

Roll | Data Links

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In certain scenarios, data links should be used to support Roll data. These links connect sub-group accounts to their corresponding accounts in the main building, or—in the case of multi-OC (VIC) buildings—via a designated main contact link.

Considerations for Data Links using contacts:

- **Contact Management** should be used to clean contacts, removing duplicates so a single contact card can be used to manage **Roll** data.
- Roll Address and contact details will not update for linked lots if separate contact cards are used between the linked lots.
- Remove Data Links from buildings where the Ownership is the same contact card.
- Only consider Data Links when completing a Sub-Group or Multi OC (VIC) setup.
- Contact Preferences will not update across linked roll lots and must be managed individually.
- Do not link lot accounts if they are not owned by the same person.

Data Links Flags

The Lot account will flag as below to confirm that the **Roll** data is linked.

The screenshot shows a web application window titled "Roll - OCEANCIA 250122". The interface includes a menu bar with "File", "Go To", "Reports", and "Special". Below the menu, there are input fields for "Lot:" (containing "02100002 Multiple 1 & Mutiple 2 Owner"), "# Lots: 35", and "Building:" (containing "OCEANCIA 250122"). A "Lot" section is visible, containing a table with the following data:

Lot: 2	Unit: 2	Plan: 220125	Entitlements 50.0000	Lot Address: 2/Location (1), Location (2), Location (3)
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Below the table, a yellow box contains the word "Linked". At the bottom of the "Lot" section, there are fields for "Account Balance: 11250.00", "Admin Paid To: 31/12/21", "Sink Paid To: 31/12/21", and "Interest Debit Date:". A red square with yellow writing "Linked" is visible next to the "Lot Address" field.

In **Owner Info**, a **Linked** icon (red square with yellow writing) will appear next to the **Full Name** field.

Owner Information STRATAMAX ONLINE HELP 11 06th August 2020

File Options Help

Account Code 02100020 Reference Name T Collins Change Building

Full Name **Linked** Contact Home: Account Status
 T Collins Business: 0434 977 587 Account Balance: 4066.69
 Lot No: 21 Unit No: 21 Car Space: Mobile: 31/03/19
 Sinking Paid to: 30/06/19

Debtor Maintenance, in the Sub-Group, when a debtor has been linked to the main Roll, it will be flagged as below.

Debtor Maintenance - 38 RIV

Search

02100001

(NSA) PAUL JULIE

1/ 38 RIV
Robina,

Linked to another lot

Count: 43 Log Data Links Add New Close

Data Link Fields

The following information is updated when a change of details is actioned for a linked lot.

- Date of receipt of notice.
- Date Acquired.
- Car Space.
- Storage Space.
- Is Owner Occupied Flag.
- Roll Notes field.
- Comments.
- Linked Document.
- Updating of Contact Card Details (only to debtors, as owners should be using the same contact card).
- Adding any additional roll-type contacts.
- Correspondence Preference for Corro and or levies to be sent to an Agent, Mortgagee or Other.
- Advertising OK.
- Send Notice and Send Minutes of Committee Meeting.

Changing Ownership and Data Links

If there is a data link between two or more lot accounts and one of these lots is now owned in a different name, the newly acquired lot account should be unlinked to allow the new ownership to apply. If there is a subgroup within the building and the billing is applied to owners, consider this before unlinking the accounts. The yellow warning 'linked' is displayed in the **Lot** area when data is linked to another account.

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click **OK**.
2. In the Roll screen, click *Change Ownership* button.
3. Refer to the existing contact information and from the Action drop down, make a selection.
 - **Ignore:** Keep the data link in place.
 - **Remove Link:** Remove the data link.
 - **Apply Change:** Applies the new owner details to the linked account once the change is processed (recommended).
4. Click Next to begin the change of ownership process.

The screenshot shows a window titled "Roll Change of Ownership". Inside, there's a section labeled "Data Links" with a question: "These are Data Links for this lot. Do you want these to be stay linked and change ownership to the new owner?". Below this, there are two entries for "OCEANCIA 250122" and "OCEANCIA E250122", both with "Account: 02100015 Jess Developer". The second entry is highlighted with a red border. Its "Action:" dropdown menu is open, showing three options: "Ignore", "Remove Link", and "Apply Change". At the bottom right of the window are three buttons: "Back", "Next", and "Cancel".

