Local and Global Debtors

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The instructions in this article relate to ***Local Debtors*** and ***Global Debtors.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Local Debtors and ***Global Debtors*** are designed to display and report all Debtor details from the ***Roll*** and ***Second Debtors***. These icons provide the search functionality for Lot and Unit numbers including Second Debtors and also Sub-Groups and can be used to produce a report of debtor details such as all owners in a building to excel. The difference between the two icons is that ***Local Debtors*** will display data for the selected building and the Building Filter is available in the ***Global Debtors*** to report across your portfolio.

Security Setup

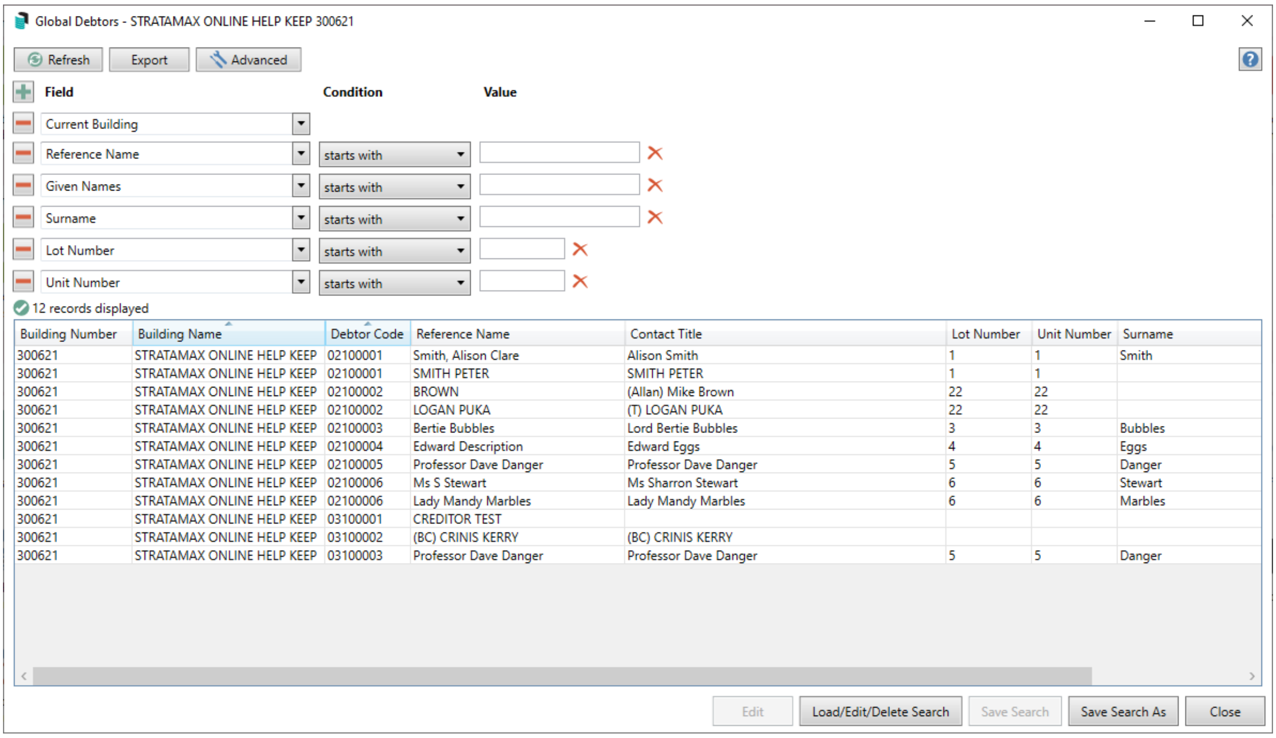
To access ***Local Debtors*** and ***Global Debtors***, the user must have permission set to 'Allow' for *Local Debtors* and *Global Debtors* under the 'Menu' category in ***Security Setup***.

Local Debtors and Global Debtors

Local Debtors is best used for a single building, and ***Global Debtors*** does not include a building restriction and can have the Current Building adjusted to display all debtor records globally. Both are designed to assist with reviewing and reporting on Debtor information from the Roll or Second Debtors in the Main and Sub-Group.

