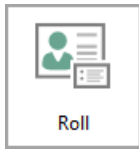


Roll | Transfer Agent Portfolio

Last Modified on 26/07/2023 2:47 pm AEST



The instructions in this article covers how to transfer/merge a Real Estate Agents portfolio to another Real Estate Agent. This function was designed to be used when a Real Estate Agent sells their portfolio or part of it to another agent. This function is located in the **Roll** screen. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

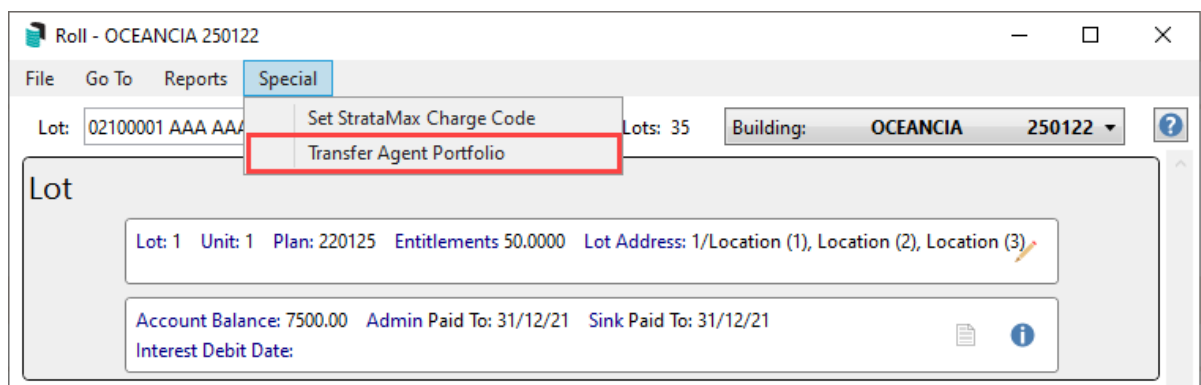
Security Permissions

To use the function Transfer Agent Portfolio; the user must have access to the security permission *Roll Transfer Agent Portfolio* which is under the Roll category.

Transferring a Portfolio

To transfer a Real Estate Agents portfolio; if the Real Estate Agent taking over the portfolio is not already created as a contact a contact card must be created for the agent in [Roll Master Editor](#). Follow the below steps to transfer a portfolio or part of:

1. Search or select **Roll**.
2. Select a lot or cancel.
3. Click Special, then *Transfer Agent Portfolio*.



4. Select the Selling Agent.
5. Select the Agent that will now be managing the lots (this will commonly be the purchasing agent).
6. All lots managed by the Agent will automatically be tagged; untag any lots of they should be not updated.

7. Select Transfer.

The original *Date of Receipt of Notice* and *Date of Appointment* will be retained within the roll records.

Transfer Agent Portfolio

Transfer an agent portfolio to another agent

Selling Agent. This is the agent that will be replaced in current Roll

#Gold Coast Holiday Rentals
 PO Box 1501
 SURFERS PARADISE QLD 4217

This is the agent that will replace the current roll record

ABC Property Specialists
 PO Box 1001
 Varsity QLD 4220

abc@email.com 03 7777 2345
 info@abcprops.com.au 03 9876 1234
 03 1234 9876 0412 987 123

Tag	Building #	Building Name	Lot	Unit
✓	107024			
✓	16282			
✓	16282			
✓	1987			
✓	250122			
✓	250122			
✓	6543551			
✓	6543551			

Transfer Cancel

For any lots updated by this function; details of the change will be displayed in the Change Log accessible from *View History* in the roll. **Log Viewer** will also detail the changes as per below.

Search Logs

Refresh Export Advanced

Field Condition Value

Date/Time is on or after Specific Dates Today

Category is equal to

Username is equal to

269 records displayed

Date/Time	Log Level	Username	Description	Building	Category
21/03/2022 1:39:27 PM	Info	craig.jeffcoat	For Lot 02100004 changed agent from #Gold Coast Holiday Rentals to ABC Property Specialists (portfolio transfer)	6543551	ROLLED.LOG
21/03/2022 1:39:26 PM	Info	craig.jeffcoat	For Lot 02100017 changed agent from #Gold Coast Holiday Rentals to ABC Property Specialists (portfolio transfer)	6543551	ROLLED.LOG