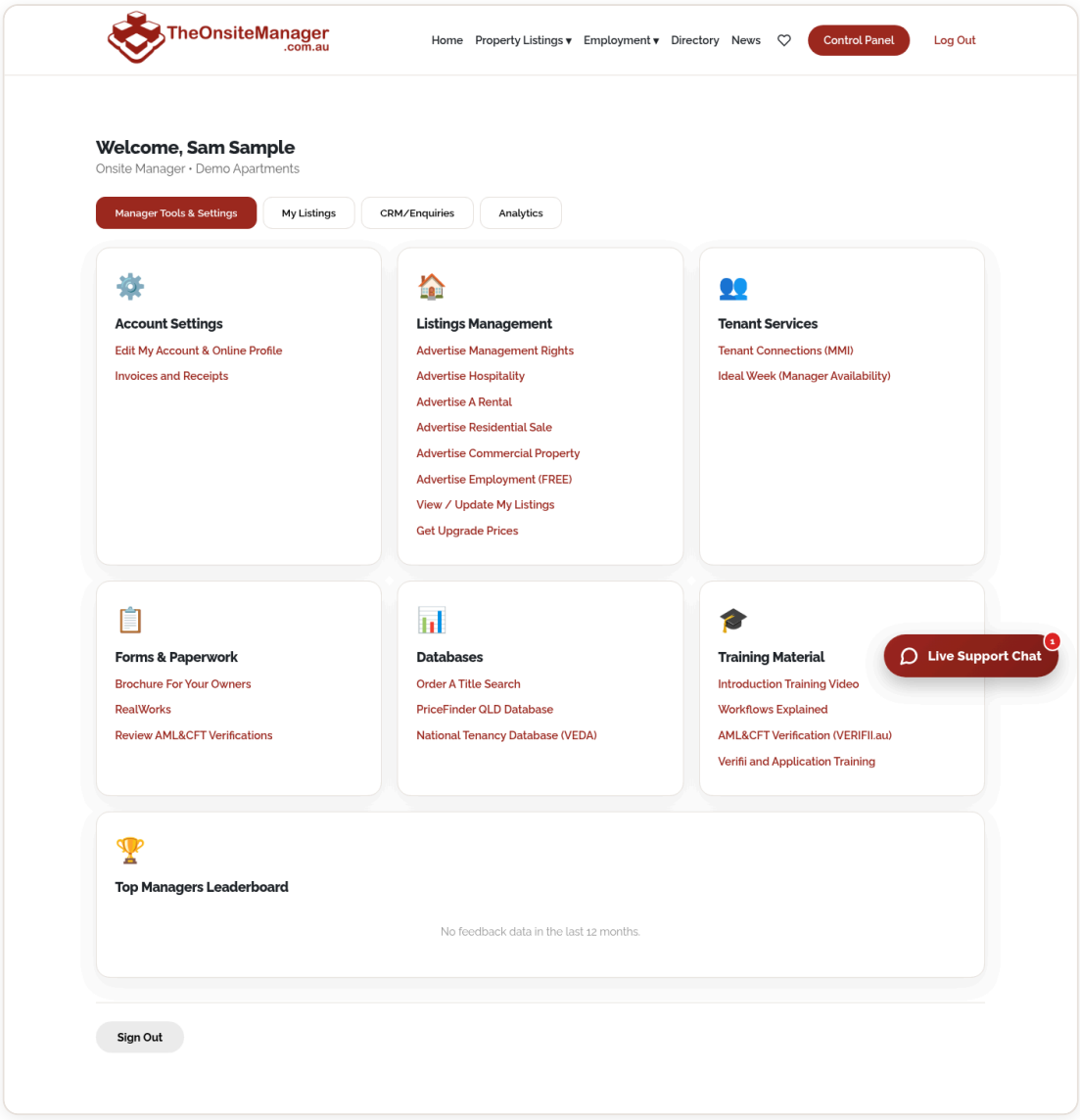
LIVE UI · DEMO DATA Figure 4. The Control Panel opens on the Manager Tools & Settings tab.

3.2 The four tabs

Tab	What you do there	Chapter
Manager Tools & Settings	Shortcuts to create ads, account settings, forms, databases and training.	3, 20, 21
My Listings	Every listing you have created, with status, portal status, verifications and applications, and action buttons.	4, 10, 15

CRM	Opens the CRM page: enquiries and contacts from every portal and open-home check-in, pipeline, follow-ups, calendar, reports, duplicates and match alerts.	14
Analytics	Views, enquiries, phone clicks, inspection bookings and applications for each listing, with a report you can email to owners, and the printable Performance Report (14.16).	14

3.3 Tool cards on the Manager Tools tab



LIVE UI · DEMO DATA Figure 5. All tool cards on the Manager Tools & Settings tab (desktop).

Account Settings

- **Edit My Account & Online Profile**: your login, contact, licence, agent and address details (Chapter 21).
- **Invoices and Receipts**: Xero invoices and card payment receipts (Chapter 12).
- **Upgrade From LITE to FULL instantly!**: shown on LITE accounts only (12.4).

Listings Management

- **Advertise Management Rights**, **Advertise Hospitality**, **Advertise A Rental**, **Advertise Residential Sale**, **Advertise Commercial Property**, **Advertise Employment (FREE)**: each opens the listing wizard for that

type (Chapters 5–6). You only see the types your account can advertise. For example, sales need the FULL plan.
- **View / Update My Listings**: jumps to the My Listings tab.
- **Get Upgrade Prices**: get REA prices for any address before you list (11.3).

Tenant Services

- **Tenant Connections (MMI)**: the utility connection service you can offer incoming tenants.
- **Ideal Week (Manager Availability)**: set the times you are free for inspections (20.6).

Forms & Paperwork

- **Brochure For Your Owners**: a PDF explaining the agency service, to give to owners.
- **RealWorks**: REIQ forms and agreements (FULL plan; 20.1). Prepare leases in The Form Manager (Chapter 27).
- **Review AML&CFT Verifications**: opens your VERIFII dashboard to see every owner, vendor, purchaser and applicant verification (Chapters 15–19).

Databases

- **Order A Title Search**: opens the Titles Queensland product search.
- **PriceFinder QLD Database** and **National Tenancy Database (VEDA)**: shared agency logins. Read the warning before you open them (20.2–20.3).

Training Material

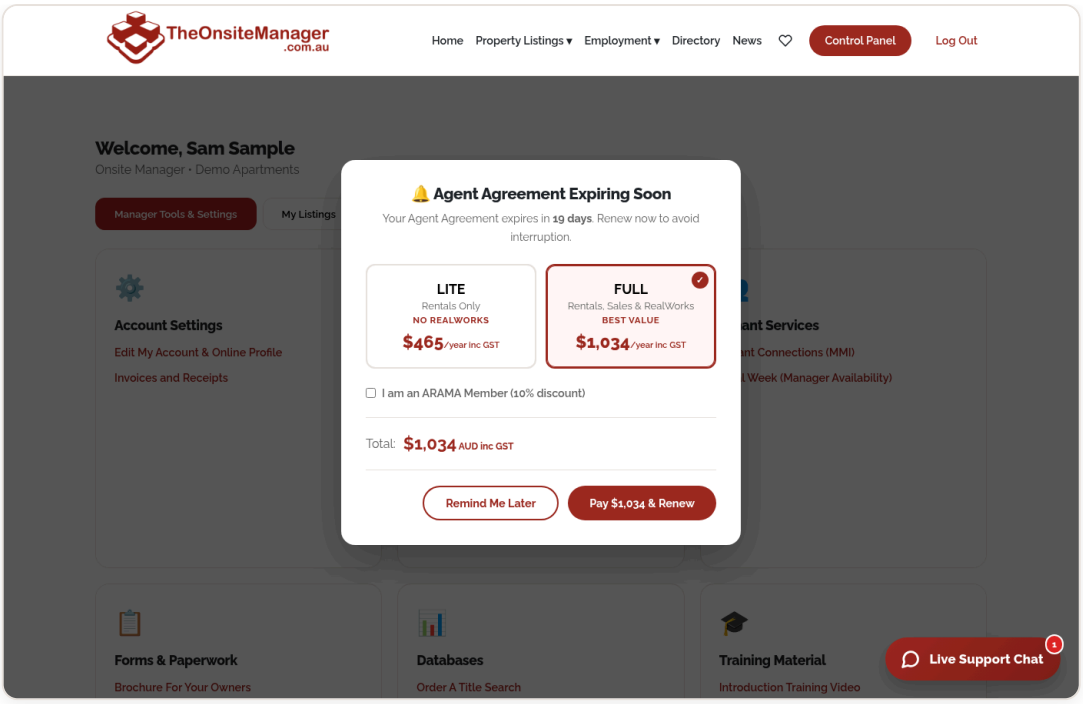
Short videos: **Introduction Training Video**, **Workflows Explained**, **AML&CFT Verification (VERIFII.au)** and **Verifii and Application Training**. Watch them alongside this manual.

Top Managers Leaderboard

This ranks managers by the feedback that enquirers give after contacting them (the follow-up feedback email, 14.11). It is based on the last 12 months. "No feedback data" means not enough feedback has come in yet.

3.4 The renewal reminder

When your Agent Agreement is **45 days or fewer** from expiry, a reminder appears each time you open the Control Panel. You can choose LITE or FULL, tick the ARAMA discount if it applies, and pay straight away. **Remind Me Later** closes it for now.



LIVE UI · DEMO DATA Figure 6. The renewal reminder appears when your agreement is 45 days or fewer from expiry.

> ⚠️ If your agreement has **expired**, the reminder can't be dismissed and most tools are hidden until you renew. Moving from FULL down to LITE removes RealWorks, and **your RealWorks forms are deleted**. Download anything you need first (12.4).

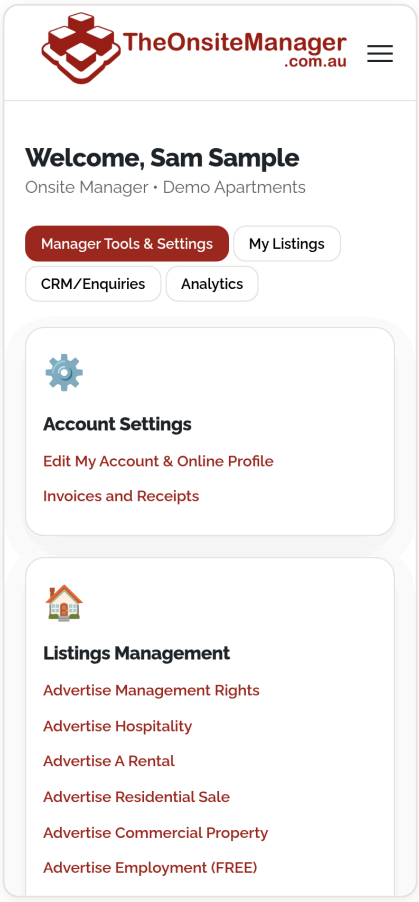
3.5 The portrait (Gravatar) prompt

Listings show a photo of the agent next to the Call and Apply buttons. The photo comes from **Gravatar** (gravatar.com), a free service that links a photo to an email address. If no photo is found for your agent email, the Control Panel asks *"Would you like to put a face to your name?"*

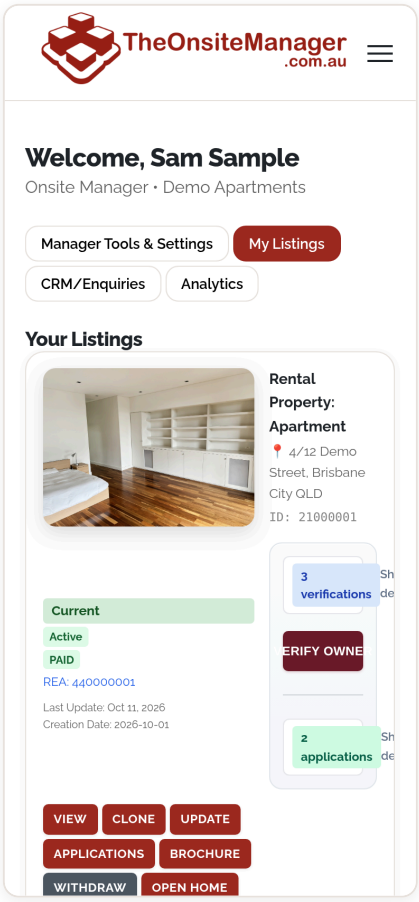
1. Choose **Set Up Portrait** → (or go to gravatar.com).
2. Create a free account using **exactly the same email** shown in the prompt (your agent email).
3. Upload a clear **head-and-shoulders photo**.
4. Allow up to an hour for it to appear on your listings.

> ⚠️ Portraits **must** be head shots. Do not upload logos. A business logo in the agent photo counts as advertising your own brand, which the REA rules prohibit (Chapter 23).

3.6 The Control Panel on a phone



LIVE UI · DEMO DATA Figure 7. Control Panel on a phone. The tabs wrap and cards stack.



LIVE UI · DEMO DATA Figure 8. My Listings on a phone. Each listing becomes a card.

Everything works the same way on a phone. Scroll down to see each card, and tap a tab to switch. Action buttons sit at the bottom of each listing card.

CHAPTER 4

My Listings: reading your listings at a glance

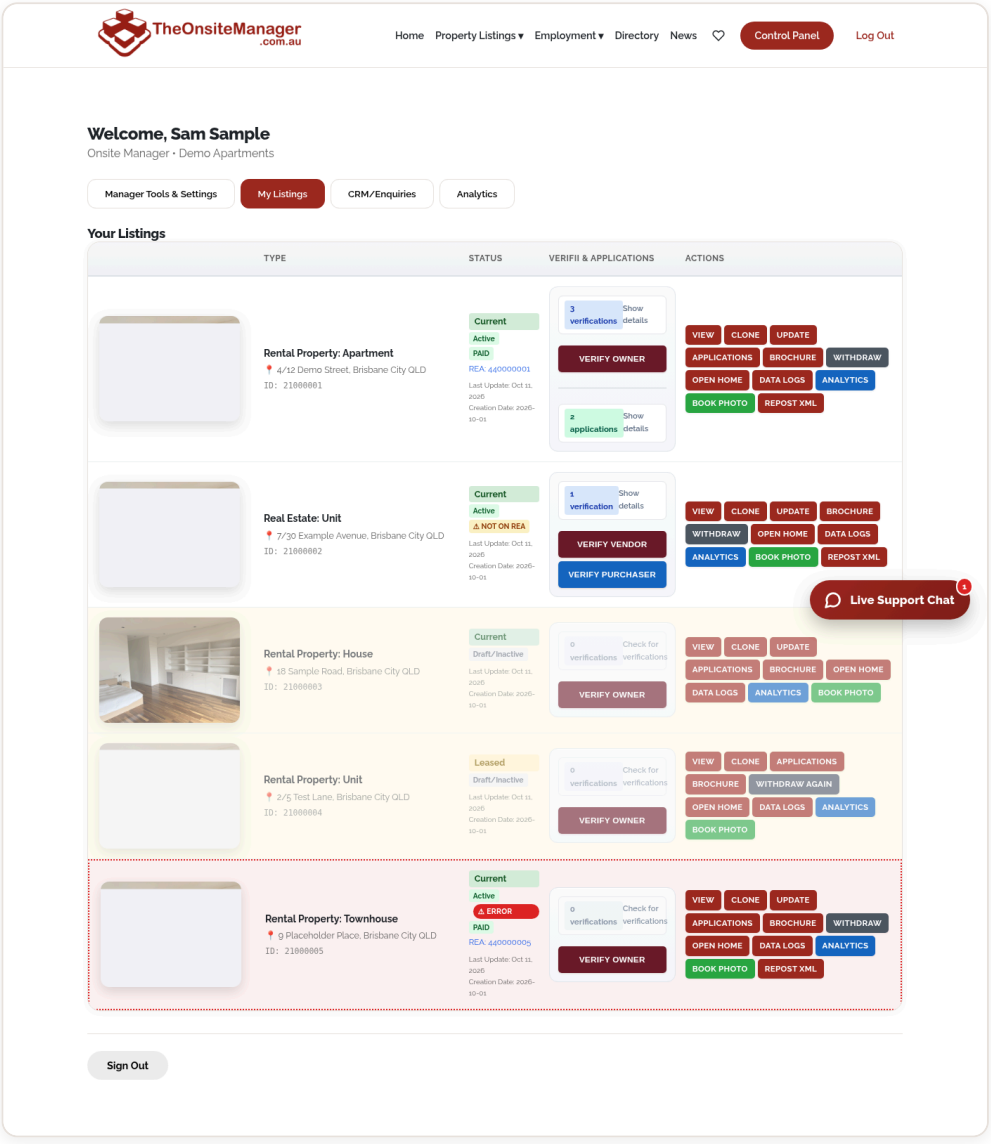
What every pill, date and button on the My Listings tab means.

In this chapter

- The four columns: Type, Status, VERIFII & Applications, Actions
- The status pills (Active, PAID, NOT ON REA, ERROR and more)
- Every action button and when it appears

4.1 Opening My Listings

In the Control Panel, choose the **My Listings** tab (or **View / Update My Listings** on the tools tab). Your listings are shown newest first.

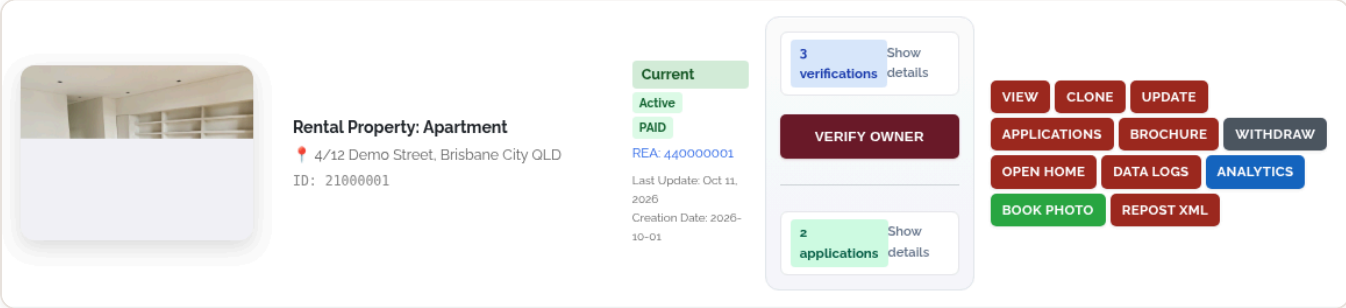


LIVE UI · DEMO DATA Figure 9. My Listings with five demo listings: live and paid, sale not on REA, draft, leased, and portal error.

4.2 The columns

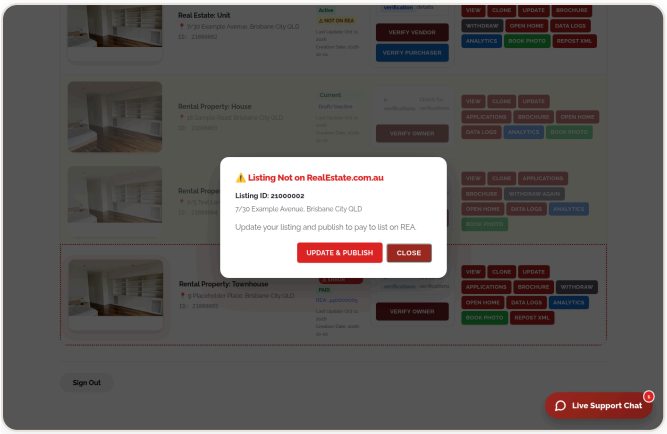
Column	Shows
Photo	The main (first) photo. If it's blank, the listing has no photos.
Type	Class and category (for example "Rental Property: Apartment"), the address and the 8-digit **Listing ID**. Always quote the ID when you contact support.
Status	Listing status, visibility, payment and portal pills, plus the **Last Update** and **Creation Date**.
VERIFII & Applications	AML verifications (owner, vendor or purchaser) and, for rentals, rental applications. Choose **Show details** to expand (15.6, 18.5).
Actions	Buttons to view, clone, update, withdraw and more (4.4).

4.3 Status pills

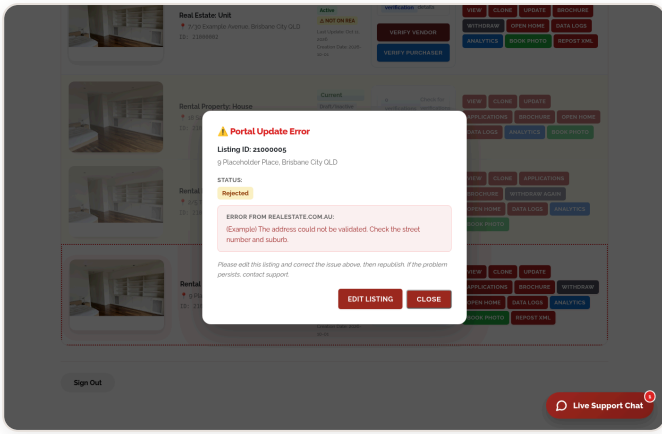


LIVE UI · DEMO DATA Figure 10. A live, paid rental. The pills show Current, Active and PAID, plus the REA listing number.

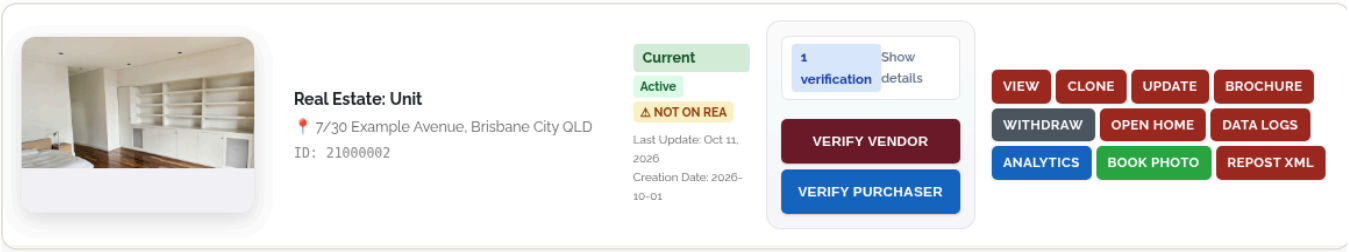
Pill	Meaning	What to do
Current / Leased / Sold / Under Offer / Off Market	The listing status you chose on the Review step.	Change it with UPDATE → Review (10.6).
Active	Visible on the website and sent to the portals.	–
Draft/Inactive	Saved but hidden. Not on any portal. Withdrawn listings also show this.	UPDATE → Publish to go live.
FEATURED	A featured management rights or hospitality listing (11.6).	–
PAID	REA advertising has been paid for this listing.	–
REA: 440… (blue link)	The listing's number on realestate.com.au. Select it to open the REA ad.	If the link opens an error page, see 13.7.
⚠ NOT ON REA	The listing is live on TheOnsiteManager but REA has not been paid, so it is not on realestate.com.au.	Select the pill, then **UPDATE & PUBLISH** and choose an REA level (13.3).
⚠ ERROR	A portal rejected the last update.	Select it to read the error (13.7).



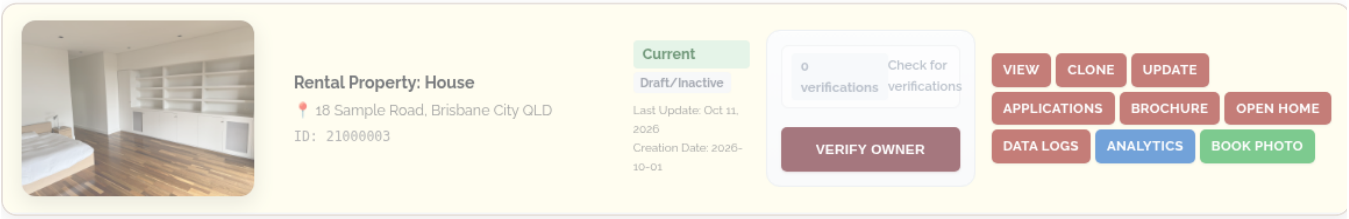
LIVE UI · DEMO DATA Figure 11. Selecting NOT ON REA explains what to do.



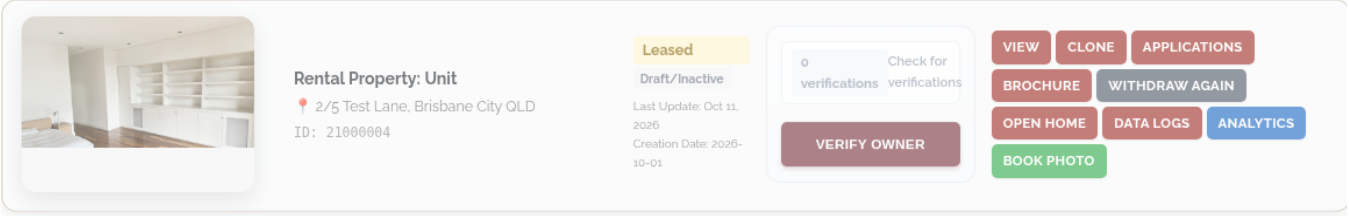
LIVE UI · DEMO DATA Figure 12. Selecting ERROR shows the portal's message (Portal Update Error).



LIVE UI · DEMO DATA Figure 13. A sale listing that is live on TheOnsiteManager but NOT ON REA. A vendor verification is in progress.

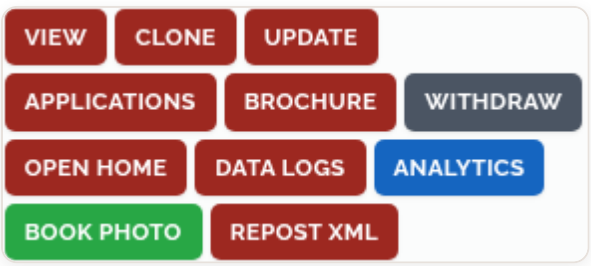


LIVE UI · DEMO DATA Figure 14. A draft listing is shaded and marked Draft/Inactive.



LIVE UI · DEMO DATA Figure 15. A leased, withdrawn listing. UPDATE is gone and WITHDRAW AGAIN is offered.

4.4 Action buttons



LIVE UI · DEMO DATA Figure 16. Action buttons on a live rental.

Button	What it does	Shown when
VIEW	Opens the public listing page on TheOnsiteManager.	Always
CLONE	Makes a new **draft copy** of the listing to re-advertise or fix an address (10.4).	Always
UPDATE	Opens the wizard on the Review step to edit the listing (Chapter 10).	Hidden once a listing that has been live is Leased, Sold or Withdrawn (10.1)
APPLICATIONS	Opens the rental application options for this property (Chapter 15).	Rentals
BROCHURE	A printable PDF brochure of the listing, with its photos, your name, your mobile and your @theonsitemanager.com.au email alias.	Always
WITHDRAW / **WITHDRAW AGAIN**	Hides the listing and tells every portal to take it down. **WITHDRAW AGAIN** re-sends the withdrawal if a portal still shows it (10.7).	WITHDRAW when live; WITHDRAW AGAIN when already withdrawn
OPEN HOME	Generates an A4 QR-code sign for open-home check-in (9.4).	Rentals and sales
THE INSPECTION MANAGER	Opens the Inspection hub for entry, exit and routine condition reports (Chapter 25). Beta.	Rental and real estate listings
DATA LOGS	Shows when the listing was sent to each portal, the result, and a change log (13.8).	Always
ANALYTICS	Opens analytics for this listing (14.15).	Always
PERFORMANCE REPORT	Opens the printable Performance Report for the owner: realestate.com.au statistics and enquiries from all portals (14.16).	Always
BOOK PHOTO	Books professional photography (7.6).	Always
REPOST XML	Re-sends the latest version of the listing to the portals. Use it only when support asks you to, or after an ERROR has been fixed.	Live listings
VERIFY OWNER / **VERIFY VENDOR** / **VERIFY PURCHASER**	Sends AML/CTF identity checks (Chapters 18–19).	Owner: rentals. Vendor and purchaser: sales, management rights and hospitality



Lighter, faded buttons on a draft or leased row still work. They are faded only to show that the listing is not live.

4.5 FAQ

Q. Why can't I see the UPDATE button on my listing?

The listing has been live and is now Leased, Sold or Withdrawn. Changing it would amount to "refreshing" an old ad, which REA bans. Use CLONE to create a new listing instead (10.4).

Q. My listing shows PAID but not on realestate.com.au.

REA usually takes a few hours to show a paid listing. If it still isn't there the next business day, open DATA LOGS and contact support with the Listing ID (13.7).

Q. What is the difference between Draft/Inactive and Withdrawn?

Both are hidden. A **draft** has never been sent to the portals, or was saved without publishing. A **withdrawn** listing was live and the portals have been told to remove it. Withdrawn listings show WITHDRAW AGAIN.

CHAPTER 5

Creating a listing: the listing wizard

One wizard creates every type of ad. Learn it once and use it for everything.

In this chapter

- The eight wizard steps, from Category to Review
- How to enter the address correctly. This matters, because it locks after payment.
- Publishing compared with saving as a draft
- What happens after you pay

5.1 Before you start

- [ ] You hold a **signed authority** from the owner to advertise (Chapter 23: no listing without authority).
- [ ] For a **sale**: you have the vendor's name and email for the AML/CTF check. A sale can't be published without it (Chapter 18).
- [ ] For a **rental**: you have the owner's name and email for the recommended owner verification.
- [ ] Your **photos** are landscape, at least 1000 px wide, with no text, logos or borders (Chapter 7).
- [ ] Your **ad wording** describes the property only: no phone numbers, emails, websites or business names (Chapter 8).
- [ ] You know the **full, correct address**, including the unit number.

5.2 Starting the wizard

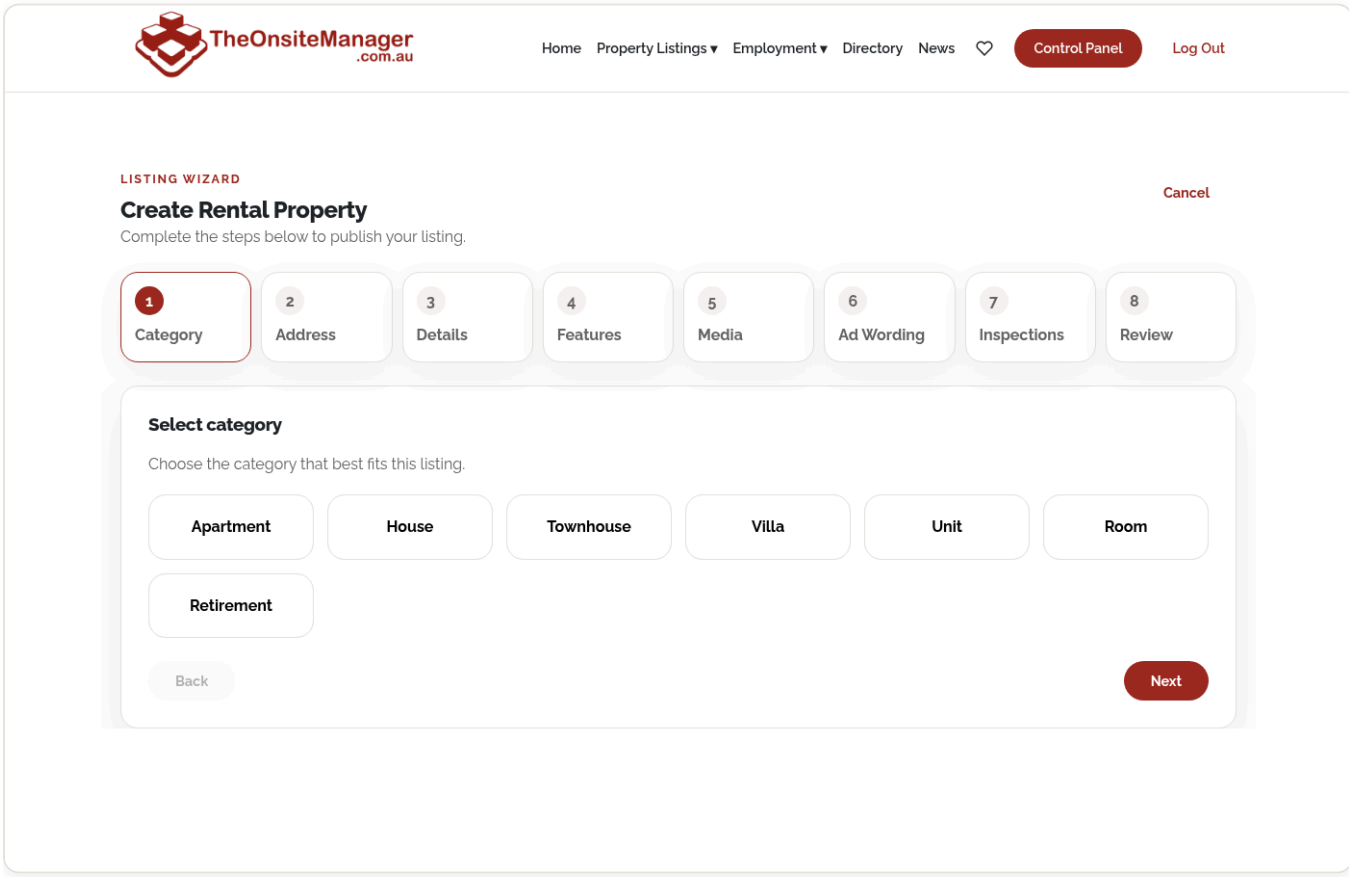
1. Open the **Control Panel** → **Manager Tools & Settings**.
2. Under **Listings Management**, choose the type: for example **Advertise A Rental**.
3. The **Listing Wizard** opens with a row of numbered step boxes across the top.

Completed steps turn red. You can select any earlier step to go back. You can only jump forward once every step in between is complete. **Cancel** (top right) leaves without saving.

Step	Name	Shown for
1	Category	All
2	Address	All
3	Details	All (fields differ by type)
4	Features	Rentals and residential sales only
5	Media	All
6	Ad Wording	All
7	Inspections	Rentals and residential sales only

8	Review	All: pricing, upgrades, status, AML/CTF and Publish

5.3 Step 1: Category



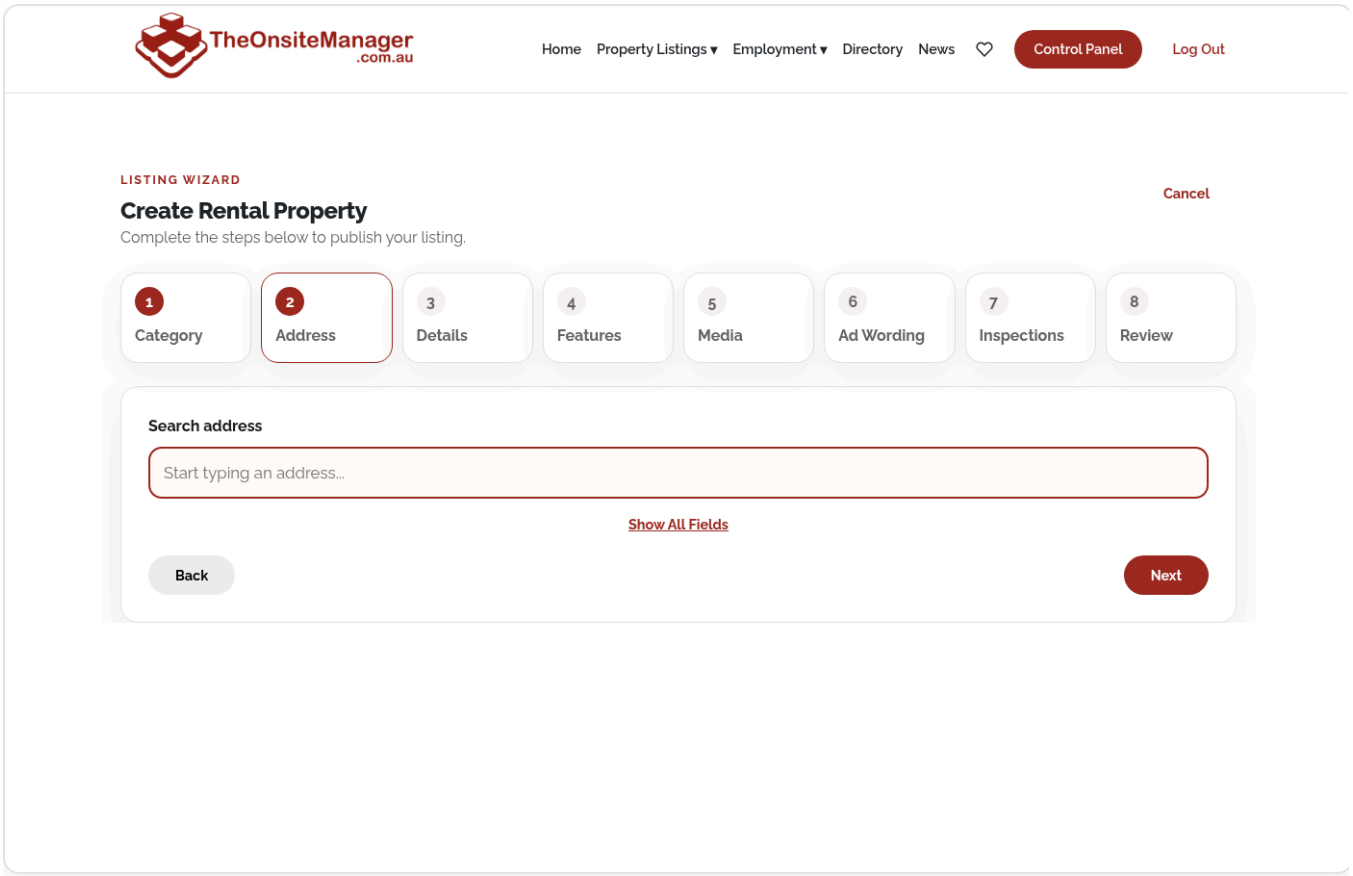
LIVE UI · DEMO DATA Figure 17. Step 1: pick the property category, then choose Next.

Choose the category that matches the property. For rentals the options are Apartment, House, Townhouse, Villa, Unit, Room and Retirement.

⚠️ Pick the **correct** category. REA rules ban the wrong category, for example a room in a share house listed as a whole rental, or a commercial property on the residential site. Unit-type categories also make the unit number compulsory in Step 2.

5.4 Step 2: Address

The address is the most important field in the whole listing. Once the listing has been **paid for**, the address **can't be changed** (10.3). Portals such as Domain also block address changes once they have received a listing.



LIVE UI · DEMO DATA Figure 18. Step 2: start typing the address and pick it from the suggestions.

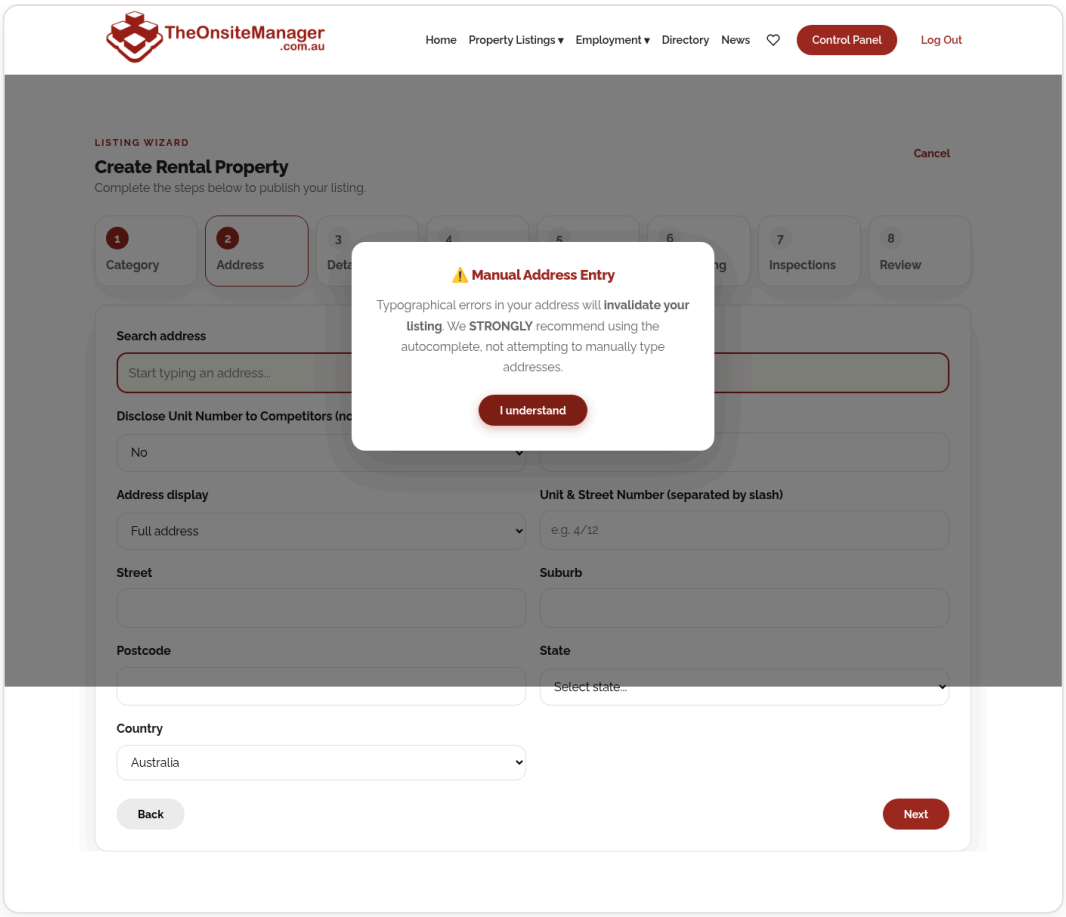
1. In **Search address**, start typing the street address. Suggestions appear (Australian addresses only).
2. **Pick the correct suggestion** from the list. This fills in the street, suburb, postcode and state.
3. Check the **Unit & Street Number** field. Units use a slash: `4/12` means unit 4 at number 12. For unit categories, the unit number is required.
4. Choose **Disclose Unit Number to Competitors**: *No* (recommended) or *Yes*. With *No*, the unit number is still sent to realestate.com.au, but REA **doesn't show it** on the ad (for example "125 Pappas Way" instead of "49/125 Pappas Way"). Choose *Yes* if you want buyers or tenants to see the unit number. You can change this after payment (10.3).
5. Choose **Address display**: *Full address* or *Suburb only*.
6. Choose **Next**.

Typing the address by hand

If the address isn't in the suggestions (for example a brand-new building), choose **Show All Fields**. A warning appears:

> Typographical errors in your address will **invalidate your listing**. We STRONGLY recommend using the autocomplete, not attempting to manually type addresses.

Choose **I understand**, fill in every field carefully, and check the spelling of the street and suburb against the council rates notice or title.

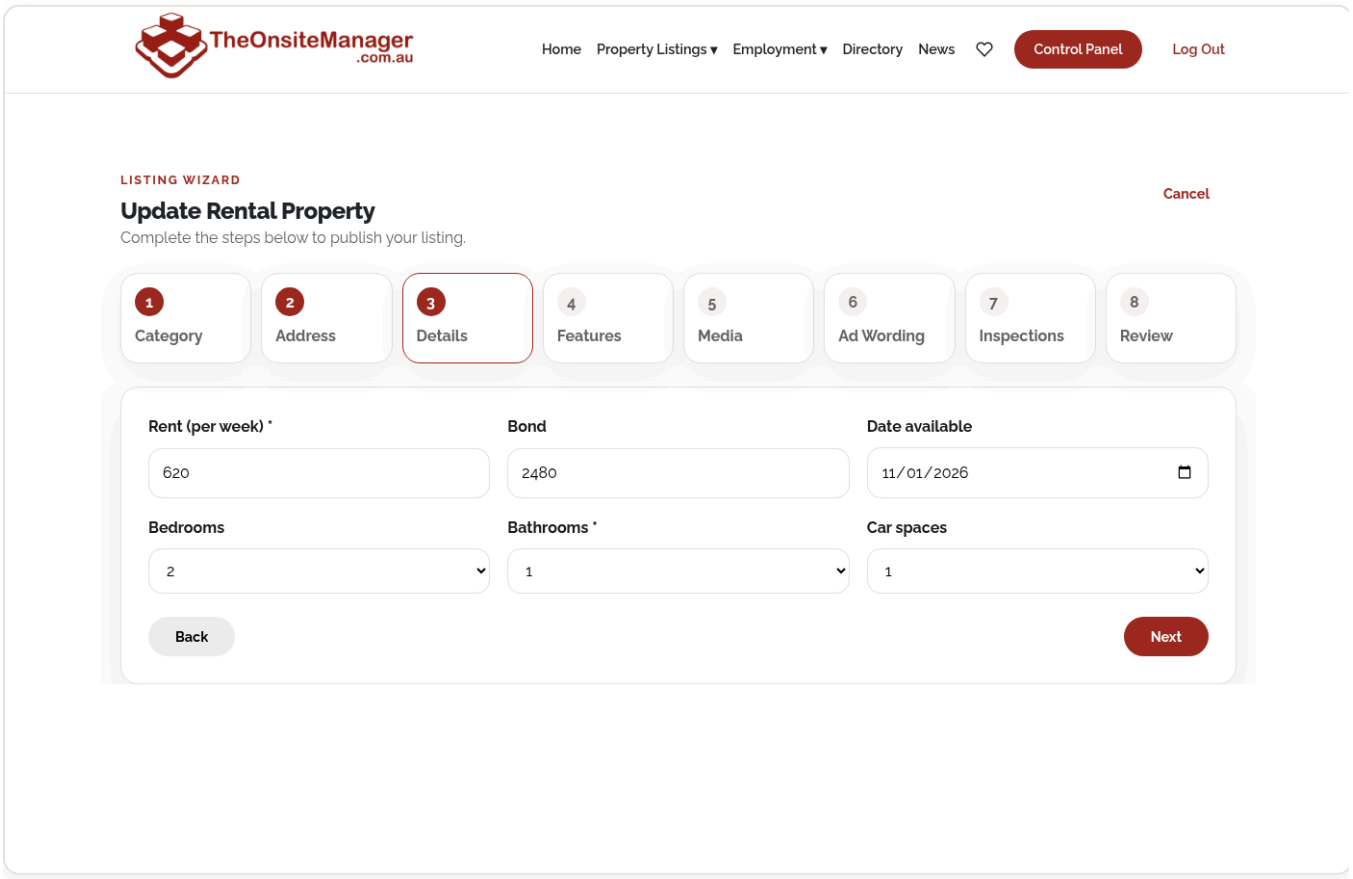


LIVE UI · DEMO DATA Figure 19. Show All Fields displays every address field for manual entry.

From the support desk

Wrong, locked or missing unit-number addresses are the **8th most common** support topic (about 200 tickets). Typical causes: the unit number was left out; the Listing ID was typed where the unit number belongs; the suburb was misspelt in manual entry. Check the address before you pay. Afterwards, the only fix is a new listing (10.4).

5.5 Step 3: Details

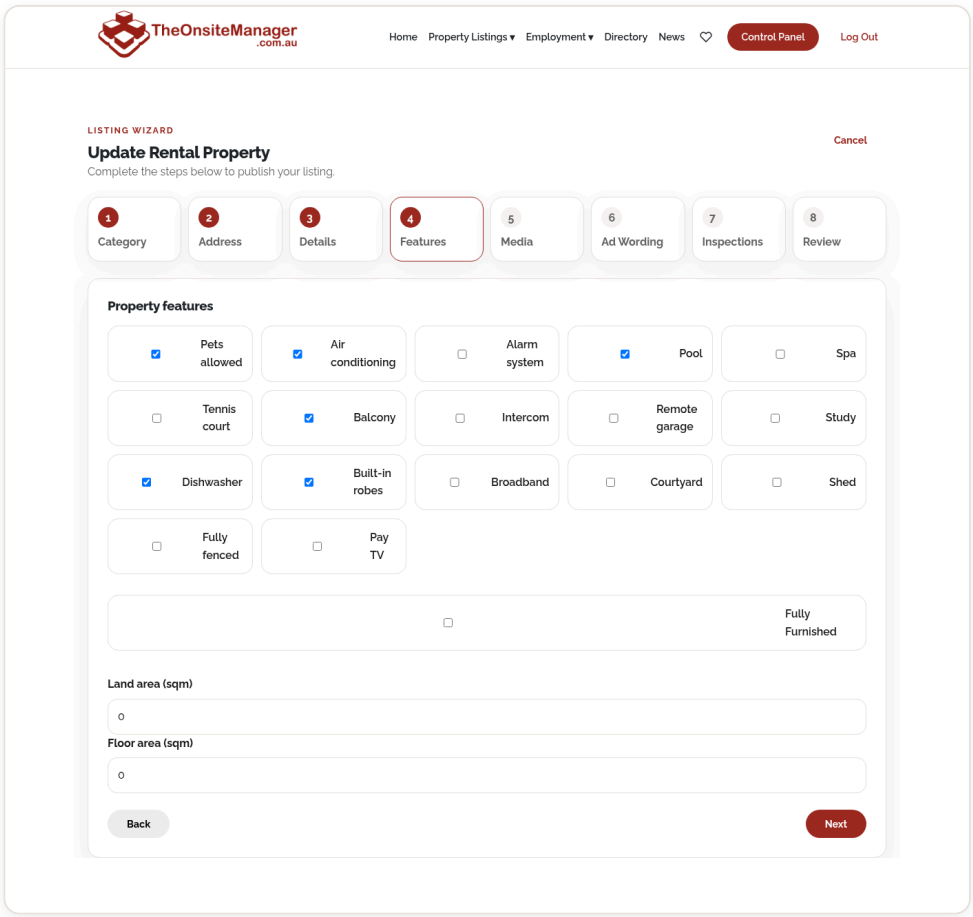


LIVE UI · DEMO DATA Figure 20. Step 3 for a rental: rent, bond, availability and rooms. Bathrooms is required.

The fields depend on the listing type (Chapter 6). For a rental:

- **Rent (per week)***: a number only, for example `620`. The **Bond** fills in automatically as 4 weeks' rent. You can change it.
- **Date available**, **Bedrooms**, **Bathrooms***, **Car spaces**.

5.6 Step 4: Features



LIVE UI · DEMO DATA Figure 21. Step 4: tick the features that apply.

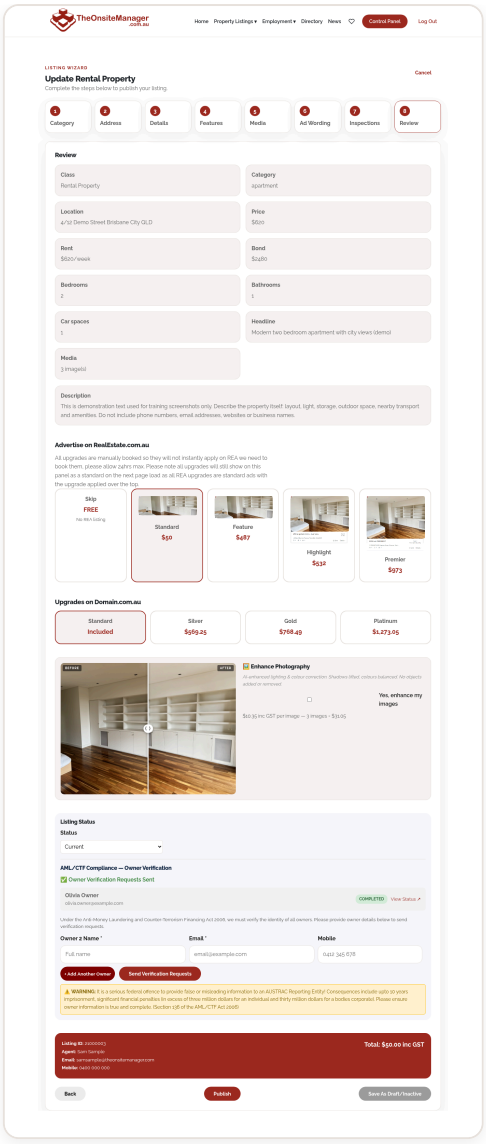
Tick every feature that applies (air conditioning, pool, dishwasher and so on). Features feed the portal search filters, so ticking them helps renters and buyers find your listing.

5.7 Steps 5–7: Media, Ad Wording and Inspections

These steps have their own chapters: **Media** in Chapter 7, **Ad Wording** in Chapter 8 and **Inspections** in Chapter 9.

5.8 Step 8: Review

The Review step brings everything together. Check it from top to bottom:



LIVE UI · DEMO DATA Figure 22. The Review step for a new rental: summary, REA levels, Domain levels, photo enhancement, status, AML/CTF and total.

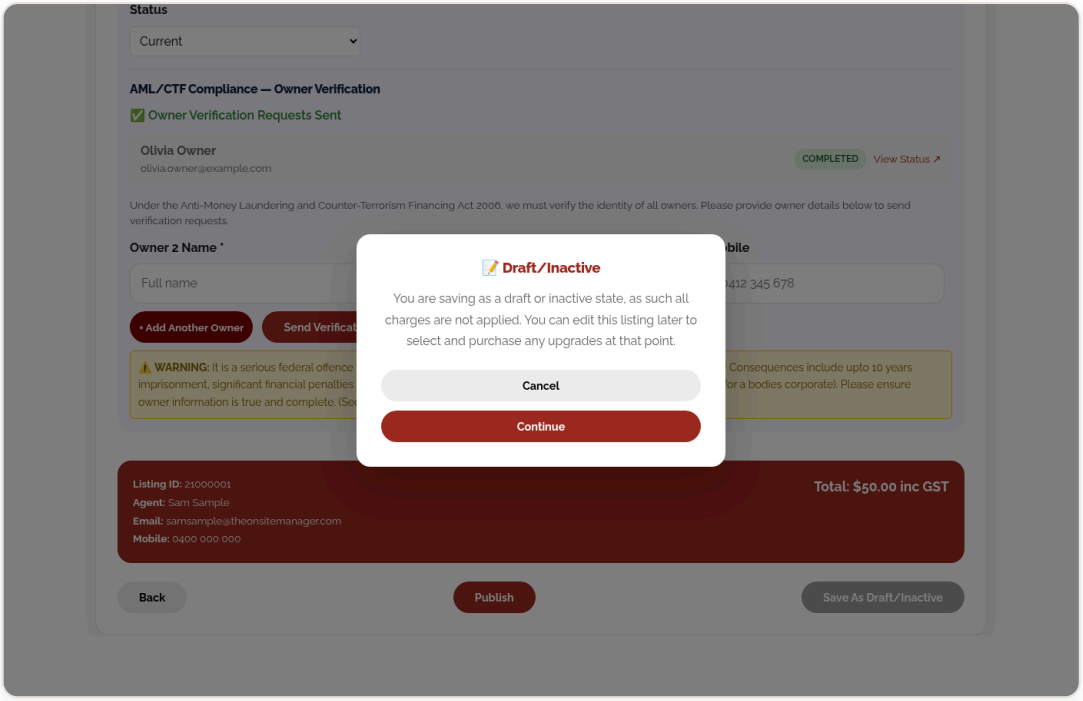
1. **Summary**: class, category, location, price, rooms, headline, number of images and description. Select any step box above to fix a mistake.
2. **Advertise on RealEstate.com.au**: choose *Skip* (free, not on REA) or *Standard*, *Feature*, *Highlight* or *Premier* (Chapter 11).
3. **Upgrades on Domain.com.au**: *Standard* is included. Silver, Gold and Platinum cost extra.
4. **Enhance Photography**: optional AI enhancement, charged per image (7.5).
5. **Listing Status**: usually *Current* for a new listing.
6. **AML/CTF Compliance**: owner details (rental) or vendor details (sale). See Chapter 18.
7. Check the red summary bar: Listing ID, agent details and the **Total inc GST**.
8. Choose **Publish**, or **Save As Draft/Inactive**.

