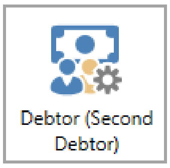
Debtor (Second Debtor)

Last Modified on 18/01/2024 9:11 am AEST



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*.

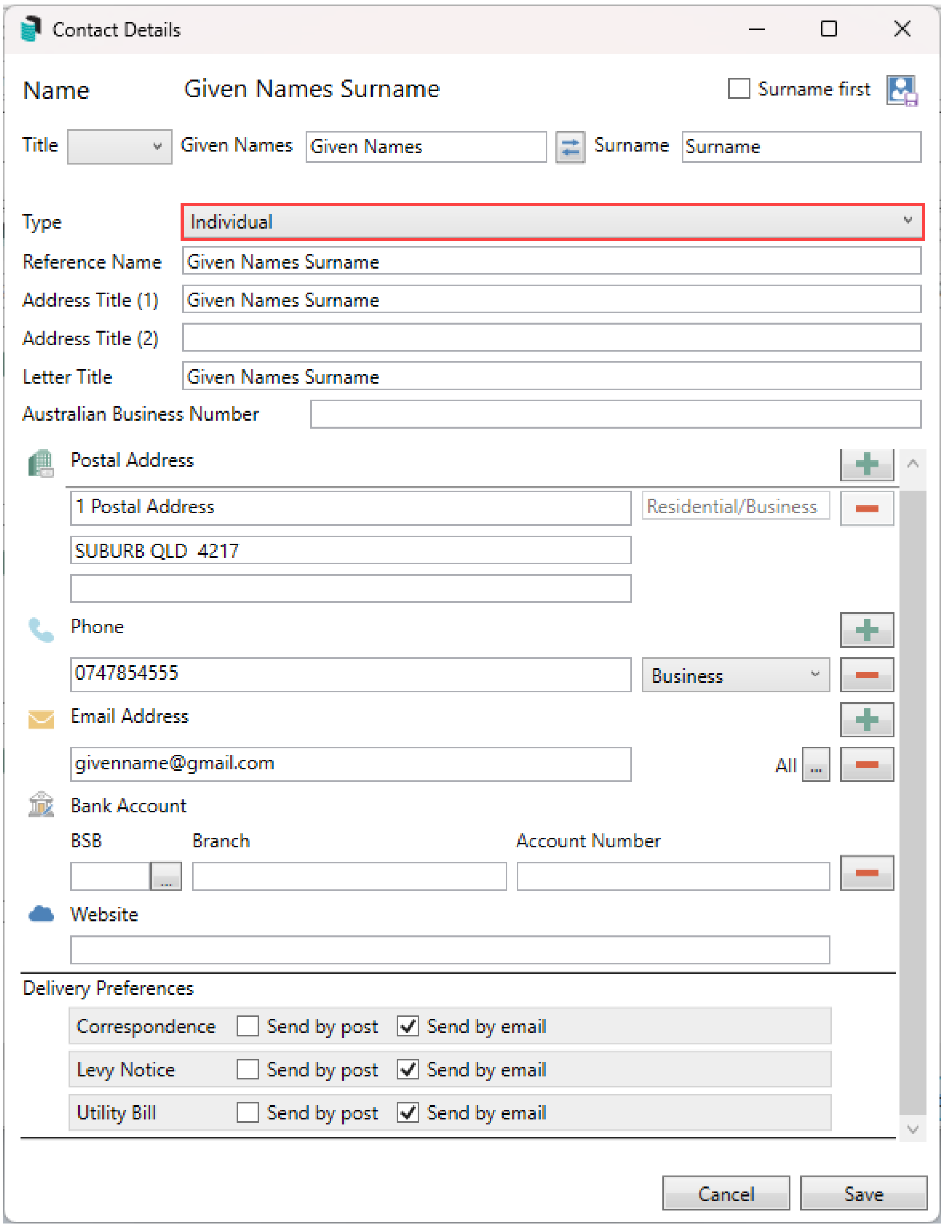
This facility is designed to allow for billing outside of a standard levy process. Examples may include billing for storage spaces or common property rented to tenants or other entities. These debtors can have owner or non-owner records and provide them for various purposes. This type can also exist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

