PROMPT WORKS STUDIO

Chaos to calm, built to be yours.

Prospect Street Property

Workflow Audit

Prepared for Dana Halloran, Principal and Licensee

Chad Maxwell · Prompt Works Studio · Toowoomba

October 2026

> **A made-up example.** Prospect Street Property and its people aren't real. The software, prices, rules and pay rates in it are, as read on the dates shown.

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About me and this Audit

Who I am. I'm Chad, and I help small businesses work out where AI fits. I run my own business on Claude, so I've learned firsthand what it does well and where it needs someone checking.

What this Audit is for. To show you, job by job, what AI can take off your plate, what it can do with a person checking, and what should stay with your people. It's information for you to decide with.

How I work.

- You deal with me, start to finish.
- Privacy's part of every job. Client details only go into tools you've approved.
- A person in your business checks everything AI does before it goes out.
- I'll tell you when the answer is not yet, or not AI at all.
- I'll show you the options I find, including ones that aren't mine. You choose.
- I only take on a Build that pays for itself within 12 months, counted job by job, with your time costed at the award minimum so the saving isn't overstated.
- When I report on the AI tools your people use, I name the tools and the jobs. I don't say who uses what.
- The report is yours. Take it to anyone you like.
- It's drafted with AI, and checked and signed off by me.

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Summary

What I did. Half a day at your office on Tuesday 27 October, with you, Ellie (property management assistant), Kate and Jordan (property managers) and Mitch (salesperson). I looked at the five jobs that take the most desk time.

Your data and who checks. Tenant, owner and buyer details only go into tools the agency has approved under its AI use policy (section 9). Every piece of AI work is checked by a named person before it goes to a tenant, owner, buyer or the portals, and the check is recorded.

What I found.

- **About 19.75 hours a week go on the five jobs I looked at.** Repairs and routine inspections are 12 of them.
- **AI is already in use, in two places you'd want to tighten.** Listing copy is drafted in a free AI tool on a personal phone, and an AI photo app has been used to tidy listing photos.
- **Some inspection photos sit on personal phones.** Since 1 May 2025 the tenancy law treats them as tenant information that has to be kept securely.
- **Your trust account is in good order,** and nothing I'd build touches the trust records.
- **Price opinions and appraisals stay with you and Mitch.** Nothing here hands those to AI.
- **Your mail and accounts have 3 gaps** (the page before section 10).

Fix now (section 7). Stop listing details going into the free tool. Set a rule for photo edits. Move inspection photos off personal phones. Put a written AI use policy in place. Add AI to your privacy policy, and make sure you're enrolled with AUSTRAC for your sales work.

Your options (section 8). These don't involve me. The cheapest fixes come out best at your size: a better repair form, templates, and entry notices sent a run at a time. Together they cost about $467 of staff time to set up, nothing a month, and give back 2.5 to 4 hours a week, worth $317 to $507 a month. PropertyMe's own AI (Reply with AiMe) is the cheapest paid option I could price for repairs, at up to $99 a month more than your plan now.

What I can do for you (section 10). I'd build two jobs in your own Claude account: repairs and routine inspections. (A **Build** is my word for setting up one job with you, testing it and training your people.) Each pays for itself in 11.7 to 17.5 months, which meets my 12-month rule at the better end of my estimates. Listings and the month-end don't, so I wouldn't take them on. The two cost $10,650 to start, inc GST: two Builds at $4,200, the $1,500 Build fee less your $750 Audit fee (if you go ahead within 90 days), and $1,500 to set Claude up properly. Then it's up to $177 a month. They'd give back 5.5 to 7.5 hours a week and save $524 to $779 a month. With the free fixes on listings and the month-end as well, it's $10,822 to start, saves $618 to $936 a month, pays back in 11.6 to 17.5 months, and is $11,436 to $22,857 ahead after three years, against $10,953 to $17,783 for the free fixes alone.

1. The firm today

People	5: Dana (principal and licensee), Mitch (salesperson), Kate and Jordan (property managers), Ellie (property management assistant and reception)
Clients	About 250 rentals for about 190 owners, mostly in Toowoomba, and about 35 sales a year
Software	PropertyMe Manage PM (Standard plan) for the rent roll and trust account. PropertyMe Grow CRM for sales. Microsoft 365 Business Standard (Outlook, Word). Listings go to realestate.com.au, Domain and your website
Busy season	December to February, when most leases turn over. Repair requests jump after a storm

Your goal for the Audit, in your words: "Get Kate and Jordan out of the inbox and back out at the properties."

2. AI already in use

You agreed I could talk to each person on their own. As agreed, this section names tools and jobs. It doesn't say who uses what.

