

Roll | Configuration and Overview

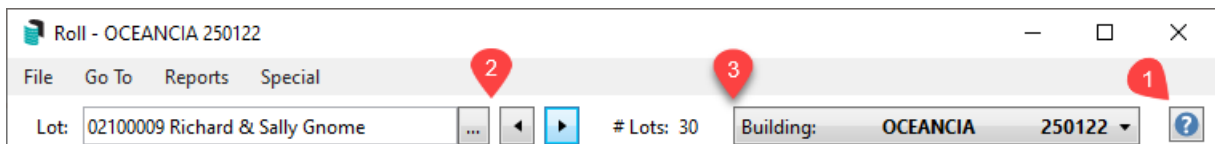
Last Modified on 15/07/2025 12:19 pm AEST

- The instructions in this article relate to the **Roll** screen configuration and an overview of its functions, including the various automated roll reports available when changing the ownership of a lot in a building. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

Access is controlled by allowing permission to the **Roll** menu in **Security Setup**.

For instructions on procedures in the **Roll**, please refer to this link [here](#).

Roll | Overview



1. *Help* opens online help search results for the term 'Roll'.
2. The *Lot* field is to change the lot account and can be used for the forward and back arrows to navigate to a different lot. Or use the ... to select the lot directly.
3. *Building Selection* is for changing to a different building.



4. Edit Lot Information

The *Pencil* in the 'Lot' section icon is for editing the following fields: *Lot Number*, *Unit Number*, *Plan*

Number, Title/Reference, and Lot Address. For changes to lot entitlements, you will need to complete a [Change of existing lot entitlements](#).

- If there are any data links, there will be a note to confirm this here.

□

- **Edit Plan Number information.**

Click the ellipsis button [...] next to the *Plan Number* field to open the *Plan Edit* screen, where you can add more plan numbers, edit the existing plan number, and change the plan type.

Click [here](#) for further instructions on how to apply different plan numbers.

| Plan Number | Plan Date | Plan Type | Lot Count |
|-------------|-----------|-----------|-----------|
| 104853 | | B.F.P. | 4 |
| | | | 0 |

+ Add Plan Save Close

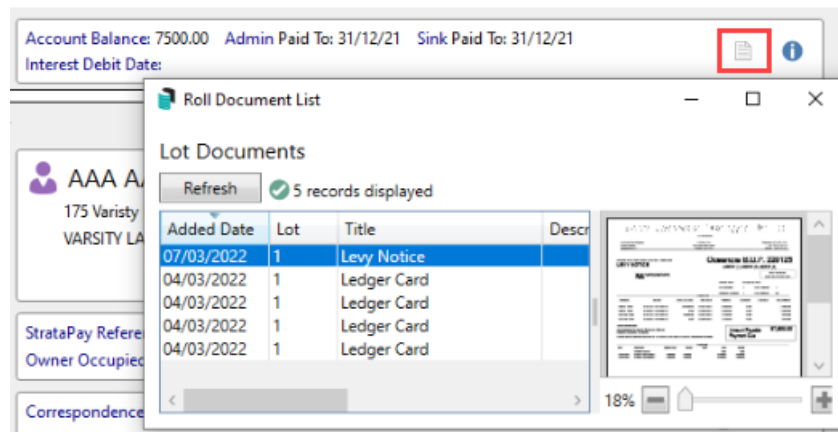
- **Copy Lot Address information.**

Click the *Copy* button to copy the *Lot Address* information to other lots in the building. Upon clicking the *Copy* button, tag the required lots, then click *OK*. Click [here](#) for further instructions on how to apply lot address information.

□

5. **View Document Attachment**

The *Document* button will display a preview of Levy Notices, Arrears Notices, Ledger Cards, Invoice Printing and Merge Letters produced for the owner, and include the date produced. Also, the email address information will be included if sent by email. Double-click on the document or right-click to use the DocMax function to email this document or complete any other DocMax function.



