

Local and Global Debtors

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

Search Local Debtors and **Search Global Debtors** are used to report on debtor details from the **Roll** and **Second Debtors**, including lot and unit numbers and debtor records in the main group and sub-groups. **Search Local Debtors** reports on the selected building, while **Search Global Debtors** includes the **Current Building** field to report across your portfolio.

These searches can assist with everyday tasks such as reviewing owner and debtor details, checking debtor settings, and preparing debtor reports for a single building or across multiple buildings. Search results can be exported to Excel, and useful search setups can be saved for regular use.

Searches

Many [search screens](#) use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

Search Local Debtors and Global Debtors | Security

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

Search Local Debtors and Global Debtors | What it can report on

Search Local Debtors and **Search Global Debtors** return debtor information from the **Roll** and **Second Debtors**. Depending on the fields selected, the search can report on details such as reference name, given names, surname, unit number, lot number, current building, balances, and debtor-related settings.

This is useful when you need to review debtor records, check settings that affect debtor processing, or prepare debtor lists for follow-up and reporting. Use **Search Local Debtors** when you only need the selected building, and use **Search Global Debtors** when you need to review debtor records across your portfolio.

Search Local and Global Debtors | Recommended search examples

Review debtor details for one building or across the portfolio

This search can be used to review debtor details for the current building in **Search Local Debtors** or across multiple buildings in **Search Global Debtors**.

1. Search for or select **Search Local Debtors** or **Search Global Debtors**.
2. Use **Search Local Debtors** for the selected building, or use **Search Global Debtors** when you need to review records across your portfolio.
3. Add or remove the fields needed for your review.
4. Click *Refresh* to display the records.
5. If required, click *Export* to export the results to Excel.

The screenshot shows the 'Global Debtors - STRATAMAX ONLINE HELP KEEP 300621' window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. Below these is a search criteria form with columns for 'Field', 'Condition', and 'Value'. The 'Field' column contains dropdown menus for 'Current Building', 'Reference Name', 'Given Names', 'Surname', 'Lot Number', and 'Unit Number'. The 'Condition' column contains 'starts with' for each field. The 'Value' column contains empty text boxes with a red 'X' icon to the right of each. Below the form, it says '12 records displayed'. The main area contains a table with the following data:

Building Number	Building Name	Debtor Code	Reference Name	Contact Title	Lot Number	Unit Number	Surname
300621	STRATAMAX ONLINE HELP KEEP	02100001	Smith, Alison Clare	Alison Smith	1	1	Smith
300621	STRATAMAX ONLINE HELP KEEP	02100001	SMITH PETER	SMITH PETER	1	1	
300621	STRATAMAX ONLINE HELP KEEP	02100002	BROWN	(Allan) Mike Brown	22	22	
300621	STRATAMAX ONLINE HELP KEEP	02100002	LOGAN PUKA	(T) LOGAN PUKA	22	22	
300621	STRATAMAX ONLINE HELP KEEP	02100003	Bertie Bubbles	Lord Bertie Bubbles	3	3	Bubbles
300621	STRATAMAX ONLINE HELP KEEP	02100004	Edward Description	Edward Eggs	4	4	Eggs
300621	STRATAMAX ONLINE HELP KEEP	02100005	Professor Dave Danger	Professor Dave Danger	5	5	Danger
300621	STRATAMAX ONLINE HELP KEEP	02100006	Ms S Stewart	Ms Sharron Stewart	6	6	Stewart
300621	STRATAMAX ONLINE HELP KEEP	02100006	Lady Mandy Marbles	Lady Mandy Marbles	6	6	Marbles
300621	STRATAMAX ONLINE HELP KEEP	03100001	CREDITOR TEST				
300621	STRATAMAX ONLINE HELP KEEP	03100002	(BC) CRINIS KERRY	(BC) CRINIS KERRY			
300621	STRATAMAX ONLINE HELP KEEP	03100003	Professor Dave Danger	Professor Dave Danger	5	5	Danger

At the bottom of the window, there are buttons for 'Edit', 'Load/Edit/Delete Search', 'Save Search', 'Save Search As', and 'Close'.

Global report of second debtors with outstanding balances

This search can be used to review debtor records with outstanding balances in **Search Global Debtors**. In the supplied example, the *Balance* field is used as the restriction and is also added as a column.