Publish

- If the total is **$0**, the listing goes live straight away and is sent to the portals.

- If there is something to pay, you are taken to a secure card payment page. When payment succeeds, you return to the wizard and see *"Payment of $… successful! Generating portal XML feeds…"*. The listing is then sent to the portals.
- A rental with **no photos** asks you to confirm first, because listings without photos get far fewer enquiries.
- A **sale** without vendor AML details is blocked (18.3). A **rental** without owner details shows a warning with **Go Back** or **Continue Anyway**.

Save As Draft/Inactive

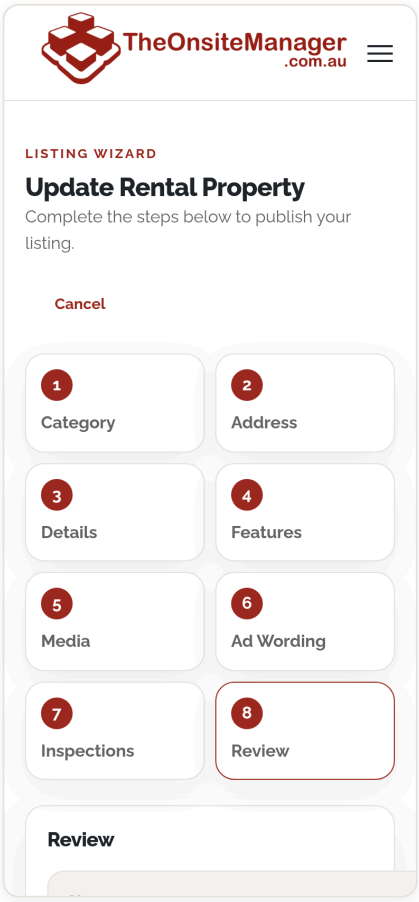


LIVE UI · DEMO DATA Figure 23. Saving as a draft applies no charges. You can buy upgrades later.

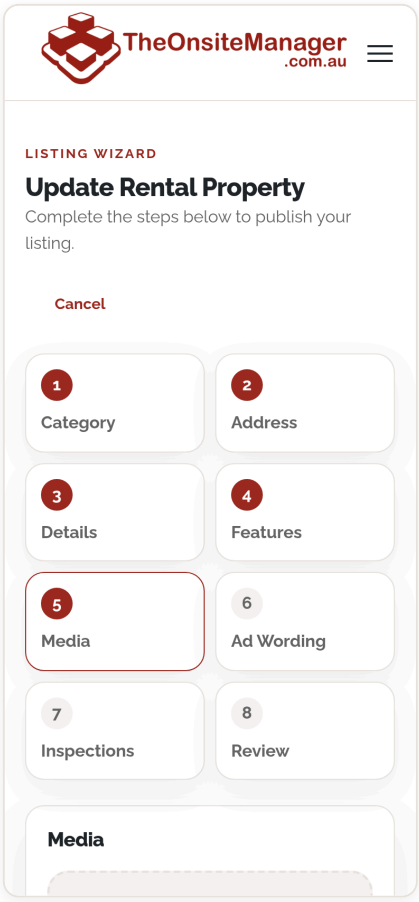
Drafts are hidden, cost nothing and are not sent to any portal. Come back later with **UPDATE** on My Listings.

> ⚠️ Do not close the browser tab during payment or while "Generating portal XML feeds…" is showing. If the page is interrupted, check My Listings. If the listing shows PAID but no REA number after a few hours, contact support with the Listing ID (13.7).

5.9 The wizard on a phone



LIVE UI · DEMO DATA Figure 24. Wizard step boxes on a phone (two-column grid).



LIVE UI · DEMO DATA Figure 25. The Media step on a phone. Choose Files opens your camera roll.

On a phone you can take photos with the camera and upload them straight from your camera roll. For best results, take photos in landscape (sideways). Portrait photos are flagged as low quality (7.2).

5.10 Checklist: publishing a new listing

- [ ] Category correct (Step 1)
- [ ] Address picked from suggestions, unit number with a slash, spelling checked (Step 2)
- [ ] Rent or price, rooms and availability correct (Step 3)
- [ ] Photos landscape, in the right order, main photo first (Step 5)
- [ ] Wording passes the checker: no contact details or business names (Step 6)
- [ ] Inspection times added (Step 7)
- [ ] REA level chosen, AML owner/vendor details entered, total checked (Step 8)
- [ ] After publishing: listing shows Active (and PAID, if you paid for REA) in My Listings

CHAPTER 6

Listing types

Rental, residential sale, commercial, management rights, hospitality, employment and UAE listings: what is different about each.

In this chapter

- The fields and rules for each listing type
- Which portals each type goes to
- Advertising a property in the United Arab Emirates

Type (Control Panel link)	Categories	Main portals	AML/CTF
Rental (Advertise A Rental)	Apartment, House, Townhouse, Villa, Unit, Room, Retirement	REA (paid), Domain (included), plus partner portals	Owner verification recommended (warning only)
Residential Sale (Advertise Residential Sale)	Apartment, House, Townhouse, Villa, Land, Unit, Retirement	REA (paid), Domain, partner portals	**Vendor verification required** before publishing
Commercial	Offices, Retail, Industrial/Warehouse, Land/Development, Commercial Farming, Hotel/Leisure, Medical/Consulting, Showrooms/Bulky Goods	RealCommercial.com.au	Vendor/purchaser as applicable
Management Rights	Permanent, Resort, Holiday, Retirement, Off the Plan, Corporate	TheOnsiteManager marketplace	Vendor and purchaser buttons on My Listings
Hospitality	Backpackers, Caravan Park, Hotel, Licenced Venue, Motel (freehold/leasehold), Retail and Food, Special Projects	TheOnsiteManager marketplace	Vendor and purchaser buttons on My Listings
Employment (FREE)	Caretaking, Management, Relief Manager, Dual Role	TheOnsiteManager jobs	–

6.1 Rentals

Rentals are the most common listing type. Follow Chapter 5 step by step. Points specific to rentals:

- **Rent** is weekly. The bond is filled in automatically as 4 weeks' rent.
- The **REA Standard** listing is a low fixed fee per listing ($50 inc GST in October 2026). Once paid, updates within the advertising window are free (11.2).
- The public listing on TheOnsiteManager shows an **Apply For This Rental** button that opens the VERIFII application (Chapter 15).
- The status options are Current, Leased and Off Market.

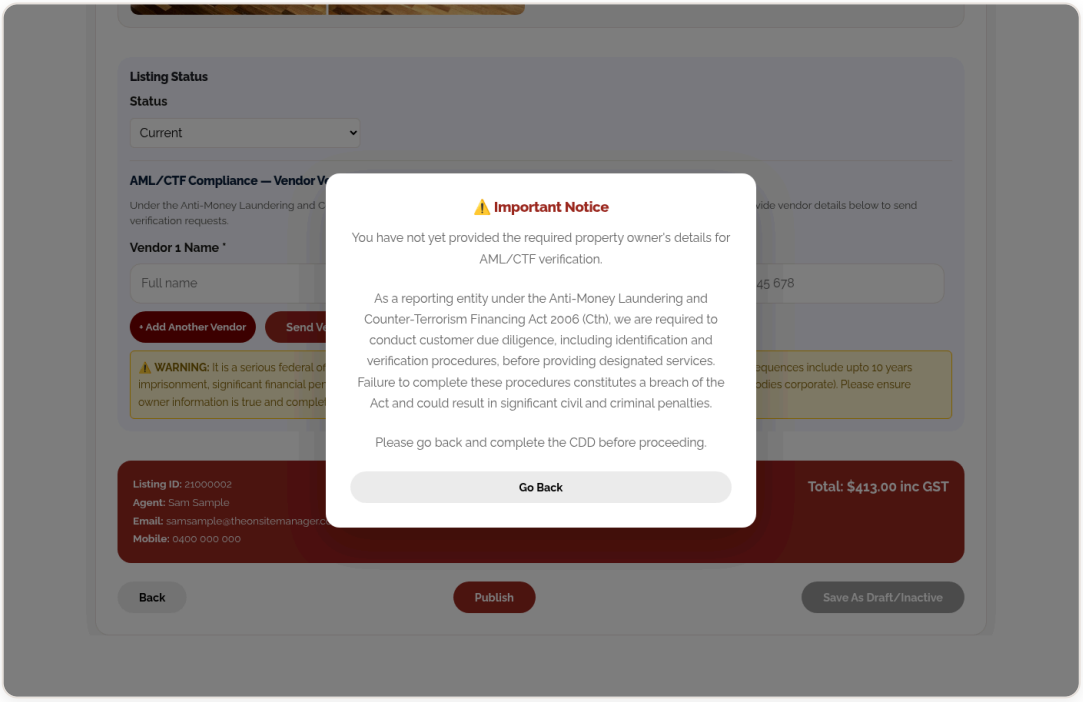
- Property types are Apartment, House, Townhouse, Villa, **Duplex / Semi-detached**, Unit, Room and Retirement. Duplex / Semi-detached is a unit-style type, so give the unit or side number (for example `1/24`) in the address.
- If your headline or wording contains the words **"leased"**, **"under application"** or **"pending"**, the status is locked to *Off Market* and a 🔒 message explains why. Remove those words if the property is still available.

> ⚠️ Do not advertise **short-term or holiday** stays, **rooms in a share house** as whole rentals, **Build-to-Rent** buildings, or **several properties in one listing** as residential rentals. These are banned by the REA Acceptable Use Policy (Chapter 23).

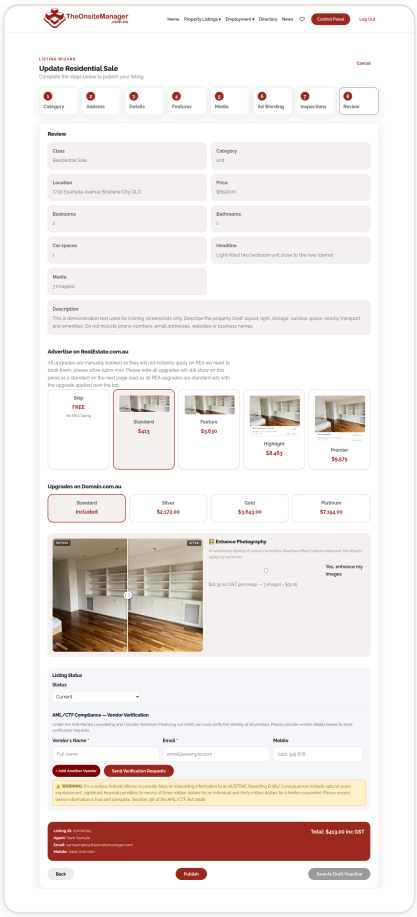
6.2 Residential sales

Residential sales need the **FULL** plan.

- **Sale price*** (a number), plus an optional **Display Price** (for example "Offers over $650,000" or "Contact agent"). Bedrooms, Bathrooms*, Car spaces and Land Area are also asked for.
- REA Standard for a sale is a higher fixed fee ($413 inc GST in October 2026). It covers a long advertising window (11.2).
- Property types are Apartment, House, Townhouse, Villa, **Duplex / Semi-detached**, Land, Unit and Retirement.
- The status options are Current, Under Offer, Under Contract, Sold and Off Market. If you mark a listing **Sold**, you must give a sale price above $50,000 and a sale date in the past.
- The Review step has an **AML/CTF Compliance: Vendor Verification** section. You **must** enter the vendor's details and send the request, or Publish is blocked:



LIVE UI · DEMO DATA Figure 26. Publishing a sale without vendor details is blocked with this notice.



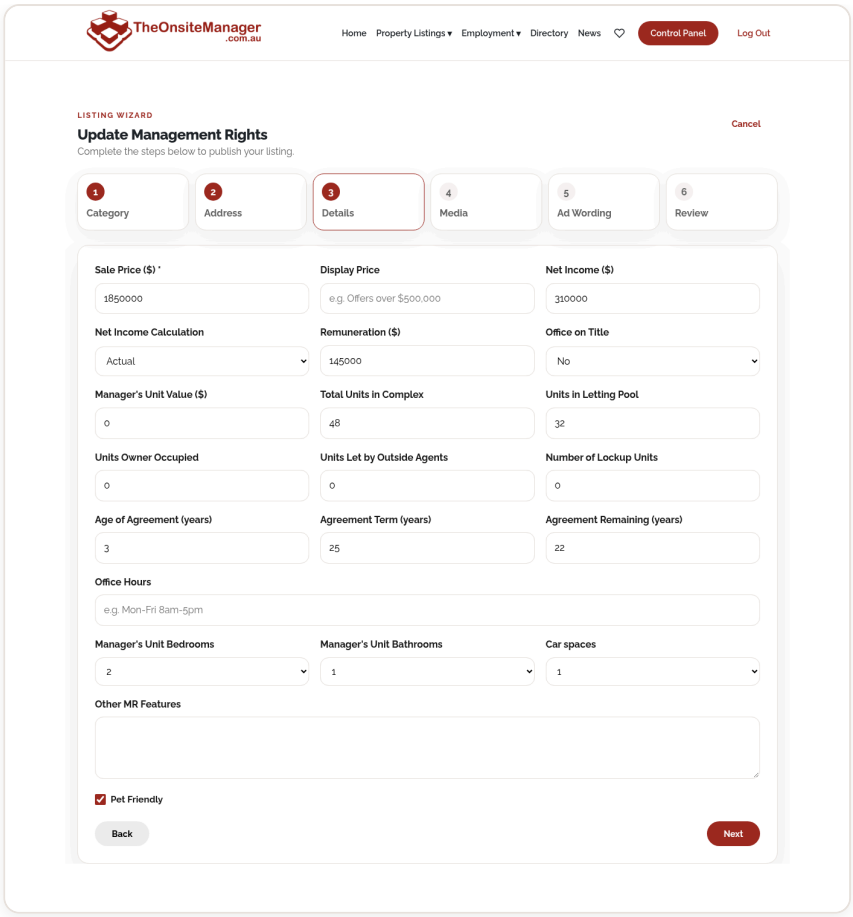
LIVE UI · DEMO DATA Figure 27. The Review step for a residential sale. The REA Standard price differs and the AML section asks for the vendor.

6.3 Commercial property

- Choose **For Sale or Lease**, then enter the Sale Price or Annual Rent, plus floor area, land area, car spaces, and auction date and time if there is an auction.
- Commercial listings go to **RealCommercial.com.au**. They carry a fixed fee of **$1,863 inc GST**, which includes a 90-day Enhanced Listing (October 2026).
- There is no Features or Inspections step.

6.4 Management rights

Management rights (MR) listings appear on TheOnsiteManager's management rights marketplace. The Details step asks for the business information buyers need:

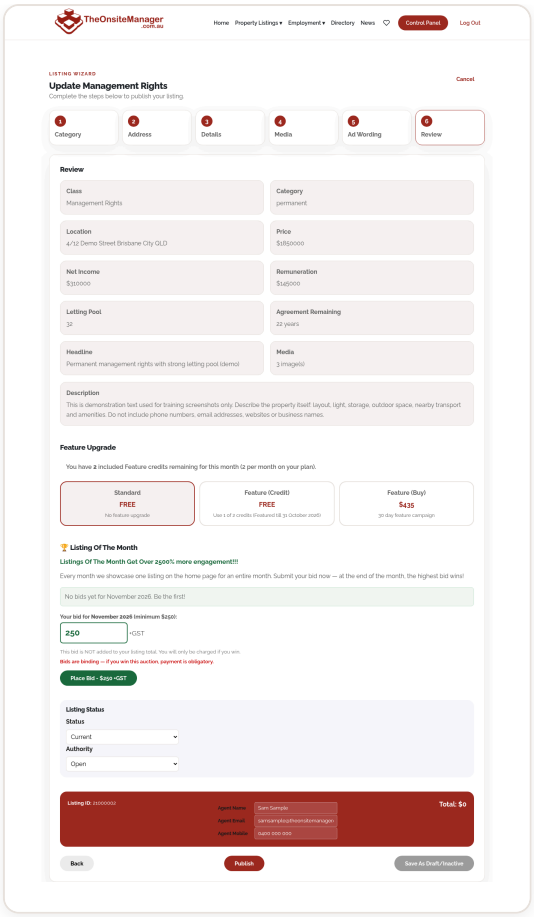


LIVE UI · DEMO DATA Figure 28. Details step for management rights: price, net income, remuneration, unit numbers and agreement terms.

- Sale Price, Display Price, **Net Income** and how it was calculated, **Remuneration**, Office on Title, Manager's Unit Value.
- Total Units, Units in Letting Pool, Owner Occupied, Let by Outside Agents, Lockup Units.
- Age of Agreement, Agreement Term, Agreement Remaining (years), Office Hours, manager's unit rooms and other features.
- On Review: **Status** (Current, Under Offer, Under Contract, Sold, Off Market) and **Authority** (Open or Exclusive).

Feature upgrades and Listing of the Month

MR and hospitality listings have their own upgrade options on the Review step:



LIVE UI · DEMO DATA Figure 29. Review step for management rights: feature credits, Listing Of The Month bid, status and authority.

Option	What you get
Standard (FREE)	No feature upgrade.
Feature (Credit)	Uses one of your monthly feature credits. Featured until the end of the month.
Feature (Buy)	A 30-day feature campaign at the price shown.
Pay Per Listing	For non-subscribers: listed until sold, unlimited free updates, and a free 90-day feature ($2,277 inc GST in October 2026).
Listing Of The Month	Place a bid to have your listing showcased on the home page for a whole month. The highest bid at month end wins. **Bids are binding** and GST is added.

6.5 Hospitality

Hospitality works like management rights. The Details step asks for Sale Price, **Net Profit** and its basis, **Tenure**, Included Real Estate, Total Rooms/Units, the owner's residence, and land and floor area. Feature upgrades and Listing of the Month work as in 6.4.

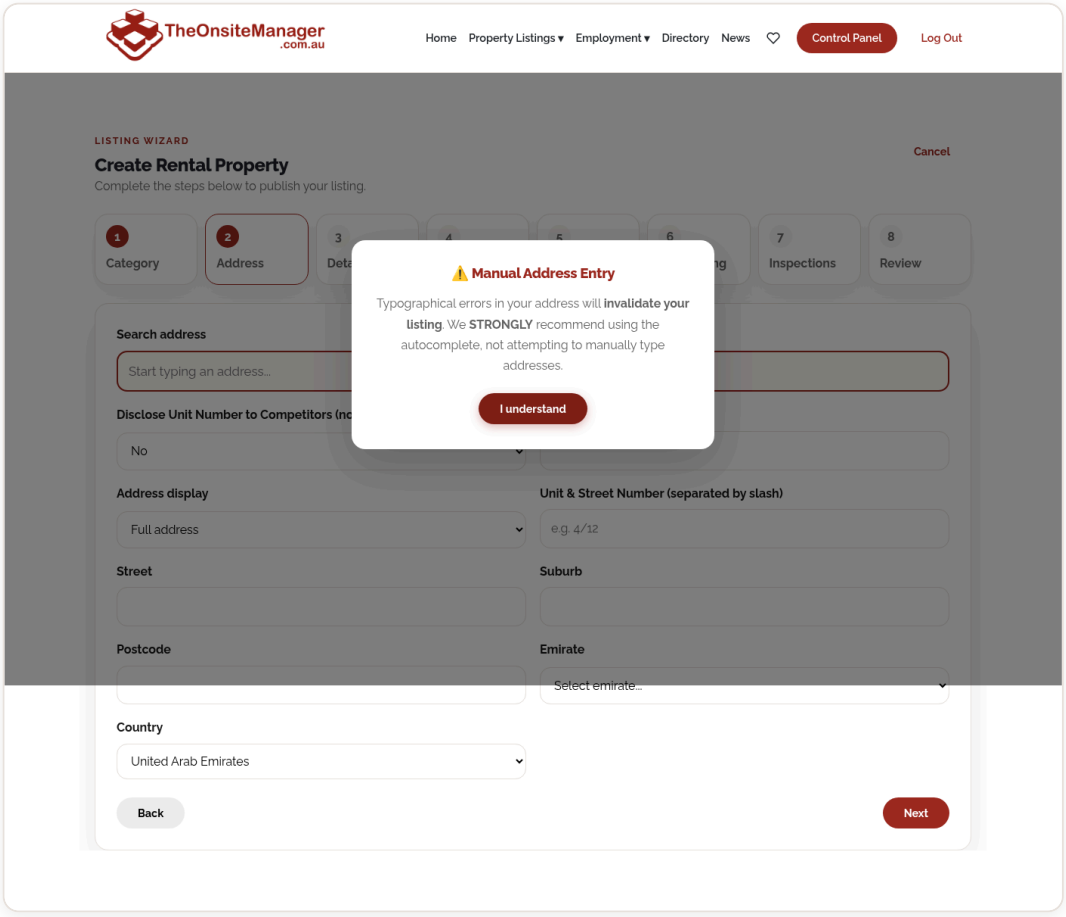
6.6 Employment (free)

Use **Advertise Employment (FREE)** to advertise a caretaking, management, relief manager or dual role position. Choose the state, describe the role and the applicant requirements, and publish. There is no charge.

6.7 Listings in the United Arab Emirates (UAE)

TheOnsiteManager can show listings for properties in the UAE **on TheOnsiteManager.com.au only**.

1. Start the wizard (for example **Advertise A Rental**) and pick the category.
2. On the Address step, choose **Show All Fields** (Australian address suggestions don't cover the UAE). Read the warning and choose **I understand**.
3. Set **Country** to *United Arab Emirates*. The State field changes to **Emirate**: Abu Dhabi, Dubai, Sharjah, Ajman, Umm Al Quwain, Ras Al Khaimah or Fujairah.
4. Complete the street, suburb or community, and postcode if one applies.
5. Continue through the wizard. On Review, AML/CTF verification is **optional** for UAE listings.



LIVE UI · DEMO DATA Figure 30. Choosing United Arab Emirates switches State to an Emirate list. The manual-entry warning is shown.

ℹ️ UAE listings are **published on TheOnsiteManager only**. They are not sent to REA, Domain or any other Australian portal, so there is no REA fee.

CHAPTER 7

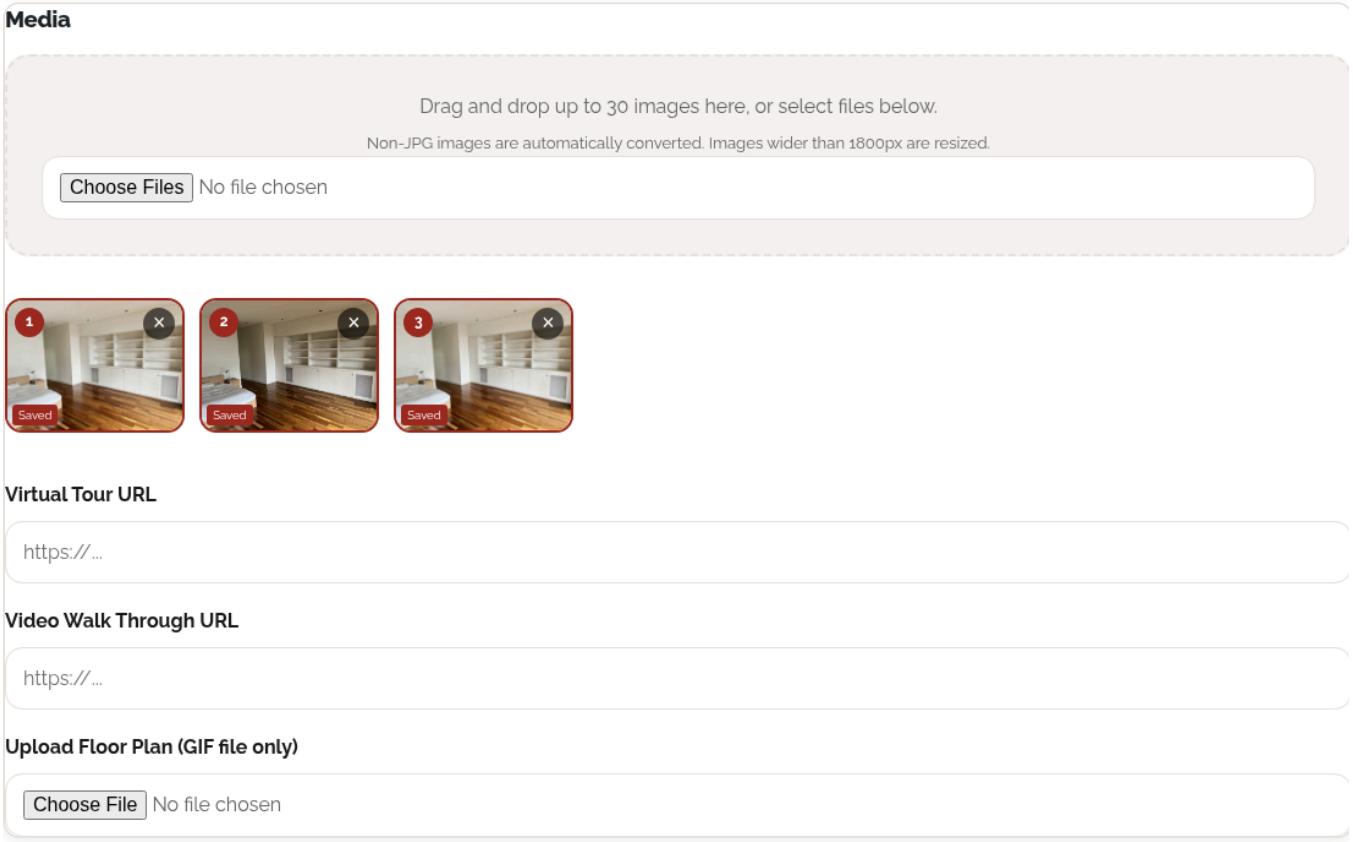
Photos, photo order, floorplans, video and photography

Great photos win enquiries. Here is how to upload, order and improve them.

In this chapter

- Uploading up to 30 photos and putting them in the right order
- Why a photo is flagged as "low quality"
- Floorplans (GIF), virtual tours and video
- Photo enhancement and booking a photographer

7.1 The Media step



LIVE UI · DEMO DATA Figure 31. The Media step: drop zone, numbered thumbnails, virtual tour and video links, and floor plan upload.

1. In the wizard, go to **Media** (Step 5).
2. Drag photos onto the grey drop zone, or choose **Choose Files**. You can add up to **30 images**.
3. Wait while each image is processed. Non-JPG images (for example PNG or HEIC from an iPhone) are converted automatically, and images wider than 1800 px are resized.

4. Each photo appears as a numbered thumbnail. **Number 1 is the main photo** used on the portals and in My Listings.
5. Choose **Next**. New photos are saved as you move through the wizard.

7.2 Low-quality warning

A photo is flagged ⚠️ and a **Low Quality Images Detected** window appears if it is:

- **portrait** (taller than it is wide), or
- **smaller than 1000 px wide**.

The window recommends a professional photographer, or at least professional enhancement. You can choose **Continue with these poor quality images as is**, but portals display portrait and small images poorly.

> 💡 Turn your phone sideways (landscape), switch on the grid, keep it level, turn on every light, and open the blinds. Take the main photo from a corner, so the room looks bigger.

7.3 Changing the photo order

1. On the Media step, **drag** a thumbnail to a new position. The numbers update.
2. Put your best photo (usually the living area or the outside of the building) in position **1**.
3. Continue to **Review** and choose **Publish** so the portals receive the new order.

> ⚠️ **New photos can't be mixed with saved photos until they are saved**
> Thumbnails marked **Saved** are already stored. Newly added photos can't be dragged in among the saved ones until they are saved too. **Save first, then reorder:** add the new photos, go through to Review and Publish (or Save As Draft), then choose UPDATE, go back to Media and drag everything into order.

> 🎧 **From the support desk**
> Photos, photo order and floorplans account for about **147 tickets** (9th). The common issues are "the order didn't change on REA" (you must Publish after reordering, and REA can take a few hours to refresh) and "new photos won't move" (save first, then reorder).

7.4 Deleting photos

Choose the **×** on a thumbnail to remove it, then Publish to update the portals.

7.5 Floorplans, virtual tours and video

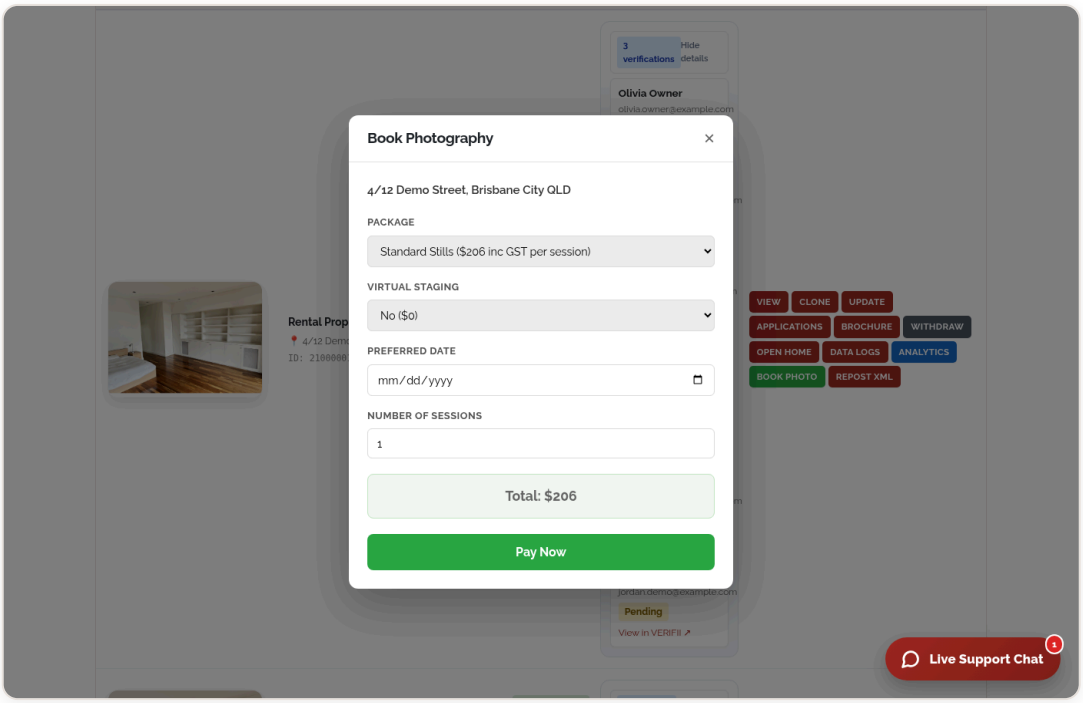
- **Upload Floor Plan (GIF file only)**: the floorplan must be a **.gif** file. Other formats are rejected with "Floor plan must be a GIF file." Most graphics apps and free online converters can save a PDF or JPG floorplan as GIF.
- **Virtual Tour URL**: paste a link to a 3D or virtual tour.
- **Video Walk Through URL**: paste a YouTube (or similar) link.

⚠️ Floorplans, photos and videos must not contain agency logos, phone numbers, websites or watermarks (other than a small transparent one). See Chapter 23.

Photo enhancement

The Review step offers **Enhance Photography**: AI lighting and colour correction (shadows lifted, colours balanced, no objects added or removed). A before/after slider shows the effect. The price is per image ($10.35 inc GST per image in October 2026).

7.6 Booking professional photography



LIVE UI · DEMO DATA Figure 32. BOOK PHOTO on My Listings: choose a package and preferred time.

1. On My Listings, choose **BOOK PHOTO** on the listing.
2. Choose a package and any virtual staging, plus a preferred date and time.
3. Review the total and pay.

Package (October 2026, inc GST)	Price
Standard Stills	$206
Virtual Tour + Floor Plan + 8 stills	$310
Virtual staging, 3 rooms	+$156
Virtual staging, 5 rooms	+$259

7.7 FAQ

Q. I reordered my photos but REA still shows the old main photo.

Did you Publish after reordering? If yes, allow a few hours, because REA caches images. If it still hasn't changed the next day, contact support with the Listing ID.

Q. My cloned listing has no photos.

CLONE copies photos when the original has them. If the original had none, you'll see an alert that no photos were copied. Upload them on the Media step.

Q. Can I use the photos from the previous agent?

Only with the copyright owner's permission. Using someone else's photos without permission breaches copyright and the Terms (23.2).

CHAPTER 8

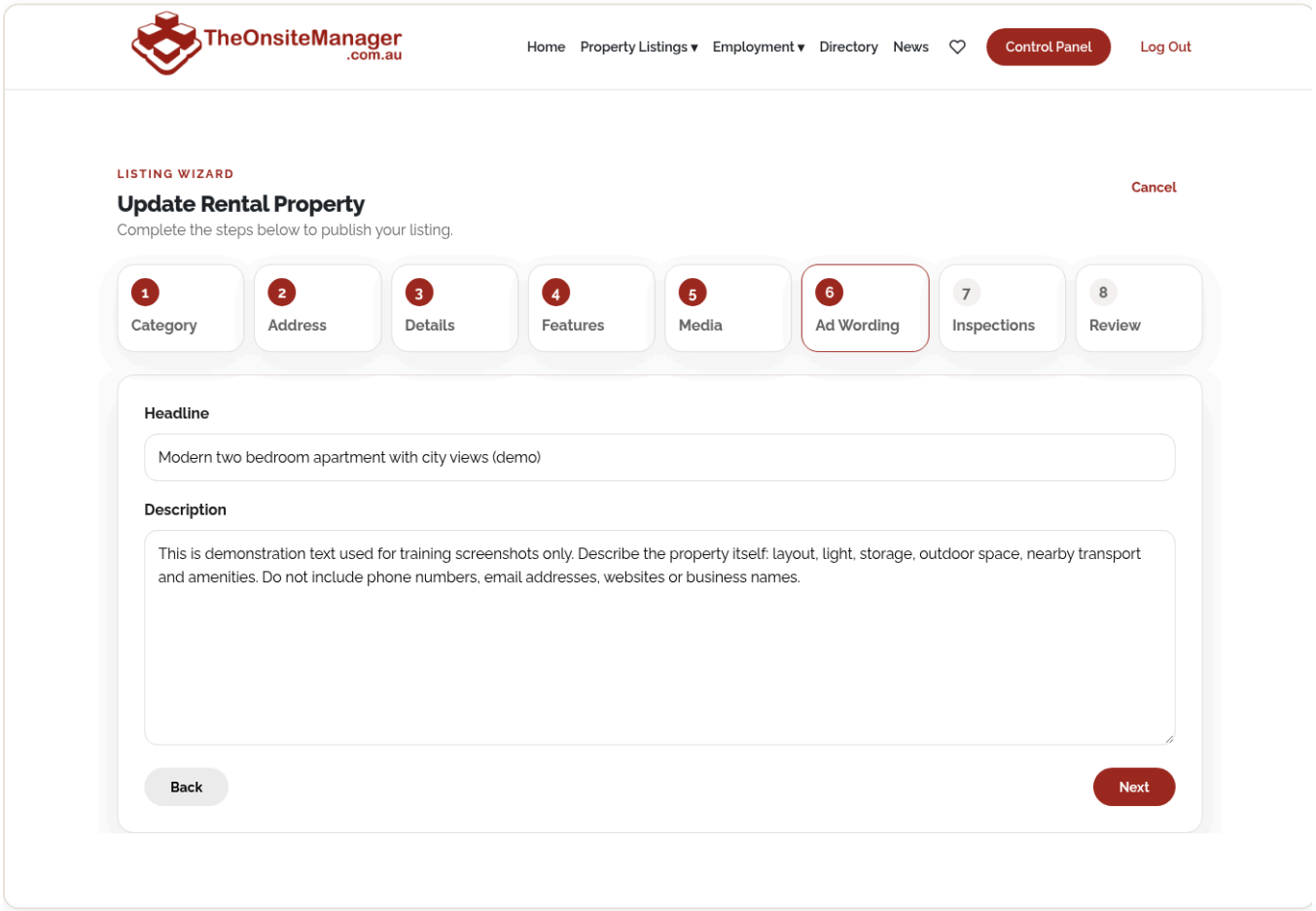
Ad wording and the wording checker

Write ads that sell the property and stay within the portal rules.

In this chapter

- Writing the headline and description
- What the automatic wording checker blocks, and why
- Words that lock a rental's status

8.1 The Ad Wording step



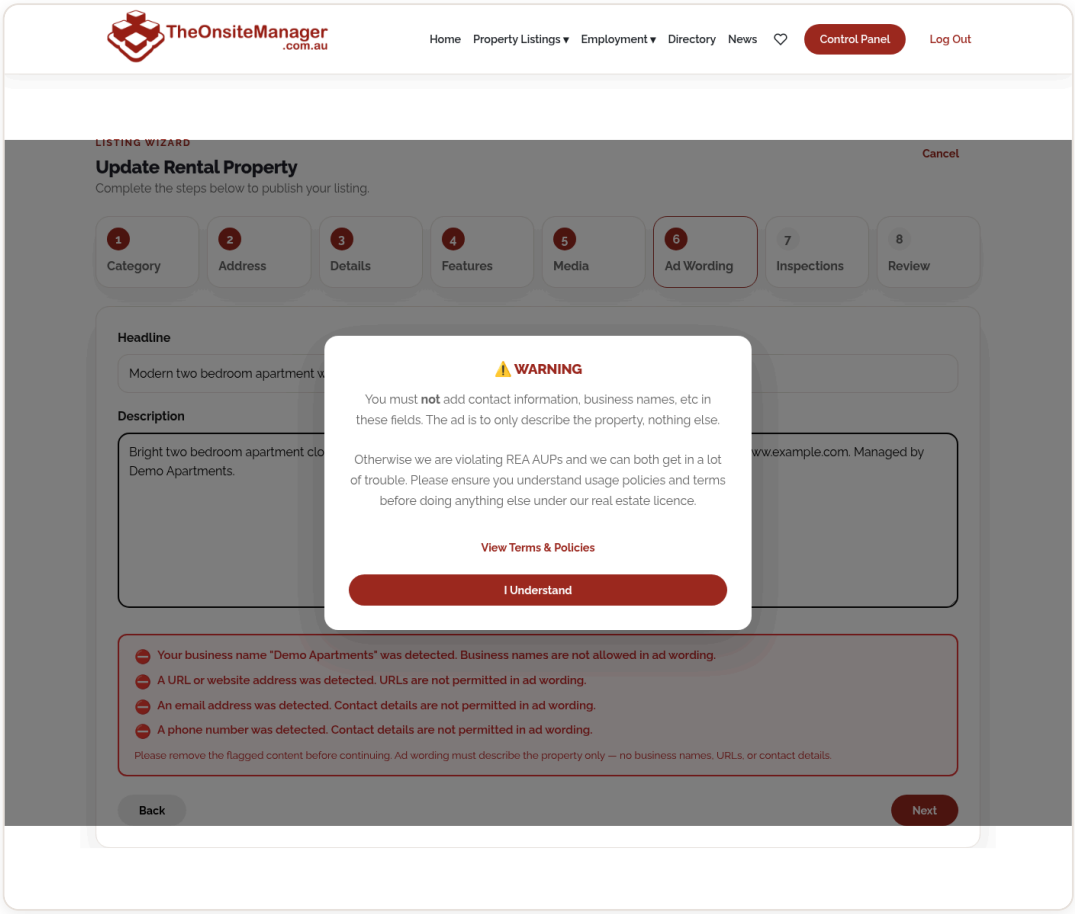
LIVE UI · DEMO DATA Figure 33. Step 6: headline and description.

1. **Headline**: one short line that sells the property, for example "Renovated 2-bed apartment with river views".
2. **Description**: several short paragraphs about the property: the layout, light, storage, outdoor space, building facilities, transport, schools and shops nearby.
3. Choose **Next**. If the checker finds a problem, it lists it in red and stops you continuing until it is fixed.

8.2 What the wording checker blocks

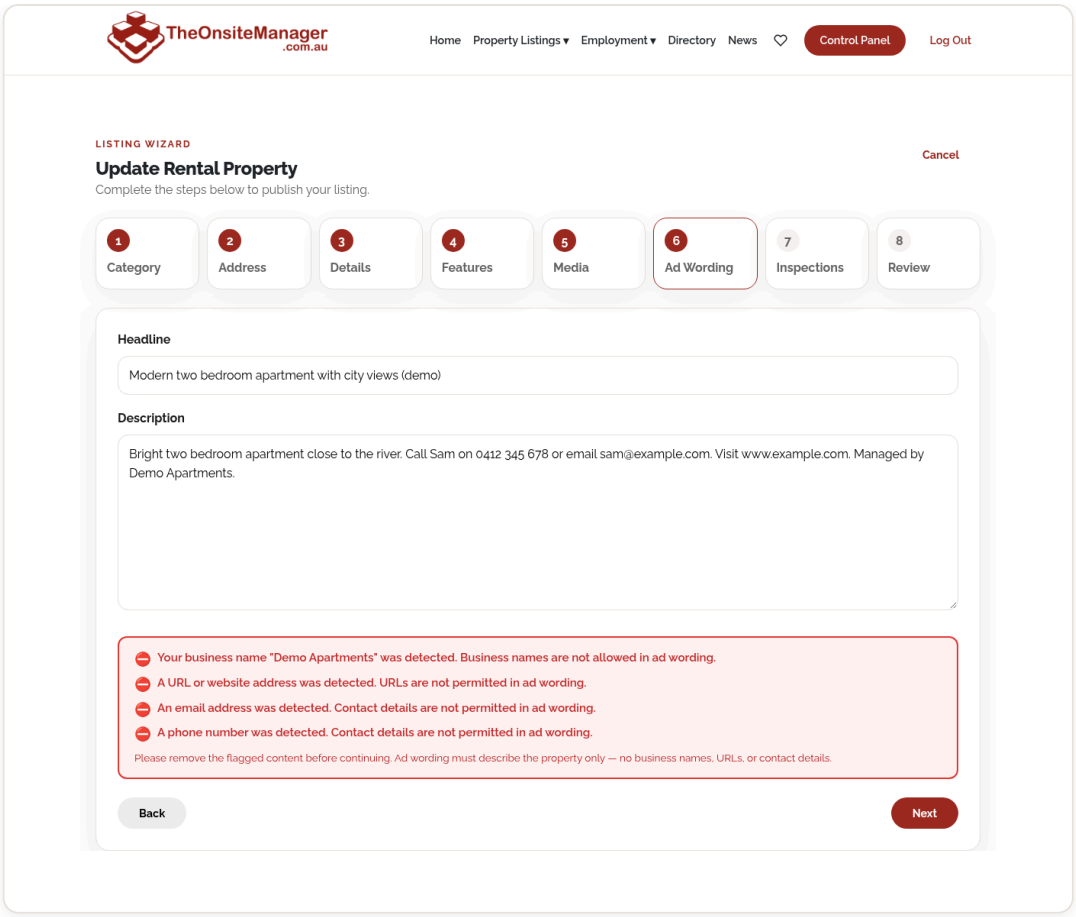
The first time you type in these fields, a one-off warning appears:

> You must **not** add contact information, business names, etc in these fields. The ad is to only describe the property, nothing else. Otherwise we are violating REA AUPs and we can both get in a lot of trouble. Please ensure you understand usage policies and terms before doing anything else under our real estate licence.
>
> Wording-checker warning shown in the listing wizard



LIVE UI · DEMO DATA Figure 34. The one-time warning that appears when the checker first finds a problem.

After you choose **I Understand**, each problem is listed:



LIVE UI · DEMO DATA Figure 35. The checker found a business name, a website, an email and a phone number. All must be removed before you can continue.

The checker blocks…	Message	Example to remove
Your **business name** (as a whole word)	Your business name "…" was detected. Business names are not allowed in ad wording.	"Managed by Demo Apartments"
Websites / URLs	A URL or website address was detected. URLs are not permitted in ad wording.	"www.example.com", "visit our site"
Email addresses	An email address was detected. Contact details are not permitted in ad wording.	"email sam@…"
Phone numbers	A phone number was detected. Contact details are not permitted in ad wording.	"Call 04xx xxx xxx"

ℹ️ **Why?**
The REA Acceptable Use Policy bans advertising the agency or agent inside the listing, misusing fields, and off-platform contact details or links. Enquiries must come through the portal's own enquiry button. TheOnsiteManager then routes them to you, logs them in your CRM and sends the autoresponder with your details and the application link (Chapter 14). See Chapter 23 for the rules in full.

💡 Your name, phone number and photo are already shown in the agent panel of every portal listing. You don't need them in the description.

The checker runs on rentals, residential sales and commercial listings. It doesn't run on management rights, hospitality or employment ads, but the same good practice applies.

8.3 Words that lock a rental's status

If a rental's headline or description contains **"leased"**, **"under application"** or **"pending"**, the Review step locks the status to **Off Market**:

> 🔒 The words "leased", "under application", or "pending" have been detected in your headline or ad wording. Status has been locked to Off Market.

This stops a listing that has effectively been taken from staying on the portals. If the property is still available, remove the words. If it has been leased, use the Leased status (10.6).

8.4 Other wording rules

- Describe **only this property**. No other listings, no "we have more properties", and no other agencies.
- Be accurate. No misleading claims about size, views, distances or price.
- Don't use **discriminatory** wording (for example "no children" or "suit a professional couple only").
- Don't copy another agent's wording or photos.
- Rentals: the application link is added for you (Chapter 13). Don't type your own links.

8.5 Example

❌ Fails the checker

Bright 2 bed unit close to the river. Call Sam on 04xx xxx xxx or email sam@... to inspect. Visit www.... for more listings. Managed by Demo Apartments.

✅ Passes

Bright two-bedroom apartment a short stroll from the river. Open-plan living flows to a sunny balcony. The kitchen has stone benches and a dishwasher. Both bedrooms have built-in robes. The building has a pool and secure parking. Buses and cafés are at the door.

🎧 **"Why won't it let me go to the next step?"**

Look for numbers the checker reads as a phone number: any **8-digit number** (such as a Listing ID or reference number), or a long run of digits **starting with 0 or 61**, even with spaces, dots or dashes between them. Also check for your business name used as an ordinary word. Rewrite or remove the text, then choose Next again.

CHAPTER 9

Inspections and open homes (QR check-in)

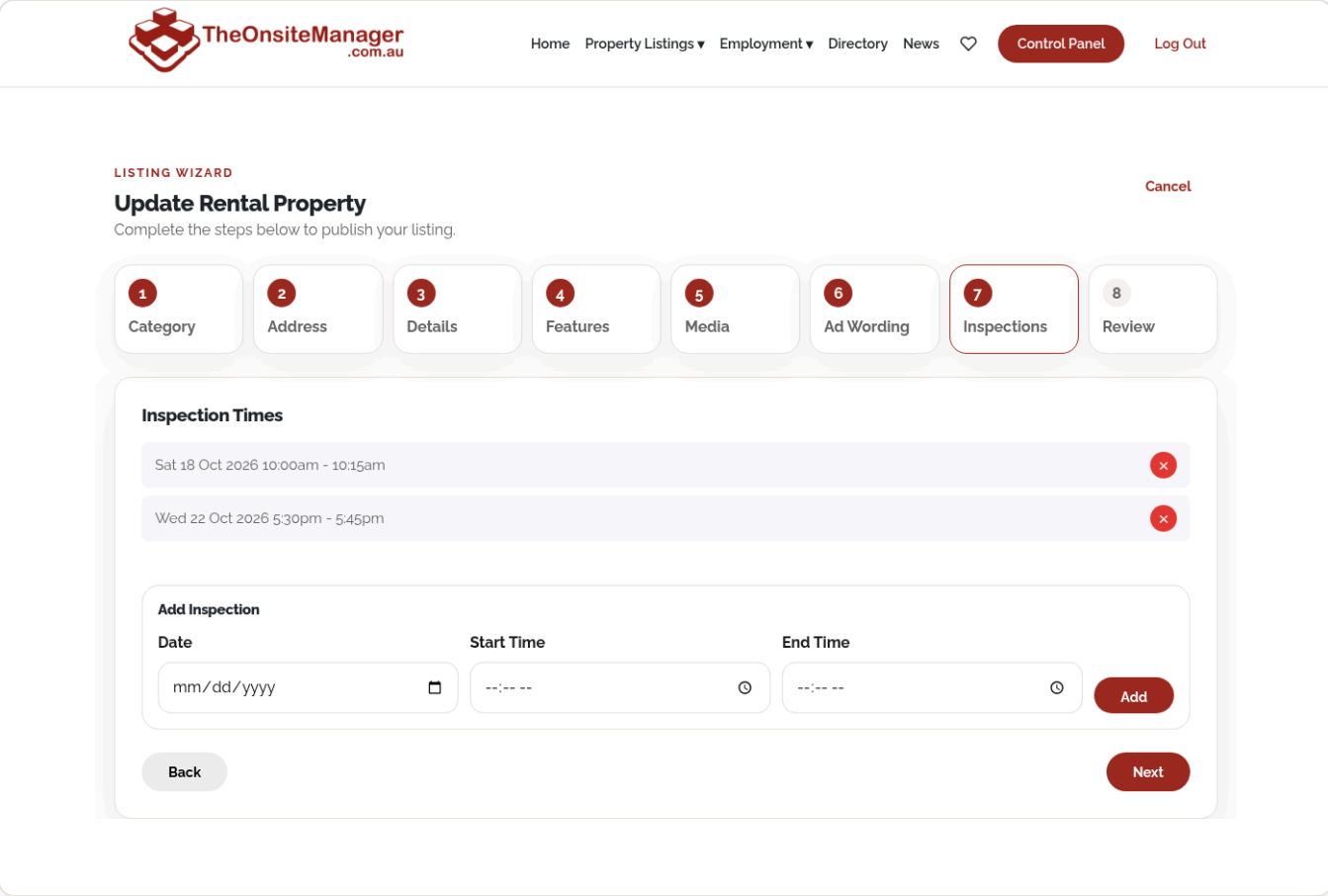
Schedule inspections, let people book, and register attendees with a QR code.

ℹ️ This chapter is about **advertising** inspections and open homes for prospective tenants and buyers. For entry, exit and routine **condition reports**, see THE Inspection Manager (Chapter 25).

In this chapter

- Adding inspection times
- How renters and buyers book
- Open-home QR check-in and where attendees appear
- Your Ideal Week availability

9.1 Adding inspection times



LIVE UI · DEMO DATA Figure 36. Step 7: existing inspection times (with a remove button) and the form to add another.

1. In the wizard, go to **Inspections** (Step 7; rentals and sales only).
2. Under **Add Inspection**, choose the **Date**, **Start Time** and **End Time**.
3. Choose **Add**. The time appears in the list above. Remove one with its red ×.

4. Go to **Review** and **Publish** so the portals receive the times.

⚠️ If the end time is earlier than the start time, a warning appears. Fix it before you continue. Past inspection times are not shown on the portals.

ℹ️ CLONE doesn't copy inspection times, so a new listing never shows stale dates. Add fresh times to every cloned listing.

9.2 How people book an inspection

- On the public TheOnsiteManager listing, the **Book Inspection** button opens the booking page for that listing.
- Every enquirer automatically receives an email with an inspection booking link and, for rentals, the application link (14.11).
- On REA and Domain, inspection times show in the listing. Bookings made through Inspect Real Estate (iRE) come back as enquiries.

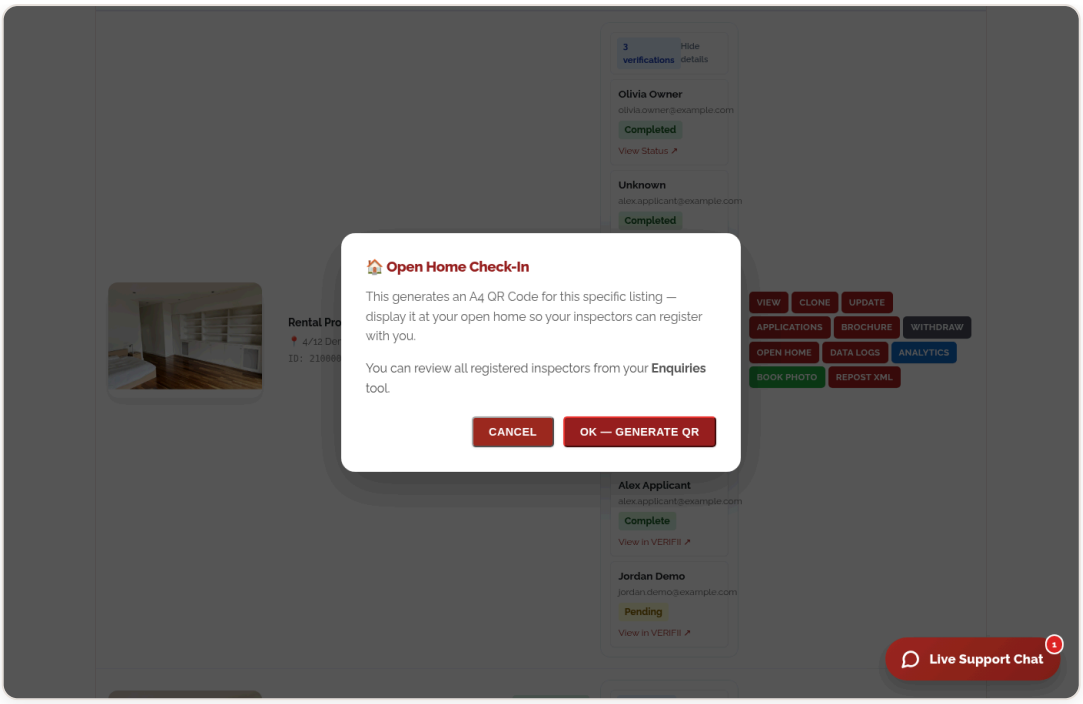
🎧 **From the support desk**
Inspections, open homes and QR check-ins account for about **141 tickets** (11th). The most common issue is "I can't see the inspection on Inspect Real Estate". Inspect Real Estate needs your agency sub-organisation to be set up, which depends on your profile details (ABN, corporate licence and address) being correct and complete. Check Chapter 21 and ask support to confirm your sub-organisation.

