Roll and Contacts | FAQ

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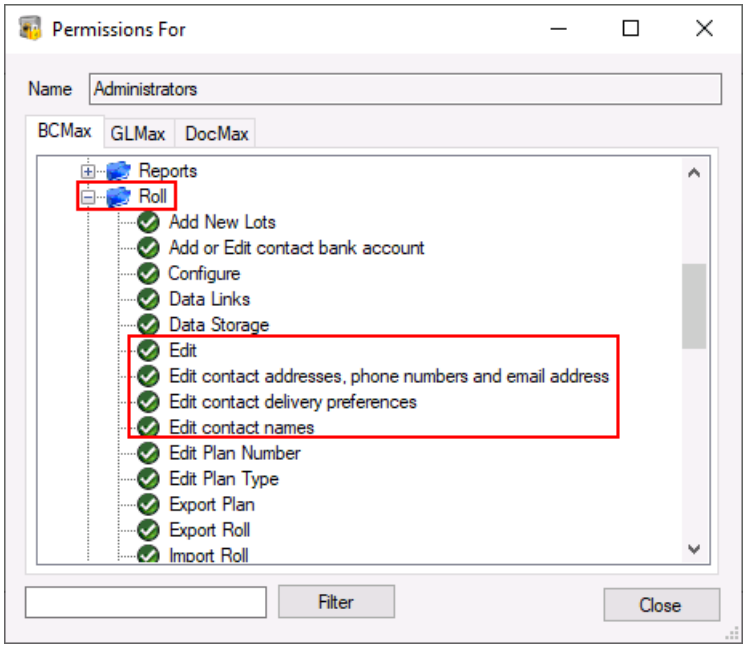
With the changes to Roll and Contacts, the below page includes some of the most frequently asked questions around how this area works.

We also have the Roll & Contacts FAQ videowhich covers these Frequently Asks Questions.

Security and Permissions

Q. Why can I not edit the details of a Contact?
A. In the previous roll version editing the roll would not write anything to the log therefore it was not recommended. However, editing a contact now will record the details of the change in the lot *History,* so can be done freely.

If you're not able to edit the contact at all, or certain details of the contact, check the permissions for editing a contact in the Roll. This is done in ***Security Setup***, and the following permissions need to be set to 'Allow'.



Q. After being updated to the version of StrataMax with the new Roll, is there anything our team need to action?
A. It is recommended to review the below to clean up duplicate records and owner office bearer unlinked records. Completing these actions will assist in having all areas that include contact records to be working as expected with clean contact information.

1. In ***Contact Management*** use item 3: *Merge Duplicate Contacts* to tidy up any potential duplicate contacts; this will help avoid user confusion when selecting a contact.

2. In ***Contact Management*** use item 4: *Owner Office Bearers Still Unlinked* to link committee members back to ***Roll*** records. You may like to *Split Combined Owners* when multiple owners own a lot for these records. This will help avoid user confusion as these records are essentially duplicates; step 1 above will remove some of these however where names are spelt different the merge will not work if done based on Name and Address information.

Q. For some users the split icon is not appearing for contacts with a **comma** or **and** in the name; why is this?
A. Users must have permission to Roll / Edit in ***Security Setup***.

Roll Processing

Q. In the ***Roll*** screen, I have done a recent change of ownership and note that the *StrataPay Reference number* recorded in the ***Roll*** has one more digit than the one that was provided in their Welcome Letter. Why is that?
A. The *StrataMax User ID*, 8 digits, is used in Welcome Letters and contains the number used to create a manual portal account. If this ID is being used for portal account creation, the password is also required. The *StrataPay Payment Reference* is used when making a payment and is commonly available on the deposit slip. This reference is different from the *StrataMax User ID* and must be entered in full using all 9 digits so the payment can be applied to the correct account.

Q. What is best practice when adding multiple owners and they have the same email address?
A. When using multiple owners who have the same email address, areas like ***Office Bearers*** should be considered when using these types of records. With having the same email address on file, only one copy of levies and correspondence will be sent to that email.