6. View Ledger Card

The blue *Info* icon will display an onscreen ledger card for the selected lot account.

| Date | Description | DR | CR | Due | Balance |
|------------|---------------------------|-------------|----|-----------------------------------|---------|
| 31/01/2022 | Levy 01/04/22 to 30/06/22 | 1250.00 | | 01/04/2022 | 1250.00 |
| 31/01/2022 | Levy 01/04/22 to 30/06/22 | 2500.00 | | 01/04/2022 | 3750.00 |
| 31/01/2022 | Levy 01/01/22 to 31/03/22 | 1250.00 | | 01/01/2022 | 5000.00 |
| 31/01/2022 | Levy 01/01/22 to 31/03/22 | 2500.00 | | 01/01/2022 | 7500.00 |
| | | Ledger Card | | Balance: 7500.00 Overdue: 7500.00 | |

Owner

Richard & Sally Gnome

18 Body Corp St

BODY CORPORATE LAND

✉

✉

7

10

8

9

StrataPay Reference: 972026872 Car Space: Storage Space:

Owner Occupied: No Direct Debit: Not Set Up

Correspondence

General: Email to Owner Levies: Email to Owner Utility Bills: Email to Owner

12

11

13

14

15

16

17

18

19

☐ Show Retired / Terminated Positions

Change Ownership

Add ▼

View History

Data Links

Notes

Close

The Owner section contains the contact information for the current owner of the lot and will be displayed within the Owner section. This may include single or split contact information depending on how many people own the selected lot.

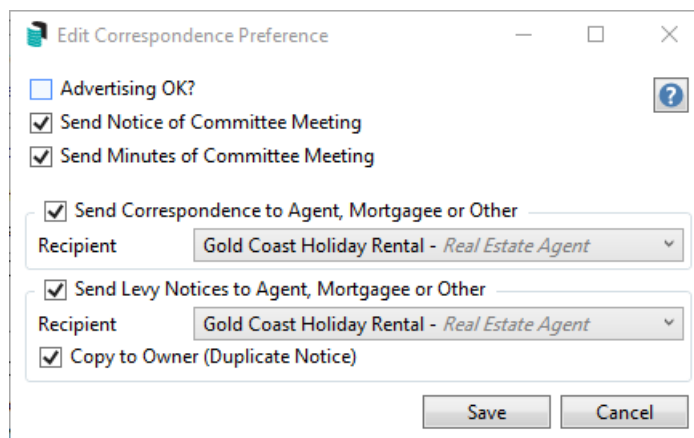
7. The *Split* icon will appear when multiple ownerships that include **&**, **and** or **,** characters, ready to split these into individual contacts. This will offer control over specific contact reporting and function for each.
8. The *Expand* arrow reveals the contact information including address, phone, email and website information. It will also allow for the bank account information to be entered. It does not replace the current *Direct Debit (Owner Bank Account/EFT Setup)* function for an owner refund or reimbursement.
9. The *Pencil* icon opens the *Contact Card* screen for the *Ownership details* where the information can also be edited.
10. The blue *Info* icon displays a preview of the *Contact Card*, and also allows for the information to be edited.

Other information available in this area includes; the *StrataPay Reference* number with the *Direct Debit* status (if applicable), *Car* and *Storage Space* information.

Correspondence Preferences

The **Correspondence** delivery arrangements are included in this area, specifically for General Correspondence, Levies and Utility Bills. This area is used to refer to when setting *Correspondence and Levy Notice* delivery arrangements when using an Agent, Mortgagee or Other types.

11. **Expand arrow:** This will confirm all delivery methods, including the email addresses for emails and postal information for the post.
12. **Pencil:** Editing the correspondence preferences, including the contact preferences for *Agent, Mortgagees or Other* if not configured for receiving information when adding the contact.



Edit Correspondence Preference

☐ Advertising OK?

