

# Debtor (Second Debtor)

Last Modified on 03/07/2025 9:35 am AEST



The instructions in this article relate to **Debtor (Second Debtor)**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

The **Debtor (Second Debtor)** will provide a facility for any billing to parties external to the property. An example of when to use Second Debtors for billing may be for storage spaces or common property rented to tenants or other entities.

Second Debtor accounts are not included in any Levy Arrears processes as charges to Second Debtors are typically Invoices. However, they can be included in the Arrears Manager to identify any overdue accounts. This is only for reporting.

Second Debtors can be included in reports created from **Local Debtors** and **Global Debtors** icons by adding Fields Debtor Name, Lot Number, Account Code.

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## Secondary Debtor Setup

This setup is no longer required. For instructions on how to check this account code via [Account Maintenance](#).

## Add a Second Debtor

1. Open the **Debtor (Second Debtor)**.
2. Click the *Add New* button to create a new contact.

The screenshot shows a software window titled "Secondary Debtor Maintenance". At the top is a search bar. Below it, three contact entries are listed, each with a unique ID (03100001, 03100004, 03100005) and edit/delete icons. The first contact is Jacquiline Lefevre, the second is Christopher Struan Cooper, and the third is Sascha Cooper. Each entry has a name, a person icon, and some blurred fields. The third entry, for "COMPACT BUSINESS SYSTEMS AUSTR", includes a building icon. At the bottom, there's a status bar showing "Count: 3" and four buttons: "Log", "Add From Owner", "Add New" (highlighted with a red box), and "Close".

3. Click *Add Contact*. From the list of existing contacts, search or click *Create Contact* to create a new contact.
4. Enter details for the Second Debtor as required, noting that the type can be set for Individual or Company. Entering an Email Address will allow the contact to have delivery preferences set to email.
5. Click *Save* once complete.

## Add a Second Debtor - Add From Owner

1. Open the **Debtor (Second Debtor)**.
2. Click the *Add From Owner* button.
3. Select the owner from the owner list of accounts. If this lot is owned by multiple contacts, each contact will be included.
4. If only one second debtor contact is required, click the delete option for the non-required debtor. If both are needed, click the pencil icon to edit the Second Debtor area and enter a combined Address Title (1) and (2).
5. The Lot and Unit Number fields will pre-populate based on the **Roll** information.

# Invoice Entry & Invoice Printing (Second Debtor)

Refer to the article [here](#) for further instructions.

## Delete a Second Debtor

To delete a secondary debtor, the account must have no financial activity - in either the current or old year. If attempting to delete a record with transactions, there will be a prompt to confirm that this record cannot be deleted. This can be checked using **Local Transactions** with the debtor code or description for current and old year if needed. For records that are available to delete, the below can be applied.

1. Search or select **Debtor (Second Debtor)**.
2. Click the red *Delete* cross icon.
3. When prompted, 'Are you sure you want to delete this account?' click *OK*.
4. Click *Close*.

## Add a Note to Second Debtor

1. Search or select **Debtor (Second Debtor)**.
2. Search for the debtor record required and click the *Pencil* icon to edit the record.
3. Click *Notes*.
4. Click *Add* to add to a note or *Edit* to edit an existing note. You can also *Delete* notes where required.
5. Click the *Save* icon.

**NOTE:** Images are not permitted to be saved.

## Second Debtor Invoicing - Due Date

Refer to the article on [Setting Default Days to Pay](#). This will also control the below area when changing the original invoice due date if needed.

## Second Debtors Invoicing - Change Invoice Due Date

This process will update the original due date entered and allow it to be changed based on the [Set Pay Days](#) configuration. Once the due date has been changed, the invoice can be reprinted with the updated due date for the debtor.

1. Search or select **Invoice Printing (Second Debtors)**.
2. Select *Options* and *Change Due Date for Existing Invoices*.

3. Locate the transactions by debtor number from the table of records. If more than one invoice needs to be included, you can multi-select by clicking the first record, holding the shift key, and selecting further records. Note the invoice number, as this will be used to reprint.
4. Click *OK*.