Tool	Paid for by the agency?	Used for	Client details going in?
ChatGPT, free version, on a personal phone	No, a personal account	Drafting listing copy from the agent's notes	Yes: addresses and features, and once a seller's name and reason for selling
An AI photo app on a personal phone	No, a personal account	Brightening listing photos, and once taking a wheelie bin and a hose out of a front yard shot	Photos of the property
PropertyMe Manage PM, Standard plan	Yes, monthly	Rent roll, trust account, inspections app	AiMe Connect, Reply with AiMe, AiMe Comply and Bills AI are on the Advanced plan, so you don't have them
Microsoft 365 Business Standard	Yes, monthly	Email and documents	No Copilot add-on on your licence

Nobody was doing anything they thought was wrong. The free tool and the photo app were just the easiest things to hand. But a free tool on a personal phone is outside anything the agency controls, and the agency doesn't know what's been put into it.

3. What the guidance says, and what I saw

This section sets out what the regulators and industry bodies have published that bears on AI, next to what I saw on the day. **It isn't legal advice.** For what it means for your agency, talk to your own adviser or the REIQ.

Guidance	What it asks for, in short	What I saw
Property Occupations Act 2014, s 212, and the **Office of Fair Trading**, Property advertising, updated 1 July 2026	Nothing false or misleading about letting, exchanging or selling property. A claim made without reasonable grounds counts as misleading, and you have to show the grounds. It covers rentals as well as sales. Under the Australian Consumer Law a misleading claim about selling property can cost an individual up to $2.5 million per breach, and a company far more.	Listing copy drafted by a free AI tool goes up after a quick read. Nobody checks each claim against a source.
REIQ site, "Artificial intelligence in real estate", Carter Newell Lawyers, 2 February 2026	Treat AI as a drafting tool only. An agent can still be liable when AI wrote the words. Photo edits that lighten walls, make rooms look bigger, or remove powerlines, trees or a neighbour's water tower may mislead.	One listing photo had a bin and a hose removed. No rule on what edits are allowed.

Guidance	What it asks for, in short	What I saw
Residential Tenancies and Rooming Accommodation Act 2008 (the RTRA Act), ss 457D and 457E (from 1 May 2025)	Collect tenant information only for managing the tenancy. Inspection photos count. Store it securely, and destroy it within 7 years after the tenancy ends. Information about applicants who don't become the tenant goes within 3 months after the tenancy starts.	Most photos are taken in PropertyMe's inspections app, but close-ups are often taken on personal phone cameras and stay in their camera rolls and personal cloud backups.
Trust accounts: Agents Financial Administration Regulation 2014, s 4, and the Office of Fair Trading's trust money pages	Trust software mustn't let a ledger with money in it be deleted, records every change as its own entry, and keeps records in date order. Reconcile within 5 business days of the month's end, and print the hard copy in the same time, keep records 5 years, and have the account audited every year. The licensee answers for the audit report.	All in order. No AI touches the trust records now.
AUSTRAC, Real estate designated services, updated 31 August 2026	From 1 July 2026, brokering the sale, purchase or transfer of real estate is regulated. AUSTRAC's definition of real estate leaves out leases of 30 years or less, so on my reading leasing on its own isn't covered.	Your sales work is likely covered (AUSTRAC says a seller's or buyer's agent is likely to provide the service). If so, you're a "reporting entity", and the Privacy Act covers what you do to meet your AML/CTF duties in that work, whatever your turnover (OAIC). If you haven't enrolled with AUSTRAC, talk to your adviser now.
OAIC (privacy regulator), guidance on commercially available AI products, 21 October 2024, updated 17 January 2025	Look into a tool before choosing it. As best practice, no personal information in public AI tools. Update your privacy policy to cover AI.	Privacy policy doesn't mention AI.
OAIC, automated decisions in privacy policies, from 10 December 2026	A business under the Privacy Act that uses personal information in automated decisions that could significantly affect someone's rights or interests must say so in its privacy policy.	Choosing tenants is a decision about a person. No AI is used in it now. Keep it that way, and if you're covered, update the policy before that changes.
National AI Centre, Guidance for AI adoption: foundations, first published October 2025 (current version 5 May 2026)	Create an AI policy. Keep a register of the AI you use.	No policy. No register.

The good news: none of this is hard to put right. Section 7 lists what to do.

4. The jobs and hours now

Hours are a typical week outside the December to February rush. You checked and signed off these figures on the day.

Job	Hours a week	Who does it	How I timed it
1. Sorting tenant repair requests (about 18 a week)	6	Kate, Jordan	Your records (PropertyMe jobs and the rentals inbox)
2. Booking routine inspections and writing them up (about 12 a week, desk time only)	6	Kate, Jordan	Watched on the day, and your records
3. Writing listings (about 1.7 rentals and 0.7 sales a week)	2	Mitch, Kate, Jordan	Your estimate
4. The trust account month-end	1.75	Ellie, Dana	Your records (last three month-ends)
5. Price opinions and appraisals	4	Dana, Mitch	Your estimate
Total	**19.75**		

Signed: Dana Halloran, 27 October 2026

5. The map

Each step of each job goes one of three ways:

- **Hand to AI:** AI does it or drafts it. A person reads it before it goes anywhere.
- **Hand over with a check:** AI does the work, and a named person checks it against the source every time. The checking time is shown, and it's already taken off the hours back in sections 8 and 10.
- **Keep human:** a person does it. AI doesn't touch it.