1. Search or select ***Local Debtors*** or ***Global Debtors***.
2. By default, the fields Reference Name, Given Names and Surname will be applied along with Unit Number and Lot Number. The ***Global Debtors*** will include the field Current Building.
3. To add another field, click the green plus button, then select the **Field** by clicking the drop-down menu.
4. Based on the selected **Field,** the **Condition** can be changed if required, and then you can change/choose the required **Value**.
5. Click the *Advanced* button to display additional tabs down the left side:
    - *Columns* to add, remove, or change the order of the columns.
    - *Sort Order* to change how the data in the table is sorted (by column, A-Z, etc.)
    - *Advanced* to change the maximum number of records to display in the table (10000, 1000, etc.).
6. Click the *Refresh* button to display the records.

7. If you would like to, you can export the data to an Excel sheet by clicking the *Export* button.
8. If the search contains useful restriction and column sort order fields that are frequently reviewed, it can be saved as a saved search for regular use.



Edit

You can edit the Debtor Contact from each of these search screens. This will provide a quick access area to the Contact card, allowing you to edit the details if required.

1. Select the Debtor and click the *Edit* button.
2. Review the Contact and if required click Edit to make adjustments to the Contact card. If this Contact is used across the portfolio the changes will be applied.
3. Click *Save*.

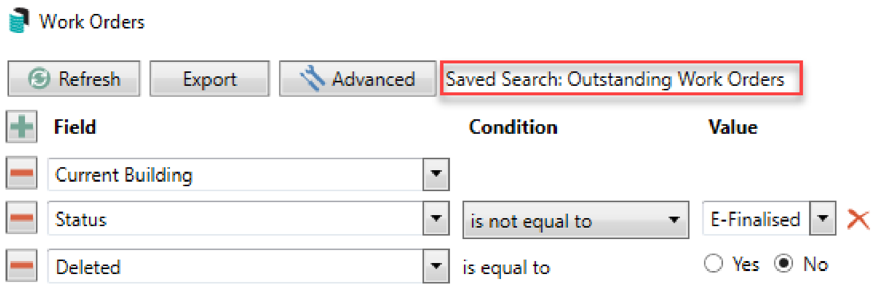
Local Debtor or Global Debtor | Saved Searches

'Saved Searches' are designed for convenience so that you can save a selection of fields, columns, and a specific sort order so that it can be loaded later.

'Saved Searches' can also be set as the 'default' search for the selected screen. This means that the selection of fields, columns, and specific sort order will be the one chosen whenever the menu screen/icon is selected.

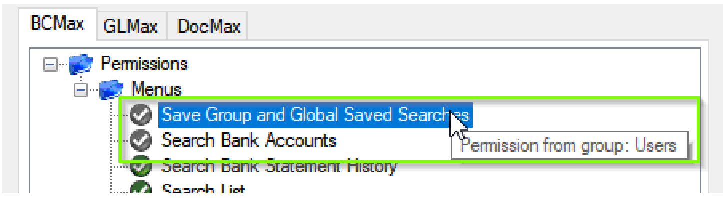
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

If a Saved Search is loaded/opened this will be noted at the top of the search screen.

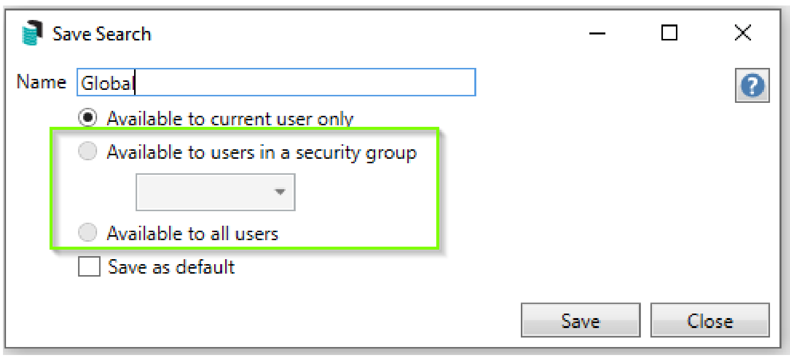


Saved Searches | Security Setup Permissions

A security permission will either allow or deny individual *Users* or *User Groups* access to create or delete a search. The permission is called ‘Save Group and Saved Searches’ under the 'Menus' category in ***Security Setup***. You can also type the word ‘Search’ into the filter field and click the *Filter* button to see the permission.



If the *User* or *User Group* do not have the permission set to 'Allow' then the ability to save a search for all users or a user group will be inactive.



