Roll Data Links

Last Modified on 16/07/2025 4:04 pm AEST

With individual contact cards now existing, there are few instances in which data links should be considered for linking Roll data. Data links are used to connect any sub-group accounts to corresponding accounts in the main building OR for a multi OC (VIC) type building via a main contact link. This ensures that any owner name and address details are updated in the sub-group (water, air-conditioning, electricity or by-laws) at the same time as they are updated in the main building, or the same Roll information across buildings.

Considerations for Data Links using contacts:

- *Contact Management* should be used to clean contacts to ensure that duplicate contacts are removed, allowing the one contact card to be used for managing *Roll* data.
- Roll Address and contact details will not update for linked lots if separate contact cards are used between the linked lots.
- Removing Data Links from buildings where the Ownership is the same contact card should be actioned.
- Only consider Data Links when completing a Sub-Group or Multi OC (VIC) setup.
- Contact Preferences will not update across linked roll lots, and are available to manage on an individual basis.
- Do not link lot accounts if they are not owned by the same person.

Data Links Flags

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

📄 Ro	oll - OCI	EANCIA 25012	2					_		×
<u>F</u> ile	<u>G</u> o To	<u>R</u> eports	<u>S</u> pecial							
Lot:	02100	002 Multiple	& Mutiple 2 Owner	🔺 🕨	# Lots: 35	Building:	OCEANCIA	250	122 -	0
Lot										<u>^</u>
	ſ	Lot: 2 Unit:	2 Plan: 220125 Entitlem	ents 50.0000 l	Lot Address: 2/l	Location (1), Lo	cation (2), Locatio	n (3)		
		Linked								
		Account Bala Interest Debit	nce: 11250.00 Admin Pai Date:	d To: 31/12/21	Sink Paid To: 3	31/12/21		0		

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

Owner Information STRATAMAX ONLINE HE	ELP 11 06th August 2020	– 🗆 X
File Options Help		
Account Code 02100020 Reference Name	T Collins	Change Building
	Contact	Account Status
Full Name	Contact Home:	Account Status Account Balance: 4066.69
Full Name Linked	Contact Home: Business:	Account Status Account Balance: 4066.69 Admin Paid to: 31/03/19
Full Name Linked T Collins Lot No: 21 Unit No: 21 Car Space:	Contact Home: Business: Mobile: 0434 977 587	Account Status Account Balance: 4066.69 Admin Paid to: 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 like the below.

Debtor Maintenance - 38 RIV	man, server		_		\times
Search				Q	0
02100001			8	/ X	Ĵ
S (NSA) PAUL JULIE 1/ 38 Rin Robina,	NE	Linked to a	nother lot	0	
<					> >
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 of 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 sub group within the building and the billing is applied to owners, this should be considered first before unlinking the accounts. The yellow warning 'linked' is displayed in the *Lot* area when data linked to another account.

- 1. Search or select *Roll*. In the Account Code List, select the relevant lot and clickOK.
- 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.

Roll Change of Ownership	_		Х
Data Links			0
These are Data Links for this lot. Do you want these to be stay linked and change ownership to the new owner?			
Account: 02100015 Jess Developer			
OCEANCIA E250122 Account: 02100015 Jess Developer Action: Remove Link Ignore Remove Link Apply Change			
Back	lext	Can	cel

Add a single Data Link

- 1. Search or select $\it Roll$ 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 Sele	ction				- 0	×
BCMax Building	gs Recent Buildings		Nar	me / Number: E		
Filters	Utilities Buildings					
Sub-Group:	Utilities 🔹	× Accor	unt Manager:		• 🔒 🗙	
Inactive/Lost:	Active Inactive/Lost	Mana	gement Offic	e:	- 🔒 🗙	
State:	-	🗙 GST F	Registered:	○ Yes ○ No	×	
Financial End N	Aonth:	× Invoid	e Hub:	🔿 Yes 🔿 No	×	
		Acco	unt Groups:	○ Yes ○ No	×	
A 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	AM	01/04/2021	31/03/2022	COLUMN TWO IS NOT		
Select Base Build	ing Select Master Chart Building				Co	ount: 6
				Select	Cance	el

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

Add data I	ink	×
	Warning: For link to account 02100001 the account name doesn't match ((NSA) PAUL (, JULIE vs ORIGINAL OWNER)	
	OK Cancel	

- 6. Any selected lots will now appear in the 'Data Links' screen.
- 7. 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.

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

ele	ected Account Code	02100002 ORIGINA	L OWN	IER				🗸	Show All
	Building Number	Building Name	G	roup	Account Code	Description	Lot	Unit	
k	399	38 RIV	E		02100001	ORIG	1	1	$\boldsymbol{\times}$
	E39	38 RIV	E Ut	tilities	02100001	(NSA ANN	E 1	1	$\boldsymbol{\times}$
k	399	38 RIV	E		02100002	ORIG	2	2	×
	E39	38 RIV	E Ut	tilities	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.

	1	Data Links							_]	×
s	ele	ected Account Code	02100001 ORIGINAL OV	WNER					[_ Sho	w All	0
		Building Number	Building Name	Group	Account Code	Description	Lot	Unit				
7	k	39917	38 RIVERWALK AVENUE		02100001	ORIGINAL OWNER	1	1	×			
		E39917	38 RIVERWALK AVENUE	Utilities	02100001	(NSA) PAUL BANJAC, JULIE ANNE	1	1	\mathbf{X}	4		
									45			
									Add		Close	
									Aud		Close	

- 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 that have been linked.

1. Unlink the *Roll data* as per the steps above.

- 2. Ensure 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.