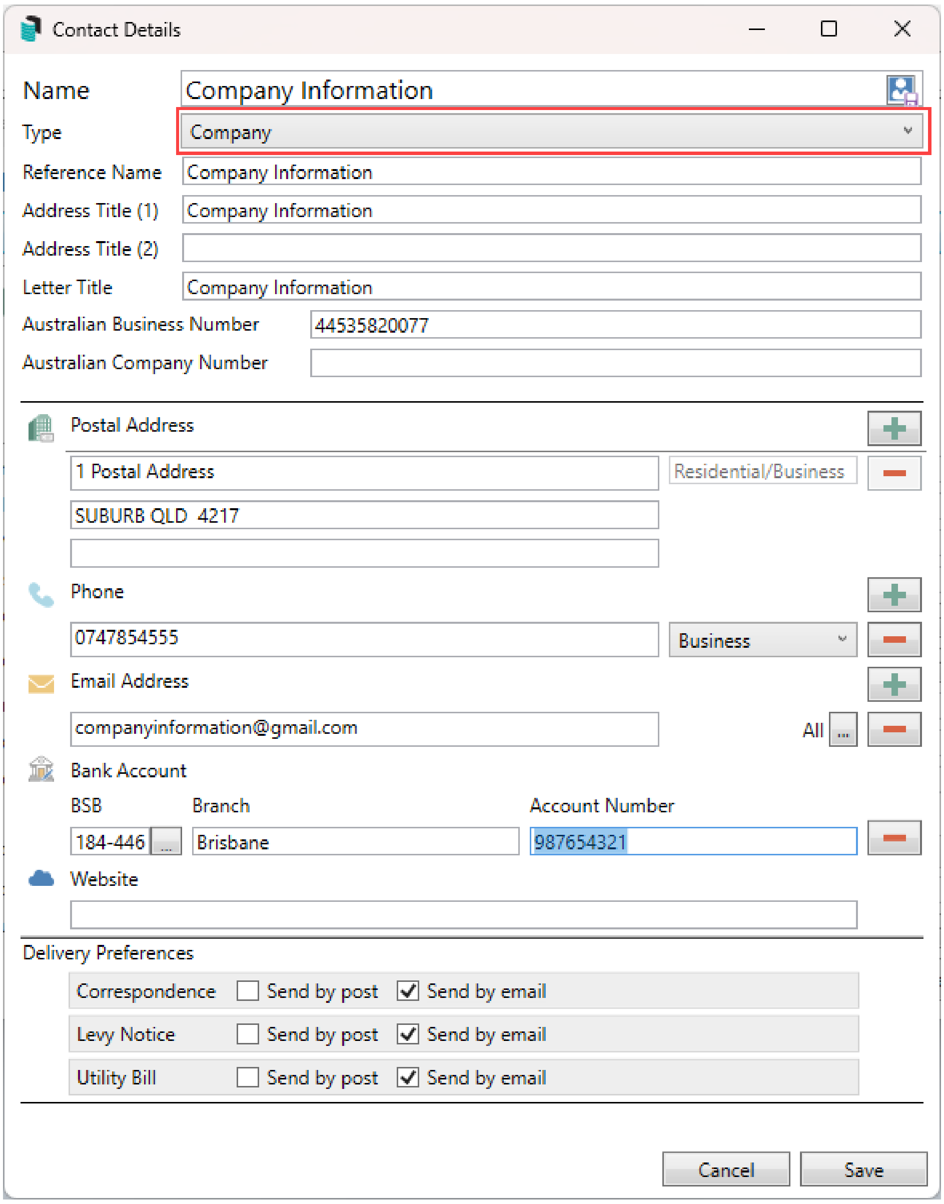
Add a New Second Debtor

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).***

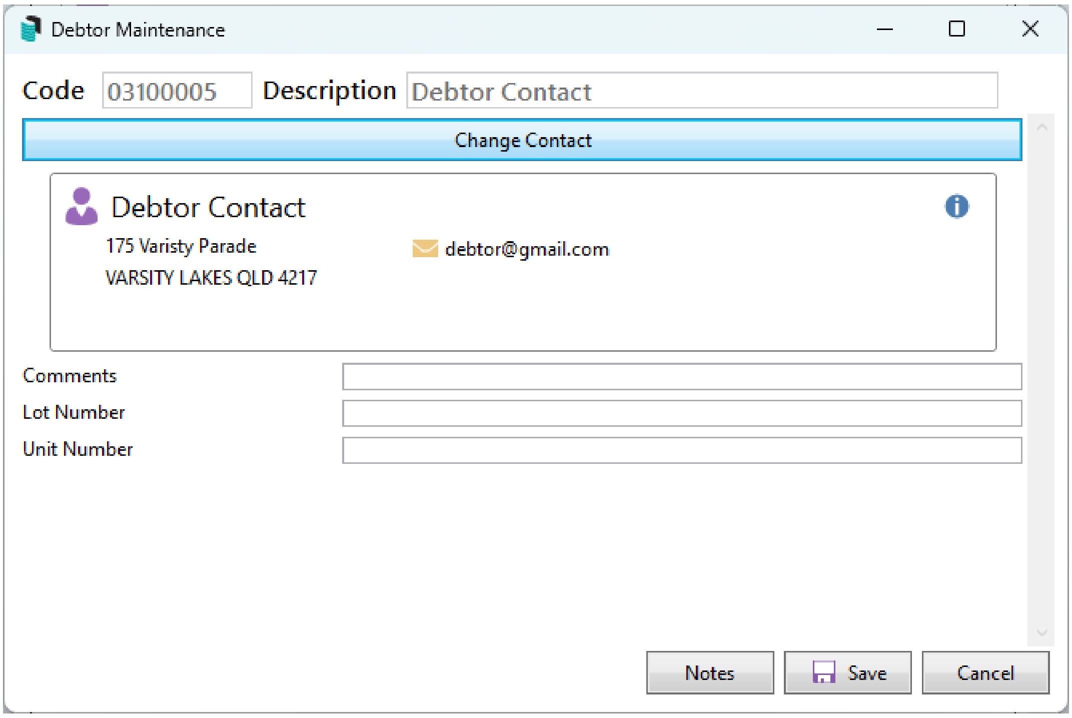
1. From either the Main or Sub-Group building search or select ***Debtor (Second Debtor)***.
2. Click *Add New*.
3. Click *Create / Select Contact*.
4. Search for the contact using the search bar. If there is no contact available, click *Create Contact*.
