

# Roll Master Editor

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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.

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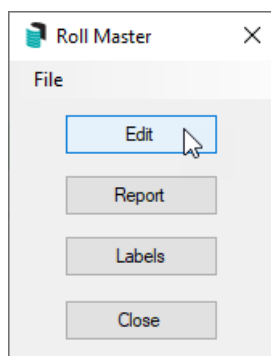
## Email Levy Notice and Correspondence to Agent Contacts

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

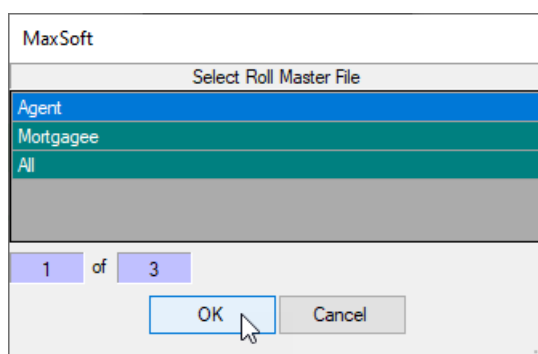
1. Search or select **Levy Notice/Reports**.
2. Click *File > Configure*.
3. Tick the *Email Levy notice and Correspondence to Global Agent/Mortgagee* box.
4. You can also set *Email copy to owner when Notice Address is used by Global Agent/Mortgagee*.
  - Ticking this global setting will ensure that 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.

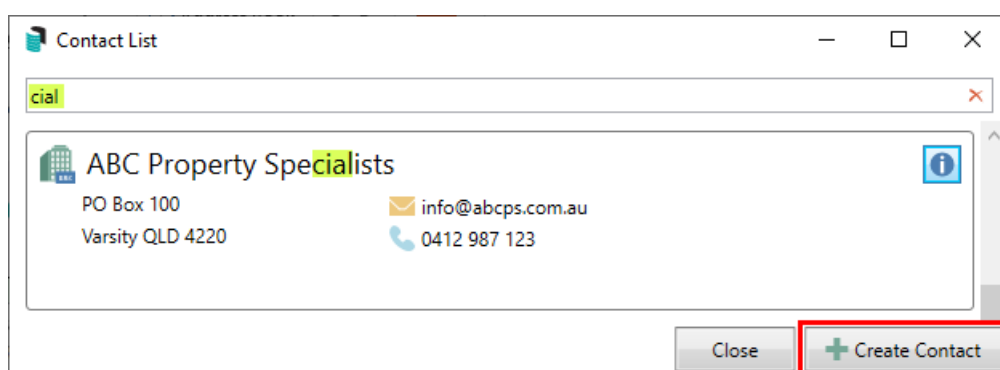


2. *Agent* should be selected by default, so click *OK*, and the *Contact List* will appear.



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 "Specialists" 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.

The screenshot shows a contact form with the following sections:

- Postal Address:** Contains two address entries. The first entry has 'PO Box 1001' and 'Varsity QLD 4220' with a dropdown menu set to 'Residential/Business'. The second entry has 'ABC Property Specialists', 'PO Box 100', and 'Varsity QLD 4220' with a dropdown menu set to 'Levy Notice Address'. Each entry has a green plus button to add and a red minus button to delete.
- Phone:** Contains four phone number entries with dropdown menus for 'Business', 'Home', 'Mobile', and 'Facsimile'. Each entry has a green plus button to add and a red minus button to delete.
- Email Address:** Contains two email address entries: 'info@abcprops.com.au' and 'abc@email.com'. The second entry has a blue information icon (i) next to it. Each entry has a green plus button to add and a red minus button to delete.

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**.

The screenshot shows the 'Delivery Preferences' section with the following settings:

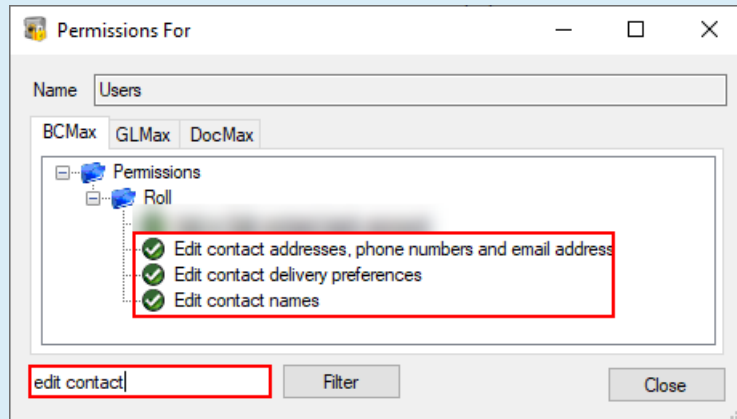
- Correspondence:**  Send by post,  Send by email
- Levy Notice:**  Send by post,  Send by email

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

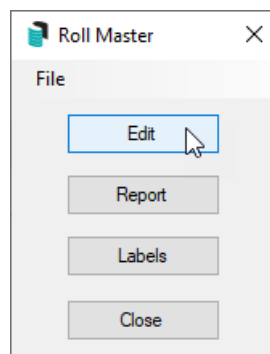
Agents & Mortgagees can only be deleted if they have never been used; this is to maintain all history & log records.

