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# Process Manual Notification of Debt Recovery to Debt Collector in Strata Master

#### Summary

Learn the steps needed to send a Manual Debt Collection when only an invoice is overdue and understand how to Record a Manual Debt Recovery, where the Lot Owners Ledger and contact information is sent manually to a different Collection Agent. Also, find out what to do if you can't change the Debt Collection Agent on the Plan.

#### Covered in this article :

- Overview
- Record a Manual Debt Recovery
- When the Collection Agent is to be changed for one Lot..
- When the Debt Collection Agent on the Plan cannot be changed.

#### Overview

The Debt Collectors are generally notified of Stage 3 Debt Recovery Lots and any further payments made, through automated processes in Manage > Debt Collection. These notifications are processed to the Debt Collector named on the Financial tab of the relevant Plan.

There may be an occasion when a notification is to be made to a Debt Collector who is not the one named on the Plan, or when an owner has a debt only for an invoice. These notifications can be made through a manual process.

🐣 Lot Owner	- Mr Paul McC	artney	/ / Lot 2, Unit 2, S	trata Plan 2	222 - Edit	Mode								[	- 0	×
																?
General Agent/Tenant/Leases				γ	Levies			Notices		Mortgages		Debt Recovery		Einked Lots		
Status: Cun	rently not subject nt Plan N	to deb lotes	t recovery.										E E	Exclude fro	m debt reco	very
Action date	Debt recovery s	tage	Debt collector	Posted cł	Pending (	Waived o	Date cleared	Amount owi	Interest inclu	Interest calc	Payment plan	Notify	Notes			
27/11/2023	Stage 3	-	R H Consultants	\$0.00	\$0.00	\$0.00	27/11/2023	\$4,672.32	\$672.32	27/11/2023			Manua	ally created	to record re	atrosp
27/11/2023	Stage 2			\$0.00	\$0.00	\$0.00	27/11/2023	\$4,672.32	\$672.32	27/11/2023						
23/11/2023	Stage 1			\$0.00	\$0.00	\$0.00	27/11/2023	\$2,523.28	\$523.28	27/11/2023						
					- 											

### Record a Manual Debt Recovery

This option is generally used when only an invoice is overdue. In this case the overdue invoice itself does not trigger debt recovery, so cannot be processed through normal debt recovery processes.

1. Open the relevant Lot card and select the Debt Recovery tab

2. Click Edit and then click the 'Create Action' button.

🐣 Lot Owner - Rae Lasa	igna / Lot 5, Unit 5, Strata Pla	n 4444 - Edit Mode					- • •
	Fi 🖻 🖿 🖪						0
General	Agent/Tenant/Leases	Levies	Notices	Mortgages	Debt Recov	ery	Linked Lots
Status: Currently not su	bject to debt recovery.						
Payment Plan	Notes					🔲 Exclu	ide from debt recovery
Action date Debt recov	very stage Debt collector	Posted cł Pending (Waived	d c Date cleared Amount ow	iir Interest inclu Interest calc F	Payment plan Notify	Notes	
<							>
Class Data Daman	Drint Ulatare	Carata Antina					
Clear Debt Hecovery	Print History	Lreate Action					

3. The line below appears and the record is completed in Strata Master.

You will now manually forward relevant ledgers and contact details of the Lot Owner to the Debt Collector.

Status: Curr	rently not sub	ject to deb	ot recovery.										
🗖 Paymer	nt Plan	Notes											Exclude from debt recovery
Action date	Debt recov	ery stage	Debt collector	Posted cł	Pending (	Waived c	Date cleared	Amount owir	Interest inclu	Interest calc	Payment plan	Notify	Notes
03/01/2024	Stage 3		R H Consultants	\$0.00	\$0.00	\$0.00		\$2,521.00	\$381.80	03/01/2024		•	Manually created to record retrosp

# Record a Manual Debt Recovery When the Collection Agency is to be Changed

1. When the Lot is already in Stage 2 of Debt Collection, select the Financial tab.

2. Note the Debt Collector selected for the Plan. Click Edit and change the Debt Collector to the one you wish to use on just this occasion.