9.3 Seeing who booked

Bookings and inspection registrations appear in the **CRM**, Enquiries tab (Chapter 14). There you can filter by source, for example *Open Home Attendee* or *Inspect Real Estate/2Apply*.

9.4 Open-home QR check-in

Instead of a paper sign-in sheet, display a QR code at the door. Visitors scan it with their phone camera and register their details, which go straight into your CRM.



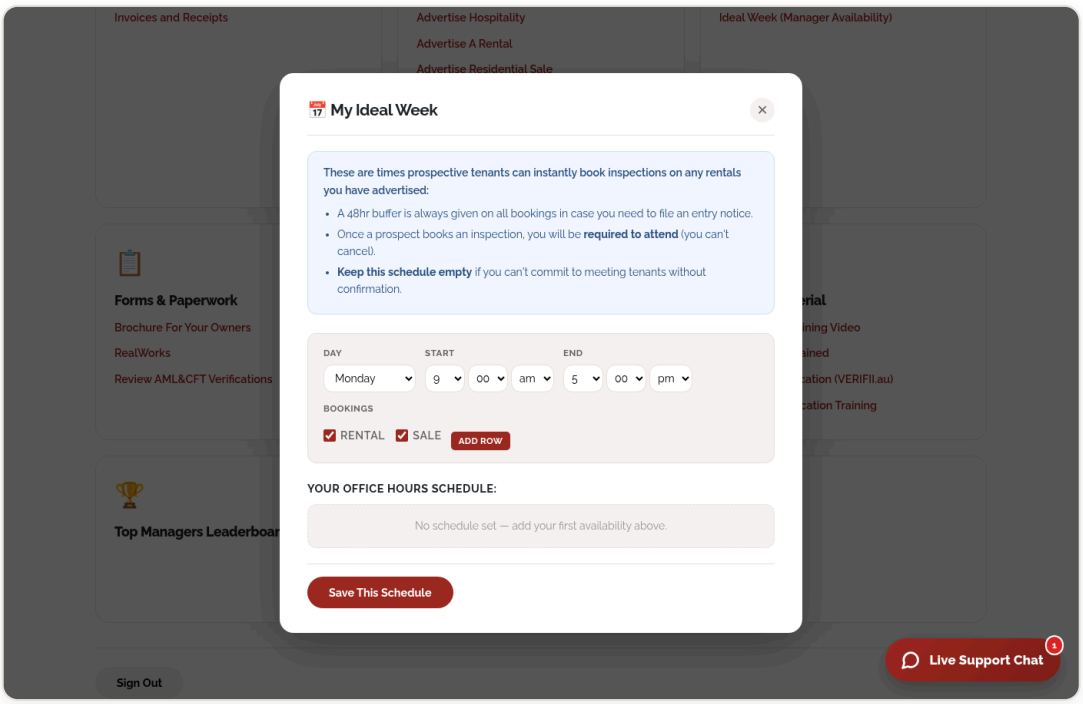
LIVE UI · DEMO DATA Figure 37. OPEN HOME on My Listings generates an A4 QR code for that listing.

1. On **My Listings**, choose **OPEN HOME** on the listing.
2. Read the message: *"This generates an A4 QR Code for this specific listing — display it at your open home so your inspectors can register with you."*
3. Choose **OK — GENERATE QR**. A printable A4 page with the QR code opens in a new tab.
4. **Print it** (or show it on a tablet) and place it at the entrance.
5. Visitors scan the code and enter their details.
6. After the open home, open the **CRM** and, on the Enquiries tab, use **Filters** to choose **Open home attendee** to see everyone who registered.

💡 Each QR code belongs to **one listing**. Print a new one for each property, and never reuse a QR sheet from a different address.

💡 Follow up the same day. Open the attendee in the CRM, add a note (Call, SMS or Email) and a follow-up, and send the application link to interested renters (Chapter 16).

9.5 Ideal Week: your availability



LIVE UI · DEMO DATA Figure 38. Ideal Week: set the days and times you are available for inspections.

Ideal Week (Manager Availability) on the tools tab lets you set the days and times you are normally available for inspections. Bookings need at least **48 hours' notice**. You **must attend** any inspection that is booked into your availability, so keep it up to date when you go on leave.

CHAPTER 10

Editing live listings: address lock, clone, leased and withdraw

What you can change, what you can't, and the right way to re-advertise, lease or withdraw.

In this chapter

- Updating a listing and when an update costs money
- What can't change after payment (the address lock)
- Using CLONE correctly
- Marking a property Leased or Sold, and withdrawing a listing

10.1 Updating a listing

1. On **My Listings**, choose **UPDATE** on the listing.
2. The wizard opens on the **Review** step, with the heading "Update …".
3. Select the step you want to change (for example **Media** or **Details**) in the step boxes. Make the change.
4. Go back to **Review**, check the total, and choose **Publish**.
5. The updated listing is sent to the portals. REA and Domain usually refresh within a few hours.

When UPDATE is not available

The **UPDATE** button is hidden when a listing that has **ever been live** is now **Leased**, **Sold**, **Off Market** or **withdrawn**. Editing it and putting it back on the market would "refresh" or "recycle" an old ad, which REA bans. Use **CLONE** to create a new listing instead (10.4). (Brokers can always update management rights and hospitality listings.)

10.2 Will I be charged for an update?

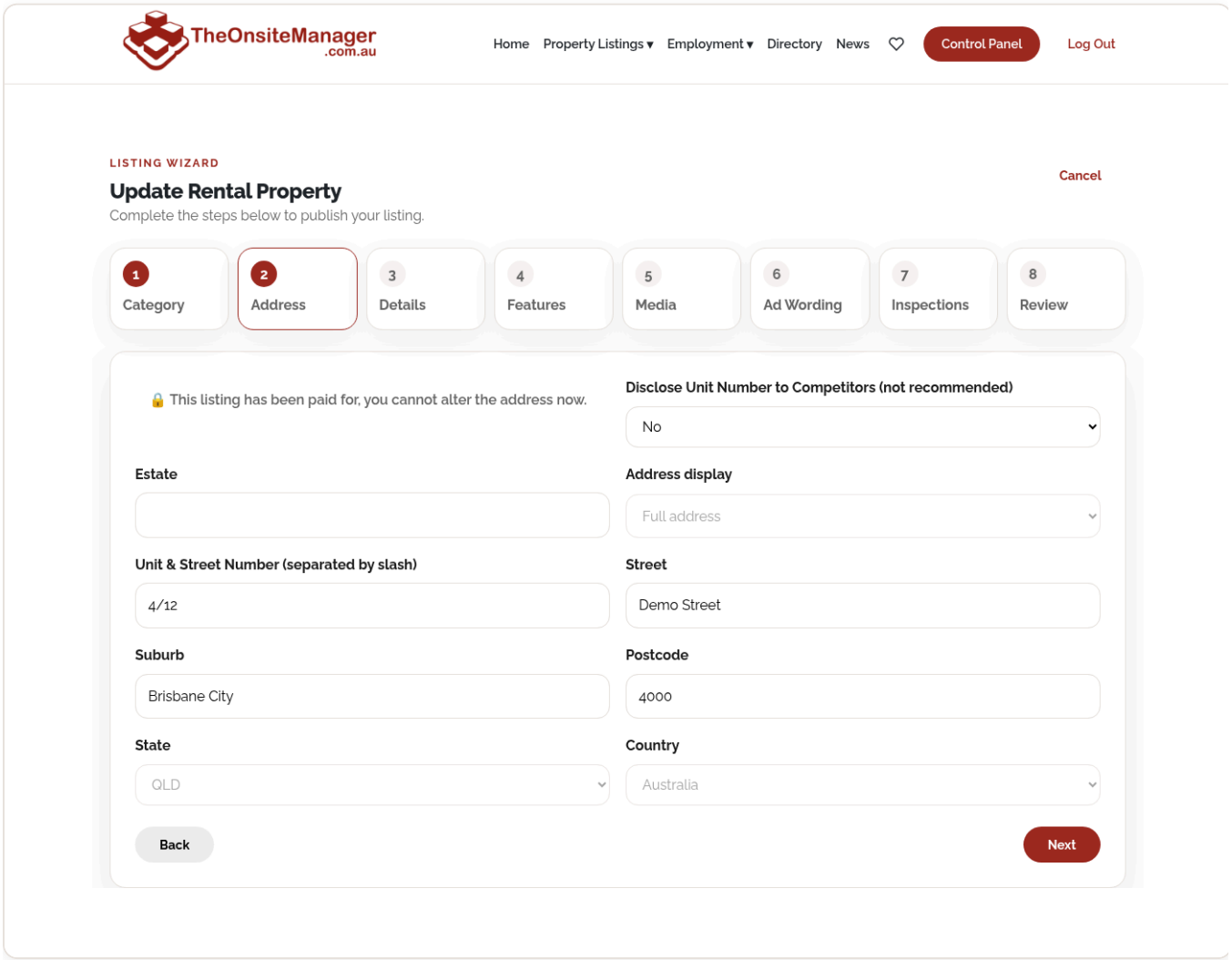
The Review step works out whether the REA fee is due. The total shows the amount **before** you publish. In general:

Situation	REA fee on update?
REA Standard paid in the last **14 days**	No
Rental: REA Standard paid within the rental advertising window (about **70 days**)	No. Unlimited updates.
Residential sale: REA Standard paid within **9 months**	No. Unlimited updates.
The listing has been **hidden, Leased or Sold** and off REA for **more than 5 days**, and you republish it	**Yes**. It is treated as a new REA listing.
Never paid for REA (Skip chosen originally)	Yes, if you now choose an REA level

You choose a **Feature, Highlight or Premier** upgrade	Yes. The upgrade price applies (11.4).

> 🎧 **From the support desk**
> "Why is it asking me to pay just to change the photos?" This comes up in about **115 tickets**. The usual reason is that the listing was leased or withdrawn and is being brought back after more than 5 days, or the paid window has ended. If the property is available again, the correct approach is a **new listing** (CLONE). If you think the charge is wrong, choose **Save As Draft/Inactive** (no charge) and ask support before you publish.

10.3 What can't change after payment: the address lock



LIVE UI · DEMO DATA Figure 39. After payment the address fields are locked: "This listing has been paid for, you cannot alter the address now."

Once a listing has been paid for, the address is **locked**:

> 🔒 This listing has been paid for, you cannot alter the address now.

- The **street number, street, suburb, postcode, state and country** can't be changed.
- **Exception:** if the category needs a unit number and none was entered, the unit field can still be filled in.

- You **can** still change the display options (Disclose Unit Number, Address display), plus price, photos, wording, inspections, features and status.

> ℹ️ **Why is the address locked?**
> REA charges per property address. Changing the address of a paid listing would turn it into a different property without paying, and REA treats it as a recycled listing. Domain also rejects address changes on listings it already holds.

Fixing a wrong address

1. On My Listings, choose **WITHDRAW** on the listing with the wrong address (10.7).
2. Choose **CLONE** on the same listing to make a new draft copy.
3. On the copy, go to **Address** and enter the correct address. A new, unpaid listing isn't locked.
4. Publish the new listing and choose an REA level. Unfortunately, a new REA fee applies.

> 💡 Prevention is cheaper: always pick the address from the suggestions, and double-check the unit number **before** paying.

> ⚠️ **Domain and address changes**
> Domain **blocks a published ad if its address changes**. Don't try to correct the address of a listing that is already on Domain; withdraw it and CLONE it with the right address (10.4).

10.4 CLONE: making a new listing from an old one

CLONE creates a new **draft copy** with a new Listing ID. Use it to:

- re-advertise a property that was leased or sold before and is available again;
- fix a wrong address (10.3);
- advertise a similar unit in the same building (then change the unit number, price and photos).

1. On My Listings, choose **CLONE**. Confirm "This will create a new draft copy."
2. The new draft opens on the Review step.
3. Check every step. In particular, check the **address** (and unit), **price**, **date available**, **photos** and **wording**.
4. Add new **inspection times** (they are not copied).
5. Choose the REA level and **Publish**.

Copied	Not copied
Category, address, details, features, wording, agent details and photos (if the original had photos)	REA payment and paid dates, the old listing's REA ad, status (the copy starts as a draft), inspection times, verifications and applications

ℹ️ **Each clone is its own REA ad**

A clone is sent to realestate.com.au as a **new ad**. It doesn't take over the old listing's REA ad, so publishing a clone (for example another villa in the same complex) won't make the original disappear from REA. If two of your listings ever replace each other on REA, ask support in Live Support Chat.

⚠️ Don't use one listing for a different property, and don't repeatedly withdraw and republish the same listing to push it back to the top of the results. Both count as duplicate or recycled listings under the REA rules (Chapter 23). REA also **refuses** very old recycled listings. Always start a fresh listing (CLONE) for each new advertising campaign.

🎧 **From the support desk**

Clone, old listings and re-advertising come up in about **80 tickets**. Guidance from the desk: "The address is locked once a listing is published. Please clone it to a new listing and correct it there. Recycling old listings is banned by REA."

10.5 Status changes at a glance

The property is…	Do this	Result
Leased (rental)	UPDATE → Review → Status **Leased** → Publish	Portals show it as leased, then remove it. Enquiries stop.
Sold	UPDATE → Review → Status **Sold**, enter the sale price and date → Publish	Portals show it as sold.
Under offer / under contract (sales)	UPDATE → Status **Under Offer** or **Under Contract** → Publish	The listing stays up with the status shown.
Owner has withdrawn, or the listing shouldn't be advertised	**WITHDRAW**	Hidden, set to Off Market, portals told to remove it
Still showing on a portal after Leased or Withdraw	**WITHDRAW AGAIN**, wait 24 hours, then contact support	The removal is re-sent to every portal

10.6 Marking a rental as Leased

1. On My Listings, choose **UPDATE**.
2. On **Review** → **Listing Status**, choose **Leased**.
3. Choose **Publish**. There is no charge to mark a listing leased.
4. My Listings now shows **Leased**. The UPDATE button disappears, and **WITHDRAW AGAIN** is available.

💡 Mark properties leased **on the day** the lease is agreed. The REA rules require sold and leased status to be updated promptly, and you'll stop getting enquiries for a property that is no longer available.

10.7 Withdrawing a listing

1. On My Listings, choose **WITHDRAW**.

2. Confirm: *"Withdraw listing … ? This will hide it and notify the portals."*
3. You'll see **"Listing withdrawn. Portals notified."** (or "Portal notification pending" if a portal is slow to respond).
4. The listing becomes Draft/Inactive and Off Market, and the button changes to **WITHDRAW AGAIN**.

🎧 **From the support desk**

Leased, inactive or withdrawn listings that are **still showing** or **still getting enquiries** are the **3rd most common** support topic (about 349 tickets). Work through these in order:

- Did you **Publish** after choosing Leased? Changing the drop-down alone does nothing.
- Allow up to 24 hours. REA and Domain process removals in batches.
- Choose **WITHDRAW AGAIN** to re-send the removal.
- Some sites copy listings from another portal rather than from us. For example, Allhomes updates from Domain and is often slow. These clear when the source portal updates.
- Still showing after 24 hours? Contact support with the Listing ID and the portal's link.

CHAPTER 11

Pricing, payments and portal upgrades

What things cost, how REA and Domain levels work, and how to pay.

In this chapter

- The cost of advertising each listing type
- REA levels: Standard, Feature, Highlight and Premier
- Domain levels: Standard, Silver, Gold and Platinum
- Checking prices before you list, and paying by card

⚠️ **Prices change**

Prices in this chapter are a guide only (October 2026, inc GST). REA prices depend on the **suburb** and change often. The Review step always shows the live price for your listing, and that is what you pay. Under the Terms, all fees are final and non-refundable except where the Australian Consumer Law requires otherwise (23.2).

11.1 What you pay for

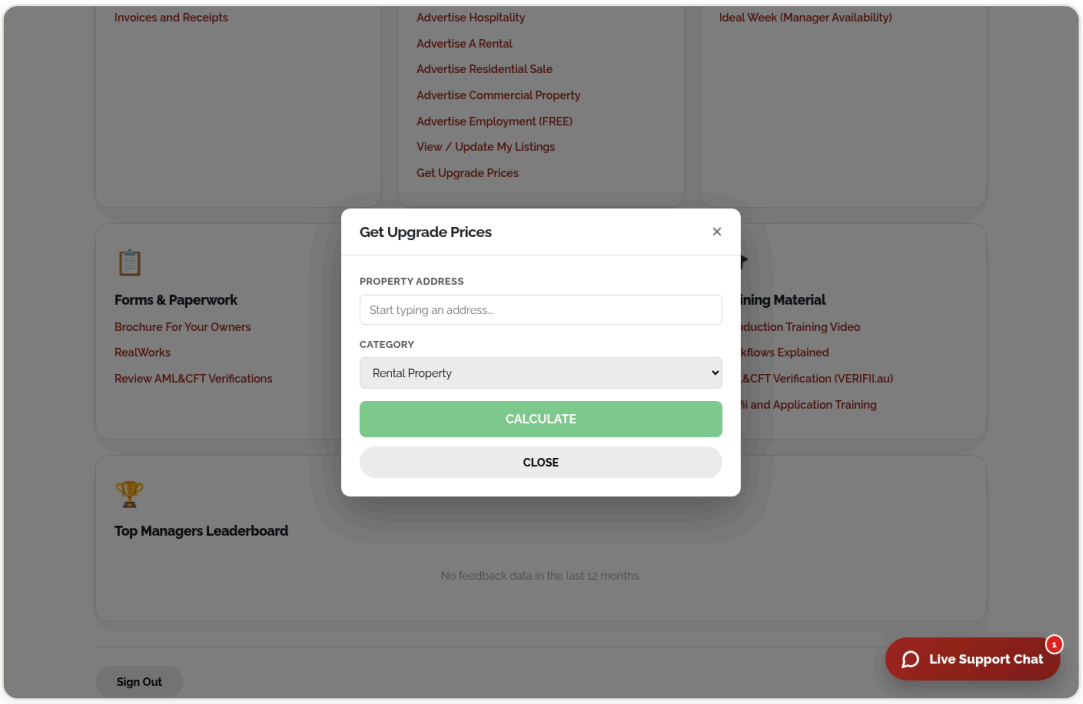
Item	Guide price (inc GST)	Where
Agent Agreement (desk fee)	LITE $465/yr · FULL $1,034/yr (ARAMA −10%)	Renewal window (12.4)
Listing on TheOnsiteManager	Included	–
REA Standard: rental	$50 per listing	Review step
REA Standard: residential sale	$413 per listing	Review step
REA Feature / Highlight / Premier	Varies by suburb (see 11.3)	Review step / Get Upgrade Prices
Domain Standard	Included	Review step
Domain Silver / Gold / Platinum: sale	$2,172 / $3,643 / $7,154	Review step
Domain Silver / Gold / Platinum: rental	Varies by price zone	Review step
Commercial (RealCommercial, incl. 90-day Enhanced)	$1,863	Review step
Management rights / hospitality feature	Monthly credits, 30-day Feature (Buy), or Pay Per Listing $2,277	Review step (6.4)
Photo enhancement	$10.35 per image	Review step
Professional photography	From $206	BOOK PHOTO (7.6)

Tenant NTD check (paid by the applicant, optional)	$38.50	VERIFII application (15.4)
Owner / vendor / purchaser AML verification	$38.50 ($88.50 with title search). Paid within VERIFII.	Chapters 18–19

11.2 How the REA Standard fee works

- REA Standard is charged **once per listing**, the first time you publish it to REA.
- After that you can update the listing for free during the advertising window: about **70 days** for a rental and **9 months** for a sale. Any listing paid in the last 14 days is always free to update.
- If the listing has been Leased, Sold or hidden for more than 5 days and you bring it back, the fee applies again. Use CLONE for a new campaign (10.4).
- On a paid listing, the Standard card shows **PAID** with the date.
- Choosing **Skip (FREE)** means the listing appears on TheOnsiteManager and partner portals but **not on REA**. My Listings then shows ⚠ **NOT ON REA**.

11.3 Checking prices before you list



LIVE UI · DEMO DATA Figure 40. Get Upgrade Prices: enter an address and category to see REA prices for that suburb.

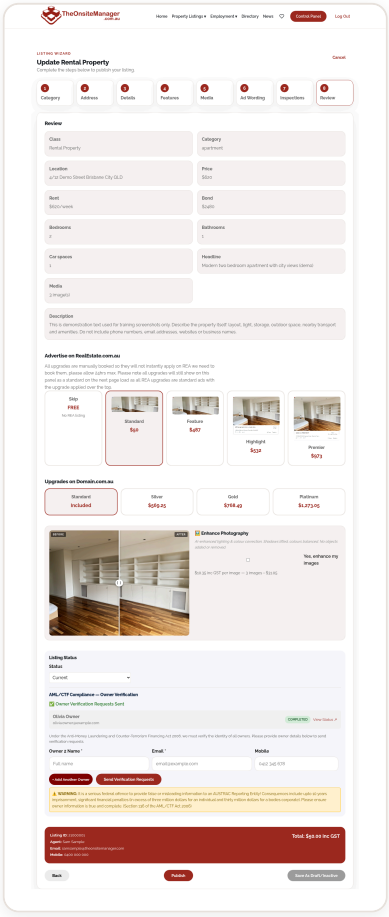
1. On the Manager Tools tab, choose **Get Upgrade Prices**.
2. Type the **property address** and pick it from the suggestions.
3. Choose the **category** (for example Rental Property).
4. Choose **CALCULATE**. The Standard, Feature, Highlight and Premier prices for a 30-day campaign in that suburb are shown.

Use this when an owner asks what an upgrade would cost, before you create the listing.

11.4 REA upgrade levels

Level	What it is
Standard	A normal listing in the REA search results.
Feature	A larger card with more prominence than Standard.
Highlight	A bigger card with a larger photo and the agent's branding, placed above Standard and Feature listings.
Premier	REA's top level: the largest card and the top placement in the results for that area.

REA sets the presentation and placement of each level, and these change from time to time. The descriptions above are a general guide.



LIVE UI · DEMO DATA Figure 41. The REA and Domain level cards on the Review step. Prices shown are for the demo suburb.

> ℹ️ **Upgrades are booked by hand and still show as "Standard"**
>
> The wizard says: *"All upgrades are manually booked so they will not instantly apply on REA… please allow 24hrs max. Please note all upgrades will still show on this panel as a standard on the next page load as all REA upgrades are standard ads with the upgrade applied over the top."* So if you bought Highlight and the panel still says Standard, that's expected. Check REA itself after 24 hours.

> 🎧 **From the support desk**
>
> Portal upgrades account for about **75 tickets**. Most are "I paid for an upgrade but it still says Standard" (expected, see above) or "the upgrade isn't on REA yet" (allow up to 24 hours, then send the Listing ID and receipt through chat).

11.5 Domain levels

Every listing sent to Domain gets **Standard** at no extra cost. **Silver**, **Gold** and **Platinum** add more prominence. Sale prices are fixed. Rental prices depend on the price zone of the suburb.

11.6 Paying

1. On Review, check the **Total inc GST** in the red summary bar.
2. Choose **Publish**.
3. You are taken to a **secure card payment page**. Enter your card details and pay.
4. You return to TheOnsiteManager and see *"Payment of $… successful! Generating portal XML feeds…"*. Wait until it finishes.
5. Your receipt appears under **Invoices and Receipts** (Chapter 12).

⚠️ If you are not ready to pay, choose **Save As Draft/Inactive**. Drafts never charge. Don't publish to "test" a listing. Payments are non-refundable.

🎧 **From the support desk**

Payments, pricing and packages are the **number one** support topic (about 469 tickets). The most common questions:

- **"Why am I being charged again?"** The listing came back after being leased, sold or hidden for more than 5 days, or its window ended (10.2).
- **"What does Standard include?"** Standard REA plus Standard Domain and partner portals (Chapter 13).
- **"Where is my receipt?"** Invoices and Receipts, matched to your login email (12.2).
- **"Can I get a refund?"** Fees are non-refundable under the Terms, except as required by the ACL.

11.7 LITE users listing a sale

If you are on LITE and start a residential sale, the Review step offers an **Upgrade to FULL Deskfee**: $1,034 for 12 months, less a credit for the months left on your LITE plan ($39.08 per month remaining). The new FULL agreement runs for 12 months from today.

CHAPTER 12

Invoices, receipts and renewals

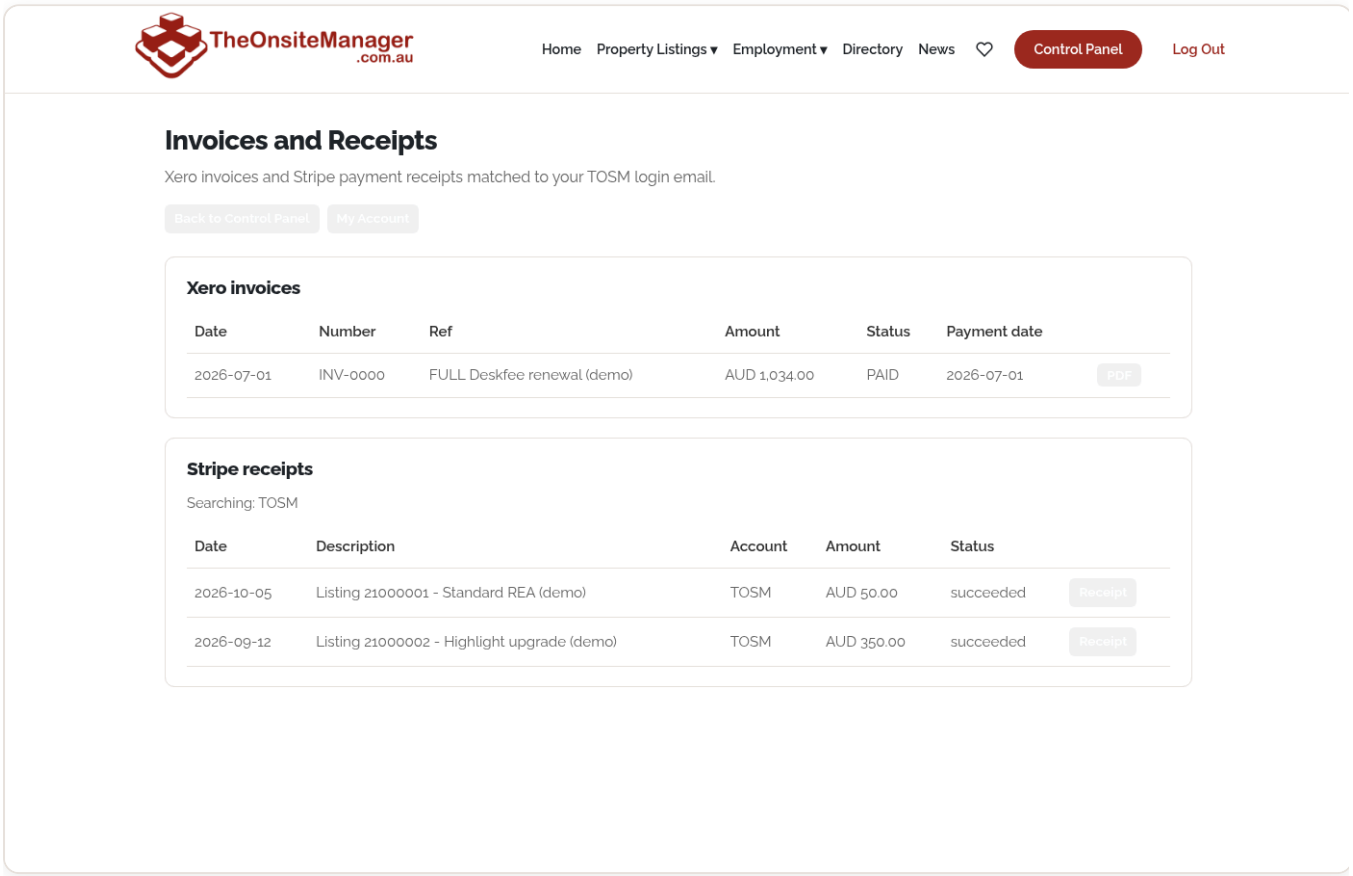
Find every invoice and receipt, and keep your Agent Agreement current.

In this chapter

- Downloading invoices (Xero) and card receipts
- Why a receipt might be missing
- Renewing, upgrading or downgrading your plan

12.1 Opening Invoices and Receipts

Go to the Control Panel → **Account Settings** card → **Invoices and Receipts**, or use the **Open Invoices and Receipts** button at the bottom of My Account.



LIVE UI · DEMO DATA Figure 42. Invoices and Receipts: Xero invoices at the top, card payment receipts below.

12.2 What you'll find there

Section	Contents	Download
Xero invoices	Tax invoices for your Agent Agreement and other invoiced services. Shows the date, number, reference, amount, status (for example PAID) and payment date.	**PDF** button on each row

Stripe receipts	Card payments made in the listing wizard and elsewhere: REA fees, upgrades, photography and renewals. Shows the date, description, account, amount and status.	**Receipt** button on each row

ℹ️ Both lists are matched to your **login email**. A payment made with a different email address (for example a colleague's card checkout) won't appear. Ask support to look it up, giving the date and amount.

🎧 **From the support desk**
Invoices and receipts account for about **63 tickets**. The standard answer: "Receipts are available in your Control Panel under Invoices and Receipts." If one is missing, give support the date, the amount and the last 4 digits of the card.

12.3 Giving an owner a receipt for advertising

1. Open Invoices and Receipts.
2. Find the payment (the description includes the Listing ID and the item, for example "Standard REA").
3. Choose **Receipt** and save or print the PDF.

12.4 Renewing your Agent Agreement

From 45 days before expiry, the renewal window appears in the Control Panel (3.4).

1. Choose **LITE** or **FULL**.
2. Tick **I am an ARAMA Member (10% discount)** if it applies.
3. Check the total and choose **Pay … & Renew**.

Change	What happens
Renew on the same plan	12 more months.
LITE → FULL (any time)	Pay $1,034 less $39.08 for each month left on LITE. Sales and RealWorks are switched on.
FULL → LITE (at renewal)	**RealWorks is removed and your RealWorks forms are deleted.** You can no longer list sales. Download your forms first.
Let it expire	Most tools are hidden and the renewal window can't be dismissed until you pay.

CHAPTER 13

Portal syndication: REA, Domain and partner portals

How your listing reaches the portals, how applications are linked, and what to do when a portal is wrong.

In this chapter

- Where your listing goes when you publish
- Getting a listing onto REA, and REA payment levels
- The Apply button and application links
- Withdrawals and portal errors
- Fixes for the most common portal problems

13.1 How syndication works

When you publish, TheOnsiteManager creates a data file (an "XML feed") for each portal and sends it automatically. You don't log in to REA or Domain yourself. TheOnsiteManager is the agency, and the portals receive your listing under the agency's account.

Portal	Gets your listing when…
realestate.com.au (REA)	You choose an REA level (Standard or above) and it is paid.
Domain	Every published residential listing (Standard included; Silver, Gold and Platinum extra).
RealCommercial	Commercial listings.
Partner portals (for example Homely, Inspect Real Estate, OnTheHouse, Rent.com.au, RealEstateView)	Published listings, as their feeds allow.
TheOnsiteManager.com.au	Every published listing.

⚠️ **Never contact the portals to change our account**
Don't ring REA or Domain to change the agency's account, logins or products. The Terms forbid LREAs from contacting the agency's suppliers to place orders or make changes (23.2). Ask support, and we'll deal with the portal.

ℹ️ Some sites copy listings from other portals rather than from us. For example, **Allhomes** updates from Domain, not from TheOnsiteManager. Problems on those sites usually clear when the source portal updates.

13.2 How long does it take?

- **TheOnsiteManager**: immediately.

- **REA and Domain**: usually within a few hours of publishing. Occasionally it takes until the next business day.
- **Upgrades** (Feature, Highlight, Premier): booked by hand, so allow up to 24 hours (11.4).
- **Removals** (Leased, Sold, Withdraw): usually within a few hours, and up to 24 hours.

13.3 Getting a listing onto REA

1. On My Listings, check the listing's Status column. If it shows ⚠ **NOT ON REA**, REA hasn't been paid.
2. Select the **NOT ON REA** pill and choose **UPDATE & PUBLISH** (or choose UPDATE).
3. On Review, choose an REA level: **Standard** or an upgrade.
4. Choose **Publish** and pay.
5. When REA accepts the listing, My Listings shows **PAID** and a blue **REA: 4xxxxxxxx** link. Select it to see the listing on REA.

🎧 **From the support desk**
"My listing is not on REA" or "REA hasn't updated" is the **5th most common** topic (about 307 tickets). Check in this order: (1) Is REA paid? Look for the PAID pill, and if you see NOT ON REA, it isn't. (2) Did you choose **Publish** after your change? (3) Has it been a few hours? (4) Is there a red ⚠ **ERROR** pill? (5) Open **DATA LOGS** to see when it was sent. Then contact support with the Listing ID.

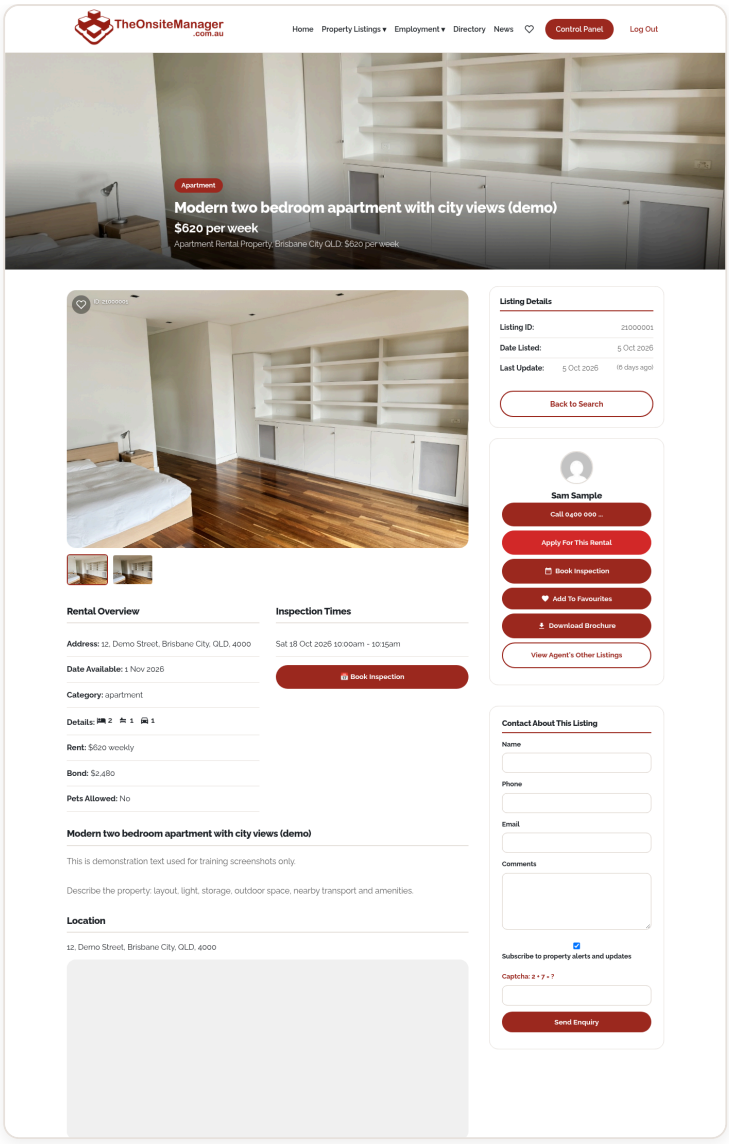
13.4 REA payment and upgrade levels

See Chapter 11 for prices. In short: **Standard** is charged once per listing (rentals about $50, sales about $413), and updates are free during the advertising window. **Feature**, **Highlight** and **Premier** are 30-day upgrades priced by suburb. They are booked by hand within 24 hours and still show as "Standard" on the panel.

13.5 The Apply button and application links

Applications for TheOnsiteManager rentals are handled by **VERIFII** (Chapter 15). Applicants reach the application in several ways:

Where the applicant is	How they apply
TheOnsiteManager listing page	The **Apply For This Rental** button in the agent panel opens the VERIFII application for that listing.
Any portal, after enquiring	Every enquirer automatically receives an email with an **apply link** and an **inspection booking link** (14.11).
REA listing	REA doesn't provide an Apply button for our feed. The application link is added for you as the **last line of the ad text**, and enquirers also get it by email.
After an inspection	Send them the listing's application link yourself (Chapter 16).



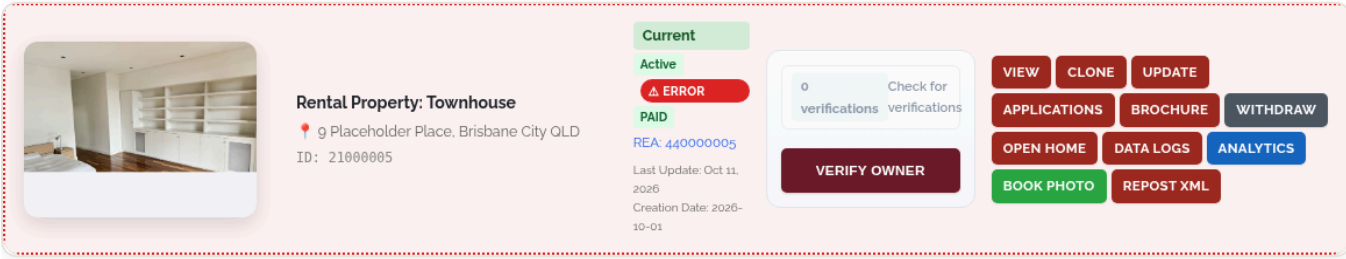
LIVE UI · DEMO DATA Figure 43. A rental listing page on TheOnsiteManager (demo). The agent panel shows Call, Apply For This Rental, Book Inspection, Favourites and Brochure.

> **2Apply / TenantApp**
>
> Applications used to go through 2Apply. They now go through VERIFII. Some older listings may still receive 2Apply applications through the copy of the listing held by Inspect Real Estate. If an applicant says they applied through 2Apply, check Inspect Real Estate for that application, and invite them to complete the VERIFII application as well.

13.6 Withdrawals and portals

WITHDRAW sends an "off market" update to every portal. **WITHDRAW AGAIN** re-sends it. See 10.7 for the steps and a checklist for listings that still show after withdrawal.

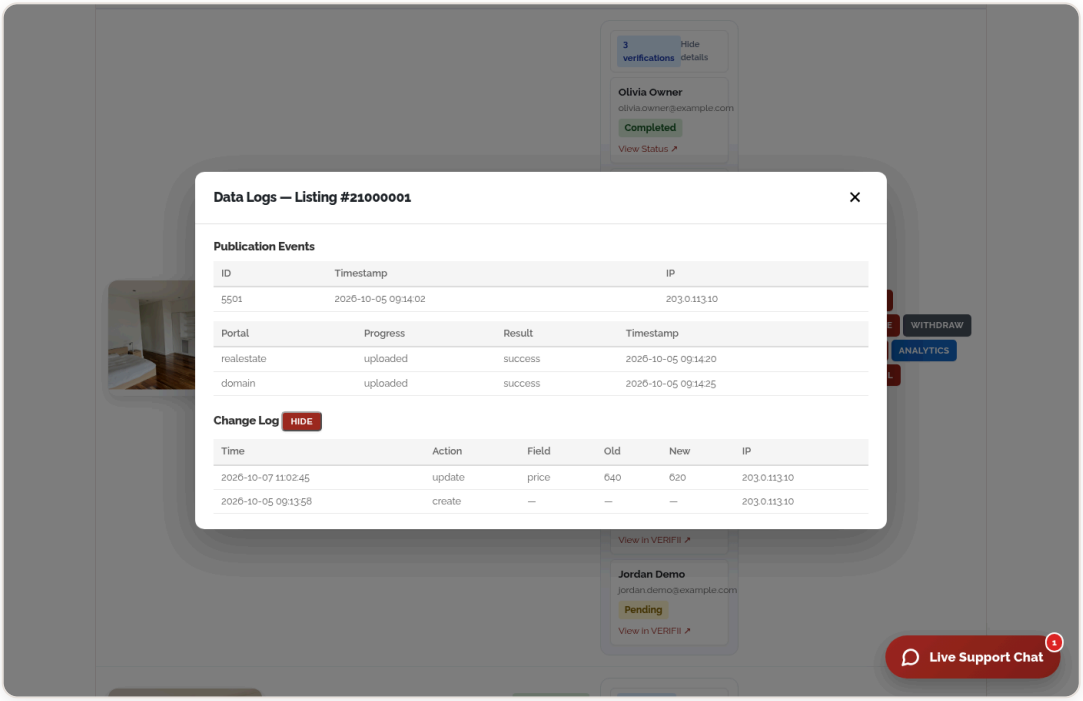
13.7 Portal errors



LIVE UI · DEMO DATA Figure 44. A listing with a red ERROR pill. Select it to see the portal's message.

1. Select the red ⚠ **ERROR** pill. The **Portal Update Error** window shows the portal's message.
2. Choose **EDIT LISTING** to fix the cause (for example a missing field or a disallowed image).
3. Publish again. If the error stays, contact support with the Listing ID and a screenshot of the message.

13.8 DATA LOGS: proof of what was sent



LIVE UI · DEMO DATA Figure 45. DATA LOGS: publication events, results from each portal, and the change log.

DATA LOGS on My Listings shows each publication event, when it was sent, the result from each portal, and a log of changes. Check it before you contact support. It often answers "was it sent?"

13.9 Domain-specific issues

- **Address changes**: Domain blocks a published ad if its address changes, and support can't re-send an address change to Domain. Don't edit the address; withdraw and clone instead (10.3, 10.4).
- **Price display**: Domain shows the Display Price. Leave it blank or write "Contact agent" if you don't want a price shown.
- **Photos not updating**: Publish again after the change and allow a few hours.

🎧 **From the support desk**

Domain issues account for about **145 tickets**, mostly address corrections and photo or price updates that haven't come through. For an address correction, support will usually ask you to withdraw and clone (10.3).

13.10 Portal FAQ

Q. Can I list only on Domain and still use VERIFII?

Yes. VERIFII applications work whichever portals you use.

Q. The REA link on My Listings opens a "listing not found" page.

REA may still be processing it, or it has been withdrawn or leased. Check the Status pills and DATA LOGS. If the listing should be live, contact support.

Q. The inspection doesn't show on Inspect Real Estate.

Your Inspect Real Estate sub-organisation must be set up from your profile details (ABN, corporate licence and address). Make sure Chapter 21 is complete, then ask support.

CHAPTER 14

Enquiries, autoresponders, CRM and analytics

Every enquiry from every portal in one place, answered automatically, and measured.

In this chapter

- How enquiries reach you
- The automatic reply every enquirer receives
- The CRM: Enquiries, Contacts, Pipeline, Tasks, Reports, Duplicates and Match alerts
- The contact card, lead ratings and notes
- Fixing "I'm not getting enquiries"
- Analytics and owner reports
- The Performance Report for owners

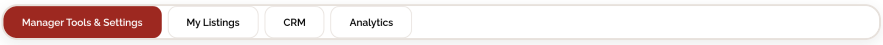
14.1 How enquiries reach you

1. A renter or buyer enquires on REA, Domain, TheOnsiteManager or another portal, or books or registers at an inspection.
2. The portal sends the enquiry to TheOnsiteManager.
3. TheOnsiteManager **logs it in your CRM** and emails it to your alias address, which forwards it to your inbox (2.4).
4. The enquirer automatically receives a **"Thanks for your enquiry"** email (14.11).

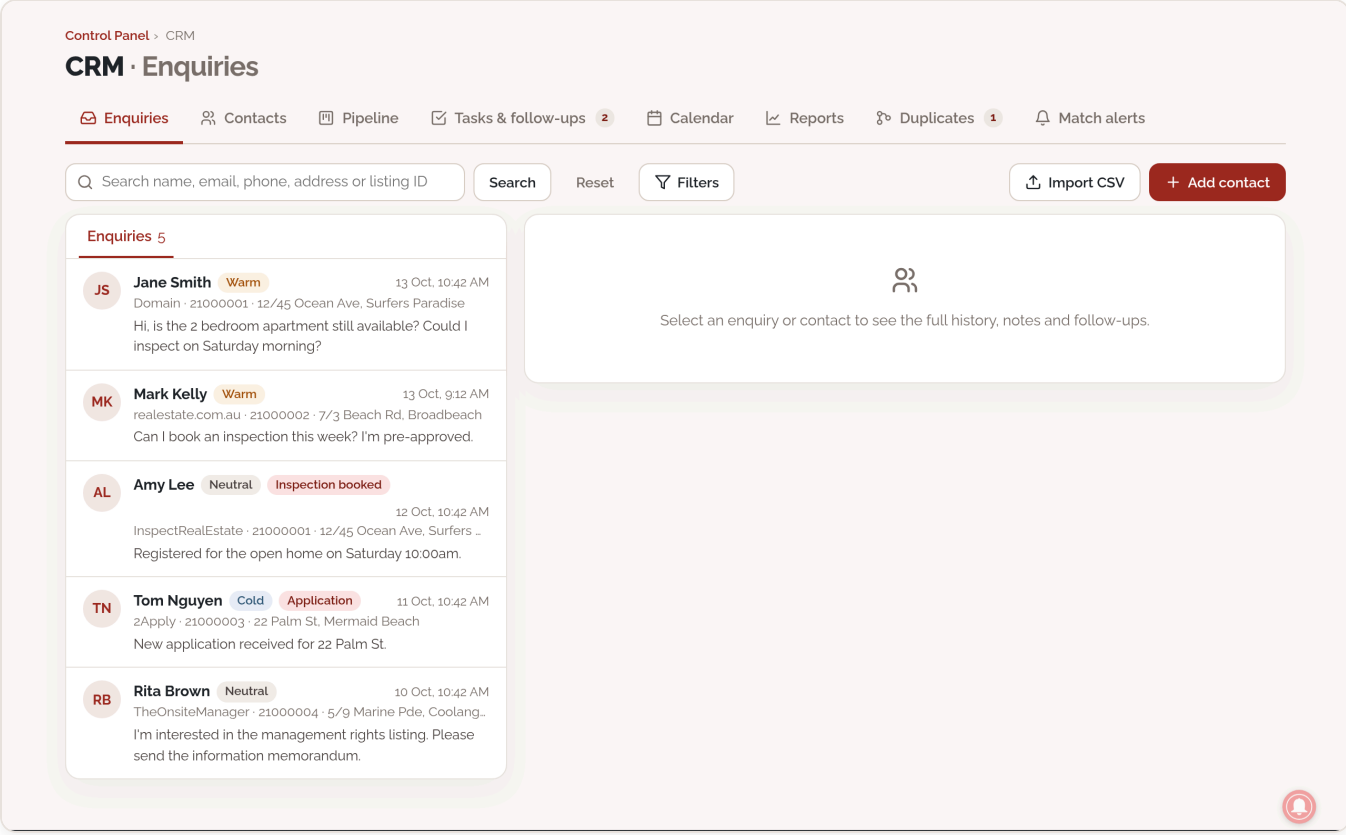
Portal enquiry emails from TheOnsiteManager have a **Reply to [name]** button. Choose it to open that contact in your CRM with the reply ready to write (14.5). The button signs you in for 7 days from the email; after that, or on someone else's device, you are asked to sign in as normal.

14.2 The CRM

All your enquiries, contacts, follow-ups and reports are on **one CRM page**, inside the normal TheOnsiteManager site. In the Control Panel, choose the **CRM** tab, or go straight to `theonsitemanager.com.au/crm`. Old links to the separate CRM Plus page and the CRM Calendar now open the matching tab here.



LIVE UI · DEMO DATA Figure 46. The single CRM tab in the Control Panel.

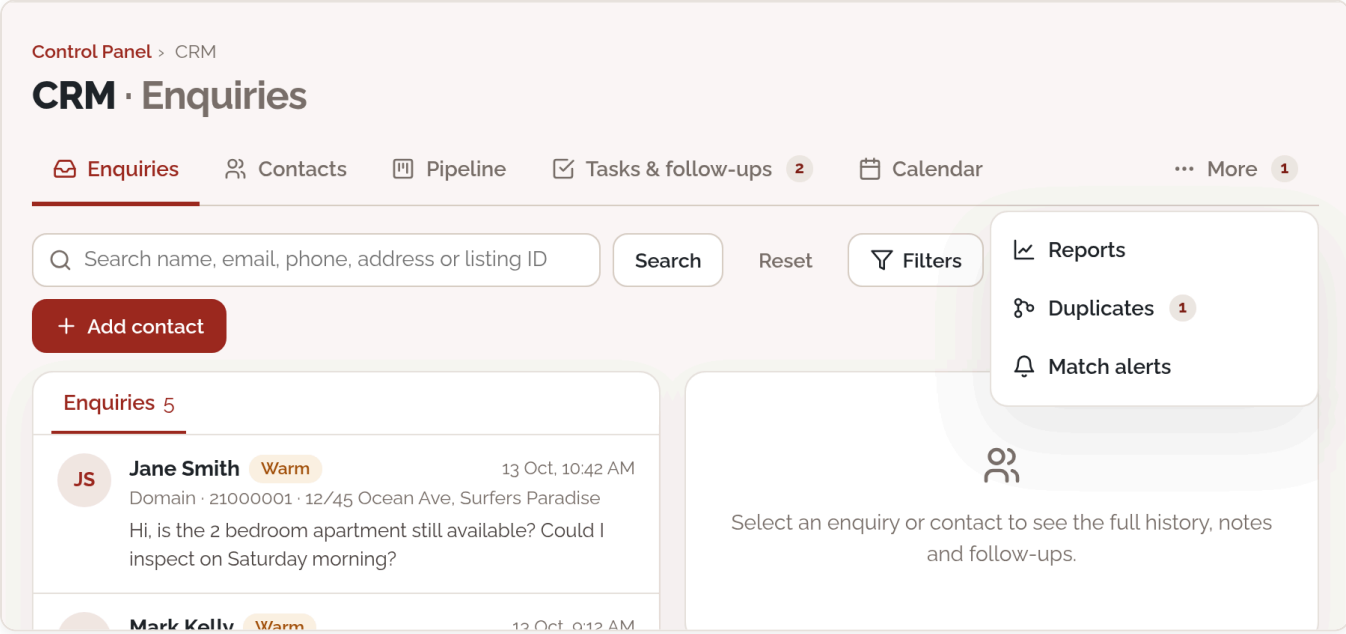


LIVE UI · DEMO DATA Figure 47. The CRM, Enquiries tab: the tab bar along the top, search and buttons, the enquiry list on the left and the contact card on the right.

The tab bar

Tab	What it's for
Enquiries	Every enquiry from every portal, newest first (14.3).
Contacts	Everyone who has enquired or been added, filtered by lead rating (14.4).
Pipeline	A board that shows where each lead is up to, from New to Leased/Sold (14.6).
Tasks & follow-ups	Your call-back list. The red number shows follow-ups due today or overdue (14.7).
Calendar	The CRM Calendar (Chapter 29). Shown when the calendar is switched on for your account.
Reports	Enquiries and response times by portal and by listing (14.8).
Duplicates	Contacts who appear twice with the same email or mobile number (14.9).
Match alerts	Saved searches that show which of your listings suit a contact (14.10).
Applications	All rental applications on your listings, from VERIFII and 2Apply (14.17). This tab used to be called VERIFII.
Performance report	Opens the printable Performance Report for owners (14.16).

