

Roll | Configuration and Overview

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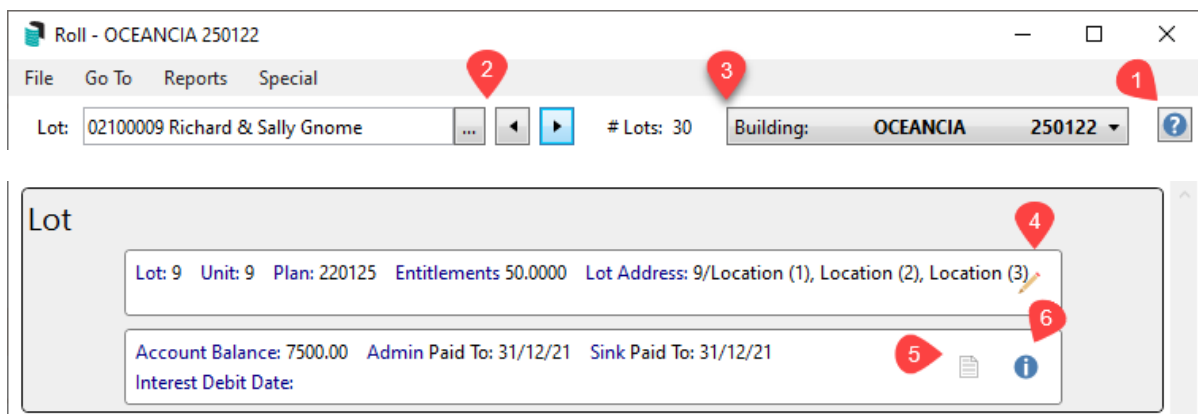


The instructions in this article relate to the **Roll** screen configuration and an overview of its functions, including the various automated roll reports available when changing the ownership of a lot in a building. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

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](#).

Roll | Overview



The screenshot shows the 'Roll - OCEANCIA 250122' window. The menu bar includes 'File', 'Go To', 'Reports', and 'Special'. The 'Lot' field contains '02100009 Richard & Sally Gnome' with a dropdown arrow and navigation buttons. The '# Lots' field shows '30'. The 'Building' field shows 'OCEANCIA' and '250122'. The 'Lot' section displays 'Lot: 9 Unit: 9 Plan: 220125 Entitlements 50.0000 Lot Address: 9/Location (1), Location (2), Location (3)'. Below this, it shows 'Account Balance: 7500.00 Admin Paid To: 31/12/21 Sink Paid To: 31/12/21 Interest Debit Date:'. A notepad icon and a blue information icon are also visible.

1. *Help* opens online help search results for the term 'Roll'.
2. The *Lot* field is used to change the lot account and supports the forward and back arrows to navigate to a different lot. Or use the ... to select the lot directly.
3. *Building Selection* is used to switch to a different building.
4. Lot Information
5. Notepad icon where the stored documents for the lot are available.
6. Blue (i) icon will display an on-screen ledger card.

Edit Plan Number

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](#).

1. Click the ... button to add to the information. Within the **Lot** area, select the pencil icon.
2. 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.
3. The initial plan number will be populated from **Building Information**.
4. Click + Add Plan, complete the Plan Number and Date, and select the Plan Type. Click Save.
5. From the Plan Number drop-down list, select the corresponding plan number for that lot. Click Save.

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

+ Add Plan Save Close

Lot Address Editor


1. Search or select **Roll**. Select a lot account.
2. Select the pencil icon to edit the lot address within the **Lot** area.
3. The unit number will be populated from the lot number field, and the street address will be updated based on the building's address information. Check and amend if required.
4. If this information has been amended and required to be copied to other lots, click the *Copy* button and tag the associated lots to update these simultaneously.
5. If the *Title/Reference* information requires population, it must be done for each lot.
6. If the *Effective Date* is incorrect, this can be adjusted now. This will need to be done for each lot.
7. For ACT buildings, select the Insulation Status and Insurance R-Value (numeric field). Click *Copy Insulation* to copy the details from these fields to other lots.
8. Click *Save*.

Lot

Lot: 1 Unit: 1 Plan: 87654 Entitlements: 10.0000
 Lot Address: 1/190 Smithon Ave, PALM COVE ACT 2913,

Account Balance: 0 Admin Paid To: \$

Owner

 **Developer**
 Developer - PO Box

StrataPay Reference: 102694052 Car: \$
 Owner Occupied: No Direct Debit: Not S

Correspondence

General: Post to Owner Levies: Post to O

Lot Edit -

Lot Number: 1
 Unit Number: 1
 Plan Number: 87654
 Title/Reference:
 Lot Address: 1/190 Smithon Ave Copy
 PALM COVE ACT 2913
 Effective Date: 01/07/2021
 Insulation Status: Installed
 Insulation R-Value: 5.00 Copy Insulation

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*.

