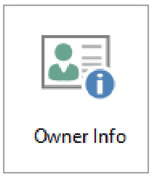
Owner Info

Last Modified on 23/06/2026 9:56 am AEST

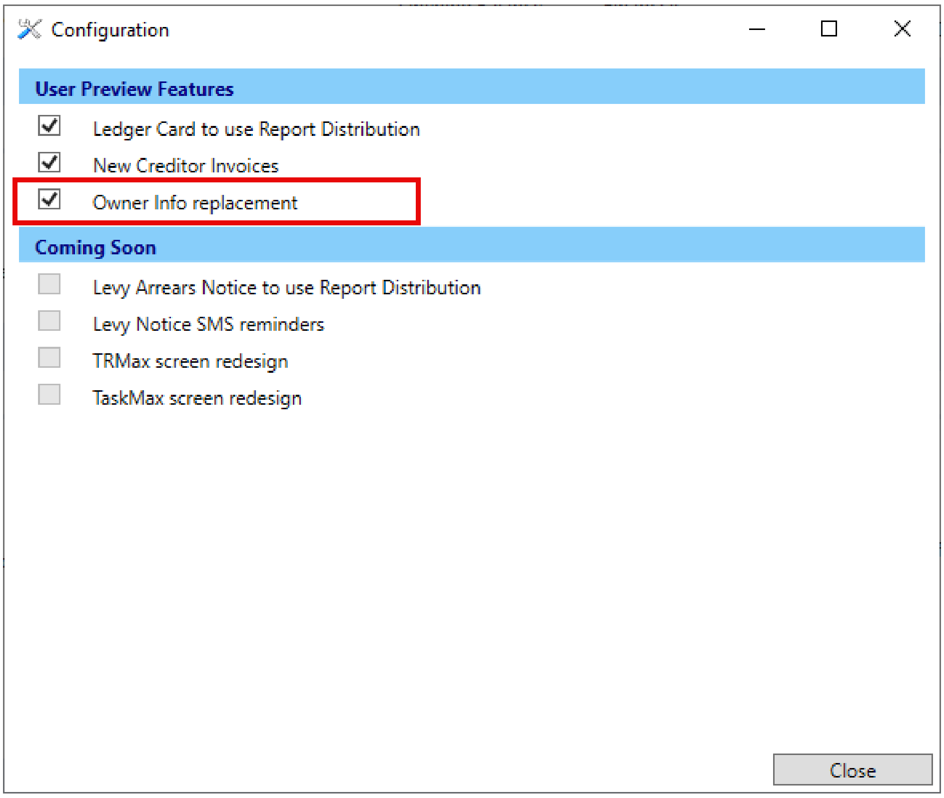


The instructions in this article relate to ***Owner Info.*** The icon may be located on the *StrataMax Desktop* or found using the *StrataMax Search*.

This article applies to StrataMax version 5.6.154 and above. Refer to the ***Legacy Owner Info*** section below for prior versions.

Owner Info | Preview Features

If access to ***Preview Features in Security Setup*** has been enabled, this screen can be toggled between the legacy and new versions.



Owner Info | Overview

This section provides an overview of the ***Owner Info*** screen, covering each section with a red header. This screen allows quick access to a lot of the common information that is useful for a Strata Manager to know at a glance.

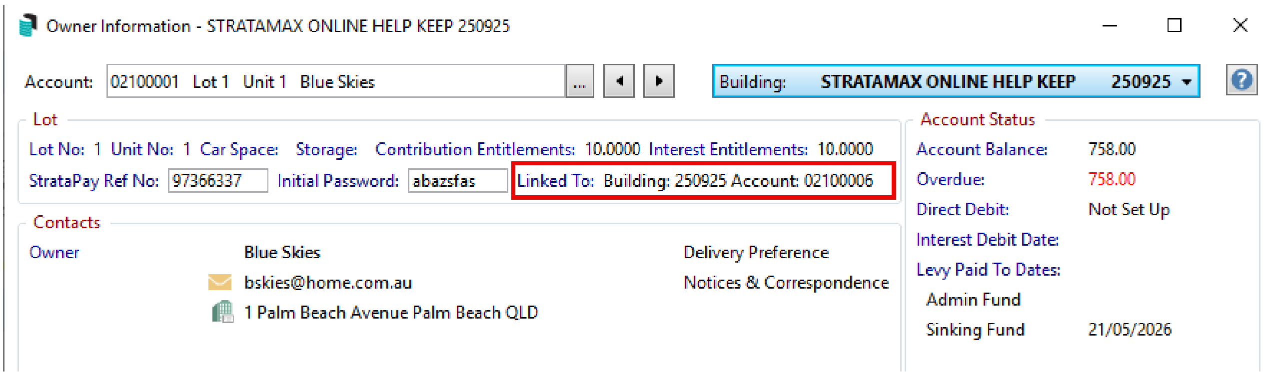
When the Owner Info screen is initially opened, it defaults to displaying the first lot in the building. Use the ellipsis button to open the lot selector window to select a different lot or use the arrow buttons to toggle between the lots.