	This plan is i	managed	
Manager	Trainee Mc	Trainer	-
Registered lots	10	Primary lots	12
Total lots	10	Utility lots	0
Residential lots	5	Retirement lots	0
Commercial lots	5	Other lots	0
Financial year end	30/04/2022	2	- -
In initial period	Γ		
Levy year 01/01/2022 Print all attact	hments for Sta	To  31/12/2022 atus Certificates ∏	€▼
Exclude all lots from deb	ot recovery	<b>—</b>	
Exclude all lots from deb	ot recovery		
Exclude all lots from det	ot recovery		
Exclude all lots from det Debt collector COCO Collection	ot recovery n Corporation		•
Exclude all lots from det Debt collector COCO Collection Payment Plan approved	ot recovery n Corporation		•

3. If you receive a message that the debt collector cannot be changed, then it means that a Lot in this Plan is currently in debt recovery and processed with the current Debt Collector in place. If you are unable to

clear other Lots debt recovery, read through but do not action steps 4 to 11. Reading through is important to see how the process is meant to progress and how your workaround differs.

9	nory nequency   content	orarus continoare	
c	Strata Master	×	
,	There was debt collection assigned to the debt co You cannot change the debt collector until the de	ollector. tht is cleared.	
e	neserve runus 10.00	ОК	

Alternatively, if the other Lots are only in stages 1 and 2, you can clear the other Lot/s debt collection and push them through again once this Manual Debt Collector process has been completed.

4. Select the Lots tab, and then the relevant Lot that is to have the Manual debt collection assigned.

5. Select the Debt Recovery tab.

6. Note that the Lot is in stage 2 debt recovery. There is a button for 'Create Action', that is currently greyed out. Click the edit button.

🐣 Lot Owner - Linni Fett	ucini / Lot 1, Unit 1, Strata F	Plan 4444 - Read Only	/ Mode									x
📼 🗋 🔰 🏷	1 👌 🛗 🙇	<>										?
General	Agent/Tenant/Leases	Levies		Notice	28	Mortgag	es	Debt	Recove	ay )	Linked Lots	
Status: Currently in debt	recovery: Stage 2											
🔲 Payment Plan	Notes									E	xclude from debt recove	ery
Action date Debt recover	ery stage Debt collector	Posted cł Pending (	Waived c	Date cleared	Amount owir	Interest inclu Inte	erest calc	Payment plan	Notify	Notes		
27/12/2023 Stage 2		\$0.00 \$0.00	\$0.00		\$876.14	\$109.99 27.	/12/2023					
27/12/2023 Stage 1		\$0.00 \$0.00	\$0.00	27/12/2023	\$876.14	\$109.99 27.	/12/2023					
¢												>
Clear Debt Recovery	Print History	Create Action										

7. Then click the button "Clear Debt Recovery' and note the stage 2 has a 'date cleared' entered as todays date.

8. Then click Save.

9. In the Debt Recovery tab, click Edit > Create Action. In the example below, we cleared the stage 3 debt recovery processed on 27/12/2023 and then, on 3/1/2024, clicked Create Action with a new Collection Agency listed on the Financial tab of the Plan.

🐣 Lot Owner - Linni F	ettucini / Lo	ot 1, Unit 1, Strata Pl	an 4444 -	Edit Mod	e										×
General	Agen	t/Tenant/Leases		Levies	Ý	Notice	s Y	Mort	gages	Debt	Recove	ay (	Lir	iked Lots	
Status: Currently not subject to debt recovery.															
🗖 Payment Plan	Notes											ΠE	xclude from	debt recovery	
Action date Debt rec	overu starre	Debt collector	Posted cł	Pending (	Waived c	Date cleared	Amount owir	Interest inclu	Interest calc	Payment plan	Notifu	Notes			1
03/01/2024 Stage 3	,	R H Consultants	\$0.00	\$0.00	\$0.00		\$876.91	\$110.76	03/01/2024			Manua	lv created to	record retrost	
27/12/2023 Stage 3		Collection Corporati	\$0.00	\$0.00	\$0.00	03/01/2024	\$876.14	\$109.99	27/12/2023				,		41
27/12/2023 Stage 2			\$0.00	\$0.00	\$0.00	27/12/2023	\$876.14	\$109.99	27/12/2023						1
27/12/2023 Stage 1			\$0.00	\$0.00	\$0.00	27/12/2023	\$876.14	\$109.99	27/12/2023						1
															11
<														>	
1.															1
Clear Debt Recovery	P	rint History	Crea	te Action											

10. It is then important to go back to the Financial tab and reinstate the previous Debt Collection Agency.

11. If any Lots had their debt recovery cleared in step 3, re-process those lots through debt recovery.

## When The Debt Collector Cannot Be Changed

While it is preferable that steps 1 to11 above are followed, this option is a less suitable option.

1. Clear any existing debt recovery in the relevant Lot and click 'Create Action' as in steps above.

2. Click to Save and then click edit again.

3. On the General tab of the Lot, Enter details in the Notes section to correct the auto generated details in red.



11/01/2024 6:29 pm AEDT