



Edit an Agent Contact Card in Strata Master

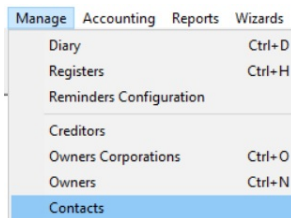
Summary

When a Lot Owner has an Agent managing their Lot, the details of the Agent appears on the Lot Owner Card. Learn how to edit these Agent details when they need updating.

Note - the edit is not made in the Lot Owner card.

Navigate To The Agent Card

1. Select 'manage' in the top toolbar and then 'Contacts' from the drop down list.



2. Select the radio button beside 'Real estate agents & public sector agencies'.



3. Click the search binoculars.

Edit The Agent Card

1. You may have multiple cards for the same agency, as in screenshot below. You may need to edit each of the cards for that Agency.

57	Professionals B...	Josie Banks	Professionals
102	Professionals B...	Josie Banks	
103	Professionals B...	Josie Banks	

2. Double click on the required card and open it.

The screenshot shows a 'Contact Editor' window with the following fields and values:

- Contact type: Real Estate Agent
- Business:
- Primary contact:
- Salutation: (empty)
- Franchise: (empty)
- Business: Inncity Management
- Contact name: Phillip Watson
- Post Office address:
- Building name: (empty)
- Unit/Street no.: 200
- Street: Sussex Street
- Primary contact details:
 - Telephone 1: 9419 4225
 - Telephone 2: (empty)
 - Mobile: (empty)
 - Fax: 9419 2444

3. Edit the card details as required and click the save button.

4. Check that the change has saved in the Lot screen. Navigate to the Corp > Lots > select the relevant Lot > select the Agent/Tenant/Leases tab and note the updated details.

Useful Links

Using Existing Contact Cards illustrates use of existing contact cards with a Lot Owner as an example

You may also wish to Merge a contact card with another card that is considered a duplicate. The article also shows where you can view to which Lots the contact cards are linked.

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