5. Complete the field information, changing the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



- The company will contain information like this.



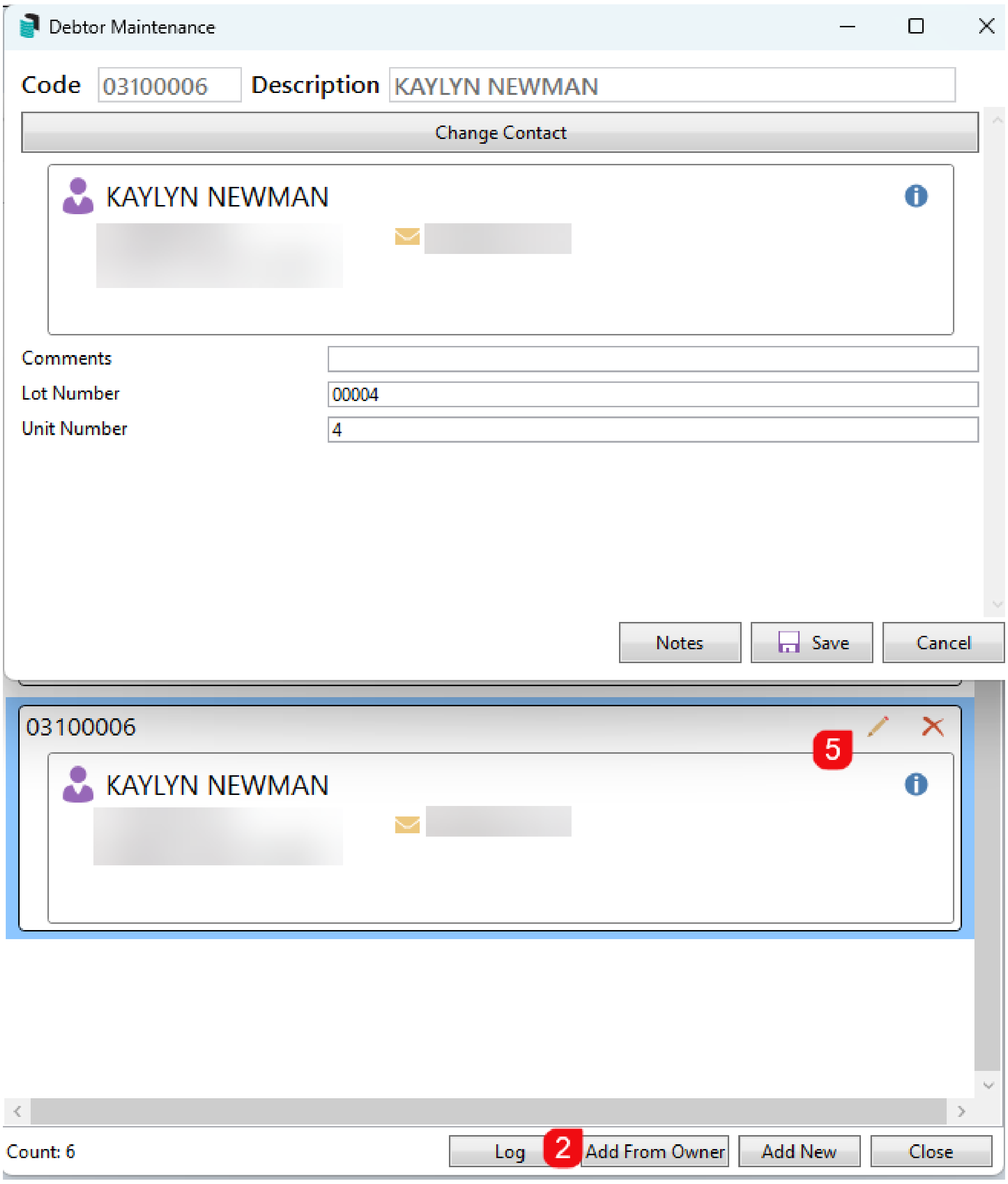
6. If there is an email address, set the delivery preference for the contact and click *Save*.
7. Additional fields from the ***Debtor Maintenance*** window, including *Notes*, will be available to complete where required. Click *Save* to finalise the Debtor Setup.



