



THE VIRTUAL ASSISTANT TASKS CHECKLIST

Sales • Administration • Marketing • Property Management

A clear, easy-to-use checklist showing how a Virtual Assistant can support your day-to-day operations, reduce workload, and help your business run more smoothly.

VIRTUAL ASSISTANT TASKS

Sales | Admin | Marketing

Software Systems/CRMs that the VA's have had intermediary training on:

- Vault
- REX
- Agentbox
- LockedOn
- Before you Bid
- Homepass
- Xero
- CoreLogic
- Canva
- Printforce
- CampaignTrack
- Real Time Agent
- Realtair
- PriceFinder
- Hubdoc
- AI & Workflow Automation



PROSPECTING

- Prospecting Campaigns – SMS & Voicemail broadcasts
- Just Listed – Email/Letters & Brochures
- Just Sold – Email/Letters & Brochures
- Direct Mail – Absentee Owners & Owner Occupier
- Database – Clean & Wash
- Database Assigning – Action Plans: Appraisals, Past Clients, Birthdays, Easter & Holiday Season
- Brochure Design and Social Media Campaigns
- Other Agents' New Listings
- Tracking – Market Share Analysis
- Cold Calling



APPRAISALS

- Research and compile CMA in RPData & Pricerfinder
- Draft listing agreement
- Confirm ownership via RPData/Pricerfinder/Title search
- Attach appraisal action plan (High/Medium/Low motivation)
- Enter price analysis and property description post-appraisal
- Prepare proposal document for Sales Agent
- Email appointment confirmation and pre-list kit to Sales Agent



LISTING

- Verify property compliance before listing
- Upload listing to CRM
- Review and process signed documents
- Input auction date if applicable
- Create auction invoice if required
- Prepare contracts; confirm title, easements, caveats, covenants
- Arrange signage, photos, and marketing
- Schedule open homes and set OFI times
- Run buyer match



SETTLEMENT

- Save signed contracts and solicitor emails to file
- Prepare exchange letters and invoices
- Enter key contract dates into the system
- Once unconditional, order gifts and mark as sold
- Post-settlement, update anniversary and action plans



VIRTUAL ASSISTANT TASKS

Property Management

Software Systems/CRMS that the VA's have had intermediary training on:

- PropertyMe
- PropertyTree
- ConsoleCloud
- InspectRealEstate
- Inspection Manager
- FLkItOver
- REIForms
- VaultRE
- rea.com.au
- Pricerfinder
- CoreLogic
- domain.com.au
- Xero
- Tapi
- Inspection Express
- AgentBox



FILE MANAGEMENT

- File all documents, emails, call logs, and tasks digitally under the relevant owner or tenant.
- Audit digital files and identify missing documents such as managing agency agreements, tenancy agreements, condition reports, ID, and applications—request these from the Property Manager for upload and indexing.



NEW BUSINESS SUPPORT

- Type up management agreements and prepare onboarding documentation.
- Research comparable rental properties for use in pricing and pitch materials.
- Prepare pre-list and listing presentation collateral for potential landlords.
- Enter new landlord and property data into the agency's system.



LEASE RENEWALS

- Generate lease renewal invitations and letters for landlords and tenants.
- Prepare updated lease agreements including applicable conditions and rent changes.
- Upload fully signed lease agreements and update system with fixed-term and rent increase details.
- Notify landlords once a lease renewal is fully executed.



ARREARS MANAGEMENT

- Send SMS and email arrears reminders at regular intervals (e.g. 3–5, 5–7, 8–11, 12–14 days overdue).
- Provide a call list to the Property Manager for tenants with serious arrears (e.g. 7+ or 12+ days).
- Prepare notices of termination for tenants over 15+ days in arrears for PM approval.
- Phone call tenants reminding them to pay their rent / water usage invoicing

VIRTUAL ASSISTANT TASKS

Property Management



PROCESSING RENTAL APPLICATION

- Chase outstanding application documents from prospective tenants.
- Conduct reference checks (rental, employment, and previous agencies).
- Prepare application summary reports for Property Manager review and landlord approval.
- Communicate application status and next steps to applicants.
- Use application platforms (e.g. Ignite, 2Apply, Snug) to manage submissions.



ADVERTISING & ONLINE LISTINGS

- Upload listing photos, copy, and pricing to portals via CRM.
- Create tenant matching workflows and link prospects to new listings.
- Schedule and upload open for inspection times, including coordination with current tenants.
- Update listing status online (leased, price changes, new photos/copy, etc.).



ROUTINE INSPECTIONS

- Schedule inspections based on required frequency and system prompts.
- Generate entry notices and distribute to tenants.
- Send reminders (SMS, email, or phone) prior to inspection dates.
- Support with compiling and finalising inspection reports for landlords.



COMPLIANCE MONITORING

- Track smoke alarm compliance schedules and notify Property Managers of overdue checks.
- Ensure strata details (plan numbers, contact details) are documented.
- Monitor pool compliance certificates and expiry dates.
- Follow up on annual documentation from trades (e.g. insurances, licenses).

VIRTUAL ASSISTANT TASKS

Property Management



LEASING PROCESS & LEASE PACKS

- Prepare tenancy agreements and issue for signing (e-signature platforms).
- Create and send bond payment links and payment instructions.
- Organise deposit, balance payments, and key handover appointments.
- Send tenant welcome packs and notify strata/building managers of tenant move-ins.
- Ensure tenants receive by-laws and building-specific documents.
- Set up landlord/tenant access to digital portals.
- Notify landlords of completed leasing process.



REPAIRS & MAINTENANCE

- Request approval from landlords for maintenance work.
- Issue work orders to trades and confirm job details.
- Inform tenants of scheduled works and follow up on job completion.
- Chase up outstanding invoices or unresolved maintenance jobs.



EMAIL MARKETING CAMPAIGNS

- Create and schedule monthly newsletters for landlords and tenants (e.g. using Mailchimp or similar platforms).



PAST CLIENT & STAKEHOLDER

- Design and send just listed / just leased flyers or EDMs.
- Create feedback surveys using tools like Survey Monkey for landlords and tenants post-interaction (e.g. move-in, vacate, repairs).



SOCIAL MEDIA CONTENT

- Schedule and post content to platforms like Facebook and Instagram aligned with the company's social media calendar.



END OF MONTH & INVOICE PROCESSING

- Enter invoices from trades into the system and code appropriately.
- Archive notices and send courtesy emails to tenants as needed (e.g. AGMs).
- Process tenant invoices, council/water/strata rates, and generate payment files.
- Assist with supplier and owner payments via system and banking platforms.





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PERSONAL ASSISTANCE

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