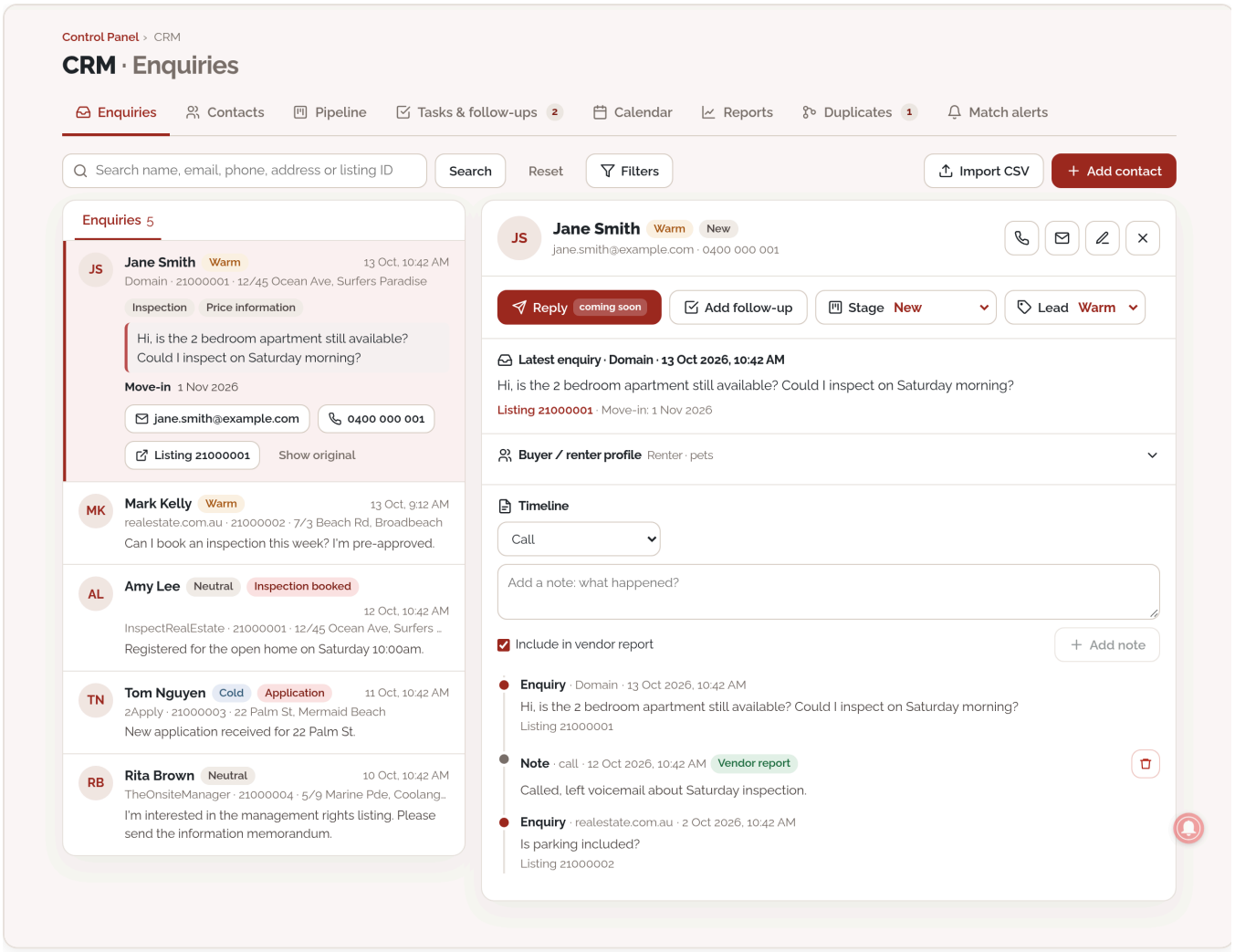
Numbers on a tab are things that need you, for example follow-ups due today. On a narrower screen the last tabs move into a **More** menu. On a phone, swipe the tab bar sideways.



LIVE UI · DEMO DATA Figure 48. On a narrower screen, Reports, Duplicates and Match alerts are under More.

14.3 Enquiries

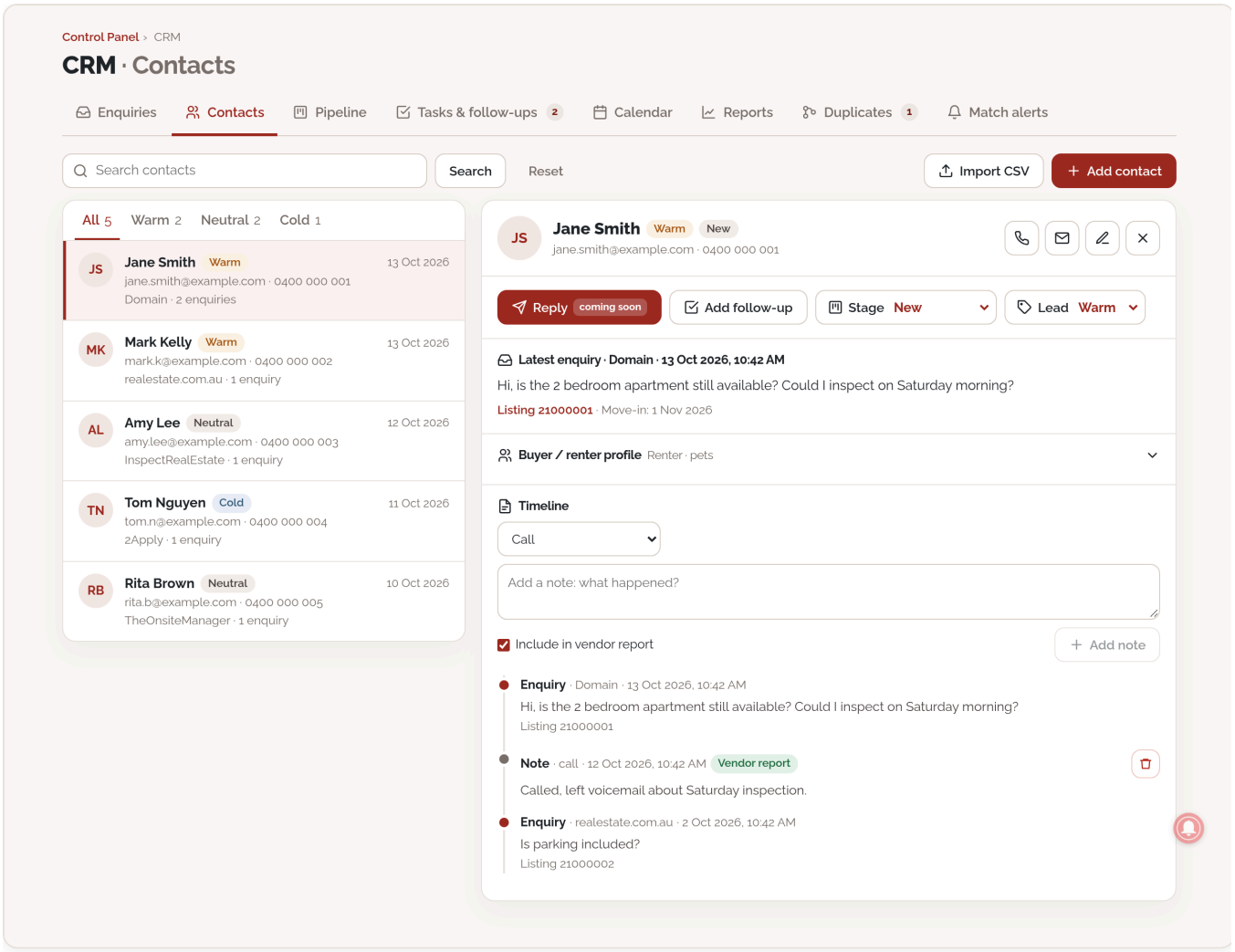
- **Search** by name, email, phone, address or Listing ID, then choose **Search**. **Reset** clears the search and filters.
- **Filters** narrows the list by **source** (realestate.com.au, Domain, Inspect Real Estate / 2Apply, TheOnsiteManager, Open home attendee), **listing** and **date**, and changes the sort order. The **listing** list shows all your own listings, with current listings first; pick one to see only its enquiries, or **All Listings** for everything. If the list only shows All Listings, refresh the page (Ctrl+F5, or Cmd+Shift+R on a Mac).
- Each row shows the person, their lead rating, the portal, the listing and the start of the message. Applications and inspection bookings get their own label.
- Select a row to open the full enquiry underneath it: what they asked for, their message, move-in date, finance and inspection details, plus buttons to email, call or open the listing. **Show original** shows the email exactly as the portal sent it. The person's contact card opens on the right.
- **+ Add contact** adds someone by hand. **Import CSV** uploads a spreadsheet of contacts (columns: name, email, mobile, address, and optionally leadStatus).



LIVE UI · DEMO DATA Figure 49. An enquiry opened in the list, with the contact card beside it.

14.4 Contacts

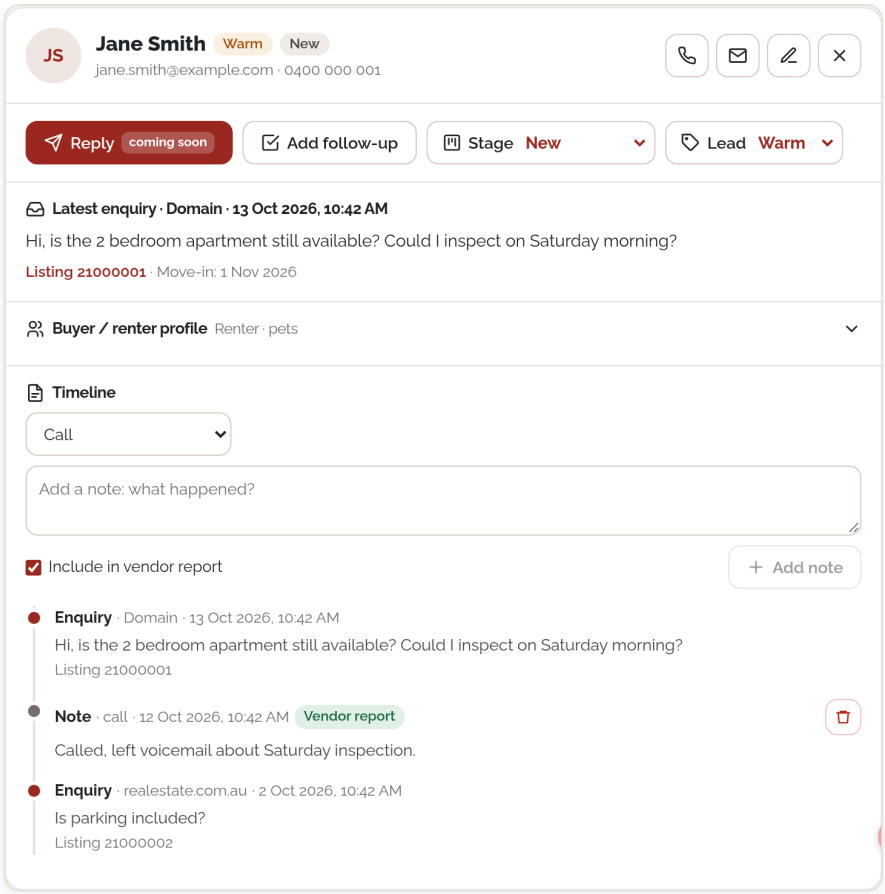
The Contacts tab lists people instead of individual enquiries. Use **All**, **Warm**, **Neutral** and **Cold** above the list to filter by lead rating. Each row shows the source, the number of enquiries and the last activity. Select a contact to open their card.



LIVE UI · DEMO DATA Figure 50. The Contacts tab, filtered by lead rating.

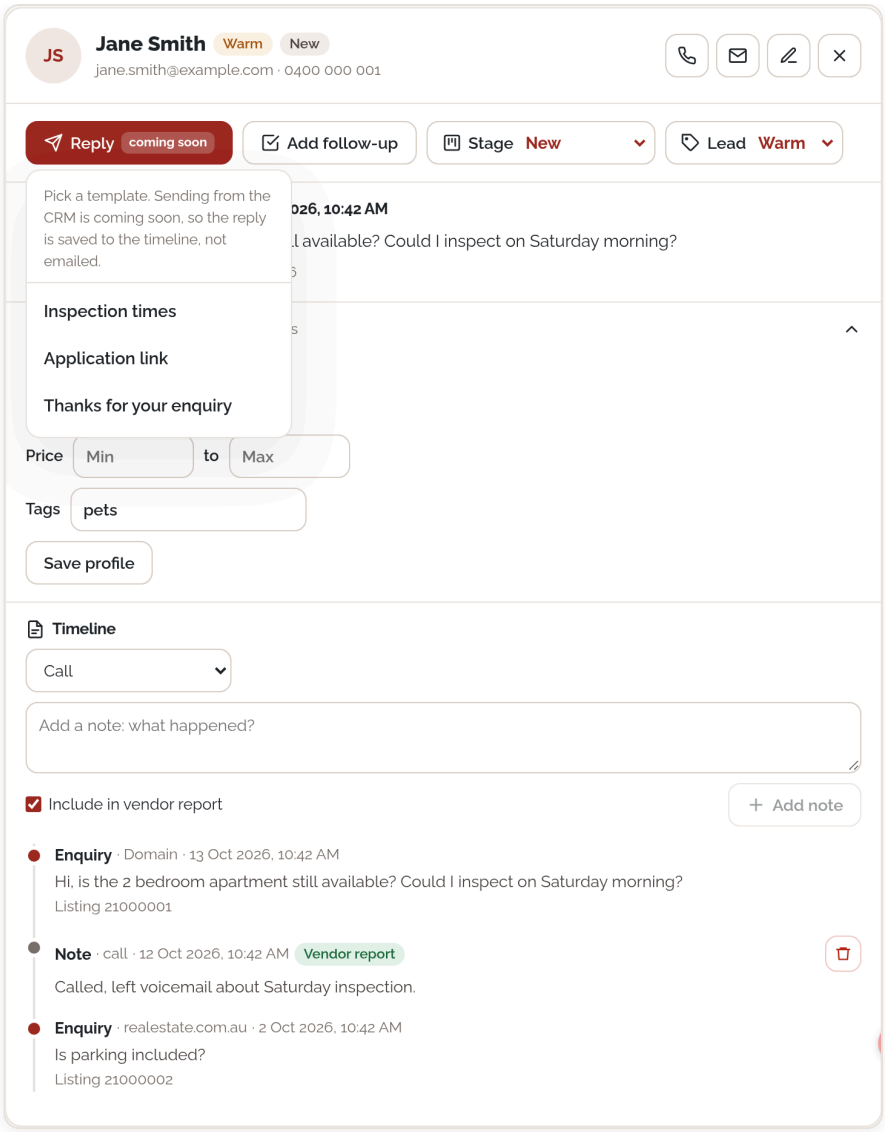
14.5 The contact card

Every tab opens the same contact card. On a computer it sits beside the list (or slides in from the right on the Pipeline, Tasks and Match alerts tabs). On a phone it fills the screen, and the back arrow returns to the list.



LIVE UI · DEMO DATA Figure 51. The contact card: the action buttons, the latest enquiry, the buyer/renter profile and the timeline.

1. **Top row:** the name, the lead rating and the pipeline stage. The round buttons call the person, email them from your own email program, or edit their details.
2. **Reply** opens **Reply with a template**. Pick a template; it is filled in with the contact's name and the listing, and your signature is added below the text when you send. Check the wording, then choose **Send email**. The email is sent to the contact from a TheOnsiteManager address with your email as the reply-to address, and it is logged on the contact's timeline. When the contact replies, their reply goes to your inbox as usual and is also added to the timeline. Contacts who have unsubscribed, or whose address bounces, can't be emailed; you'll see a message instead.
3. **Add follow-up** creates a task with a due date and time (14.7).
4. **Stage** moves the contact through your pipeline: New, Contacted, Inspected, Applied, Leased/Sold.
5. **Lead** rates the contact **Warm**, **Neutral** or **Cold**. This dropdown replaces the old Mark Warm, Mark Neutral and Mark Cold buttons.
6. **Latest enquiry** shows their most recent message and the listing it was about.
7. **Buyer / renter profile** (select it to open) records whether they're a buyer or renter, whether they have finance pre-approval, their price range and tags such as *pets* or *investor*. Choose **Save profile**.
8. **Timeline** lists every enquiry, note and logged reply in date order. To add a note, choose the type (Call, Left voicemail, Sent email, Sent SMS, Meeting, Other), type what happened and choose **Add note**. Tick **Include in vendor report** on notes the owner should see in their campaign report. The bin button deletes a note.

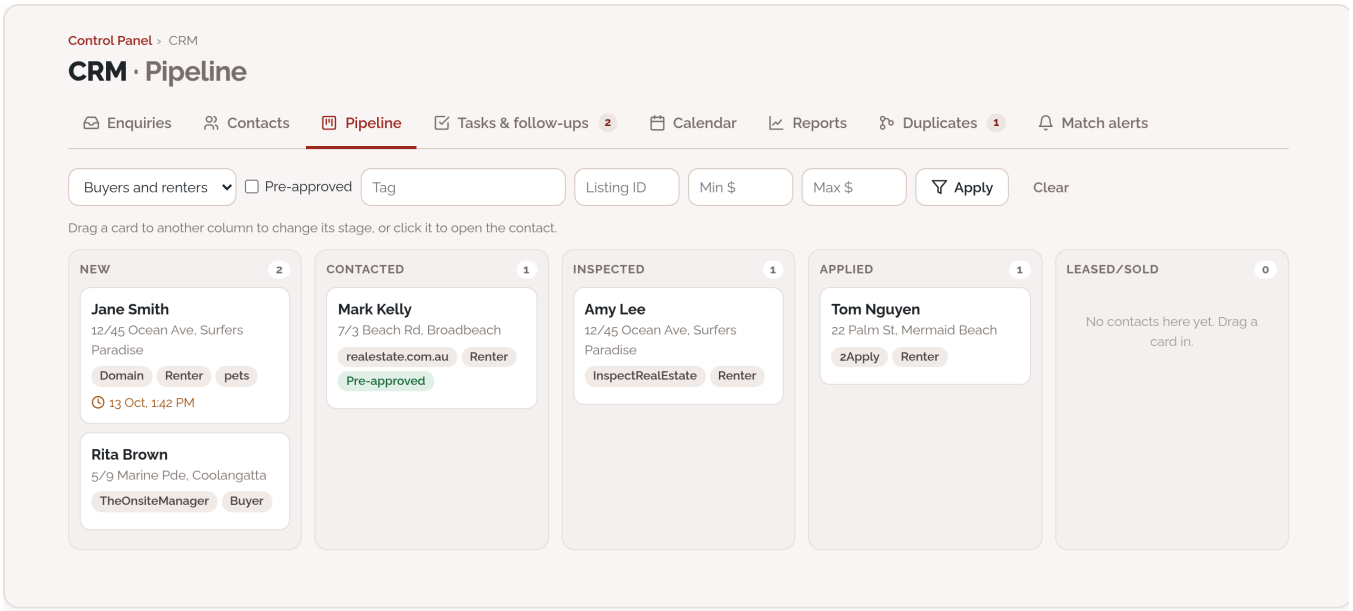


LIVE UI · DEMO DATA Figure 52. Reply with a template. Replies are emailed to the contact and logged on the timeline.

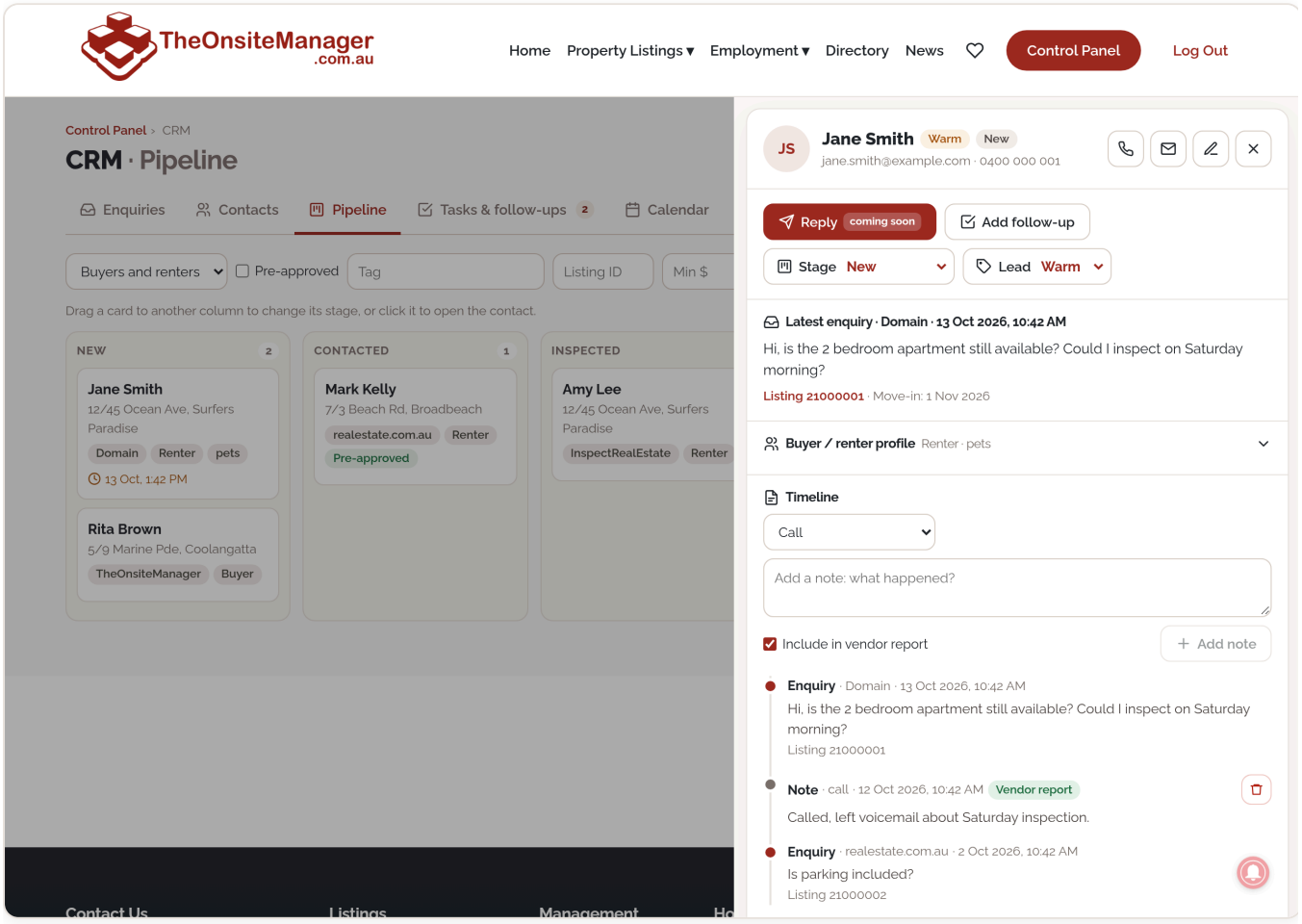
Rate every enquirer within 24 hours and add a follow-up for anyone Warm. Your Tasks tab then becomes your call-back list for the week.

14.6 Pipeline

The Pipeline board has one column for each stage. Drag a card to another column to change its stage, or select it to open the contact card. The filters at the top show only buyers or renters, pre-approved contacts, a tag, a listing or a price range.



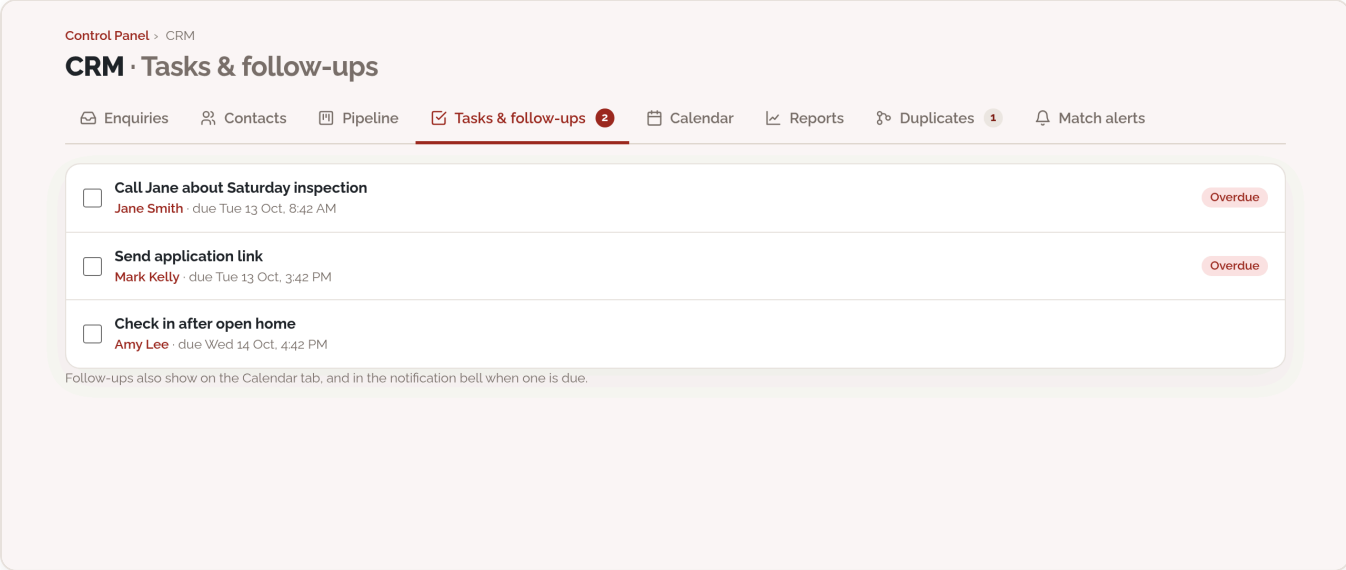
LIVE UI · DEMO DATA Figure 53. The Pipeline board.



LIVE UI · DEMO DATA Figure 54. Selecting a card opens the contact card from the right.

14.7 Tasks & follow-ups

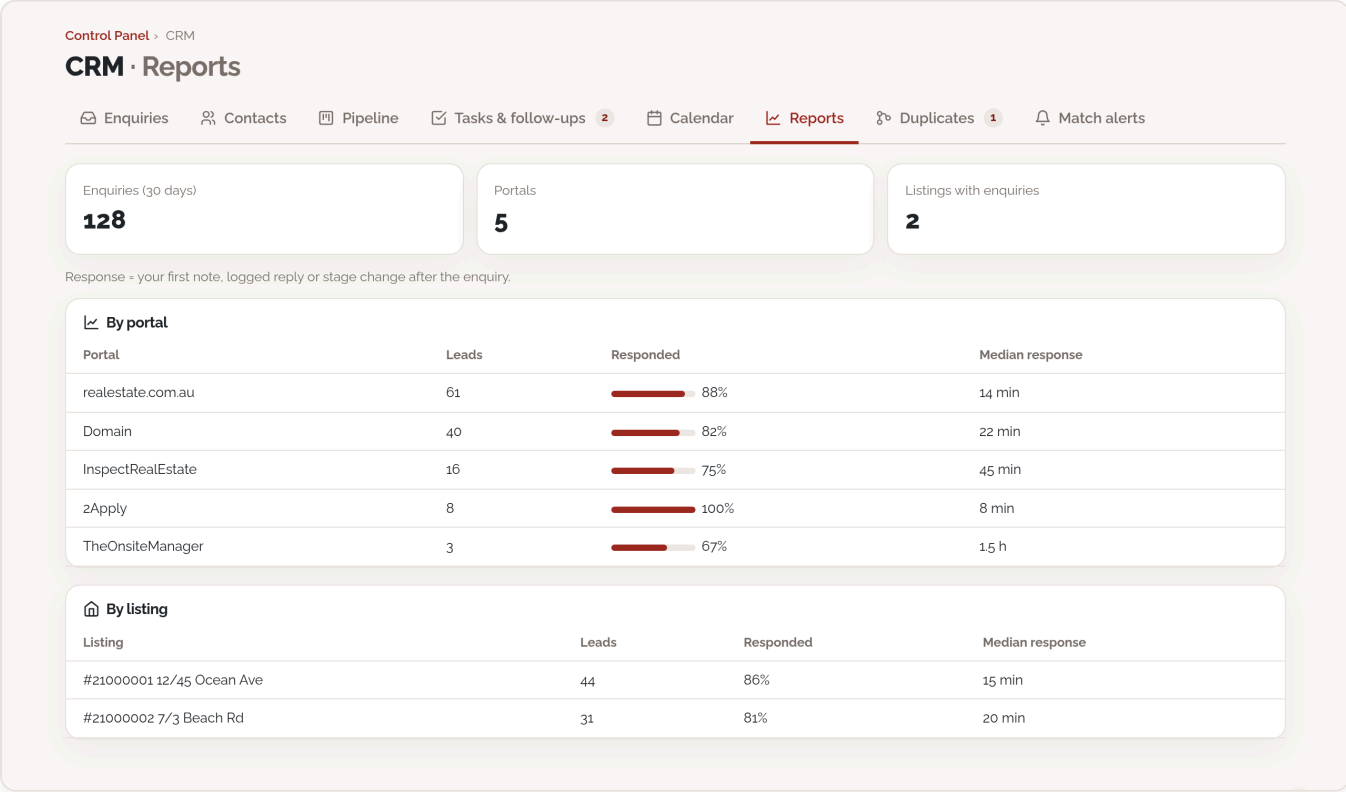
Every follow-up you create appears here with the contact and due time. Overdue follow-ups are marked **Overdue**. Tick the box when it's done (untick to undo). Follow-ups also show on the Calendar tab, and in the notification bell when one is due.



LIVE UI · DEMO DATA Figure 55. Tasks & follow-ups.

14.8 Reports

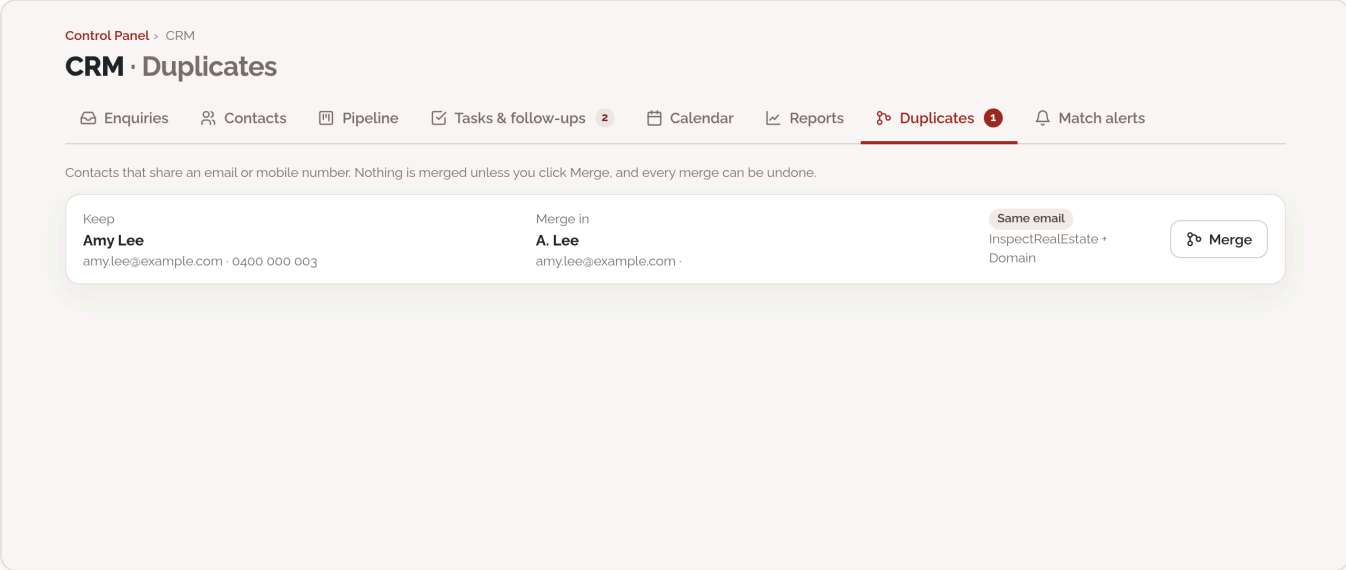
Reports shows how many enquiries you received in the last 30 days, and, for each **portal** and each **listing**, how many leads you responded to and your median response time. A response is your first note, logged reply or stage change after the enquiry.



LIVE UI · DEMO DATA Figure 56. Reports: enquiries and response times by portal and by listing.

14.9 Duplicates

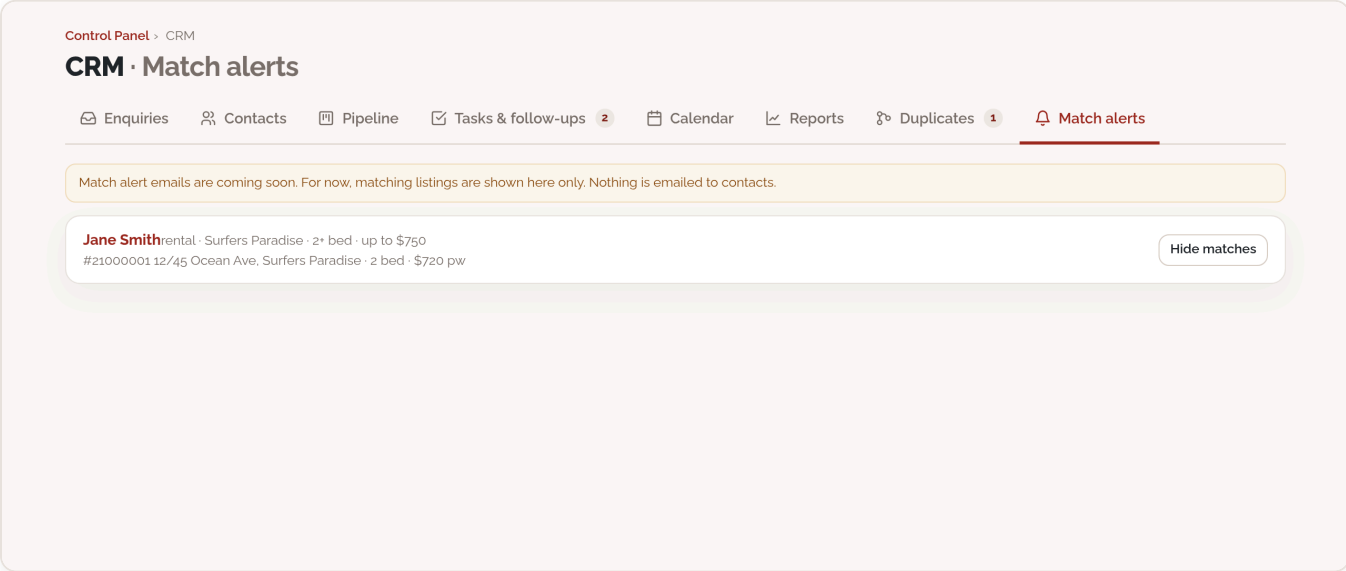
Duplicates lists contacts who share an email address or mobile number, for example someone who enquired on both REA and Domain. **Nothing is merged unless you choose Merge**, and every merge appears under **Merge history** with an **Undo** button.



LIVE UI · DEMO DATA Figure 57. Duplicates: suggested pairs to merge.

14.10 Match alerts

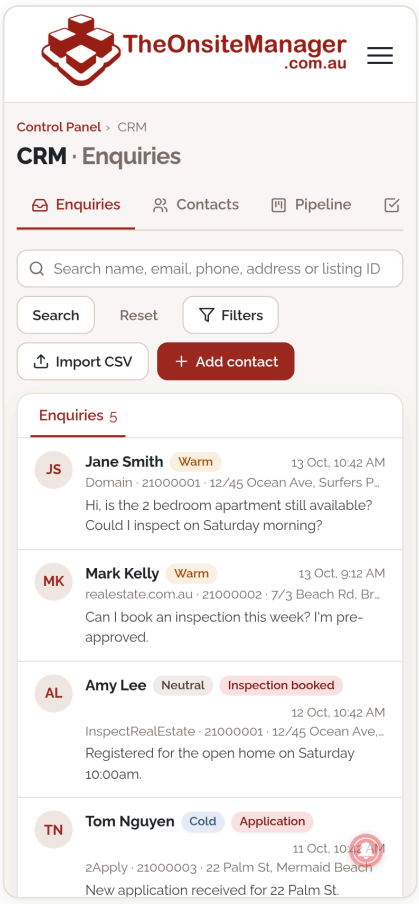
A match alert remembers what a contact is looking for (for example a 2-bedroom rental in Surfers Paradise up to $750 a week). Choose **Show matches** to see which of your current listings fit. **Match alerts are not emailed to contacts.** Matches are shown here only and nothing is emailed to the contact.



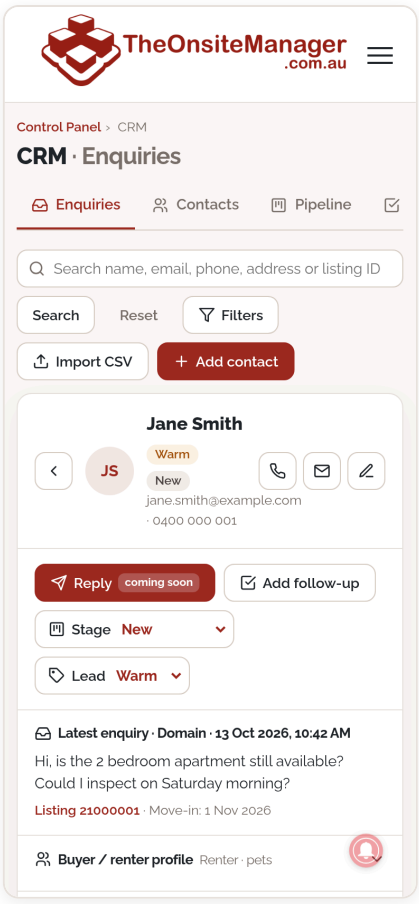
LIVE UI · DEMO DATA Figure 58. Match alerts and the matching listings.

On your phone

The CRM works on a phone. The tab bar scrolls sideways, the list fills the screen, and selecting a person opens their contact card full screen.



LIVE UI · DEMO DATA Figure 59. The Enquiries tab on a phone.

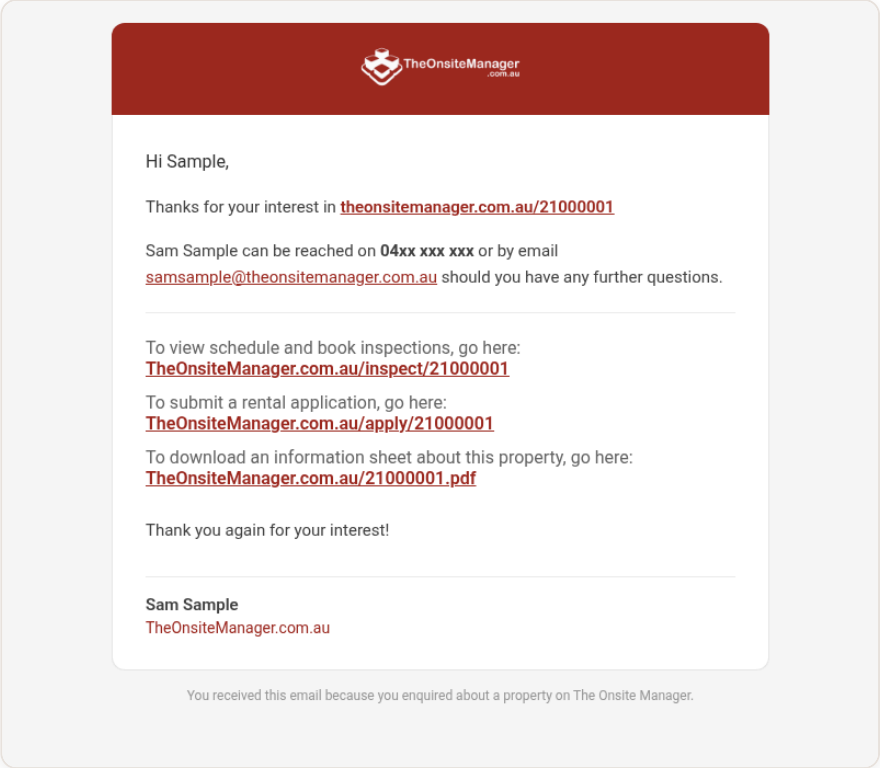


LIVE UI · DEMO DATA Figure 60. A contact card on a phone.

14.11 The automatic reply (autoresponder)

Every enquirer automatically receives a branded email from TheOnsiteManager. It contains:

- your **name**, **phone** and **alias email** (replies go to your alias);
- a link to **view the schedule and book inspections** (`/inspect/<Listing ID>`);
- for rentals, a link to **submit a rental application** (`/apply/<Listing ID>`);
- a link to **download an information sheet** (the PDF brochure).



ILLUSTRATIVE Figure 61. The "Thanks for your enquiry" email, rebuilt from the live template with demo details.

A follow-up email later asks the enquirer for feedback on how you handled the enquiry. This feedback drives the **Top Managers Leaderboard** (3.3).

ℹ️ An improved enquiry notification email is being trialled with a small group of managers (Chapter 26). It is not yet available to everyone.

14.12 Why the autoreply matters

The autoreply is how most applicants find the application link and the inspection booking page. It is also why phone numbers and websites don't belong in your ad wording (Chapter 8): the portal enquiry button gets the enquirer everything they need.

14.13 Exporting enquiries

From the Enquiries view you can export the filtered list (for example all enquiries for one listing) for your own records or for the owner.

14.14 "I'm not receiving enquiries"

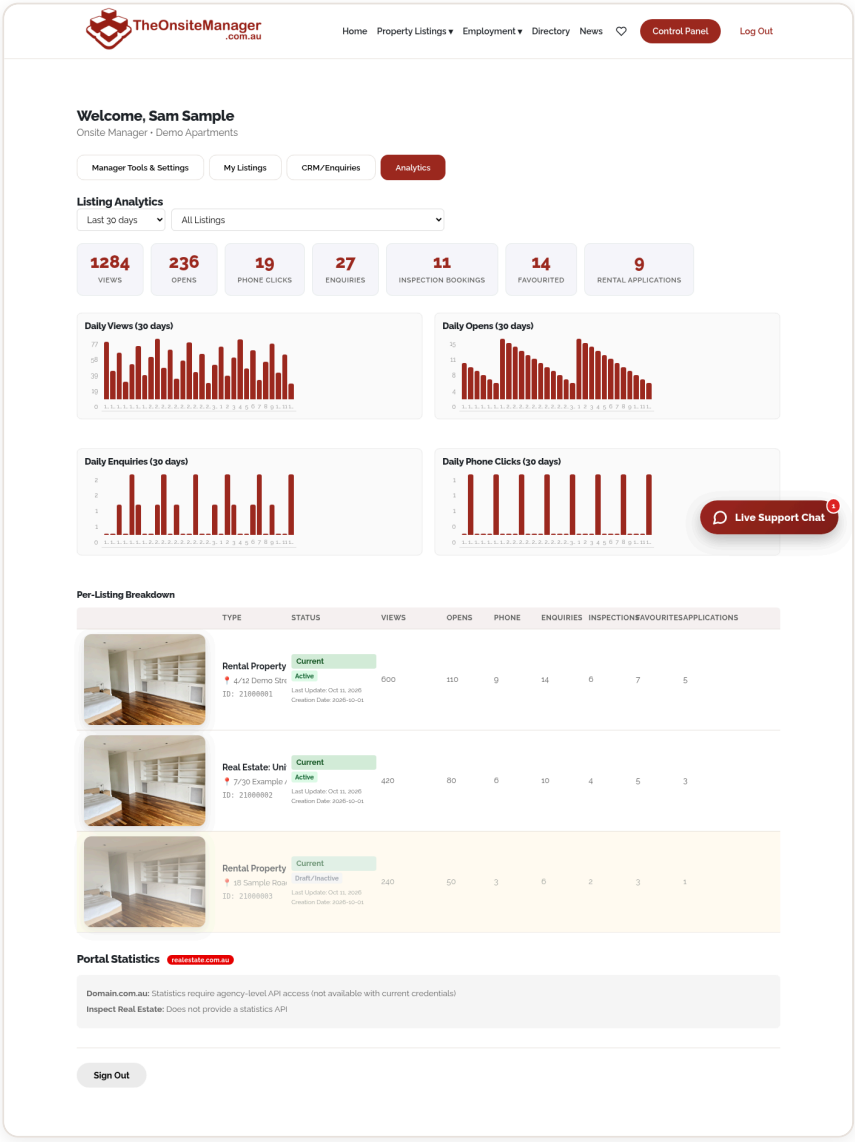
🎧 **From the support desk**
Enquiry emails not arriving is the **7th most common** topic (about 214 tickets). In most cases the enquiries **are** in the CRM, but your email system is filtering the forwarded emails.

1. Open the **CRM** (Enquiries tab). If the enquiries are there, TheOnsiteManager received them. The problem is email delivery.
2. Check your **Junk**, **Spam**, **Other** or **Deleted Items** folders.

3. Add TheOnsiteManager's sending addresses and your alias to your **safe senders** list. Microsoft 365, Outlook.com and Hotmail are the most common culprits.
4. If your email is managed by an IT provider, ask them to set up a **safe senders rule** for TheOnsiteManager emails. We can't change your mailbox's filtering from our end.
5. If the CRM is empty too, check that the listing is live (Active) and on the portal, then contact support with the Listing ID.

> ⚠ Never ask enquirers to contact you off-platform through the ad text (for example "text me on…"). It breaks the REA rules, and you lose the CRM record and the automatic application link.

14.15 Analytics



LIVE UI · DEMO DATA Figure 62. Analytics: totals, daily charts, a per-listing breakdown and portal statistics.

- Choose a period (for example **Last 30 days**) and **All Listings** or a single listing.
- Totals: **Views**, **Opens**, **Phone Clicks**, **Enquiries**, **Inspection Bookings**, **Favourited** and **Rental Applications**.
- Daily charts for views, opens, enquiries and phone clicks.

- A **Per-Listing Breakdown** table.
- **Portal Statistics**: REA statistics where available. Domain and Inspect Real Estate don't provide statistics to us.
- **Owner Performance Report**: opens the printable report for owners (14.16).

Sending an owner report

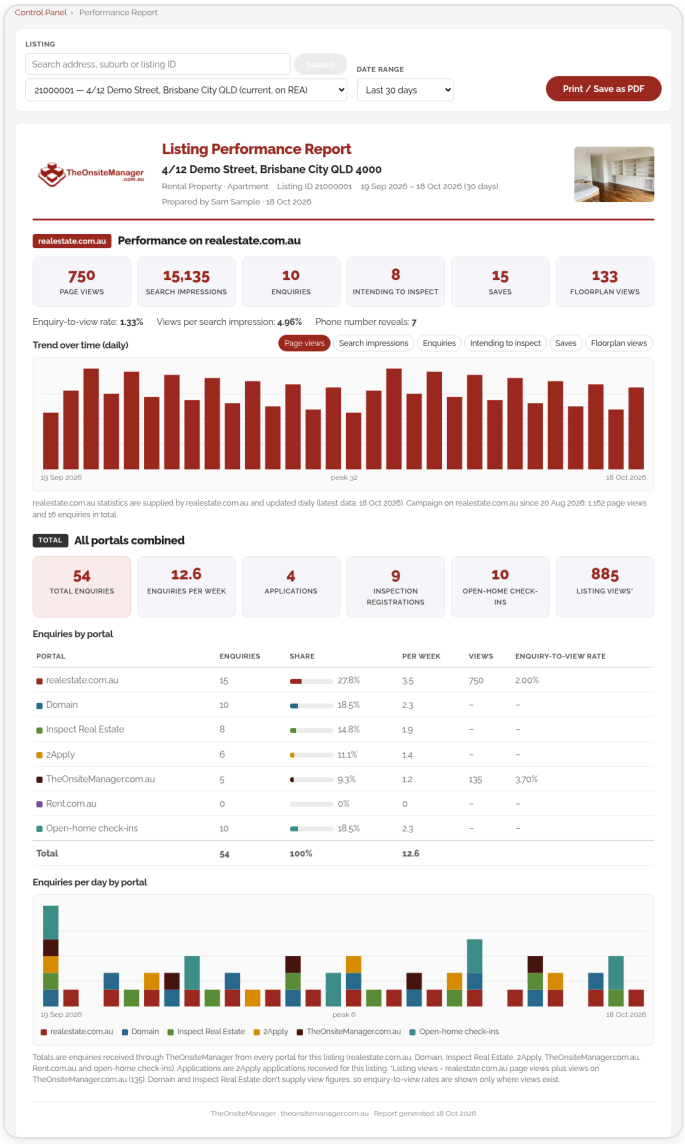
1. On My Listings, choose **ANALYTICS** on the listing (or pick it in the Analytics tab).
2. Choose **Email This Report To Owner**.
3. Notes you marked **Include in vendor report** in the CRM are included.

14.16 The Performance Report (for owners)

The Performance Report shows an owner how their listing is performing: its **realestate.com.au** statistics and the **total** enquiries it has received from every portal, for any dates you choose. It is ready to print or save as a PDF and hand to the owner. It carries the TheOnsiteManager name and your name, and only you can open the reports for your own listings.

Where to find it

- **My Listings**: choose **PERFORMANCE REPORT** on the listing.
- **Analytics tab**: pick the listing, then choose **Open performance report for this listing** under **Owner Performance Report**.
- **CRM**: choose **Performance report** in the tab bar (under **More** on a narrower screen).
- Or go straight to `theonsitemanager.com.au/performance-report`.



LIVE UI · DEMO DATA Figure 63. The Performance Report: the realestate.com.au section, the Total section and enquiries by portal.

Choosing the listing and the dates

1. Choose the listing from the list, or type part of the address, the suburb or the Listing ID and choose **Search**.
2. Choose a **Date range**: Last 7, 30 or 90 days, This month, Last month, Last 6 or 12 months, **Whole campaign** (from when the listing first appeared on realestate.com.au), or **Custom dates**.
3. Choose **Print / Save as PDF**. In the print window choose your printer, or **Save as PDF** to email the file to the owner yourself. The website header, menus and buttons are left off the printout.

The realestate.com.au section

These figures come from realestate.com.au itself and are **updated daily**. The report shows the date of the latest data (usually yesterday). They cover only realestate.com.au.

Figure	What it means
Page views	How many times the listing's own page was opened on realestate.com.au (website and app).

Search impressions	How many times the listing appeared in realestate.com.au search results.
Enquiries	Email enquiries sent through realestate.com.au, as counted by realestate.com.au.
Intending to inspect	People who registered for an inspection, saved an inspection time or said they intend to inspect on realestate.com.au.
Saves	How many times people saved (shortlisted) the listing.
Floorplan views	How many times the floorplan was opened.
Enquiry-to-view rate	Enquiries divided by page views. For example, 3 enquiries from 150 page views is 2%.
Views per search impression	Page views divided by search impressions: how often people who saw the listing in search results opened it.
Trend over time	A daily chart (weekly for ranges longer than about two months). Choose the figure to chart above it.

If the listing has not been on realestate.com.au, the section says so. A listing that has just gone live shows its realestate.com.au figures from the day after realestate.com.au first reports them. Leased, sold and withdrawn listings keep their figures.

The Total section (all portals)

The totals come from the enquiries received **through TheOnsiteManager** for the listing: the same enquiries you see in the CRM.

Figure	What it means
Total enquiries	Every enquiry received for the listing from realestate.com.au, Domain, Inspect Real Estate, 2Apply, TheOnsiteManager.com.au, Rent.com.au and open-home check-ins.
Enquiries per week	Total enquiries divided by the number of weeks in the date range.
Applications	2Apply rental applications received for the listing.
Inspection registrations	People who registered for an inspection through Inspect Real Estate.
Open-home check-ins	People who checked in at an open home with the QR code (Chapter 9).
Listing views	realestate.com.au page views plus views of the listing on TheOnsiteManager.com.au. Domain and Inspect Real Estate don't give us view figures.

Enquiry rates by portal

The **Enquiries by portal** table shows, for each portal, the number of enquiries, its **share** of all enquiries, enquiries **per week** and, where we have view figures (realestate.com.au and TheOnsiteManager.com.au), the **enquiry-to-view rate**. The chart under it shows enquiries per day or week, coloured by portal.

ℹ️ The realestate.com.au **Enquiries** figure is counted by realestate.com.au. The realestate.com.au row in the Total section counts the realestate.com.au enquiries TheOnsiteManager received. The two can differ slightly, for example when someone enquires twice or a phone enquiry isn't emailed.

14.17 Applications in the CRM

The **Applications** tab (formerly VERIFII) lists every rental application on your listings, from **VERIFII** and from **2Apply**. Use the filter at the top to show **All**, **Verifii** (when VERIFII is on for your account) or **2Apply**. Each row shows where it came from, the applicants with their mobile and email, the listing and the date. You only ever see applications on your own listings.

2Apply applications show **Received**, because 2Apply doesn't send status updates. Choose **Open in 2Apply** to see the full application. After 7 days 2Apply's link expires, and the button takes you to the 2Apply AppTracker login instead. Approve or decline 2Apply applicants in 2Apply.
Some older 2Apply applications that aren't linked to a listing don't appear. ERIFII applications work as before, on the contact card and in the Applications list:

- The **listing line** under an application shows the listing number with two buttons: **Generate Lease** opens a Form 18a general tenancy agreement in the Form Manager, filled in from the application and listing (Chapter 27); **Edit Listing** opens the listing in the listing wizard. Move-in date, finance and inspection details are shown on the same line when the applicant gave them.
- Each application has **Approve**, **Reject** and **Refer** buttons. They work exactly like Approve, Decline and Refer in VERIFII (15.9). You see who will be emailed before you confirm.
- **Generate lease** and **Download Privacy Consent** (15.7) are next to them. You can also **Send application to owner** : the preview lists what is hidden from the owner, the owner's response is shown on the application, and you can cancel the owner's link at any time.
- After a decision, **Next steps** offers **Generate lease (Form 18a)** and **Schedule entry condition report**, which adds the inspection to your Tasks and Calendar.

CHAPTER 15

Rental applications with VERIFII

Identity-verified applications, co-tenants, references, status tracking and the application PDF.

In this chapter

- What VERIFII is and how applicants reach it
- The application steps the applicant completes
- Co-tenants (additional applicants)
- Tracking status from My Listings, and opening the full application and PDF
- The emails you receive as applications progress

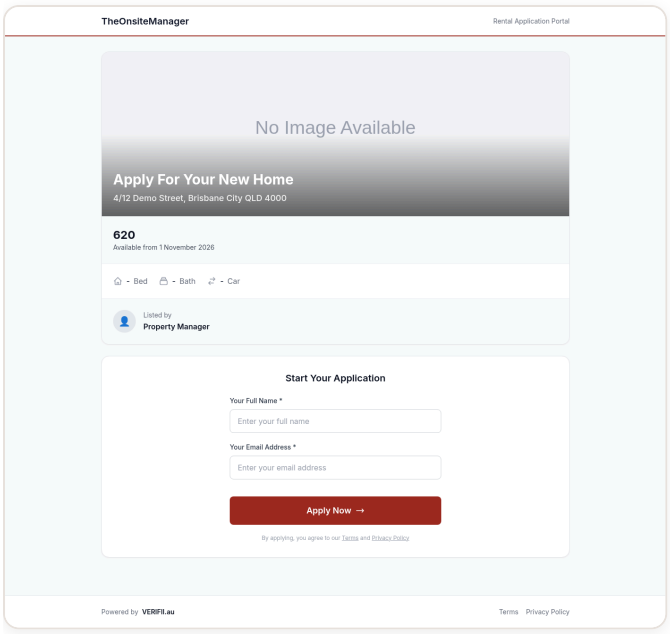
15.1 What is VERIFII?

VERIFII (verifii.au) is the identity-verification and application platform built into TheOnsiteManager. For rentals it replaces 2Apply. Every applicant proves their **email**, **mobile**, **identity** (with a liveness video) and **income**, and references are collected for you. All of it can be seen from your **My Listings** panel.