Saved Searches | Set up a new Saved Search

1. Configure the required fields and click the *Refresh* button to display the required data.
    - Optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
2. Click the *Refresh* button to display the data.

3. Click the *Save Search As* button, and the 'Save Search' window will appear.
4. Enter a 'Name'.
5. Select one of the three radio buttons, depending on your requirement:
    - *Available to current user only* will save the search for the current user only.
    - *Available to users in security group* will save the search for the *User Group* selected from the drop-down (this radio button is only available if you have the right permission, and the *User Groups* available in this list are limited to the *User Groups* that you are a member of).
    - *Available to all users* will save the search for all StrataMax users (this radio button is only available if you have the right permission).
6. Optionally tick the *Save as default* box to load this 'Saved Search' whenever the menu screen/icon is opened.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search*, or click the red cross button to delete the *Saved Search*.
3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh automatically and load the *Saved Search* data.
4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

When a Saved Search is loaded/opened, the Saved Search name will be noted at the top of the search screen.

Saved Searches | Edit a Saved Search

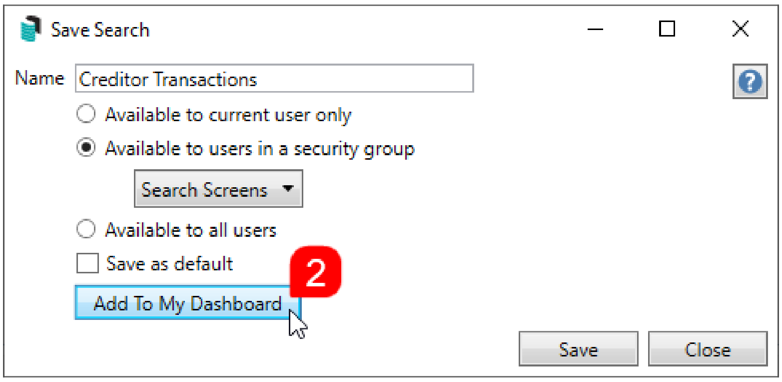
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required fields, and optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
4. Click the *Refresh* button to display and check the data.
5. Click the *Save Search* button to save the applied changes.

Saved Searches | Add To My Dashboard

As of *StrataMax version 5.6.98*, there is the option to add certain searches to your own ***Dashboard***. This is limited to your own ***Dashboard*** only (you cannot add it to the ***Dashboard*** of another user or group), and only available in these specific 'Search' screens:

- ***Search Bank Accounts***
- ***Search Creditor Invoice Items***
- ***Search Work Orders***
- ***Search Quotes***
- ***Search Building***
- ***Search Inspections***
- ***Search Levies***
- ***Management Fees Report***

1. Follow the steps to set up a new Saved Search, or edit a Saved Search (see the two relevant sections above).
2. In the 'Save Search' window, click the *Add To My Dashboard* button.



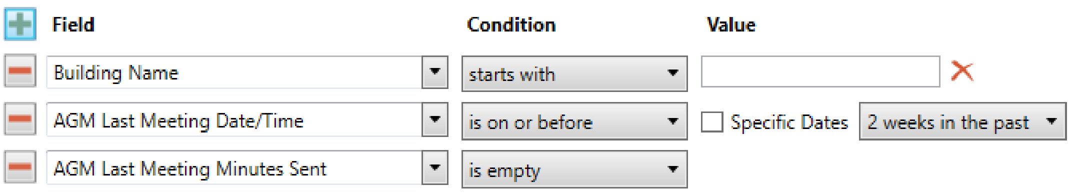
3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See *Display Types* for more information.
7. Tick *Show On Desktop* if preferred.
8. Depending on which *Display Type* was chosen, the fields for the different number values will change. Observe the *Preview* to assist with picking the right number values suited to the *Display Type*.
9. Click the *Save* button.
10. Back in the 'Save Search' screen, there are now buttons to *Edit Dashboard* and *Delete Dashboard*.
11. Click the *Close* buttons on any remaining screens.

Examples of Searches for Dashboard

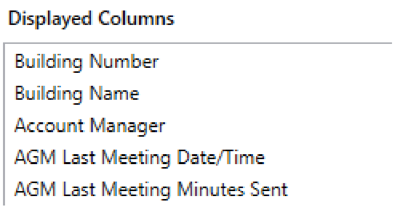
The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes and your particular setup of Restrict To, Display Columns and Sort Order may vary to suit your requirements.

