

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

Image: Section of the sector agencies
Image: Second state of the state second s
C Unused owner-type contacts C All contacts used as agents D Name First Name Other Name Title Salutation Addit contact d Franchise
ID Name First Name Other Name Tite Salutation Addit contact d Franchise

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

	🖎 Manage Owner Contacts, Real Estat	te Agents & Building Managers	
	Potential duplicate owner-type contacts	Real estate agents & public sector agencies Building Managers	
4. Click the search	n binoculars		
		#	

5. The list shows

🔂 Manage Owner Contacts, Real Estate Agents & Building Managers						
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Potential duplicate owner-type contacts Preater agents & public sector agencies Individual owners corporation C Entire portfolio Dther agent contacts O Unused owner-type contacts All contacts used as agents						
ID Name	First Name	Other Name	Title	Salutation	Addtl contact d	Franchise
81 Blackburn	Real	Warren Hickey				Harcourts
74 Century 21	Century 21 Ban		George Banks			Century 21
73 Century 21	Century 21 We		Cheryl Davis			Century 21
78 Innercity M	Innercity Mana		Phillip Watson			Independent
72 Professiona	als B					Professionals
57 Professiona	als B	Josie Banks				Professionals
102 Professiona	ils B	Josie Banks				Professionals
123 Rockend F	ealty	Catherine				Independent

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.

5 Contact Editor			×
	Contact type Real Estate Age Business 🔽	ent 🗨	
		Salutation	
	Franchise		
	Business		
	Contact name		
Deal Office editions		Primary contact details	
Post Uffice address		Telephone 7	
Linit/Street no		Mobile	
Church		- Env [
Street		Empil address	
Chate	Pastanda	Leun Emeil Address	
Caumbu	Los(code	- Levy Email Address	
country			
		Website	

9 Enter information as required

5. Contact Editor					×
• •					
		Contact type	Real Estate Agent	-	•
		Business	V		_
			S	alutation	-
		Franchise		,	-
		Business	Harry Houdini Hous	es	_
		Contact name	Mary Jones		
			,	Primary contact details	
Post Office address				Telephone 1	03 9556 9556
Building name	City Escape			Telephone 2	
Unit/Street no.	59			Mobile	
Street	Reappear Street			Fax	
Town/Suburb	MELBOURNE			Email address	office@hhhouses.com
State	VIC	Postcoo	ie 3000	Levy Email Address	accounts@hhhouses.com
Country	Australia				
	,			Website	

10. Click Save



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

	and the second s	
174	Harry Houdini H	Mary Jones
70	1 N K3	manner station

12. You can now go to the relevant Lot Owner in Corp screen and link the agency to the Lot.

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