

## Assigning a Lot to A Debt Collector in Strata Master

Once a Lot has progressed to Stage 3 Debt Recovery due to arrears, they will be assigned to a Debt collection Agency for follow up of the Arrears.

These are the steps to Forwarding the file details to a nominated Debt Collection Agency.

## Steps

- 1. Navigate to Manage > Debt Collection
- Manage Accounting Reports Wizards Co Diary Ctrl+D Registers Ctrl+H Reminders Configuration Creditors **Owners Corporations** Ctrl+O Owners Ctrl+N Contacts Group Reporting Interim Reporting AGM Preparation Insurance Claims Ctrl+M Debt Collection Repairs & Maintenance Quick Work Orders Ctrl+W
- 2. The screen below opens. Place the radio button beside "initial referral'.

Debt Collection							8
• A+-3R •							
C Levy payment notification	Debt collector			•			
Initial referral							
Plan   Lot no.   Owner's name	Debt recovery s	Total owing Date	interest calculated	Last receipt d	Last receipt no.	Last amount re	Debt collector na

3 Enter the nominated Debt Collectors details from the Creditor Card. This Creditor Card should have been set up at the time of, or prior to, the Plan being added to Strata master. The balance of the screen would be expected to be blank if processing is up to date.



3. Click the Search binoculars.



4. The latest Lots added to Stage 3 Debt Recovery will show on the screen. Note that if a Plan has allocated a different Debt Collection Agency, then they will not show in this screen until you select that nominated Debt Collectors Creditor card.

Debt Collection										×
📼 🙈 🕂 💳 ≽	🖻 🛕 🛽									
C Levy payment notificat	on D	ebt collector	COCO	Collection C	Corporation		-			
Initial referral										
Plan Lot no. Own	er's name	Debt recove	rys	Total owing	Date interest calcul	ated La:	st receipt d	Last receipt no.	Last amount re	Debt collector na
4444 7 Davi	d Cannelloni	Stage 3		\$8,731.43	15/08/2018					Collection Corpo
-										

5. Select the preview button

6. A report opens listing all the details that will be sent to the nominated Debt collection Agency. An owners ledger is also sent.

		m	ri	Deb for Collec	t Collection tion Corpora	tion				
Plan no.	Lot no.	Debt recovery stage	Total amount owing	Date interest	Strata manager	date		Last receipt	amount	
Owner's na	me	Owr	ner's address	curculated to		Owner's pho	ne numb	ers & email ad	dress	
4444	7	Stage 3	\$11,607.27	04/05/2022	Trainee McTrainer	29/0	3/2018	170	\$613.25	

7. Select the email icon.

		ς.	
		Я.	
$\sim$		а.	
<u> </u>	-		

8. Your outlook will flash and there will be an email ready for you to edit and send. The email with have 2 attachments as mentioned in step 6.

Subject	STRATA Master Notification: Initial referral for lot owners	in debt collection
DebtCollection.pdf	✓ OwnerLedger.pdf ✓ 18 KB ✓	

Please see attached report for lot owners that are referred to you for debt collection.

9. Once you have completed this process, and successfulLy sent the emails, you can click the Process button.



10. This button removes the sent items from the screen and the screen returns to its blank state. This ensures that you will always know that whatever shows on the screen has not been processed. Click ok to this message.

Strata Master	1.1	×
Notification to the debt collector fo	or lot owners has been clear	ed.
	0	

11. The blank screen after processing.



04/05/2022 7:07 pm AEST