☒ Send Notice of Committee Meeting

☒ Send Minutes of Committee Meeting

☒ Send Correspondence to Agent, Mortgagee or Other

Recipient: Gold Coast Holiday Rental - Real Estate Agent

☒ Send Levy Notices to Agent, Mortgagee or Other

Recipient: Gold Coast Holiday Rental - Real Estate Agent

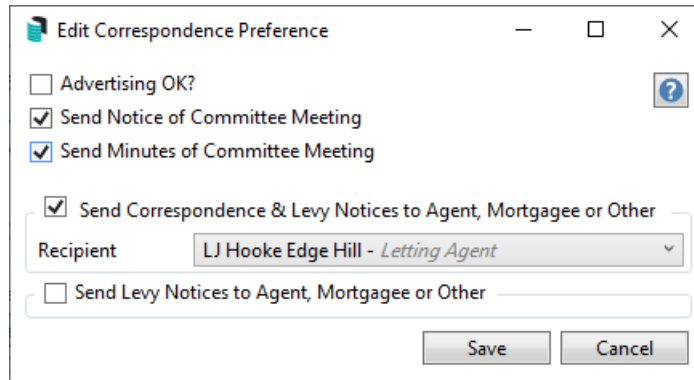
☒ Copy to Owner (Duplicate Notice)

Save Cancel

Send Correspondence to Agent, Mortgagees or Other when ticked will allow the recipient to be selected.

Send Levy Notices to Agent, Mortgagees or Other when ticked will allow the recipient to be selected.

Copy to Owner (Duplicate Notice) when ticked will deliver a copy of Levies and Arrears based on the individual contacts for email and mail preferences. If the email or postal address match for the duplicate copy, one copy will be delivered.



Send Correspondence & Levy Notice to Agent, Mortgagee or Other when ticked will allow both the correspondence and levy notice to be selected for delivery for this recipient.

13. **Show Retired / Terminated Positions:** This will display any contact that has been terminated as a contact from the selected lot account.
14. **Change of Ownership:** This will allow for the lot ownership to be changed.
15. **Add:** Add another contact type of the selected lot account.
16. **View History:** This area will provide a log of the ownership changes made. Within this screen, the 'Change Log' button will provide further information, including username and time/ date stamps with more detailed information of the change.
17. **Data Links:** Linking Owners who own another lot in the selected building or another is where this can be done.
18. **Notes:** This area will contain any notes available on the lot account. Certain processes will also create system notes, for example: Certificates and Arrears notices.
19. **Close:** Close the roll screen.

Email Purposes

A contact can be set to include emails for a specific purpose. This can apply to any contact in StrataMax.

Correspondence: This email will be used for areas like **Merge Letters**, **Meeting Hub**, and all other Roll Report areas that are not related to Levy, Arrears, or Utility.

Levy Notice: Used in **Levy Notice/ Reports**, **Invoice Printing**, and **Arrears Notice**.

Utility Billing: This email address is applicable for the **Utility Billing** module. It will allow an agent or other roll record to have a specific email applied.

Work Orders: Primarily used for **Creditor Maintenance** contacts and will allow **TaskMax** to send emails to this specific address.

Invoice Hub: This email will allow Committee Members (**Office Bearers**) to use a specific email to approve invoices via the Portal.

Committee Correspondence: Used for **Status Report** (Committee only) report.

Remittance Advice - This email will be used for specific **EFT Manager** remittance advice.

Postal Address +

2116/20 Stuart St Residential/Business -

TWEED HEADS NSW 2485

Phone +

Email Address +

ed@eggs.com All -

Bank Account

BSB Branch Account No

Website

Delivery Preferences

Correspondence ☐ Send by post ☒ Send by email

Levy Notice ☐ Send by post ☒ Send by email

Utility Bill ☐ Send by post ☒ Send by email

Positions

☒ Correspondence

☒ Levy Notice

☒ Utility Billing

☒ Work Orders

☒ Invoice Hub

☒ Committee Correspondence


☒ Remittance Advice




Save Cancel

Further contacts included on the Lot

If there are any further contacts, Entitled Persons, Nominees, Power of Attorney, Mortgagees, Real Estate agents, or Other Persons included with the lot account, these will be displayed under their respective headings.


Tenant





Ann Maree Ashworth



2040/Gracemere Gardens Circuit
Hope Island Resort
Hope Island QLD 4212



Real Estate Agent


#Gold Coast Holiday Rentals

PO Box 1501
SURFERS PARADISE QLD 4217


services@gchr.com.au

1300 588 277


0450 896 557

07 5539 8553

☐ Show Retired / Terminated Positions
Change Ownership
Add ▼
View History
Data Links
Notes
Close

Roll | Configuration

The below configuration options will assist in configuring the Roll screen set from **Roll** / File / Configure, with each setting confirming if User or Global groups are affected.

