Add a Creditor Type in Strata Master

Summary

When adding a creditor card to Strata Master it is necessary to select a Creditor type from an existing drop down list, for example : plumber, electrician, builder or other relevant type. Learn how to add a creditor type when a relevant creditor type is not able to be selected from the existing list in Strata Master.
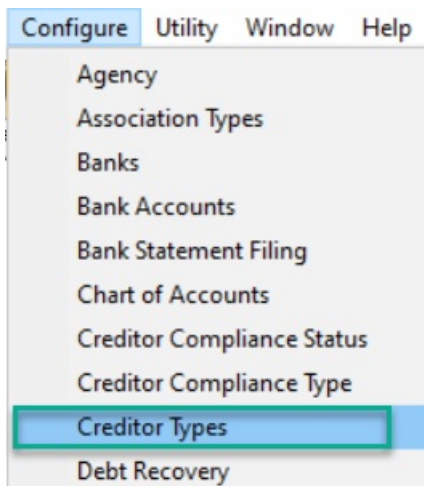
Steps included:

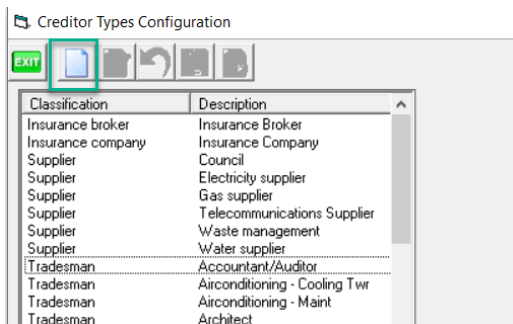- Adding a Creditor Type
- Deleting a Classification or Type

Note: Classifications are complete and not added to.

Adding a Creditor Type

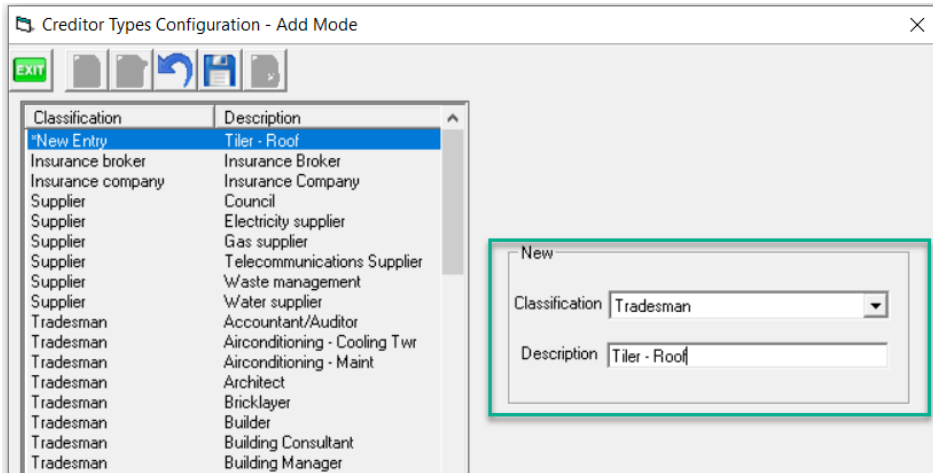1. Navigate to Configure > Creditor Types.

