

Invoicing for a Status Certificate in Strata Master

A status Certificate is often referred to as a 'Section Certificate' and is related to the Association types in Configure > Association Types.

These are provided to external parties by request, usually when a property is for sale or prior to settlement of a sold property. The information provided on these certificates is determined by Acts covering your country/state and in some cases, the type of entity.

It is important to note

- that the Certificate produced in Strata Master is produced as a Word document, so you are able to edit it to ensure all information provided is correct.
- due to your agency processing variations of Levies to accommodate Owners Corporation meeting resolutions and other issues, **the levy information needs to be matched against the owner ledger** and necessary edits made to the Certificate before issuance.

The Invoice

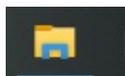
Depending on your agency's preferences and procedures, the invoice can be issued -

- with the Certificate, in the same document. To do this, the invoice is added **to the bottom of the Certificate Template**.
- as a separate invoice, in which case you will need to create your own document outside of Strata Master and issue it separately.

Access to the Template

Templates for Status Certificates can be accessed and edited as required.

Click on your File Explorer, where you will find your list of drives you have access to. On a Windows device click this icon at the bottom of your screen. Once again there could be variations to this as some devices settings have been customised.



The templates are found on your Server, in the Strata folder and then within the Strata folder in the Template folder. The path looks like \\your server details\Strata\Template.

Name	Date modified	Type	Size
Reg221.doc	11/03/04 2:53 PM	Microsoft Word 9...	29 KB
Section26.Doc	21/05/08 9:47 AM	Microsoft Word 9...	62 KB
Section36.doc	11/01/12 10:56 AM	Microsoft Word 9...	34 KB
Section37.doc	22/10/03 11:19 AM	Microsoft Word 9...	32 KB
Section37Simple.doc	22/10/03 11:20 AM	Microsoft Word 9...	41 KB
Section41.doc	02/11/12 2:20 PM	Microsoft Word 9...	44 KB
Section43.Doc	12/03/04 12:12 PM	Microsoft Word 9...	27 KB
Section75.doc	19/12/06 9:18 AM	Microsoft Word 9...	46 KB
Section107.doc	29/04/20 10:25 AM	Microsoft Word 9...	51 KB
Section119.doc	02/11/12 2:20 PM	Microsoft Word 9...	42 KB
Section139.doc	02/11/12 2:20 PM	Microsoft Word 9...	44 KB
Section151.doc	30/01/20 2:31 PM	Microsoft Word 9...	144 KB
Section151_2Lots.doc	30/01/20 2:31 PM	Microsoft Word 9...	155 KB
Section170.doc	27/01/04 8:56 AM	Microsoft Word 9...	47 KB
Section184.doc	30/07/19 1:54 PM	Microsoft Word 9...	91 KB

Adding the Invoice to the Template

This would be a 'once only' addition, as once added to the Template, the invoice will remain on the Template for future Certificates.

1. Prepare an invoice as a Word Document.
2. Open the relevant Section Template, and simply cut and paste the invoice to the last page of the Certificate.
3. Ensure you have inserted a pagebreak so the invoice will always show on its own page, regardless of what other editing is performed on individual certificates.
4. Ensure that the amount of the Invoice is updated should the fee change.

How the Fee is charged to the Strata Plan

When the funds are received for the Strata Certificate, a receipt is created to account Status Certificate Fees, this triggers the creation of fees charged to the Strata Plan to pay your agency for the work done.

The screenshot shows the 'Receipting' software window with the title 'Receipting into bank account: Rockend Strata Management ITF SP 2222'. The main form is titled 'Levy or Owner Invoice' and has a tab labeled 'Other Receipt to Owners Corporation'. The form includes a search field for 'Enter Plan No. or Street Name or Body Corporate Name.' with a dropdown menu showing 'Strata Plan 2222, Abbey Road Studios, 22 Perry Lane, LIVERPOOL NSW 2170'. Below this, there are radio buttons for 'Investment redemption', 'Refund GST', 'Insurance claim', and 'Other receipt type'. The 'Other receipt type' is selected, and there are dropdown menus for 'Account' (set to '146500 Status Certificate Fees - Admin') and 'Group'.

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