

# Owners and Debtor Reports

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Owner and Debtor reporting can be completed on either a global or local basis. Review this article for some simple global options available.

## AGM Window/ Noms Close (1980)

This report is based on the BUGTA Act 1980 and uses the State, Type and Module to determine if the property falls under this Act. Enter the 1st AGM Date in **Building Information** to report the required dates under this Act for when Nominations should close, AGM Agendas and the next Annual General Meeting Dates.

1. Search or select **Reports / Utilities (Global)**.
2. Click **Select Buildings** and tag required buildings (Ctrl + A to tag all) / *OK*.
3. Select *Group*
4. Click **AGM Window/ Noms Clos' (1980)** / *OK* / *Proceed*.
5. Assign a Sort Preference selection if desired / *OK*.

Example of AGM Window/ Noms Close (1980):

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Building Name	Type	Number	1st A.G.M. Anniv	AGM Finish	Notice Date	Nominations Close	Account Manager
STRATAMAX ONLINE HELP	B.F.P.	11	15/01/20	15/03/20	04/12/19	25/12/19	StrataMax Training

## AGM Window / Noms Close (1997)

This report is based on the Body Corporate and Community Management Act 1997 and will report on the required dates under this Act for when Nominations should close, AGM Agendas and the next Annual General Meeting Dates.

1. Search or select **Reports / Utilities (Global)**.
2. Click **Select Buildings** and tag required buildings (Ctrl + A to tag all) / *OK*.
3. Select *Group*
4. Click **AGM Window/ Noms Close (1997)** / *OK* / *Proceed*.
5. Assign a Sort Preference selection if desired / *OK*.

Example of AGM Window / Noms Close (1997)

Building Name	Type	Number	Financial Year End	AGM Finish	Notice Date	Nominations Close	Account Manager
STRATAMAX ONLINE HELP	B.F.P.	11	31/12/19	31/03/20	19/11/19	31/12/19	StrataMax Training

## Owner Balances Report

Owner Balances Report is to report only on Owner Balances for the tagged properties.

1. Search or select **Reports / Utilities (Global)**.
2. Click *Select Buildings* and tag required buildings (Ctrl + A to tag all) / *OK*.
3. Select *Group* / select *Owner Balances Report* / *OK* / *Proceed*.
4. Assign a Sort Preference selection if desired / *OK*.
5. Select the arrears period required i.e. Current, 30,60,90, Over 90 Days.

## Owner Balances Report - Aged

The *Owners Balances Report – Aged* will report on the Owners Balances aging for the selected time frame. This is a global report available similar to local aged balance list and includes all tagged buildings.

1. Search or select **Reports / Utilities (Global)**.
2. Click *Select Buildings* and tag required buildings (Ctrl + A to tag all) / *OK*.
3. Select *Group* / select *Owners Balances Report – Aged* / *OK* / *Proceed*.
4. Assign a Sort Preference selection if desired / *OK*.
5. Select the arrears period required i.e. Current, 30,60,90, Over 90 Days

## Roll Changes Report

This report will detail all roll fields in which limits can be applied to all roll tabs ie Letting Agent, Mortgagee, Nominee, Representative, Power of Attorney, Lessee (State Specific) It will produce the original detail plus the updated information and what date this has been applied from.

1. Search or select **Reports / Utilities (Global)**.
2. Click *Select Buildings* and tag required buildings (Ctrl + A to tag all) / *OK*.
3. Select *Group* / *Roll Changes Report* / *OK* / *Proceed*.
4. When prompted 'Only one record from the second data file has been selected. Do you want to report each Building on one line?' – Select *No*.
5. Assign a *Sort Preference* selection if desired / *OK*.

**Note:** Limit Sections to tag only specific roll tabs of information for reporting. Receipt Date Start and Receipt Date Finish is based off the Date of Receipt of Notice field in the roll.