Last AGM where minutes have not been sent (Search Buildings)

Restrict To:



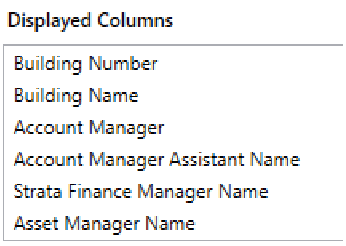
Display Columns:



Assigned Team Members (Search Buildings)

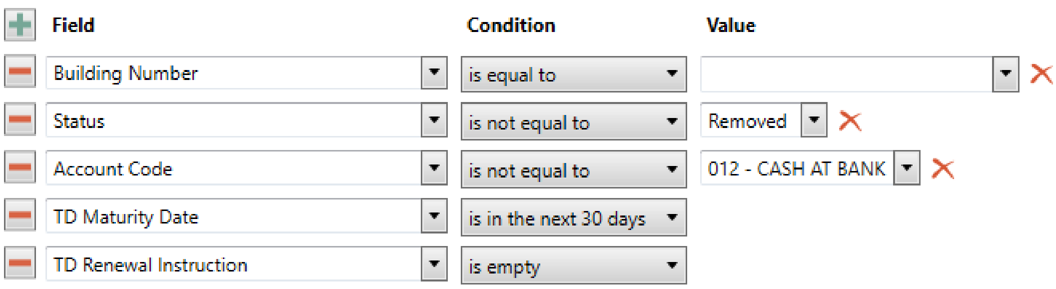
Restrict To: No requirements however you may filter by Account Manager for example

Display Columns:

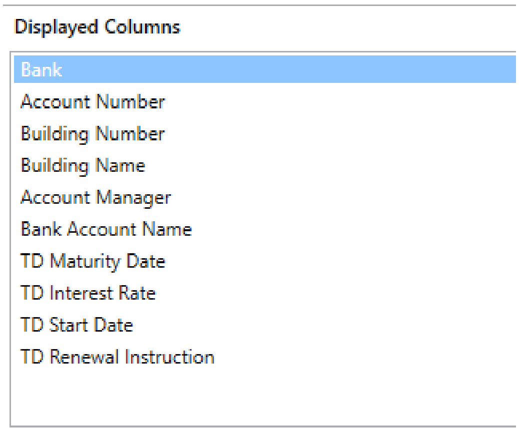


Term Deposits maturing in next 30 days where no instruction has been provided (Search Bank Accounts)

Restrict To:

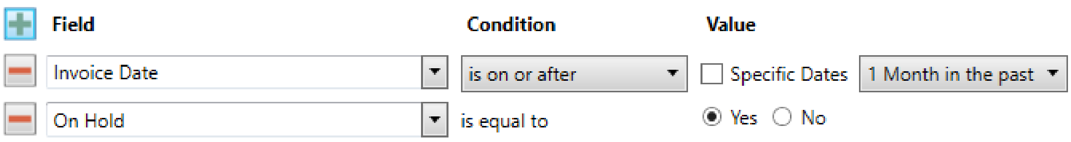


Display Columns:

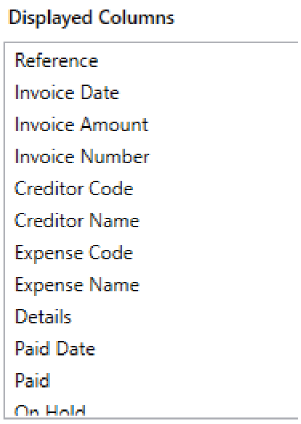


Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

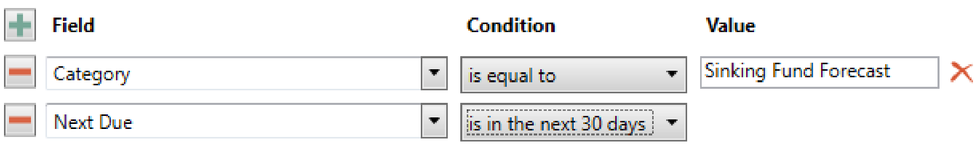


Display Columns:



Inspections due in next 30 days (Search Inspections)

Restrict To: setting the category to specific values allows dashboards specific to inspection types.



Display Columns:

Displayed Columns

- Building Number
- Building Name
- Category
- Period
- Next Due
- Last Due
- Inspected By Code
- Inspected By Name
- Result
- Result Rating