## View or Edit a Contact

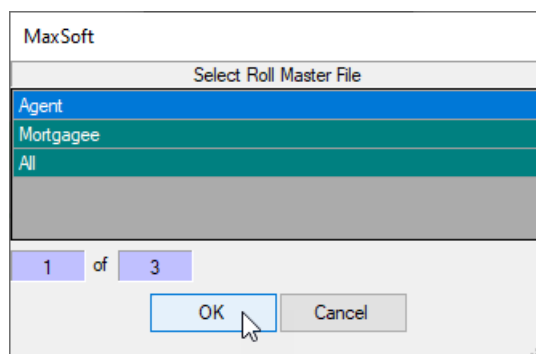
To be able to edit the *Office Bearer Contact Details*, you will need the following 'Edit' permissions under the 'Roll' category in **Security Setup**.



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

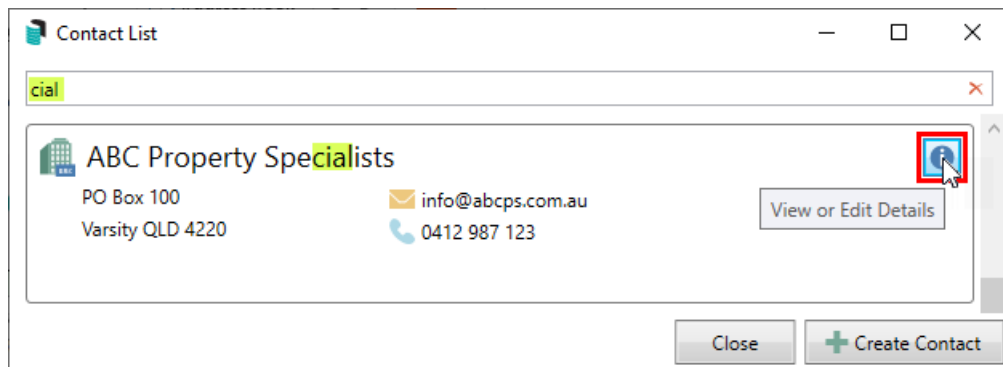


2. *Agent* should be selected by default, so click *OK*, and the *Contact List* will appear.

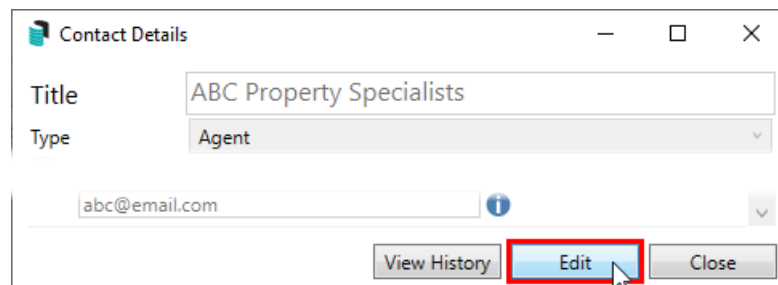


3. Use the *Search* at the top of the contact list to filter contacts.
  - It will search anywhere in the *Title* field. So typing "cial" will return contacts with the word "Spe<sup>cial</sup>" in the title, for example.

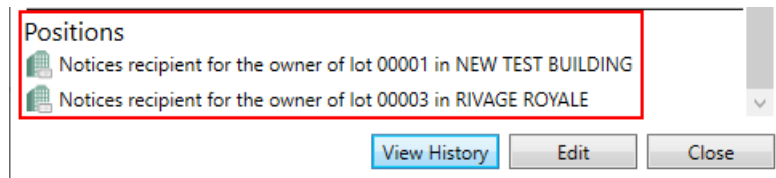
- It will search from the beginning of the *Phone* and *Email* fields.
- Use the red X button in the Search field to clear the field.



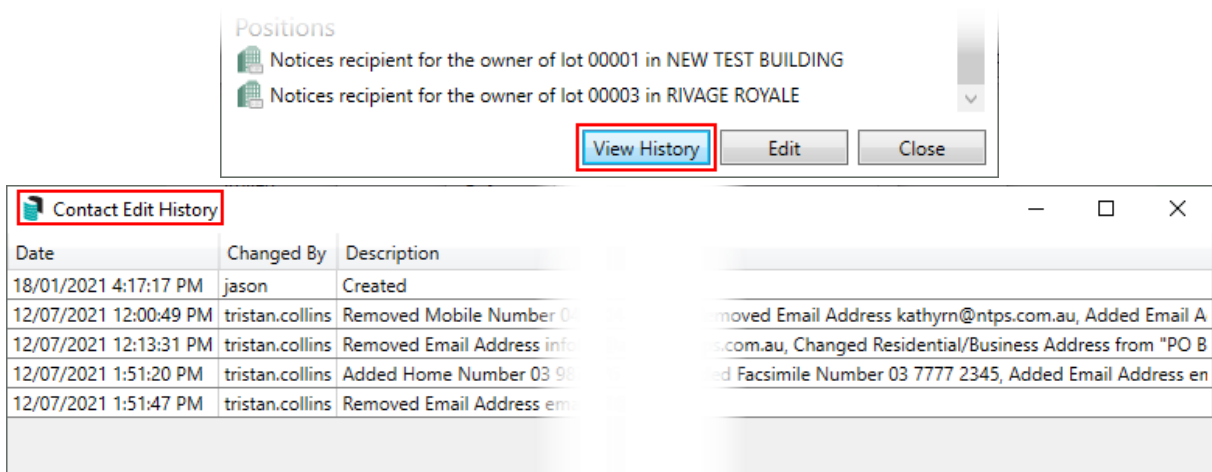
4. Click the blue **Info** button to open the *Contact Details* window.
5. To edit the details, click the *Edit* button.



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 prefer, 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*.