Proxy Manager

Last Modified on 14/11/2024 9:31 am 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 screen 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.

Note that the lower half of this article contains sections with '[Old]' in their title, indicating that the information in that section applies to StrataMax version 5.6.118 and below only. All other section in the top half apply to *StrataMax version 5.6.119* and above.

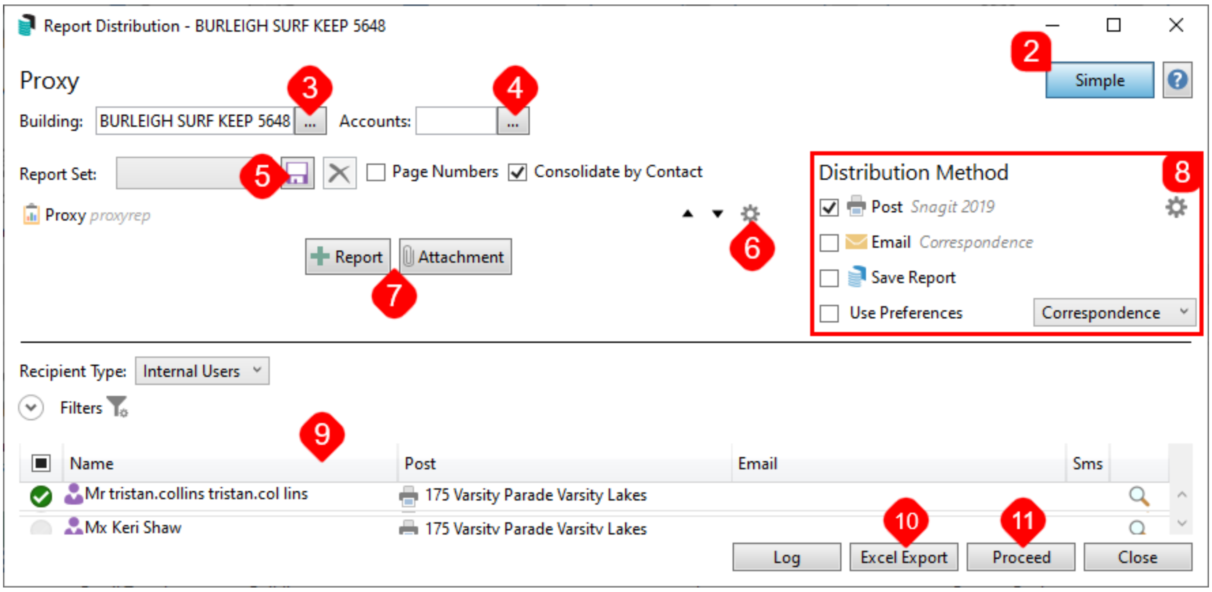
Proxy Manager | Producing a Report

The Proxy Manager uses the ***Report Distribution*** screen (as of *StrataMax version 5.6.119*). For more information about all of its buttons, options, features, and functions, see the *Report Distribution article.* This section serves as a quick reference guide on how to produce the proxy report, along with any requirements and limitations it has.

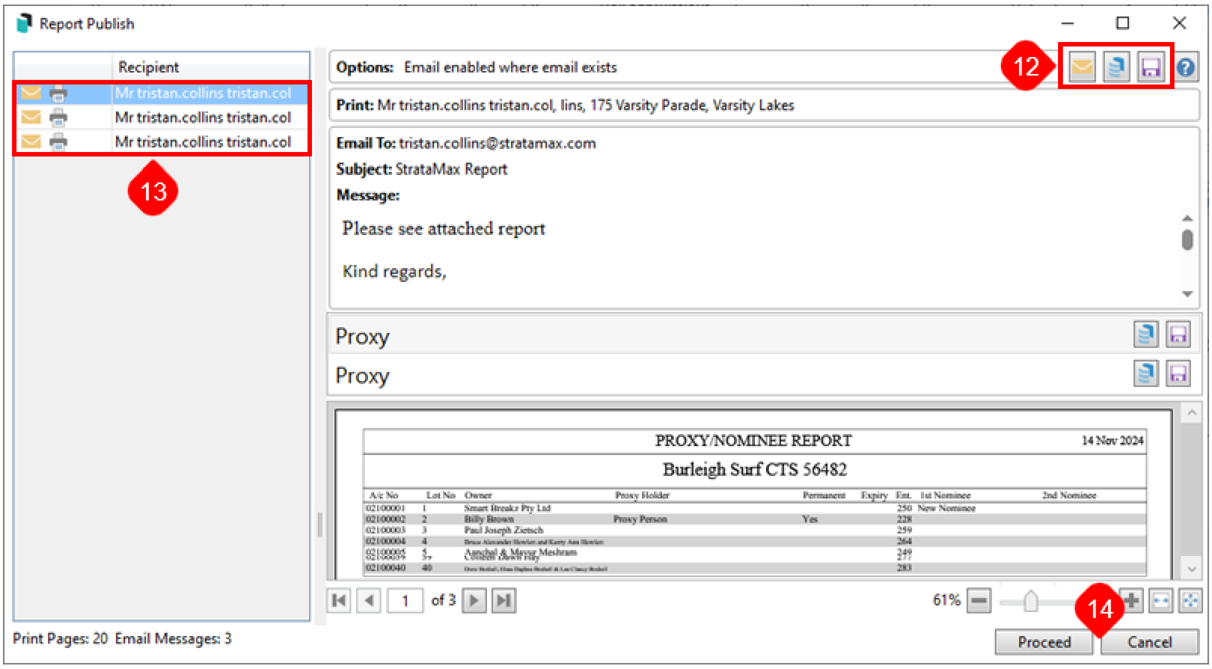
In order for a proxy to appear on this report, it must first be added to lots in the ***Roll***. Please see *how to add other contact types to a lot for more info.*

