

Merging Duplicate Owner Cards Strata Master

When Lot Owners have more than one Lot, they may be linked to One Owner Card. This allows contact details to be updated on more than one Lot in one process.

Although at times a Lot Owner may wish to have separate cards as the contact details may vary, it may occur that a Lot Owner has more than one card. This would cause out dated differences in contact details. This can occur when the Lot Owner purchases a further Lot, and when entered as new owner, a search is not made to see if the owner already exists in the database.

This article shows you how to -

- check the list of owners with more than one card
- merge any duplicate cards

Where to find the Cards List

Select 'Manage' in the top toolbar > select 'Contacts'



Checking the List

1. The screen that opens shows a number of checks that can be made. For this purpose, select the 'Potential duplicate owner-type contacts'. If you have a very large portfolio, run checks by individual owner corporation, otherwise select Entire portfolio. The list will not differentiate what Plan the card relates to as it will be looking at duplicates across all plans.

Potential duplicate owner-type contacts C Real estate agents & public sector agencies C Individual owners corporation C Building Managers C Entire portfolio C Other agent contacts Unused owner-type contacts C All contacts used as agents ID Name First Name Other Name Title Salutation Addit contact d Franchise		2 📔 🖪 📚						
C All contacts used as agents	⊂ Indivi ເ∙ Entire	dual owners corporation portfolio	C Building Ma	anagers	or agencies			
ID Name First Name Other Name Title Salutation Addit contact d Franchise	Unused own	ier-type contacts	C All contacts	s used as agents				
	D	Name	First Name	Other Name	Title	Salutation	Addtl contact d	Franchise

2. Click the search binoculars



3. The next message allows you to back out of a long search selection. This message will come up even when the search will be quick, such as 5 seconds.

Strata Master	×
This function can take a l Do you wish to proceed?	long time if there are many contacts.
	Yes No

4. The list opens



5. Scroll across to the contact information

Manage Owner Contac	cts, Real Estate Agen	ts & Building Ma	anagers				
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Potential duplicate owner	-type contacts C Re	al estate agents &	public sector age	encies			
Individual owners o Entire portfolio Unused owner-type conta	. Сви С ОН	ilding Managers ner agent contacts					
onded onner gpo conte		contacts used as a	agents				
Street No.	Street Name	Town	State	Postcode	Home Phone	Work Phone	Mobile
Street No.	Street Name Calisota Street	Town Duckburg	State NSW	Postcode 2099	Home Phone	Work Phone	Mobile 0428 698
Street No.					Home Phone	Work Phone	
Street No.	Calisota Street	Duckburg	NSW	2099	Home Phone	Work Phone	0428 698

6. Check the contact information. If you decide to merge 2 cards, you need to open one card for the Lot Owner and add/edit details so it is complete and current. To do this click Edit button then edit the card as necessary. Then, very importantly, tick the card as Primary Contact.

	Contact type Owner	-]	
	Business 🗖	Primary contact	7	
	Title Mr 💌	Salutation		
	Surname Donald Duck			
	First name			
	Other names			
st Office address		Primary contact details Home phone		-
Building name Mickey's Mansion				-
Unit/Street no. 1			0428 698968	-
Street Calisota Street		- Fax	0420 030300	-
Town/Suburb Duckburg		- Email address		
State NSW	Postcode 2099	- Email address	1	
Country	Postcode (2000	-		
Country				
dditional contact details				
Type Notes	L M C Va	lue		
				+
Type Notes	L M C Va	lue		

7. Click Save



8. The adjusted card now has a tick to show it is the primary card.

Potential du C Indivi @ Entire	Dicate owner-type cont dual owners corporation e potrfolio	acts C Real estat C Building M C Other age	anagers	tor agencies			
ID	Name	First Name	Other Name	Title	Salutation	Addtl contact d	Franchise
✓ 165 166	Donald Duck Donald Duck						
106	Kewell	Harry		Mr			
167	Kewell	Harry		Mr			
<							

9. Click the Save button which is now the 'consolidate' button (ensure the consolidate duplicates shows when you hover over the save button).

🗗 Manage Owner Co	ontacts, Real Estate Agents & Building
🚥 📄 📝 🖡	1 🗈 🔌 🔯 🏔
	Consolidate Duplicates <- (F3)

10. The Lot Owner cards updated and consolidated disappear from the list as they are no longer duplicates. You can then proceed to examine any other duplicates on the list.



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