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.

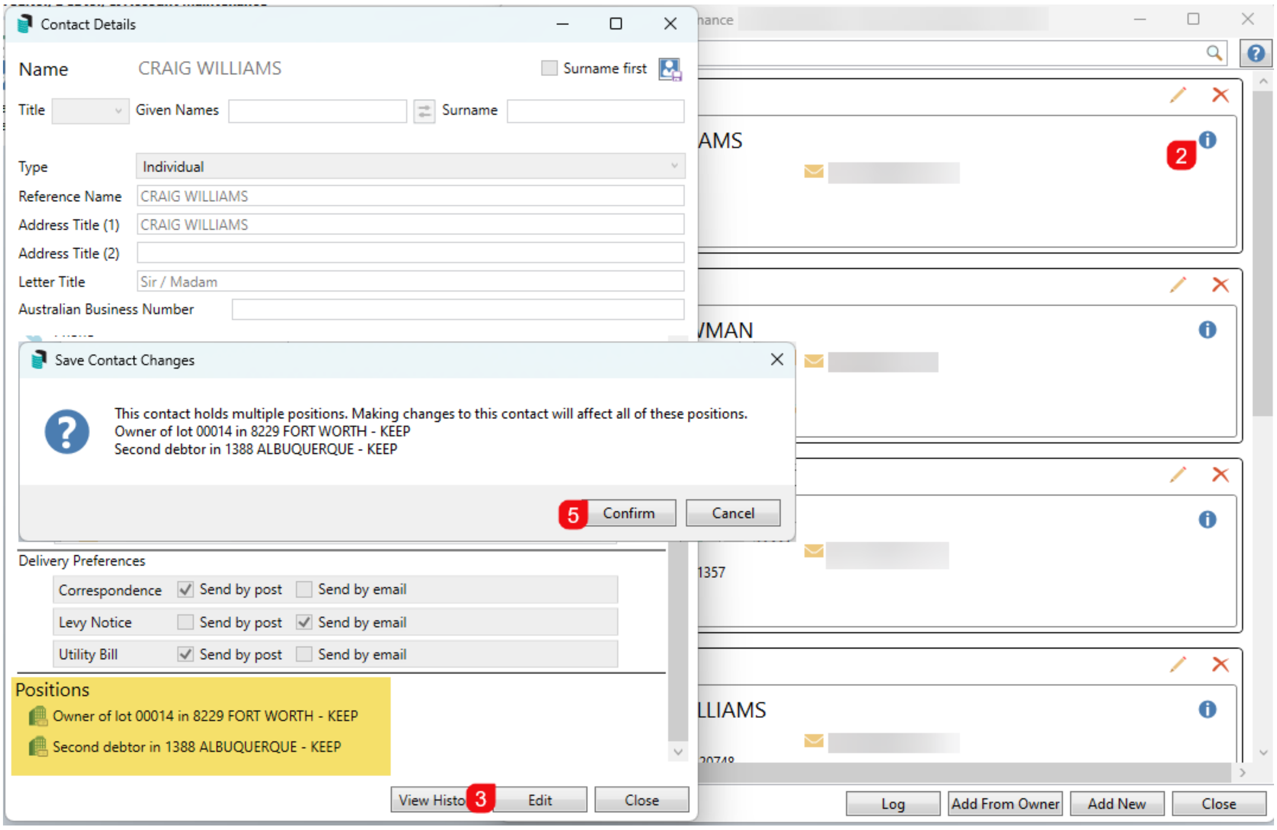
1. Search or select ***Debtor (Second Debtor)***.
2. Click *Add From Owner*.
3. From the *Account Code List* of ***Roll*** records, select the contact required.
4. This will add the contact to the Secondary Debtor Maintenance area.
5. If the information needs to be reviewed, click the pencil icon to 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.

