

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.

The screenshot shows the RBO Biz portal home page. The header includes the Government of South Australia logo, 'RBO BIZ', and a user profile for 'John Doe'. The main navigation bar has 'Agency', 'Bonds', and 'Register' dropdowns, and a 'Logged in: JD Pty. Ltd. (Principal ...)' indicator. The 'All Bonds' section displays a table with one bond entry: Bond Number 1111111, Property Address Unit 1 1 Main Street Doewood 1111 SA Australia, Agreement Type Residential Tenancy, Created Date 13/06/2024, and Status Unclaimed. The 'Approval Requests' section has a dropdown menu set to 'Bond Approval Requests' and an empty table. On the right, there are 'Quick Links' (Consumer Portal) and 'Need Support' (General Enquiry, Phone Number 131 882, Mailing Address GPO Box 965 Adelaide SA 5001) sections.

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

This screenshot is identical to the previous one but with the 'Bonds' dropdown menu open. The menu options are 'All Bonds', 'Refund Request', 'Import Bond', and 'Substantiation Claims'. Two orange callout boxes with arrows point to the 'Bonds' dropdown and the 'All Bonds' option. The first callout says 'Click on "Bonds" Dropdown to reveal associated options.' and the second says '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.

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John Doe

Agency Bonds Register

Logged in: JD Pty. Ltd. (Principal ...)

Bonds

All Bonds

Bond Number ↑	Property Address	Agreement Type	Created Date	Status
1 1111111	Unit 1 1 Main Street Doewood 1111 SA Australia	Residential Tenancy	13/6/2024	Unclaimed
2 2222222	Unit 2 1 Main Street Doewood 1111 SA Australia	Residential Tenancy	26/3/2021	Lodged
3 3333333	Unit 3 1 Main Street Doewood 1111 SA Australia	Residential Tenancy	6/4/2021	Lodged
4 4444444	Unit 1 1 Main Street Doewood 1111 SA Australia	Residential Tenancy	20/4/2021	Lodged

Update Agent

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.

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John Doe

Agency Bonds Register

Logged in: JD Pty. Ltd. (Principal ...)

Bonds

All Bonds

Bond Number ↑	Property Address	Agreement Type	Created Date	Status
1 1111111	Unit 1 1 Main Street Doewood 1111 SA Australia	Residential Tenancy	20/4/2021	Lodged

Update Agent

-- Clear --

Transfer By Agent Name

Transfer By Bond Number

Cancel Submit

You will be presented with these 2 options to bulk assign the bonds to a different agent at your agency. Select either of the options by clicking on it.

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.

The screenshot shows the RBO BIZ interface with a modal window titled "Update Agent". The modal contains the following fields and options:

- Operation Type:** A dropdown menu with "Transfer By Agent Name" selected.
- Source Agent:** A dropdown menu with "John Doe" selected.
- Target Agent:** A dropdown menu with "Mary J" selected.

At the bottom of the modal, there are two buttons: "Cancel" and "Submit".

The background interface shows the "Bonds" section with a table of bond numbers:

Bond Number ↑
1 1111111
2 2222222
3 3333333
4 4444444

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.

The screenshot shows the 'Update Agent' modal form in the RBO BIZ system. The form is titled 'Update Agent' and includes a close button (X) in the top right corner. Below the title, it states 'Asterisk (*) indicates required field'. The form contains three main fields: 'Operation Type' (a dropdown menu set to 'Transfer By Bond Number'), 'Enter Bond Number' (a text input field containing '1111111,2222222,3333333'), and 'Target Agent' (a dropdown menu set to 'Mary J'). There are 'Cancel' and 'Submit' buttons at the bottom of the modal. In the background, a table of bonds is visible with columns for 'Bond Number' and a list of numbers: 1111111, 2222222, 3333333, and 4444444.

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.