Show Lot Selection on Load (user setting)

This will display the lot selection list on launching the Roll. If not configured, select the Lot account from the Lot selection tool.

Owner reference name switch (user setting)

The Name Switch refers to the automatic switching of the last and first names entered in the Reference field when setting up a new lot, or conducting a change of ownership.

Meeting Notice Flag (user setting)

This configuration will set what the meeting flag (send Committee Meeting Notices or Minutes) would be in the Roll when new lots are created, or when a change of ownership is done.

Label Printing and Merge Letters use this setting to exclude lots that have been set to 'N' (No) when preparing labels or creating a merge letter.

Clear Arrears Notice on Transfer (global setting)

This setting will reset the arrears notice schedule when a change of ownership is done after the *New Owner Arrears Days / Arrears Days Key Field* has been reached (configured in [Arrears Notice settings](#)).

Change of Ownership & Change of Details - System-generated Report Sets

The settings in the Report Distribution window determine what merge letters and reports are configured when a change of ownership or details is performed, such as a Roll Details Confirmation Form, StrataMax Introduction Letter or Levy Notice. These reports can be adjusted and set to include as many reports and merge letters as desired, or include none if preferred. When a change of ownership or detail is applied to the **Roll** record, these will be automatically produced based on what has been set in each. A

Change of Details does not require a Merge Letter to be included.

Adjusting Intro Letters Roll Report Set.

1. Search or select **Merge Letters**. Click Cancel to the *Merge Letter Report Selection List*.
2. Select *Intro Letters - Change of Details* or *Intro Letters - Change of Ownership* from the Report Set drop-down. Each can be adjusted.
3. Review what has been set, and configure any templates. Example - Levy Notice, Roll Details Confirmation by selecting the cogwheel on each and setting.
4. Click **+ Report** to add any further *Merge Letters* or *Reports*. These will be added one at a time.
NOTE: Click the red cross to remove existing merge letters and reports.
5. Click the **Save** icon to update the report set.
6. Repeat for the other Intro Letter type if required.

NOTE: If a *Roll Details Confirmation* report has been included in a **Report Set** it is recommended that the Confirmation Details Text is reviewed.

Report Distribution - Oceania 12345

Welcome Letter

Building: Oceania 12345

Report Set: Intro Letters - CI

Page Numbers ☐ Consolidate by Contact ☐

Distribution Method

- ☒ Post Microsoft Print to PDF
- ☒ Email
- ☐ SMS
- ☒ Save Report
- ☒ Use Preferences