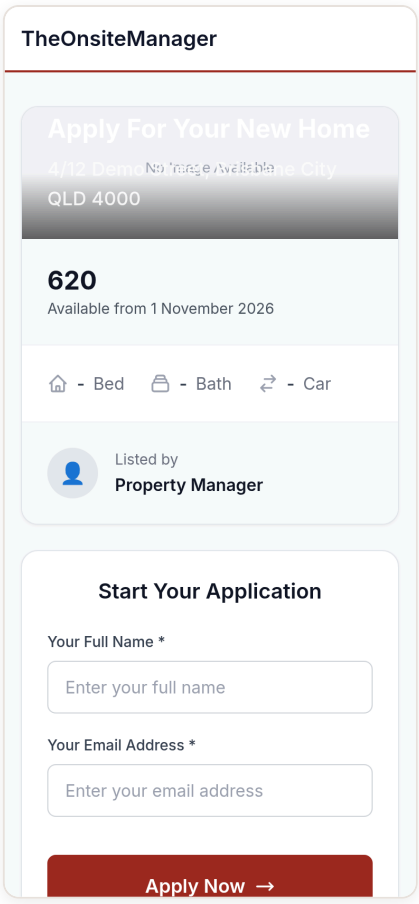
ℹ️ You do **not** need a separate VERIFII password. You always open VERIFII through My Listings (View Status or View in VERIFII), which signs you in securely for that listing. If VERIFII ever shows "invalid credentials", close it and open it again from My Listings.

15.2 How applicants start an application

- The **Apply For This Rental** button on the TheOnsiteManager listing.
- The apply link in the automatic enquiry reply (14.11).
- The application link at the end of the ad text on REA (13.5).
- A link you send them yourself: `theonsitemanager.com.au/apply/<Listing ID>`.



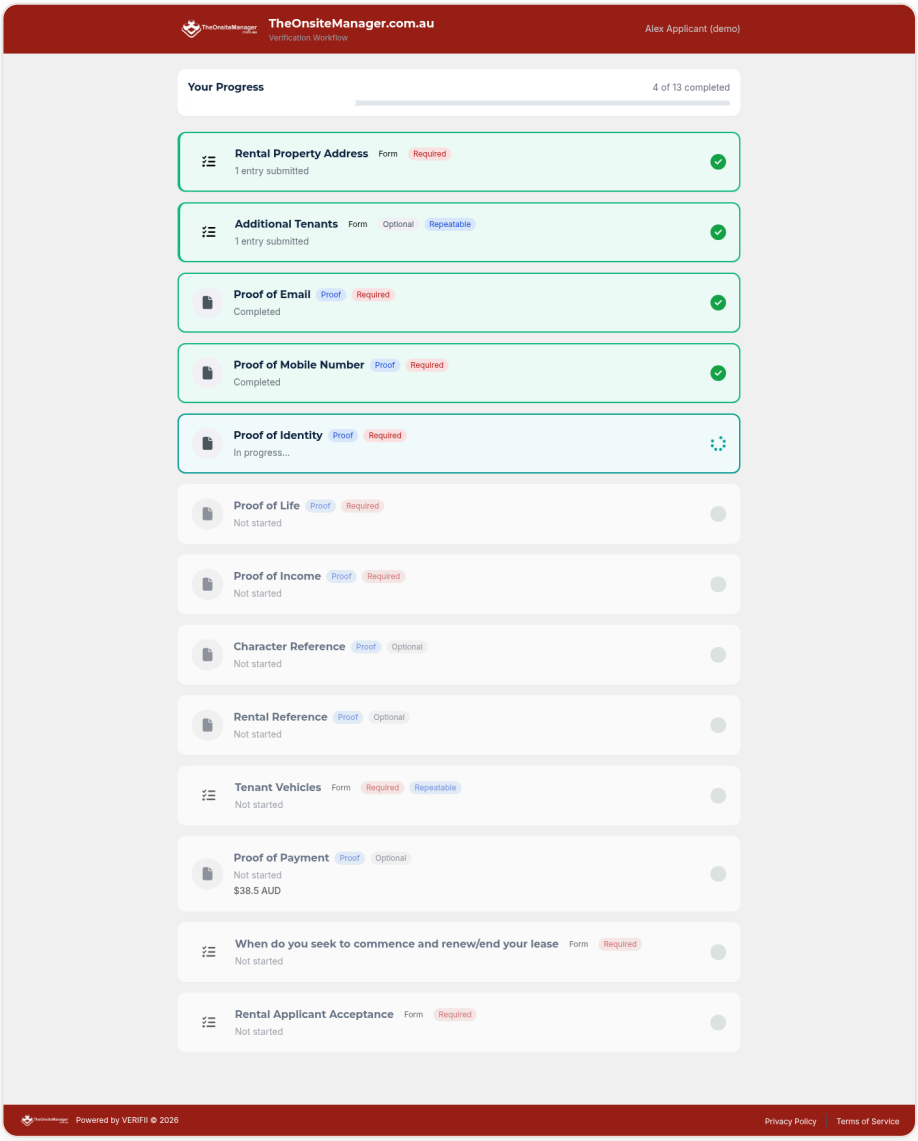
ILLUSTRATIVE Figure 64. The application start page: the property, then the applicant's name and email.



ILLUSTRATIVE Figure 65. The same page on a phone. Most applicants apply on their phone.

The applicant enters their full name and email and chooses **Apply Now**. VERIFII emails them a secure link to their personal application.

15.3 The application steps (Standard Rental Application with Verification)



ILLUSTRATIVE Figure 66. The applicant's progress page: 13 steps, each marked Required or Optional, with progress shown at the top.

#	Step	What the applicant does
1	Rental Property Address	Confirms the property they are applying for.
2	Additional Tenants *(optional, repeatable)*	The **lead applicant only** lists every other adult who will be on the lease (name and email). Each one receives their own email link (15.5).
3	Proof of Email	Enters a code sent to their email.
4	Proof of Mobile Number	Enters a code sent by SMS.
5	Proof of Identity	Photographs a passport, driver licence or ID card.
6	Proof of Life	Records a short liveness video to show they are the person on the ID.
7	Proof of Income	Uploads payslips, bank statements or other income evidence.
8	Character Reference *(optional)*	Gives a referee, who is emailed a reference form.

9	Rental Reference *(optional)*	Gives their previous landlord or agent, who is emailed a reference form (rating, arrears, damage, bond, tenant ledger).
10	Tenant Vehicles *(repeatable)*	Lists vehicles to be kept at the property.
11	Proof of Payment *(optional)*	Pays **$38.50** for a National Tenancy Database background check, if they choose to.
12	Lease term	When they want to start, and for how long.
13	Rental Applicant Acceptance	Declarations: NTD acknowledgement, the AUSTRAC truthfulness warning, and an optional utility-connection opt-in.

15.4 What the applicant pays

The application is free to the applicant. The only charge is the **optional** $38.50 NTD background check in step 11. There is no cost to you as the manager.

15.5 Co-tenants (additional applicants)

Only the **lead applicant** adds co-tenants, in step 2. Each co-tenant receives an email link to a shorter **secondary applicant** application (email, identity and income). Co-tenants should **not** start a separate application from the listing. An unlinked application is treated as a separate application.

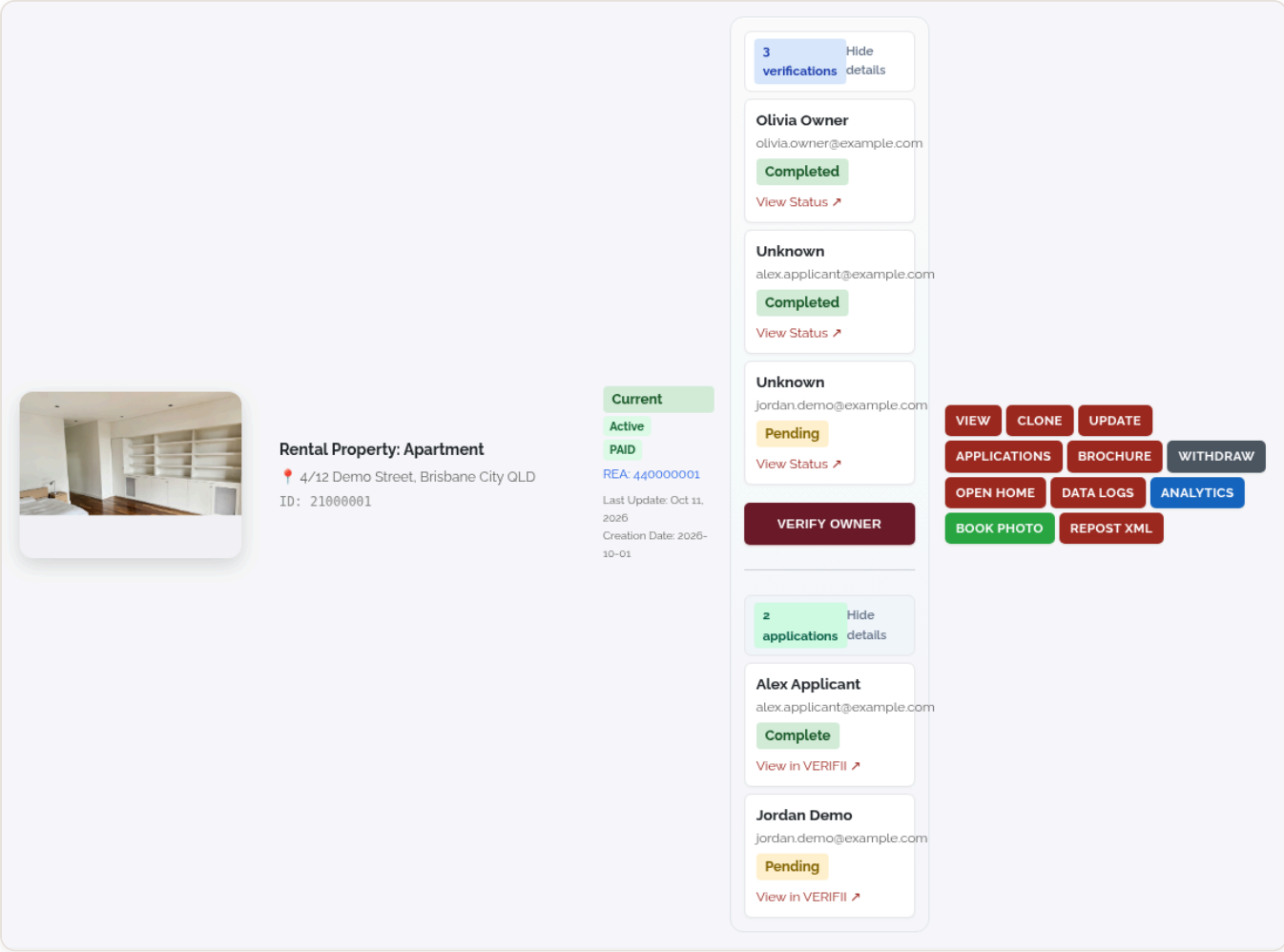
In the application's details in VERIFII you can see each co-tenant's status:

Status	Meaning and action
Invited - application completed	Done.
Invited - waiting for them to complete	Remind them. You can **resend** the invite.
Invited - link expired, not completed	Resend. The expired link is extended by **30 days**.
Co-tenant named, not invited (no email)	Ask the lead applicant for the co-tenant's email.
Co-tenant named, not invited (email not valid)	Ask for a correct email.
Co-tenant email given without a name, not invited	Ask for the co-tenant's name.
Co-tenant named, not invited (lead applicant's own email was entered)	The lead typed their own email. Ask for the co-tenant's own email.



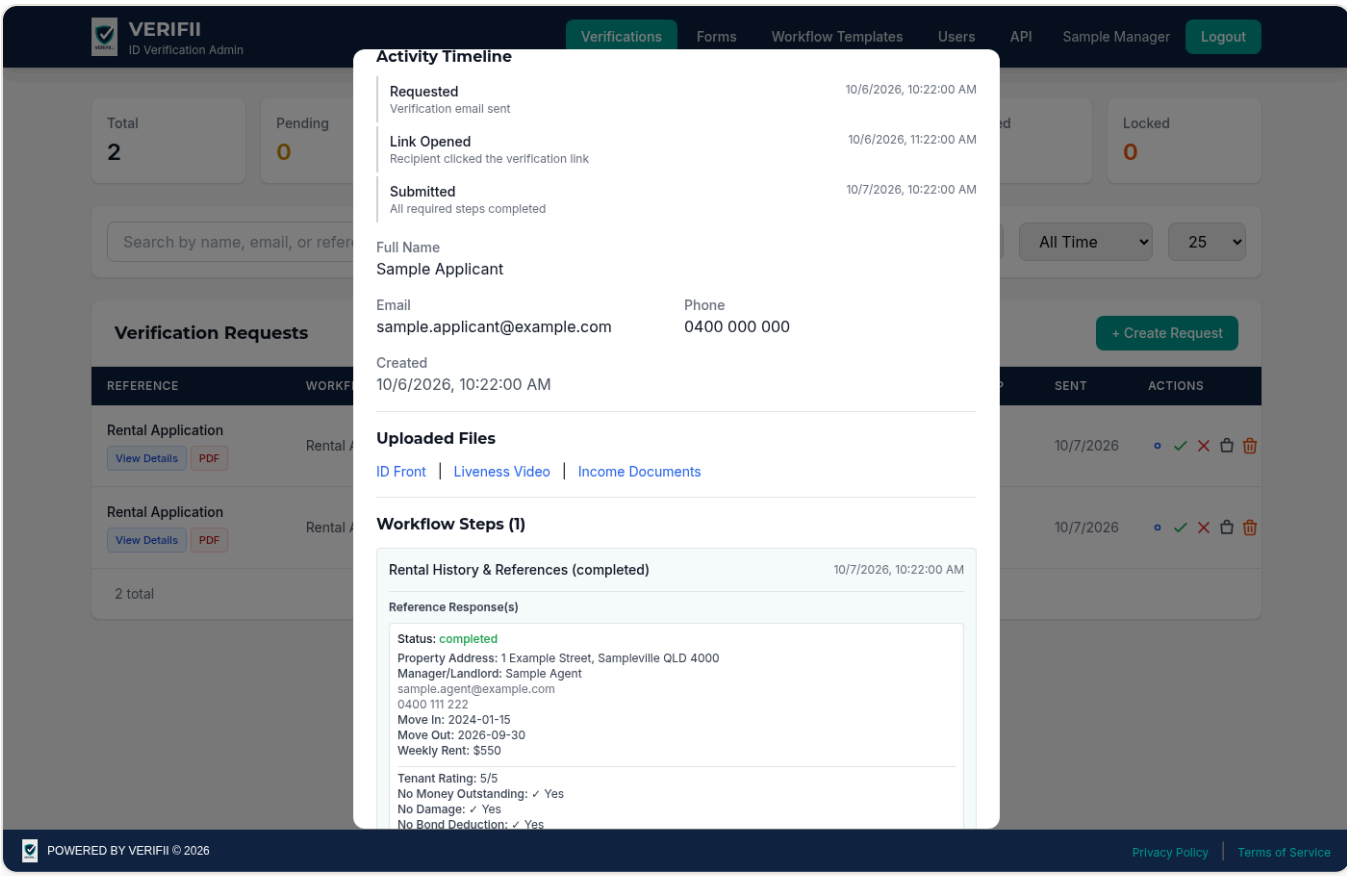
Resends are limited to one every couple of minutes. If you see "An invite was sent to this co-tenant in the last few minutes", wait and try again.

15.6 Tracking applications from My Listings

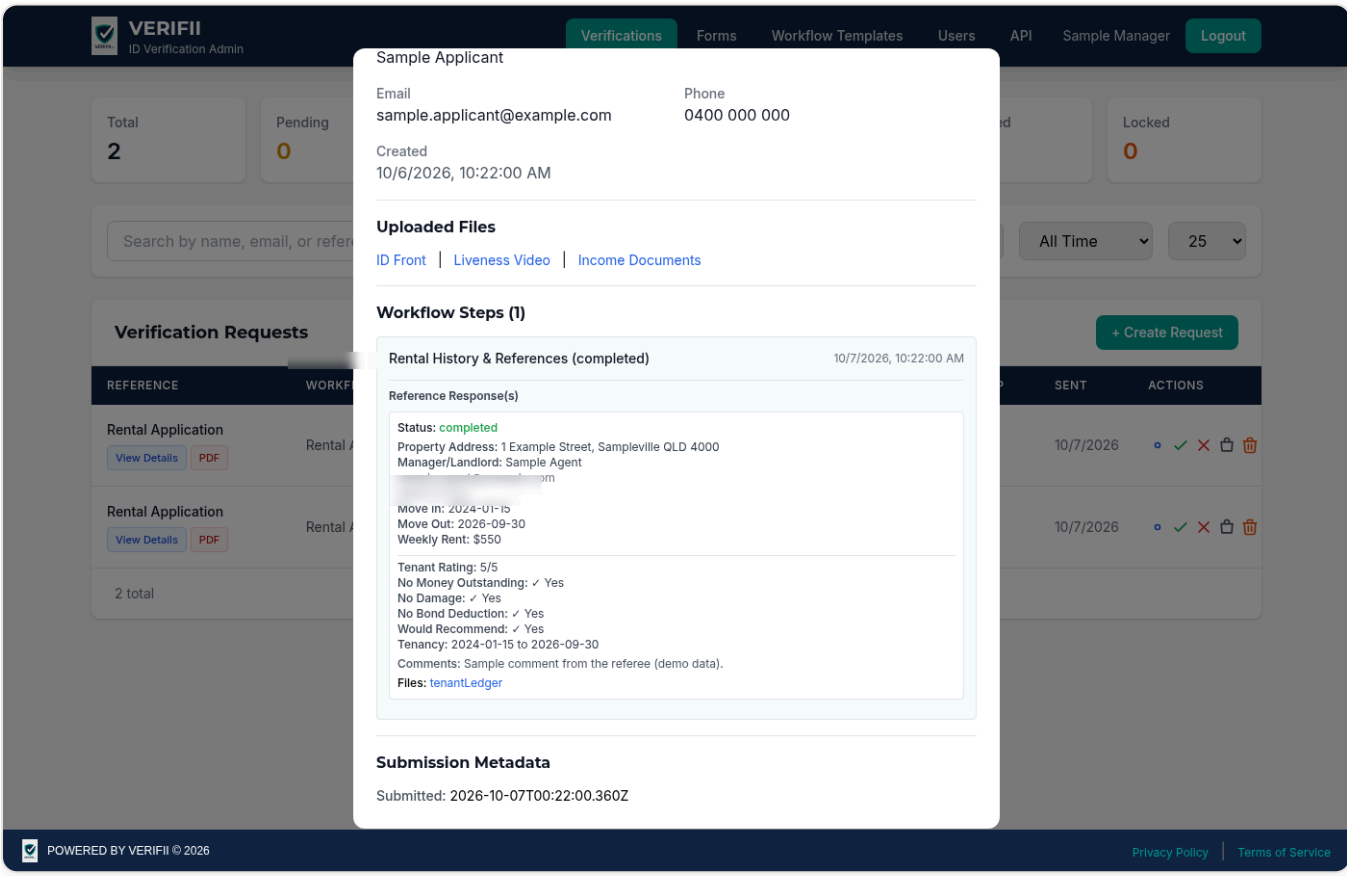


LIVE UI · DEMO DATA Figure 67. A rental's VERIFII & Applications column, expanded: owner verification, then "2 applications" with each applicant's status and a View in VERIFII link.

1. On **My Listings**, find the rental. Choose **APPLICATIONS**, or **Show details** in the VERIFII & Applications column.
2. The panel lists **verifications** (owner) and **"N applications"**. Choose **Show details** on the applications box.
3. Each applicant shows their name, email and status: **Pending** (in progress) or **Complete**.
4. Choose **View Status ↗** or **View in VERIFII ↗**. Both open the same VERIFII window for that application.



LIVE UI · DEMO DATA Figure 68. The VERIFII details window: activity timeline, applicant details and Uploaded Files (ID, liveness video and income documents).



LIVE UI · DEMO DATA Figure 69. Further down: Workflow Steps and Reference Response(s), including the referee's answers and files such as the tenant ledger.

What you'll find in the details window

- **Activity Timeline**: requested, link opened, submitted.
- **Applicant details**: name, email and phone.
- **Uploaded Files**: the applicant's own uploads (ID front, liveness video, income documents).
- **Workflow Steps**: each form step, with **Reference Response(s)**. Referee files (for example the **tenantLedger**) are listed here, not under Uploaded Files.

15.7 Downloading the application PDF

1. My Listings → **APPLICATIONS** → **Show details** on "N applications".
2. Choose **View in VERIFII ↗**.
3. In the VERIFII list, find the application and choose the red **PDF** button.
4. Save the PDF to the tenancy file, or send it to the owner.

Print RTA Application (Form 22) and Download Privacy Consent

In the VERIFII list, each application group also has two green buttons:

- **Print RTA Application**: the official RTA Form 22 rental application, filled in for every applicant in the group, ready to print or save.
- **Download Privacy Consent**: a one-page signed privacy consent for each applicant (one PDF, one page per applicant). Send it to a referee who asks for proof that the applicant agreed to the reference check.

The same **Download Privacy Consent** button is on each application in the CRM (14.17).

> ⚠️ Application PDFs contain identity documents and personal information. Store them securely, send them only to the owner (or as the law requires), and never forward them to other agencies or third parties. See the Privacy Act obligations in the Terms (23.5).

15.8 Emails you receive

As each application progresses, you receive up to three emails (each sent once per application), sent to your alias and forwarded to you:

Email	Sent when
Application 60% complete	The applicant has finished at least 60% of the steps. You can review what has been submitted so far.
Application fully submitted	All required steps are complete. The application is ready for your review.
All references completed	Every referee has responded (only for applications with references).

Reference request emails sent to referees now include a link to that applicant's signed privacy consent (PDF). The link only shows that applicant's page and stops working when the reference request closes or expires.

Each email has a **view-only** link to the application. To download the PDF, open it from My Listings (15.7).

15.9 Approving, declining or referring an applicant

Discuss the applicants with the owner first. Then record the decision in VERIFII (or from the application in the CRM, 14.17):

Button	What happens
Approve	The application is marked approved. Every other applicant for the same listing is marked declined and told that their application was unsuccessful. You see who will be notified before you confirm.
Decline (shown as **Reject** in the CRM)	This application is marked declined, and each applicant in it receives an email titled "Your application for [address]": "Unfortunately your application was not successful this time. Your verified application stays on file, so applying for another property is quick." The email also suggests similar rentals.
Refer	Choose another of your current listings. VERIFII copies the application across and emails the lead applicant (or all applicants) a "Review and apply" link. Nothing is submitted until they review and submit it. Their original application is unchanged.

Every button asks you to confirm and shows exactly who will be emailed. Once you have approved an applicant, prepare the lease (RTA Form 18a) in The Form Manager, not RealWorks:

1. Open The Form Manager (27.3), choose **New document** and **RTA Form 18a**, then fill it from the VERIFII application or your listing (27.5). Or choose **Generate Lease** on the application in the CRM (14.17).
2. Check every page, save it and send it for free electronic signing (27.8).
3. From the saved lease, choose **Bond lodgement form** to make the RTA Form 2 without retyping (27.9).
4. Add the tenants to your CRM from the lease (27.12), then mark the listing **Leased** (10.6).
5. Later, fill entry notices (Form 9), notices to remedy breach (Form 11), notices to leave (Form 12), notices of intention to leave (Form 13) and rent increase notices straight from the saved lease (27.13).

The Form Manager is free on LITE and FULL plans. AML/CTF checks are not needed for leases.

15.10 FAQ

Q. The APPLICATIONS button takes me to a "verification" page. Is that right?

Yes. Applications, owner checks and AML checks all live in VERIFII, together in one place.

Q. An applicant says they applied through 2Apply.

2Apply is no longer used for TheOnsiteManager listings. Some older listings may still receive 2Apply applications through Inspect Real Estate. Ask the applicant to complete the VERIFII application too (13.5).

Q. Can I see an application before it's finished?

Yes. View Status shows everything submitted so far, and you get the 60% email.

Q. A co-tenant never got their email.

Check their status (15.5). If it says "waiting" or "expired", resend. If it says "not invited", ask the lead applicant for the correct details.

CHAPTER 16

Owning the application process

The system collects applications. You turn them into a signed lease.

In this chapter

- Your role compared with the system's role
- A day-by-day process from first enquiry to signed lease
- Chasing incomplete applications and co-tenants
- Talking to the owner and handling privacy

16.1 Why "owning" it matters

Support tickets show that many delays happen because everyone waits for the system to "tell" them something. The applicant thinks they're finished. The co-tenant never opened their email. The referee hasn't replied. The manager hasn't looked at My Listings. VERIFII automates the collection and the checks, but **you** run the process: you set expectations, chase, review, recommend to the owner, and close.

VERIFII does	You do
Sends the application link to every enquirer	Personally invite good prospects after inspections
Verifies email, mobile, ID, liveness and income	Review the evidence and judge affordability and fit
Emails referees and records their answers	Chase referees who don't respond, and call when needed
Invites co-tenants and shows their status	Make sure every adult on the lease completes their part
Emails you at 60%, submitted and references complete	Act on those emails the same day
Produces the PDF	Present a recommendation to the owner and get instructions
–	Prepare the lease in The Form Manager (15.9) and mark the listing Leased

16.2 The process, step by step

Before the inspection

1. Publish with good photos, accurate wording and inspection times (Chapters 5–9).
2. Check that enquiries are reaching you (CRM, 14.14). Rate new enquirers Warm, Neutral or Cold with the Lead dropdown (14.5).
3. Reply personally to Warm enquirers and confirm the inspection time.

At the inspection

1. Display the **OPEN HOME QR code** (9.4) so every visitor is registered.

2. Tell interested visitors: *"Apply online through the link in your email or on our listing. It takes about 15 minutes on your phone. Please add everyone who'll be on the lease in the Additional Tenants step, so they get their own link."*
3. Explain what they'll need: photo ID, payslips or bank statements, and contact details for references.

Same day

1. Open the CRM, Enquiries tab → Filters → **Open home attendee**. Add a note for each person and rate them.
2. Send the application link (`theonsitemanager.com.au/apply/<Listing ID>`) to anyone interested who hasn't started.

Daily, until leased

1. Open **My Listings** → **APPLICATIONS**. Look at every **Pending** application.
2. Open **View Status**. Which steps are incomplete? Are co-tenants invited and complete? Are references outstanding?
3. **Chase** by phone or SMS: the applicant for missing steps, the lead applicant for co-tenant details, the referees for responses.
4. Resend co-tenant invites that are waiting or expired (15.5).

When an application is complete

1. Review the ID, liveness, income and references. Check that the rent is affordable on the evidence provided.
2. Download the **PDF** (15.7).
3. Send the owner a short recommendation with the PDF. Compare the top applicants if there are several.
4. Get the owner's instruction **in writing**.

Closing

1. Tell the successful applicant, and politely tell the unsuccessful ones.
2. Prepare and sign the lease in **The Form Manager** (15.9, Chapter 27).
3. Mark the listing **Leased** and Publish (10.6), the same day.
4. Offer the tenant **Tenant Connections** for utilities (3.3).

16.3 Scripts that work

Applicant stalled at Identity or Proof of Life

"Hi [name], thanks for starting your application for [address]. It looks like the ID step isn't finished yet. It works best on your phone in good light: hold the ID flat, then record the short video. Once that's done I can put your application to the owner."

Co-tenant not invited

"Hi [lead], your application is looking good. I can see you named [co-tenant] but the email didn't go through. Could you send me their correct email, or re-add them in the Additional Tenants step? Everyone on the lease needs to complete their own part."

Referee not responding

Call the referee. Explain that a reference request was emailed from VERIFII on behalf of TheOnsiteManager, and ask them to check their junk folder. If they would rather speak, record what they say in the CRM as a note.

16.4 Do's and don'ts

✅ Do

- Check My Listings → APPLICATIONS every day while advertising
- Act on the 60% and submitted emails the same day
- Keep the owner informed in writing
- Treat every applicant the same way
- Store PDFs securely

❌ Don't

- Accept paper or emailed applications that skip identity checks
- Ask applicants to email ID documents to you
- Share applications with other agencies
- Discriminate (family status, race, age and so on)
- Leave the listing "Current" once leased

16.5 Application checklist

- [ ] All adults on the lease have applied (lead plus each co-tenant completed)
- [ ] Email and mobile verified; ID and liveness complete for each applicant
- [ ] Income evidence supports the rent
- [ ] Rental and character references received, or followed up by phone
- [ ] NTD check result reviewed (if the applicant paid for it)
- [ ] PDF saved and sent to the owner with your recommendation
- [ ] Owner's written instruction received
- [ ] Lease prepared in The Form Manager and signed
- [ ] Listing marked Leased and published

🎧 **From the support desk**

VERIFII applications are the **4th most common** topic (about 346 tickets): finding applications, applicants who can't finish, co-tenant links, and the PDF. Nearly all of them are answered by 15.5–15.7 and the daily routine in 16.2.

CHAPTER 17

AML/CTF: why and when you verify

Customer due diligence for owners, vendors and purchasers: the law, your obligations, and how TheOnsiteManager helps.

In this chapter

- What AML/CTF and CDD mean for onsite managers
- When verification is mandatory, and when it is strongly recommended
- Who is verified, and what it costs
- Where verifications appear

17.1 The basics

Australia's **Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth)** (the AML/CTF Act) requires "reporting entities" to know who their customers are. Under the 2024 reforms ("Tranche 2"), real estate agencies are now regulated by **AUSTRAC**. As a reporting entity, TheOnsiteManager must carry out **customer due diligence (CDD)**, meaning it must identify and verify customers, **before** providing certain services, and keep records.

TheOnsiteManager uses **VERIFII** to do this. The person being verified receives an email link and completes the checks on their phone. You see the result in My Listings.

17.2 When you must verify

Situation	Who is verified	Requirement in TheOnsiteManager
Residential sale	Every **vendor** (owner selling)	**Mandatory.** A sale can't be published until vendor details are entered and the request is sent (18.3).
Sale: buyer	Every **purchaser**	Start it with **VERIFY PURCHASER** once you have a buyer (Chapter 19).
Management rights / hospitality sale	Vendor and purchaser	Use the VERIFY VENDOR and VERIFY PURCHASER buttons on My Listings.
Rental	Every **owner** (landlord)	**Strongly recommended.** The wizard warns you if no owner details are given, and you can choose "Continue Anyway". Support's guidance is that CDD on owners is a legal obligation for the agent, and that the responsibility is yours if you skip it.
UAE listings	–	Optional (on-site-only listings).

⚠️ **Penalties**

The forms carry this warning: *"It is a serious federal offence to provide false or misleading information to an AUSTRAC Reporting Entity! Consequences include up to 10 years imprisonment, significant financial penalties… (Section 136 of the AML/CTF Act 2006)."* Never fill in a verification on someone else's behalf, and never enter details you know to be wrong.

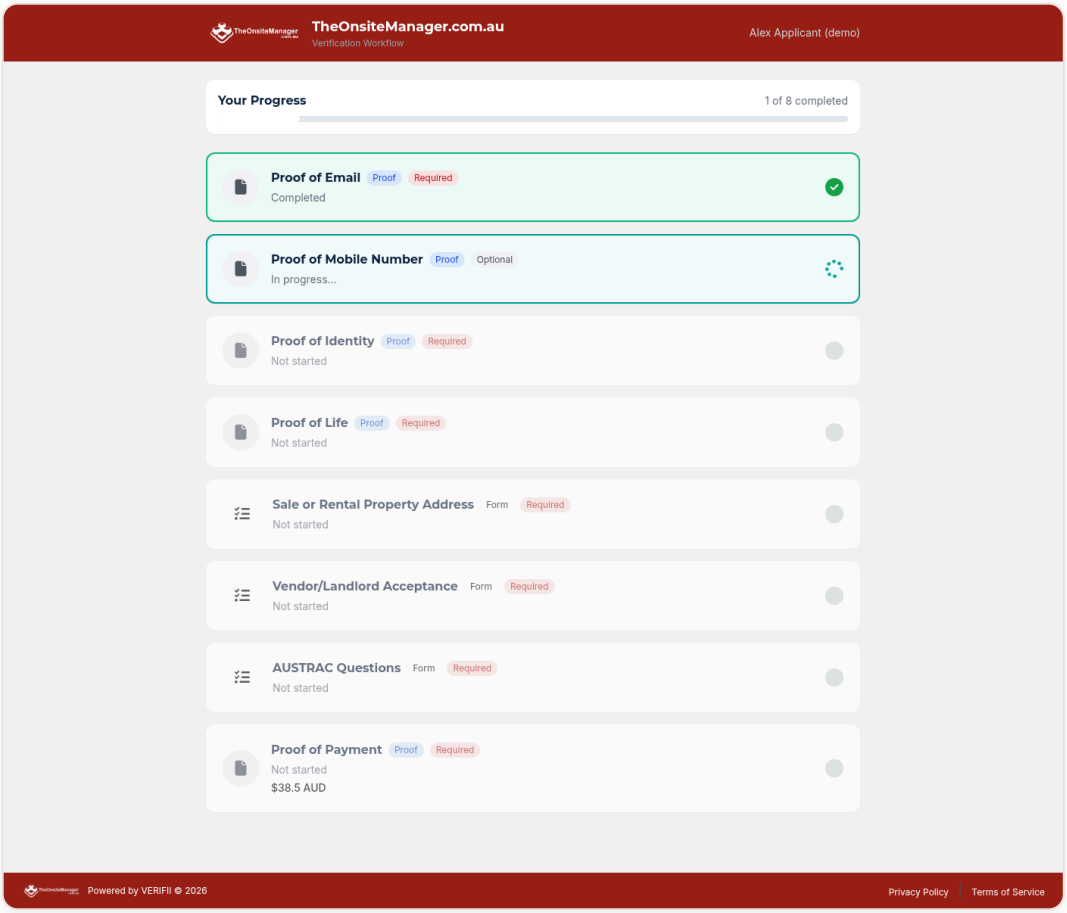
From the support desk

"If the owner won't verify, will my rental be switched off?" No. Rental listings keep working whether or not CDD has been done. But skipping CDD may breach your obligations, and that is your responsibility. For sales, there is no way around it. Support also can't change details such as a **sold price** on a sale that has no AML verification.

17.3 What the person being verified does

The owner, vendor or purchaser receives an email from VERIFII and completes, on their phone:

1. **Proof of Email** (code), and optionally **Proof of Mobile Number**. Mobile is optional, which helps overseas owners without an Australian number.
2. **Proof of Identity**: passport, driver licence or ID card.
3. **Proof of Life**: a short liveness video.
4. **Property address** (owners and vendors).
5. **AUSTRAC Questions**: Australian citizenship, any other citizenships, and whether they intend to receive payments in cash, cryptocurrency or barter.
6. **Acceptance**: a declaration that the information is true, including the s136 warning.
7. **Payment** for verification analysis and storage (17.4).



ILLUSTRATIVE Figure 70. An owner's VERIFII progress page (Owner/Vendor Verification).

17.4 What it costs

Verification	Fee (October 2026, inc GST)
Owner / vendor: verify only	$38.50
Owner / vendor: with title search (first verification of a property)	$88.50 ($38.50 verification + $50 title search)
Purchaser	$38.50

The fee is paid within VERIFII as the last step. It covers the verification, the title search where needed, and secure record storage as required by the regulations. It isn't a TheOnsiteManager mark-up.

17.5 Entity types and beneficial owners

When you send a request, you choose what the owner "is":

- **Individual**: verify each person on the title.
- **Trust (Beneficiary)**: enter the trust's name, and verify the beneficiaries.
- **Company (Beneficial Shareholder >25%)**: enter the company name, and verify each person who owns more than 25%.

You can add up to **five** parties in one request.

17.6 Where to see verifications

- **My Listings** → **VERIFII & Applications** column: each verification for that listing, with its status and **View Status ↗** (18.5).
- **Manager Tools** → **Review AML&CFT Verifications**: your VERIFII dashboard across all listings.

💡 If "Review AML&CFT Verifications" shows an error such as "Token not found", let it finish loading, or simply work from **My Listings**, which always opens the right listing securely.

🎧 **From the support desk**

AML owner and vendor verification accounts for about **125 tickets**: owners questioning the fee, overseas owners without an Australian mobile (mobile is optional), finding the result, and "does this stop my listing?" (17.2).

CHAPTER 18

AML: verifying owners and vendors

Step by step: sending, tracking and resolving owner and vendor verifications.

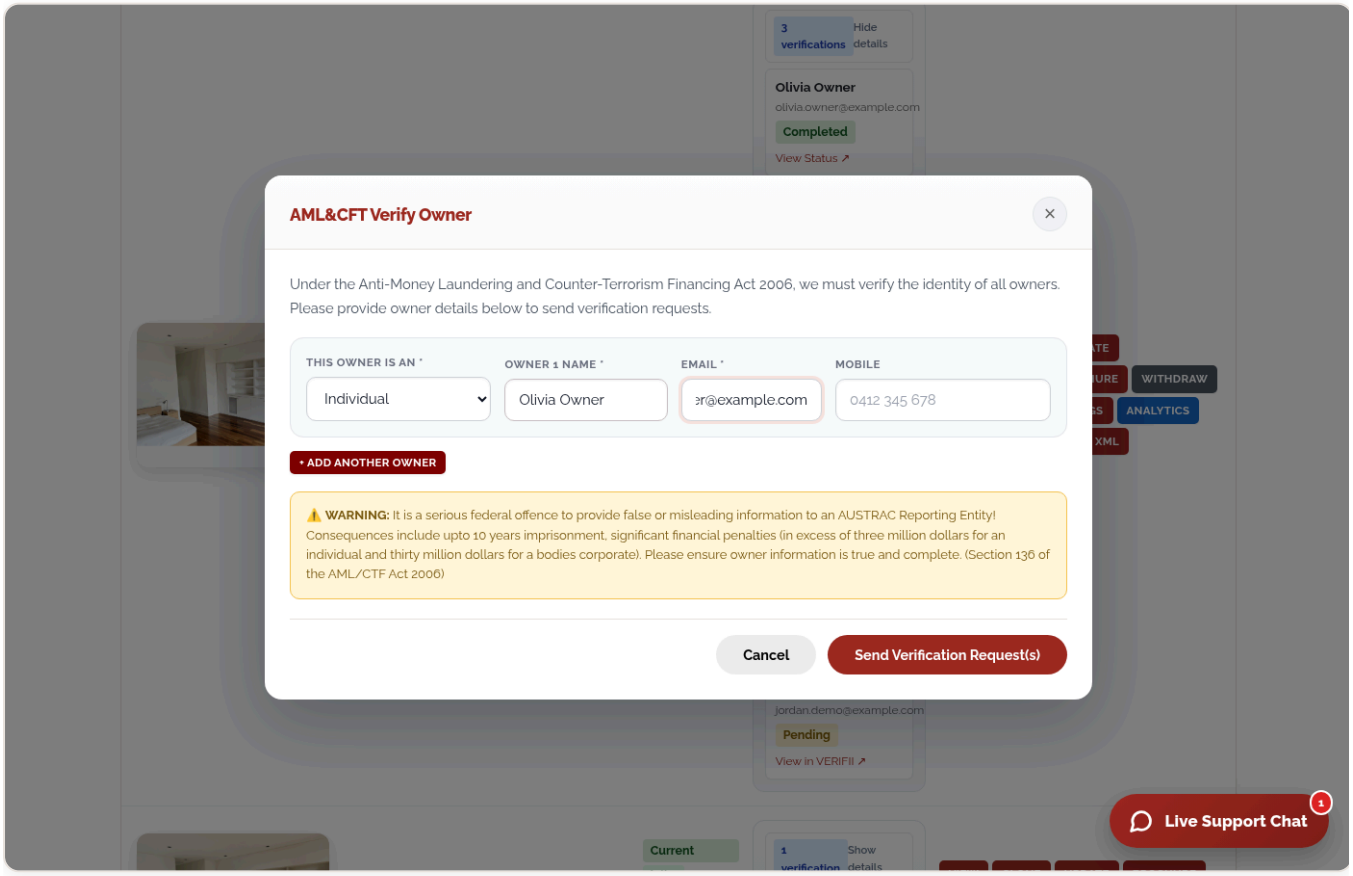
In this chapter

- Sending an owner verification for a rental
- Sending a vendor verification for a sale (from the wizard or My Listings)
- Tracking status and opening the result
- Common owner questions

18.1 Before you send

- [ ] You have each owner's **full legal name** and **personal email** (mobile optional).
- [ ] You know whether the owner is an individual, a trust or a company.
- [ ] You have told the owner to expect an email from VERIFII, that it takes about 10 minutes on a phone, and what the fee is.

18.2 Rental owner: from My Listings



LIVE UI · DEMO DATA Figure 71. VERIFY OWNER: choose the entity type, then enter the owner's name, email and (optional) mobile.

1. On **My Listings**, find the rental and choose **VERIFY OWNER** in the VERIFII & Applications column.
2. In **AML&CFT Verify Owner**, choose **This owner is an**: Individual, Trust (Beneficiary) or Company (Beneficial Shareholder >25%).
3. For a trust or company, enter the **entity name**.
4. Enter **Owner 1 Name***, **Email*** and, optionally, **Mobile**.
5. For more owners, choose **+ ADD ANOTHER OWNER** (up to 5).
6. Read the AUSTRAC warning, then choose **Send Verification Request(s)**.
7. Each owner receives their own email from VERIFII. The verification appears in the listing's VERIFII column as **Pending**.

18.3 Owner or vendor: from the listing wizard

The **Review** step of a rental or sale has an **AML/CTF Compliance** section:

1. Enter **Owner/Vendor 1 Name***, **Email*** and **Mobile**. Use **+ Add Another Owner/Vendor** for more.
2. Choose **Send Verification Requests**. A ✅ "Verification Requests Sent" message confirms it, and the request is listed with its status.
3. Continue to Publish.

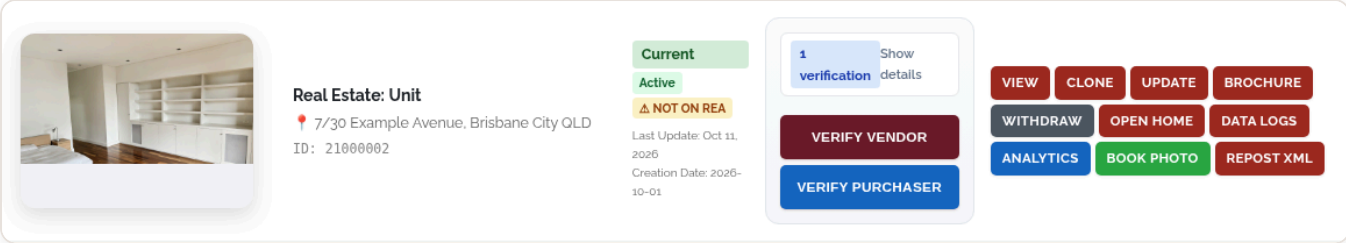
> ⚠️ **Sales are blocked without vendor details**
> If you choose Publish on a residential sale without vendor details, you'll see "Important Notice… Please go back and complete the CDD before proceeding". Only **Go Back** is offered (see 6.2). For rentals, the notice offers **Continue Anyway**.

18.4 Vendor verification for an existing sale listing

On My Listings, choose **VERIFY VENDOR** on the sale (or management rights or hospitality) listing and follow the same steps as 18.2.

18.5 Tracking status

1. On My Listings, choose **Show details** (or **CHECK FOR VERIFICATIONS**) on the verifications box.
2. Each person shows their name, email and status: **Pending** (sent or in progress) or **Completed**.
3. Choose **View Status ↗** to open the verification in VERIFII: the timeline, the ID, the liveness video, the AUSTRAC answers and (where applicable) the title search.



LIVE UI · DEMO DATA Figure 72. A sale listing with a vendor verification in progress, plus the VERIFY VENDOR and VERIFY PURCHASER buttons.

18.6 Chasing an owner

- Ask the owner to search their inbox and junk folder for the VERIFII email.
- Explain that it works best on a phone with good light, and that the liveness video takes a few seconds.
- Owners overseas can skip the mobile step. It is optional.
- If the email address was wrong, send a new request with the correct address.

18.7 Owner FAQ

Q. "Why do I have to do this? I've owned this property for years."

The agency must verify everyone it acts for under the AML/CTF Act, including existing clients, before providing certain services. It protects owners against identity fraud, such as someone pretending to be the owner to sell or rent out their property.

Q. "Why does it cost $88.50?"

$38.50 is for the verification and secure storage. $50 is the title search to confirm ownership, which is needed only once, on the first vendor verification for the property.

Q. "I don't have an Australian mobile."

The mobile step is optional. Email, ID and liveness are required.

Q. "Do I need to do it again if we relist?"

Ask support. Whether an earlier verification can be relied on depends on how recent it is and whether anything has changed.

CHAPTER 19

AML: verifying purchasers

Verify every buyer before the sale proceeds.

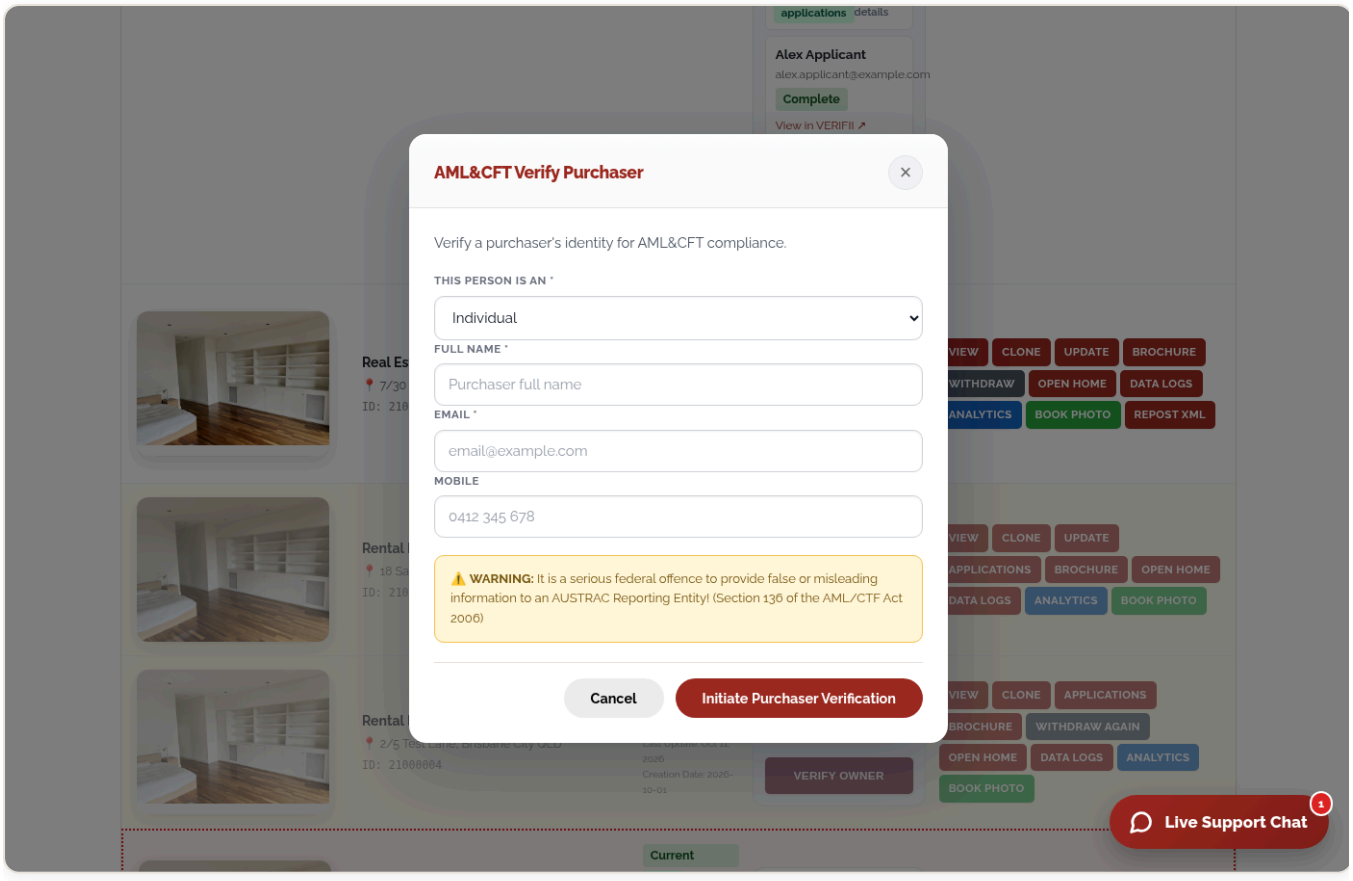
In this chapter

- When to start a purchaser verification
- Sending it from My Listings
- What the purchaser does, and tracking the result

19.1 When to verify a purchaser

As soon as you have a buyer, at the latest when an offer is accepted and before contracts are exchanged, start a purchaser verification for **every** buyer (each individual, or each beneficial owner of a trust or company).

19.2 Sending a purchaser verification

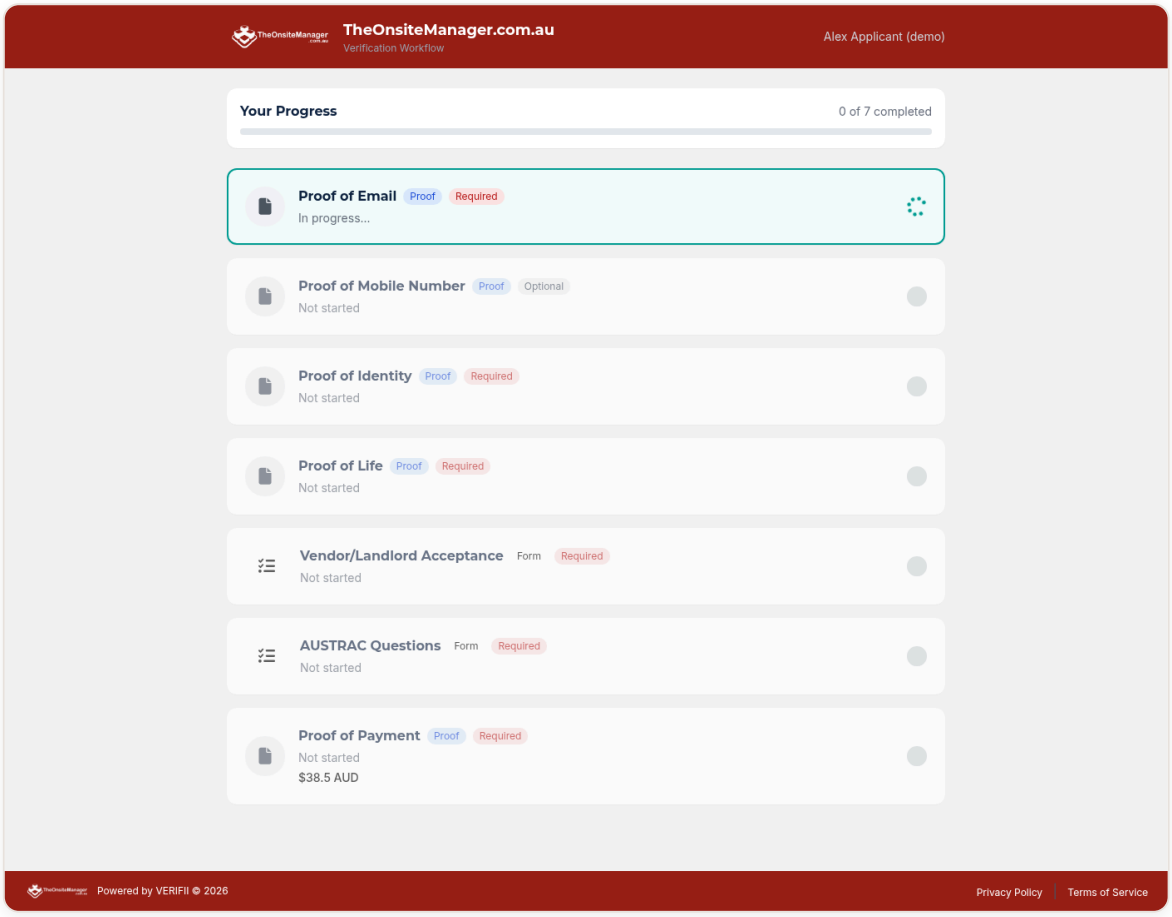


LIVE UI · DEMO DATA Figure 73. VERIFY PURCHASER: the same layout as the owner form, ending with "Initiate Purchaser Verification".

1. On **My Listings**, find the sale (or management rights or hospitality) listing.
2. Choose **VERIFY PURCHASER** in the VERIFII & Applications column.

3. Choose the entity type: Individual, Trust (Beneficiary) or Company (Beneficial Shareholder >25%). Enter the entity name if needed.
4. Enter **Purchaser 1 Name***, **Email*** and, optionally, **Mobile**. Add more purchasers if needed (up to 5).
5. Read the AUSTRAC warning and choose **Initiate Purchaser Verification**.

19.3 What the purchaser does



ILLUSTRATIVE Figure 74. A purchaser's VERIFII progress page.

The purchaser completes: Proof of Email, Proof of Mobile (optional), Proof of Identity, Proof of Life, an acceptance declaration, the AUSTRAC questions (citizenship, other citizenships, cash/crypto/barter), and the **$38.50** verification fee.

19.4 Tracking and records

- The purchaser appears in the listing's VERIFII column as Pending, then Completed.
- Use **View Status ↗** to see the result.
- VERIFII stores the records. Don't keep your own copies of ID documents unless you have to.

⚠️ If a purchaser answers that they intend to pay in **cash, cryptocurrency or barter**, or anything about the verification seems wrong, don't proceed. Contact support straight away. Don't "tip off" the purchaser about any concern.

19.5 Sales AML checklist

- [ ] Vendor verification sent before publishing (mandatory)
- [ ] Every vendor Completed before you rely on the authority
- [ ] Purchaser verification sent as soon as there is a buyer
- [ ] Every purchaser Completed before exchange
- [ ] Any red flags reported to support
- [ ] Sold status, price and date updated promptly (10.5)

CHAPTER 20

RealWorks, Pricefinder, NTD and other tools

Forms and leases, property data, tenancy checks, title searches and tenant services.

