



# Merge Duplicate Agent Contact Cards in Strata Master

## Summary

Agent contact cards are linked to Lots where there is an Agent managing a tenant in the property. Learn to merge contact cards in particular agent contact cards.

This article covers:

- List of Lots With Attached Agent Cards
- Accessing the Agent Cards
- Updating the Agent Card Linked in the Lot Card
- Marking Unrequired Cards Before Deleting

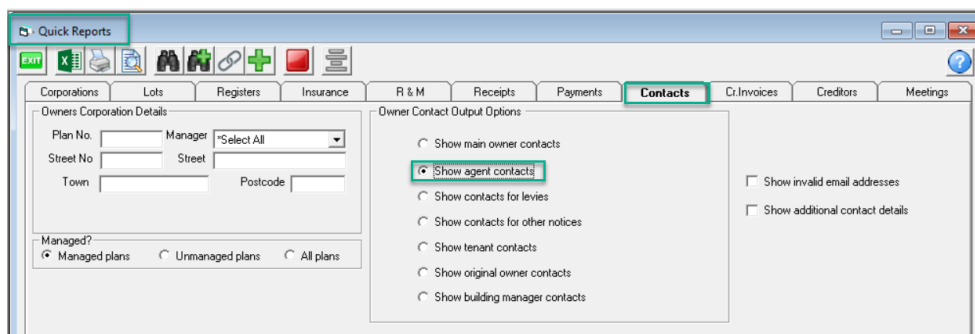
## Overview

If you have duplicate agent cards, these add to the agent list when you are updating a card. You can find yourself updating multiple cards and potentially omitting one. In addition, the list of agents becomes far larger than is practicable in a busy office. This also adds to the size of the data file your office is managing.

## List of Lots With Attached Agent Cards

Firstly it is important to focus on one Agent and secure a list of Lots that are linked to that agent.

1. Navigate to the Contacts tab in Quick Reports and select 'show agent contacts'.



2. Click the search binoculars.

3. Click on the header called 'Surname/Business Name' to group together all the Lots with Agents.

LotID	Plan #	Address for ...	Lot #	Name on title	Surname/business Name	First name	Other names	Title	Salutation	Business	Franchise	Building	P
5	4444	Chandos Str...	5	Rae Lasagna	Professionals Bankstow		Josie Banks			True	Professionals		
10	4444	Chandos Str...	10	Anthony Car...	Professionals Bankstow		Josie Banks			True	Professionals		
1124	5555	Hudson Stre...	2	Jane Turner	Professionals Bankstow					True	Professionals		
1129	5555	Hudson Stre...	7	Eric Bana	Professionals Bankstow		Josie Banks			True	Professionals		
1566	6666	Sportsman ...	3	Kimi Raikko...	Professionals Bankstow		Josie Banks			True			
1571	6666	Sportsman ...	8	Valentino R...	Professionals Bankstow		Josie Banks			True			
1126	5555	Hudson Stre...	4	Russell Crowe	Innercity Management		Philip Watson			True			
1565	6666	Sportsman ...	2	Leyton Hewitt	Innercity Management		Philip Watson			True			
1573	6666	Sportsman ...	10	Sтивен Wa...	Innercity Management		Philip Watson			True			
1867	7777	Oscar Street...	8	Halle Berry	Innercity Management		Philip Watson			True			
4	4444	Chandos Str...	4	Sarah Martin...	Century 21 Bankstow		George Banks			True	Century 21		L
1127	5555	Hudson Stre...	5	Naomi Walts	Blackburn Real Estate		Warren Hic...			True			P
1567	6666	Sportsman ...	4	Harry Kewell	Blackburn Real Estate		Warren Hic...			True			P
1869	7777	Oscar Street...	10	Viggo Morte...	Blackburn Real Estate		Warren Hic...			True			P

Note the repetition of Agency contact in the 'other names' column, in the example above.

In the screenshot above, you can clearly see that ILotID1124 has a blank in 'Other Names' where the other options have Josie Banks. This indicates a separate card. ILotID's 1566 and 1571 are both missing Franchise details, so these will be possibly be the same card and definitely are separate to the other listings.

4. Scroll across to check other columns and in particular note differences. Your aim will be to create 1 or 2 agent cards for Professionals Bankstow will completed fields.

## Accessing the Agent Cards

1. Navigate to the Manage > Contacts > Real Estate agents and public sector agencies screen.
2. Click the search binoculars.

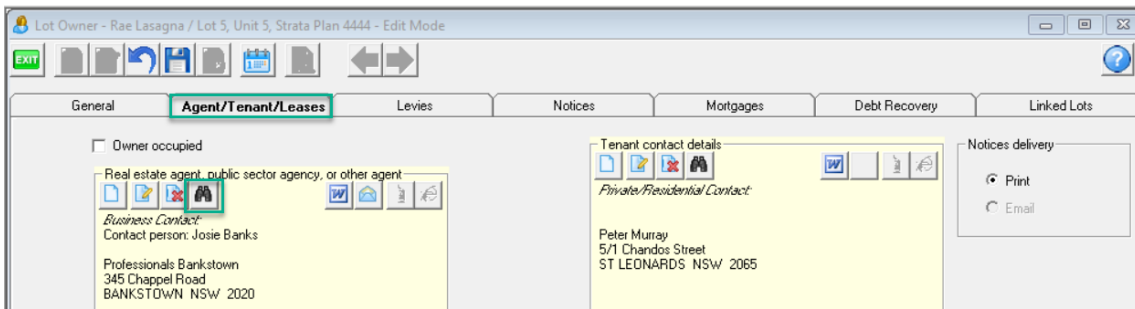
In the example below you will see 3 different cards linked to 6 different Lots/Plans where ideally you want to minimise the cards.

