Roll Master Editor

Last Modified on 16/07/2025 4:29 pm AEST

The instructions in this article relate to ***Roll Master Editor.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

The ***Roll Master Editor*** is where both Agent and mortgagee contacts are managed in StrataMax. This article will refer to both as 'contacts' as the instructions remain the same for both.

- The enhanced validation has been designed to reduce duplicate contacts, meaning changes to the title of the contact will be restricted to prevent overwrites and duplications.
- A visible notification is included to alert users when a duplicate email address has been entered.
- A list of lots that currently have their levies and/or correspondence sent to it are displayed.
- The history of changes to the contact details are available.

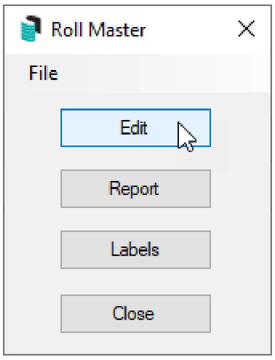
Email Levy Notice and Correspondence to Agent Contacts

The below setting must be configured in order for StrataMax to deliver the correspondence or levy notice to a managing agent.

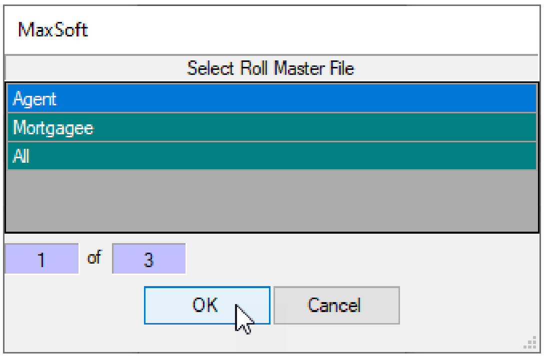
1. Search or select ***Levy Notice/Reports***.
2. Click *File > Configure.*
3. Tick the *Email Levy notice and Correspondence to Global Agent/Mortgagee* box.
4. You can also set *Email copy to owner when Notice Address is used by Global Agent/Mortgagee.*
    - Ticking this global setting will ensure that owners also receive a copy of the correspondence if an agent is in the 'Service of Notice Address' field, or a copy of the levy notice if an agent is in the 'Levy Notice Address' field in the ***Roll*** menu.

Create a New Contact

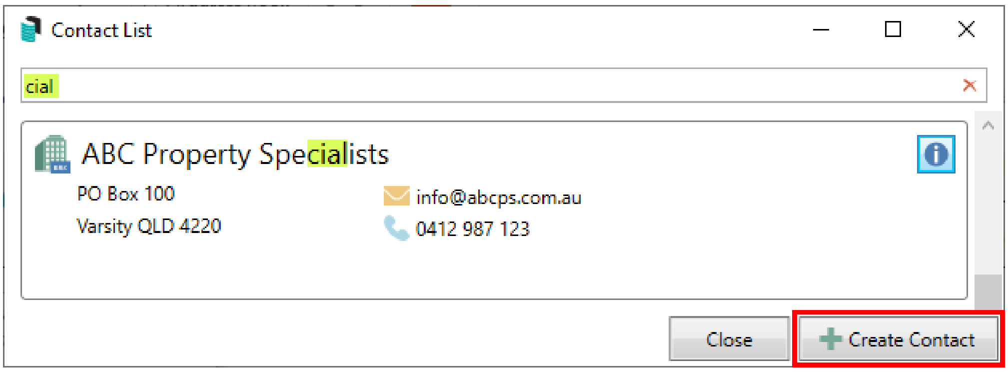
1. Search or select ***Roll Master Editor***, and click the *Edit* button.



2. *Agent* should be selected by default, so click *OK,* and the *Contact List* will appear.