Correspondence

Recipient Type: Owner

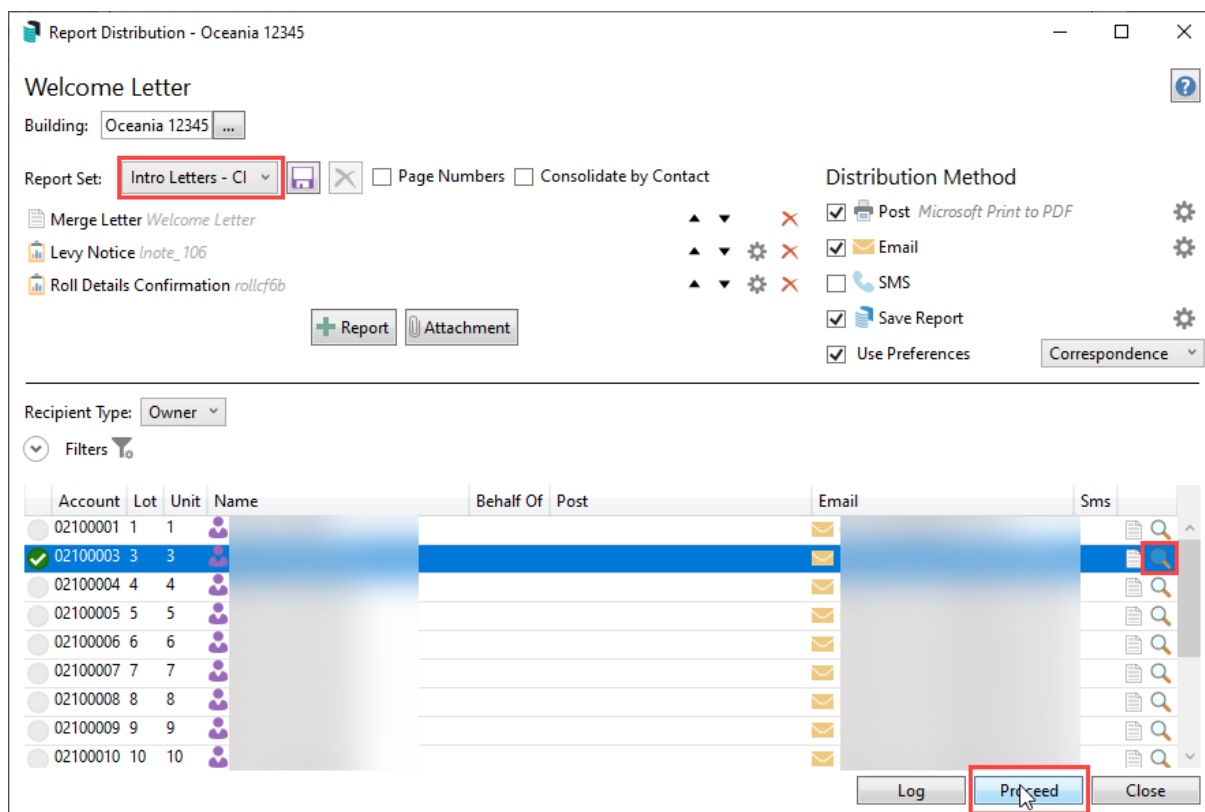
Filters

| Account | Lot | Unit | Name | Behalf Of | Post | Email | Sms |
|----------|-----|------|------|-----------|------|-------|-----|
| 02100001 | 1 | 1 | | | | | |
| 02100002 | 2 | 2 | | | | | |
| 02100002 | 2 | 2 | | | | | |
| 02100003 | 3 | 3 | | | | | |
| 02100004 | 4 | 4 | | | | | |
| 02100005 | 5 | 5 | | | | | |
| 02100006 | 6 | 6 | | | | | |
| 02100007 | 7 | 7 | | | | | |
| 02100008 | 8 | 8 | | | | | |

Log Proceed Close

Redistributing Intro Letters Roll Report Set.

1. Search or select **Roll**. In the Account Code List, select the required lot and click **OK**.
2. From *Reports / Print Intro Letters*, select *Change of Details* or *Change of Ownership*.
3. The selected account will be tagged in the *Report Distribution* window. Click *Proceed* or the *Magnifying Glass* icon to preview the report set.



4. From the *Report Publish* window, click *Proceed* to finalise the distribution.

Change of Details - Remove Merge Letter

The settings in the Report Distribution window determine what merge letters and reports are configured when a change of details in the **Roll** is performed, such as a Roll Details Confirmation Form, Merge Letter or Levy Notice. These reports can be adjusted and set to include as many reports and merge letters as desired, or include none if preferred. When a change of detail is applied to the **Roll** record, these reports will be automatically produced based on what has been set in each. It is possible to set only reports and not include a Merge Letter.

