

Debtor (Second Debtor)

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The instructions in this article relate to **Debtor (Second Debtor)**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

This facility is designed to allow for billing outside of a standard levy process. Examples may include billing for storage spaces or common property rented to tenants or other entities. These debtors can have owner or non-owner records and provide them for various purposes. This type can also exist in a Sub-Group area to facilitate final utility billing.

Second Debtor Accounts are not included in any Levy Arrears processes as charges to Second Debtors are Invoices. Second Debtor Accounts can be included in the Arrears Manager to identify and report overdue accounts.

Add a New Second Debtor

Creating a Second Debtor is a contact that can be billed for anything that does include standard levies. Once the Debtor has been created, this can be used for **Invoice Entry (Second Debtor)** and **Invoice Printing (Second Debtor)**.

1. From either the Main or Sub-Group building search or select **Debtor (Second Debtor)**.
2. Click *Add New*.
3. Click *Create / Select Contact*.
4. Search for the contact using the search bar. If there is no contact available, click *Create Contact*.
5. Complete the field information, changing the type to select the correct record type.
 - Individual Type will contain information like this:

Contact Details

Name Surname first

Title Given Names Surname

Type

Reference Name

Address Title (1)

Address Title (2)

Letter Title

Australian Business Number

Postal Address

Residential/Business

Phone

Business

Email Address

All

Bank Account

BSB Branch Account Number

Website

Delivery Preferences

Correspondence Send by post Send by email

Levy Notice Send by post Send by email

Utility Bill Send by post Send by email

- The company will contain information like this.

Contact Details

Name: Company Information

Type: Company

Reference Name: Company Information

Address Title (1): Company Information

Address Title (2):

Letter Title: Company Information

Australian Business Number: 44535820077

Australian Company Number:

Postal Address

1 Postal Address Residential/Business

SUBURB QLD 4217

Phone

0747854555 Business

Email Address

companyinformation@gmail.com All

Bank Account

BSB	Branch	Account Number
184-446	Brisbane	987654321

Website

Delivery Preferences

Correspondence	<input type="checkbox"/> Send by post	<input checked="" type="checkbox"/> Send by email
Levy Notice	<input type="checkbox"/> Send by post	<input checked="" type="checkbox"/> Send by email
Utility Bill	<input type="checkbox"/> Send by post	<input checked="" type="checkbox"/> Send by email

