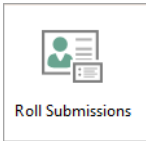


# Roll Submissions

Last Modified on 03/10/2023 2:58 pm AEST



The instructions in this article relates to **Roll Submissions**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

Roll Submissions are a change of details that have been submitted by an owner through the StrataMax Portal via the My Info > My Details screen. For lots where there is a single contact on the **Roll**, any Portal account with access to the lot can perform a change of details. For lots that have multiple contact cards, the contact card with the matching email address will be able to submit a change of details. Owners have the option via the StrataMax Portal to;

- Review current details for a property.
- Change or add Home, Business, Mobile and Fax numbers.
- Change or add email addresses.
- Change owner contact Delivery Preferences.
- Set whether Notice address or Levy only notice address is different to the Residential address.
- Set whether Committee and Meeting Notices should be sent (QLD only).
- Add a second submission even if pending submissions have not yet been approved.

It is important that the **Roll Submissions** screen is checked on a regular basis. There is a **Dashboard** tile available to display on your StrataMax Desktop to assist with identifying when roll updates have been submitted. An automatic notification for users in the security group 'Administrators' will display if a roll submission remains unprocessed for more than one month.

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## Roll Submission Video

## Dashboard for Roll Unprocessed Submissions

A **Dashboard** tile to show unprocessed Roll Submissions is available to add to the StrataMax Desktop. The tile will show any unprocessed Roll Submissions when selected and the data can also be exported to Excel. We recommend this Dashboard tile is added to the StrataMax Desktop to assist with identifying when roll updates have been submitted via the StrataMax Portal for review and processing. The Title is Roll Unprocessed Submissions.



Roll  
Unprocessed S...

## Roll Submissions Configuration | Security Setup

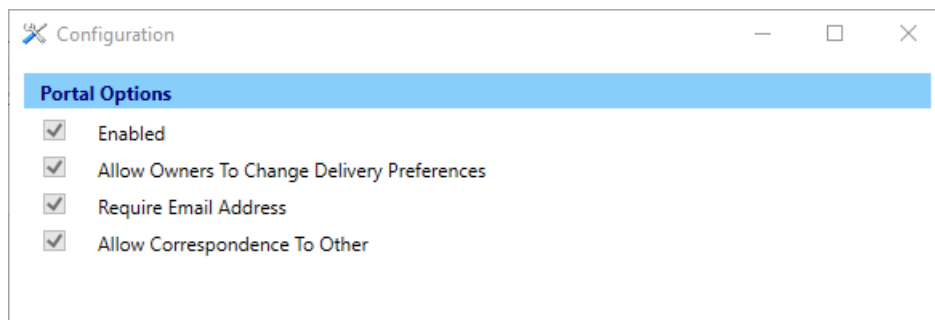
The ability to *Edit* the Configuration in **Roll Submissions** is controlled by permissions in **Security Setup**. This provides control over who can and can't adjust the configuration options which includes adjustable options so you can control how owners use the Roll Submissions features. The Roll Submission Configuration will be set to 'Deny' on upgrade and can be adjusted;

1. Search or select **Security Setup**.
2. Select user or Group name as required.
3. Locate 'Roll Submission Configuration', right click to adjust security permissions and *Close*.

## Roll Submissions | Configuration

Roll Submissions is for managing roll adjustments submitted by owners from the StrataMax Portal. There are settings available to determine how owners use the Roll Submissions feature on the StrataMax Portal. If security is granted, you can control how owners use the Roll Submissions features;

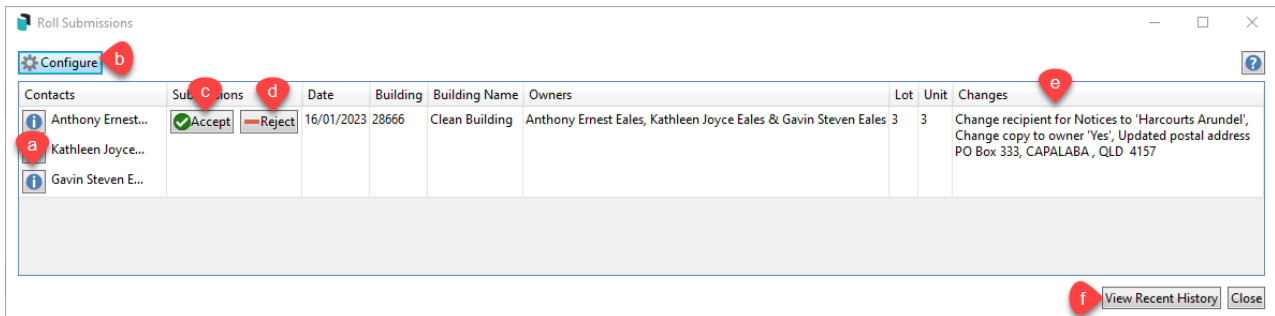
1. Search or select **Roll Submissions**, and click *Configure*.
  - **Enabled** - tick to allow owners to submit a change of details on the StrataMax Portal.
  - **Allow owners to Change Delivery Preferences** - tick to give owners the ability to change their delivery preferences on the StrataMax Portal.
  - **Require Email Address** - Requires owners to always specify an email address when making changes.
  - **Allow Correspondence to Other** - Allow selection of Agent / Mortgagee or Other for Correspondence and Notices. Please be aware that the Agent / Mortgagee or Other contact must already be recorded on the roll for the lot.



