Add a new contact to an application





1

Background

A new application contact, can be added by both applicant and/or assessing relevant authority, during or after:

- The assessment for planning, land division or building consent, or
- The granting of development approval, or
- The submitting of a required building notification.

The types of contacts that can be added are:

- Applicant
- Land Owner
- Builder
- Building Certifier
- Building Owner
- Owner's Agent
- Registered Building Work Supervisor

Reusable and default application contacts

During the following stages of application submission, building consent assessment and during building/building work construction an option to "Add from your application contacts" is available for volume applicants and accredited professionals to select an application contact, or the contact will automatically default.

- Application submission application contacts, includes applicants, primary contact, invoice contact and adding a builder, and
- Updating contacts from the development application contacts, and
- · Providing building indemnity insurance details, and
- Submitting building notifications.

To learn more, visit how to set-up reusable and default application contacts | PlanSA.

New contacts for building notifications

When adding a new contact on behalf of an individual, who does not have the required access to add themselves or their business as a contact to a building notification, once added as an application contact, their contact record is available for selection from the field drop-down, as seen in the image below.



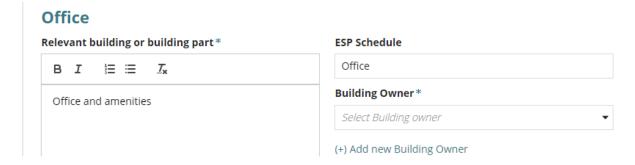






New building owner contact for Essential Safety Provisions

During the completion of the Building Consents - Essential Safety Provisions (ESPs) – the addition of new building owner by the assessing authority will create an application contact and automatically add to the Applications Contacts.



Confirmation added as an application contact

When a new contact is added they receive an email advising their addition as an application contact, along with the 'primary contact' for the application.



Included instructions

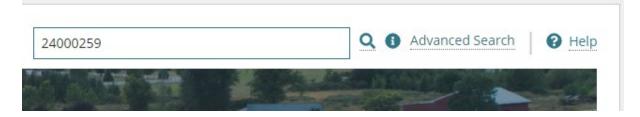
- Locate the application contacts
- Add an individual or business contact
- Add a contact from your application contacts
- Add a Crown Agency Contact





Locate the application contacts

1. Search for the development application using the **ID** number.



Tip for assessing authorities: Remove the **Assigned to me only** checkbox to view all applications.

2. Click on the **ID** of the application to view more details.

1 results for: "24000259"



3. The development application – summary screen shows.

Development application - 24000259:



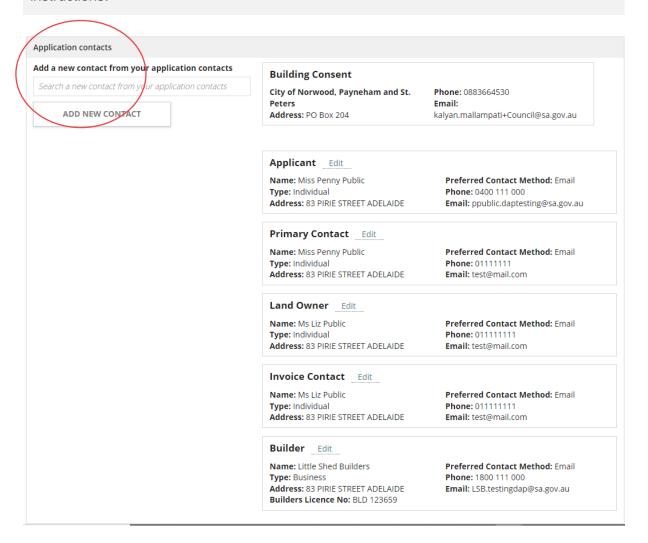




4. Scroll down the page, until the **applicant contacts** are visible.

Add a new contact from your application contacts

This feature is only available to volume applicants (e.g. builders, surveyors) and accredited professionals and will remain hidden until the application contacts have been set-up following the how to set-up reusable and default application contacts | PlanSA instructions.

