Account Manager Edit

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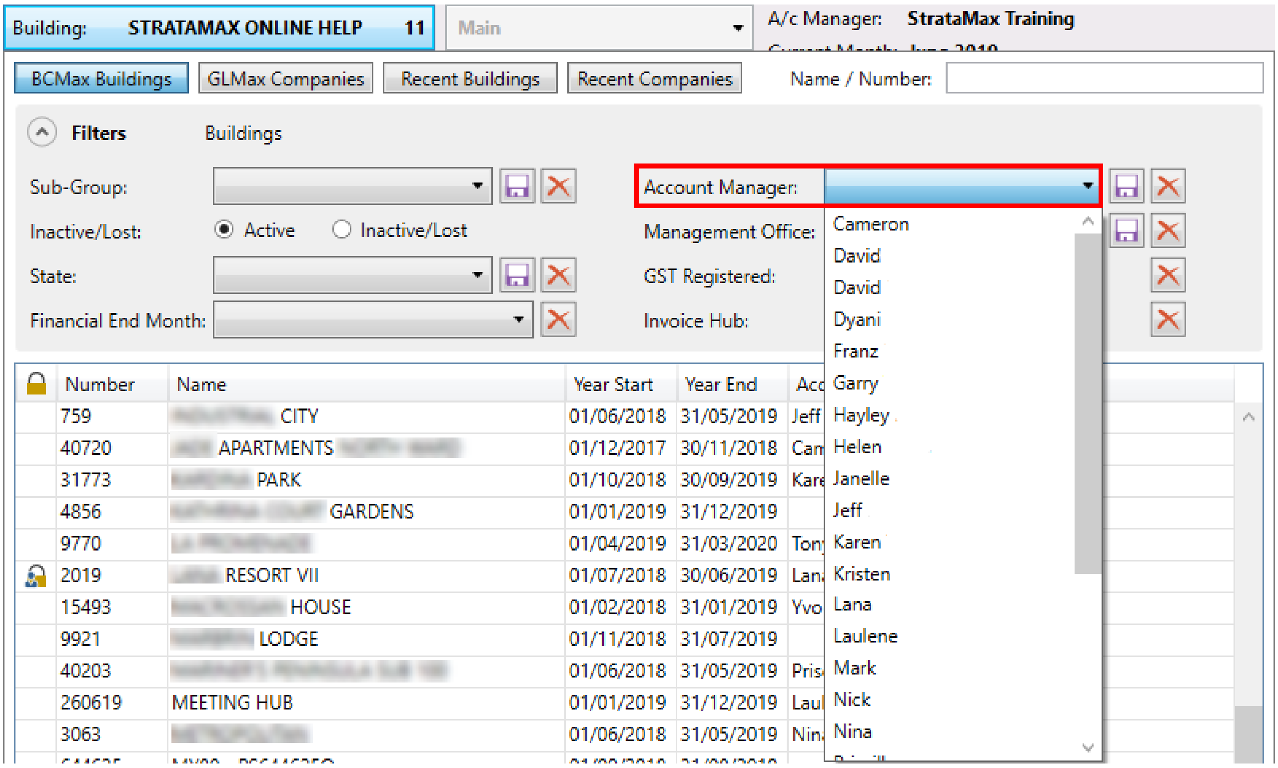
The instructions in this article relate to ***Account Manager Edit.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Account Manager Edit is where account managers in StrataMax are created, edited, and deleted. Once set up, the account manager will become either an option for selection in several screens throughout StrataMax, or visible in various reports.

The ***Building Information*** screen also has a field to select the account manager for that building, which is populated from the ***Account Manager Edit*** screen. The manager will then be included in various reports and use account managers as filters so you can easily produce a report for a particular manager's buildings, or to sort information in group reports into batches of the account manager.

For instance, within the *Building Selector Tool*, in the **Filters** there is an *Account Manager* drop-down, which will display only buildings belonging to the account manager selected. This is intended to make it quicker and easier for a strata manager to work within their own portfolio.



Creating an Account Manger

The following instructions will create an account manager record to be selected in the 'Account Manager' field in ***Building Information***.

1. Search or select ***Account Manager Edit***.
2. Click the *Add* button.
3. Enter the details in the required fields.
4. Enter the *Name* as you wish it to appear in reports and on the Account Manager name list in ***Building Information***.
5. The *Email* entered will be printed in some reports where the email address of the account manager is needed.
6. Enter the *Phone* number if required.
7. The *Signature* is populated by creating a new signature by clicking on the pencil icon. However, this is only needed if this account manager has bank approval to print their signature on cheques for their buildings. Go to the *Add Signature* section below to learn more.
8. Enter *Work Group* if applicable.
9. The *SMA License* field is used for NSW StrataHub submissions. You must check the license number entered here matches the license number entered for your profile on the NSW Strata Hub. For more information, see *NSW Strata Hub | API Subscription Credentials & Configuration*
10. Click *OK.*

Editing an Account Manager

1. Search or select ***Account Manager Edit***.
2. Select the account manager name to edit.
3. Update the information as required, then click the *Save* button.

Deleting an Account Manager

Deleting an Account Manager will remove the manager from the list that is used in***Building Information***. It will not remove them from any buildings that is currently set to them.

1. Search or select ***Account Manager Edit***.
2. Highlight the Account Manager name to delete, then click the red cross
3. When asked: 'Delete account manager?' click on *Yes.*

Adding a Manager to selected buildings

Once an account manager has been created, you can assign him/her to multiple buildings at once. This is done through ***Building Information***.

1. Search or select ***Building Information***.
2. Search for Account Manager field.
3. In the list that appears, select the required account manager from the drop-down list.
4. Using the *Copy to Buildings* button uses the building selection list to assist with tagging a specific group of buildings or use the filters.

Add a Signature

To affix a signature to an account manager, which can be included in the Funds Management Report (NSW only), the signature must be included in a Word document and attached to the manager record.

1. Create and scan the signature at high resolution. If the signature is a PDF, select the signature and copy it to a Word document.
2. Save the document to a known file location.
3. Search or select ***Account Manager Edit***.
4. Select the manager who requires a signature, which will expand to display the signature field. Click the pencil icon.
5. Select *New,* navigate to the Word document saved with the signature, and click *Open*.
6. This will convert the Word document to the StrataMax file format. Highlight this and click *Select.*
7. You can preview the signature with the magnifying glass icon if desired.

> If the signature needs to be edited again, delete the signature first with the red cross icon and start again from step 4 onwards.

Delete a Signature

Use the instructions below to delete a signature. If the signature needs to be edited after it has been affixed, you must first delete it before you can edit the existing record.

1. Search or select ***Account Manager Edit***.
2. Select the account manager's name to expand the record.
3. Click the red cross icon to remove the signature. This will update the field note from a Yes to No once removed.