1. Search or select ***Proxy Manager.***
2. Click the *Advanced* button in the top right to display more options, buttons, tick boxes, the recipient list, etc.
    - The button name will change to 'Simple', which can be clicked to hide all the options, buttons, tick boxes, the recipient list, etc
3. If you would like to run the report for multiple buildings, click the ellipsis button next to the *Building* field in the top left. Then choose (tag) the required buildings, and click OK.
4. If you would like to limit the report to display specific accounts, then click the ellipsis button next to the *Accounts* field in the top left. Then choose (tag) the required accounts, and click OK.
5. Use the 'Report Set' *Save* button if you have added additional *Reports* or *Attachments* and you would like to save these as a report set to be used again in the future.

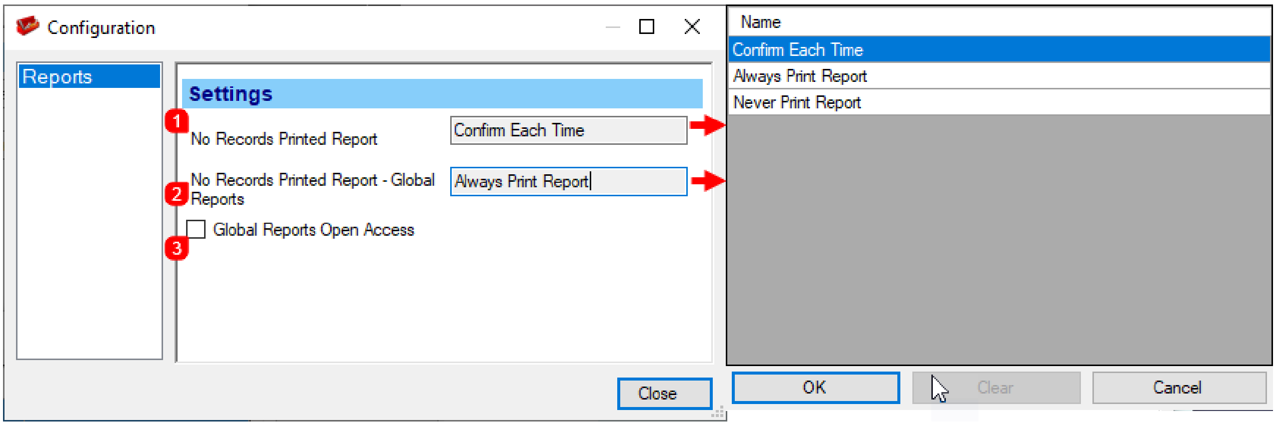
6. To configure the report, click the cogwheel next to the report/template name.
    - *Report Order* changes the order of the data in the report in alphanumeric order.
    - *Include Lots with no proxy* can be ticked to include lots in the report even if no proxy is present in that lot.
    - *Template* is a drop-down to select a different template for the report, but currently there is only one template.
7. An additional *Report* or *Attachment* can be added by clicking the relevant buttons.
8. Choose the *Distribution Method: Post, Email, Save Report, Use Preferences,* and configure each by clicking their respective cogwheels.
    - In the 'Report Publish' screen there are additional options to e-mail the report, save it DocMax, or save it to a Windows folder.
9. By default *Internal Users* is the default *Recipient Type,* and the current user is selected to receive the report. But the *Recipient Type* can be changed, and more recipients can be selected in the list to receive the report as well.
10. Click the *Excel Report* button to export the report to an Excel sheet.
11. Click *Proceed* to display the 'Report Publish' screen where the report can be reviewed before being sent/printed/saved.