Job and step	Where it goes	Why
1. Repairs: reading each request and sorting it, emergency or routine	Hand over with a check, about 45 minutes a week	The Act's list (s 214) decides it. The property manager confirms every one and decides anything unclear.
1. Repairs: reply to the tenant, work order for the tradie, request for the owner's approval	Hand to AI	Drafting from your templates. The property manager reads each one before it goes.
1. Repairs: approving spend over the owner's limit, and paying the invoice from trust	**Keep human**	See section 6.
2. Inspections: listing who's due and planning a run by suburb	Hand to AI	No more than one every 3 months unless the tenant agrees in writing (s 195).
2. Inspections: the details for each entry notice	Hand over with a check, about 30 minutes a week	At least 7 days' notice on Form 9, a 2-hour window, no Sundays, public holidays or outside 8 am to 6 pm (ss 193, 195, 196). The property manager issues it from PropertyMe.

Job and step	Where it goes	Why
2. Inspections: the visit, and what condition the place is in	**Keep human**	See section 6.
2. Inspections: the report comments from the property manager's notes, and the owner's email	Hand over with a check, about 45 minutes a week	Checked against the photos. Photos stay in PropertyMe (s 457E).
3. Listings: first draft of the copy from the listing notes	Hand to AI	Drafting. AI is a drafting tool only (REIQ article).
3. Listings: every claim on size, price, value or rental return	**Keep human**	See section 6.
3. Listings: photo edits beyond light and clean-up	**Keep human**	See section 6.
4. Month-end: the checklist and its dates, the cover note to owners, the auditor's list	Hand to AI	Paperwork around the trust account. Nothing in the trust records themselves.
4. Month-end: receipting, reconciling, paying out, and anything in the trust records	**Keep human**	See section 6.
5. Appraisals: price opinions to sellers and landlords	**Keep human**	See section 6.

6. What stays human, and why

- **Anything in the trust records.** Receipting, reconciling, disbursing and the ledgers stay with PropertyMe and the people who sign for them. The rules say a ledger with money in it can't be deleted and every change goes in as its own entry. You answer for the audit.
- **Approving spend and choosing the tradie** when it's over the owner's limit or not on the emergency list. That's the owner's money and your judgement.
- **The inspection itself.** What a stain or a crack means, and whether something's a breach, needs someone standing in the room.
- **Any claim about price, value, rental return or size.** Under s 212 you need reasonable grounds and have to show them. An agent who knows the facts signs it off.
- **Photo edits that change how the place looks.** Lighter walls, bigger rooms or a view with the powerlines gone may mislead.
- **Price opinions and appraisals.** Same reason as claims. They're yours and Mitch's.
- **Choosing a tenant.** A decision about a person. It stays with the property manager and the owner.
- **Legal questions from tenants, owners or buyers.** Agents aren't meant to give legal advice, and an AI answer can be wrong in ways that are hard to spot. Point them to their own lawyer.

These stay human for good, apart from tenant selection, which I'd look at again at your 12-month review if a tool comes along you're happy to stand behind and your privacy policy says so.

7. Fix now

These are risks, so they don't wait for a choice between options. Each one comes from the guidance in section 3. None of them needs anything from me.

What to do	Why	Guidance
Stop listing details going into the free AI tool on the personal phone	It's outside anything the agency controls, and the OAIC recommends no personal information in public AI tools	OAIC
Set a written rule for photo edits. Cleaning up and extra lighting before the shoot are fine. Nothing that changes what the property looks like	One edit has already taken things out of a photo	Property Occupations Act s 212, REIQ article
Move inspection photos off personal phones into PropertyMe, and clear the copies from camera rolls and personal cloud backups	They're tenant information you have to keep securely and destroy on time	RTRA Act s 457E
Put a written AI use policy in place. Write your own from the guidance in section 3, or use any provider's	You don't have one, and it's the base for everything else	National AI Centre
Name who's accountable for AI (usually you, as licensee), and keep a list of the AI you use	No one's named and there's no list	National AI Centre (the list)
Add a line on AI to your privacy policy, and make sure you're enrolled with AUSTRAC for sales	The anti-money laundering (AML/CTF) rules and the Privacy Act likely cover your sales work	AUSTRAC, OAIC

8. Your options

For each of jobs 1 to 4 I've set out the options I found that don't involve me: what each does, what it costs, and how many hours a week it gives back after checking. Job 5 stays human (section 6), so it has none. What I'd do is in section 10, kept apart so you can weigh these on their own.

