



# 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 & Pricefinder
- Draft listing agreement
- Confirm ownership via RPData/Pricefinder/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
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## 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
- FlickItOver
- REIForms
- VaultRE
- rea.com.au
- Pricefinder
- 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



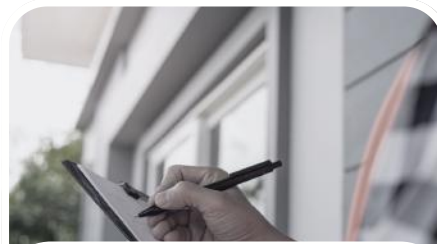
### PROCESSING RENTAL APPLICATION

- 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.



### 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).



### 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.



### EMAIL MARKETING CAMPAIGNS

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



### SOCIAL MEDIA CONTENT

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





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