12. In the 'Report Publish' screen, use the relevant buttons to e-mail the report, save it DocMax, or save it to a Windows folder.
13. If the report is being run for multiple buildings, click through the recipient/s on the left side to view the report for each building.
14. If you would like to e-mail/send to multiple recipients, click *Proceed.* Or click *Cancel* to close the 'Report Publish' screen and go back to make any required changes.



Proxy Manager Configuration [Old]



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

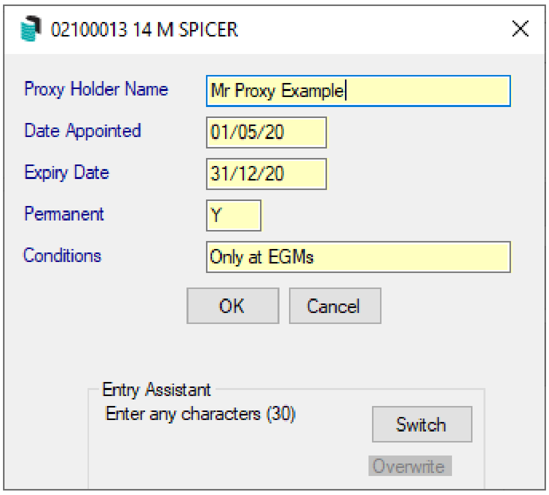
3. Global Reports Open Access

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

Enter or Edit a Proxy for a Lot [Old]

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

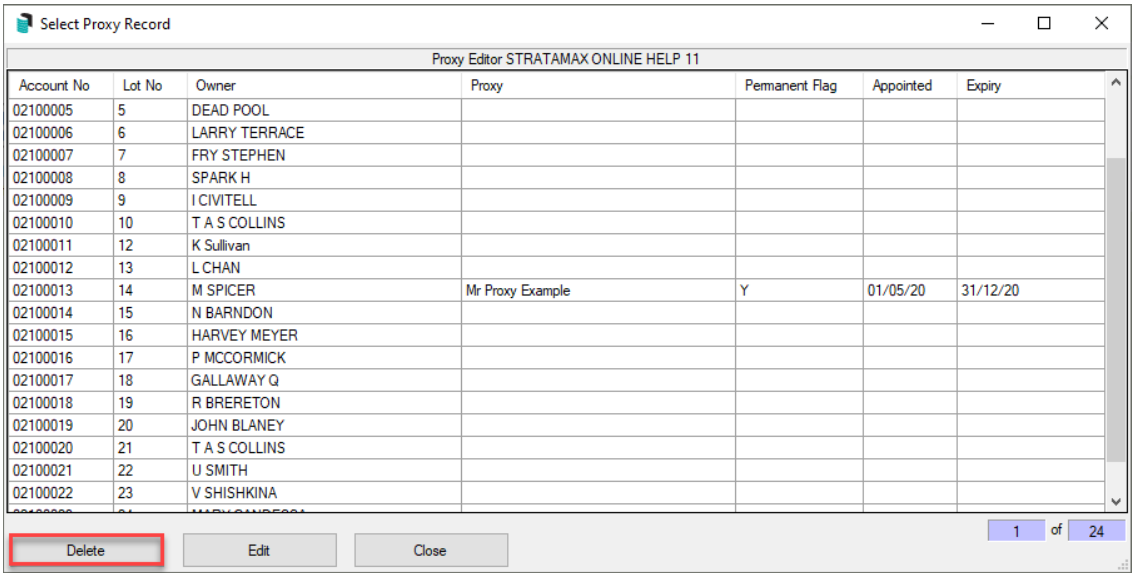
1. Search or select ***Proxy Manager.***
2. Click the *Proxy Editor* option, and then click *Proceed.*
3. Select the lot account to edit a proxy for, and click *Edit*.
4. Click on one of the following options to select it:
    - No Clearance - None of the previous proxies will be deleted.
    - Clear 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*.



Delete a Proxy for a Lot [Old]

1. Search or select ***Proxy Manager.***
2. Click the *Proxy Editor* option, and then click *Proceed.*

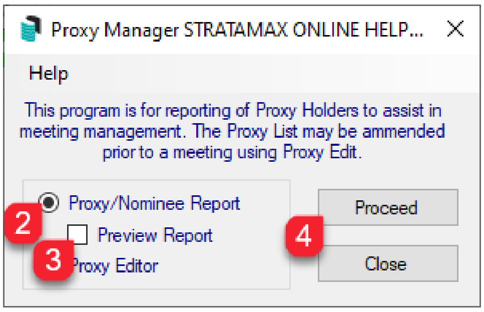
3. Select the lot account to delete a proxy for.
4. Click *Delete* (Deletes the proxy information, but not the record).
5. Click on *Close*.



Print the Proxy Report [Old]

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*.



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