How I worked out the figures. I didn't ask what anyone's paid. I cost the time at the award minimum for the role, under the Real Estate Industry Award 2020, from 1 July 2026. Kate and Jordan are property managers at Level 2, $29.45 an hour. Mitch is a salesperson at Level 2 too. He's paid a retainer and commission, and I've costed his time at the Level 2 minimum. Ellie is Level 1 after her first year, $28.00, because she supports the property managers as well as doing reception (reception alone may come under the Clerks award instead). You have no award rate as principal, so your time is costed at Ellie's rate, the lowest in the agency. Jobs 1 to 3 are costed at $29.45 and job 4 at $28.00. So these are the least the time is worth.

Check any figure yourself, or any quote you get. Saves a month = hours back a week × the hourly rate × 4.33 weeks, less any cost a month. Months to pay back = cost to start ÷ saves a month.

Hours back are my estimates from what I saw, after checking time is taken off, shown as a range: the low end and the likely figure. Your real figures go in your records.

These are the options I found. There may be others. I looked at what PropertyMe and Microsoft 365 already do, the makers' own price pages, and products built for property managers. Prices are from each maker's own page on 31 October 2026 and include GST unless I say otherwise.

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Job 1. Sorting tenant repair requests (6 hours a week)

How it runs now. Kate and Jordan do it, about 18 requests a week. A tenant reports through the PropertyMe tenant app, by email or by phone. The property manager reads it and sorts it: an emergency under the Act's list (s 214: a burst water service, a blocked toilet, a gas leak, no hot water, a dangerous electrical fault, storm damage and the like) or a routine repair (everything else, s 215). Emergencies go to the nominated repairer named in the tenancy agreement (s 216). Often that's the agency itself, which sends its emergency tradie straight away. For a routine repair they check the owner's approval limit in the appointment (PO Form 6) and ask the owner if it's over. Then they raise a work order to the tradie, tell the tenant, and arrange access. Either the tenant agrees a time with the tradie, or the agency gives an entry notice with at least 48 hours' notice (s 193). Then they chase the job to done, enter the invoice, pay it from trust against the owner's ledger, and let the owner know. A tenant who couldn't reach anyone can pay for an emergency repair themselves, up to 4 weeks' rent. They then ask for it back in writing, giving at least 7 days (ss 218, 219). It comes to about 20 minutes a request.

	Fix without AI	Upgrade what you have: PropertyMe Advanced	Tapi (TapiHQ), Concierge
What it does	The tenant app's request form becomes the main way in (emergencies still by phone), asking for photos. The emergency list goes in the tenant's welcome pack and app. Reply and work order templates in PropertyMe	Reply with AiMe drafts replies in the PropertyMe inbox from the whole conversation. Bills AI reads tradie invoices into the bill fields, and you check each one before it's saved. AiMe Comply answers tenancy law questions	An AI assistant tenants report repairs to. It asks follow-up questions based on what they say and send
What's left for your staff	Sorting, deciding, writing each work order and owner request, and following up	Sorting, deciding, work orders, owner approvals and follow-up. Reading and sending each draft	Deciding, approving, work orders and follow-up
Setting it up (my estimate)	About 6 hours: the form, the welcome pack page, the templates	About 2 hours: switch it on and set your tone	About 6 hours, plus Tapi's own onboarding
Where client details are kept	PropertyMe, as now	PropertyMe, as now	Tapi's servers, synced with PropertyMe. The pages I read don't say where Tapi's servers are
Who checks	Kate and Jordan, as now	The property manager approves every reply before it sends	The property manager reviews each request it collects
Limits	Tenants who phone still need sorting by hand	PropertyMe's pages say it drafts replies. They don't say it sorts requests or raises work orders	Links with PropertyMe both ways: jobs made in either system sync to the other
Cost to start	$177 (6 hours of Kate's time)	$59 (2 hours)	$177 (6 hours), plus any onboarding fee
Cost a month	Nothing	$82.50 to $99 more than Standard for 250 rentals (Advanced $215 against Standard $182 per 100 properties. Ask PropertyMe how 250 is counted). I've used $99	Quoted

	Fix without AI	Upgrade what you have: PropertyMe Advanced	Tapi (TapiHQ), Concierge
Hours back a week (my estimate)	0.75 to 1.25	1 to 1.5	1.5 to 2.5
Hours still spent a week	4.75 to 5.25	4.5 to 5	3.5 to 4.5
Saves a month, after costs	$96 to $159	$29 to $92	$191 to $319, less Tapi's price
Pays back in	1.1 to 1.8 months	0.6 to 2.1 months	Depends on the quote

What I'd take from this: a better request form gets you an hour back for nothing a month, and PropertyMe's own AI is a cheap next step, but the sorting and the paperwork for each job stay with your property managers whichever you pick.

