

## How to Attach a Strata Plan to a Property in REST Professional

### Overview

If you manage properties which form part of a strata plan, you can setup a strata plan which will enable you to record the strata plan contact details for properties and access the strata details directly from the property.

This document will cover:

- How to Add a New Strata Plan
- How to Attach a Strata Plan to a Property
- How to Report on your Strata Plans for your Properties

### How to Add a New Strata Plan

1. Go to Files > Strata Plan
2. Click on the Add Mode-F4
3. Enter the Details on the General Tab:
  - Plan Number - Enter the plan number for the strata. Strata Plans must be entered with a number only e.g. Strata Plan 4562 as 4562.
  - Name - Enter the name of the Strata Building e.g. Harbour Towers.
  - Address – Enter the address, up to 30 characters for each of these 3 lines.
  - Managing Agent - If the Strata is managed by a Strata Manager tick the 'Managing Agent' checkbox and enter the details of the strata manager and complete all the contact details. NOTE: If the Strata Plan is self managed leave this tick box unticked but complete the contact details

Strata Plan

Plan Number 13846

Name Bay Vista

General | Postal Address | Notes | Properties

Address Bay Vista  
25 Brosnan Place  
BRIGHTON LE SANDS NSW 2216

Managing Agent Strata Management United

Contact Details

Contact Martha Stewart

Salutation Martha

Work phone 02 9238 1345

Home phone

Mobile 0412 457 897

Fax 02 9877 1243

Email marthas@insidetradng.com.au

Cancel - ESC

Action - F1

Clear - F2

Delete - F3

Add Mode - F4

Search - F7

Last Edits - F9

OK - F12

4. Enter the details on the Postal Address Tab:

- Postal Address - Enter the address of the managing agent or the contact on the strata company committee that you will use for correspondence.
- Alternative Address line – Enter details of an alternative address up to 30 characters for each of these 3 lines. You could use this address if the building is on a corner block, it may be known under two addresses.