Account Code List - AMETHYST COURT 15717

Search

Lots						
Code ^	Name	Lot	Unit	Plan	YTD Balance	
<input type="radio"/> 02100001	Moyes Family Superannuation Fund Pty Ltd...	00001	1	104853	5,810.00	
<input checked="" type="checkbox"/> 02100002	Earlee Products Pty Ltd	00002	2	104853	5,810.00	
<input type="radio"/> 02100003	Derek Norman Alexander	00003	3	104853	5,810.00	
<input type="radio"/> 02100004	Kamat Pty Ltd	00004	4	104853	5,810.00	

Count: 4

OK Cancel

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.

The Owner section contains the contact information for the current lot owner and is displayed there. 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.

Expand arrow: This will confirm all delivery methods, including email addresses and postal information.

Pencil: Editing the correspondence preferences, including the contact preferences for *Agent, Mortgagees or Other* if not configured for receiving information when adding the contact.

The screenshot displays the 'Correspondence' section of a software interface. It features three columns: 'General', 'Levies', and 'Utility Bills'. Each column contains a list of email addresses and a 'Post' address. Below these lists are checkboxes for 'Advertising OK?', 'Send Minutes of Committee Meeting', and 'Send Owners Tax Report'. To the right, an 'Edit Correspondence Preference' dialog box is open, showing a table with columns for 'Position', 'Title', 'Correspondence', and 'Levy Notices'. The table lists three roles: 'Owner' (Miss Deven Lang), 'Tenant' (Teagan Mraz), and 'Real Estate Agent' (Chauncey Bins). The 'Correspondence' and 'Levy Notices' columns have checkboxes that are either checked or unchecked. A warning message at the bottom of the dialog states: 'This combination of preferences will not support older reports (e.g. Levy Notice/Reports and Label Printing) and will only send correspondence to the first non-owner: Teagan Mraz'. 'Save' and 'Cancel' buttons are at the bottom right of the dialog.

Position	Title	Correspondence	Levy Notices
Owner	Miss Deven Lang	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tenant	Teagan Mraz	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Real Estate Agent	Chauncey Bins	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Correspondence when ticked will allow the recipient to be selected.
Levy Notices, when ticked, will allow the recipient to be selected.

Show Retired / Terminated Positions: This will display any contact that has been terminated as a contact from the selected lot account.

Change of Ownership: This will allow for the lot ownership to be changed.

Add: Add another contact type of the selected lot account.

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.

Data Links: Linking Owners who own another lot in the selected building or another is where this can be done.

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.

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 -

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** ⌵ ✎ i

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

Real Estate Agent

 **#Gold Coast Holiday Rentals** ⌵ ✎ i

PO Box 1501 ✉ services@gchr.com.au ☎ 1300 588 277
SURFERS PARADISE QLD 4217 ☎ 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

Merge Letter Welcome Letter

Levy Notice lnote_106

Roll Details Confirmation rollcf6b

 Report  Attachment

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.

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

Report Attachment

Recipient Type: Owner

Filters

Account	Lot	Unit	Name	Behalf Of	Post	Email	Sms
02100001	1	1					
02100003	3	3					
02100004	4	4					
02100005	5	5					
02100006	6	6					
02100007	7	7					
02100008	8	8					
02100009	9	9					
02100010	10	10					

Log Proceed Close

- 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.

- Search or select **Merge Letters**. Click Cancel to the *Merge Letter Report Selection* List.
- Select the *Intro Letters - Change of Details* from the Report Set drop-down.
- Review the reports set, and configure or remove any templates. Example - Levy Notice, Roll Details Confirmation by selecting the cogwheel on each.
- Click the red 'x' next to the report to remove any *Merge Letters*.
- 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			
<										
OK Show in Excel Cancel										

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.

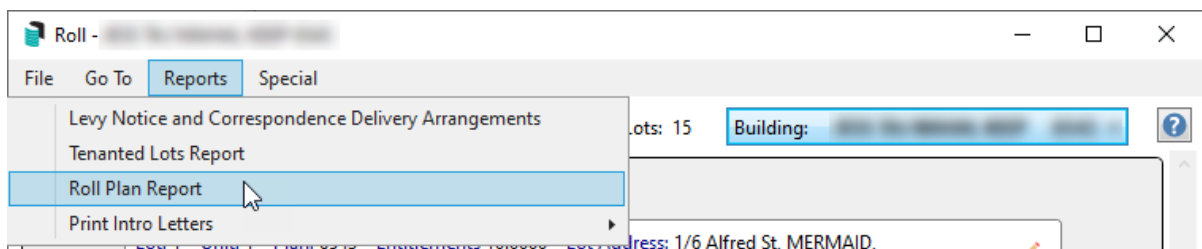
Building Number	Building Name	Account Manager	Number of Lots	Number of Tenanted Lots	% of Tenanted Lots	Name of Tenant Representative
19831	TRAINING SUB GROUPS	StrataMax Training	5	0	0.00	
19832	TRAINING CERTIFICATES		5	0	0.00	
2019	LANA RESORT VII	Lana Clarke	20	3	15.00	Lessee One

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.