Job 2. Booking routine inspections and writing them up (6 hours a week)

How it runs now. Kate and Jordan do about 12 a week. They list the properties that are due (no sooner than 3 months after the last one, unless the tenant agrees in writing, s 195) and plan a run by suburb. Each tenant gets an Entry notice (Form 9) at least 7 days ahead, with a 2-hour window. Entry can't be on a Sunday or public holiday, or before 8 am or after 6 pm (ss 193, 195, 196). Email works if the tenancy agreement says so (Residential Tenancies Authority). At the property they take photos in PropertyMe's inspections app. Back at the desk they type the report and email it to the owner with anything that needs doing. They raise any repairs (job 1) and follow up the tenant on anything that's theirs to fix, with a Notice to remedy breach (Form 11) if it comes to that. The desk side is about 30 minutes an inspection. The visit itself is extra, and stays human.

	Fix without AI	Upgrade what you have: Reply with AiMe	Inspection Express, Lightning plan
What it does	Runs planned a month ahead by suburb, and a run's entry notices sent from PropertyMe in one sitting. A standard comment bank in your inspection template. Comments spoken into the inspections app at the property (its voice-to-text, which nobody was using) instead of typed later	Drafts the inspection follow-up emails to owners and tenants in the PropertyMe inbox	Inspection Express 360AI: AI-written comments from the photos, condition reports, 360 tours and smart reminders. Works with PropertyMe
What's left for your staff	Planning, notices, the visit, checking the report and the owner's email	Everything except drafting those emails	Planning, notices, the visit, checking every AI comment against the photos, and the owner's email
Setting it up (my estimate)	About 4 hours	Nothing more, if you have it for job 1	About 8 hours: templates, your properties, and training
Where client details are kept	PropertyMe, as now	PropertyMe, as now	Inspection Express's servers. The pages I read don't say where

	Fix without AI	Upgrade what you have: Reply with AiMe	Inspection Express, Lightning plan
Who checks	Kate and Jordan, as now	The property manager approves every email	The property manager checks every comment before the report goes
Limits	Some typing at the desk is still left	Doesn't touch the report itself	It's a separate app, linked to PropertyMe, so your team learns a second system
Cost to start	$118 (4 hours)	Nothing more	$236 (8 hours)
Cost a month	Nothing	Nothing more if you upgrade for job 1 (up to $99 on its own)	$358.60 ($326 before GST, up to 250 properties)
Hours back a week (my estimate)	1 to 1.5	0.5 to 0.75	2 to 3
Hours still spent a week	4.5 to 5	5.25 to 5.5	3 to 4
Saves a month, after costs	$128 to $191	$64 to $96 if you upgrade for job 1. On its own it costs more than it saves	Costs $104 more than it saves, up to saving $24
Pays back in	Under a month	At once	9.8 months at best. Never at the low end

What I'd take from this: batching the notices and speaking comments on site is worth an hour or more a week for nothing. Inspection Express gives the most hours back but costs about what it saves at your size.

Job 3. Writing listings (2 hours a week)

How it runs now. About 1.7 rentals and 0.7 sales a week. For a sale, Mitch takes notes at the listing appointment and the photographer shoots it. For a rental, Kate or Jordan does the same at the vacate. Then they write the headline and copy and check the facts: land size from the title or council, rates, body corporate levies, pets, the rent and when it's available. The seller OKs sales copy. Sales go to realestate.com.au and Domain from Grow CRM, which also updates your website. Rentals go from Manage PM. Sales copy, with the feature list and a version for each portal, takes about an hour and a half. A rental takes about 35 minutes.

	Fix without AI	Microsoft 365 Copilot Business, one seat	BoxBrownie copywriting
What it does	A listing brief form filled at the appointment (features, sizes, and where each fact comes from), and a headline and three-paragraph template for sales and for rentals	Copilot in Word and Outlook drafts the copy from the brief	Copywriting from BoxBrownie's price list: send the brief and photos, get the copy back. Its price page doesn't say who or what writes it
What's left for your staff	Writing, checking each claim, the seller's OK, uploading	Checking every claim, the seller's OK, uploading	The brief, checking every claim, the seller's OK, uploading
Setting it up (my estimate)	About 3 hours	About 1 hour	About 1 hour

	Fix without AI	Microsoft 365 Copilot Business, one seat	BoxBrownie copywriting
Where client details are kept	Your files, as now	Microsoft 365, under your licence	BoxBrownie's servers. The pages I read don't say where
Who checks	The agent, as now	The agent checks every claim against the brief	The agent checks every claim against the brief
Limits	Still written by hand	Copilot isn't built for real estate. It works from the brief you give it	Turnaround time. Send the brief only, with no seller details
Cost to start	$88 (3 hours)	$29 (1 hour)	$29 (1 hour)
Cost a month	Nothing	$34.54 ($31.40 before GST, paid yearly)	About $439 ($35 a rental up to 150 words, $60 a sale up to 350 words, GST not stated)
Hours back a week (my estimate)	0.5 to 0.75	0.5 to 0.75	1 to 1.25
Hours still spent a week	1.25 to 1.5	1.25 to 1.5	0.75 to 1
Saves a month, after costs	$64 to $96	$29 to $61	Costs $280 to $312 a month more than it saves
Pays back in	0.9 to 1.4 months	0.5 to 1 month	Doesn't, at these numbers

What I'd take from this: the brief form is the real fix, because it gives whoever writes the copy, a person or AI, the facts and their sources. Whichever you choose, the agent still checks every claim.