Use the Building Selector drop-down to select a different building.

Lot

The Lot area contains basic information about the lot.

- Lot, Unit, Car Space, etc.:
- StrataPay Ref No:
- Initial Password:
- Linked To: If there is a ***Data Link*** in place this is noted in the Lot area:



Contacts

Contains the details of the contacts associated with the lot, including tenants, agents, etc.

Report Settings

Report Settings for the selected lot can be adjusted here and saved for future reporting.

Owner Info Ledger Only: Print a summary of owner information along with the ledger of the lot. There are also selections in the Linked Account Option drop-down menu:

- Report only Main Group: Shows information for this lot account from the Main Group only.
- Merge records from Sub-Groups: Shows information for this lot and all linked Sub Groups accounts.
- Merge Records from this Group Only:Shows information for this lot and all linked accounts in this

Group only.

- Merge Records from All Linked Groups: Shows information for this lot and all linked accounts in all Groups.

Separate Section for Each Account: It is recommended to tick this box when selecting any of the above options, as it will separate each linked account for easier viewing.

Portal Owner Info Settings

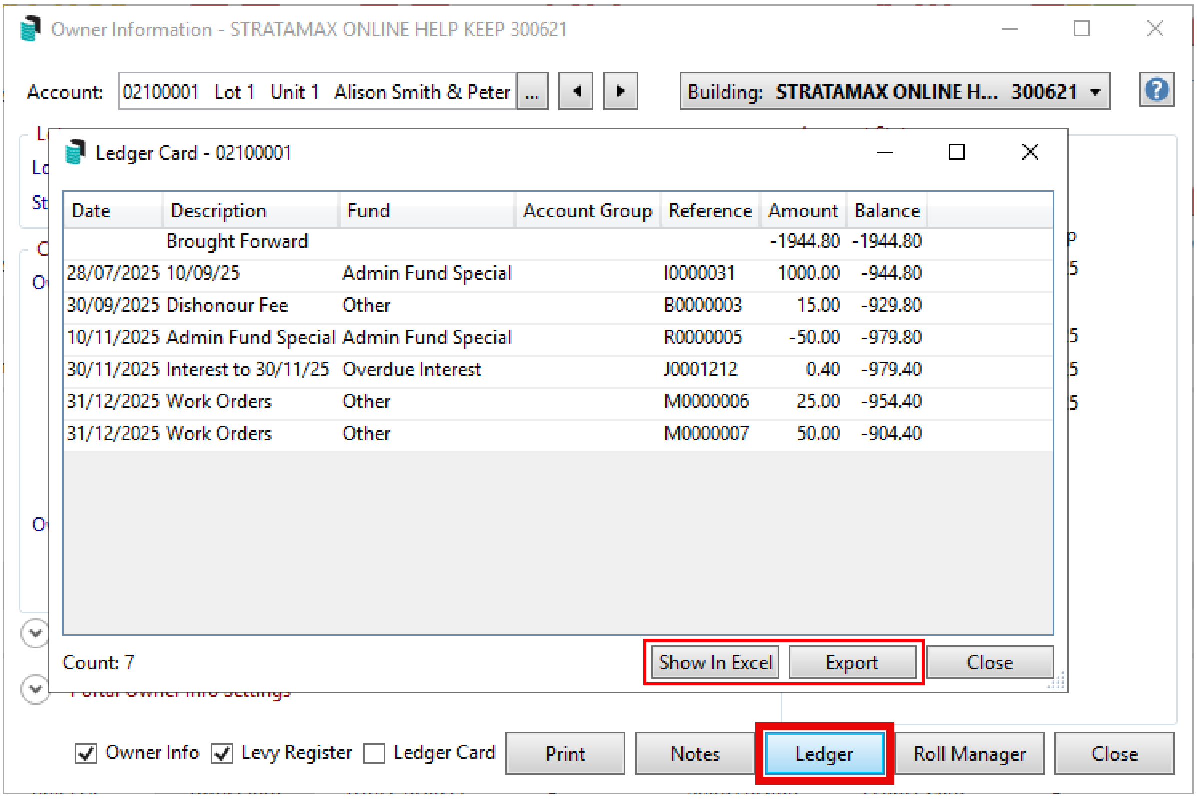
This section is used to format the reports on the *Owner Portal* when the *Owner Reports* are configured and uploaded.