1. Search for or select **Search Global Debtors**.
2. From the *Restrict To* tab, add the *Balance* field as a restriction.
3. Add the *Balance* field as a column if you want the balance to display in the results.
4. Click *Refresh* to display the records.

Global Debtors - STRATAMAX ONLINE HELP KEEP 300621

Refresh Export Advanced

Restrict To + Field Condition Value

Columns Balance is greater than 0

Sort Order

Advanced

1 First 1000 records displayed Find First Find Next

Building Number	Building Name	Debtor Code	Lot Number	Unit Number	Contact Title	Balance
3		02100059	59	59	H	491.86
3		02100061	61	61	K	574.82
3		02100062	62	62	I	3,634.68
3		02100063	63	63	N	0.25
3		02100065	65	65	N	5,602.78
3		02100071	71	71	K	2.36
3		02100074	74	74	N	67.36
3		02100080	80	80	L	0.06
3		02100082	82	82	C	5.61
3		02100082	82	82	R	5.61

Transactions Edit Print Load/Edit/Delete Search Save Search Save Search As Close

Global report of lots set to No Charge Interest

This search can assist with identifying lots that are currently set to not be charged overdue interest. This can be a useful search to save for regular review.

1. Search for or select **Search Global Debtors**.
2. Apply the field and restriction needed to return lots set to *No Charge Interest*.
3. Click *Refresh* to display the records.
4. If this information is reviewed regularly, save the search for future use.

Global Debtors - 1-11-2014 10:10:10 AM

Refresh Export Advanced

+ Field Condition Value

Is A Current Owner is equal to Yes No

Do Not Charge Interest is equal to Yes No

429 records displayed Find First Find Next

Global report of lots recently charged interest with a small account balance

This search can assist with reviewing lots that have recently been charged overdue interest and now have a small balance owing. This can be useful when following up debtor balances that may need further review.

1. Search for or select **Search Global Debtors**.
2. Apply the restrictions needed to return lots that have recently been charged overdue interest and now have a small balance owing.
3. Click *Refresh* to display the records.
4. If required, review whether a follow-up action such as a [Debtor Adjustment](#) is needed.

Global Debtors - STRATAMAX ONLINE HELP KEEP 250925

Refresh Export Advanced Saved Search: Overdues to Review

Field Condition Value

- Is A Current Owner is equal to Yes No
- Interest Debit Date is in the last 30 days
- Balance is in the range 0.01 to 20

74 records displayed

Building Number	Building Name	Debtor Code	Contact Title	Lot Number	Unit Number	Balance	Interest Debit Date
10001	10001 - 100	1000001	1000001	100	100	0.02	31/01/2025
10002	10002 - 100	1000002	1000002	100	100	0.02	31/01/2025
10003	10003 - 100	1000003	1000003	100	100	0.07	21/01/2025
10004	10004 - 100	1000004	1000004	100	100	0.08	31/01/2025
10005	10005 - 100	1000005	1000005	100	100	0.28	31/01/2025

Report on debtors with Arrears Notice Disabled

This search can be used to identify debtor records where *Arrears Notice Disabled*, previously known as *No Set Arrears*, is enabled.

1. Search for or select **Search Local Debtors** or **Search Global Debtors**.
2. Add *Arrears Notice Disabled* as a restriction if you want to filter the results.
3. If required, add *Arrears Notice Disabled* as a column.
4. Click *Refresh* to populate the search results.

Global Debtors - STRATAMAX ONLINE HELP KEEP 250925

Refresh Export

Restrict To Field Condition Value

- Reference Name starts with
- Lot Number starts with
- Unit Number starts with
- Arrears Notice Disabled is equal to Yes No

Arrears Notice Disabled is Yes, Sorted By Building Name A to Z, Debtor Code A to Z, Limited to 1,000 records

2 records displayed

Search Local Debtors and Global Debtors | Edit debtor contacts

You can edit the debtor contact from either search screen. This provides quick access to the contact card so the contact details can be reviewed and updated if required. If the contact is used across the portfolio, the changes will be applied where that contact is used.

1. Search for or select **Search Local Debtors** or **Search Global Debtors**.
2. Select the debtor and click *Edit*.
3. Review the contact card and, if required, edit the contact details.
4. Click *Save*.