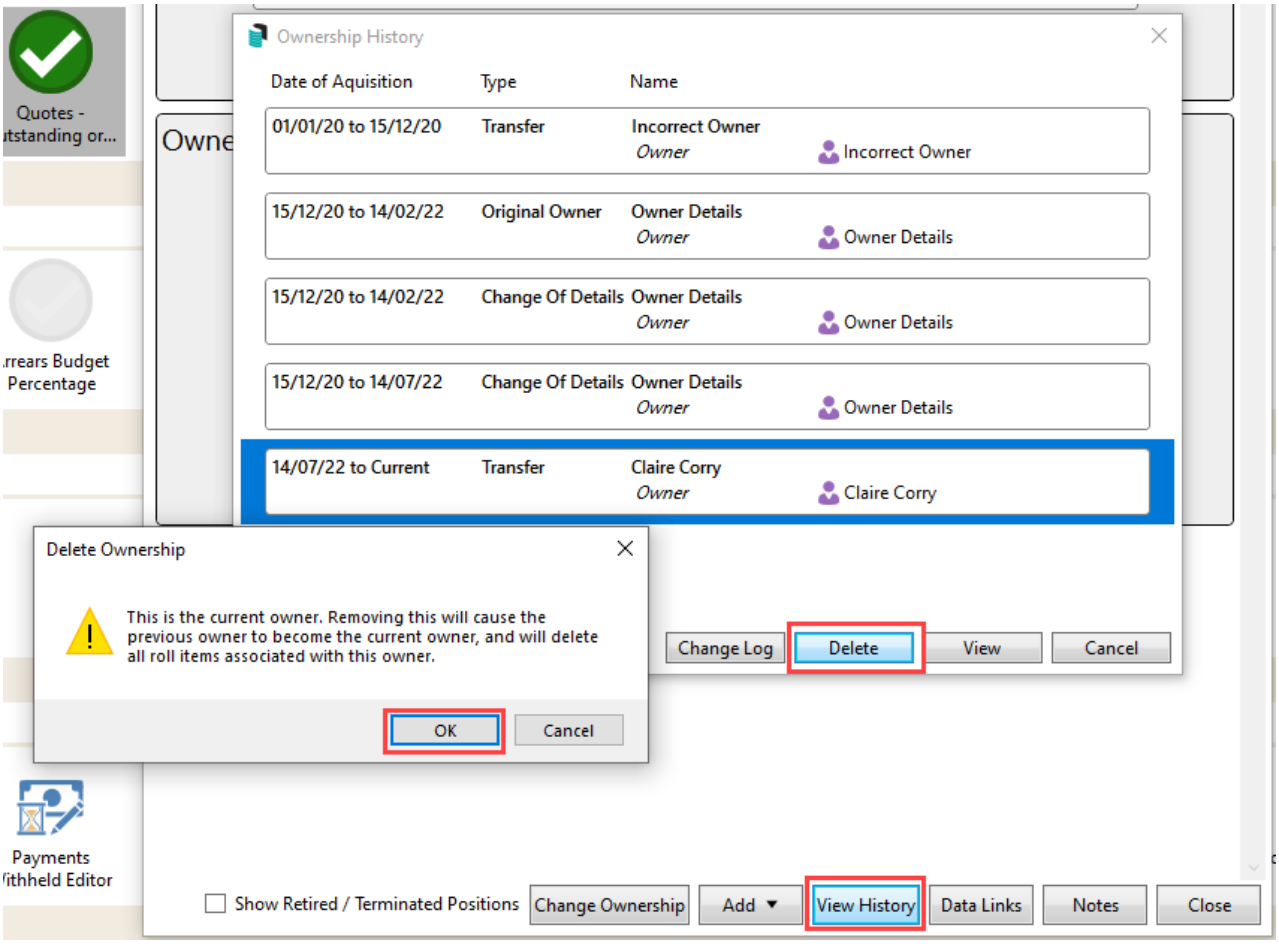
Q. In **Office Bearers** the contact is linked to a lot in the ***Roll*** owned by a Company, but the message Committee Member (Not Merged) is displayed in the Roll. Why is this?
A. If the ***Roll*** is in the name of a Company and a contact has been entered into ***Office Bearers*** and linked to this lot, this message will be displayed and does not need any action taken. This flag will not appear for these circumstances in a future version.