Cancel Save

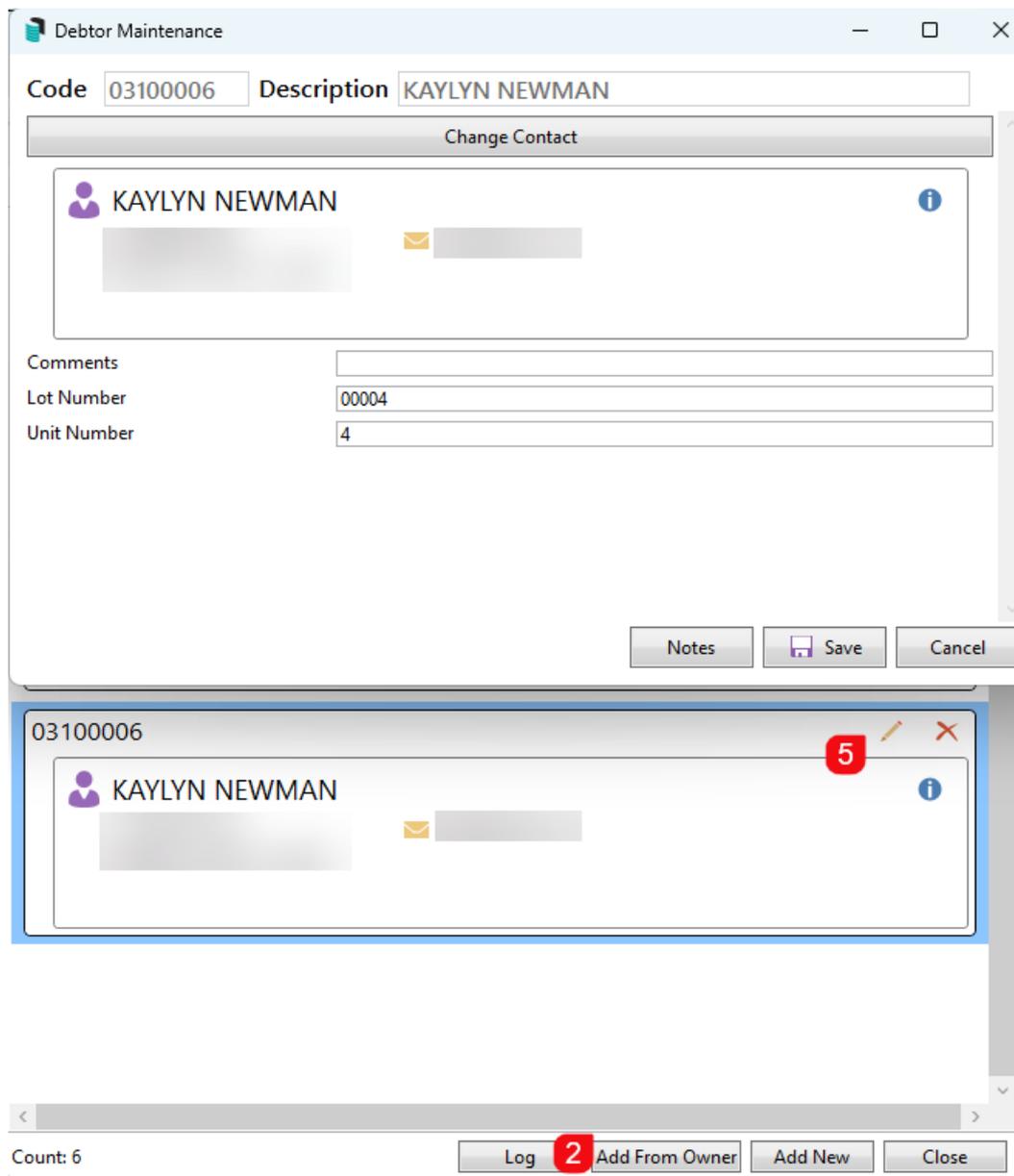
- If there is an email address, set the delivery preference for the contact and click Save.
- Additional fields from the **Debtor Maintenance** window, including Notes, will be available to complete where required. Click Save to finalise the Debtor Setup.

The screenshot shows a software window titled "Debtor Maintenance". At the top, there are two input fields: "Code" with the value "03100005" and "Description" with the value "Debtor Contact". Below these is a blue button labeled "Change Contact". The main content area features a contact card for "Debtor Contact" with a purple person icon, an information icon, and the following details: "175 Varisty Parade", "VARSITY LAKES QLD 4217", and an email address "debtor@gmail.com" with an envelope icon. Below the contact card are three input fields labeled "Comments", "Lot Number", and "Unit Number". At the bottom right, there are three buttons: "Notes", "Save" (with a floppy disk icon), and "Cancel".

Add Second Debtor | Add from Owner

Adding a second debtor from an Owner record will allow the contact information to be available in this area and simplify creating additional contacts using the same contact from the **Roll**. Adding the same contact to this area will mean any updates to the contact information will be in all locations where this contact is used.