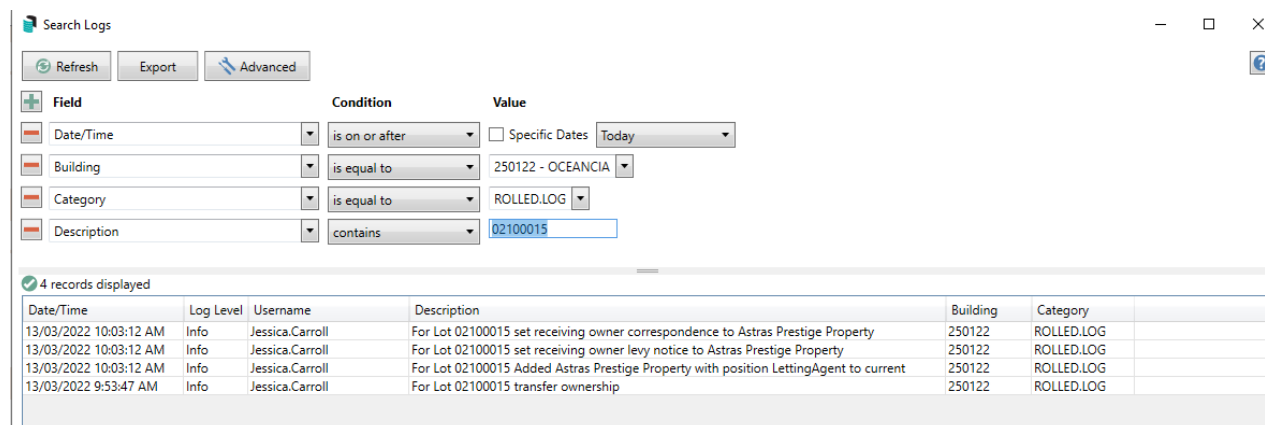
1. Search or select **Merge Letters**. Click Cancel to the *Merge Letter Report Selection List*.
2. Select the *Intro Letters - Change of Details* from the Report Set drop-down.
3. Review the reports set, and configure or remove any templates. Example - Levy Notice, Roll Details Confirmation by selecting the cogwheel on each.
4. Click the red 'x' next to the report to remove any *Merge Letters*.
5. Click the *Save* icon to update the Report Set.

Roll | File Menu

This area discusses the options available under the *File* menu in the **Roll**.

View Log

This opens the *Search Logs* window, pre-populated with various fields related to the **Roll** screen, specifically the log category of *ROLLED.LOG*. Click the green 'plus' button to add fields and enter information based on search criteria, or the red 'minus' button to remove fields. Use the *Description* field to enter keywords to drill into a specific lot account. Click *Refresh* to review the results.



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

| Field | Condition | Value |
|-------------|----------------|---|
| Date/Time | is on or after | <input type="checkbox"/> Specific Dates Today |
| Building | is equal to | 250122 - OCEANCIA |
| Category | is equal to | ROLLED.LOG |
| Description | contains | 02100015 |

4 records displayed

| Date/Time | Log Level | Username | Description | Building | Category |
|------------------------|-----------|-----------------|---|----------|------------|
| 13/03/2022 10:03:12 AM | Info | Jessica.Carroll | For Lot 02100015 set receiving owner correspondence to Astras Prestige Property | 250122 | ROLLED.LOG |
| 13/03/2022 10:03:12 AM | Info | Jessica.Carroll | For Lot 02100015 set receiving owner levy notice to Astras Prestige Property | 250122 | ROLLED.LOG |
| 13/03/2022 10:03:12 AM | Info | Jessica.Carroll | For Lot 02100015 Added Astras Prestige Property with position LettingAgent to current | 250122 | ROLLED.LOG |
| 13/03/2022 9:53:47 AM | Info | Jessica.Carroll | For Lot 02100015 transfer ownership | 250122 | ROLLED.LOG |

Add New Lots

This is where new lots can be added to the building. If the process is to add new lots to a new building, please see this [article](#). If the process is to add new lots to an existing roll, please refer to the [Resubdivision article](#).

Import Roll

This is used for importing the .xml file that has previously been exported. This does require some knowledge and skill in Excel, along with an understanding of Roll field requirements. Please get in touch with [StrataMax Support](#) in the first instance to discuss your requirements.

Export Roll

This will export the roll data onto a .xml file, which can then be opened and reviewed in Excel. This is mainly used in scenarios where the extracted data needs to be imported into StrataMax afterwards.

Please note that the *Import* and *Export* functions do not include the owner contact preferences.

Roll | GoTo Menu

Returned Mail Register

This will offer a shortcut to this register. Please refer to the [Returned Mail Register article](#) for more info.

Occupation

This register offers the ability to enter occupation information specific to a lot account. This offers a report only in this area and does not link with the **Roll**.

Roll | Reports Menu

Levy Notice & Correspondence Delivery Arrangements

Reporting how an owner receives the levy notice and correspondence can be done in this area, and is dynamic with settings offered for global agents and mortgagees and copies. Each lot will have two rows; one for the *Levy Notice* and one for the *Correspondence* (look under the 'Category' column).