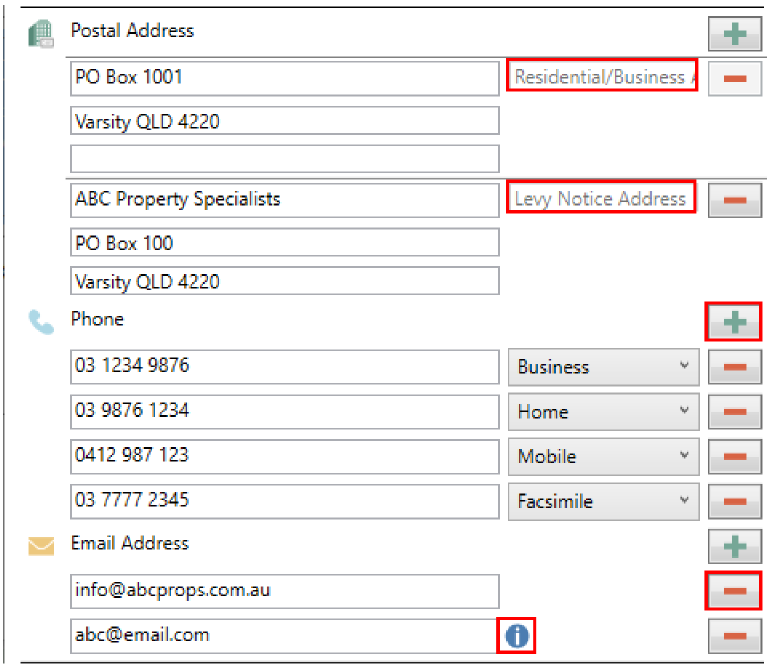
3. To prevent creating duplicate contacts, it is recommended to thoroughly check if a contact already exists before creating a new one. To do this, use the *Search* at the top of the contact list to filter contacts.
   - It will search anywhere in the *Title* field. So typing "cial" will return contacts with the word "Special" in the title, for example.
   - It will search from the beginning of the *Phone* and *Email* fields.
   - Use the red X button in the Search field to clear the field.



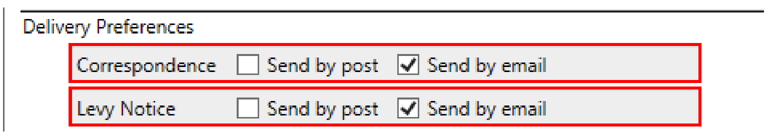
4. Once you have established that there isn't an existing contact, click the *Create Contact* button, and the *Contact Details* window will open.
5. *Title* is required and must be entered in order to save the contact.
6. The *Type* can only be changed if you selected 'All' in step 2. after clicking the *Edit* button.
7. The *Reference Name* field and type the name.
8. Only *Address Title (1)* and *Letter Title* will copy across to the ***Roll,*** and will be used for correspondence and levies if a Residential/Business Address is entered in the *Postal Address*

section.

9. Enter an ABN and/or ACN if required. Both fields are validated.
10. Click the green plus button to add the *Postal Address*, *Phone Number*, and *Email Address.*
    - Up to two different postal addresses can be added:
        - Residential/Business is used in the ***Roll*** for correspondence and levies. Note that when entering a *Postal Address*, only the first two lines will be pushed through to the ***Roll*** record.
        - Service of Notice is used in ***Label Printing***.
    - Additional phone numbers and email addresses can be added by simply clicking the **green plus** button.
    - To delete them, click the **red minus** button.
    - If a duplicate email address is found in another contact, a notification icon will appear.



11. Under the *Delivery Preferences* section, tick the required box to send *Correspondence* and *Levy Notices* via post and/or email.
    - This will be reflected in the ***Roll***.

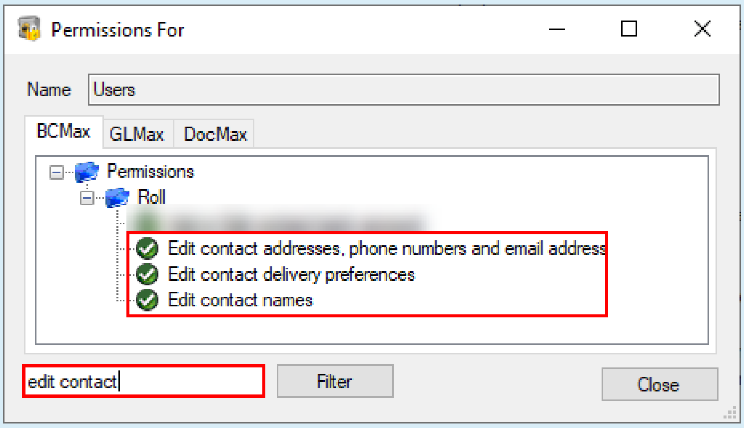


12. Click the *Save* button, then *Close*.

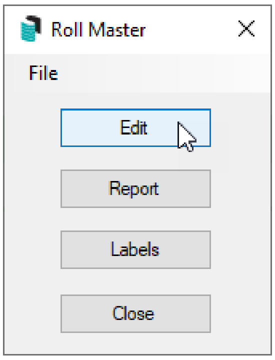
Agents & Mortgagees can only be deleted if they have never been used; this is to maintain all history & log records.

View or Edit a Contact

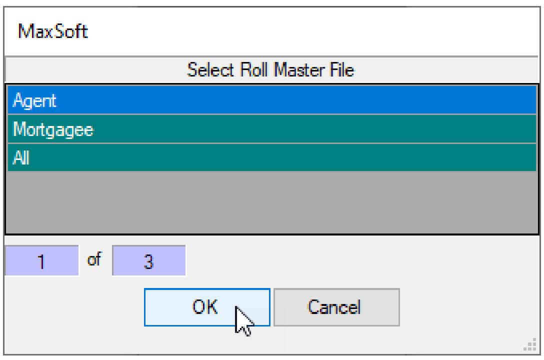
To be able to edit the *Office Bearer Contact Details*, you will need the following 'Edit' permissions under the 'Roll' category in ***Security Setup***.



