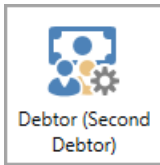


# Debtor (Second Debtor)

Last Modified on 08/07/2024 9:10 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.

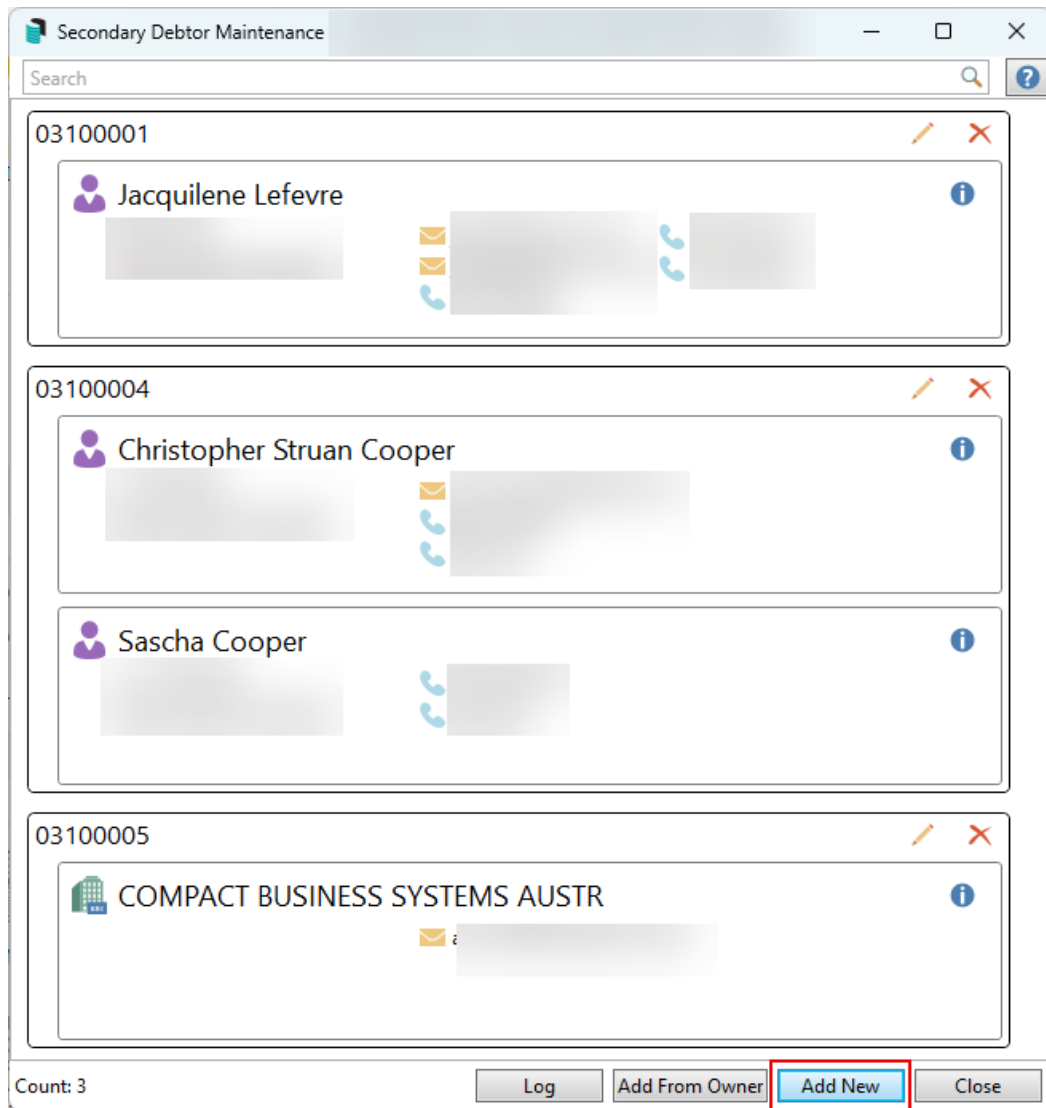
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## Secondary Debtor Setup

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.



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*.

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

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OK Cancel

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: Standard CTS No: 18651 Type: B.F.P. Plan Number: 70285

Select Lots Message **Conditions**

Report Order:
   
 Account Number
   
 Alphabetical

Item Order:
   
 Reference

**Invoice Number Range**
  
 Start: M0000012
   
 Finish:

Report Period:
   
 Month to Date
   
 Year to Date

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.