## Roll Submissions | Overview

Roll Submissions is for managing roll adjustments submitted by owners from the StrataMax Portal. From this menu, configure StrataMax Portal options, Accept or Reject a submission, review pending changes, edit a contact and view recent history of changes.

1. Search or select **Roll Submissions**.



a) Edit Contacts - If the details submitted by an owner need to be modified to match your standard formatting or if there is an obvious mistake, this can be completed by clicking the (i) option to edit the details manually, then click the (x) option to save and close the record before clicking *Accept*.

b) Configure - Settings available to determine how owners use the Roll Submissions feature. Refer to [Roll Submissions | Configuration](#) above.

c) Accept a Submission - View the 'Changes' column and then click *Accept* to update the contact card and/or delivery preference for the Lot. Once *Accept* has been clicked the record will be removed from the unprocessed submission screen.

d) Reject a Submission - View the Changes column and if the details do not look correct or require modification then click *Reject* to prevent the change to the Lot. Once *Reject* has been clicked the record will be removed from the unprocessed submission screen.

e) Changes - View the pending changes.

f) View Recent History - View History to see if a change has been accepted or rejected.

## Process Roll Submissions | Quick Reference Guide

**Roll Submissions** is for reviewing any changes of details that have been submitted by owners through the StrataMax Portal. This is where you should check the details and accept, modify, or reject the submission.

1. Search or select **Roll Submissions**.
2. View the 'Changes' column and determine if the changes are to be accepted to update the contact card for the Lot, modified or rejected.
  - To modify formatting or spelling, click on the blue 'Info' icon in the 'Contacts' column, make your changes, then save and close the window.
3. Click *Accept* to process the changes to the contact card, or *Reject* to reject the changes. Once completed,

the record will be removed from the unprocessed submissions screen.

## View Historical Roll Submissions

Any Portal Submissions accepted or rejected are available to view within the ROLLED.LOG available via **Log Viewer** and will display the date and time stamp of what has occurred in StrataMax for the submitted change.

Tip: To save this search to use again, click *Save Search As*, create a description, and assign it to the User/Group. To load a previously saved search, click *Load/Delete Search* and select the blue arrow from the list to load these search parameters for searching.

1. Search or select **Log Viewer**.
2. Adjust the Category to ROLLED.LOG
3. The current building will be included as a field of restriction. Remove this field to search all buildings.
4. Refine any further fields for searching. Click *Refresh* to view the results.

The screenshot shows the 'Search Logs' window with the following search criteria:

Field	Condition	Value
Date/Time	is on or after	Today
Category	is equal to	ROLLED.LOG
Username	is equal to	

Below the search filters, a table displays 1 record:

Date/Time	Log Lev	Username	Description	Building	Category
3/08/2023 11:08:52 AM	Info		For Lot 02100002 Processed roll submission	1212	ROLLED.LOG

## Pending Roll Changes and Portal View

Roll changes that are submitted from Owners via the Portal are available to submit (based on this option being set to *enable* as described above) and will provide a submission ready to process in StrataMax via this **Roll Submission** area. The **Dashboard** item, *Unprocessed Roll Submissions* can also be used to alert for any new submissions. These pending roll changes will be available for the Owner to see from their User Account also, so it can be a timely exercise to process these.

These Roll changes can only be submitted by the Owner and if the Roll records contains an agent or other contact type, these can be selected to receive correspondence and levies on behalf of the Owner.

If the Roll records have been split, the first roll record will be available to be amended and there will be a prompt on the account to contact the Strata Manager directly to provide updates for these additional Owner contacts.

### View from the Owner's Login confirming the pending change (single owner)

## Change Details

**i** There is currently a change pending approval by MAXSOFT ACPT MAX017.

**i** The contact details for the following properties will also be updated: VICTORIA PALMS (651356) - Unit 11 (Lot 11), WATERMARK (65489) - Unit 10 (Lot 10)

Updating your details will update only your individual owner details recorded on the roll. If more than one owner is recorded on the roll, each owner should login and update their details using their own Portal account or place a request with MAXSOFT ACPT MAX017 to update their details on the roll. Refer to the [help page](#) for more information.

### Property Details

Building: LOGAN TOWERS (54651)

Lot Number: 8

Number of Owners: 1 **i**

Management Company: MAXSOFT ACPT MAX017

## View of split contact message from Owner's Login.

### Levy Notice

Send Levy Notice to Agent, Mortgagee or Other

**i** If a contact is not listed, contact your management company to provide them the new contact details so they can be recorded on the roll.

#### Contact

My Real Estate Agent - Letting Agent **+**

Copy to Owner

#### Your Delivery Preferences

The below relate to your delivery preferences, not Agent, Mortgagee or Other.

Email

Post