Job 4. The trust account month-end (1.75 hours a week)

How it runs now. Through the month Ellie receipts the rent as it lands in the trust account, nearly all of it by transfer or direct debit. The odd cash payment is banked by the end of the next business day. She pays owners and tradies out of trust. Within 5 business days of the month's end she reconciles the trust account against the cash book, the ledgers and the bank statement. She prints and files the hard copy of the ledger balances and the reconciliation, and sends owners their statements with the end-of-month payment. Dana reviews and signs. The auditor makes two unannounced examinations in each audit period as well as the year-end audit, and the report is due 4 months after the period ends, lodged on time by Dana as licensee. Ellie keeps the year's papers ready as she goes. About 7 hours a month, plus the audit.

	Fix without AI	What you already have: PropertyMe Bank Feeds
What it does	The month-end as a PropertyMe task checklist (on your Standard plan) with the 5-business-day deadline. The reconciliation PDF saved to a dated folder each month. An auditor's folder kept all year	Brings the trust bank account's transactions into PropertyMe so they match without keying them in. It's on your Standard plan. Yours is set up for the main trust account, but not the second one you opened for sales deposits
What's left for your staff	All the trust work, with nothing forgotten	Checking each match, the reconciliation, statements and sign-off

	Fix without AI	What you already have: PropertyMe Bank Feeds
Setting it up (my estimate)	About 3 hours	About 2 hours with PropertyMe's support
Where client details are kept	PropertyMe and your files, as now	PropertyMe, as now
Who checks	Ellie, and Dana signs	Ellie, and Dana signs
Limits	Stops steps being missed, but saves little time	Only the matching gets faster
Cost to start	$84 (3 hours of Ellie's time)	$56 (2 hours)
Cost a month	Nothing	Nothing (on your plan)
Hours back a week (my estimate)	0.25 to 0.5	0.25 to 0.5
Hours still spent a week	1.25 to 1.5	1.25 to 1.5
Saves a month, after costs	$30 to $61	$30 to $61
Pays back in	1.4 to 2.8 months	0.9 to 1.8 months

What I'd take from this: your trust month-end is already lean. Tidy it with a checklist and bank feeds, and keep AI out of the records.

All four jobs, without me

This is the total if you took the option that saves the most each month for each job. At your size that's the fix without AI every time (Tapi might beat it on repairs, depending on its quote).

	1. Repairs	2. Inspections	3. Listings	4. Month-end	Total
Option	Fix without AI	Fix without AI	Fix without AI	Fix without AI	
Cost to start	$177	$118	$88	$84	**$467**
Cost a month	Nothing	Nothing	Nothing	Nothing	**Nothing**
Hours back a week (my estimate)	0.75 to 1.25	1 to 1.5	0.5 to 0.75	0.25 to 0.5	**2.5 to 4**
Hours still spent a week	4.75 to 5.25	4.5 to 5	1.25 to 1.5	1.25 to 1.5	**11.75 to 13.25**
Saves a month, after costs	$96 to $159	$128 to $191	$64 to $96	$30 to $61	**$317 to $507**

The four jobs take 15.75 hours a week now. Without me, 11.75 to 13.25 are still spent.

9. Policy and staff

You need a written AI use policy (section 7). It should cover five things:

- what staff can and can't put into AI tools (no tenant, owner or buyer details in free tools)
- which tools the agency has approved
- the rule for photo edits
- who checks AI work before it goes out, and how that's recorded
- who's accountable (usually you, as licensee)

Staff. Everyone was keen, and nobody had been shown how to use AI safely. A short session once the policy's in place would cover what's allowed, how to check AI work, and where client details and photos can go.

PROMPT WORKS STUDIO

Your mail and accounts

Your email, your domain name and who can get into them sit under everything else in this report, so they get a page of their own. Your domain's public records were read from outside. On the day, you logged in and we went through the admin screens together. I didn't log in or take a password, nothing was changed, and no client mail or client files were opened.

What I looked at	What I found	Where it stands
Your domain name	It's in the agency's name, you can log in, and it renews in November 2027	OK
Where your mail goes	To Microsoft 365, on your own domain	OK
Proof your mail is really from you	SPF, DKIM and DMARC are all right, and DMARC is one step from the top	OK
Other things that send as you	Your website's contact form sends mail with your address on it and isn't set up to pass those checks. It could land in junk or bounce	Gap 1
Who looks after it	Nobody outside the agency. The agency signed up direct, so the account is yours	OK
Plan and licences	Business Standard, five licences, all in use	OK
Getting back in	Two admin accounts, and one's kept apart from everyday use	OK
Two-step sign-in	Microsoft's security defaults are on	OK
Mail protection	The built-in protection is on, and so are Microsoft's Standard settings	OK
Mail forwarded out	Set to Off, so automatic forwarding outside the agency is blocked	OK
One login a person	One account a person, and rentals@ is a shared mailbox. Nobody said they share a login	OK
People who've left	One unlicensed account can still sign in. There are no written steps for when someone leaves	Gaps 2 and 3
Where the screen says your data sits	Australia. That's as far as this page goes	Noted
Backup	You told me an outside product keeps a copy of your mail. I didn't see it	Noted

What this means for your security. Microsoft's own list for a small business starts with two-step sign-in and looking after admin accounts. Your settings cover both. Most of this page is in good order. Gap 2 is an account that can still get in, and your mail carries owners' and tenants' details, so that one's worth closing.

