

Make the SWITCH



What's involved in transferring my existing system to Palace?

The particular software system you are currently using will determine how much information can be transferred. For most of the major systems available, Realbase are able to extract and convert owner, property, tenant and tradesperson information. This includes, but is not limited to elements such as name and address, phone numbers, email addresses, and property features. Depending on which system you are converting from, Realbase can also convert all the **transaction history** for tenants and owners, allowing you to produce a full year end statements - this makes Realbase unique in the industry. Additionally, further data that can be converted includes diary and activity notes, reminder entries, scheduled inspection information and works orders.

How long does the data conversion take?

Realbase always installs the full Palace product a few days before the end of a month and ensures that any technical issues have been dealt with. A backup of your data taken immediately after closing the month is then sent to us. Once the data is received it is converted into the Palace database format – usually overnight – and restored into your pre-installed Palace system in the morning of the next working day. We would not expect you to be without a system for more than one working day. Training to use Palace is done in two steps. Once an empty database has been installed at your premises, an initial training session covers the basics. Further training is scheduled soon after the conversion as required.

What about my trust account balances for owners?

The data conversion runs most smoothly when your existing system is *cleared* at the end of the month by paying as many owners as possible, paying the bond centre and management fees. This leaves as few balances in the system as possible. Following the conversion of your data, we review your final trust account reports from your previous system with you and advise how to enter transactions for each account balance. We also guide you through entering your un-presented items be entered into Palace so that we can *roll* the balances into a new month with the correct opening balances and un-presented items. Tenant debt for amounts owing (other than rent) is also required to be entered with a transaction for each tenant.

How traumatic is the change-over?

Realbase understands the conversion process well, which is why we invest so much effort in getting it right. We also understand it can be worrying for business owners which is why we invite you to speak with companies that have made the switch. These customers comment about Palace's ease of use and are impressed with how much more they can do. Rest assured, we take out the pain and make conversion easy.

"The conversion was hassle free. The data was given to Realbase on the Friday night, I'm not sure what their weekend was like, but one hour into Monday morning we were up and running. Wonderful!"
- Ray White Auckland