ID	Name	First Name	Other Name	Title	Salutation	Addtl contact d...	Franchise
154							Test
81	Blackburn Real...		Warren Hickey				
74	Century 21 Ban...		George Banks				Century 21
73	Century 21 We...		Cheryl Davis				Century 21
78	Innercity Mana...		Phillip Watson				
72	Professionals B...						Professionals
57	Professionals B...		Josie Banks				Professionals
102	Professionals B...		Josie Banks				
123	Rockend Realty		Catherine				

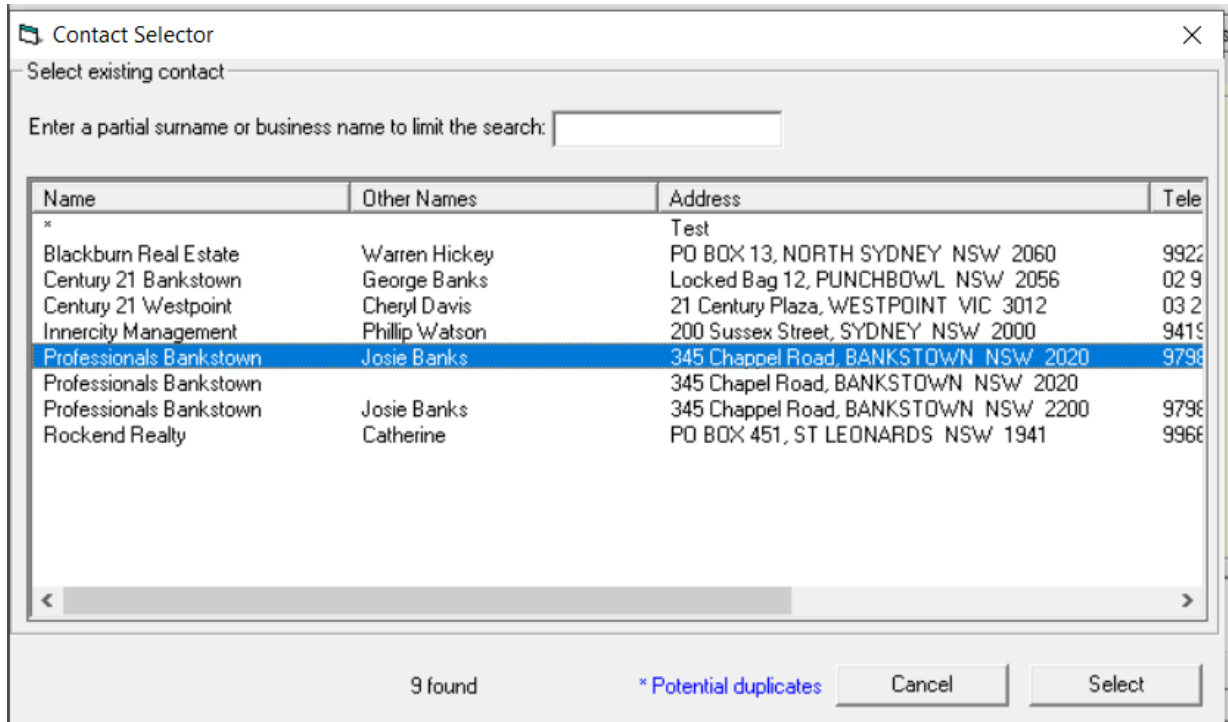
3. Select one card to keep and include all relevant details. Take note of the ID number and the details that show it is complete as you will need to identify it in the next step.

## Updating the Agent Card Linked in the Lot Card

1. Using the list in Quick Reports at point 3 in the List of Agents with Lots Attached, go to each Lot and click edit, and then the binoculars on the Agent/Tenant/Leases tab.



2. Select the complete card that you wish to keep, and click 'Select'.

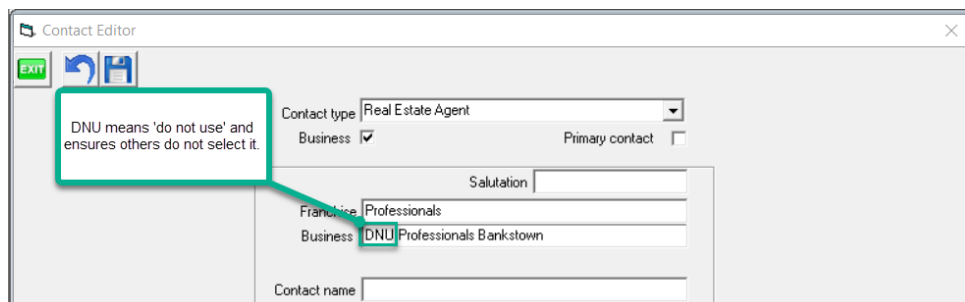


3. Click Save in the Lot card.

4. Continue with each Lot as required.

## Marking Unrequired Cards Before Deleting

Finally, return to the Manage > Creditors > Real Estate agents screen. We recommend marking each unwanted card and leaving in place for a short time before deleting. Markings such as DNU in the name will suffice. This also ensures you have time to identify whether you have selected the wrong card in Lots.



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