2. Click the Add button to open the Creditor Types Classification screen.

3. In the extended screen, select a classification.

A type must be listed as 'Tradesman' for it to appear in the drop down box on the creditors screen.
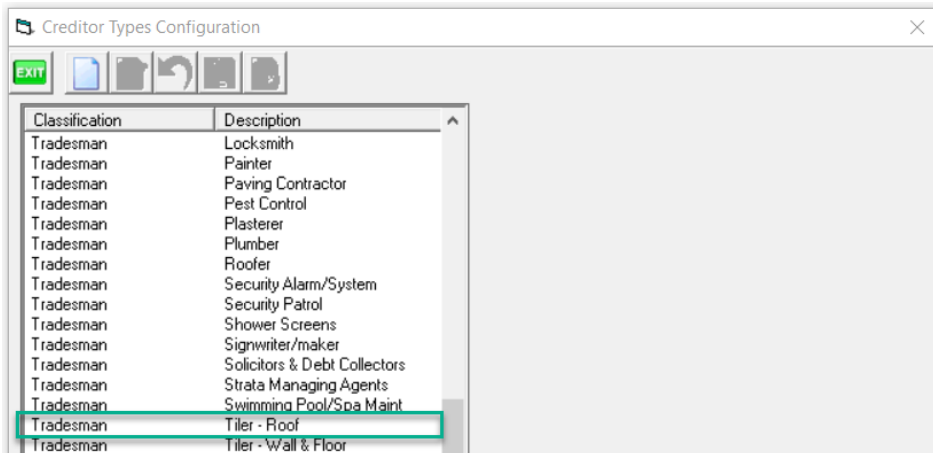
A Credit Collection Agency is also a 'Tradesman' classification, as is an Insurance Company, when you wish to select from a creditor drop down list. In the screenshot below, any creditors selected as insurance brokers in this list will not appear in most creditor drop down lists.
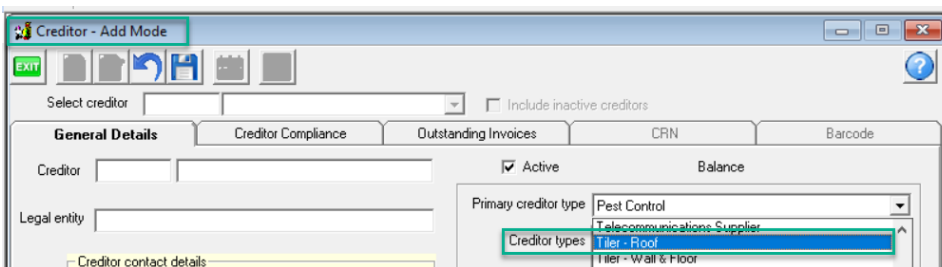

4. Click the Save button.

5. Check that the new entry is showing alphabetically.

The new entry will then appear in the creditor drop down list in the **Manage > Creditors** screen.

6. Continue to add the creditor card as required.
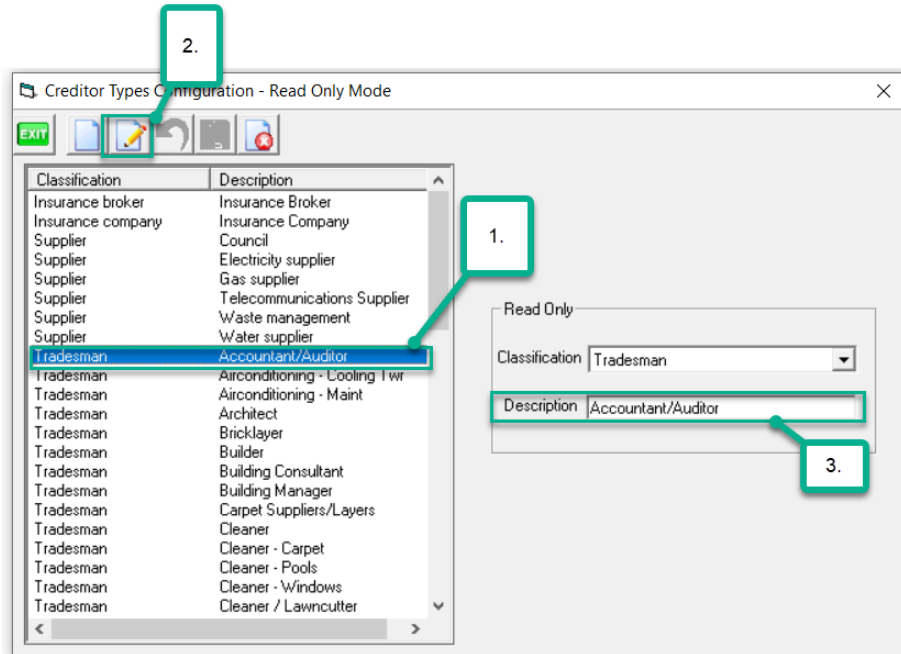
Deleting a Classification or Type

Classification

The classifications are neither added to nor deleted.

Type

While it is possible to edit a creditor type entry, once a creditor type has been added and then linked to a transaction/history through the creditor card, the 'type' cannot be deleted. Strata Master will not allow the deletion. Care should be taken in adding any new creditor type. If a mistake is made, it may be possible to delete if done as soon as possible after entry.

Below are the step to edit a creditor type.

1. Highlight the item to be edited.

2. Click Edit button.

3. Edit the description.

06/01/2025 6:26 pm AEDT