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Changing Creditor Compliance in Strata Master

Creditor Compliance is the function of maintaining insurance and other compliance requires for Creditors and contractors. Every Agency will make a selection in Strata Master to inform the system how to proceed with Creditor details and payments.

This article refers to any change, whether setting up or deactivating and provides guidance in navigating to the relevant compliance configuration locations in Strata Master.

To Make a Change or Set Up Creditor Compliance

Should you wish to make a change to your Creditor Compliance method, enquiries are not handled by Strata Support. Strata Support is able to pass on a request for contact in this regard, or you can email the relevant section directly -

Please email our Education section on education.apac@mrisoftware.com

Where to Find the Options, to Check What Compliance You Currently Use

The options are selected in Configure > Agency > Option #3 tab.

🖏 Agency Configuration - Read Only Mode							>	\times	
General Details Options #1 Options #2	Option #3	Trust Account	Bank Account	Stationery	Manag	gement Fees	Licensing		
Creditor compliance	Document man	agement				Maintenance —			
Not involved	C Strata Mas	ster				Strata Mas	ter		
C Managed by agency	File Smart Configure File Smart					C MRI Strata Connect			
C Managed by MRI Strata Connect									
C Managed by Trades Monitor									

Where Compliance Records are Located Once in Use

Compliance Records are located and maintained in the Manage > Creditors > Creditor Compliance tab on the individual Creditor cards.

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🖞 Creditor - Read Only Mod	e					×
<u> </u>						?
Select creditor	Action Lawns & G	ardens	💌 🗆 Include in	active creditors		
General Details	Creditor Compli	iance	Outstanding Invoices	CRN	Barcode	
Last used 12	1/12/2018		System calculated compliance status			
Last manual status updated DI	О/ММ///// 🚔 🚽	Manu	al compliance status Comp	oliant 💌 Co	de: Y	
		WH	IS compliance status Comp	oliant 💌		
Туре	Sum Insured	Expiry date	Comments		Status	^
Insurance-Workers Comp	\$150,000	30/06/2022			Compliant	
Insurance-Public Liability	\$20,000,000	30/06/2022			Compliant	
OH&S-Work Safety		30/06/2022			Compliant	
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What do Compliance Records do?

Compliance records in Strata Master will create warning pop ups that alert you to out of date insurances or licences when you select the creditor.

Looking for a Different Kind of Compliance such as Pool Signage?

https://kb.rockend.com/help/compliance-register-setup-and-use-guide

https://kb.rockend.com/help/strata-master-top-tip-8---legislation-compliance-reminders

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