Select Records for Due Date Change

Days for Payment: 10

| Batch No | Date     | Account  | Amount | Invoice Code | Details            | Reference  | Due Date   |
|----------|----------|----------|--------|--------------|--------------------|------------|------------|
| 312      | 13/03/24 | 02100017 | 33.00  | 18           | Arrears Notice Fee | M0000003 X | 13/03/2024 |
| 392      | 08/04/24 | 02100017 | -33.00 | 18           | Arrears Notice Fee | M0000003 Y | 8/04/2024  |
| 313      | 13/03/24 | 02100029 | 33.00  | 18           | Arrears Notice Fee | M0000004   | 13/03/2024 |
| 314      | 13/03/24 | 02100030 | 33.00  | 18           | Arrears Notice Fee | M0000005 X | 13/03/2024 |
| 331      | 18/03/24 | 02100030 | -33.00 | 18           | Arrears Notice Fee | M0000005 Y | 18/03/2024 |
| 315      | 13/03/24 | 02100033 | 33.00  | 18           | Arrears Notice Fee | M0000006   | 13/03/2024 |
| 316      | 13/03/24 | 02100035 | 33.00  | 18           | Arrears Notice Fee | M0000007   | 13/03/2024 |
| 317      | 13/03/24 | 02100037 | 33.00  | 18           | Arrears Notice Fee | M0000008   | 13/03/2024 |
| 318      | 13/03/24 | 02100045 | 33.00  | 18           | Arrears Notice Fee | M0000009   | 13/03/2024 |
| 319      | 13/03/24 | 02100048 | 33.00  | 18           | Arrears Notice Fee | M0000010 X | 13/03/2024 |
| 405      | 08/04/24 | 02100048 | -33.00 | 18           | Arrears Notice Fee | M0000010 Y | 8/04/2024  |
| 424      | 23/04/24 | 03100001 | 35.00  | 18           | Inspection Fees    | M0000011   | 7/05/2024  |
| 435      | 21/05/24 | 03100004 | 25.00  | 18           | Change Due Date    | M0000012   | 31/05/2024 |



OK Cancel

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5. When the message 'The Due Date in selected records will be changed. OK?' appears, click *Yes*.
6. Click *Close*.
7. Then, reprint the invoices selected in the *Conditions* tab in the 'Invoice Number Range', ensuring that the correct Invoice Number Start reference is entered, e.g., *M0000012*. If multiple invoice numbers were changed, include a *Finish* invoice number.
8. Click *Proceed* to resend, and if the contact includes an email address and the *Email* configuration is set, when clicking the print icon from preview, it will send this by email.

Invoice Print - Secondary Debtors 20 May 2024

File Options Goto Tools Help

☒ Screen 
☐ Printer 

Template invbc0 Invoice - 2nd DEPOSIT ...  
 Printer Microsoft Print to PDF ...  
 Paper Source Automatically Select Copies 1  
 Letterhead Default

☒ Deposit Reference

**Building Details**  
 Regulation Module CTS No Type Plan Number  
 Standard 18651 B.F.P. 70285

Select Lots Message Conditions

Report Order  
☒ Account Number  
☐ Alphabetical

Report Period  
☐ Month to Date  
☒ Year to Date

Item Order  
 Reference

Invoice Number Range  
 Start M0000012  
 Finish

Due Date and Pay Amount  
 14 days from invoice date  
☐ Show Nil if Paid  
☐ Show Brought Forward

GST  
☐ Print Non-Taxed Invoice

☐ Update Due Date ☒ Email

Change Building  
 Proceed  
 Close  
 Set as Default

## Reporting Debtors (Second Debtors)

See the [Debtors List](#) and [Secondary Debtors List](#) article to report these contacts. Second Debtors can also be included in reports created from [Local and Global Debtors](#) icons by adding fields **Debtor Name**, **Lot Number**, **Account Code**.