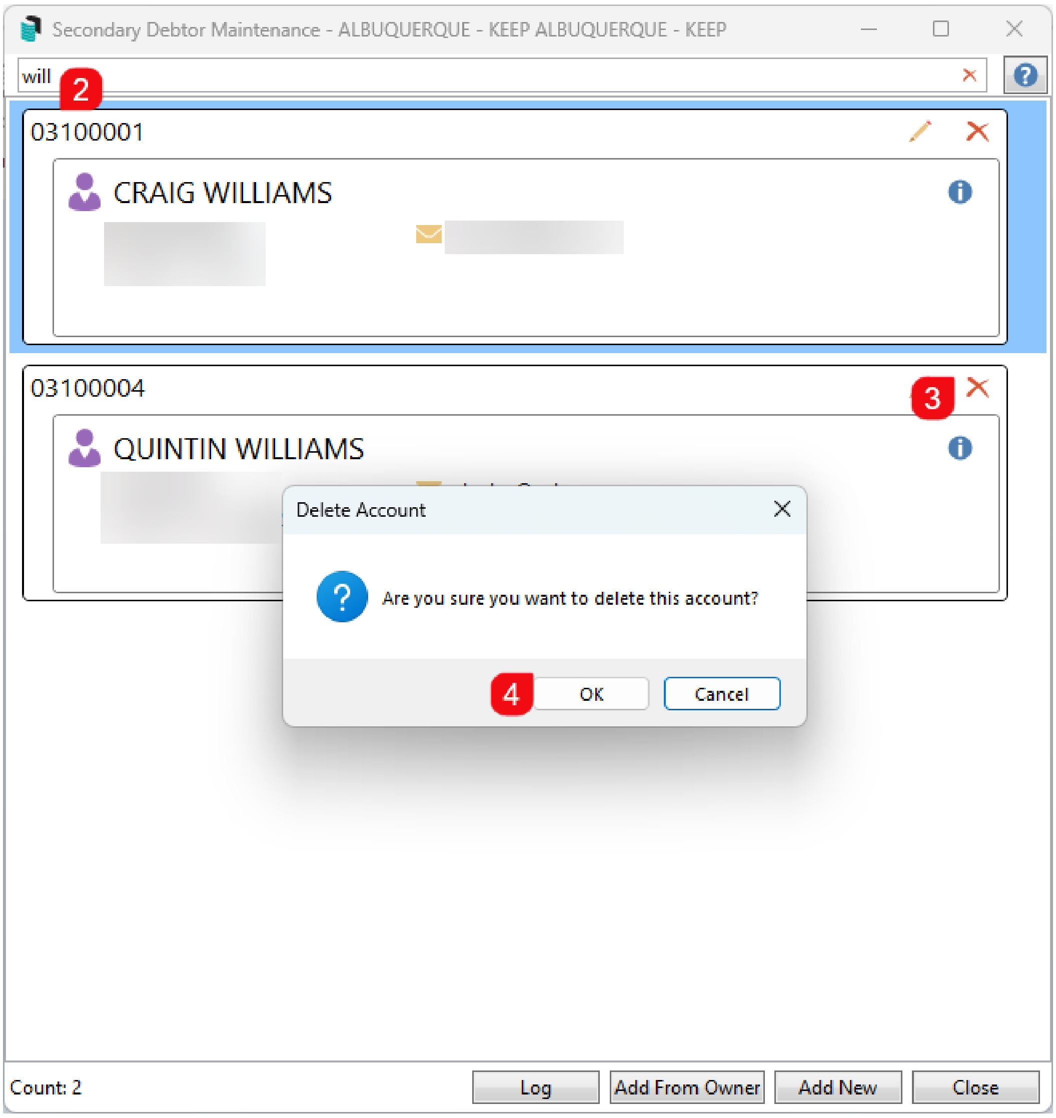
1. Search or select ***Debtor (Second Debtor)***.
2. Click the blue i icon to confirm the positions of the contact.
3. Click the *Edit* button.
4. Update the information as needed and click *Save.*
5. When saving the contact there will be a confirmation message: This contact holds multiple positions.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