In this chapter

- Getting into RealWorks, and connecting it to PropertyMe, Reapit or DocuSign
- Pricefinder and the National Tenancy Database: the shared-login rules
- Title searches, Tenant Connections and Ideal Week

20.1 RealWorks (REIQ forms on the FULL plan)

💡 **Leases are now in The Form Manager**
Prepare leases (RTA Form 18a and R18), entry notices, notices to remedy breach and to leave, rent increase notices, condition reports, Form 6 and the bond lodgement form in **The Form Manager** (Chapter 27), not RealWorks. It is free on LITE and FULL, fills the details in for you and includes free electronic signing. Your old leases can be imported (27.10), and your old Realworks forms may already be in your **historical realworks** folder (27.11).

RealWorks (realworks.com.au) provides other REIQ forms and agreements. It is included in the **FULL** plan. On LITE, the RealWorks link shows an upgrade offer.

Use RealWorks only for REIQ forms that aren't in The Form Manager. Leases you made in RealWorks before can be imported into The Form Manager as PDFs or photos (27.10), and then used to fill new forms (27.13).

First-time access

1. In the Control Panel, choose **Forms & Paperwork → RealWorks** (this opens realworks.com.au).
2. Choose **SIGN UP**, or **Forgot password** if you have an account.
3. Use your **@theonsitemanager.com.au alias** as your email. The reset email goes to the alias and is forwarded to your inbox.
4. Set your own password and sign in.

⚠️ Don't change the agency's organisation details in RealWorks, and don't contact RealWorks or REIQ to change TheOnsiteManager's subscription. The Terms forbid it (23.2). Ask support instead.

Connecting RealWorks to PropertyMe, Reapit, Console or DocuSign

Integrations need a RealWorks **sub-organisation** for your business under TheOnsiteManager. It is requested for you by support, and it must **exactly match** your profile:

- [ ] Business name as registered
- [ ] ABN
- [ ] Corporate real estate licence number

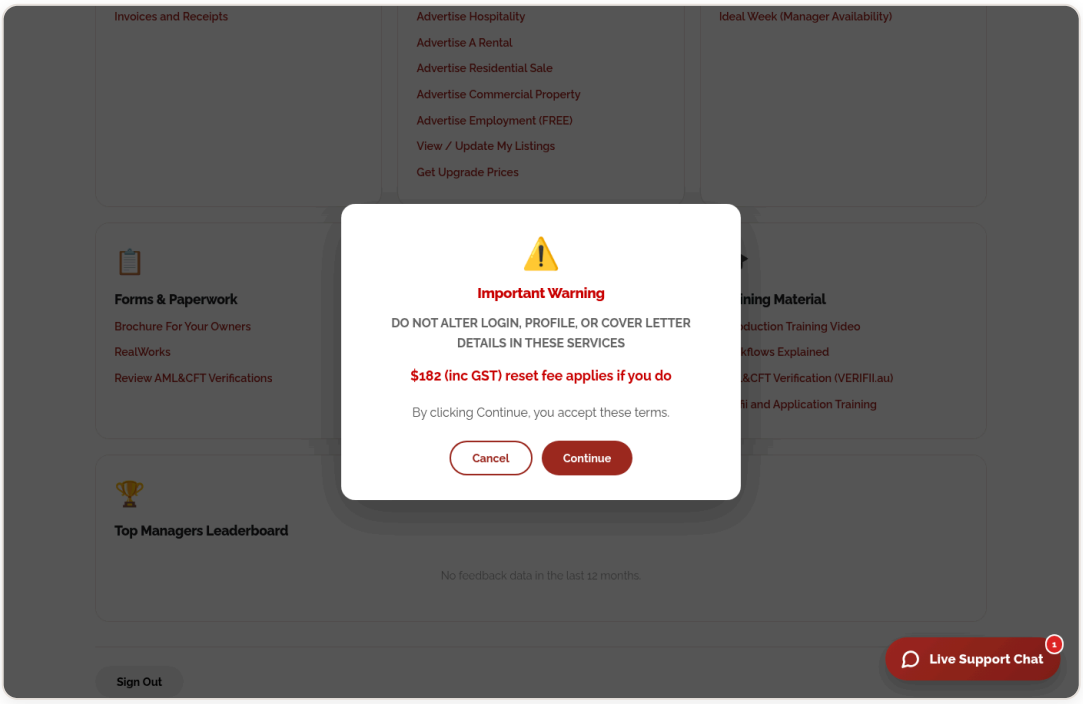
- [ ] Business street address

1. Complete these fields under **Edit My Account & Online Profile** (Chapter 21).
2. Ask support in Live Support Chat to request your RealWorks sub-organisation. Support uses the details saved in My Account, so **don't type your ABN, licence or address into the chat**. If something is wrong, correct it in My Account first.
3. Wait for confirmation that it has been approved. RealWorks and REIQ review these requests.
4. Then connect PropertyMe, Reapit, Console or DocuSign from within RealWorks.

> 🎧 **From the support desk**
> RealWorks access, forms and integrations are the **2nd most common** support topic (about 360 tickets). The usual causes: signing up with a personal email instead of the alias; the reset email filtered as junk; profile details that don't match the sub-organisation request; and expecting the integration before the sub-organisation is approved.

20.2 Shared database logins: read this first

Pricefinder and the National Tenancy Database use **agency logins shared by many managers**. When you open either one from the Control Panel, this warning appears:



LIVE UI · DEMO DATA Figure 75. The warning shown before Pricefinder or NTD opens.

> **DO NOT ALTER LOGIN, PROFILE, OR COVER LETTER DETAILS IN THESE SERVICES.** $182 (inc GST) reset fee applies if you do. By clicking Continue, you accept these terms.

Changing the password, the profile or the cover letter locks **every** manager out until the agency resets it. Choose **Continue** only if you accept this.

20.3 Pricefinder (QLD property data)

Pricefinder gives sales history, rental history and property reports for Queensland. It is included in **both LITE and FULL**.

1. Manager Tools → **Databases** → **PriceFinder QLD Database**.
2. Read the warning and choose **Continue**. Pricefinder opens, already signed in.
3. Search by address. Don't change any account settings.

> 🎧 **From the support desk**
> About **24 tickets** relate to Pricefinder, mostly "is it included?" (yes, LITE and FULL) and pop-up blockers. If nothing opens, allow pop-ups for theonsitemanager.com.au.

20.4 National Tenancy Database (NTD / VEDA)

The NTD lets you check whether an applicant has a tenancy default listing. Open it from **Databases** → **National Tenancy Database (VEDA)**, read the warning, and continue.

> ⚠️ **If NTD asks for a username or password, or says the agent number is locked**
> Don't use the NTD "forgot password" or reset form, and don't try to guess details. This affects everyone, and support is already dealing with it with the provider. Report it in Live Support Chat and wait for the all-clear. In early October 2026 the shared NTD login was locked for a period. Check with support for the current status.

Applicants can also pay for their own NTD check inside the VERIFII application (15.3, step 11).

20.5 Title searches

Databases → **Order A Title Search** opens the Titles Queensland product search, where you order and pay for title searches directly. Owner and vendor verifications that include a title search ($88.50 option) do this for you (17.4).

20.6 Tenant Services

- **Tenant Connections (MMI)**: offer incoming tenants help connecting electricity, gas, internet and more. Applicants can also opt in during the VERIFII application.
- **Ideal Week (Manager Availability)**: set the times you can attend inspections. There is a 48-hour booking buffer, and you must attend booked inspections (9.5).

20.7 Brochure for owners

Forms & Paperwork → **Brochure For Your Owners** opens a PDF explaining TheOnsiteManager's service, to give to owners when you take on a property. For a listing's own brochure, use **BROCHURE** on My Listings. It uses the listing's photos and shows your name, your mobile and your **@theonsitemanager.com.au** alias, so replies come to you. Use a mobile number in your agent details (21.4).

CHAPTER 21

Account settings, agent details and your profile

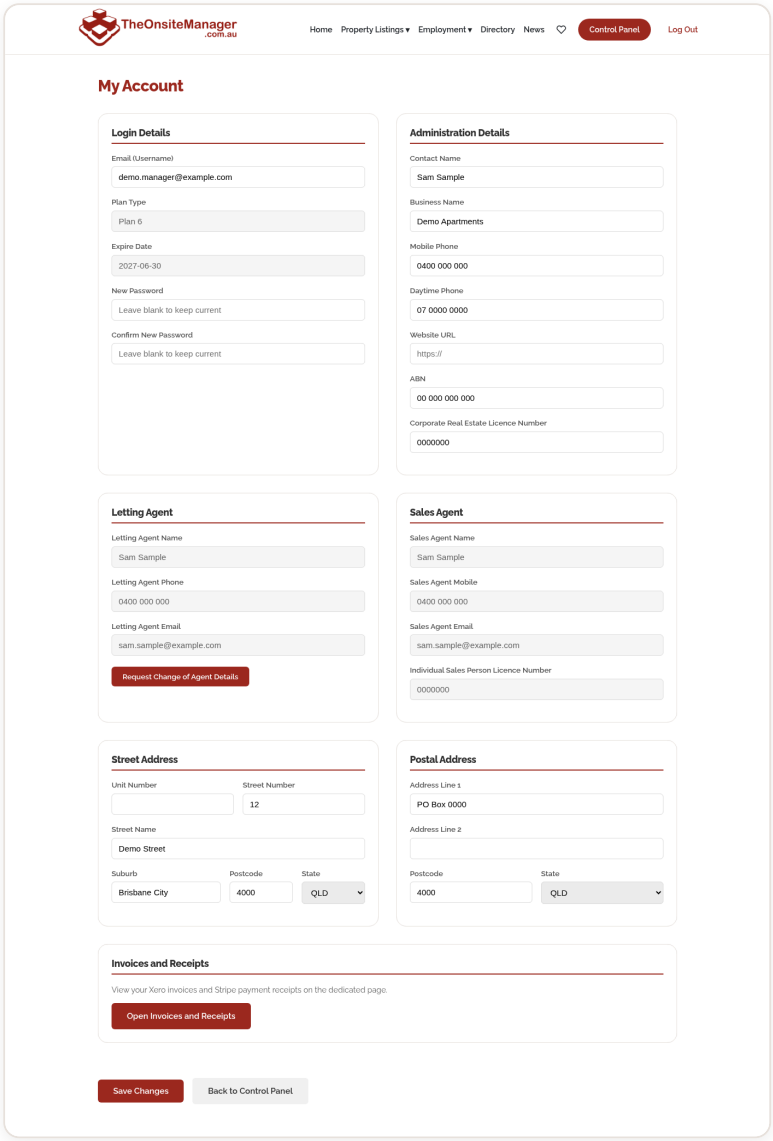
Keep your details correct. They appear on listings and drive integrations.

In this chapter

- Each section of the My Account page
- Changing your password
- Changing the letting or sales agent on your listings

21.1 Opening My Account

Go to the Control Panel → **Account Settings** card → **Edit My Account & Online Profile**.



LIVE UI · DEMO DATA Figure 76. My Account: login, administration, letting agent, sales agent, addresses, and a link to invoices.

21.2 Sections

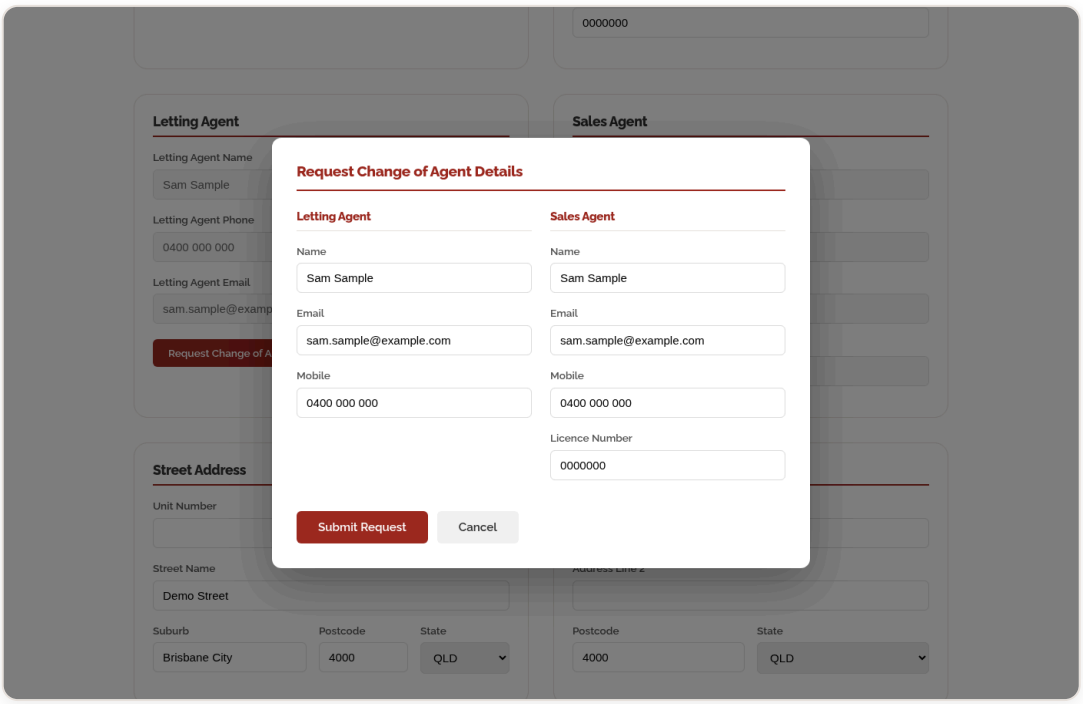
Section	Fields	Notes
Login Details	Email (username), Plan Type, Expire Date, New Password, Confirm New Password	Plan and expiry are read-only. Leave the password fields blank to keep your current password.
Administration Details	Contact Name, Business Name, Mobile, Daytime Phone, Website, ABN, Corporate Real Estate Licence Number	Must match your registered business. RealWorks and Inspect Real Estate sub-organisations depend on them.
Letting Agent	Name, phone and email shown on rental listings	Read-only. Use **Request Change of Agent Details**.
Sales Agent	Name, mobile, email and individual licence number shown on sale listings	Read-only. Use the same request button.
Street Address / Postal Address	Unit, number, street, suburb, postcode and state	Your business address.
Invoices and Receipts	Link	Chapter 12

Choose **Save Changes** when you are done.

21.3 Changing your password

1. Type the new password in **New Password** and again in **Confirm New Password**.
2. Choose **Save Changes**.
3. Use the new password next time you sign in. It doesn't change your RealWorks, Pricefinder or VERIFII access.

21.4 Changing the agent shown on listings



LIVE UI · DEMO DATA Figure 77. Request Change of Agent Details: enter the new letting and/or sales agent details for approval.

1. Choose **Request Change of Agent Details** under Letting Agent.
2. Enter the new details for the Letting Agent and/or Sales Agent (name, email, mobile and, for a sales agent, licence number). The mobile must be a mobile number, because it is used for two-factor verification.
3. Choose **Submit Request**. The change is **pending approval** by the agency, because every agent must be licensed and authorised.
4. Once approved, new and updated listings show the new agent.

🎧 **From the support desk**
Changing the agent or contact on an account comes up in about **66 tickets**. Agent changes always need approval. Existing listings pick up the new agent the next time they are published.

⚠️ Only licensed people authorised by the Principal can be shown as agents. Don't list another agency's staff (23.2).

CHAPTER 22

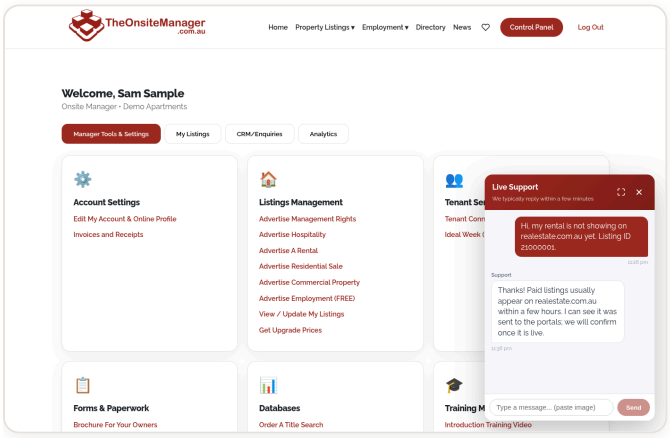
Live Support Chat and getting help

The fastest way to an answer, and how to ask so it's solved first time.

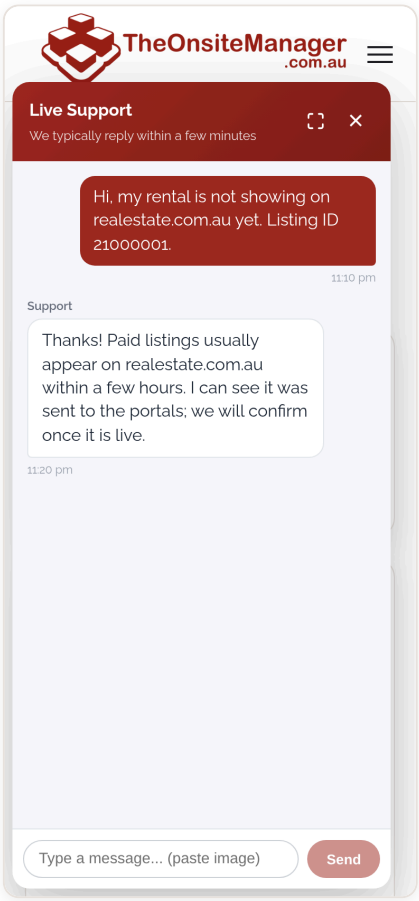
In this chapter

- Opening and using Live Support Chat
- What to include in a request
- What support can and can't do

22.1 Opening the chat



LIVE UI · DEMO DATA Figure 78. Live Support Chat open in the Control Panel (desktop).



LIVE UI · DEMO DATA Figure 79. Live Support Chat on a phone. It opens full screen.

1. Sign in. The red **Live Support Chat** button appears at the bottom right of every page.
2. Select it to open the **Live Support** panel ("We typically reply within a few minutes").
3. Type your message and choose **Send**. To share a screenshot, **paste** it into the message box (Ctrl+V or ⌘V).
4. Leave the panel open or come back later. Replies appear in the same conversation, and a red badge shows unread replies.

5. Use ⛶ to expand the panel and × to close it.

ℹ️ The first reply may come from an automated assistant trained on the support team's answers. It hands over to a person when needed. Chat is available to signed-in managers only.

22.2 How to ask so it's solved first time

- ☐ The **Listing ID** (8 digits, from My Listings)
- ☐ What you were trying to do, and what happened instead
- ☐ The **exact error message**, or a pasted screenshot
- ☐ The portal and link, if a portal is wrong
- ☐ For applications: the applicant's first name and the listing, never their documents

Good example

"Listing 21000001: I marked it Leased and published yesterday at 3 pm, but it's still live on Domain (link pasted). WITHDRAW AGAIN done this morning."

22.3 What support can and can't do

Support can	Support can't
Explain how to do something and look into errors	Change a paid listing's address (use CLONE, 10.3)
Check portal deliveries and re-send feeds	Refund fees, except as required by the ACL
Look up payments and receipts	Skip AML on sales, or edit sold details without AML
Reset your TheOnsiteManager password	Give out shared logins or other managers' information
Request RealWorks and Inspect Real Estate sub-organisations	Promise a configuration change or a new feature date

💡 Please use chat rather than phone. Chat keeps a written record, lets you paste screenshots, and reaches whoever is on duty.

CHAPTER 23

Acceptable Use Policy and advertising rules

The rules you agreed to as an LREA under TheOnsiteManager's licence, quoted and explained.

In this chapter

- Key parts of the TheOnsiteManager Terms and Conditions, quoted
- The realestate.com.au Acceptable Use Policy obligations, explained
- Photo, wording and listing rules, and how the system enforces them
- Privacy obligations when handling applications and verifications

ℹ️ This chapter quotes the **Terms and Conditions of TheOnsiteManager.com.au** (owned and operated by Refreshweb Group Pty Ltd, ACN 611 831 059; last updated 2026) and summarises them. The full Terms at theonsitemanager.com.au/terms.html, and the full realestate.com.au Acceptable Use Policy, **prevail** over this summary.

23.1 Who the Terms apply to

> These Terms apply to: General website visitors and users; and Licensed Real Estate Agents ("LREAs") who act under the principal real estate agency licence held by Refreshweb Group Pty Ltd in connection with TheOnsiteManager real estate agency activities.
>
> Terms §1

As an onsite manager advertising through TheOnsiteManager, you are an **LREA** acting under the agency's principal licence. You must hold a current licence in your State and follow real estate law and codes of conduct (§6).

23.2 Key rules from the Terms

General use (§3)

> You must not: Use the Service in any way that violates any applicable Australian law, regulation, or third-party rights; Attempt to gain unauthorised access to any part of the Service, accounts, systems, or networks; … Scrape, harvest, or collect data from the Service without our prior written consent; Impersonate any person or entity; or Use the Service to engage in misleading, deceptive, defamatory, or illegal conduct.
>
> Terms §3

Accounts (§4)

Keep your details accurate and your login confidential. You are responsible for **all activity under your account**, and must tell us immediately about any unauthorised use.

Fees and refunds (§5)

> All service requests, orders, subscriptions, listings, advertising placements, agency services, platform features, and any other paid or requested services … are final and non-refundable. … Any cost estimates, quotes, or price indications provided by us … are indicative only, are not binding, and are subject to change without notice.

> Terms §5

In practice: check the Review total before you publish. Use Save As Draft if you're unsure. Prices in this manual are a guide only. Refunds are given only where the Australian Consumer Law requires.

Specific rules for LREAs (§6)

> In the performance of tasks under TheOnsiteManager licence, LREAs must not:
> • Make any representation that they act for any other real estate agency. This includes … displaying logos of other agencies in advertising produced by or for TheOnsiteManager; applying another agency's details to Comparative Market Analyses (CMAs) or advertising …; or allowing unauthorised third parties from other agencies to use TheOnsiteManager's agency services without prior written approval from the Principal.
> • Engage in any conduct that causes TheOnsiteManager or the Company to breach its terms of use with suppliers or any applicable legislation. This includes … breaching copyright, engaging in hate speech, listing property without proper authority, engaging in deceptive or misleading conduct, aiding criminal activity, or sharing confidential information.
> • Falsely assume the role of a company director or executive of the Company … This includes … attempting to change login credentials on third-party software systems used by the agency, or directly contacting the agency's third-party suppliers to place orders or make changes to products or agreements.
>
> Terms §6

What it means day to day	Example of a breach
Advertise only as TheOnsiteManager	Another agency's logo on a brochure, floorplan or photo; a CMA on another agency's letterhead
Keep the agency's tools for authorised people	Letting a colleague from another agency use your login or the shared databases
Hold a signed authority before listing	Advertising a unit "as a favour" without a signed appointment
Respect copyright	Re-using the previous agent's photos or wording without permission
Don't change shared logins	Resetting the Pricefinder or NTD password ($182 reset fee, 20.2)
Don't contact suppliers on the agency's behalf	Calling REA, Domain, RealWorks or Equifax to change the agency's products or account

⚠ **Personal liability**
Under §6, a breach may make the LREA **personally and financially liable** for resulting damages, losses and costs, including legal costs on a full indemnity basis. §12 adds a general indemnity.

23.3 realestate.com.au Acceptable Use Policy (§7)

> Where LREAs or the agency use the realestate.com.au platform … they must comply in full with the realestate.com.au Acceptable Use Policy – Residential (as amended from time to time, including the version amended December 2025) and any related REA terms.
>
> Terms §7

The Terms list the key obligations. This table sets each one beside what it means for your listings and how TheOnsiteManager helps:

REA obligation (Terms §7)	What it means for you	System support
Bona fide listings with proper authority	Only real properties you are appointed to market	AML vendor checks; authority is your responsibility
Correct categorisation; no commercial on residential; no share-house rooms as residential rentals; no short-term/holiday; no Build-to-Rent; no multiple properties in one listing	One property per listing, in the right category and site	Category step; Commercial goes to RealCommercial
No advertising the agency or agents within listings; no misuse of fields	The description describes the property only. No names, logos or slogans in the wording.	**Wording checker** blocks business names (Ch. 8)
No references to third parties or off-platform contact details or links	No phone numbers, emails or websites in the ad. Enquiries come through the portal.	**Wording checker** blocks phones, emails and URLs
No watermarks (except limited transparent ones); no borders, text or marketing in photos; no collages	Clean photos only. No "FOR LEASE" banners, logos or phone numbers on images.	Your responsibility
No incorrect or lifestyle main images	Photo 1 must show this property, not the beach, a café or a stock image	Photo order (7.3)
No false street or place names	Use the real address and suburb	Address autocomplete; address lock
No duplicate or refreshed/recycled listings	Don't withdraw and relist to bump the ad. Don't reuse an old listing for a new campaign or a different property.	UPDATE hidden on leased/sold; address lock; CLONE for new campaigns
No listing without authority or where not the primary agent; no impersonation; no reselling; no unsubscribed offices; no listing in unlicensed States	List only what you are authorised to list, as TheOnsiteManager	Agent details approval (21.4)
No misleading or deceptive conduct	Accurate price, size, features and status	–
Update sold or rental status promptly	Mark Leased or Sold the same day	Status lock words (8.3); Leased/Sold flow (10.5)
Rules on images, video, pricing, branding consistency, data manipulation and authenticity verification	Real, current media; honest pricing; no tricks to game search	Low-quality photo warning (7.2)

> The full current realestate.com.au Acceptable Use Policy prevails. Breaches may result in suspension or termination of access under these Terms in addition to any action by REA Group. LREAs remain responsible for ensuring all listings and conduct comply.
>
> Terms §7

23.4 Quick rules card

Wording

- Describe the property only
- No phone, email, website or business name
- No "leased", "under application" or "pending" on available rentals
- Nothing discriminatory or misleading

Photos and media

- This property only; best photo first
- Landscape, at least 1000 px wide
- No logos, text, borders, collages or watermarks
- Floorplans in GIF, also logo-free
- Your own photos, or used with permission

Listings

- Signed authority first
- One property, correct category
- Correct address (it locks after payment)
- New campaign = new listing (CLONE)
- Leased or Sold updated the same day

23.5 Privacy when handling applications and verifications

TheOnsiteManager handles personal information under the **Privacy Act 1988 (Cth)** and the Australian Privacy Principles (Privacy Policy, August 2026). Information is used to provide agency services and to meet legal obligations, *"including real estate licensing and anti-money laundering requirements"*. It is not sold. As an LREA you must protect what you see:

- Open applications and verifications only for listings you manage.
- Don't download or forward ID documents unless you need to. Share application PDFs only with the owner.
- Never post applicant or owner details in chat groups, social media or emails to third parties.
- Delete local copies when you no longer need them.

23.6 Other terms worth knowing

- **Intellectual property (§8)**: you keep ownership of content you upload, but grant the agency a licence to use it to operate and promote the Service.
- **Liability (§11)**: the Service and third-party systems are provided "as is". Liability is capped at the fees paid in the last 12 months (or AUD $100).
- **Termination (§13)**: access can be suspended for a breach.
- **Governing law (§15)**: Queensland.

CHAPTER 24

Common problems and fixes

The top 20 support topics, ranked by how often managers ask, with the fix for each.

How this list was made

- We reviewed about 2,950 support tickets and 19,000 live-chat messages, plus the support team's playbook of model answers, and grouped them by topic. A ticket can count towards more than one topic.
- Each entry gives the symptom, the usual cause, the fix, and where to read more. Appendix C is an alphabetical index.

Payments, pricing and packages

#1 · ~469 tickets

Symptoms: "Why am I being charged?", "What does Standard include?", "Can I get a refund?"

Usual cause: the listing came back after being leased, sold or hidden for more than 5 days, or the paid window ended. Or there's confusion between REA and Domain levels.

Fix: check the Review total before publishing, and use Save As Draft if unsure. A new campaign means a new listing. Fees are non-refundable except under the ACL. → **11.1–11.6, 10.2, 23.2**

RealWorks access, forms and integrations (PropertyMe, Reapit, Console, DocuSign)

#2 · ~360 tickets

Usual cause: signed up with a personal email instead of the alias; reset email in junk; profile details (ABN, corporate licence, address) don't match the sub-organisation request; integration attempted before the sub-organisation was approved; LITE plan.

Fix: sign up or reset with your alias; complete your profile; ask support to request the sub-organisation; wait for approval. → **20.1, 21.2**

Leased, inactive or withdrawn listing still showing, or still getting enquiries

#3 · ~349 tickets

Usual cause: status changed but not published; portal processing delay; a copy site (for example Allhomes from Domain).

Fix: UPDATE → Leased → **Publish**; wait up to 24 hours; WITHDRAW AGAIN; then send support the Listing ID and the portal link. → **10.5–10.7, 13.6**

VERIFII applications: finding them, links, viewing, PDF, 2Apply

#4 · ~346 tickets

Usual cause: looking in email instead of My Listings; trying a password on VERIFII; co-tenant not invited; applicants using an old 2Apply flow.

Fix: My Listings → APPLICATIONS → Show details → View in VERIFII → PDF. Never use a password; reopen from My Listings. Check co-tenant statuses. → **15.5–15.7, 16.2, 13.5**

Listing not on REA, or REA not updating

#5 · ~307 tickets

Usual cause: REA not paid (NOT ON REA); change not published; processing time; a portal ERROR.

Fix: check the pills; UPDATE & PUBLISH with an REA level; allow a few hours; read any ERROR; check DATA LOGS; then contact support. → **13.3, 13.7, 13.8, 4.3**

Login, password and account access

#6 · ~276 tickets

Usual cause: wrong email; saved old password; using your TheOnsiteManager password on another system. There is no self-service reset yet.

Fix: use Live Support Chat from another signed-in device, or the contact details shown under Forgot Password. Change your password in My Account once you're in. → **2.2–2.3, 21.3**

Enquiry emails not received

#7 · ~214 tickets

Usual cause: email filtering (Microsoft 365, Outlook.com and Hotmail especially); the enquiries are in the CRM.

Fix: check the CRM; check Junk and Deleted Items; add safe senders; ask your IT provider for a safe-senders rule. → **14.14, 2.4**

Address wrong, locked, or unit number missing

#8 · ~200 tickets

Usual cause: manual entry typos; unit left out; the address locks after payment; Domain blocks changes.

Fix: before paying, pick from the suggestions and check the unit (4/12). After paying: WITHDRAW, CLONE, correct the address, and publish (new fee). → **5.4, 10.3**

Photos, photo order and floorplans

#9 · ~147 tickets

Usual cause: reordered but not published; new photos can't be dragged among saved photos until saved; floorplan not a GIF; portrait or small images.

Fix: save first, then reorder, then Publish; floorplans as .gif; landscape photos ≥1000 px. → **7.1–7.5**

Domain issues

#10 · ~145 tickets

Usual cause: address changes rejected; photos or price not refreshed; Allhomes copying from Domain.

Fix: use the clone method for address changes; re-publish and wait; report persistent issues with the link. → **13.9, 10.3**

Inspections, open homes and QR check-in

#11 · ~141 tickets

Usual cause: inspection times not published; Inspect Real Estate sub-organisation not set up; stale times on a clone.

Fix: add times, then Publish; complete your profile and ask support about the iRE sub-organisation; use OPEN HOME for a QR sheet per listing; find attendees in the CRM. → **9.1–9.4**

AML owner and vendor verification

#12 · ~125 tickets

Usual cause: owners questioning the fee; overseas owners without an Australian mobile; sale blocked without vendor details; "Token not found" in the dashboard.

Fix: explain the fee ($38.50 or $88.50 with title search); the mobile is optional; send the vendor request from Review; work from My Listings. → **17.2–17.6, 18.2–18.7**

Editing a live listing asks for payment

#13 · ~115 tickets

Usual cause: the listing is being brought back after more than 5 days hidden, leased or sold, or the window has ended; an upgrade is selected.

Fix: check what's selected on Review; Save As Draft and ask support if unsure; use CLONE for a new campaign. → **10.1–10.2**

Clone, old listings and re-advertising #14 · ~80 tickets

Usual cause: UPDATE missing on leased or sold listings; attempts to recycle old listings (banned by REA).

Fix: CLONE → check everything → add inspections → Publish. → **10.4**

Portal upgrades (Feature, Highlight, Premier) #15 · ~75 tickets

Usual cause: upgrades are booked by hand within 24 hours and always show as "Standard" in the panel.

Fix: check REA after 24 hours; send the Listing ID and receipt if it's still missing. → **11.4**

Changing the agent or contact on the account #16 · ~66 tickets

Fix: My Account → Request Change of Agent Details → wait for approval → republish listings. → **21.4**

Invoices and receipts #17 · ~63 tickets

Fix: Control Panel → Invoices and Receipts (matched to your login email). For a missing receipt, send the date, amount and last 4 card digits. → **12.1–12.3**

Pricefinder #18 · ~24 tickets

Fix: included in LITE and FULL; allow pop-ups; never change the shared login. → **20.2–20.3**

Ad wording checker blocks "Next" #19 · ~24 tickets

Usual cause: a phone number, email, URL or business name, including 8-digit numbers such as Listing IDs.

Fix: remove or rephrase the flagged text. → **8.2**

NTD / VEDA login #20 · ~22 tickets

Usual cause: the shared login is locked or asks for credentials.

Fix: don't use the reset form. Report it in chat and wait for the all-clear. → **20.4**

24.1 Quick fixes for other messages

Message or symptom	Fix
"Popup blocked. Please allow popups for this site"	Allow pop-ups for theonsitemanager.com.au in your browser settings, then try again.
"Please complete the required fields for this step."	Look for empty fields marked * (for example Bathrooms*, or the unit number for unit categories).
"Floor plan must be a GIF file."	Convert the floorplan to .gif (7.5).
"Sale price must be a number above $50,000." / "Sale date is required…"	Enter the sold price (numbers only) and a past sale date.
"Clone failed" / "Withdraw failed"	Refresh and try again. If it repeats, send support the Listing ID and the message.
Status locked to Off Market	Remove "leased", "under application" or "pending" from the wording (8.3).
VERIFII "invalid credentials"	Close it and reopen from My Listings → View Status. Never use a password (15.1).

Co-tenant "recently sent"	Wait a few minutes before resending (15.5).
Renewal window won't close	Your agreement has expired. Renew to restore access (12.4).
Inspection Manager: "Sending is blocked"	The owner isn't registered or hasn't completed VERIFII. Register or remind them, then Check again (25.4).
Inspection Manager: tenant not listed	Send the VERIFII application link, or add the tenant manually with a reason (25.4).
Inspection Manager: report can't be edited	It's signed or sent. Reopen to edit, which cancels signatures and links (25.13).

ℹ️ THE Inspection Manager is a new beta feature, so it isn't in the support ranking above yet. Its full troubleshooting table is in 25.15.

CHAPTER 25

THE Inspection Manager (beta)

Do entry, exit and routine inspections on your phone, tablet or computer. The app fills in the official Queensland RTA form, and the tenant signs electronically.

In this chapter

- What THE Inspection Manager is, who can use it, and where the button is
- Why owners must be registered and verified in VERIFII before a report can be sent
- Creating entry, exit and routine reports: rooms, items, photos and notes
- Comparing entry with exit, and the official RTA Form 1a and Form 14a
- Signing, sending, tenant e-signing, locking, reopening and finalising
- Tips, troubleshooting, FAQ, reporting bugs and what's coming

ℹ️ **Beta**

THE Inspection Manager is a **beta** feature. It works, but screens and wording may still change, and we want your feedback (25.17). The screenshots in this chapter come from the test (staging) version with made-up demo data. That's why the site logo is missing at the top and some icons appear as small boxes.

25.1 What THE Inspection Manager does

THE Inspection Manager replaces the paper condition report. For each rental or real estate listing it keeps a permanent history of inspection reports. For each report you:

1. walk through the property room by room, ticking **Clean**, **Undamaged** and **Working** for each item;
2. add notes and photos, and mark up photos to show a problem;
3. let the app fill in the **official Queensland RTA form** (Form 1a for entry, Form 14a for exit) with your photos added as annexures at the back;
4. sign it yourself, then send it to the owner and tenant from their VERIFII details. The tenant checks it, comments and signs through a private link.

Report type	When you use it	What the PDF looks like
Entry condition report	At the start of a tenancy, before the tenant moves in.	Official RTA **Form 1a**, filled in, plus annexures
Exit condition report	At the end of a tenancy. It starts from the entry report so the two can be compared.	Official RTA **Form 14a**, filled in, plus annexures and an entry vs exit comparison
Routine inspection	During the tenancy (in Queensland no more than once every 3 months, with an entry notice).	A TheOnsiteManager report (there is no official RTA routine form). Rooms are rated rather than ticked Y/N.

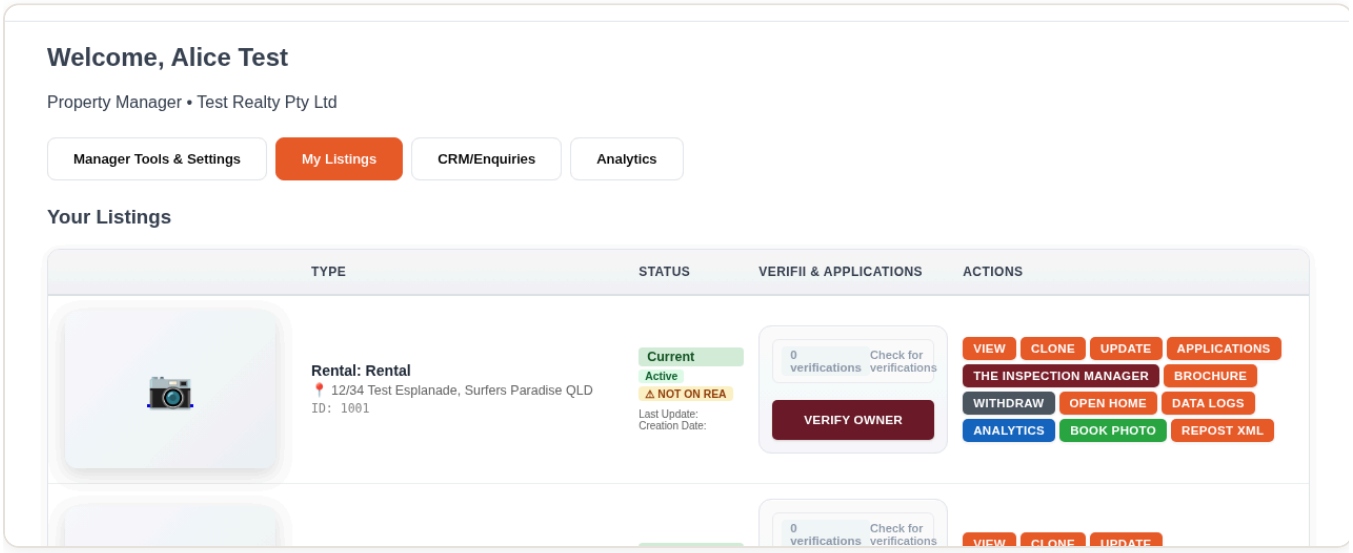
⚠️ The forms are the **Queensland** RTA forms only. Don't use them for properties in other states. The form version (for example "QLD-1a v20 Oct26") is shown next to the report title and stored with every report.

25.2 Who can use it and what it costs

- **All LITE and FULL managers** can use THE Inspection Manager.
- It is **free** during the beta. There is nothing to buy or switch on.
- It works on desktop, tablet and phone browsers. There is no separate app to install.
- You can only see and open reports for your own listings. Another manager who opens your report's address gets an "access refused" message.

25.3 Where to find the button

Go to **My Listings** on your Control Panel. Every **rental** and **real estate** (sale) listing has a dark red **THE INSPECTION MANAGER** button among its action buttons. Commercial and other listing types don't have it.



STAGING BUILD · DEMO DATA Figure 80. My Listings: THE INSPECTION MANAGER button on a rental and a real estate listing. The commercial listing (bottom) doesn't have it.

Choosing the button opens the listing's **Inspection hub**. The hub shows the address, the owners and tenants from VERIFII, and every report for the property. On a phone the hub and the reports work the same way; the layout simply stacks.

25.4 Before you send: owners and tenants come from VERIFII

You can **always** create, fill in and sign a report. But **a report can only be sent once the owner (rentals) or vendor (real estate) has been registered in VERIFII and has completed verification (CDD)**. This is how we know who the owner is before their property's records are sent anywhere.

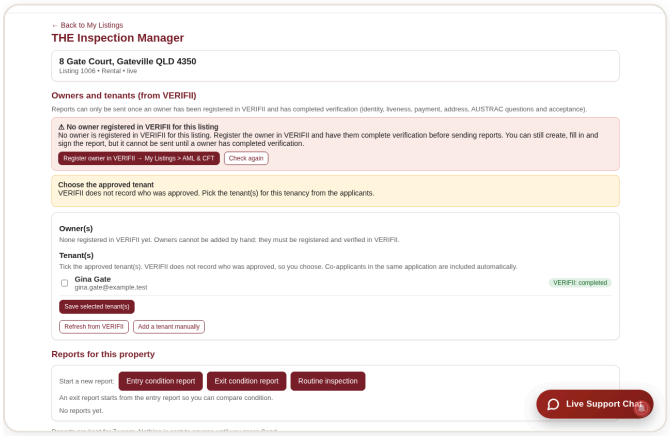
⚠️ **Owners can't be typed in by hand**

There is no "add owner manually" option. If no owner appears, the owner must be registered in VERIFII with **VERIFY OWNER** (or **VERIFY VENDOR**) on My Listings, and must finish their link (Chapter 18).

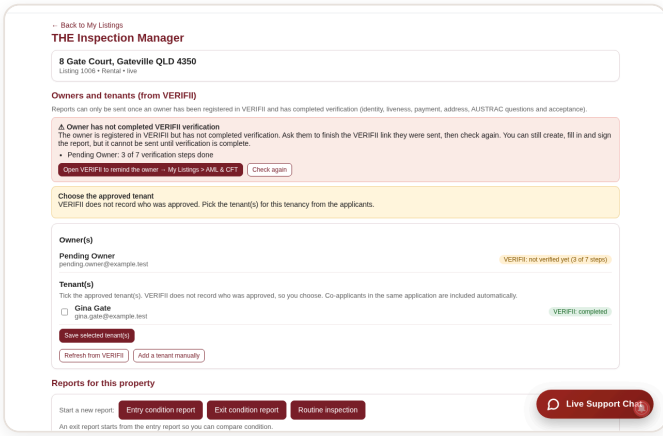
"Completed verification" means the owner has finished every required VERIFII step: proof of email, identity document, liveness check, payment, address, the AUSTRAC questions and the landlord/vendor

acceptance. The hub shows each owner's status:

What the hub shows	What it means	What to do
Green **Owner verified** banner; owner tagged *VERIFII: verified (CDD complete)*	At least one owner has completed VERIFII. Reports can be sent.	Nothing. Carry on.
Red **No owner registered in VERIFII for this listing**	Nobody has been registered as the owner for this listing.	Start the owner registration: **VERIFY OWNER** / **VERIFY VENDOR** on My Listings (18.2). Then press **Check again**.
Red **Owner has not completed VERIFII verification**, with progress such as "3 of 7 steps done"	The owner was registered but hasn't finished the link.	Remind the owner. The VERIFY OWNER button on My Listings shows their progress and lets you resend. Then press **Check again**.
Blue **Not every owner has completed verification**	With two or more owners, at least one is verified.	You can send now. Only the verified owner(s) receive the report; the others show "not verified yet".
Could not confirm the owner in VERIFII	VERIFII couldn't be reached at that moment.	Wait a minute and press **Check again**. Sending stays blocked until the owner's status can be confirmed.



STAGING BUILD · DEMO DATA Figure 81. No owner registered in VERIFII. You can still create, fill in and sign the report.

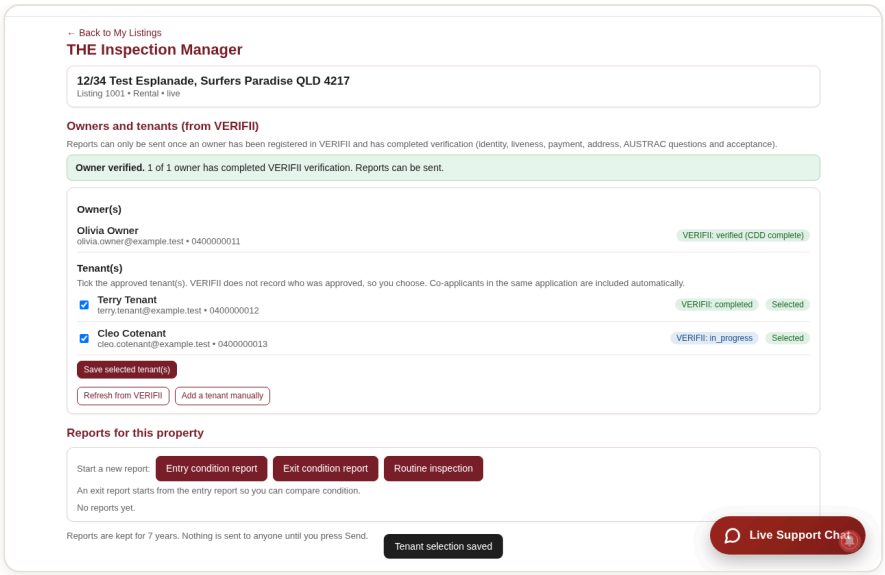


STAGING BUILD · DEMO DATA Figure 82. Owner registered but verification not finished, with the step progress.

Tenants

Every rental application should come through VERIFII (Chapter 15). The hub lists the VERIFII applicants for this listing. VERIFII doesn't record who was approved, so **you** choose:

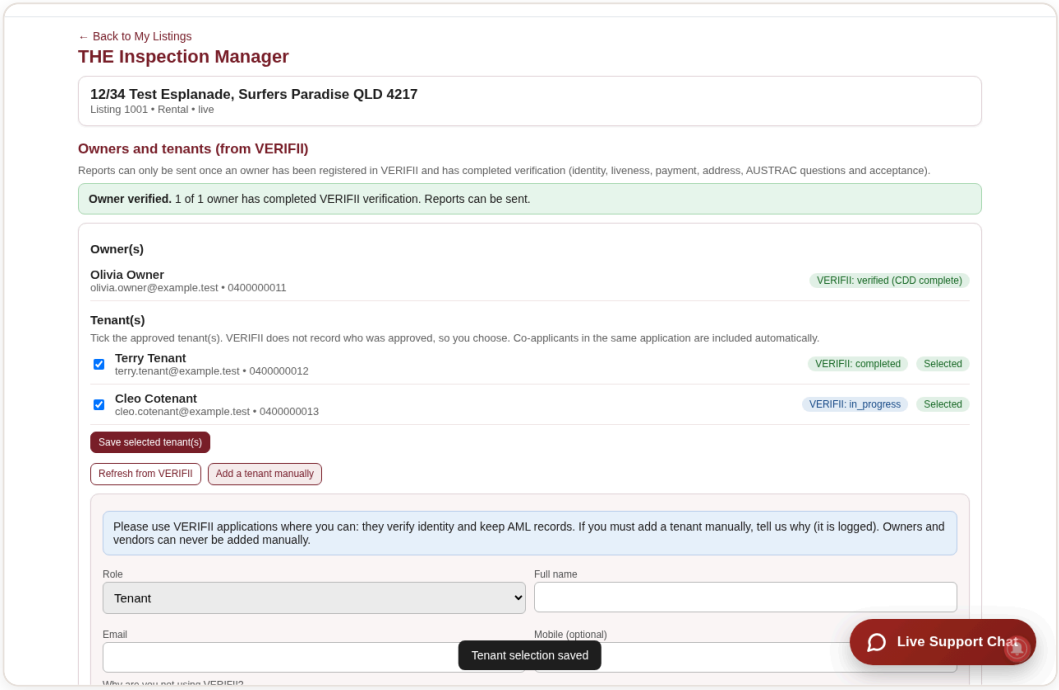
1. Under **Tenant(s)**, tick the approved tenant. Co-applicants on the same application are included automatically.
2. Choose **Save selected tenant(s)**. A "Tenant selection saved" message appears.
3. If an applicant has only just finished, choose **Refresh from VERIFII**.



STAGING BUILD · DEMO DATA Figure 83. The hub with a verified owner and two selected tenants (demo data). The report buttons are at the bottom.

If no tenant application appears, the hub shows *No tenant application in VERIFII for this listing*. You have two choices:

- **Best: Copy VERIFII application link** and send it to the tenant. When they apply, their details flow into the report automatically.
- **If you must: Add a tenant manually**, with their name, email and a **reason**. The reason is recorded. Use this only when the tenant genuinely can't apply through VERIFII (for example, a tenancy that started before VERIFII).



STAGING BUILD · DEMO DATA Figure 84. Adding a tenant manually. The reason you enter is logged.

💡 You don't need to wait. Do the inspection first. Only **sending** needs a verified owner and a tenant.

> ℹ️ In the standard set-up, nothing is sent to **anyone** (including the tenant) until at least one owner is verified. Register the owner in VERIFII as soon as you take on a property, so you are never held up at the start of a tenancy.

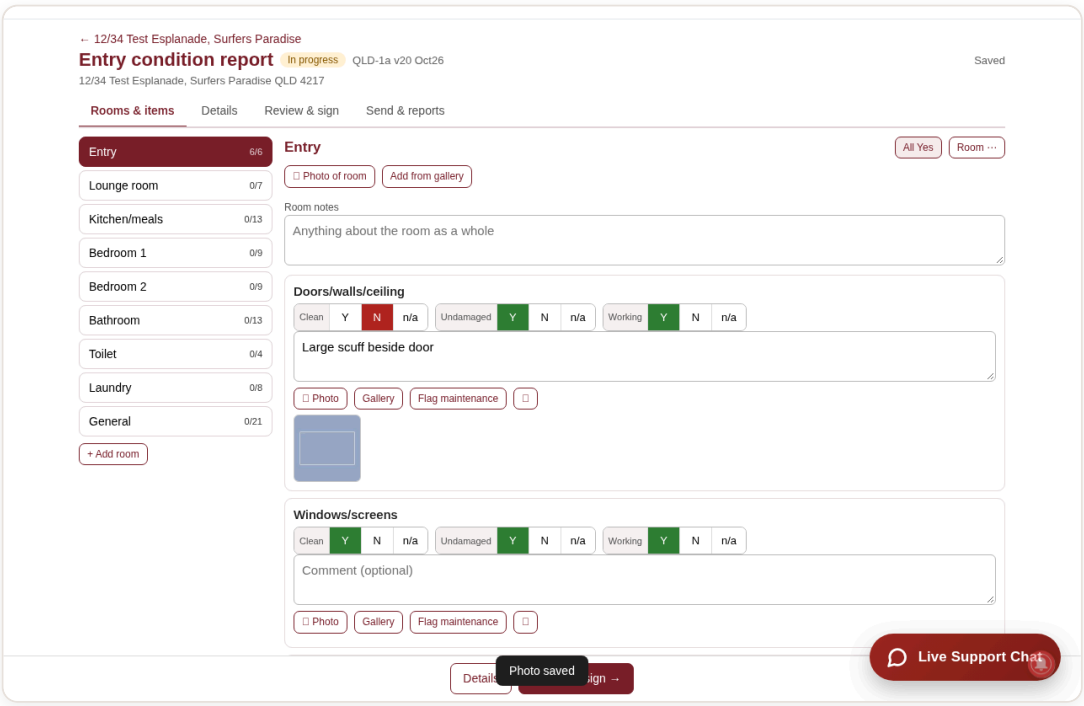
25.5 Creating a report

1. Open the hub (25.3) and check the owners and tenants (25.4).
2. Under **Reports for this property**, choose **Entry condition report**, **Exit condition report** or **Routine inspection**.
3. The report opens on the **Rooms & items** tab, with the rooms from the official form already loaded (Entry, Lounge room, Kitchen/meals, Bedrooms, Bathroom, Toilet, Laundry, General).
4. Your work saves as you go. "Saved" appears at the top right. You can leave and come back at any time from the hub.

> ℹ️ An **exit** report starts from the entry report for the same property. The rooms and items are copied so the two can be compared item by item (25.8).

Each report has four tabs: **Rooms & items**, **Details**, **Review & sign** and **Send & reports**.

25.6 Rooms, items, photos and notes



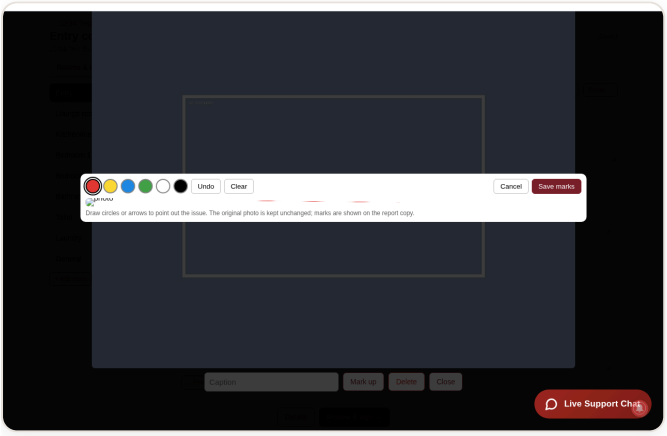
STAGING BUILD · DEMO DATA Figure 85. The Rooms & items tab. Rooms are on the left with a count of answered items; each item has Clean, Undamaged and Working buttons, a comment, photos and Flag maintenance.

1. Pick a room on the left (along the top on a phone). The counter, such as **6/6**, shows how many items are answered.
2. For each item choose **Y**, **N** or **n/a** for **Clean**, **Undamaged** and **Working**.

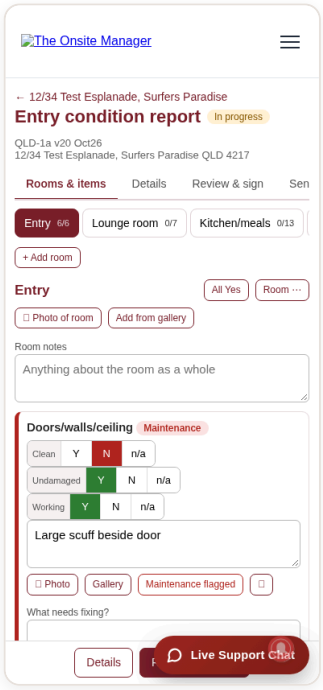
3. Write a short comment for anything that isn't Y, for example "Large scuff beside door".
4. If a room is in perfect order, choose **All Yes**, then change only the exceptions.
5. Use **Room notes** for anything about the room as a whole.