Strata Plan

Plan Number 13846

Name Bay Vista

General | Postal Address | Notes | Properties

Postal address GPO Box G1234  
MARTIN PLACE  
SYDNEY NSW 2000

Alternative address

Cancel - ESC

Action - F1

Clear - F2

Delete - F3

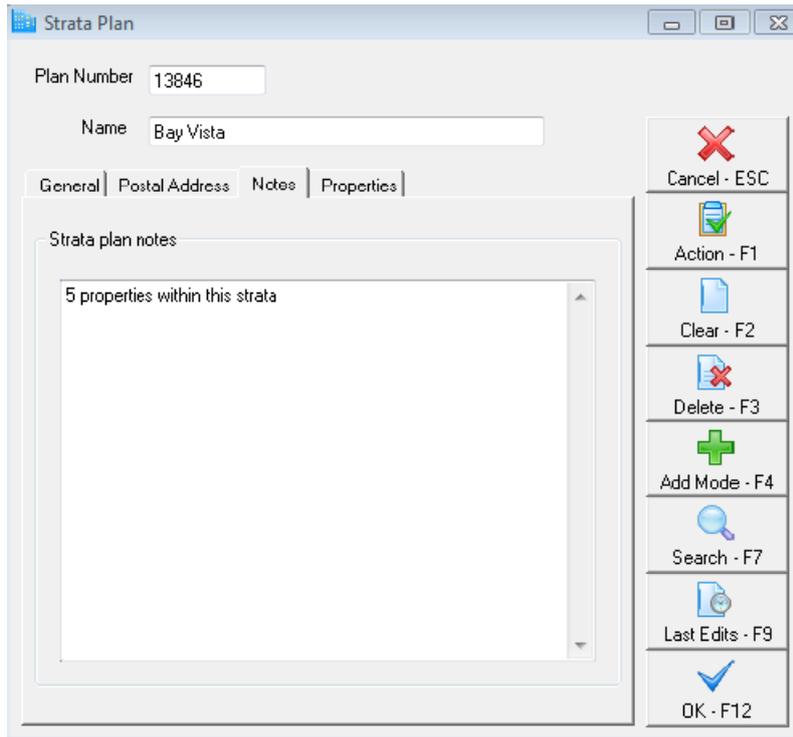
Add Mode - F4

Search - F7

Last Edits - F9

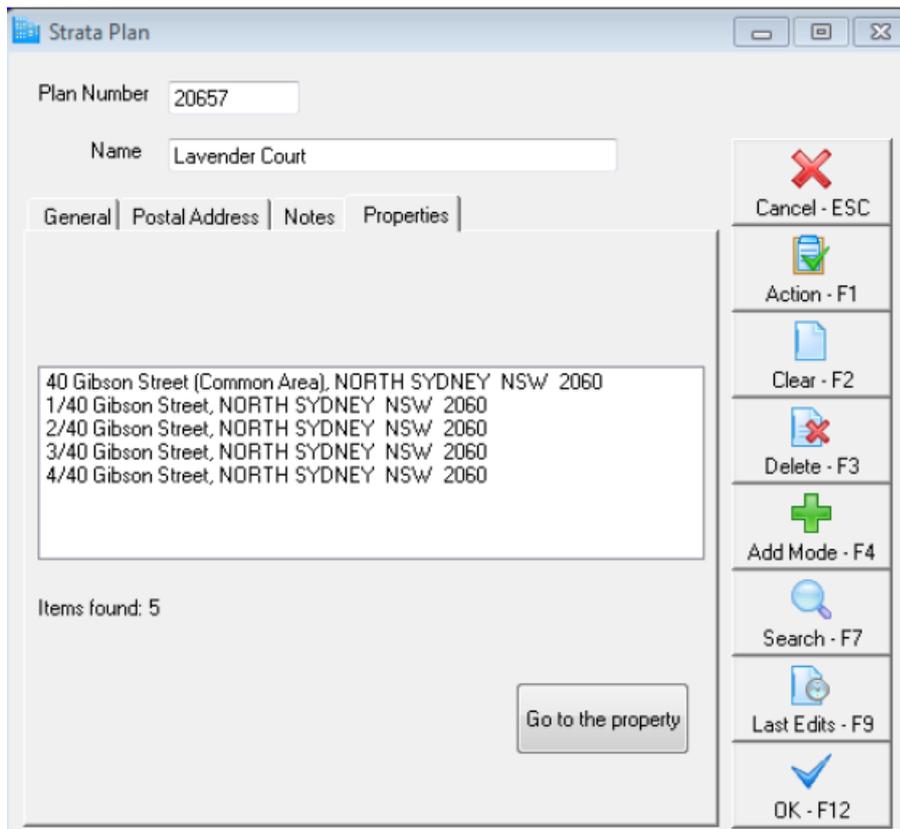
OK - F12

5. Enter the details on the Notes Tab - Enter any information about this Strata Plan that you wish to keep.



6. Details on the Properties Tab - A list of the properties attached to this strata plan is displayed. You may access any of the properties by either double clicking on the required property or by highlighting the property and selecting on the 'Go to the property' button

7. Click OK-F12



## How to Attach a Strata Plan to a Property

1. Go to Files > Property and put in the alpha index of the property and press ENTER
2. Go to the Strata tab and enter the Strata Plan Number and press ENTER. The strata contact details display in the Contact section. The Strata Plan must be set up in Strata Details before it can be linked to a Property. NOTE: Click on Name Search to search for the strata plan by the strata building name
3. Click OK-F12. NOTE: You can access the strata details at any time from the property card now. Click on Go to Strata to take you to the strata plan details. Click on Detach Strata if you want to remove details.

Property Details

Alpha index: GIBSON40/4      Active

Address: 4/40 Gibson Street

Suburb: NORTH SYDNEY      State: NSW      P/Code: 2060

Reminders | Gained/Lost | Maintenance | Other

General | Financial | Advert | Notes | Tenants | Commercial | **Strata** | Holiday | Insurance | Reg. Payments

Strata plan number: 13846      Name search      Go to strata plan      Detach Strata

Bay Vista

Contact

Managing Agent: Strata Management United

Contact: Martha Stewart  
GPO BOX G1234  
MARTIN PLACE  
SYDNEY NSW 2000

Work phone: 02 9238 1345  
Home phone:  
Mobile: 0412 457 897  
Fax: 02 9877 1243  
Email: mathas@insidetrading.com.au

Cancel - ESC  
Action - F1  
Clear - F2  
Delete - F3  
Add Mode - F4  
Search - F7  
Last Edits - F9  
OK - F12

## How Report on Strata Plans for your Properties

1. Go to Reports > Property > Strata Plan Report
2. Select a Manager if you prefer
3. Select the specific Class if applicable

Strata Plan Report

**Selection**

All

Range      Start at Alpha Index:      Finish at Alpha Index:      Select:     

**Advanced**

Manager: All      Class: All

Orientation - F1      Font Select - F2      Printer Select - F3      Print - F12      Preview - F11      Export - F10      Cancel - ESC

4. Click Preview-F11
5. Note: For any Strata Plans recorded with 'See file for email' this is due to the Strata Plan email address being more than 22 characters. Please view the Strata Plan directly for this information.

STRATA PLAN REPORT

For All Managers

From: 000000 to: ZZZZZZZZZZ - All Properties

Number	Name & location	Contact details	
13846	Bay Vista Bay Vista 25 Brosnan Place BRIGHTON LE SANDS NSW 2216 Properties: BROS25/3 3/25 Brosnan Place, BRIGHTON LE SANDS NSW 2216 WYLDE3A 3A Wylde Street, POTTS POINT NSW 2011 BROS25/11 11/25 Brosnan Place, BRIGHTON LE SANDS NSW 2216	Strata Management United Martha Stewart GPO BOX G1234 MARTIN PLACE SYDNEY NSW 2000	W: 02 9238 1345 M: 0412 457 897 F: 02 9877 1243 See file for email
20657	Lavender Court Lavender Court 40 Gibson Street NORTH SYDNEY NSW 2065 Note: See file for alternative address Properties: GIBSON40 40 Gibson Street (Common Area), NORTH SYDNEY NSW 2060 GIBSON40/1 1/40 Gibson Street, NORTH SYDNEY NSW 2060 GIBSON40/2 2/40 Gibson Street, NORTH SYDNEY NSW 2060 GIBSON40/3 3/40 Gibson Street, NORTH SYDNEY NSW 2060 GIBSON40/4 4/40 Gibson Street, NORTH SYDNEY NSW 2060	Strata Master Management Tom Jones P O BOX 451 SOUTH PERTH WA 7005	W: 9966 0900 H: 9966 0911 M: 0416 631 700 F: 9966 0922 See file for email
27014	Esmerelda Esmerelda 2A Wylde Street POTTS POINT NSW 2011 Note: See file for alternative address Properties: WYLDE2A 2A Wylde Street, POTTS POINT NSW 2011	Better Strata Management Robert Van Kriek PO Box 1624 POTTS POINT NSW 2011	W: (02) 9966 0125 M: 0414 914 576 F: (02) 9966 1573 See file for email

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