Notes

Open the *Notes* menu for this lot, where existing notes can be viewed, edited, or deleted, and new notes can be added.

Ledger

Opens a basic window with the transactions for the selected lot, for the current year. Click the *Show in Excel* button to open the ledger in Excel or use the *Export* button to export the ledger card data to a .txt. file.



Roll Manager

Opens the ***Roll***.

Print

Review the tick boxes next to *Print* to configure the reports to be printed:

- *Owner Info:* Print both separate reports of the Owner Information display on the screen and the Levy Register for this building.
- *Levy Register:* Print the Levy Register for this building.
- *Ledger Card:* Print the Owner Information report.

Account Status

Account Balance: The overall balance of the lot account, including all funds, interest, and arrears fees.

Admin Paid To: The date that the Admin Fund levy has been paid up until for this lot. Logically, in most cases, the next levy period would start the next day.

Sinking Paid To: The date that the Sinking/Capital Works/Maintenance Fund levy has been paid up until for this lot. Logically, in most cases, the next levy period would start the next day.

Direct Debit: If details appear here, this means the owner has contacted *StrataPay* and initiated their *Direct Debit* facility. The *Strata Manager* will receive a notification email from StrataPay, which will need to be saved (instructions are included on the email) and StrataMax will be updated to reflect Direct Debit details overnight. There are 3 types of *Direct Debits*:

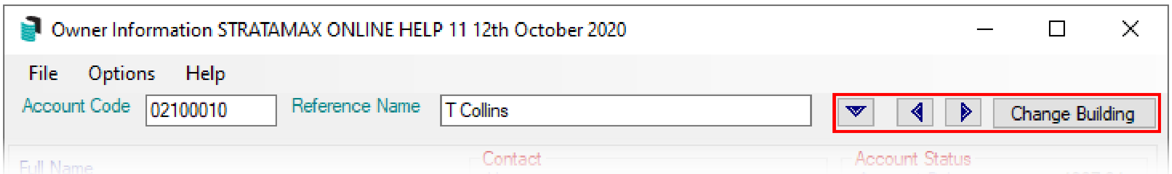
1. Client Initiated - the payers reference number and account details are held on our system; however payments are only made when initiated by the payer. Notification can be made by telephone or internet. We will need to be instructed to make a payment of a set amount, together with any service charges which may apply, on a set date.
2. Fixed - the payer sets a fixed payment amount, together with any service charges which may apply, to be debited from their nominated account either weekly, fortnightly, monthly, quarterly or half yearly intervals beginning on a specified date, and continuing until the finish date specified or until further notice.
3. Auto - any amount due on the payers account as advised by the biller, together with any service charges which may apply, will be drawn from the payers nominated account or credit card up to 5 business days prior to those levies or other charges becoming due on the account.

Interest Debit Date: The last date that interested was debited on this lot account.

Legacy Owner Info

Upon opening ***Owner Info***, the first lot will automatically be selected. Useful information is displayed about a selected lot owner, such as contact info, StrataPay ref no, as well as transaction information - all without having to open separate menus of StrataMax. There is also functionality to access stored reports for the selected lot code, report on linked data and produce owner reports.

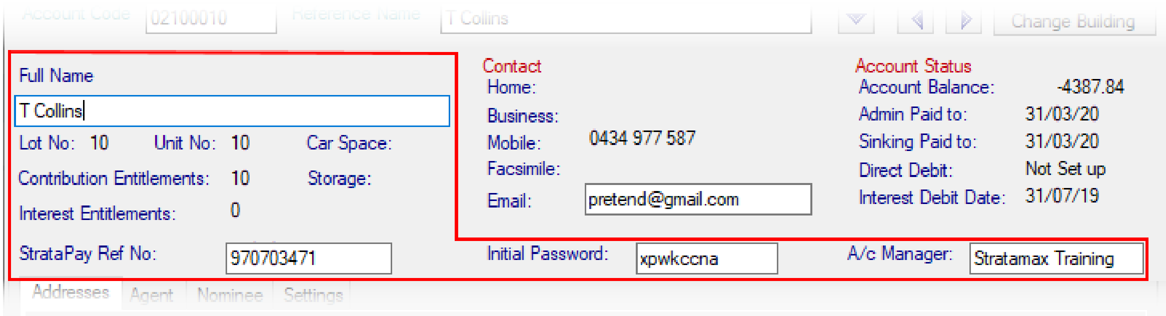
- Click the drop down arrow to display the *Account Code List* window to select a different owner, or use the *left* and *right* arrows to move between lot owners.
- Click the *Change Building* button to select a different building.



