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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'.

B · Quick Reports		
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Corporations Lots Registers Insurance	R & M Receipts Payments Contact	s Cr.Invoices Creditors Meetings
Owners Corporation Details	Owner Contact Output Options	
Plan No. Manager "Select All Street No Street Town Postcode Managed? Managed? Managed plans C Ummanaged plans C All plans	 Show main owner contacts Show agent contacts Show contacts for levies Show contacts for other notices Show tenant contacts Show original owner contacts Show building manager contacts 	 Show invalid email addresses Show additional contact details

2. Click the search binoculars.

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

ILotID	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 Bankstown	_	Josie Banks			True	Professionals		_
10	4444	Chandos Str	10	Anthony Car	Professionals Bankstown		Josie Banks			True	Professionals		
1124	5555	Hudson Stre	2	Jane Turner	Professionals Bankstown					True	Professionals		
1129	5555	Hudson Stre	7	Eric Bana	Professionals Bankstown		Josie Banks			True	Professionals		
1566	6666	Sportsman	3	Kimi Raikko	Professionals Bankstown		Josie Banks			True			
1571	6666	Sportsman	8	Valentino R	Professionals Bankstown		Josie Banks			True			
1126	5555	Hudson Stre	4	Russell Crowe	Innercity Management		Phillip Watson			True			
1565	6666	Sportsman	2	Leyton Hewitt	Innercity Management		Phillip Watson			True			
1573	6666	Sportsman	10	Steven Wa	Innercity Management		Phillip Watson			True			
1867	7777	Oscar Street	8	Halle Berry	Innercity Management		Phillip Watson			True			
4	4444	Chandos Str	4	Sarah Marin	Century 21 Bankstown		George Banks			True	Century 21		L.
1127	5555	Hudson Stre	5	Naomi Watts	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 Bankstown 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.

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	plicate owner-type contac	ts 🔎 Real estate	agents & public secto	or agencies			
C Entire	idual owners corporation e portfolio	C Building Ma	anagers				
		C Other agen	t contacts				
Unused owr	h						
Chased own	her-type contacts	C All contacts	s used as agents				
ID	Name	C All contacts	s used as agents	Title	Salutation	Addtl contact d	Franchise
			-	Title	Salutation	Addtl contact d	Franchise Test
ID			-	Title	Salutation	Addtl contact d	
ID 154	Name		Other Name	Title	Salutation	Addtl contact d	
ID 154 81	Name Blackburn Real		Other Name	Title	Salutation	Addtl contact d	Test
ID 154 81 74	Name Blackburn Real Century 21 Ban		Other Name Warren Hickey George Banks	Title	Salutation	Addtl contact d	Test Century 21
ID 154 81 74 73	Name Blackburn Real Century 21 Ban Century 21 We		Other Name Warren Hickey George Banks Cheryl Davis	Title	Salutation	Addtl contact d	Test Century 21
ID 154 81 74 73 78	Name Blackburn Real Century 21 Ban Century 21 We Innercity Mana		Other Name Warren Hickey George Banks Cheryl Davis	Title	Salutation	Addtl contact d	Test Century 21 Century 21
ID 154 81 74 73 78 72	Name Blackburn Real Century 21 Ban Century 21 We Innercity Mana Professionals B		Other Name Warren Hickey George Banks Cheryl Davis Phillip Watson	Title	Salutation	Addtl contact d	Test Century 21 Century 21 Professionals

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.

Lot Owner - Rae Lasa	gna / Lot 5, Unit 5, Strata Plar	n 4444 - Edit Mode				
General	Agent/Tenant/Leases	Levies	Notices	Mortgages	Debt Recovery	Linked Lots
Rusiness C Contact pe Professiona 345 Chapp	agent, public sector agency, o antact: son: Josie Banks Is Bankstown	r other agent	Private/Fr Private/Fr Peter Mul 5/1 Chan	ontact details Peolodential Contact: Iray doos Street IARDS NSW 2065	M M	Notices delivery

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

C	3. Contact Selector			×		
Г	Select existing contact					
	Enter a partial surname or business name to limit the search:					
	Name	Other Names	Address	Tele		
	* Blackburn Real Estate Century 21 Bankstown Century 21 Westpoint Innercity Management Professionals Bankstown Professionals Bankstown Professionals Bankstown Rockend Realty	Warren Hickey George Banks Cheryl Davis Phillip Watson Josie Banks Josie Banks Catherine	Test PO BOX 13, NORTH SYDNEY NSW 2060 Locked Bag 12, PUNCHBOWL NSW 2056 21 Century Plaza, WESTPOINT VIC 3012 200 Sussex Street, SYDNEY NSW 2000 345 Chappel Road, BANKSTOWN NSW 2020 345 Chappel Road, BANKSTOWN NSW 2020 345 Chappel Road, BANKSTOWN NSW 2020 PO BOX 451, ST LEONARDS NSW 1941	9922 02 9 03 2 9415 9796 9796		
	<			>		
		9 found	* Potential duplicates Cancel 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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EXIT			
	DNU means 'do not use' and ensures others do not select it.	Contact type Real Estate Agent Business Primary contact	
		Salutation Franchise Professionals	
		Business DNU Professionals Bankstown	
		Contact name	

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