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List of Excluded Lots and Payment Plans in Strata Master

It is possible to exclude a Plan, or Lots from Debt Recovery, and to also note some Plans as being on an arranged payment plan. Once on a payment plan, the Lot is also Excluded form Debt Recovery.

You may need to check from time to time, who is excluded or on a Plan to check whether that exclusion still applies.

Steps To Generate the List

1. Click on the Quick Reports icon in the Icon toolbar



2. Click on the Lots tab

| 🔂 Quick Reports | | | | | | | | |
|---------------------------------------|-----|----------|----------|----------|-------------|-----------|------------|--|
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| Corporations Lots Registers Insurance | R&M | Receipts | Payments | Contacts | Cr.Invoices | Creditors | Meetings | |

3. Select the Output Option as 'Show debt recovery'

| Quick Reports | | |
|---|---|--|
| 📼 🛋 🗟 🙈 🖓 👉 📕 🖻 | | @ |
| Corporations Lots Registers Insurance | R & M Receipts Paymen | ts Contacts Cr.Invoices Creditors Meetings |
| Owners Corporation Details Plan No. Manager Street No Town Postcode Managed? Managed plans C Unmanaged plans C All plans | Dutput Options Show current owners Show linked owner contacts Show previous owners Show revidents Show revidents Show committee members Show current debt recovery Show debt recovery charges | Lot Search Criteria Registered lots C Additional debtors C All Other Search Criteria Show position Debt Recovery Search Criteria Payment plan "Select All Stage "Select All Debt collector |
| | Show submeter lots Show status certificate history | Select All |

4. Click Search Binoculars.

5. Screen populates the List. The list below is a short one, so all Lots can easily be seen. Note the column for Debt recovery stage and Payment Plan.

| Corporations Owners Corporation | Lots Registers | Insurance | | | | | | | |
|---|---|--|---|---|---------------------------------|---|-------------|---|---|
| | | | | Receipts Pay | ments | | Cr.Invoices | Creditors | Meetings |
| Plan No. Street No Town Managed? • Managed plan | Manager *Select All Street Postcode | • | Output Options C Show current or C Show linked ow C Show previous C Show residents C Show mortgage C Show committee C Show current d | nner contacts owners s e members | | ot Search Criteria Registered lots ther Search Criteria Show position ebt Recovery Search | | lebtors C / | \II |
| · Manageu pian | ns v uninanaged plans | C All plans | Show current de Show debt reco Show submeter Show status cer | lots | | 'ayment plan <mark>"Selec</mark> Stage "Selec ebt collector <mark>"Select A</mark> | st All | | ¥ |
| Lot # | unit # Name on title | C All plans | C Show debt reco C Show submeter C Show status cer | very charges lots | | Stage Select st collector | st All | Charge | |
| Lot # | Unit # Name on title 1 Jeremy Bullfrog | Current owner? Yes | Show debt reco Show submeter Show status cer Debt recovery s Stage 2 | very charges lots tificate history Last receipt date 2018-07-31 | Payment | Stage Select ebt collector Select A Plan Action date 2022-05-04 | | \$0.00 | Amount su \$2,147.71 |
| Lot # | Unit # Name on title 1 Jeremy Bullfrog 2 Peter Rabbit | Current owner? Yes Yes | C Show debt reco C Show submeter C Show status cer Debt recovery s Stage 2 Stage 2 | very charges lots titlicate history Last receipt date 2018-07-31 2018-07-31 | Payment No No | Stage "Select ebt collector Select A plan Action date 2022-05-04 2022-05-04 | | \$0.00 \$0.00 | Amount su \$2,147.7 \$2,147.7 |
| Lot # 1 2 6 | Unit # Name on title 1 Jeremy Bullfrog 2 Peter Rabbit 6 Boscaida & Compa | Current owner? Yes Yes Yes | C Show debt reco C Show submeter C Show status cer Debt recovery s Stage 2 Stage 2 Stage 2 | very charges lots tificate history Last receipt date 2018-07-31 2018-07-31 2019-02-19 | Payment No No No | Stage "Select ebt collector plan Action date 2022-05-04 2022-05-04 | t All | \$0.00 \$0.00 \$0.00 | Amount su \$2,147.7 \$2,147.7 \$3,496.1 |
| Lot # | Unit # Name on title 1 Jeremy Bullfrog 2 Peter Rabbit 6 Boscalol & Compa 7 David Cannelloni | Current owner? Yes Yes Yes Yes | C Show debt reco Show submeter Show status cer Debt recovery s., Stage 2 Stage 2 Stage 2 Stage 3 | very charges lots tificate history Last receipt date 2018-07-31 2019-02-19 2019-08-29 | Payment No No No No | Stage "Select A Plan Action date 2022-05-04 2022-05-04 2022-05-04 2018-08-15 | | \$0.00 \$0.00 \$0.00 . \$25.00 | Amount su \$2,147.7 \$2,147.7 \$3,496.1 \$788.7 |
| Lot # 1 2 6 | Unit # Name on title 1 Jeremy Bullfrog 2 Peter Rabbit 6 Boscaida & Compa | Current owner? Yes Yes Yes | C Show debt reco C Show submeter C Show status cer Debt recovery s Stage 2 Stage 2 Stage 2 | very charges lots tificate history Last receipt date 2018-07-31 2018-07-31 2019-02-19 | Payment No No No | Stage "Select ebt collector plan Action date 2022-05-04 2022-05-04 | t All | \$0.00 \$0.00 \$0.00 | Amount su \$2,147.7 \$2,147.7 \$3,496.1 |

6. You can print a copy of the report, export to an excel spreadsheet or save a copy.



To View Only Those on a Payment Plan

Click the "Payment plan" header twice and the Lots with a Yes, will float to the top of the list

| Yes No | |
|-----------|--|
| No | |
| | |
| No | |

To View Those in Stage 3 or a Particular Stage

There are 2 options for this view.

1. Click on the "Debt Recovery Stage" header and the list will reorganise into Stages

| >Debt recovery |
|----------------|
| Stage 3 |
| Stage 2 |
| Stage 1 |
| |

2. In the Debt Recovery Search criteria, you can select a particular stage.

| Debt Recovery S | Search Criteria— | |
|-----------------|------------------|---|
| Payment plan | *Select All | • |
| Stage | Stage 3 | • |
| Debt collector | | |
| S S | elect All | • |
| | | |

2a. Click the search binoculars

2b. The search list will only show the Lots in Stage 3

| Managed? Managed plans C Unmanaged | d plans C All plans | C Show Show C Show C Show | i mortgages i committee i i current deb i debt recovi i submeter lo i status certil | t recovery ary charges ts | Payment plan Stage Debt collector | - | • | |
|--|---------------------|------------------------------------|--|---------------------------------|---|----------------|-------------------|--------------|
| Plan # Address for sorting 4444 Chandos Street 1 Chan | | Lot # | Unit # 1 | lame on title | Current owner? | >Debt recovery | Last receipt date | Payment plan |

Further Filtering

You are able to filter further by -

- Plan
- Strata Manager
- Payment Plan Yes/No
- Debt collector
- reordering any column
- removing unwanted columns using the Configure Columns icon

Useful Links

https://kb.rockend.com/help/strata-master-top-tip-19---debt-recovery-exclusions

https://kb.rockend.com/help/staged-debt-recovery-setup-and-use-guide

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