Proxy Manager

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
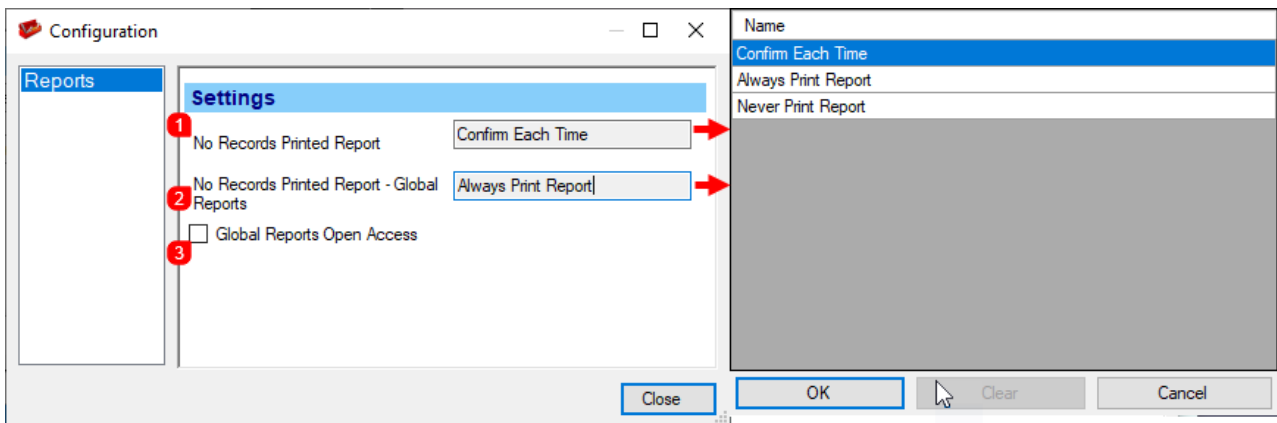
1. No Records Printed Report
If a report produces no records, choose what happens:

- 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*.

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*.

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*.

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.