What I didn't look at. Your computers, phones, network, antivirus, firewall, files and folders. This isn't a security audit, and a clean row doesn't mean nothing can go wrong.

What I can't do. I don't work on a domain or account someone else holds, or on the things I didn't look at. If you think someone's already got into your accounts, you need an IT security firm. I'm not one.

What it costs to close these: with a real report, a separate quote comes with it. You don't need me for any of them. This page is yours, so you can take it to anyone you like, including an IT provider.

10. What I can do for you

Here's each job built in your own Claude account. A **Build** is me setting up a job in Claude with you, testing it, and training your people. Each job is priced at a **Tier**. Drafting, summarising or pulling details out is Tier 1, and review or analysis is Tier 2. Each job goes up one Tier for a figure you rely on, and one for work near a legal duty, up to Tier 3. I'd only take on jobs 1 and 2 (see below). Prices include GST.

My solution, job by job

	1. Repairs	2. Inspections	3. Listings	4. Month-end
What Claude does	When Kate or Jordan starts it in Claude, reads new requests and open jobs, sorts each against the Act's emergency list, and drafts the tenant reply, work order and any owner request	When Kate or Jordan starts it, lists who's due, plans runs and drafts each notice's details against the rules. After the visit, turns the notes into report comments and drafts the owner's email	Drafts the copy from the listing brief and marks every claim that needs a source	When Ellie starts it, keeps the month-end checklist and dates, drafts the owners' cover note (no figures in it), keeps the auditor's list
Who checks	Kate or Jordan confirms each sort, sends each draft, and creates the job in PropertyMe	Kate or Jordan checks each notice before issuing it, and each comment against the photos	Mitch, Kate or Jordan checks every claim	Ellie checks it, and Dana signs as now
Build	$4,200, Tier 2: sorting against the Act's fixed list is pulling details out (Tier 1), plus one for work near the emergency repair rules	$4,200, Tier 2: drafting, plus work near the entry notice rules	$5,500, Tier 3: judging which claims need a source is review (Tier 2), plus one for work near the rule on misleading claims	$4,200, Tier 2: drafting, plus work near the trust account rules
Hours back a week (my estimate)	2.75 to 3.75	2.75 to 3.75	0.75 to 1	0.5 to 0.75
Hours still spent a week	2.25 to 3.25	2.25 to 3.25	1 to 1.25	1 to 1.25

Client details stay in your agency's own Claude account, apart from what's below. Claude reads PropertyMe but doesn't write to it. PropertyMe says its AiMe Connect link is read-only and doesn't touch trust accounting. Before a Build, I'd check with PropertyMe that requests made in the tenant app show up through the link. If they don't, the property manager forwards them to the rentals inbox. I build it with you, train your staff on it, come back for a short follow-up session two to three weeks after it goes live, answer your questions free for 30 days, and check in at 3, 6 and 12 months. All of that is in the Build price.

What a Build needs

A Build runs in a Claude plan in your agency's name, under Anthropic's business terms. For an agency your size that's the Team plan: at least two seats, US$25 a seat a month billed monthly. Anthropic's pricing page says its prices don't include applicable tax, so GST goes on top. Two seats came to about $71 a month at the 30 October exchange rate, about $78 with GST on top, and that's the figure in the tables below. One seat is for Kate, who'd run it day to day, and one for you. Staff who only check a draft in Outlook don't need a seat.

Because these jobs handle tenants' and owners' details, each run happens on your Team plan, started by a named person. It can run in a Claude chat, in Cowork or in Claude Code, and I'll pick whichever suits the job. In Cowork I set it to stop and ask before each action. Nothing with names in it runs on its own on a timer. Claude reads your rent roll through PropertyMe's AiME Connect, which is on the Advanced plan: up to $99 a month more than Standard for 250 rentals. It brings Reply with AiMe and Bills AI with it (job 1).

Why a business plan rather than a free or Pro one: on the Free, Pro and Max plans, Anthropic may use what you type to train its models unless each person turns that off in their own settings, and I've found no agency-wide setting that lets you check they have. On Team and Enterprise it doesn't, by default.

You don't have a Claude plan now. Setting one up properly, with the privacy settings, your agency's context and your AI use policy inside it, is my **Set-up and Onboarding** service: $1,500 for an agency of 1 to 5 people. A Build runs in that plan, so I've put Set-up in the totals below.