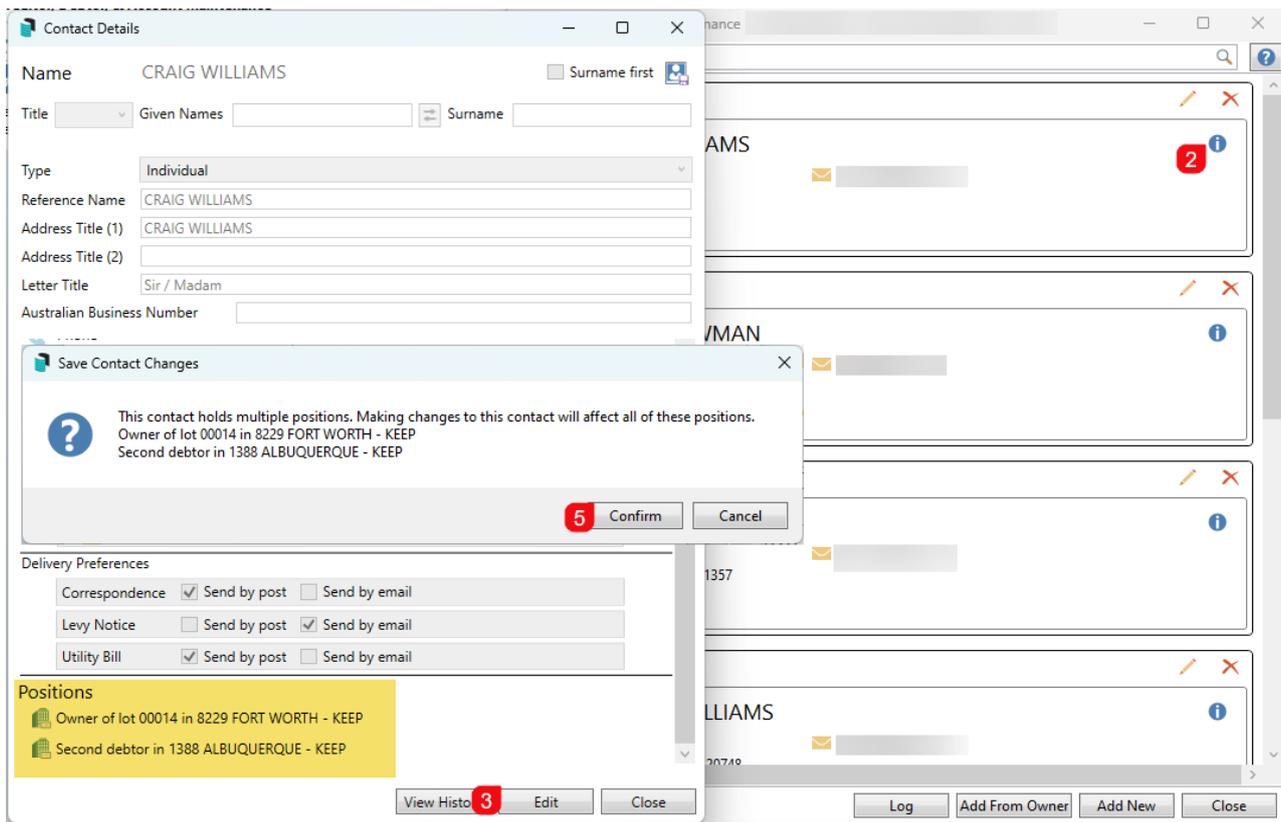
1. Search or select **Debtor (Second Debtor)**.
2. Click *Add From Owner*.
3. From the *Account Code List* of **Roll** records, select the contact required.
4. This will add the contact to the Secondary Debtor Maintenance area.
5. If the information needs to be reviewed, click the pencil icon to view the contact and field information. The Lot and Unit Number will be populated based on the **Roll** record.
6. Additional fields from the **Debtor Maintenance** window, including *Notes*, will be available to complete where required. Click *Save* if fields are adjusted to finalise the Debtor Setup.



Edit a Second Debtor

Editing a second debtor record will allow for the information to be updated for the contact. A critical understanding of having a contact card used here which may be used in other areas will mean that the edit of information will update in the areas that the contact is used. Refer to the positions of the contact to see where the record will update.