Q. How can I get a copy of documents or see what has been sent to a lot owner?
A. From the ***Roll***, select the document icon to open the Roll Document List screen. This lists all documents sent using Levy Distribution or Merge Letters and multiple can be selected by highlighting and then right click to Email or Print.

Q. How do we delete an incorrectly updated roll entry?
A. Ensure that you have permission in ***Security Setup*** to *Roll Delete History,* and select the lot account that has been incorrectly updated from the ***Roll***. Click *View History,* select the incorrect contact, and click *Delete.* Click *OK* in the message box for *Delete Ownership*. Any deleted roll entries are included in ***Log Viewer*** under the ROLLED.LOG category.

NOTE: Deleting a lot from the ***Roll*** is not possible and these instructions provide how to delete an incorrect contact assigned to a lot record.

This process will reinstate the previous owner's StrataPay reference number.



Q. How do I change the original owner due to an error?

A. If a Change of Ownership was recorded incorrectly, delete the incorrect roll entry to reinstate the previous owner. Ensure you have permission in **Security Setup** for 'Roll Delete History', select the lot account that was incorrectly updated from the **Roll**, click **View History**, select the incorrect contact, and click **Delete**, confirming in the Delete Ownership message box. The previous owner's StrataPay reference number is reinstated, and deleted entries are recorded in **Log Viewer** under the ROLLED.LOG category. See the question above for more detail.

Q. Can we have the option of updating for all or not when updating owners that own multiple lots?
A. The purpose of having a contact available with individual information is to allow levies, correspondence and utility bills to be sent to separate addresses. See this information *here* for how to manage the Roll.

Q. How do we add multiple Owners to a Lot?
A. When creating the change of ownership, click *Create Contact* or *Select Contact* to create each record. Once there are multiple contacts available, the system will create a combined *Reference Name*, *Address Title 1* and *2* and *Letter Title*. These fields can be adjusted to suit office format.

Q. How do we remove contacts from a lot? For example, if someone has passed away and no longer associated with the lot?
A. Complete a change of ownership, and the relevant contact will be available to click*Select Contact* with, and add the required contact back to lot account.

Q. Is there is any data validation available when editing details on contact card?
A. Yes phone and email is validated, for phone numbers the + symbol can be used. Once the Given

Names and Surname fields are populated there is also validation to ensure a Contact Card is not being edited to change the full name.

Q. Why is the Given Names and Surname fields blank?
A. The previous roll did not contain these fields, therefore on update the fields are left blank and can be updated as required by users. The fields are not currently used on reports.

Q. Can you search a phone number in the search field?
A. At this stage, phone numbers are not available to search. You can search for a contact by typing in the contacts name, email address or nine digit StrataPay ID.

Q. Will splitting a contact also recognise a "," where there may be three owners with same surname on a lot.
A. Yes, it will honour the comma in these instances. See *Split Combined Owners* for more detail.

Q. Can you search for StrataPay ID's for Sub-Groups?
A. This will be developed as the Sub-Group areas are developed for contacts.

Q. Recently we have received a change of details for a company that is a large name change. How can we now amend the reference name more than 30%?
A. It is important to note that in earlier versions of StrataMax, there was the ability to key over the names of current owner information which was not logged greatly. This did not allow for great transparency on any changed information. The shift in focus here means that this is now not available for large changes. The surname field should allow for simple changes and this can affect contacts that are in the name of a company. To process these, it must be done with a change of detail applied in small batches to amend the name by more than 30%.

Q. Does deleting unreferenced contacts affect the roll history?
A. No it doesn't, as it is in *History* it is still referenced and cannot be deleted. When clients are updated to the new roll, old historical contacts that are created so history shows they are hidden from contact selection list, merge list etc.

