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Add a Register Contract Item in Strata Master

Summary

Learn how to use the Contract Register to record details of items that will need to be followed up in the future. This can include a function test on the Pool pump or Garage door maintenance.

This article will take you through the steps to create a Register Contract item and then review your reminders for follow up:

- Contract Types
- Add a Register Contract Item
- Reminder of The Register Contract Item

Contract Types

There are many types on Contract that can be entered in Registers. The Contract type are set in Configure > Register Types > Contract Types.

Add a type if you need by clicking the Add button and entering a relevant name, then click the Save button.



Add a Register Contract Item

1. Select the Registers icon form the toolbar or navigate to **Manage > Registers.**



You are also able to select the Registers icon in the Corp screen.

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2. Select the **Contracts** tab. If necessary, enter the Plan number.

wners Corporation 6666 - Read	Only Mode									• 💌
T registered owners corporation se	ected		-							
er Plan No. or Street Name or Body	Corporate Name				Last levy notices w	ere printed on 1	7/03/2020.			
wners Corporation 6666										
5 Sportsman Road										
v				~~~~				~		
Contracts	Keys		Meetings		Proxy/Nominee	Improvem	ients/By Laws	Co	mplianc	e
			Contrac	t Register						
		-	-					-	1	-
Creditor	Contract type	Term	Commencement date	Expiry/due date	Communication Sent	Date Sent	Annual fee	Contact name	M	ų.
Strata Building Caretakers	Caretaker	3 years	01/06/2020	31/05/2023			\$65,000.00	John Waters	04	
Complete Cleaners	Cleaning	2 years	01/07/2020	30/06/2023			\$600.00		04	
complete cleaners			22/04/2020	22/04/2023			\$1.900.00	Trainee McTrainer	04	0.2
Rockend Strata Management	Agency Agree	3 Years	23/04/2020	22/04/2023					~	- 245

3. Click the edit button and the green cross becomes visible on the right hand side of the screen. This will then provide a blank line in the Register.

Contract Register											
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	Creditor	Contract type	Term	Commencement date	Expiry/due date	Communication Sent	Date Sent	Annual fee	Contact name	Mi	- A
	Strata Building Caretakers	Caretaker	3 years	01/06/2020	31/05/2023			\$65,000.00	John Waters	04	-
	Complete Cleaners	Cleaning	2 years	01/07/2020	30/06/2023			\$600.00		04	
Г	Rockend Strata Management	Agency Agree	3 Years	23/04/2020	22/04/2023			\$1,900.00	Trainee McTrainer	04	×
	Fire Control	Annual Fire Sa	1	01/07/2021	30/06/2023			\$0.00		04	

In this example we are adding a contract for Termite Treatment valid for 5 years.

4. Enter the contract type and any other relevant information.

Note: The expiry date can be the date you wish to review the item or the date you want it to appear in your reminders.

If you want to use reminders to list this item towards the Expiry/Due Date, select 'No' under Communication Sent column or leave blank as below.

onners corpo	ration 6666 -	Edit Mode									
GST registered o Enter Plan No. o	wners corporat Street Name c	ion selected r Body Corporate Name.	1			Last levy no	tices were printed on	17/03/2020.			
Owners Corporation 6666 The Champions 45 Sportsman Road CDBURG VIC 3058											
Contra	cts	Keys		Meetings	Prox	y/Nominee	uminee Improvements/By Laws Compliance				се
				Contract Re	egister						
Contract ty	pe Term	Commencement date	Expiry/due date	Communication Sent	Date Sent	Annual fee	Contact name	Mobile	Telephone 1	Tele	
Caretaker	3 years	01/06/2020	31/05/2023			\$65,000.00	John Waters	0411 222 666	1300 11 222		+
Caretaker Cleaning	3 years 2 years	01/06/2020 01/07/2020	31/05/2023 30/06/2023			\$65,000.00 \$600.00	John Waters	0411 222 666 0411 355 666	1300 11 222		+
Caretaker Cleaning Agency Ag	3 years 2 years ree 3 Years	01/06/2020 01/07/2020 23/04/2020	31/05/2023 30/06/2023 22/04/2023			\$65,000.00 \$600.00 \$1,900.00	John Waters Trainee McTrainer	0411 222 666 0411 355 666 0412 234 456	1300 11 222 9222 3333		+
Caretaker Cleaning Agency Ag Annual Fire	3 years 2 years ree 3 Years Sa 1	01/06/2020 01/07/2020 23/04/2020 01/07/2021	31/05/2023 30/06/2023 22/04/2023 30/06/2023			\$65,000.00 \$600.00 \$1,900.00 \$0.00	John Waters Trainee McTrainer	0411 222 666 0411 355 666 0412 234 456 0408 461 402	1300 11 222 9222 3333 9202 0258		+
Caretaker Cleaning Agency Ag Annual Fire Pest Contro	3 years 2 years tee 3 Years Sa 1	01/06/2020 01/07/2020 23/04/2020 01/07/2021 01/05/2023	31/05/2023 30/06/2023 22/04/2023 30/06/2023 30/06/2023			\$65,000.00 \$600.00 \$1,900.00 \$0.00 \$0.00	John Waters Trainee McTrainer Max Smith	0411 222 666 0411 355 666 0412 234 456 0408 461 402 0428 698968	1300 11 222 9222 3333 9202 0258 1800 010 590		*

5. Scroll across and enter contact details and any relevant notes.

You will note in this case I have listed the Contract and the individual inspections separately so that I can receive separate reminders for both.

Contracts		Keys	Ĭ	Meetings	Ť.	Proxy/Nominee	Improvements/By Laws	Complia	nce
				Contra	act Regist	ter			
Date Sent Ar	nnual fee	Contact name	Mobile	Telephone 1	Telephone 2	Notes			
\$6	65,000.00	John Waters	0411 222 666	1300 11 222					
	\$600.00		0411 355 666						
\$	\$1,900.00	Trainee McTrainer	0412 234 456	9222 3333					×
	\$0.00		0408 461 402	9202 0258					
	\$0.00	Max Smith	0428 698968	1800 010 590		Inspection each year to m	aintain validity		
	\$540.00	Max Smith	0428 698968	1800 010 590					_
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Reminder of The Register Contract Item

Using the reminder screen, you can check to see if any contract items are due for action.

1. Ensure the Contract item has either a 'No' or a blank Communication Sent field as in step 4 above. This should be done at the time of entering the item into the Register.

Communication Sent	Date Sent
1	

2. Select the Reminder icon in the tool bar or navigateto View > Reminders

3. Filter to all Plans or the required Plan and filter Function as 'contracts'. Filter by entering details in the blank fields.

4. Enter a date range to cover all required due dates. The list shows as below.

Reminders	This exampl	e, 6666 and contracts was key blank fields	ed in to these	
6666	Filter manager names	contracts	Filter details	From 22/04/2023 To 30/06/2023
Name	Manager Name	Function	Detail	Due Date
The Owners Corporation of SP 6666	Meg Manager	Contracts	Agency Agreement	22/04/2023
The Owners Corporation of SP 6666	Meg Manager	Contracts	Caretaker	31/05/2023
The Owners Corporation of SP 6666	Meg Manager	Contracts	Cleaning	30/06/2023
The Owners Corporation of SP 6666	Meg Manager	Contracts	Annual Fire Safety Statement	30/06/2023

20/08/2024 4:49 pm AEST