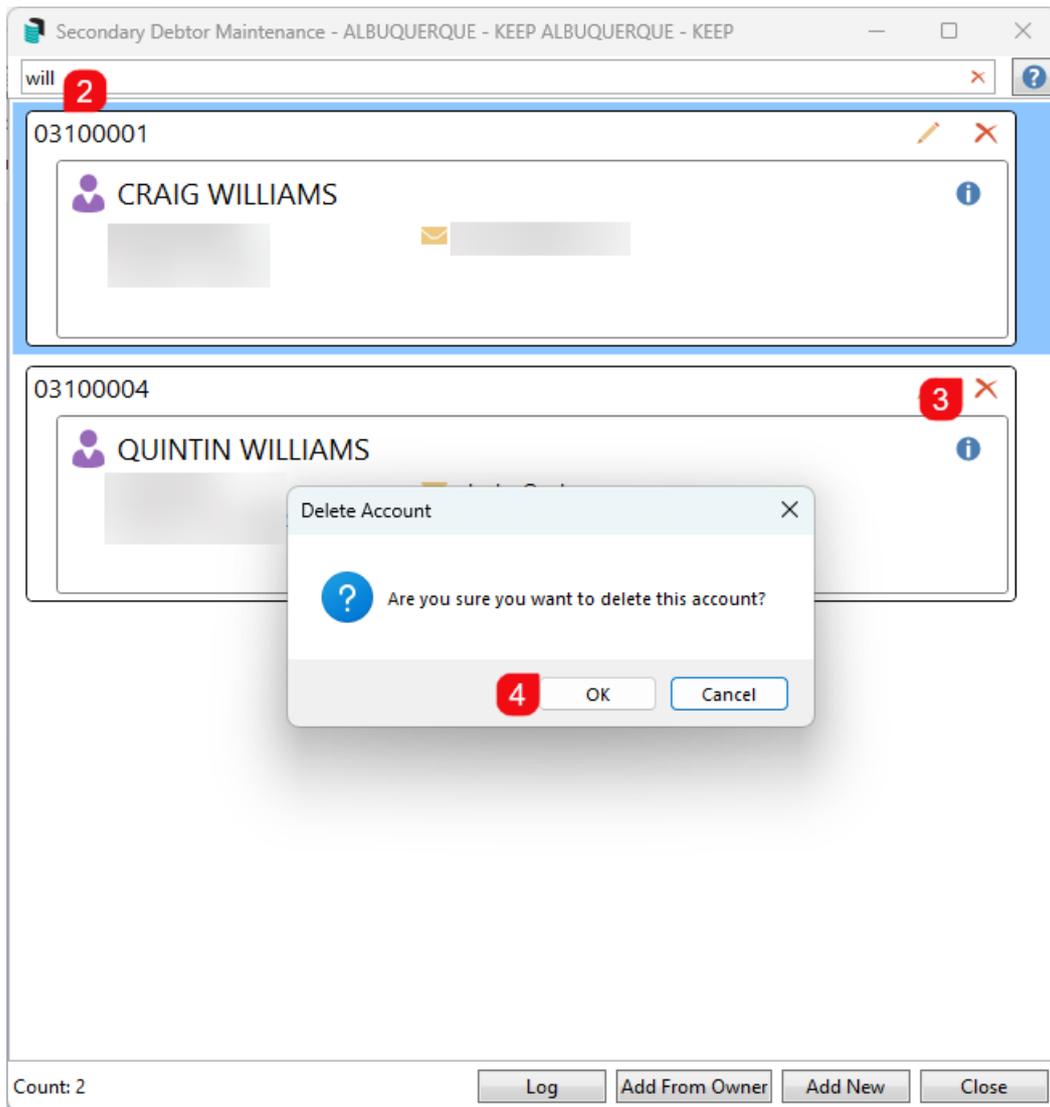
1. Search or select **Debtor (Second Debtor)**.
2. Click the blue i icon to confirm the positions of the contact.
3. Click the *Edit* button.
4. Update the information as needed and click *Save*.
5. When saving the contact there will be a confirmation message: This contact holds multiple positions. Making changes to this contact will affect all of these positions. Click *Confirm*.
6. Click *Close*.



Delete a Second Debtor

Removing a second debtor that has no transactions and is no longer required can be done using the *Delete* icon. This can be done from either the Main or Sub-Group area.

1. From either the Main or Sub-Group area.
2. Search or select **Debtor (Second Debtor)**.
3. Search for the contact using the search bar.
4. Select the record and click the *Delete* icon.
5. Click *OK* to message: *Are you sure you want to delete this account?*



Debtor (Second Debtor) Sub-Group

Second Debtors can be added to a Sub-Group type building and will facilitate issuing a final bill by taking the **Debtor Maintenance** record and converting this to a **Debtor (Second Debtor)** which will retain the same payment reference number. Click [here](#) for instructions on this process.