Q. For multi drives, when using the search bar for a contact name, email or StrataPay ID, will the contact automatically open on those drives?
A. It will search other drives if the result is not found within the drive they are searching.

Q. We previously used Global Name Search to locate what building an owner owned in; this is no longer available so what do we now use?
A. The desktop search bar can now be used to search contacts. The search results for contacts are based on searching a name, email or StrataPay ID; once a contact is clicked on the positions in which they are used in StrataMax are listed at the bottom of the contact card.

Q. Can we choose to reissue a levy notice to a specific contact instead of all contacts on the ***Roll***?
A. Yes, from the *Notepad* icon double clicking on the document or right click to use the standard ***DocMax*** functions to email the document using Communications.

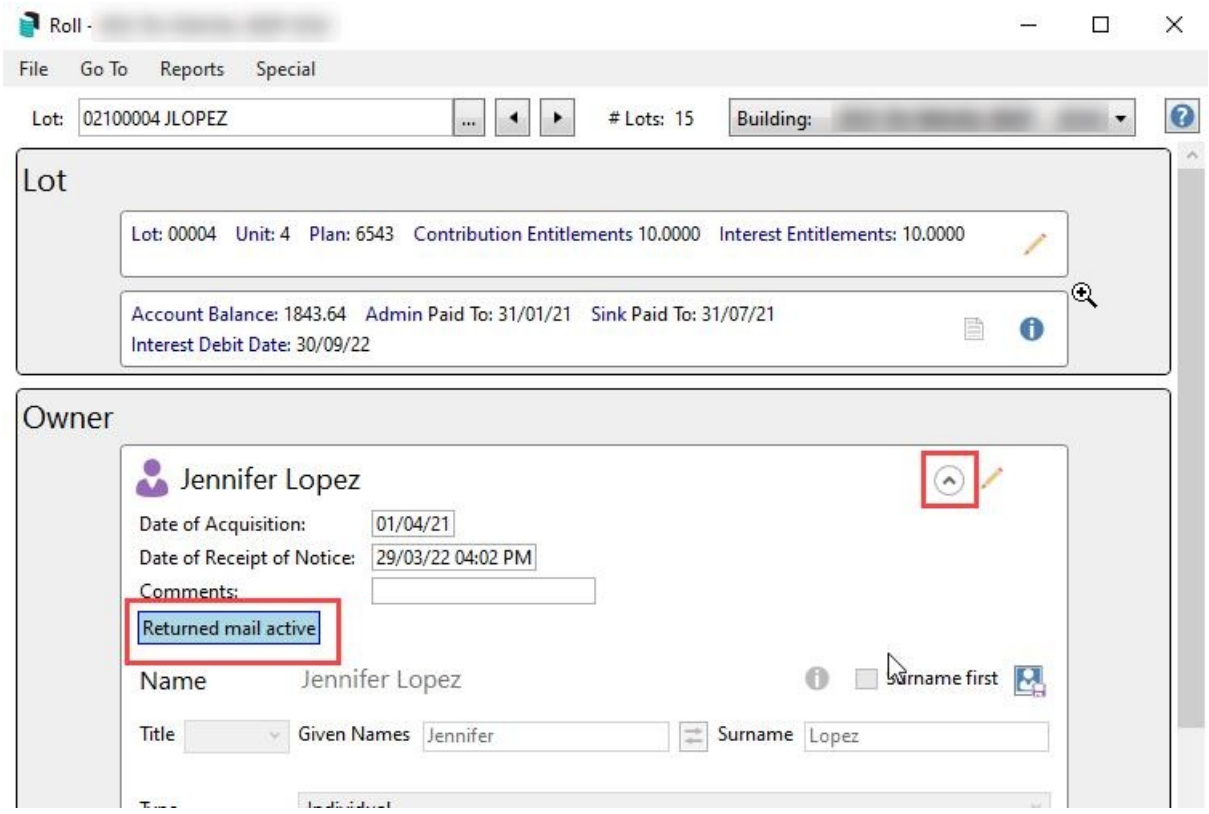
Other areas using Contacts

Q. When printing labels, if there is an agent included for the contact, what email address will be

provided?
A. Labels will now be available to produce contact lists with both the owner and agent contact information included. Please refer to *Label Printing (Debtors)* for further information.