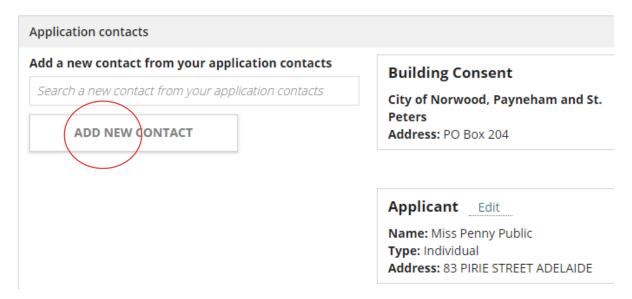






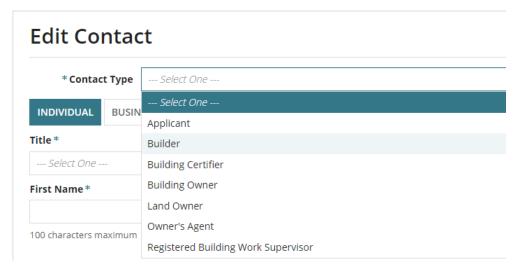
Add an individual or business contact

5. Click on ADD NEW CONTACT.

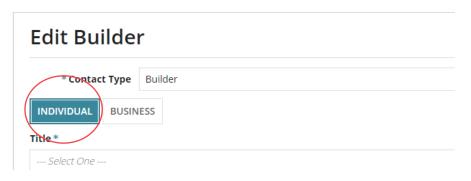


The Edit Contact screen displays.

6. Select the Contact Type from the drop-down list, e.g. Builder



7. Leave the default contact type INDIVIDUAL or change to BUSINESS.



Add a new contact to an application



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and Investment

- 8. Complete the individual or business contact information.
 - Contact Name*: Title First Name Last Name
 - **Business Name*:**
 - Main Contact Name: When adding a business contact, option to add first name or full name of the organisations main contact for enquiries related to invoice payments, for example.
 - Licence Number*: Is shown when the new contact is a builder, building certifier, owner's agent or registered building work supervisor.

INDIVIDUAL

BUSINESS

Business Name*

John's Pergolas and Retaining Walls

100 characters maximum

Main Contact Name

John Johnes

100 characters maximum

Licence Number *

BLD 15645

50 characters maximum

- 9. Complete the postal address
- Start typing the address and then select the matching address.

Postal Address

Postal Address

83 piri

83 PIRIE STREET, ADELAIDE

Search for address

Add a new contact to an application





Manually enter a postal address

If the 'no results found' or a matching address has not shown, then select **Enter the address manually**.

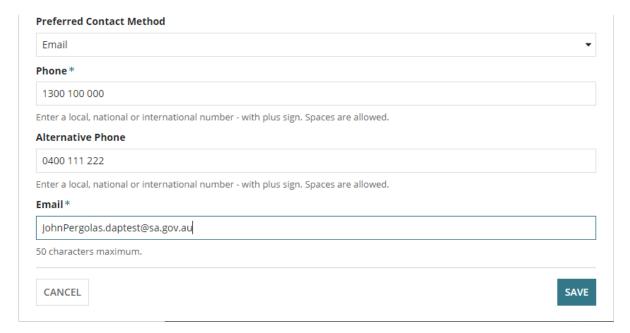
Postal Address *
Type an address to search ①
Enter the address manually
Preferred Contact Method
Email
The enter the Country, Street Address, City, State and Post Code.
Country*
Australia
Street Address*
83 PIRIE STREET
500 characters maximum
City*
ADELAIDE
50 characters maximum
State*
South Australia
Postcode *
5000
Must be 4 digits

Add a new contact to an application

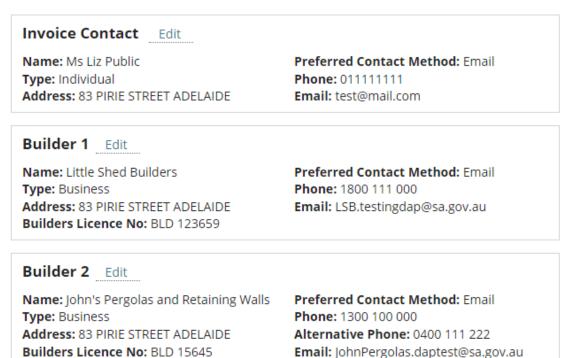




- Preferred contact method: leave 'email' default or change to 'post'.
- Phone* accepts 1800 or 1300 numbers, mobile numbers or landline numbers.
- Alternative phone* is optional. Leave blank if no alternative phone number.
- Email*
- 10. Click on **Save** to keep the changes.