- At a glance, information can be accessed from this screen:
  - *Account Status*, *Addresses*, *StrataPay Reference Number*, *Initial Portal Password* and shortcut links to other various areas in StrataMax.

General Info

The top section of ***Owner Info*** contains general information; full name, lot number, unit number, car space number, etc.



Above the *Full Name* field, there may be a series of coloured boxes, which act as tool tips for useful info at a glance:

Ret. Mail 

Please refer to the ***Returned Mail*** article for more info.

Linked 

Displayed when a lot is linked to another lot, either in the same or other building. See the ***Data Links*** article for more info.

Legal 

Displayed when the owner is currently in legal action for unpaid levies. See our Legal Action Process article.

Split 

Displayed when the owner has split levy setup enabled. See the *Split Levy Setup* instructions for more info.

Contact

This section contains the most relevant lot owner contact information. The *Email* field can be highlighted in order to copy it to other applications, such as Outlook. This information stems from and can only be edited in the ***Roll***.

Account Status

Account Balance: Simply the overall balance of the lot account, including all funds, interest, and arrears fees.

Admin Paid To: The date that the Admin Fund levy has been paid up until for this lot. Logically, in most cases, the next levy period would start the next day.

Sinking Paid To: The date that the Sinking/Capital Works/Maintenance Fund levy has been paid up until for this lot. Logically, in most cases, the next levy period would start the next day.

Direct Debit: If details appear here, this means the owner has contacted *StrataPay* and initiated their *Direct Debit* facility. The *Strata Manager* will receive a notification email from StrataPay, which will need to be saved (instructions are included on the email) and StrataMax will be updated to reflect Direct Debit details overnight. There are 3 types of *Direct Debits*:

1. Client Initiated - the payers reference number and account details are held on our system, however payments are only made when initiated by the payer. Notification can be made by telephone or internet. We will need to be instructed to make a payment of a set amount, together with any service charges which may apply, on a set date.
2. Fixed - the payer sets a fixed payment amount, together with any service charges which may apply, to be debited from their nominated account either weekly, fortnightly, monthly, quarterly or half yearly intervals beginning on a specified date, and continuing until the finish date specified or until further notice.
3. Auto - any amount due on the payers account as advised by the biller, together with any service charges which may apply, will be drawn from the payers nominated account or credit card up to 5 business days prior to those levies or other charges becoming due on the account.

Interest Debit Date: The last date that interested was debited on this lot account.

Addresses Tab

Displays all addresses for the owner of the lot, as well as the *Contact Preferences* for *correspondence* and *levy notices.*

Agent Tab

If an agent has been inserted in the ***Roll***, the information will be displayed in this tab. The *Contact Agent* button is also here, which opens the *Contact* dialogue window. There are various buttons to contact the agent, however, the *Fax, Telephone,* and *SMS* functions are disabled by default due to no integration with software phones or faxes being commonplace.

Nominee Tab

Displays the information of any appointed nominees that have been inserted into the *Nominee tab* in the ***Roll***.

Settings Tab

This enables the information from linked accounts to be merged and displayed in the *Ledger Card*. When the *Ledger Card* is displayed, this will also include information from the linked accounts, depending on the settings chosen. Once changed, select 'Options' / Save Settings for StrataMax and 'Print' to screen to have the format changed on the Portal.

Report only Main Group: Shows information for this lot account from the Main Group only.

Merge records from Sub-Groups: Shows information for this lot and all linked Sub Groups accounts.

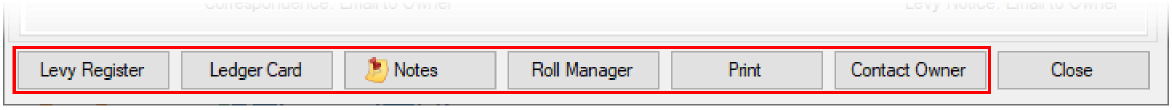
Merge Records from this Group Only: Shows information for this lot and all linked accounts in this Group only.