Photos

- **Photo** takes a picture with your phone or tablet camera; **Gallery** picks one you already have. **Photo of room** adds a photo for the whole room.
- Tap a photo to open it. You can add a **caption**, **Mark up** (draw on it to circle or point to the problem) or **Delete** it.
- The original photo is kept unchanged; your markings are stored as a separate copy. Photos are resized for the report and their **location data is removed**.
- Each photo can be up to 15 MB, and a report can hold up to 600 photos.



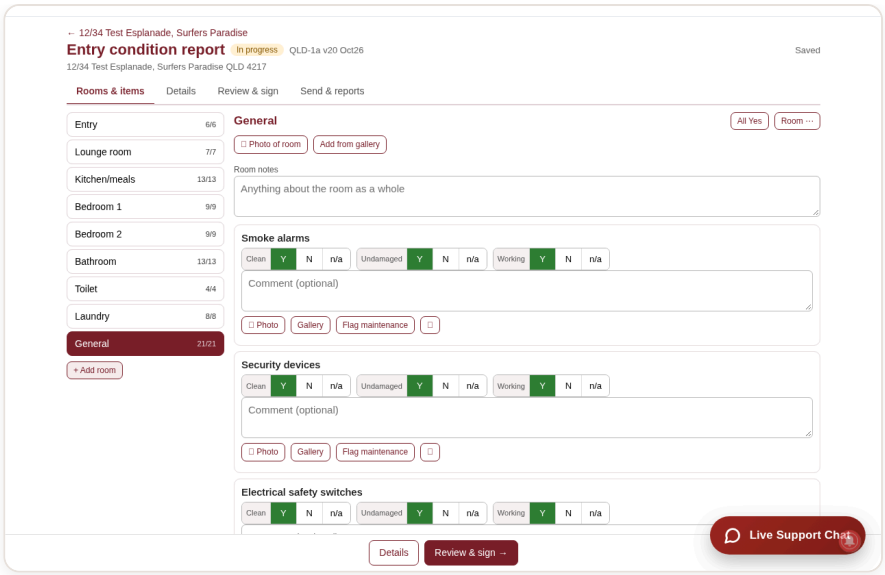
STAGING BUILD · DEMO DATA Figure 86. Marking up a photo: choose a colour and draw on the problem.



STAGING BUILD · DEMO DATA Figure 87. The same checklist on a phone.

Maintenance, extra rooms and items

- **Flag maintenance** marks an item that needs fixing. Say **what needs fixing** and choose a **priority**.
- **+ Add room** adds a room that isn't on the form (for example a balcony or study). The **Room ···** menu lets you rename or duplicate a room, or add items. Extra rooms print on an "Additional rooms" annexure with the same columns.

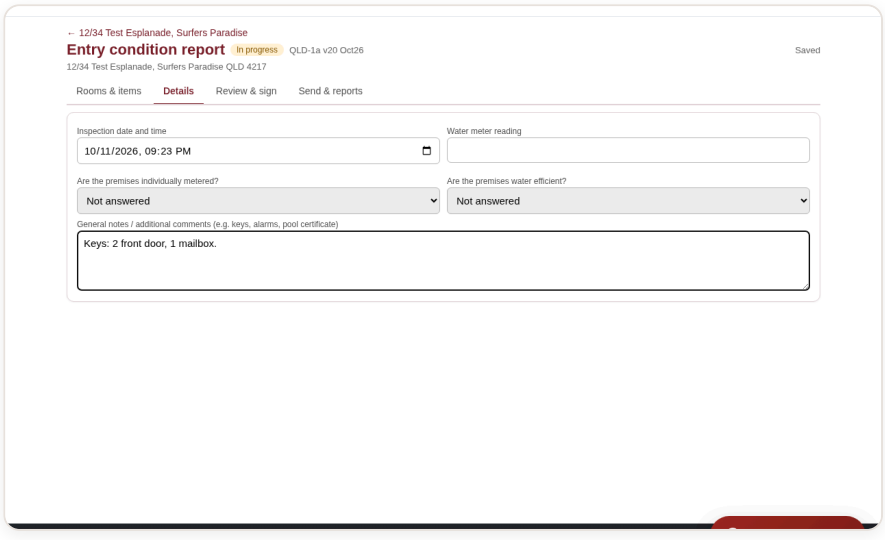


STAGING BUILD · DEMO DATA Figure 88. A custom room added with + Add room.

> ⚠ **Respect the tenant's privacy**
> In routine inspections especially, avoid photographing the tenant's belongings, documents and people. Photograph the condition of the property, not the tenant's life.

25.7 The Details tab

Use **Details** for the inspection date and time, the water meter reading, whether the premises are individually metered and water efficient, and general notes (keys, alarms, pool certificate and so on). On an exit report, the tenants' forwarding details also go on the form.

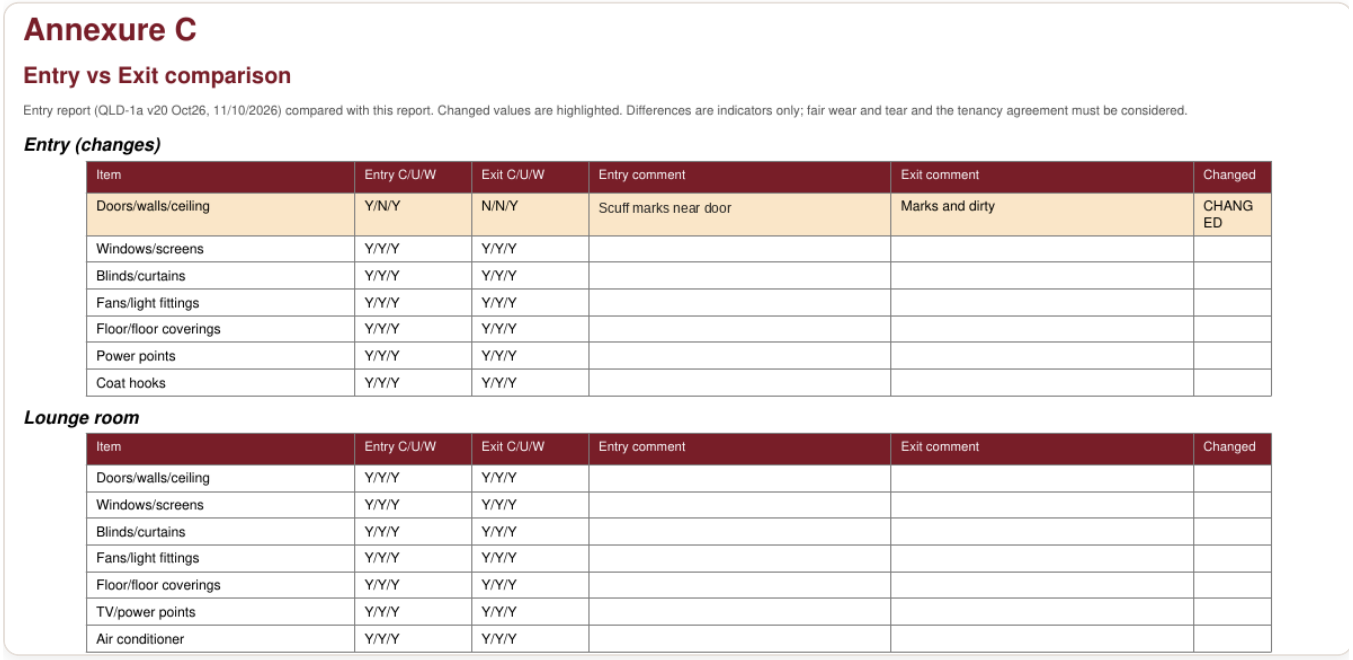


STAGING BUILD · DEMO DATA Figure 89. The Details tab.

25.8 Comparing entry and exit

When you create an exit report, the app copies the rooms and items from the entry report. On the **Review & sign** tab of an exit report, the **Compared with the entry report** panel tells you how many items have changed since the entry report.

The exit PDF also includes **Annexure C: Entry vs Exit comparison**. For every item it shows the entry and exit Clean/Undamaged/Working values and comments side by side, with changed items highlighted.



Annexure C

Entry vs Exit comparison

Entry report (QLD-1a v20 Oct26, 11/10/2026) compared with this report. Changed values are highlighted. Differences are indicators only; fair wear and tear and the tenancy agreement must be considered.

Entry (changes)

Item	Entry C/U/W	Exit C/U/W	Entry comment	Exit comment	Changed
Doors/walls/ceiling	Y/N/Y	N/N/Y	Scuff marks near door	Marks and dirty	CHANGED
Windows/screens	Y/Y/Y	Y/Y/Y			
Blinds/curtains	Y/Y/Y	Y/Y/Y			
Fans/light fittings	Y/Y/Y	Y/Y/Y			
Floor/floor coverings	Y/Y/Y	Y/Y/Y			
Power points	Y/Y/Y	Y/Y/Y			
Coat hooks	Y/Y/Y	Y/Y/Y			

Lounge room

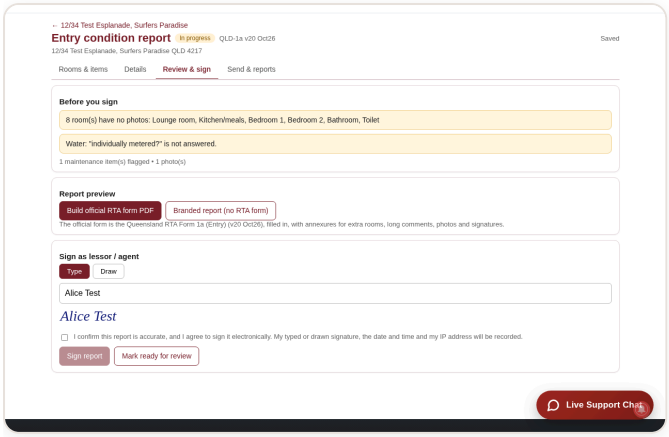
Item	Entry C/U/W	Exit C/U/W	Entry comment	Exit comment	Changed
Doors/walls/ceiling	Y/Y/Y	Y/Y/Y			
Windows/screens	Y/Y/Y	Y/Y/Y			
Blinds/curtains	Y/Y/Y	Y/Y/Y			
Fans/light fittings	Y/Y/Y	Y/Y/Y			
Floor/floor coverings	Y/Y/Y	Y/Y/Y			
TV/power points	Y/Y/Y	Y/Y/Y			
Air conditioner	Y/Y/Y	Y/Y/Y			

ILLUSTRATIVE Figure 90. The entry vs exit comparison annexure in an exit report PDF (demo data).

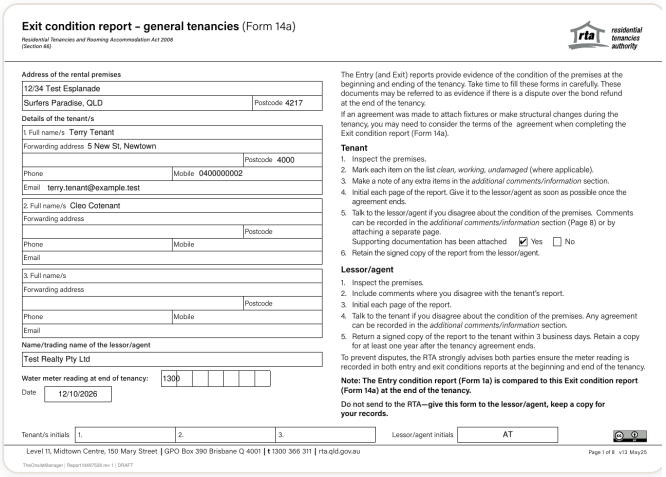
⚠️ Differences are indicators only. Fair wear and tear and the tenancy agreement must be considered before you claim anything from the bond. The comparison does not decide a dispute.

25.9 Review, the official RTA form and signing

1. Open **Review & sign**. The yellow **Before you sign** list shows anything that looks incomplete, for example rooms without photos or an unanswered water question. These are warnings: they don't stop you, but fix them if you can.
2. Choose **Build official RTA form PDF** to preview the filled-in Queensland form (Form 1a for entry, Form 14a for exit). Annexures at the back hold extra rooms, long comments, photos, the comparison (exit) and the signatures. **Branded report (no RTA form)** builds a TheOnsiteManager-styled version instead.
3. Under **Sign as lessor / agent**, **Type** your name or **Draw** your signature.
4. Tick the declaration ("I confirm this report is accurate, and I agree to sign it electronically…") and choose **Sign report**.



STAGING BUILD · DEMO DATA Figure 91. Review & sign: warnings, the RTA form preview buttons and your signature.



ILLUSTRATIVE Figure 92. Page 1 of a filled-in RTA Form 14a (exit) with demo data.

When you sign, your typed or drawn signature, the date and time and your IP address are recorded. Once you sign, the report is **locked** (25.13).

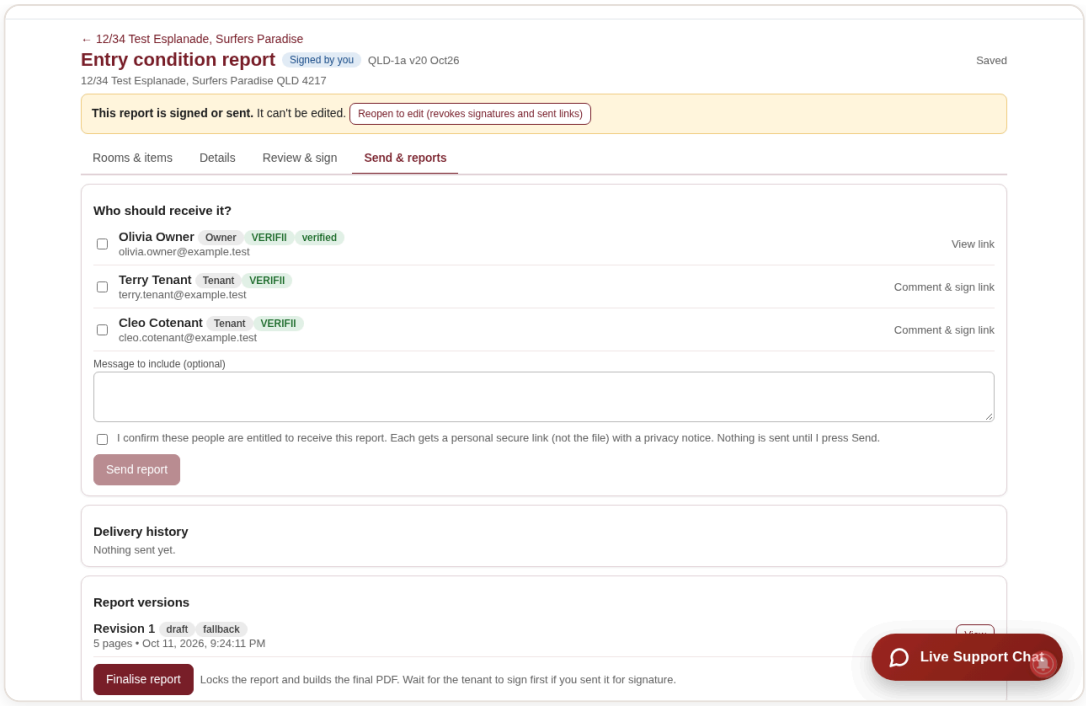
Keep the time limits in mind (Queensland)

Entry: give the report to the tenant at the start of the tenancy; the tenant returns it within 7 days, and you return the final copy within 14 days. Exit: return a signed copy within 3 business days. Keep reports at least 1 year after the tenancy ends. The app shows these as reminders, not legal advice.

25.10 Sending to owners and tenants

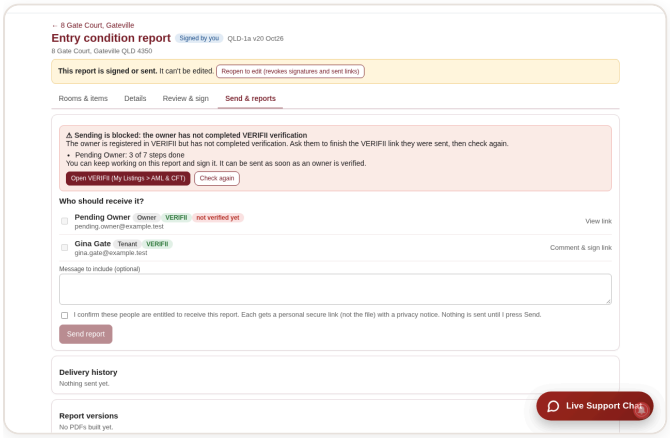
Open **Send & reports**. You must have signed the report first.

1. Under **Who should receive it?**, tick the people to send to. Each shows a role (Owner or Tenant), where the details came from (VERIFII or Manual) and, for owners, *verified* or *not verified yet*.
2. Owners receive a **View link** (view and download only). Tenants receive a **Comment & sign link**.
3. Add an optional message (up to 600 characters).
4. Tick the confirmation: "I confirm these people are entitled to receive this report. Each gets a personal secure link (not the file) with a privacy notice. Nothing is sent until I press Send."
5. Choose **Send report**. The **Delivery history** then shows each link, its status and when it was first opened.

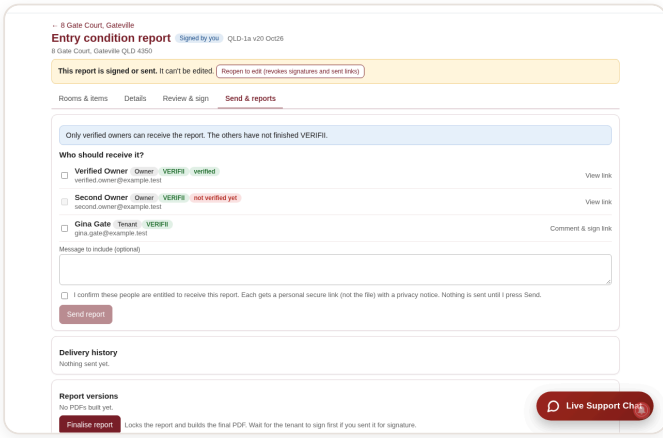


STAGING BUILD · DEMO DATA Figure 93. Send & reports with a verified owner and two tenants, before anyone is ticked.

If you see the red **Sending is blocked** box, the owner hasn't completed VERIFII, isn't registered, or VERIFII couldn't be reached. Use **Open VERIFII (My Listings > AML & CFT)**, then **Check again**. You can keep working and sign the report in the meantime.



STAGING BUILD · DEMO DATA Figure 94. Sending blocked: the owner has done 3 of 7 VERIFII steps.



STAGING BUILD · DEMO DATA Figure 95. Two owners, one verified: sending is allowed, but only to the verified owner.

- **Nothing is ever sent automatically.** Emails go only when you press Send.
- Emails contain a secure, personal link, not the PDF. Links expire after 14 days.
- You can **Withdraw link** at any time in the Delivery history. Sending again to the same person replaces their old link.
- Unsuccessful applicants never appear as recipients. Only the tenants you selected do.
- Routine inspection reports are not sent to tenants in the standard set-up, because they often contain comments meant for the owner.

25.11 Privacy and consent

Condition reports contain personal information about the tenancy. THE Inspection Manager is built so that you share it only deliberately:

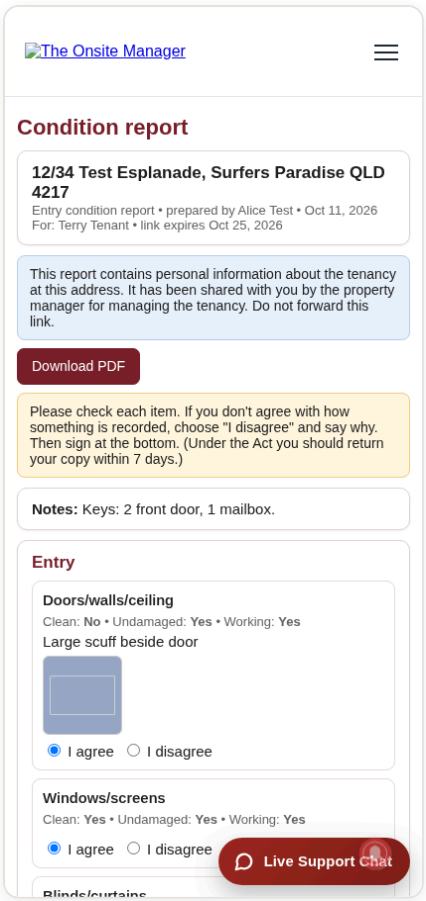
- You must tick the **privacy confirmation** before anything is sent (25.10). Send is disabled until you do.
- Every email includes a privacy notice explaining that the report contains personal information about the tenancy, shared by the property manager for managing it, and that the contact details come from the VERIFII record for the property. It asks the recipient not to forward the link.
- Only contact details (name and email) are taken from VERIFII. Identity documents and verification results are never read into or shown in the report.
- Each link works only for the person it was sent to. Every send, open and signature is recorded in the report's audit trail.
- Reports and photos are kept for **7 years**. Reports can't be deleted on request during that time, because they are evidence if there is a dispute.

⚠️ Never forward a report link, post a report on social media, or share tenant photos outside the tenancy. If a link may have gone to the wrong person, withdraw it straight away (25.10) and tell support through Live Support Chat.

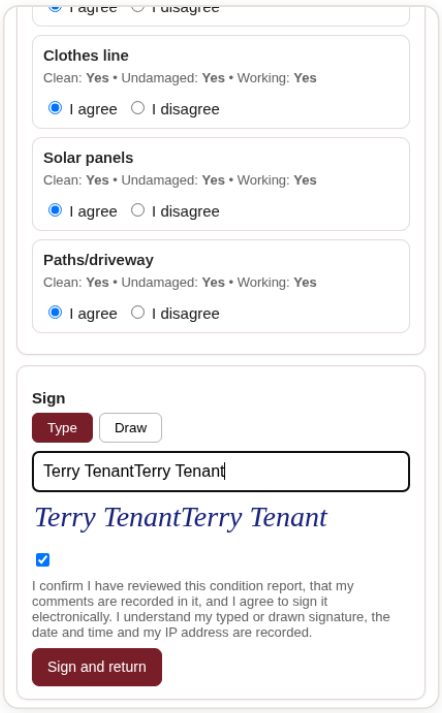
25.12 The tenant signs through a link

The tenant receives an email with a private link. They don't need an account. On the link page they can:

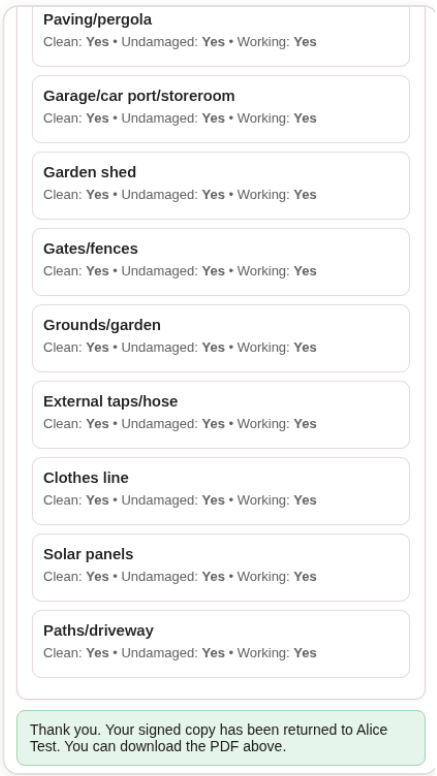
1. read the whole report and download the PDF;
2. for each item choose **I agree**, or **I disagree** and say why;
3. on an exit report, add their forwarding address and contact details;
4. type or draw their signature, tick the declaration, and choose **Sign and return**.



STAGING BUILD · DEMO DATA Figure 96. The tenant's link page on a phone.

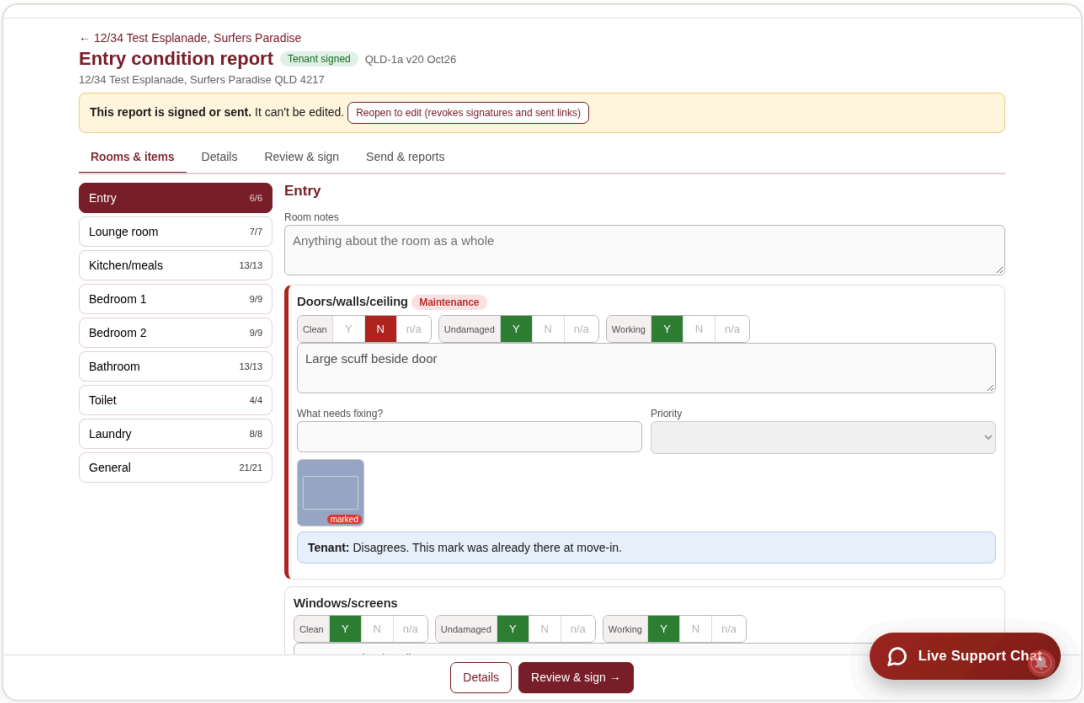


STAGING BUILD · DEMO DATA Figure 97. The tenant signs at the bottom.



STAGING BUILD · DEMO DATA Figure 98. Confirmation after signing.

Back in the report you'll see the status change to **Tenant signed**, and each comment appears under the item, for example "Tenant: Disagrees. This mark was already there at move-in."



STAGING BUILD · DEMO DATA Figure 99. You see the tenant's comment under the item, and the report status shows Tenant signed.

💡 If the tenant disagrees with something, talk to them. If you agree, record it in the general notes before you finalise. Never change the tenant's comments; they are part of the record.

ℹ️ The tenant should return the entry report within 7 days. If their link has expired (after 14 days), send it again to create a new link.

25.13 Locking, reopening and finalising

Status	What you can do
In progress	Edit everything.
Signed by you / sent / Tenant signed	The report is **locked**: "This report is signed or sent. It can't be edited." To change it, choose **Reopen to edit**. Reopening **cancels all signatures and withdraws every link sent**, so you must sign and send again.
Final	After everyone has signed, choose **Finalise report** on Send & reports. This builds the final PDF and locks the report permanently. A finalised report **can't be reopened**; if something is wrong, start a new report.

Every PDF you build is kept under **Report versions** (Revision 1, 2, 3…), marked *draft* or *final*.

⚠️ Wait for the tenant to sign before you finalise if you sent the report for signature. Once finalised, the tenant can no longer sign it.

25.14 Tips

- Register the owner in VERIFII when you take on the property, not on moving day.
- Ask every applicant to apply through VERIFII so tenant details flow in automatically.
- Use **All Yes** for rooms in perfect order, then change only the exceptions.
- Take at least one photo per room. Photograph problems close up, then mark them up.
- Keep comments short and factual: what, where and how big ("2 cm chip, front-left of bench near sink").
- Preview the official form before you sign, and check the Details tab (water meter, keys).
- On a phone, use your keyboard's microphone to dictate comments.
- Build the exit report from the entry report, so the comparison is automatic.

25.15 Troubleshooting

Problem	What to do
I can't see the button	It appears only on **rental** and **real estate** listings in My Listings (25.3). Commercial listings don't have it.
"Sending is blocked"	The owner is missing or hasn't completed VERIFII. Register or remind the owner (25.4), then press **Check again**. You can keep working and sign in the meantime.
No owner shown	Register the owner with VERIFY OWNER / VERIFY VENDOR, then **Refresh from VERIFII**. Owners can't be added by hand.
Owner shows "not verified yet"	They haven't finished every VERIFII step. Check their progress on the VERIFY OWNER button and resend the link (Chapter 18).

Tenant not listed	The tenant must have applied through VERIFII for this listing. Copy and send the VERIFII application link, or add the tenant manually with a reason (25.4).
"VERIFII could not be reached"	Wait a moment and press **Check again**. Sending stays blocked until the owner's status can be confirmed.
I can't edit the report	It's signed or sent, so it's locked. Choose **Reopen to edit** (this cancels signatures and links). A **final** report can't be reopened; start a new one (25.13).
The Send button stays grey	Sign the report first, tick at least one recipient and tick the privacy confirmation. Check each recipient has a valid email.
The PDF looks empty in my viewer	Use the preview in the app, or download it and open it with Adobe Reader. Some browser viewers don't show filled form fields.
The tenant says the link has expired, or "This link is not valid"	Links last 14 days and stop working if withdrawn or replaced. Send the report again to create a new link.
A photo won't upload	Check your connection. Photos must be under 15 MB; a report holds up to 600 photos.
"Access refused" when opening a report	You can only open reports for your own listings. Make sure you're signed in to the right account.

25.16 FAQ

Q. Does it cost anything?

No. It is free for all LITE and FULL managers during the beta.

Q. Can I do the inspection before the owner is verified?

Yes. You can create, fill in and sign the report. Only sending waits for a verified owner.

Q. Why can't I just type in the owner's email?

Owners must be identified through VERIFII (CDD) before their property's records are sent. That protects you, the owner and the tenant.

Q. Is it the official RTA form?

Yes, for entry (Form 1a) and exit (Form 14a) in Queensland. The app fills in the official form and attaches extra rooms, photos and signatures as annexures. Routine inspections use a TheOnsiteManager template, because there's no official RTA routine form.

Q. Is the tenant's electronic signature valid?

The app records the typed or drawn signature, the declaration, the date and time and the IP address. If the tenant prefers paper, or there is any doubt about consent to electronic documents, also give them a printed copy.

Q. Do owners have to sign?

No. Owners receive a view and download link only.

Q. Can I send a routine report to the tenant?

Not in the standard set-up. Routine reports go to the owner.

Q. Where are the reports kept, and for how long?

In the listing's Inspection hub, for 7 years. The history stays with the property even when tenants change.

Q. Can I use it for a property outside Queensland?

Not yet. The forms are Queensland forms.

25.17 Reporting a bug or giving feedback

Because THE Inspection Manager is in beta, your feedback shapes it. Use **Live Support Chat** (bottom right of every page, Chapter 22):

1. Start your message with **"Inspection Manager:"**.
2. Give the **Listing ID**, the report type (entry, exit or routine) and which tab you were on.
3. Say what you did, what you expected and what happened. Copy any error message exactly.
4. Attach a screenshot if you can, but **crop or cover tenant and owner names, emails, phone numbers and signatures** first.

⚠️ Never paste a report link in the chat. It is personal to the tenant or owner. Describe the problem instead.

25.18 What's coming

These are planned and not available yet. No dates are promised, and plans can change (see also Chapter 26):

- **Form builder:** create your own inspection templates (rooms, items and wording) for your complex or agency.
- **Lease signing:** sending a lease for electronic signing alongside the inspection reports.

Until then, use the standard Queensland templates for entry and exit, the TheOnsiteManager routine template, and prepare leases in The Form Manager as described in 15.9.

CHAPTER 26

Proposed and upcoming features

Documented work in progress. Nothing here is available yet unless stated, and no dates are promised.

⚠️ **Please read**

This chapter lists only items documented in current project notes and support guidance. Plans change. Don't tell owners or applicants that a feature is coming. Use what is available today, as described in Chapters 2–25.

💡 **Now available**

THE Inspection Manager (entry, exit and routine condition reports with the official Queensland RTA forms and tenant e-signing) is now available to all LITE and FULL managers as a free beta. It is no longer a planned item; see Chapter 25.

Item	Status (Oct 2026)	What it would mean for you	Until then
THE Inspection Manager: form builder	Planned	Build your own inspection templates (rooms, items and wording).	Use the standard templates (25.5).
THE Inspection Manager: lease signing	Planned	Send a lease for electronic signing alongside the inspection reports.	Generate the Form 18a lease in the Form Manager and send it for free e-signing (Chapter 27).
TheOnsiteManager mobile app (iOS and Android)	Proposal under consideration	A dedicated app for listings, applications, enquiries, chat and notifications on your phone.	Use the website on your phone, and add it to your home screen (1.4).

26.1 How to suggest an improvement

Send your idea through Live Support Chat, starting with "Suggestion:". Describe the problem you're trying to solve, not only the feature. That helps the team prioritise.

CHAPTER 27

The Form Manager

Official forms, filled in from the details you already hold, with free electronic signing.

In this chapter

- What the Form Manager is, who can use it and how to open it
- The forms available and where each one gets its details
- Filling in, previewing, saving and downloading a form
- Sending a form for free electronic signing, and cancelling a signing
- Archiving, restoring and duplicating documents (nothing is ever deleted), and making the bond lodgement form from a lease
- Importing your existing paperwork: PDFs, scans and photos of paper forms
- Your **historical realworks** folder
- Address autocomplete, the audit trail, troubleshooting and FAQ

27.1 What the Form Manager does

The Form Manager is TheOnsiteManager's own forms system: a lite alternative to RealWorks for the official forms onsite managers use most. Instead of downloading a blank PDF and retyping details, you:

1. choose a form;
2. choose where the details should come from (a VERIFII application, a TheOnsiteManager listing, an Inspection Manager inspection, or your own account);
3. check and complete every field, page by page;
4. preview the official PDF;
5. save and download it, or send it for electronic signing.

Each form uses its own field map for that exact official PDF version, so details land in the right box on the current version of the form.

> **Note**
> The Form Manager only *reads* VERIFII, listing and inspection data. It never changes the original records. The one exception is **Add tenants to CRM** (27.12): it adds a lease's tenants to your own listing and CRM, and only after you have checked the changes and confirmed.

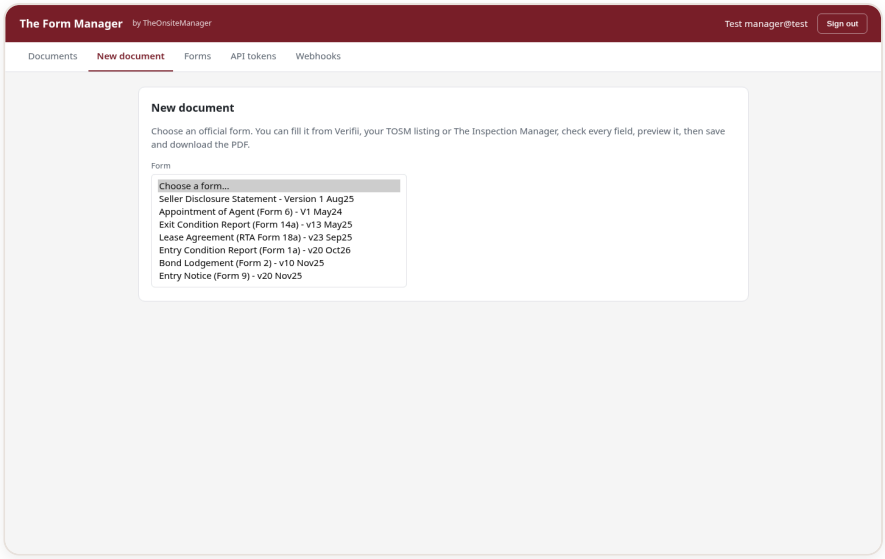
27.2 Who can use it and what it costs

- **All managers on a current LITE or FULL plan.** You don't need RealWorks.
- It is **free**, including electronic signing. There is nothing to buy or switch on.
- Sign in with your normal TheOnsiteManager email and password. There is no separate account.
- You can only fill in forms from **your own** listings, applications and inspections. Another manager's reference returns "not found".

27.3 Opening the Form Manager

1. In the Control Panel, find the **The Form Manager** card under **Forms & Paperwork**.
2. Select **FORMS AND PAPERWORK**. The Form Manager opens already signed in.
3. Or go to **forms.theonsitemanager.com.au** and sign in with your TheOnsiteManager email and password.

The Form Manager has these tabs: **Documents**, **New document**, **Import PDFs** (27.10) and **Forms**. (**API tokens** and **Webhooks** are for software integrations only. Most managers never need them.)



STAGING BUILD · DEMO DATA Figure 100. The Form Manager: New document, choosing a form.

27.4 The forms available

Form	What it's for	Fill from
RTA Form 22 Rental application	A compliant rental application for each applicant	A VERIFII application
RTA Form 18a General tenancy agreement	The lease	A VERIFII application or a TheOnsiteManager listing
RTA Form 9 Entry notice	Notice to enter the property	A TheOnsiteManager listing or a saved lease
RTA Form 1a Entry condition report	Condition at the start of a tenancy	An Inspection Manager inspection
RTA Form 14a Exit condition report	Condition at the end of a tenancy	An Inspection Manager inspection
Form 6 Appointment of agent	Appointing the agency to sell or let (Property Occupations Act 2014)	A TheOnsiteManager listing or your TheOnsiteManager details
RTA Form 2 Bond lodgement	Lodging the bond (paper form)	A VERIFII application or a TheOnsiteManager listing
Form 2 Seller disclosure statement (Property Law Act 2023)	Disclosure to buyers before they sign	A TheOnsiteManager listing

Form	What it's for	Fill from
RTA Form 11 Notice to remedy breach	Telling a tenant to fix a breach of the agreement	A TheOnsiteManager listing, a saved lease, or a TAM tenancy reference
RTA Form 12 Notice to leave	Ending a tenancy on a valid ground (for example an unremedied breach)	A saved Form 11, a TheOnsiteManager listing, a saved lease, or a TAM tenancy reference
RTA Form 13 Notice of intention to leave	The tenant giving notice that they are leaving	A TheOnsiteManager listing, a saved lease, or a TAM tenancy reference
Notice of Rent Increase (Queensland)	Telling the tenant(s) about a rent increase, for general tenancies and rooming accommodation. There is no official RTA form; this notice is built to the Residential Tenancies and Rooming Accommodation Act.	A TheOnsiteManager listing, a saved lease, or a TAM tenancy reference
RTA Form R18 Rooming accommodation agreement	The agreement for a resident renting a room	A VERIFII application, a TheOnsiteManager listing or a saved lease

Note

The **Notice of Rent Increase** checks the dates for you: the new rent must be higher than the current rent, and the date it is payable from must be far enough after the notice is given (at least 2 months for a general tenancy, 4 weeks for rooming accommodation). If a date is too early, the form tells you what to fix before you can save.

Warning

These are **Queensland** forms. Don't use them for properties in other states. The form version (for example "v4 Mar26") is shown on the **Forms** tab and stored with every document.

27.5 Where the details come from

Fill from	What you enter	What it fills in
VERIFII application	The VERIFII application reference	Applicant names, contact details, address history, employment, references and the submission date
TheOnsiteManager listing ID	The 8-digit Listing ID from My Listings	Property address, rent, bond and listing details. Once you have used **Add tenants to CRM** (27.12), also the current tenants and lease dates
A lease saved in The Form Manager	Nothing to type: choose the lease from the list (27.13)	Premises, tenant names and contact details, lease dates, rent and bond from that lease. Your own details as the agent or issuer
Inspection Manager inspection ID	The inspection ID from the Inspection hub (25.3)	Room-by-room condition, items and comments
My TheOnsiteManager details	Nothing: it uses your account	Your name, agency, licence and contact details

Anything the source doesn't hold is left **blank** for you to complete. The Form Manager never guesses.

27.6 Filling in a form, step by step

1. Open the **New document** tab.
2. In **Choose a form...**, pick the form.
3. In **Fill from**, choose the source, enter the reference (27.5), then choose **Fill in**. A message shows how many fields were filled.
4. Work through the fields **page by page**. Check every pre-filled value and complete any blanks.
5. Choose **Preview PDF** to see the official form exactly as it will print.
6. When you're happy, choose **Save and download PDF**. The document is saved to your **Documents** tab and downloaded.

> 💡 **Tip**
> Always preview before you save. The preview is the official PDF with your details, so what you see is what the tenant or owner gets.

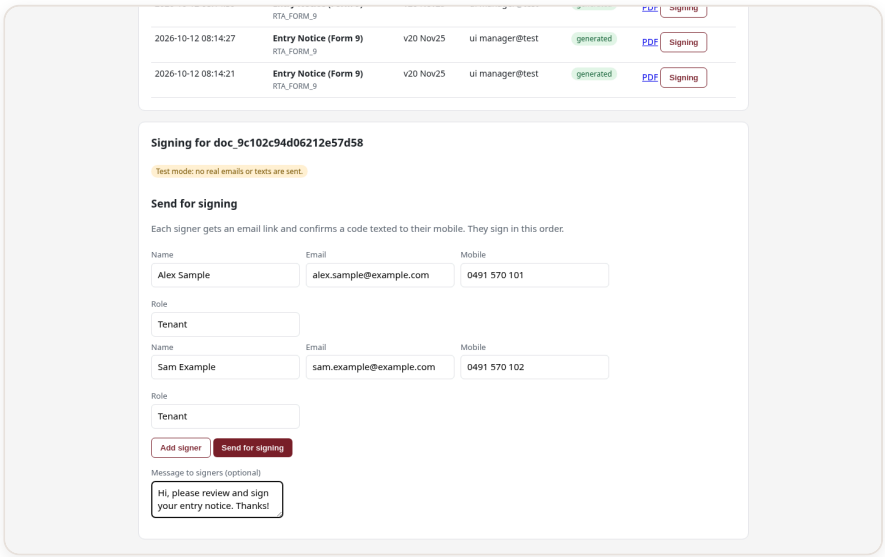
27.7 Address autocomplete

Every address on every form has **address autocomplete**.

1. Start typing the street address.
2. Choose the right address from the suggestions (Australian addresses only).
3. The street, suburb, state and postcode are filled in for you.

If no suggestions appear (for example, a brand-new street), just type the address into the fields. Typing errors in addresses are one of the most common causes of rejected paperwork, so use the suggestions wherever you can.

27.8 Free electronic signing



STAGING BUILD · DEMO DATA Figure 101. Sending a saved document for free electronic signing.

Every form can be signed electronically at **no cost**. You don't need DocuSign or any other paid service.

Sending for signing

1. Open the **Documents** tab and select the document.
2. In the **Signing** panel, choose **Add signer** for each person. Enter their name, email and mobile.
3. Add a **Message to signers (optional)**.
4. Choose **Send for signing**. Each signer receives a private link.

What the signer sees

1. **Confirm it's you:** they choose **Text me a code** and enter the 6-digit code sent to their mobile.
2. **Read the document:** the full PDF, which they can also open in a new tab.
3. **Sign:** they **Draw** or **Type** their signature, then choose **Sign document**.

When everyone has signed, choose **Download the signed PDF**. The signed copy includes a record of who signed and when. To stop a signing that's in progress, choose **Cancel signing** on the document. The signers' links stop working, the request shows as **cancelled**, and the document goes back to **Generated**, so you can correct it if needed and send it for signing again.

> ℹ️ **Note**
> Check the mobile number carefully. The code goes only to the number you enter. If a signer didn't get it, they can choose **Send again**.

27.9 Archiving, restoring and duplicating documents

Documents are **never deleted**. To tidy your **Documents** list, you archive a document instead. Archiving only hides it from the list: the PDF, any signed copy and the audit trail are all kept.

1. On the **Documents** tab, choose **Archive** on the document's row (or open the document and choose **Archive**).
2. Confirm. The document disappears from your list.
3. To see archived documents, tick **Show archived** above the list. Archived documents show an **archived** label.
4. To bring one back, choose **Restore**. It returns to your Documents list exactly as it was.

> ℹ️ **Note**
> You can't archive a document while it is out for signing. You'll see "This document is out for signing. Cancel signing first, then archive it." Cancel the signing (27.8), then archive.

Duplicate makes a new draft with the same details as a saved document, so you can reuse them (for example to renew a lease with the same tenants, or for a similar tenancy). The original is not changed.

1. On the **Documents** tab, choose **Duplicate** on the saved document's row (or open it with **View** and choose **Duplicate**).
2. A new draft opens. Signatures, initials, signing dates and signing status are **not** copied.
3. Change what is different (for example the new lease dates and rent), then choose **Save draft** or **Save and download PDF**.

Bond lodgement form from a lease. Every saved **RTA Form 18a** lease on the **Documents** tab has a **Bond lodgement form** link. It opens a new **RTA Form 2** already filled in from that lease, so you don't retype the

tenants, address or bond. Check it, then save it as usual.

27.10 Importing PDFs and photos of your existing forms

Already have leases and notices from before you used the Form Manager? Use the **Import PDFs** tab to turn them into drafts on the latest version of the form, so you can check them, save them and reuse them (Duplicate, Bond lodgement form) without retyping.

What you can import

- **Forms:** Form 18a lease, Form R18, Form 9 entry notice, Form 11, Form 12, Form 13 and Notice of rent increase.
- **PDFs** filled in on screen, printed to PDF (including from Realworks or DocuSign), or scanned. Up to 200 files at a time, 20 MB each.
- **Photos of a paper form:** JPG, PNG or HEIC (iPhone) photos, one photo per page. Up to 30 photos go into one document, 20 MB each.

Importing PDFs

1. Open the **Import PDFs** tab.
2. Drag your files onto **Drop PDFs or photos here**, or choose **Choose PDFs or photos**. You can choose many PDFs at once: each PDF becomes its own draft.
3. Wait a minute or two. The page updates by itself. Each file shows a status: **Waiting**, **Reading...**, then **Ready to check** or **Needs checking**. **Not supported** means it isn't one of the forms above; **Failed** means it couldn't be read (choose **Try again**); **Already imported** means you uploaded the same file before.
4. Choose **Review**. The draft opens with the details filled in. Fields that need checking are **highlighted in yellow** (hover over one to see why). Choose **Show original alongside** to compare with your file.
5. Correct anything that's wrong, then choose **Save draft** or **Save and download PDF**. If you don't want it, choose **Discard** on the Import PDFs tab: the draft is archived, never deleted.

Importing photos of a paper form

1. Photograph each page **flat, straight and in good light**, filling the frame. One photo per page.
2. On the **Import PDFs** tab, choose **Choose PDFs or photos** and pick all the photos for the form (or drop them on the box).
3. The photos are listed as **Page 1**, **Page 2** and so on. Use the up and down arrows to put them in page order.
4. Choose **Upload as one document** to make one form from all the pages, or **Upload each photo as its own document** if each photo is a separate one-page form.
5. The photos are turned into a PDF on our own server (turned the right way up automatically) and read like a scan. Then follow steps 3 to 5 above.

⚠️ **Check every field**

Scans and photos are read with text recognition, which can mix up letters and numbers (for example 0 and O, 1 and l). Every value read from a scan or photo is marked for checking. Always compare the draft with the original before you save it.

ℹ️ **Note**

Signatures, initials and signing dates are **never** copied, so the saved document needs to be signed again (27.8). Importing never sends anything to anyone.

Reading forms with AI (optional). If you see **Use AI for forms we can't read on our own**, you can tick it for older versions of a form, other agencies' layouts and unclear scans. Only those files are sent to xAI (Grok), which processes them in the USA. AI-read fields are always highlighted for you to check. Leave it unticked if you don't want this.

Privacy and how long files are kept. Uploaded files are stored encrypted and only your account can see them. The uploaded original is removed 30 days after you save or discard the draft, and after 90 days at the most. Your saved document is kept. You can remove an original sooner with **Remove original**; the draft or document stays.

27.11 Your historical realworks folder

If you used Realworks, TheOnsiteManager may have brought your old Realworks forms across for you. They are in a folder called **historical realworks**.

1. Open the **Documents** tab.
2. Choose the 📁 **historical realworks** button above the list.
3. Every original PDF is listed. Choose **View original** to open it.
4. Where the form is one the Form Manager can fill (27.10), there is also a draft on the latest version of the form. Its status shows **Draft on the latest form (check it)**. Choose **Open draft**, check it against the original, then save it. Once saved it shows **Saved on the latest form**.
5. Other files show **Original only**: the original is kept for your records, but there is no draft.
6. Choose ← **Documents** to go back.

Only your account can see this folder. Nothing in it has been sent to anyone. The originals in this folder are kept: they are not removed after 30 or 90 days like other imports.

27.12 Adding a lease's tenants to your listing and CRM

When you have a lease in the Form Manager (one you generated, a draft, or one you imported in 27.10), you can copy its tenants to your TheOnsiteManager listing and your CRM. You then don't need to retype them for entry notices, breach notices and other forms.

1. On the **Documents** tab, open the Form 18a lease.
2. Choose **Add tenants to CRM**. The tenants, premises, lease dates, rent and bond read from the lease are shown.

3. Under **Which listing is this lease for?**, choose the listing. Your listings at the lease's address are suggested. If yours isn't shown, choose **Another listing: Listing ID** and enter its 8-digit Listing ID.
4. Under **Is this the current lease?**, choose **current** or **past**. For a current lease, the listing's current tenant and lease dates are updated. A past lease keeps the tenants on file as past tenants and doesn't change the current tenant.
5. For a current lease you can tick **These are the only current tenants: mark any other tenants on the listing as no longer current (they are kept on file)**. Tick **Also change the listing's advertised rent and bond to the lease amounts** only if you want your advertised rent and bond to change too. It is unticked unless you tick it.
6. Choose **Check changes**. A table shows each change, with the value now and the value after. Nothing has been written yet.
7. Choose **Write to CRM** and confirm. You'll see **Done** and the number of changes written.

> ℹ️ **Note**
>
> **Tenants only.** Owners and lessors are never added: they come from VERIFII. Tenants who are already on the listing or in your CRM are updated, not added twice. A tenant without an email address is added to the listing but not as a CRM contact. You can only write to your own listings. Your listing's status and your payments are never changed, and nothing is sent to anyone.

> ℹ️ **Note**
>
> Every write is logged. If something was written to the wrong listing, contact support and quote the reference shown after **Done**: it can be undone.

27.13 Filling other forms from a lease

You can fill an entry notice (Form 9), a notice to remedy breach (Form 11), a notice to leave (Form 12), a notice of intention to leave (Form 13), a Notice of Rent Increase or a rooming accommodation agreement (Form R18) straight from a saved lease.

1. Open the **New document** tab and choose the form.
2. In **Fill from**, choose **A lease saved in The Form Manager**.
3. Choose the lease from the list. Each lease shows the premises, tenants and dates, and is marked **imported** or **draft** where that applies.
4. Choose **Fill in**. The premises, tenants, lease dates, rent and bond are filled in where the form has room for them. Your own name, licence and contact details are used as the agent or issuer.
5. Check every field, complete the rest, then save.

Once you have used **Add tenants to CRM** (27.12), choosing **TheOnsiteManager listing ID** in **Fill from** also fills in the listing's current tenants and lease dates.

27.14 The audit trail

The Form Manager keeps an **audit trail** of every document: when it was created, saved, downloaded, archived and restored, and for signing, when it was sent, opened and signed by each person. Open a

document on the **Documents** tab and look under **Audit trail** and **Events**.

> **Note**
> Times in the audit trail are shown in **UTC**. Queensland time is UTC+10.

27.15 Troubleshooting

Problem	Likely cause	What to do
"This version is waiting for approval, so it can only be previewed."	A new form version has not yet been approved by TheOnsiteManager.	You can preview but not save. Ask Live Support Chat.
A reference returns nothing	It belongs to another manager's listing, or was typed wrongly.	Check the Listing ID, VERIFII reference or inspection ID.
Some fields are blank	The source didn't hold that detail.	Type it in before you save.
No address suggestions	New or unusual address, or suggestions blocked by your browser.	Type the address in manually.
"E-signing is switched off at the moment."	Signing is temporarily paused.	Download the PDF and try again later, or ask Live Support Chat.
"That file is not a PDF."	You uploaded a file type that can't be imported.	Upload a PDF, or a JPG, PNG or HEIC photo (27.10).
A photo upload says it is not a JPG, PNG or HEIC photo	The file is another type (for example a screenshot saved as WEBP or a Word file).	Save it as a PDF or JPG and upload it again.
"Listing not found or not yours."	The Listing ID is wrong, or the listing belongs to another account.	Check the 8-digit Listing ID on My Listings and try again.
"Something changed since you checked. Please check the changes again."	The listing or CRM changed after you chose **Check changes**.	Choose **Check changes** again, then **Write to CRM**.
"Please open The Form Manager again from your control panel, then try again."	Your TheOnsiteManager sign-in has expired.	Open The Form Manager again from your control panel. Nothing was written.
No leases in the list under **A lease saved in The Form Manager**	There is no Form 18a lease in your account yet.	Generate a lease, or import one (27.10), then try again.
Many fields are highlighted on an imported draft	It was read from a scan or photo, or from an older version of the form.	Compare each field with the original (**Show original alongside**) and correct it before you save.
Signer didn't get the code	Wrong mobile number, or SMS delay.	Check the number; the signer can choose **Send again**.

27.16 FAQ

Is the Form Manager really free? Yes, for every manager on a current LITE or FULL plan, including electronic signing.

Do I still need RealWorks? Not for leases, notices and the other forms in 27.4: prepare those in the Form Manager, free on LITE and FULL. FULL plan managers can keep using RealWorks for the other REIQ forms it provides.

Can I change VERIFII data from the Form Manager? No. It only reads VERIFII. Changes you make in a form stay in that document.

Can I use it outside Queensland? Not yet. The forms are Queensland forms.

Where are my saved forms? On the **Documents** tab, with the source and version used. Archived forms are under **Show archived**.