The contact is added the to the **Application Contacts** and when more than one of the same contact type a number is added (refer to image below).







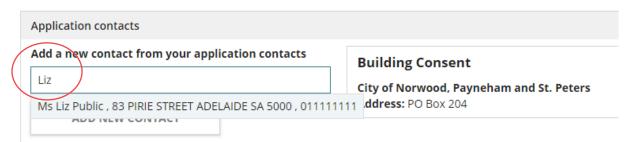
Add a contact from your application contacts

Add a new contact from your application contacts

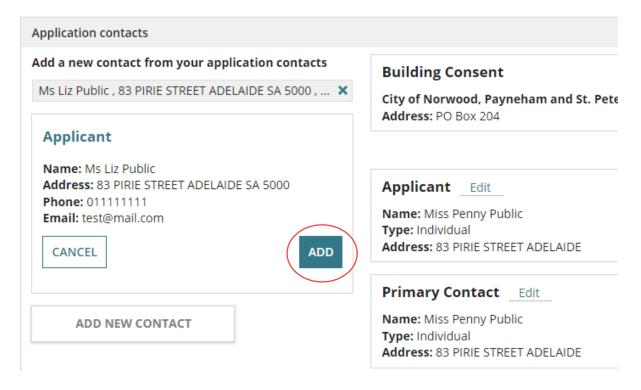
Is only available to volume applicants (e.g. builders, surveyors) and accredited professionals. To learn more, visit https://example.com/how-to-set-up-reusable-and-default-application-contacts|PlanSA.

Note, the searchable contact types exclude invoice contacts and primary contacts.

1. Start typing the contact's name to show a list of contacts containing those letters.



- 2. Click on the contact's name to select.
- 3. The contact type and contact details are displayed. Click CANCEL to perform another search or ADD the contact.



Version 1.1

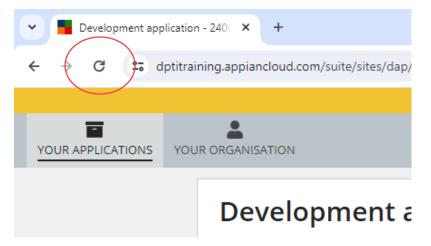
How to...

Add a new contact to an application

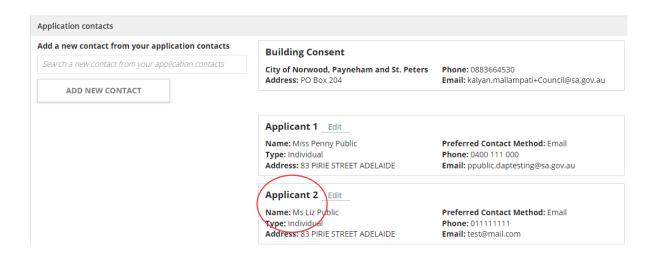


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4. Refreshing the browser maybe required, to show the added contact.



The contact displays in the application contacts.





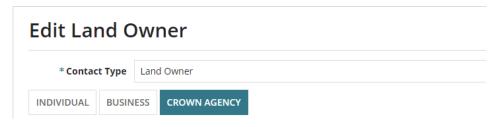
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Add a Crown Agency Contact

The **Crown Agency** contact is only available for contact types 'Applicant' and 'Land Owner'.

- 1. Select the Contact Type from the drop-down list, e.g. Land Owner.
- 2. Select the contact type CROWN AGENCY.



3. Complete the business contact information.

Crown Agency*

Postal Address

Start typing the address and then select the matching address.

If the 'no results found' or a matching address has not shown, then complete Manually enter the postal address instructions.



Preferred contact method: leave 'email' default or change to 'post'.

Phone*

Alternative phone: is optional. Leave blank if no alternative phone number.

Email*

4. Click on **Save** to keep the changes.