Add a single Data Link

1. Search or select **Roll** and select the lot from the lot selection screen.
2. Click the *Data Links* button at the bottom of the Roll screen.
3. Within the 'Data Links' window, click the *Add* button in the bottom right.
4. In the 'Building Selection' screen, locate and select the building, and click *Select*.
 - If linking to a Sub-Group building, expand the Filters and use the 'Sub-Group' drop-down to select the required type.

Building Selection

BCMax Buildings Recent Buildings Name / Number: E

Filters Utilities Buildings

Sub-Group: Utilities

Inactive/Lost: ☒ Active ☐ Inactive/Lost

State:

Financial End Month:

Account Manager:

Management Office:

GST Registered: ☐ Yes ☐ No

Invoice Hub: ☐ Yes ☐ No

Account Groups: ☐ Yes ☐ No

Number	Name	Year Start	Year End	Account Manager
E3	38	01/04/2023	31/03/2024	
E2	CA	01/02/2023	31/01/2024	
E1	DE	01/07/2023	30/06/2024	
E5	GL	01/01/2022	31/12/2022	
E9	JES	01/08/2023	31/07/2024	
E3	MA	01/04/2021	31/03/2022	

Select Base Building Select Master Chart Building

Count: 6

Select Cancel

- In the 'Account Code List' screen, tag the lot/s that need to be linked, then click **OK**. If the names are different, a warning prompt will appear. Click **OK** if ready to link.

Add data link

Warning:
For link to account 02100001 the account name doesn't match
(NSA) PAUL I. [REDACTED], JULIE [REDACTED] vs ORIGINAL OWNER)

OK Cancel

- Any selected lots will now appear in the 'Data Links' screen.
- Click **Close**, and in the **Roll** screen there will be a yellow notification in the 'Lot' section saying 'Linked'.

View Data Links

This displays any existing data links within the building.

- Search or select **Roll** and select any lot in the lot selection screen.
- Click the **Data Links** button at the bottom of the **Roll** screen.
- In the 'Data Links' window, tick the **Show All** box.
- Any existing links in the building will now be displayed in the screen.

Data Links

Selected Account Code: 02100002 ORIGINAL OWNER

☒ Show All

	Building Number	Building Name	Group	Account Code	Description	Lot	Unit	
★	399	38 RIV	E	02100001	ORIG	1	1	
	E39	38 RIV	Utilities	02100001	(NSA	ANNE 1	1	
★	399	38 RIV	E	02100002	ORIG	2	2	
	E39	38 RIV	Utilities	02100003	FILM	3	3	

Remove Data Links

This should be done prior to processing a [Change of Ownership](#) on a lot that is part of a link. It can also be completed as a separate action with the below steps where required.

1. Search or select [Roll](#), and in the lot selections screen, select the lot and click *OK*.
2. Click the *Data Links* at the bottom of the [Roll](#) screen.
3. In the 'Data Links' window, the existing linked lots will be displayed with the 'Master' link in the *Main* building at the top, noted with a yellow star in the left hand column. This cannot be deleted and only lots beneath this one can be.
4. Click the *Delete* (red 'X') button next to the required linked lot.

Data Links

Selected Account Code: 02100001 ORIGINAL OWNER

☐ Show All

	Building Number	Building Name	Group	Account Code	Description	Lot	Unit	
★	39917	38 RIVERWALK AVENUE		02100001	ORIGINAL OWNER	1	1	
	E39917	38 RIVERWALK AVENUE	Utilities	02100001	(NSA) PAUL BANJAC, JULIE ANNE	1	1	

5. Click *Yes* when prompted.
6. Click *Close* to close the 'Data Links' screen.

Data Links Between Records in Main Roll

Any established data links from a main group to another property's main group should be replaced using the contact card methodology. First, identify which properties and lots have been linked.

1. Unlink the [Roll data](#) as per the steps above.

2. Ensure the same contact card is used on both lots (so that the same owner information is maintained across any lots that this contact card is selected for).
3. Review the delivery preferences and any agents / other contact types on each, as they are set individually per lot account.