Can I bring in my old leases? Yes. Upload the PDFs, scans or photos on the **Import PDFs** tab (27.10). Your old Realworks forms may already be in your **historical realworks** folder (27.11).

Does Add tenants to CRM add the owners too? No. Only tenants are added. Owners come from VERIFII (27.12).

Do I need AML/CTF checks for leases? No. AML/CTF checks are only needed for sale contracts. Leases, notices, condition reports and the bond form don't need them.

Can I delete a form? No. Forms are never deleted. Archive it to hide it from your list, and restore it any time (27.9).

CHAPTER 28

Reminders and the notification bell

TheOnsiteManager reminds you when a routine inspection is due, prepares the Entry Notice for you, and tells you when it's time to do the inspection or an exit condition report.

In this chapter

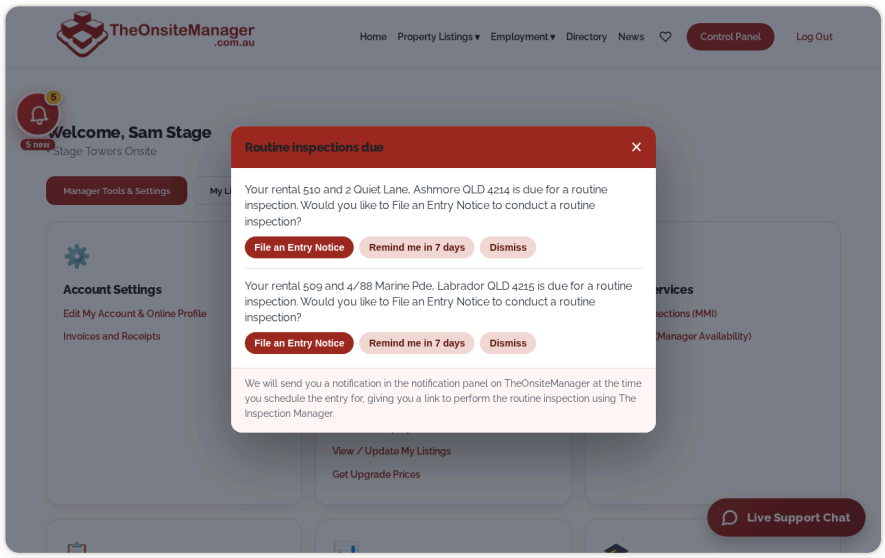
- The routine inspection pop-up you see when you log in
- Filing a pre-filled Entry Notice (RTA Form 9) in The Form Manager
- The reminder 20 minutes before your scheduled entry
- The exit condition report reminder for newly advertised rentals
- The notification bell: what it shows and how to clear it

Screenshots
The screenshots in this chapter come from the test (staging) version with made-up demo data.

28.1 Routine inspection due: the login pop-up

When you log in, TheOnsiteManager checks your rental listings. If you marked a rental as **leased** or **withdrawn** between 80 and 100 days ago, it is due for a routine inspection, and you'll see a pop-up:

> *"Your rental [ID] and [Address] is due for a routine inspection. Would you like to File an Entry Notice to conduct a routine inspection?"*



STAGING BUILD · DEMO DATA Figure 102. The routine inspection pop-up, with one entry for each rental that is due.

For each rental you can choose:

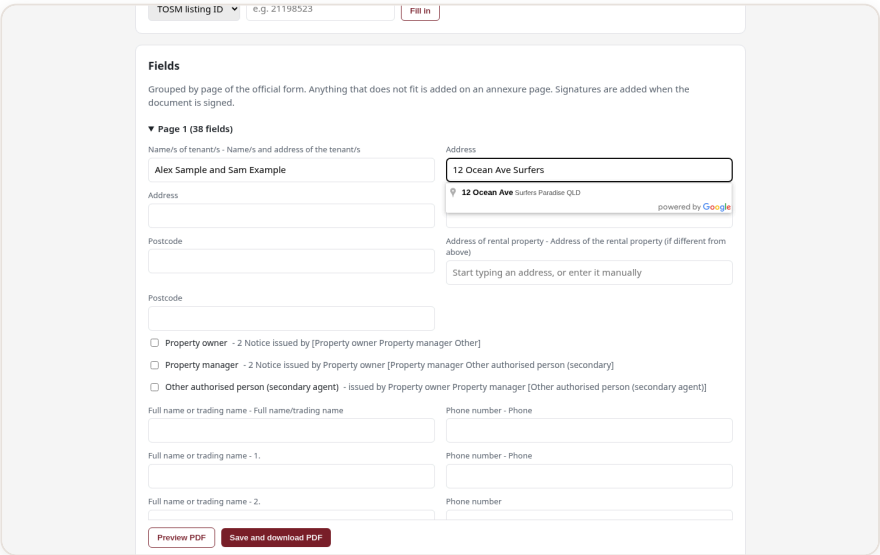
Button	What happens
File an Entry Notice	Opens The Form Manager in a new tab with a pre-filled Entry Notice (28.2).

Remind me in 7 days	Hides this reminder for 7 days. It will appear again after that if you still haven't filed an Entry Notice.
Dismiss	Hides this reminder for this tenancy. You won't be asked again until the rental is leased or withdrawn again.

The same reminder is also added to your **notification panel** (28.5), with a link to file the Entry Notice. You only get one reminder per rental per tenancy, so you won't be nagged every time you log in. If you've already started a routine inspection in THE Inspection Manager, or saved an Entry Notice for that rental, you won't be reminded.

28.2 Filing the Entry Notice (RTA Form 9)

1. Choose **File an Entry Notice**. The Form Manager opens already signed in (Chapter 27), on a new **Entry Notice (RTA Form 9)**.
2. The form is filled in from your listing: the **property address**, the **tenant names** (from VERIFII and the listing), **your details** as the property manager, and the reason for entry ticked as **inspect the premises** (routine inspection).
3. Enter the **date** and **time of entry** (or the two-hour period). Check every field.
4. Choose **Preview PDF**, then **Save and download PDF**, and give the notice to the tenants as the RTA requires. You can also send it for free electronic signing (27.8).



STAGING BUILD · DEMO DATA Figure 103. An Entry Notice (RTA Form 9) in The Form Manager.

> **Notice periods**
> In Queensland a routine inspection needs at least 7 days' written notice, and routine inspections can't be more often than once every 3 months. Check the RTA rules before choosing the entry date.

28.3 The reminder 20 minutes before entry

When you save the Entry Notice, TheOnsiteManager notes the date and time of entry. **20 minutes before the entry time**, a notification appears in your notification panel with a link to **perform the routine inspection in THE Inspection Manager**. The link opens the listing and starts a routine inspection report, or

reopens one you've already started (Chapter 25). If you didn't enter a time, the reminder appears early on the morning of the entry date.

28.4 Exit condition report reminder for new rentals

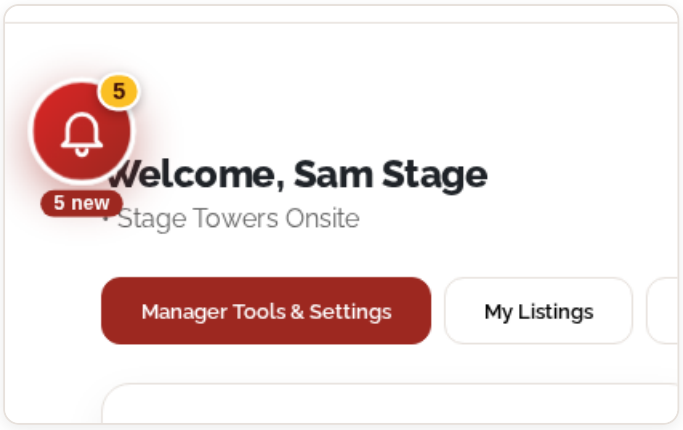
When you advertise a rental, TheOnsiteManager uses the **available from** date on your ad. **7 days before that date** you'll get a notification:

> *"You have just listed [ID]: [address] for rent available from [date] - did you wish to perform an Exit Condition Report using The Inspection Manager?"*

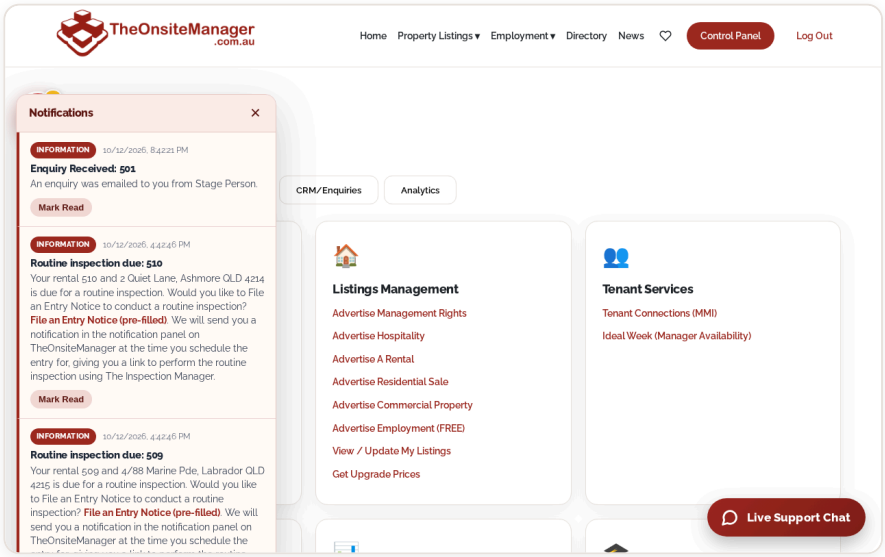
The link starts an **Exit condition report** for that listing in THE Inspection Manager. If you change the availability date, the reminder moves to match. If the listing is leased or withdrawn first, no reminder is sent.

28.5 The notification bell

When you have unread notifications, a large red bell appears at the top left of every page. It pulses, shows a yellow badge with the number of unread notifications, and has a "new" label underneath. Select it to open the notification panel.



STAGING BUILD · DEMO DATA Figure 104. The notification bell with 5 unread notifications.



STAGING BUILD · DEMO DATA Figure 105. The notification panel, including routine inspection reminders with their links.

- Select **Mark Read** on each notification once you've dealt with it. When everything is read, the bell disappears.
- The panel checks for new notifications every few minutes, so scheduled reminders appear without refreshing the page.
- If your device is set to **reduce motion**, the bell doesn't pulse. It shows a steady red ring instead.
- Notifications stay in the panel for 7 days.

28.6 Troubleshooting and FAQ

Question	Answer
I didn't get a reminder for a rental I leased about 3 months ago.	Reminders use the date the listing was marked leased or withdrawn in TheOnsiteManager. For listings marked before October 2026, that date is worked out from the listing's change history, so it can be a little later than the real date. You can always file an Entry Notice yourself in The Form Manager.
I dismissed a reminder by mistake.	File the Entry Notice directly in The Form Manager (Chapter 27). The 20-minute reminder still works.
The Entry Notice opened but the details are blank.	Choose **Fill in** again with your listing ID. Tenant names come from VERIFII and the listing's tenant details. If none are recorded, type them in.
Does TheOnsiteManager send anything to my tenants?	No. Reminders only go to you. You give the Entry Notice to the tenants yourself, or send it for e-signing.

CHAPTER 29

The CRM Calendar

Everything happening at your listings in one monthly calendar: open homes and who came, Entry Notices, lease dates, availability and inspections due.

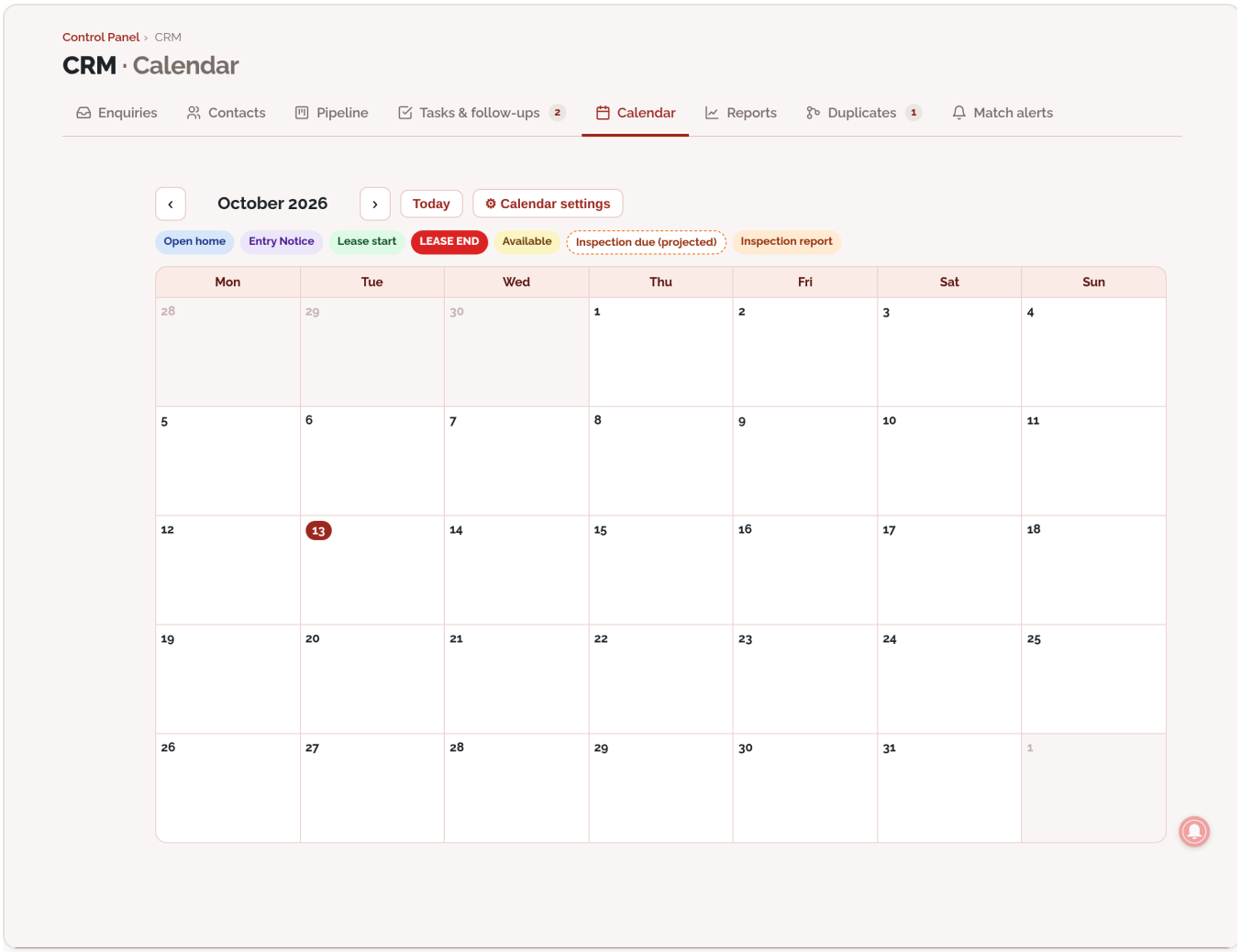
In this chapter

- Opening the CRM Calendar and reading the month view
- What appears on the calendar and where it comes from
- Open homes: who registered and who actually attended
- Linking people to CRM contacts
- Seeing the calendar on your phone or in Google Calendar

ℹ️ **Screenshots**
The screenshots in this chapter come from the test (staging) version with made-up demo data.

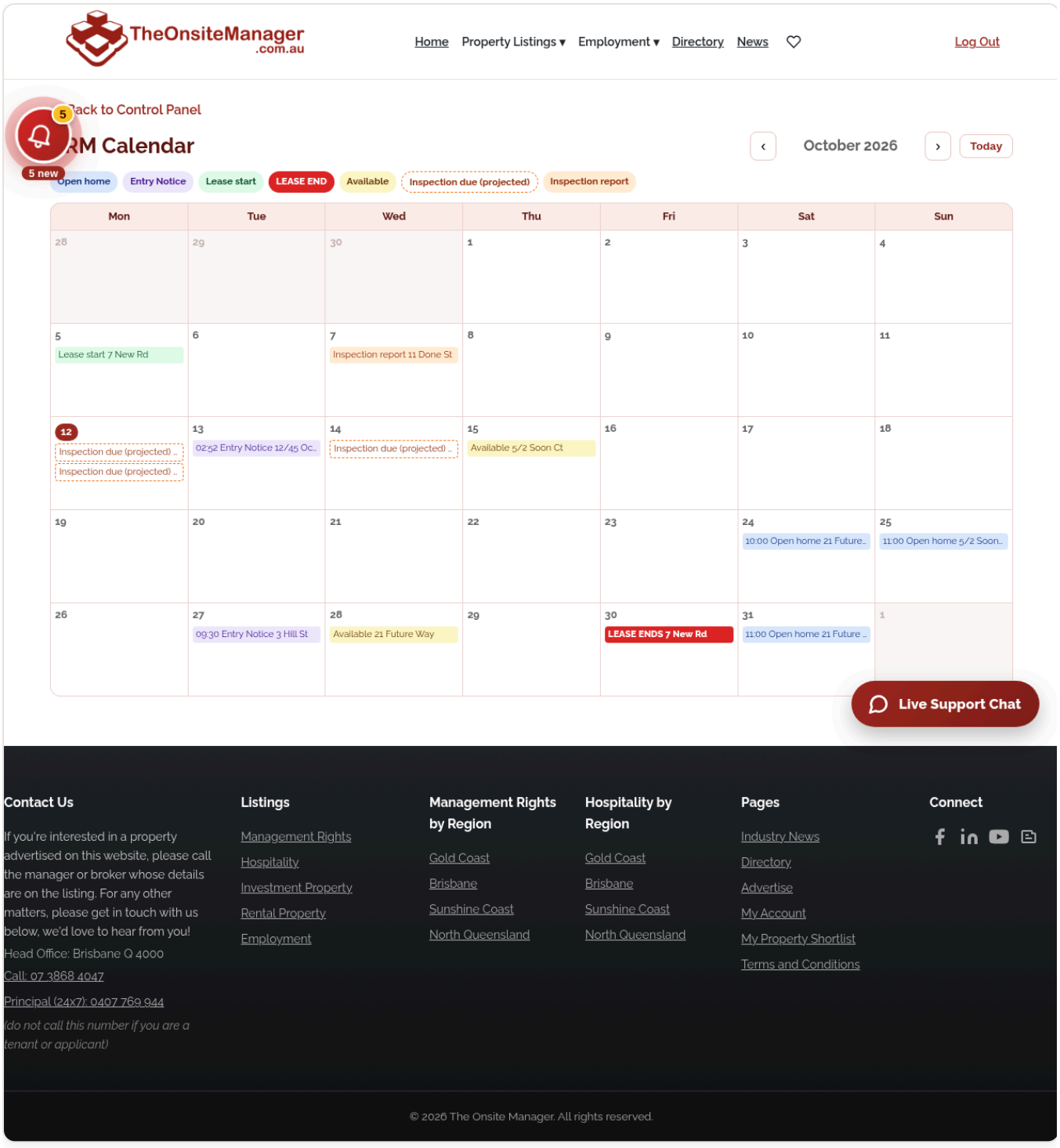
29.1 Opening the CRM Calendar

The calendar is now a tab inside the CRM. In the Control Panel choose **CRM**, then the **Calendar** tab (or go to `theonsitemanager.com.au/crm/calendar`). Old links to the CRM Calendar open this tab.



LIVE UI · DEMO DATA Figure 106. The Calendar tab inside the CRM.

The calendar opens on the current month. Use ‹ and › to change month and **Today** to come back. Select any day to see everything on that day underneath the calendar.

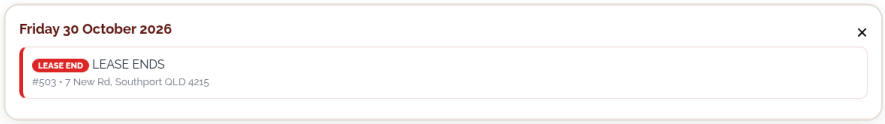


STAGING BUILD · DEMO DATA Figure 107. The month view. Each colour is a different kind of activity.

29.2 What's on the calendar

Entry	Where it comes from
Open home (blue)	The inspection times on your listing (Chapter 9). The numbers show attended / total people.
Entry Notice (purple)	Entry Notices (RTA Form 9) you saved in The Form Manager, at the entry time.
Lease start (green)	The move-in date on the listing.
LEASE ENDS (solid red)	The current lease end date on the listing, so you can't miss it.

Available (yellow)	The available from date on your rental ads.
Inspection due (projected) (dashed orange)	A routine inspection worked out every 90 days from the date you marked the rental leased.
Inspection report (orange)	Reports done in THE Inspection Manager.

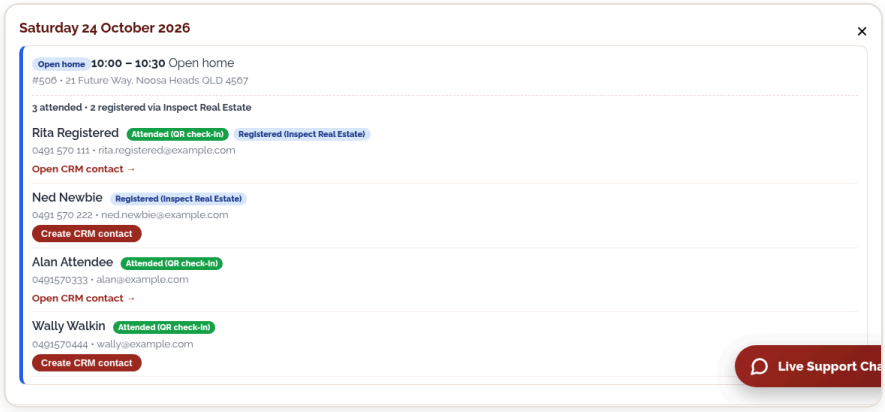


STAGING BUILD · DEMO DATA Figure 108. A day with a lease ending.

29.3 Open homes: registered and attended

Select a day with an open home to see the people:

- **Registered (Inspect Real Estate)**: people who booked or registered for the inspection through Inspect Real Estate (for example from realestate.com.au). TheOnsiteManager reads the booking emails it already receives for your listings.
- **Attended (QR check-in)**: people who checked in at the property with the QR code (Chapter 9).
- Someone who registered and checked in shows both. Someone who registered but didn't check in at a past open home shows **No check-in**.



STAGING BUILD · DEMO DATA Figure 109. An open home with registered and attended people, linked to CRM contacts.

Check-ins are matched to the open home on the same day. If there's no open home time on the listing, the check-ins appear as **Open home (from QR check-ins)**.

Attendee list and printing

Click an open home (or an Inspect Real Estate booking) on the calendar, or choose **Attendee list & print** under it in the day view. A window shows the address, date and time, how many people registered and attended, and a numbered list with each person's **name, mobile, email and status** (Registered, Checked in, or Registered (no check-in) for a past inspection).

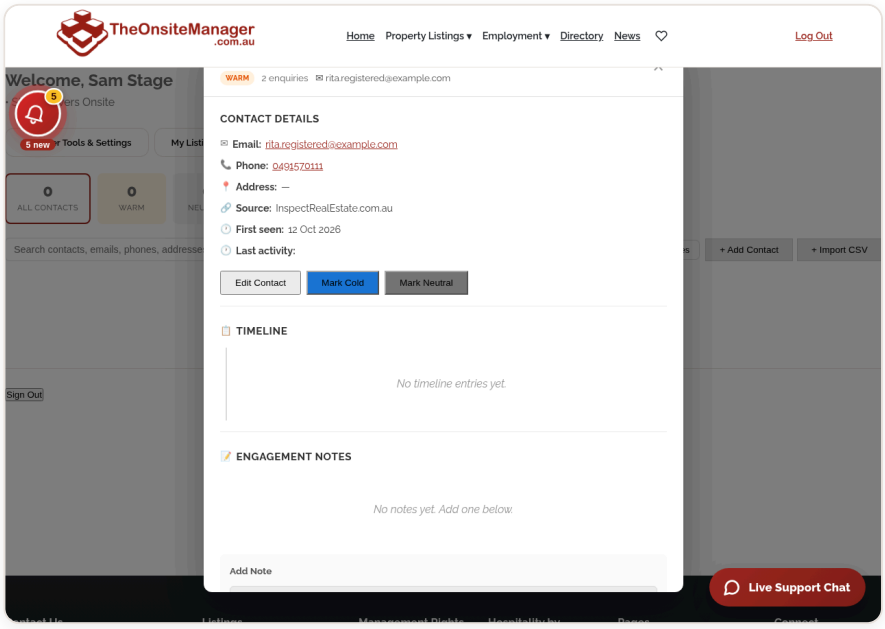
1. Choose **Print attendee list**.
2. An A4 page opens in your browser's print window: the address and time, your business name, the attendee table with a **Signature / notes** column and five blank rows for walk-ins, and the listing's **check-in QR code** at the bottom ("Scan to check in").

3. Print it, or choose **Save as PDF**. Take it to the open home: people who aren't on the list can scan the QR code to check in (9.4).

> ℹ️ The printed list contains people's contact details. Keep it secure and destroy it when you no longer need it.

29.4 CRM contacts

Each person is matched to your CRM contacts (Chapter 14) by email or mobile. Select **Open CRM contact** to see their details, enquiries and notes. If there's no contact yet, select **Create CRM contact**. If a contact with the same email or mobile already exists, it's used instead, so you won't get duplicates.

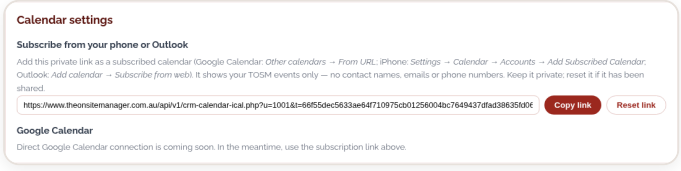


STAGING BUILD · DEMO DATA Figure 110. Opening a contact from the calendar.

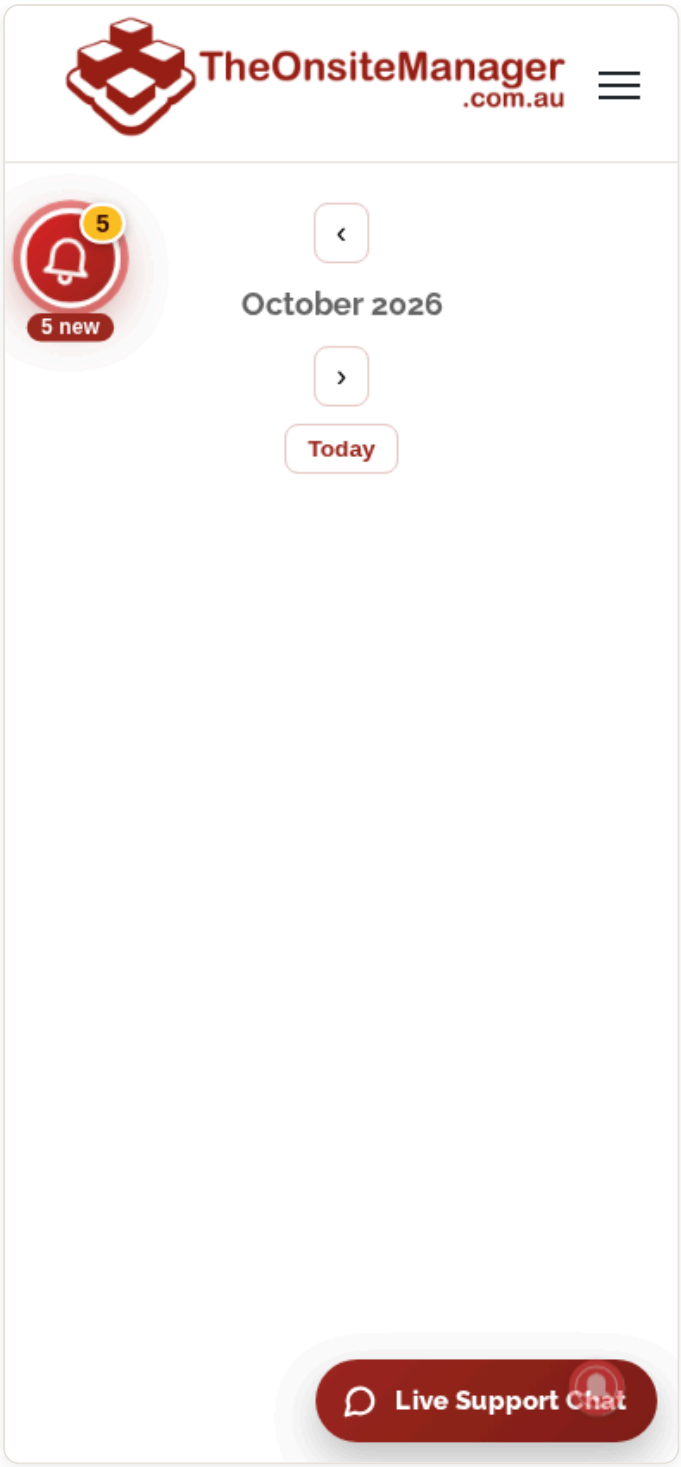
29.5 On your phone, and in Google, Apple or Outlook calendars

The CRM Calendar works on phones too. You can also see your TheOnsiteManager activities in your own calendar app:

- **Subscribe link (any calendar app):** in the CRM Calendar, open **Calendar settings** and copy your private **subscription link**. Add it in Google Calendar (Other calendars, From URL), Apple Calendar (New Calendar Subscription) or Outlook (Add calendar, Subscribe from web). Your calendar app refreshes it regularly (Google can take several hours). Keep the link private. If it's shared by mistake, choose **Reset link** and the old one stops working.
- **Connect Google Calendar:** when this option is available in Calendar settings, it adds your activities to a separate calendar in your Google account and keeps it up to date. You can disconnect at any time.



STAGING BUILD · DEMO DATA Figure 111. Calendar settings: your private subscription link. The subscription feed shows addresses and event types only, with no contact names, emails or phone numbers.



STAGING BUILD · DEMO DATA Figure 112. The CRM Calendar on a phone.

29.6 FAQ

Question	Answer
An open home is missing.	The calendar uses the inspection times on the listing. If you removed past times from the listing, they can't be shown, but any QR check-ins still appear.
No lease end dates show.	Add the current lease end date to the listing.
Can other managers see my calendar?	No. You only see your own listings and contacts.

APPENDIX A

Glossary

Plain-language meanings of the terms used in this manual.

Active
A published listing that is visible on the website and sent to the portals.

Agent Agreement (desk fee)
Your annual subscription to work under TheOnsiteManager's licence: LITE or FULL.

Alias email
Your yourname@theonsitemanager.com.au address, which forwards to your own inbox.

AML/CTF
Anti-Money Laundering and Counter-Terrorism Financing: the law requiring the agency to verify the people it acts for.

ARAMA
The Australian Resident Accommodation Managers' Association. Members receive 10% off the Agent Agreement.

AUP
Acceptable Use Policy. Usually means realestate.com.au's rules for listings.

AUSTRAC
The Australian Government agency that regulates AML/CTF.

Beneficial owner
A person who ultimately owns or controls a trust or company (for companies here, more than 25%).

CDD
Customer due diligence: identifying and verifying a customer under the AML/CTF Act.

CDD-verified owner
An owner or vendor who has completed every required VERIFII step. Needed before THE Inspection Manager can send a report.

CLONE
Making a new draft copy of a listing with a new Listing ID.

Condition report
A record of the property's condition, room by room, signed by the manager and tenant. In Queensland: Form 1a at entry and Form 14a at exit (Chapter 25).

Co-tenant
An additional adult applicant invited by the lead applicant. Also called a secondary applicant.

Control Panel
Your home page after signing in, with tools, listings, the CRM tab and analytics.

CRM
Customer Relationship Manager: the CRM page (Control Panel → CRM) with your enquiries, contacts, pipeline, follow-ups, calendar, reports, duplicates and match alerts.

DATA LOGS
A listing's record of portal deliveries and changes.

Domain
domain.com.au, a major property portal. Standard is included with every listing.

Draft / Inactive
A saved listing that isn't published, or that has been withdrawn.

Enquiry-to-view rate
Enquiries divided by page views for the same period, shown as a percentage. Shown in the Performance Report where view figures exist (14.16).

Entry vs exit comparison
Annexure C of an exit report, showing each item's entry and exit condition side by side with changes highlighted.

Feature / Highlight / Premier
Paid REA upgrade levels above Standard.

Finalise
Permanently locking an inspection report and building its final PDF. A finalised report can't be reopened.

Form 1a / Form 14a
The Queensland RTA entry and exit condition report forms for general tenancies.

FULL
The Agent Agreement level that includes sales and RealWorks.

Gravatar
A free service that links your photo to your email. Used for the agent portrait on listings.

Inspection hub
The page opened by THE INSPECTION MANAGER button, showing a listing's owners, tenants and reports.

iRE
Inspect Real Estate, an inspection and application platform that receives our listings.

Liveness / Proof of Life
A short selfie video that shows the applicant is the person on the ID.

Listing ID
The 8-digit number that identifies a listing. Always quote it to support.

LITE
The Agent Agreement level for rentals only (no RealWorks).

LREA
Licensed Real Estate Agent acting under TheOnsiteManager's principal licence.

MR
Management rights: the business of managing and letting units in a complex.

NOT ON REA
A pill showing that REA hasn't been paid, so the listing isn't on realestate.com.au.

NTD / VEDA
The National Tenancy Database (operated by Equifax, formerly Veda), used to check tenancy history.

Open Home Attendee
A person who registered by scanning a listing's OPEN HOME QR code.

Performance Report
A printable report for owners with a listing's realestate.com.au statistics and its enquiries from all portals (14.16).

Portal
A property advertising website (REA, Domain, Homely and so on).

Pricefinder
A property sales and rental data service (shared agency login).

REA
realestate.com.au, Australia's largest property portal.

RealWorks
An online REIQ forms and agreements system (FULL plan).

Reopen
Unlocking a signed or sent inspection report to edit it. Cancels all signatures and withdraws sent links.

Routine inspection
A periodic inspection during a tenancy (in Queensland at most once every 3 months, with an entry notice).

RTA
The Residential Tenancies Authority, Queensland's tenancy regulator, which publishes the condition report forms.

Recycled listing
Reusing or refreshing an old listing for a new campaign or a different property. Banned by REA.

REPOST XML
Re-sending a listing's data file to the portals.

Search impressions
How many times a listing appeared in realestate.com.au search results (14.16).

Sub-organisation
Your business's account under TheOnsiteManager in RealWorks or Inspect Real Estate, needed for integrations.

Sending is blocked
THE Inspection Manager message shown until at least one owner is CDD-verified in VERIFII.

Syndication
Automatically sending your listing to many portals.

THE Inspection Manager
The beta tool for entry, exit and routine condition reports, opened from My Listings.

Tranche 2
The 2024 AML/CTF reforms that brought real estate agents under AUSTRAC regulation.

VERIFII
The verification and application platform (verifii.au) used for rental applications and AML checks.

Withdraw
Hiding a listing and telling the portals to remove it.

XML feed

The data file that carries your listing to each portal.

APPENDIX B

Checklists

Print these and keep them by the desk.

B1. New rental listing

- [ ] Signed authority from the owner
- [ ] Owner name and email for AML (VERIFY OWNER)
- [ ] Correct category
- [ ] Address picked from suggestions; unit as 4/12; spelling checked
- [ ] Rent, bond, date available, rooms
- [ ] Features ticked
- [ ] Landscape photos ≥1000 px; best first; no logos or text
- [ ] Floorplan as GIF (optional)
- [ ] Wording passes the checker
- [ ] Inspection times added
- [ ] REA level chosen; total checked; Publish
- [ ] My Listings shows Active (+ PAID and REA link once REA accepts it)

B2. Residential sale listing

- [ ] FULL plan
- [ ] Signed appointment
- [ ] Vendor details entered and verification sent (mandatory)
- [ ] Price and display price
- [ ] Photos, wording and inspections as B1
- [ ] REA and Domain levels chosen; Publish
- [ ] VERIFY PURCHASER when a buyer is found
- [ ] Sold: status, price and date updated the same day

B3. Property leased

- [ ] Owner instruction in writing
- [ ] Successful and unsuccessful applicants told
- [ ] Lease prepared in The Form Manager and signed
- [ ] Application PDF saved securely
- [ ] UPDATE → Status Leased → Publish (same day)
- [ ] Check the portals after 24 hours; WITHDRAW AGAIN if needed
- [ ] Offer Tenant Connections

B4. Re-advertising a property

- [ ] CLONE the previous listing (don't reuse the old one)
- [ ] Check the address, unit, price and date available
- [ ] Update photos if anything has changed
- [ ] Add new inspection times
- [ ] Choose the REA level and Publish
- [ ] Withdraw any older duplicate

B5. Entry condition report (THE Inspection Manager)

- [ ] Owner registered in VERIFII and verified (green "Owner verified")
- [ ] Tenant applied through VERIFII and selected in the hub (or added manually with a reason)
- [ ] Entry condition report started from the hub
- [ ] Every room answered (Clean / Undamaged / Working); comments for every N
- [ ] At least one photo per room; problems photographed and marked up
- [ ] Details: date, water meter, metering, keys and notes
- [ ] Official RTA Form 1a previewed; warnings checked
- [ ] Signed as lessor/agent
- [ ] Sent: owner (view) and tenant (comment & sign); privacy box ticked
- [ ] Tenant signed within 7 days; comments reviewed
- [ ] Finalised; final copy to the tenant within 14 days

B6. Exit condition report

- [ ] Exit condition report started from the hub (copies the entry report)
- [ ] Every item re-checked; changes commented and photographed
- [ ] Water meter reading at the end of the tenancy
- [ ] Tenant forwarding details collected
- [ ] Entry vs exit comparison reviewed (fair wear and tear considered)
- [ ] Official RTA Form 14a previewed, signed and sent within 3 business days
- [ ] Finalised after the tenant has signed or commented

B7. Before contacting support

- [ ] Listing ID ready
- [ ] Status pills and DATA LOGS checked
- [ ] Published after the change?
- [ ] Waited a few hours (portals) or 24 hours (removals, upgrades)?
- [ ] Screenshot of any error

APPENDIX C

Index of common problems

Find the fix by symptom. The number after each entry is the page.

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APPENDIX D

Screenshot register

Every screenshot in this manual, how it was produced, and the screens still to be captured from a live account.

Live UI · demo data: production pages rendered in a browser, with the server responses replaced by fictitious demo data, so no real customer or manager information appears and nothing was changed on any system. **Real capture**: public pages as they appear on the live site (third-party listing content blurred). **Illustrative**: built from the real page template or a sample document with demo data, for flows that can't be captured safely. **Staging build · demo data**: THE Inspection Manager on the test (staging) server with made-up demo data; the site logo and some icons don't load there.

Fig.	File	Shows	Type
1	images/screens/public-join.png	The Join page: choose "I'm A Licensed Onsite Manager" if you are a property manager.	Real capture
2	images/screens/public-login.png	Sign In window on desktop. The live listing behind it has been blurred.	Real capture
3	images/screens/m-public-login.png	The same Sign In window on a phone.	Real capture
4	images/screens/cp-tools-top.png	The Control Panel opens on the Manager Tools & Settings tab.	Live UI · demo data
5	images/screens/cp-tools.png	All tool cards on the Manager Tools & Settings tab (desktop).	Live UI · demo data
6	images/screens/modal-renewal.png	The renewal reminder appears when your agreement is 45 days or fewer from expiry.	Live UI · demo data
7	images/screens/m-control-panel.png	Control Panel on a phone. The tabs wrap and cards stack.	Live UI · demo data
8	images/screens/m-my-listings.png	My Listings on a phone. Each listing becomes a card.	Live UI · demo data
9	images/screens/cp-listings.png	My Listings with five demo listings: live and paid, sale not on REA, draft, leased, and portal error.	Live UI · demo data
10	images/screens/cp-listing-row.png	A live, paid rental. The pills show Current, Active and PAID, plus the REA listing number.	Live UI · demo data
11	images/screens/modal-not-on-rea.png	Selecting NOT ON REA explains what to do.	Live UI · demo data
12	images/screens/modal-rea-error.png	Selecting ERROR shows the portal's message (Portal Update Error).	Live UI · demo data
13	images/screens/cp-row-notonrea.png	A sale listing that is live on TheOnsiteManager but NOT ON REA. A vendor verification is in progress.	Live UI · demo data
14	images/screens/cp-row-draft.png	A draft listing is shaded and marked Draft/Inactive.	Live UI · demo data

15	images/screens/cp-row-leased.png	A leased, withdrawn listing. UPDATE is gone and WITHDRAW AGAIN is offered.	Live UI · demo data
16	images/screens/cp-actions.png	Action buttons on a live rental.	Live UI · demo data
17	images/screens/wiz-01-category.png	Step 1: pick the property category, then choose Next.	Live UI · demo data
18	images/screens/wiz-02-address-new.png	Step 2: start typing the address and pick it from the suggestions.	Live UI · demo data
19	images/screens/wiz-02-address-manual.png	Show All Fields displays every address field for manual entry.	Live UI · demo data
20	images/screens/wiz-03-details.png	Step 3 for a rental: rent, bond, availability and rooms. Bathrooms is required.	Live UI · demo data
21	images/screens/wiz-04-features.png	Step 4: tick the features that apply.	Live UI · demo data
22	images/screens/wiz-08-review-unpaid.png	The Review step for a new rental: summary, REA levels, Domain levels, photo enhancement, status, AML/CTF and total.	Live UI · demo data
23	images/screens/wiz-draft-modal.png	Saving as a draft applies no charges. You can buy upgrades later.	Live UI · demo data
24	images/screens/m-wizard-review.png	Wizard step boxes on a phone (two-column grid).	Live UI · demo data
25	images/screens/m-wizard-media.png	The Media step on a phone. Choose Files opens your camera roll.	Live UI · demo data
26	images/screens/wiz-aml-block.png	Publishing a sale without vendor details is blocked with this notice.	Live UI · demo data
27	images/screens/wiz-08-review-sale.png	The Review step for a residential sale. The REA Standard price differs and the AML section asks for the vendor.	Live UI · demo data
28	images/screens/wiz-03-details-mr.png	Details step for management rights: price, net income, remuneration, unit numbers and agreement terms.	Live UI · demo data
29	images/screens/wiz-08-review-mr.png	Review step for management rights: feature credits, Listing Of The Month bid, status and authority.	Live UI · demo data
30	images/screens/wiz-02-address-uae.png	Choosing United Arab Emirates switches State to an Emirate list. The manual-entry warning is shown.	Live UI · demo data
31	images/screens/wiz-05-media-panel.png	The Media step: drop zone, numbered thumbnails, virtual tour and video links, and floor plan upload.	Live UI · demo data
32	images/screens/modal-book-photo.png	BOOK PHOTO on My Listings: choose a package and preferred time.	Live UI · demo data
33	images/screens/wiz-06-wording.png	Step 6: headline and description.	Live UI · demo data

34	images/screens/wiz-06-wording-errors.png	The one-time warning that appears when the checker first finds a problem.	Live UI · demo data
35	images/screens/wiz-06-wording-errors-list.png	The checker found a business name, a website, an email and a phone number. All must be removed before you can continue.	Live UI · demo data
36	images/screens/wiz-07-inspections.png	Step 7: existing inspection times (with a remove button) and the form to add another.	Live UI · demo data
37	images/screens/modal-open-home.png	OPEN HOME on My Listings generates an A4 QR code for that listing.	Live UI · demo data
38	images/screens/modal-ideal-week.png	Ideal Week: set the days and times you are available for inspections.	Live UI · demo data
39	images/screens/wiz-02-address-locked.png	After payment the address fields are locked: "This listing has been paid for, you cannot alter the address now."	Live UI · demo data
40	images/screens/modal-upgrade-prices.png	Get Upgrade Prices: enter an address and category to see REA prices for that suburb.	Live UI · demo data
41	images/screens/wiz-08-review-rental.png	The REA and Domain level cards on the Review step. Prices shown are for the demo suburb.	Live UI · demo data
42	images/screens/invoices.png	Invoices and Receipts: Xero invoices at the top, card payment receipts below.	Live UI · demo data
43	images/screens/listing-detail.png	A rental listing page on TheOnsiteManager (demo). The agent panel shows Call, Apply For This Rental, Book Inspection, Favourites and Brochure.	Live UI · demo data
44	images/screens/cp-row-error.png	A listing with a red ERROR pill. Select it to see the portal's message.	Live UI · demo data
45	images/screens/modal-data-logs.png	DATA LOGS: publication events, results from each portal, and the change log.	Live UI · demo data
46	images/screens/crm2-cp-tab.png	The single CRM tab in the Control Panel.	Live UI · demo data
47	images/screens/crm2-enquiries.png	The CRM, Enquiries tab: the tab bar along the top, search and buttons, the enquiry list on the left and the contact card on the right.	Live UI · demo data
48	images/screens/crm2-tablet-more.png	On a narrower screen, Reports, Duplicates and Match alerts are under More.	Live UI · demo data
49	images/screens/crm2-enquiry-open.png	An enquiry opened in the list, with the contact card beside it.	Live UI · demo data
50	images/screens/crm2-contacts.png	The Contacts tab, filtered by lead rating.	Live UI · demo data
51	images/screens/crm2-contact-card.png	The contact card: the action buttons, the latest enquiry, the buyer/renter profile and the timeline.	Live UI · demo data

52	images/screens/crm2-contact-reply.png	Reply with a template. Replies are emailed to the contact and logged on the timeline.	Live UI · demo data
53	images/screens/crm2-pipeline.png	The Pipeline board.	Live UI · demo data
54	images/screens/crm2-pipeline-drawer.png	Selecting a card opens the contact card from the right.	Live UI · demo data
55	images/screens/crm2-tasks.png	Tasks & follow-ups.	Live UI · demo data
56	images/screens/crm2-reports.png	Reports: enquiries and response times by portal and by listing.	Live UI · demo data
57	images/screens/crm2-duplicates.png	Duplicates: suggested pairs to merge.	Live UI · demo data
58	images/screens/crm2-alerts.png	Match alerts and the matching listings.	Live UI · demo data
59	images/screens/crm2-mobile-list.png	The Enquiries tab on a phone.	Live UI · demo data
60	images/screens/crm2-mobile-card.png	A contact card on a phone.	Live UI · demo data
61	images/screens/email-autoresponder-demo.png	The "Thanks for your enquiry" email, rebuilt from the live template with demo details.	Illustrative
62	images/screens/cp-analytics.png	Analytics: totals, daily charts, a per-listing breakdown and portal statistics.	Live UI · demo data
63	images/screens/perf-report.png	The Performance Report: the realestate.com.au section, the Total section and enquiries by portal.	Live UI · demo data
64	images/screens/verifii-apply-start.png	The application start page: the property, then the applicant's name and email.	Illustrative
65	images/screens/verifii-apply-mobile.png	The same page on a phone. Most applicants apply on their phone.	Illustrative
66	images/screens/verifii-workflow-rental.png	The applicant's progress page: 13 steps, each marked Required or Optional, with progress shown at the top.	Illustrative
67	images/screens/cp-verifs.png	A rental's VERIFII & Applications column, expanded: owner verification, then "2 applications" with each applicant's status and a View in VERIFII link.	Live UI · demo data
68	images/screens/verifii-detail-files.png	The VERIFII details window: activity timeline, applicant details and Uploaded Files (ID, liveness video and income documents).	Live UI · demo data
69	images/screens/verifii-detail-reference.png	Further down: Workflow Steps and Reference Response(s), including the referee's answers and files such as the tenant ledger.	Live UI · demo data

70	images/screens/verifii-workflow-owner.png	An owner's VERIFII progress page (Owner/Vendor Verification).	Illustrative
71	images/screens/modal-verify-owner.png	VERIFY OWNER: choose the entity type, then enter the owner's name, email and (optional) mobile.	Live UI · demo data
72	images/screens/cp-row-notonrea.png	A sale listing with a vendor verification in progress, plus the VERIFY VENDOR and VERIFY PURCHASER buttons.	Live UI · demo data
73	images/screens/modal-verify-purchaser.png	VERIFY PURCHASER: the same layout as the owner form, ending with "Initiate Purchaser Verification".	Live UI · demo data
74	images/screens/verifii-workflow-purchaser.png	A purchaser's VERIFII progress page.	Illustrative
75	images/screens/modal-service-warning.png	The warning shown before Pricefinder or NTD opens.	Live UI · demo data
76	images/screens/account.png	My Account: login, administration, letting agent, sales agent, addresses, and a link to invoices.	Live UI · demo data
77	images/screens/modal-agent-change.png	Request Change of Agent Details: enter the new letting and/or sales agent details for approval.	Live UI · demo data
78	images/screens/chat-open.png	Live Support Chat open in the Control Panel (desktop).	Live UI · demo data
79	images/screens/m-chat.png	Live Support Chat on a phone. It opens full screen.	Live UI · demo data
80	images/screens/im-01-my-listings-button.png	My Listings: THE INSPECTION MANAGER button on a rental and a real estate listing. The commercial listing (bottom) doesn't have it.	Staging build · demo data
81	images/screens/im-24-hub-owner-missing.png	No owner registered in VERIFII. You can still create, fill in and sign the report.	Staging build · demo data
82	images/screens/im-25-hub-owner-unverified.png	Owner registered but verification not finished, with the step progress.	Staging build · demo data
83	images/screens/im-03-hub-tenant-selected.png	The hub with a verified owner and two selected tenants (demo data). The report buttons are at the bottom.	Staging build · demo data
84	images/screens/im-04-hub-manual-tenant-fallback.png	Adding a tenant manually. The reason you enter is logged.	Staging build · demo data
85	images/screens/im-06-checklist-with-photo.png	The Rooms & items tab. Rooms are on the left with a count of answered items; each item has Clean, Undamaged and Working buttons, a comment, photos and Flag maintenance.	Staging build · demo data
86	images/screens/im-08-annotation.png	Marking up a photo: choose a colour and draw on the problem.	Staging build · demo data
87	images/screens/im-09-checklist-mobile.png	The same checklist on a phone.	Staging build · demo data

88	images/screens/im-10-custom-room.png	A custom room added with + Add room.	Staging build · demo data
89	images/screens/im-11-details.png	The Details tab.	Staging build · demo data
90	images/screens/im-compare-exit.png	The entry vs exit comparison annexure in an exit report PDF (demo data).	Illustrative
91	images/screens/im-12-review.png	Review & sign: warnings, the RTA form preview buttons and your signature.	Staging build · demo data
92	images/screens/im-form14a-p1.png	Page 1 of a filled-in RTA Form 14a (exit) with demo data.	Illustrative
93	images/screens/im-15-send.png	Send & reports with a verified owner and two tenants, before anyone is ticked.	Staging build · demo data
94	images/screens/im-27-send-blocked-owner-unverified.png	Sending blocked: the owner has done 3 of 7 VERIFII steps.	Staging build · demo data
95	images/screens/im-30-send-unlocked-one-owner-verified.png	Two owners, one verified: sending is allowed, but only to the verified owner.	Staging build · demo data
96	images/screens/im-17-tenant-link.png	The tenant's link page on a phone.	Staging build · demo data
97	images/screens/im-18-tenant-sign.png	The tenant signs at the bottom.	Staging build · demo data
98	images/screens/im-19-tenant-done.png	Confirmation after signing.	Staging build · demo data
99	images/screens/im-20-manager-sees-tenant-comment.png	You see the tenant's comment under the item, and the report status shows Tenant signed.	Staging build · demo data
100	images/screens/fm-new-document.png	The Form Manager: New document, choosing a form.	Staging build · demo data
101	images/screens/fm-send-signing.png	Sending a saved document for free electronic signing.	Staging build · demo data
102	images/screens/rem-login-modal.png	The routine inspection pop-up, with one entry for each rental that is due.	Staging build · demo data
103	images/screens/fm-form9-entry-notice.png	An Entry Notice (RTA Form 9) in The Form Manager.	Staging build · demo data
104	images/screens/rem-bell.png	The notification bell with 5 unread notifications.	Staging build · demo data
105	images/screens/rem-notification-panel.png	The notification panel, including routine inspection reminders with their links.	Staging build · demo data
106	images/screens/crm2-calendar.png	The Calendar tab inside the CRM.	Live UI · demo data
107	images/screens/cal-02-month-view.png	The month view. Each colour is a different kind of activity.	Staging build · demo data

108	images/screens/cal-04-day-lease-end.png	A day with a lease ending.	Staging build · demo data
109	images/screens/cal-03-day-open-home-attendees.png	An open home with registered and attended people, linked to CRM contacts.	Staging build · demo data
110	images/screens/cal-05-open-crm-contact.png	Opening a contact from the calendar.	Staging build · demo data
111	images/screens/cal-07-settings.png	Calendar settings: your private subscription link. The subscription feed shows addresses and event types only, with no contact names, emails or phone numbers.	Staging build · demo data
112	images/screens/cal-06-mobile.png	The CRM Calendar on a phone.	Staging build · demo data

D.1 Screens still to capture from a real (test) account

Screen	Why it isn't included yet
THE Inspection Manager screens from the live site	Chapter 25 uses the staging build (logo and icons missing). Recapture with a test listing once the beta is live.
THE Inspection Manager tenant and owner emails, and the exit-report comparison panel in the app	Emails were only produced in test mode; the comparison is shown from the PDF annexure.
Card payment page (after Publish)	A hosted payment page. Capturing it would mean starting a real payment.
A4 open-home QR sheet and the visitor registration page	Generated per real listing. Should be captured with a test listing.
Real inbox examples: enquiry notification, application milestone emails, VERIFII invite emails	Need a test mailbox. The autoresponder in 14.11 is rebuilt from its template.
VERIFII applicant steps in progress (ID capture, liveness video, income upload)	Need a test applicant on a phone. 15.3 shows the progress list only.
VERIFII co-tenant status panel with a Resend button	Needs a test application with co-tenants.
RealWorks, Pricefinder and NTD screens	Third-party systems behind shared or personal logins.
REA and Domain listing pages for a TheOnsiteManager listing	Would show a real manager's listing. Capture a test listing, or blur.
Analytics "Email This Report To Owner" result and Top Managers Leaderboard with data	The demo data doesn't populate these. Capture with a live test account.
Low Quality Images warning and photo enhancement before/after on real photos	Need actual uploads in the wizard.