1. Search or select the ***Roll Master Editor***, and click the *Edit* button.



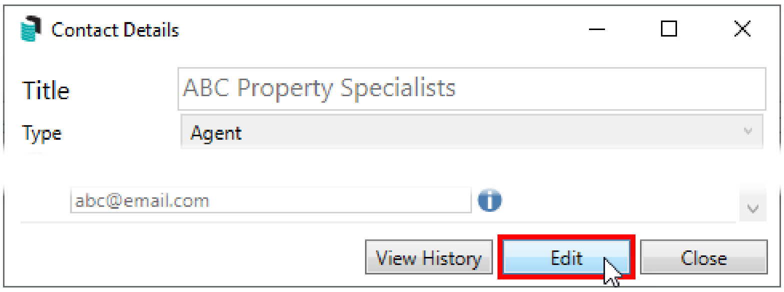
2. *Agent* should be selected by default, so click *OK*, and the *Contact List* will appear.



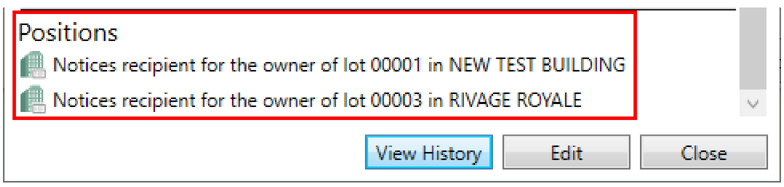
3. Use the *Search* at the top of the contact list to filter contacts.

- It will search <u>anywhere</u> in the *Title* field. So typing "cial" will return contacts with the word "Special" in the title, for example.
- It will search from the <u>beginning</u> of the *Phone* and *Email* fields.
- Use the red X button in the Search field to clear the field.

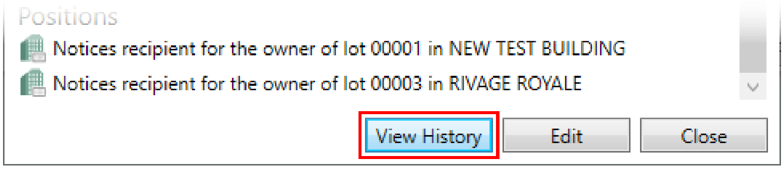
4. Click the blue **Info** button to open the *Contact Details* window.
5. To edit the details, click the *Edit* button.



6. The *Title* can only be edited to a certain point. If more than ten percent of the title is altered, you will be prompted to create a new contact.
7. The *Type* cannot be changed.
8. The *Reference Name* field may be changed freely.
9. Only *Address Title (1)* and *Letter Title* will copy across to the ***Roll,*** and will be used for correspondence and levies if a Residential/Business Address is entered in the *Postal Address* section.
10. Click the green plus button to add the *Postal Address*, *Phone Number*, and *Email Address.*
    - Up to two different postal addresses can be added:
        - Residential/Business is used in the ***Roll*** for correspondence and levies. Note that when entering a *Postal* address, only the first two lines will be pushed through to the ***Roll*** record.
        - Service of Notice is used in ***Label Printing***.
    - Additional phone numbers and email addresses can be added by simply clicking the **green plus** button.
    - To delete them, click the **red minus** button.
    - If a duplicate email address is found in another contact, a notification icon will appear.
11. Review the *Positions* section at the bottom of the *Contact Details* screen to see which lots are managed by this agent and will be affected by any changes.



12. Click the *View History* button to open the *Contact Edit History* screen, containing details of all changes made.



13. Once all necessary changes have been made, click the *Save* button, which will automatically apply any changes to any linked lots.

Delete a Contact

If an agent / mortgagee has been removed from the roll record and is no longer referenced, please see this article for instructions on how to complete this process.

Report Agents

Reports on both agents and mortgagees are available within the ***Roll Master Editor***. This will report the contact details recorded for the selected type.

1. Search or select ***Roll Master Editor*** and click the *Report* button.
2. Select either the *Agents* or *Mortgagees* button.
3. Set print options as preferred, and click *OK.*

If you would like to see which lots are managed by a particular agent across the entire portfolio, check the *Positions* section at the bottom of the *Contact Details* screen.

Labels for Agents

1. Search or select ***Roll Master Editor*** and click the *Labels* button.
2. Select either the *Agents* or *Mortgagees* button.
3. Tag the agents / mortgagees required and click *OK.*
4. In the ***Label Printing*** screen, change any options as required, then click *Print.*