

Adding an Agent or Building Manager in Strata Master

The agent contact list is accessed when adding a new owner who has an agency managing their property, or when an owner occupier decides to rent their Lot.

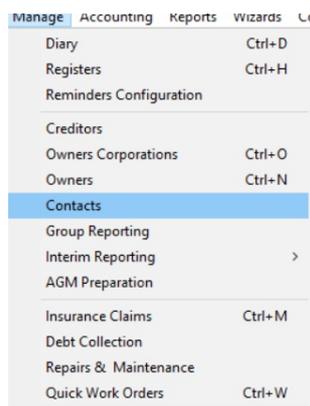
This article will show you how to -

- check the list of agents or building managers
- add an agent/agency or building manager if not found on the list

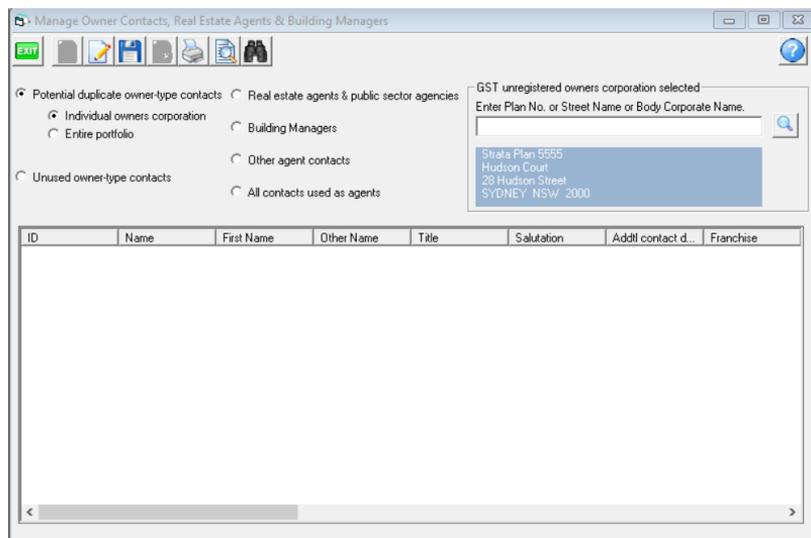
We will show the process for Agents/Agency, as Building Managers is the same process, in the same location, except that 'Building Managers is selected'.

Accessing the List

1. Select 'Manage' from the top toolbar of Strata master > select 'contacts'



2. This opens the Manage Contacts screen



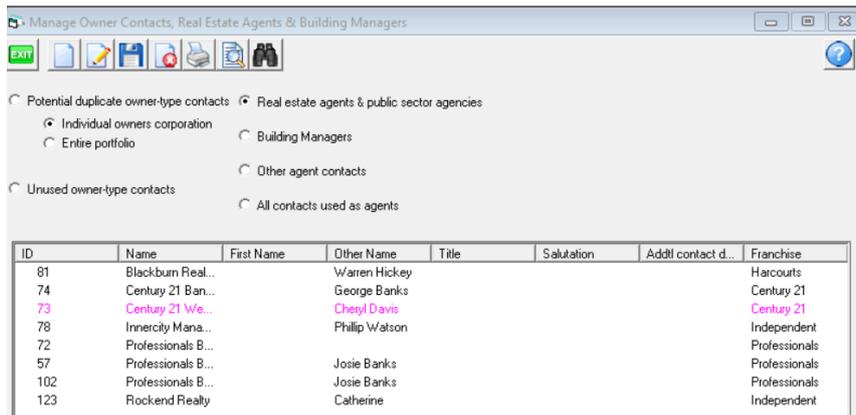
3. Place the button against 'Real estate agents'. For Building Managers, place the radio button on 'Building Managers'.



4. Click the search binoculars



5. The list shows



6. If the agency you require shows on the list, you are able to close this screen and go to the Lot Owner card in Corp and link the agency to the Lot.

7. If the agency does not appear on the list you will need to add.

Adding An Agency

8. Click the 'add' button. The contact editor screen will open.



Contact Editor

EXIT [Back] [Save]

Contact type: Real Estate Agent (dropdown)
 Business:

Salutation: [Text Field]

Franchise: [Text Field]
 Business: [Text Field]

Contact name: [Text Field]

Post Office address:

Building name: [Text Field]
 Unit/Street no.: [Text Field]
 Street: [Text Field]
 Town/Suburb: [Text Field]
 State: [Text Field] Postcode: [Text Field]
 Country: [Text Field]

Primary contact details:

Telephone 1: [Text Field]
 Telephone 2: [Text Field]
 Mobile: [Text Field]
 Fax: [Text Field]
 Email address: [Text Field]
 Levy Email Address: [Text Field]
 Website: [Text Field]

9 Enter information as required

Contact Editor

EXIT [Back] [Home]

Contact type: Real Estate Agent

Business:

Salutation: _____

Franchise: _____

Business: Harry Houdini Houses

Contact name: Mary Jones

Post Office address:

Building name: City Escape

Unit/Street no.: 59

Street: Reappear Street

Town/Suburb: MELBOURNE

State: VIC Postcode: 3000

Country: Australia

Primary contact details:

Telephone 1: 03 9556 9556

Telephone 2: _____

Mobile: _____

Fax: _____

Email address: office@hhhouses.com

Levy Email Address: accounts@hhhouses.com

Website: _____

10. Click Save



11. Check the list. The agency will show in magenta until linked to a Lot.

174	Harry Houdini H...	Mary Jones	
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12. You can now go to the relevant Lot Owner in Corp screen and link the agency to the Lot.