1. Search or select **Roll**.
2. Select Reports/ *Levy Notice and Correspondence Delivery Arrangements*
3. Clicking the *OK* or *Cancel* button will close the window.
4. Clicking the *Show in Excel* button will open the contents in Excel where it can be filtered etc.

| Levy Notice and Correspondence Printing Arrangements | | | | | | | | | | |
|--|-------------------------|------------|-------------|----------------|-------|------|------------------|----------------|---|-----------------|
| Lot_Account_Number | Lot_Account_Name | Lot_Number | Unit_Number | Category | Email | Mail | Print_to_Address | Roll_Master_ID | Email_to | Mail_to |
| | Email Global Agent/M... | | | | | | Yes | | | |
| | Email Copy To Owner | | | | | | No | | | |
| | Email Where Set | | | | | | Yes | | This applies to Owners and Global Agen... | |
| | Contact Preferences | | | | | | Yes | | | |
| 02100001 | | 00001 | 1 | Levy Notice | Yes | No | Residential | | | |
| 02100001 | | 00001 | 1 | Correspondence | Yes | No | Residential | | | |
| 02100002 | | 00002 | 2 | Levy Notice | Yes | No | Levy Notice | 0000414209 | | ABC Letting Age |
| 02100002 | | 00002 | 2 | Correspondence | Yes | No | Residential | | | |
| 02100003 | | 00003 | 3 | Levy Notice | Yes | No | Residential | | | |

Tenanted Lots Report (NSW buildings only)

This report will confirm the total number of active residential lots per building, the number of active residential lots that are tenanted, the percentage of active residential lots that are tenanted, and the name of the tenant representative if one has been appointed and registered within the roll.

It only applies for buildings in NSW in your portfolio. Section 33 of the Strata Schemes Management Bill 2015 and Section 7 of the Strata Schemes Management Regulation 2016 stipulate the requirement for the Strata Manager to arrange for the appointment of a tenant representative, if 50% or more of the lots are tenanted.

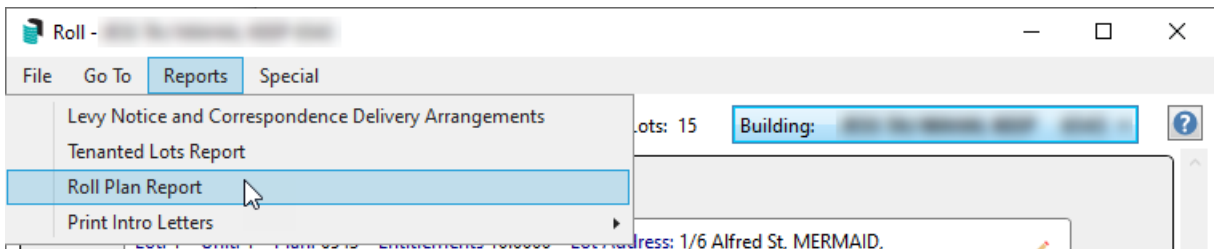
All buildings are reported so that any of which may be nearing a 50% limit can be identified and monitored.

When entering the *Lessee* contact in the **Roll**, select *Tenant Representative* to set the contact for reporting, and also adding to the **Office Bearer** area as a Tenant Rep, *Office Held* position.

Roll Plan Report (Lot Liability/Contribution Report)

This report opens in Excel, listing the building's lots with their contribution/liability and interest entitlements.

- 1. Search or select **Roll**.
- 2. Click *Reports > Roll Plan Report*.



- 3. The report will be displayed in Excel.

| Building Number | Lot Number | Plan Number | Contribution Entitlement | Interest Entitlement |
|-----------------|------------|-------------|--------------------------|----------------------|
| 6543 | 1 | 6543 | 10.00 | 10.00 |
| 6543 | 2 | 6543 | 10.00 | 10.00 |
| 6543 | 3 | 6543 | 10.00 | 10.00 |

Roll | Special Menu

Set StrataMax Charge Code

This is a Support only tool.

Transfer Agent Portfolio

This tool can be used to transfer an portfolio from one agent to another. Please refer to [Transfer Agent Portfolio](#) for more information.