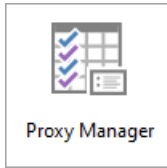


Proxy Manager

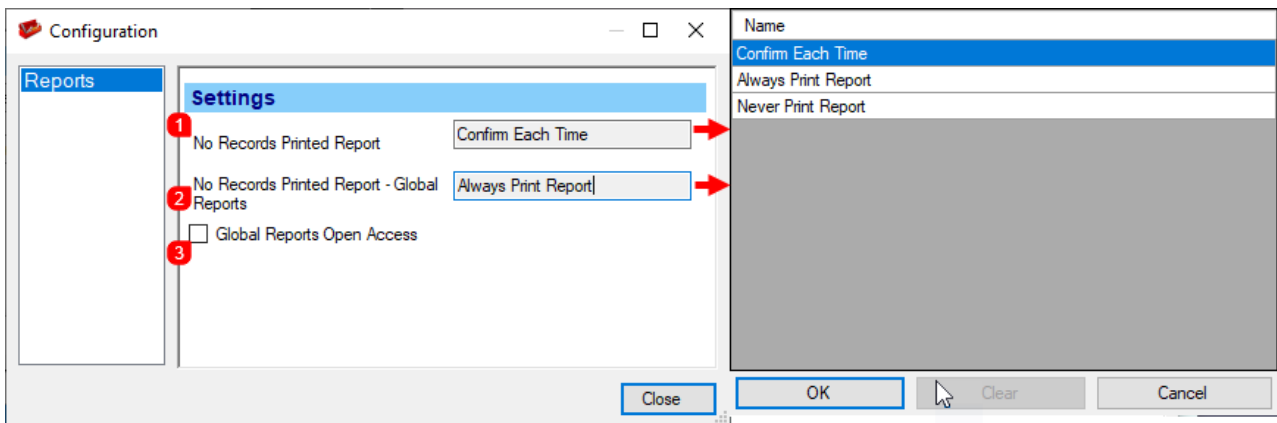
Last Modified on 18/12/2023 5:02 pm AEST



The instructions in this article relate to **Proxy Manager**. The icon may be located on your **StrataMax Desktop** or found using the **StrataMax Search**.

This menu is for setting up a list of Proxy Holders prior to the preparation of an **Attendance & Voting Register**. Permanent proxies noted in the **Roll** will be preset. The proxy list may be amended prior to a meeting if required.

Proxy Manager Configuration



1. No Records Printed Report

If a report produces no records, choose what happens:

- Confirm Each Time
- Always Print Report
- Never Print Report

2. No Records Printed Report - Global Report

If a report produces no records, choose what happens:

- Confirm Each Time
- Always Print Report
- Never Print Report

3. Global Reports Open Access

If ticked, the the global report process will not check locked buildings.

Enter or Edit a Proxy for a Lot

If a Proxy is entered into **Proxy Manager** this will be reported instead of Nominee or Representatives in the **Roll**.

1. Search or select **Proxy Manager**.
2. Click the *Proxy Editor* option, and then click *Proceed*.
3. Select the lot account to edit a proxy for, and click *Edit*.
4. Click on one of the following options to select it:
 - No Clearance - None of the previous proxies will be deleted.
 - Clear Non-Permanent - Only the previous non-permanent proxies will be deleted.
 - Clear Expired Proxies - Only expired proxies will be deleted.
 - Clear All Proxies - All proxy records, permanent and non-permanent will be deleted.
5. The list of lot accounts for this building will be displayed in Lot Account order > select the lot account to enter a proxy for and click *Edit*.
6. Type in the *Proxy Name*.
7. Type in the *Date Appointed*.
8. Type in the *Expiry Date* for this proxy if they are non-permanent.
9. Type a Y for yes or a N for no in *Permanent*.
10. Add any *Conditions*.
11. Click on *OK*.

02100013 14 M SPICER

Proxy Holder Name: Mr Proxy Example

Date Appointed: 01/05/20

Expiry Date: 31/12/20

Permanent: Y

Conditions: Only at EGMs

OK Cancel

Entry Assistant
Enter any characters (30) Switch Overwrite

Delete a Proxy for a Lot

1. Search or select **Proxy Manager**.
2. Click the *Proxy Editor* option, and then click *Proceed*.
3. Select the lot account to delete a proxy for.
4. Click *Delete* (Deletes the proxy information, but not the record).
5. Click on *Close*.

Select Proxy Record

Proxy Editor STRATAMAX ONLINE HELP 11

Account No	Lot No	Owner	Proxy	Permanent Flag	Appointed	Expiry
02100005	5	DEAD POOL				
02100006	6	LARRY TERRACE				
02100007	7	FRY STEPHEN				
02100008	8	SPARK H				
02100009	9	I CIVITELL				
02100010	10	T A S COLLINS				
02100011	12	K Sullivan				
02100012	13	L CHAN				
02100013	14	M SPICER	Mr Proxy Example	Y	01/05/20	31/12/20
02100014	15	N BARNDON				
02100015	16	HARVEY MEYER				
02100016	17	P MCCORMICK				
02100017	18	GALLAWAY Q				
02100018	19	R BRERETON				
02100019	20	JOHN BLANEY				
02100020	21	T A S COLLINS				
02100021	22	U SMITH				
02100022	23	V SHISHKINA				

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Delete Edit Close

Print the Proxy Report

These instructions include previewing the report before printing it.

1. Search or select **Proxy Manager**.
2. In the options section click on *Proxy/Nominee Report* so that it is marked.
3. If you wish to preview the report before printing it, click on *Preview Report* so that it is marked.
4. Click on *Proceed*.

Proxy Manager STRATAMAX ONLINE HELP... X

Help

This program is for reporting of Proxy Holders to assist in meeting management. The Proxy List may be amended prior to a meeting using Proxy Edit.

Proxy/Nominee Report
 Preview Report
 Proxy Editor

Proceed

Close

5. Click on the report sort order to use. The list will be printed in order of the selected field:
 - o Account Number.
 - o Lot Number.
 - o Owner.
 - o Proxy Holder.

To set this sort order as the default for all buildings, click on *Set as default* so that it is marked.

6. Click on *OK*.
7. Tag all or a selection of lots to be printed in this report, and click *OK*.
8. If you chose to preview the report first then it will be displayed.

9. If presented with the Report Setup print options set the options as you require, then click on *OK* to print/
produce the report.