Q. Once a contact has been split when using reports like the ***Roll Details Confirmation*** or modules such as ***TaskMax*** and selecting a roll record, only the first contact is displayed - why is this?
A. Some areas use the combined contact names rather than individual contacts. These areas will transition to the individual contact method as we develop further contact enhancements. Currently split contacts use the combined names and the address information for the first contact to display on the report or from the screen. Based on the contact preferences for each record, for example being email for both contacts, each one will receive a copy of the report. If the contact preference is set to post, only one copy will be delivered to the first contact on the Roll.

Q. How do we now see lots that are in the returned mail register?
A. Lots when added to the ***Return Mail Register*** will flag in the Owner area when expanded. The principal behind this; the returned mail is the contact flag and the Legal Action and Data Link flag will display on the ***Lot*** area.



Q. How do we create an Office Bearer member for a split or non split contact? What's the difference and what about Portal access?
A. If contacts are not split, when selecting the ***Office Bearer*** of a combined owner, you must create a contact for the office bearer and copy across the contact information, and importantly select the *Owner of Lot* field. This will create an additional contact to manage but maintain the portal access with the *Owner of Lot* field. It is recommended to split contacts, and when assigning the Office Bearer using the *Select From Roll* option, select the correct single contact. Using the split contact information means only needing to apply an update to the one contact should the information change.

Q. Can we record different contact details for the ***Office Bearer*** contact from the details in the contact that was selected from the ***Roll***?
A. No, if a contact is selected from the roll, any details changed will be reflected in the roll also as it is the same contact card being used. If required; a new contact would need to be created.

Q. Can we download / save documents from the preview option on the ***Roll***?
A. Yes, double clicking on the document or right click to use the standard ***DocMax*** functions to save the document somewhere. This includes the notepad icon available in the lot area in the roll screen.

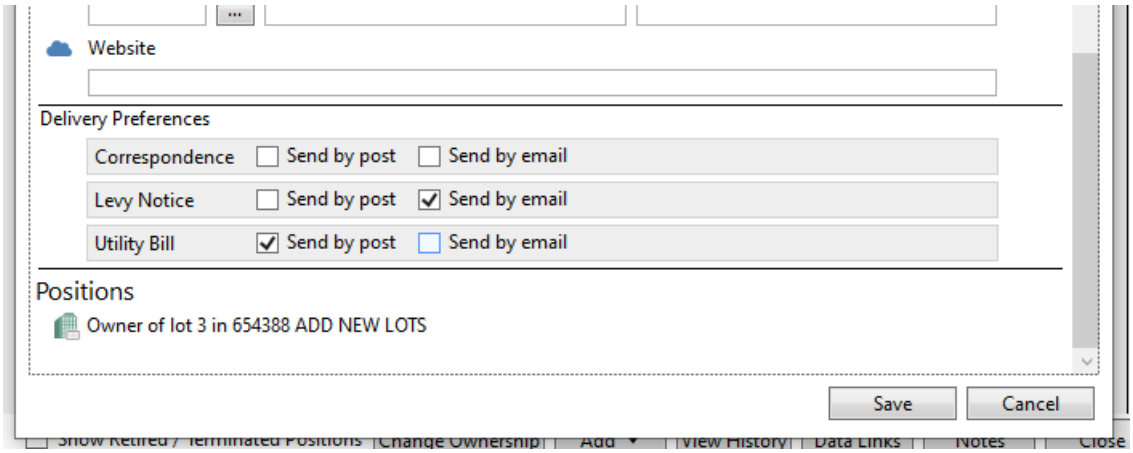
Q. Is there the ability to merge letting / selling agent contacts?
A. Depending on what the outcome needed to look like, *Transfer Agent Portfolio* will transfer the contacts from one agent to another. Or the ability to *Merge Contacts* can be done via ***Contact Management***.

