Guide for Principals and Owners on Assigning Bonds to Property Managers

Step 1: Respective agency's principle/owner needs to login to the **RBO Biz** portal via using the following link.

https://portal.cbs.sa.gov.au/biz/s/login/

Step 2: Once logged in, the agency owner will be able to see the following home page.

Step 3: Click on the "Bonds" dropdown menu to reveal associated options and then click on "All Bonds" option.

Step 4: Navigate to the "All Bonds" page where you will find the "Update Agent" button located on the right side of the screen. Click on the "Update Agent" button to proceed.

Step 5: A popup will appear presenting you with two options for bulk assigning/transferring Bonds to agents within your agency. Click on your preferred option to proceed.

Step 6: If you have chosen to transfer bonds using the "Transfer By Agent Name", follow these steps:

1. Select the "Source Agent" and "Target Agent" fields. This will display a comprehensive list of all agents within your agency.
2. Choose the relevant agent names from the list:

    -   "Source Agent" should be the current agent managing the bonds.
    -   "Target Agent" will be the future agent to whom you intend to assign the management responsibility.

3. Click the "Submit" button to complete the bulk assignment process.

Step 7: If you have chosen to transfer bonds using the "Transfer By Bond Number" option, follow these steps:

- Enter the bond number(s) separated by commas (,) in the designated "Enter Bond Number" field.
- Specify the new agent's name in the "Target Agent" field to assign all selected bonds to the new agent.
- Click the "Submit" button to complete the bulk assignment process.

After the agency's principal/owner follows the steps outlined above, the assigned agent will be able to log in and access the bonds associated with them.