Where your client files go

A common worry is client details going off to a server overseas, so here's the straight answer. Claude runs on Anthropic's servers in the United States and other countries, and anything the Build reads is processed there. On a Team plan, Anthropic doesn't use it to train its models by default, and your agency controls the account. Your clients' details don't come to me: I work inside your account with your named person present, and my data handling addendum, which comes with the Build agreement, sets out what can reach me (at most, file names in the reports your person sends, and only if you choose that, and those can carry tenants' or owners' names) and what never does. Inspection photos stay in PropertyMe, as section 3 needs. If the Privacy Act covers you (section 3), your privacy policy has to say that personal information goes overseas. Your adviser can tell you whether that reaches your rentals work as well as your sales. Before a Build starts, I sit with you and read Anthropic's terms for your plan, so the decision to put client details in is yours, made with the terms in front of you.

Your mail and accounts. With a real report, a separate quote for any gaps I can close comes with it. None of it counts in the 12-month test or the totals below.

Each job, counted on its own

I only take on a Build that pays for itself within 12 months, counted job by job. Each job carries its Build price plus a share of the costs the jobs in a Build split between them. Those are the $1,500 **Build fee** (paid once per Build, for preparing it) less your $750 **Audit credit** (what you paid for this Audit, if you go ahead within 90 days). They also include the $78 a month Claude plan and the $99 a month PropertyMe upgrade. In the two-job Build, jobs 1 and 2 carry half of each. If jobs 3 and 4 were added, each would carry a quarter of the fee and of the Claude plan and none of the PropertyMe upgrade, and jobs 1 and 2

would carry a quarter of the Claude plan and still half the upgrade. Set-up isn't in this test. It's its own service, with your policy and onboarding in it, and it's in the totals further down.

Job	Cost	Saves a month, after its share of the plans	Pays back in
1. Repairs (in a two-job Build, carrying half)	$4,575	$262 to $390	11.7 to 17.5 months
2. Inspections (the same)	$4,575	$262 to $390	11.7 to 17.5 months
3. Listings (if added, carrying a quarter)	$5,688	$76 to $108	52.7 to 74.7 months
4. Month-end (the same)	$4,388	$41 to $71	61.4 to 106.8 months

Jobs 1 and 2 pay for themselves within 12 months at the better end of my estimates, if only just. Jobs 3 and 4 don't, so I won't take those on until they would. At the low end they take up to 17.5 months, so the 3-month check-in looks at your real figures.

These are the least the time is worth, at the award minimum. If your people are paid more than that, every job pays back sooner than shown.

The totals side by side

	All four jobs, without me (section 8)	Jobs 1 and 2, with me	Jobs 1 and 2 with me, free fixes on 3 and 4	All four jobs, with me
Cost to start	$467	$10,650: two Builds, the Build fee less the Audit credit, and Set-up	$10,822	$20,350: four Builds, the same fee, and Set-up (shown only for the whole picture)
Cost a month	Nothing	$177 (Claude and PropertyMe)	$177	$177
Hours back a week (my estimate)	2.5 to 4	5.5 to 7.5	6.25 to 8.75	6.75 to 9.25
Hours still spent a week (of 15.75 now)	11.75 to 13.25	8.25 to 10.25	7 to 9.5	6.5 to 9
Saves a month, after costs	$317 to $507	$524 to $779	$618 to $936	$680 to $998
Pays back in	About a month	13.7 to 20.3 months	11.6 to 17.5 months	20.4 to 29.9 months
Catches up with "without me" after		37.4 to 49.2 months	24.2 to 34.4 months	40.5 to 54.7 months
Ahead after three years, after all costs	$10,953 to $17,783	$8,222 to $17,404	$11,436 to $22,857	$4,148 to $15,568

The fair comparison is the third column: jobs 1 and 2 with me, and the free fixes on jobs 3 and 4. Over three years it comes out ahead of the free fixes alone, and gives your property managers 3.75 to 4.75 more hours a week.

Prices

A Build, per job	Tier 1 $3,400, Tier 2 $4,200, Tier 3 $5,500, with follow-up, 30 days of questions and check-ins
Build fee	$1,500, once per Build, however many jobs are in it
The Audit credit	$750 off the Build fee if you go ahead within 90 days of this report
Claude Set-up and Onboarding	$1,500 for 1 to 5 people, $2,500 for 6 to 10
An AI use policy	$750. You don't have to use mine. Any provider's will do, or your own
Monthly tune-up (optional)	$750 a month, for up to 4 hours of checks and fixes to what's built

To start, reply to this report or call me, and we'll go through it together.

In 30 days I'll book a 20-minute call: what you've done, what's stuck. It's part of the Audit, whatever you choose.

This report is yours. Keep it, share it, take it to any provider.

It was drafted with AI (Claude) from my notes on the day, then checked and finalised by Chad Maxwell.