Merge Records from All Linked Groups: Shows information for this lot and all linked accounts in all Groups.

Separate Section for Each Account: Recommended to include this option when selecting any of the above options. It will separate each linked account to view easily.

Please refer to 'Save Settings for StrataMax' in the Settings below for more information around what this will do with the above and the Owners Portal.

Owner Info Buttons (Bottom of screen)



Levy Register: Displays the lot's levy register in the form of a table.

Ledger Card: Displays the lot owner's ledger in the form of a table, which can be displayed in Excel, or exported as a .txt file.

Notes: Open the *Notes* menu for this lot, where existing notes can be viewed, edited, or deleted, and new notes can be added.

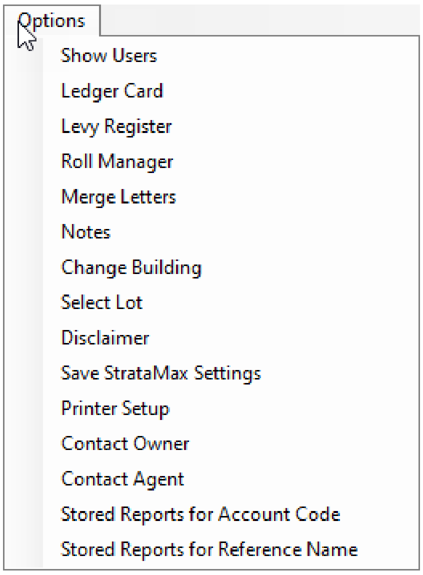
Roll Manager: Opens the ***Roll***.

Print: Presents various report options, which will print a report with the appropriate information.

- *Owner Info and Levy Register:* Print both separate reports of the Owner Information display on the screen and the Levy Register for this building.
- *Owner Info Only:* Print the Owner Information report only.
- *Levy Register Only:* Print the Levy Register for this building only.
- *Owner Info Ledger Only:* Print a summary of the Owner Information along with the ledger of the lot.

Contact Owner: Opens the *Contact* dialogue window where various buttons to contact the owner are available to click. Please note that *Fax, Telephone,* and *SMS* functions are disabled by default due to no integration with software phones or faxes being commonplace.

Owner Info Options Menu



Show Users: Displays the *Security Control* window, with the currently locked buildings.

Ledger Card: Displays the lot owner's ledger in the form of a table, which can be displayed in Excel, or exported as a .txt file.

Levy Register: Displays the lot's levy register in the form of a table.

Roll Manager: Opens the ***Roll***.

Merge Letters: Opens ***Merge Letters***.

Notes: Open the *Notes* menu for this lot, where existing notes can be viewed, edited, or deleted, and new notes can be added.

Change Building: Presents the list of buildings to select from.

Select Lot: Present the list of lot accounts to chose from - the same as clicking the drop-down arrow next to the *Reference Name* field.

Disclaimer (Owner Info Report): Provision has been made available for a disclaimer to be printed in the footer of the Owner Info reports, produced via the *Print* button. The principal reason for this is to accommodate the release of information from StrataMax.

1. Click *Options* > *Disclaimer.*
2. Type in disclaimer text as required. The text will be formatted as a left justified paragraph.
3. Click *OK* when finished to return to ***Owner Info***.

Save StrataMax Settings: This area should be checked when the settings are adjusted to include merged records for ***Ledger Card*** purposes and will assist in having this information available on the *Owner Portal* when the *Owner Reports* are available.

Printer Setup: Displays the *Printer Setup* window, so printer preferences and settings can be configured for the *Owner Info Report*.

Contact Owner: Opens the *Contact* dialogue window where various buttons to contact the owner are available to click. Please note that *Fax, Telephone,* and *SMS* functions are disabled by default due to no integration with software phones or faxes being commonplace.

Contact Agent: Opens the *Contact* dialogue window if an estate agent has been appointed in StrataMax, which will also be preset in the *Agent* tab. There are various buttons to contact the agent, however, note that *Fax, Telephone,* and *SMS* functions are disabled by default due to no integration with software phones or faxes being commonplace.

Stored Reports for Account Code: Opens the Stored Report menu, displaying the entire history of documents and reports that have been produced for this lot, regardless of who the owner is or was.

Stored Reports for Reference Name: Opens the Stored Report menu, displaying the entire history of documents and reports that have been produced only for this owner.