

## Assigning Agents / Managers to Artists

These instructions cover the basics of creating and assigning managers and personal representatives to the soloists, conductors and ensembles in OPAS. If further information or instructions on setting Background Data are required, please contact OPAS technical support.

Create the Agency (where necessary) In the OPAS **Address Book (General)** create the artist management companies that represent the artists you engage<sup>1</sup>. It is a good idea to create and use an **Address Group** called "Artist Manager" (or something similar)<sup>2</sup>.

Remember that these **Address Book** entries are for the agencies or *companies*, not individual agents or people. Each agency need be created only one time, and thereafter can be linked to as many artists as required.

FILTER: Address-Book (General) 1 [Askonas Holt Ltd , London]

Co. / Last Name: Askonas Holt Ltd First Name: [ ]

Code: [ ]

Contact Numbers [2]

Order Number	Number	Is
1	020 7400 1700	
2	www.askonasholt.co.uk	

Address Groups [1]

Group	Code	Text	Date 1
Artist Manager	MGR		

Staff [3]

Order	Title	First Name	Last Name	Position	Mail Merge	Phone	Fax	E-Mail	Mobile	Linked Address
1	Ms.	Celia	Willis	Director	<input checked="" type="checkbox"/>	020 7400 1759		celia@askonas		
2	Mr.	Mark	Hildrew	Executive Director	<input checked="" type="checkbox"/>	+44 20 7400 1730		mark.hildrew@		
3	Ms.	Alexandra	Schulz	Artist Manager - Asst. to	<input type="checkbox"/>	020 7400 1742				

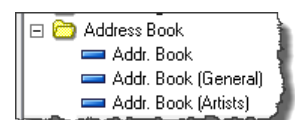
Address 1: Lonsdale Chambers City: London c/o Name: [ ]

Address 2: 27 Chancery Lane State: [ ] ZIP: WC2A 1PF Country: United Kingdom

Individual agents and other employees of the agency are listed in the **Staff** grid for the agency. As many employees of the company as you like can be listed here, and each person listed can have his/her personal phone/fax/email/mobile phone contact information. Note that the email link is active in this grid, so you can launch your email program and send an email directly to anyone in this grid.

If the artist management firm is a single-person company, the Staff grid may contain the single agent at that firm.


1. Depending upon how your installation of OPAS is set up, you may have several different address book configurations. When creating artist manager companies use **Address Book (General)** or **Address Book**. The screen pictures in this guide use **Address Book (General)**.

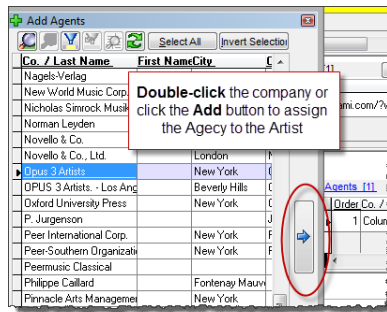
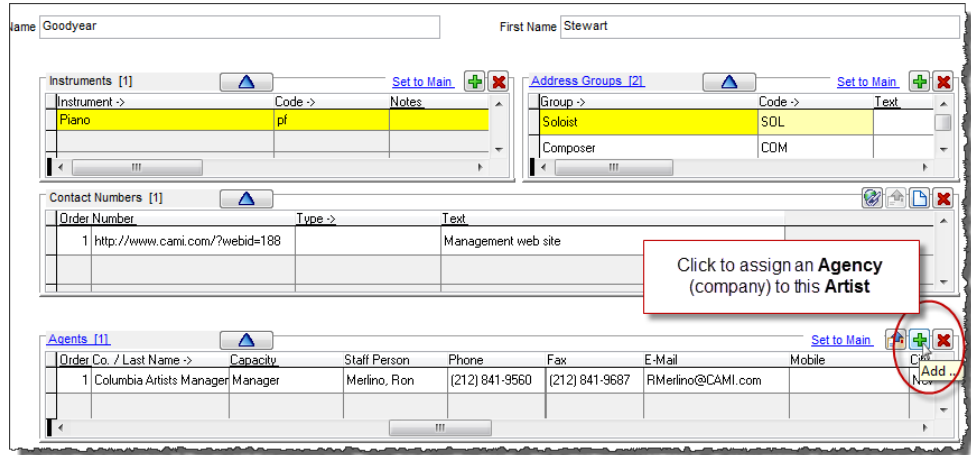


2. If you should need to create this Address Group, select **Address Groups** from the alphabetical list of Program Areas. Make sure the **System** Group for Artist Managers is "Agency".

Assign the Agency to Artists

Link as many agencies as are required to any soloist, conductor or ensemble entry in the **Address Book (Artists)** <sup>1</sup>.

First link the artist management company by clicking the Add New icon  at the top right of the **Agents** grid.



OPAS will display a list of all companies from the **Address Book** that are classified as agents – the list will likely include publishing or other agencies as well.

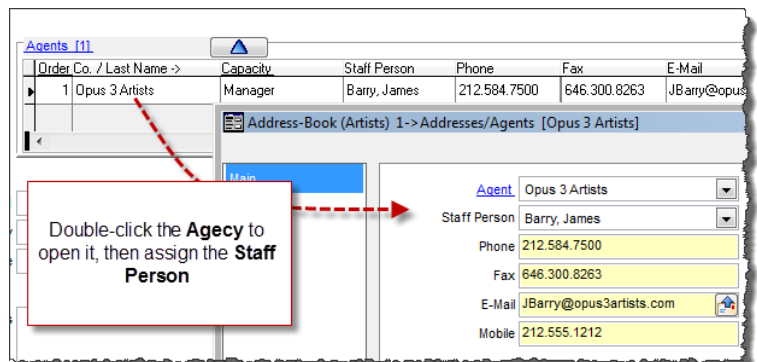
Double-click the name of the company **or** select it and press the Enter key on your keyboard **or** click the large **Add** button to assign that company to the artist.

Specify the individual agent

Once the company has been linked, specify the *person* at that company that has specific responsibility for the artist. Double-click the company entry to modify it (shown below).

At the window that pops up, select the individual(s) at the agency associated with the artist from the **Staff Person** drop-down. When you select an individual, his/her contact information (taken from the Address Book in the first step of this guide) is automatically transferred. This process can be repeated as many times as is necessary to reflect the different people at the company who work for this soloist or conductor.

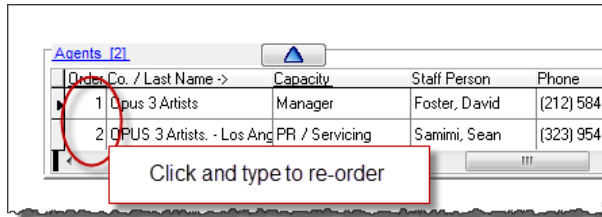
This data structure allows any number of people at the same agency to work for the same artist (there may be a manager, a booking agent and a servicing agent). It also allows multiple agencies to be assigned to the same artist (a manager, a publicist, a travel agency, etc.).



Notes Email links are also active in the Agents grid. Select an agent and click the email button to launch your email program.



Agencies and individuals in the grid can be put in any order. When printing contracts and other documents, OPAS will use the **first agent** as the artist's main contact



You can "circle back" to the agency's **company** record from within the Soloist or Conductor's **Address Book** entry. **Right-click** the mouse on the agency name and then click the **Agents...** link:

