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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

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Corporations Lots Registers Insurance R & M Receipts Payments Contacts Cr. Invoices Creditors	Me	etinas	٦

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

Quick Reports		
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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 Stage Telect
	 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.

B. Quick F	eports ions Lots Corporation Details No No aged plans	Registers Registers Manager -Select All Street Postcode Unmanaged plans	Insurance	R & M Output Options C Show current o C Show inked ov C Show previous C Show residents C Show commite Show commite C Show current d C Show current d C Show submeter C Show submeter C Show status ce	Receipts F writer contacts owners : : : : : : : : : : : : : : : : : : :	² ayments	Contacts Cot Search Criteria Registered lots Other Search Criteria Show position Debt Recovery Sear Payment plan Stage S	Cr.Invoices Additiona	Creditors	Meetings
	ot#Unit‡	I Name on title	Current owner?	Debt recovery s	Last receipt date	e Paym	ent plan Action date	Debt Coll	ec Charge	Amount su
	1	Jeremy Bullfrog	Yes	Stage 2	2018-07-31	No	2022-05-04		\$0.00	\$2,147.78
	2 2 E	2 Feter nabbit Reseatela & Compa	Yes	Stage 2	2018-07-31	No	2022-05-04		\$0.00	\$2,147.78 \$2,496.14
	7 .	5 Doscalula & Compa 7 Doscalula & Compaliani	res	Stage 2	2013-02-13	No	2022-03-04	Collection	\$0.00	\$3,435.14
	0 0	Mark Massannelloni	Yes	Stage 3 Chage 2	2010-00-23	NO	2010-00-10	Collection	1 \$20.00 #0.00	\$1 720 CE
	10 10	 Maix mascaponi Anthony Carbonara 	Yes	Stage 2	2013-02-13	No	2013-02-13		\$0.00	\$1,720.00 \$40.462.02
	2 10	2 James Halpert	Yes	Stage 1	2013-00-13	No	2022-03-04		\$0.00	\$1.062.03
		s oanos naper	165	orage i	2010/00/00		2010-00-03		\$0.00	\$1,000.01

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

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

Town	Postcode	C Show C Show C Show C Show © Show C Show C Show C Show	Initiked owner of previous owner: residents mortgages committee memi current debt recovery of submeter lots status certificate	ntacts pers pery harges history	Other Search (Show pos Debt Recovery Payment plan Stage Debt collector	ition Search Criteria "Select All Stage 3 Select All	1	
Plan # Address for sort	ng	Lot #	Unit # Name	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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