Q. Will Sub-Groups be showing as linked on the owner roll and is there any functionality to preview these types of documents?
A. Links remain for sub groups for now, ***Stored Reports*** for Sub-Groups are available in ***DocMax***, 5.6.65 and can be viewed directly from ***DocMax***. At this stage only the levies, ledger cards and arrears notices for the main are available for preview in this area.

Q. Does the data links for an account just flag that there is a data link, or will it update the data links?
A. It will flag in the *Lot* area in the Roll.

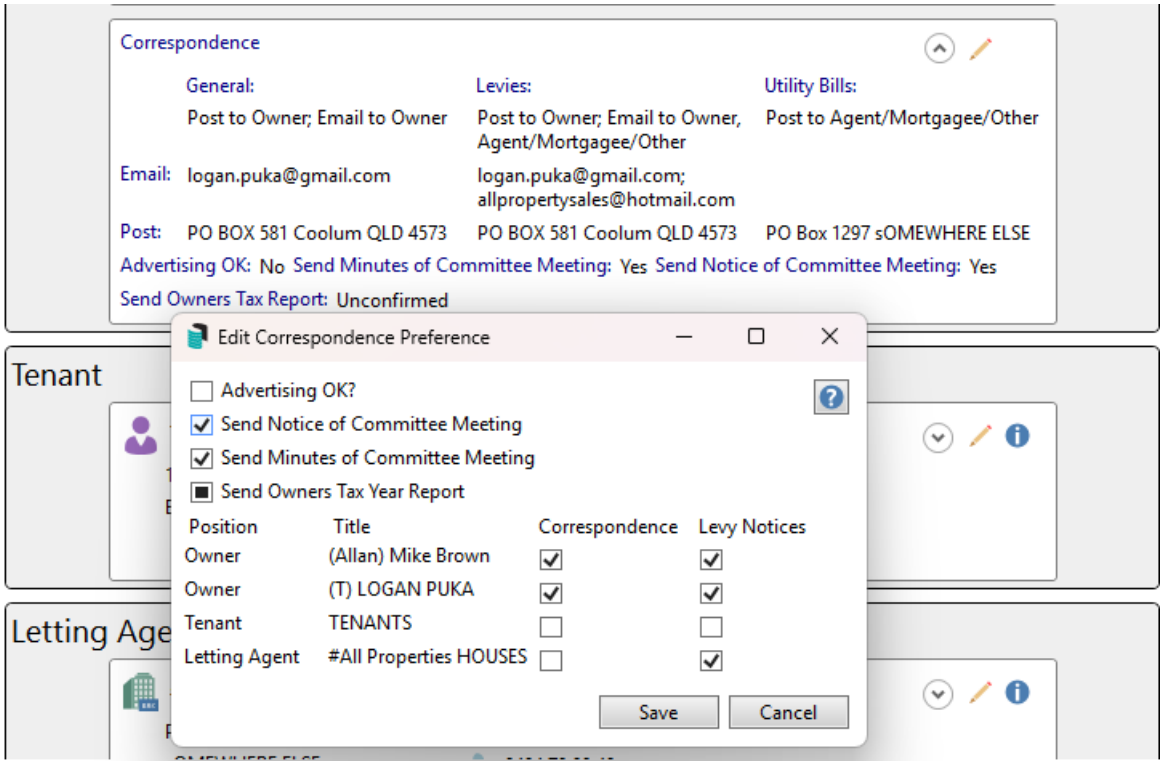
Contact Preferences

Q. If we have multiple owners and only one person wishes to receive either the levies or correspondence, how do we achieve this?
A. Within the *Delivery Preferences* area for each contact; ensure that you have the types selected for the Owner that wishes to receive and unselected for types that are not wished to be received.



Q. If there are multiple owners with different addresses, will there be the option to send a levy notice to each postal address?
A. Yes, a notice will be delivered to each contact within the Owner area using their *Levy Notice* contact preference for each. If an agent, or any other type is included, they can be configured to receive levies

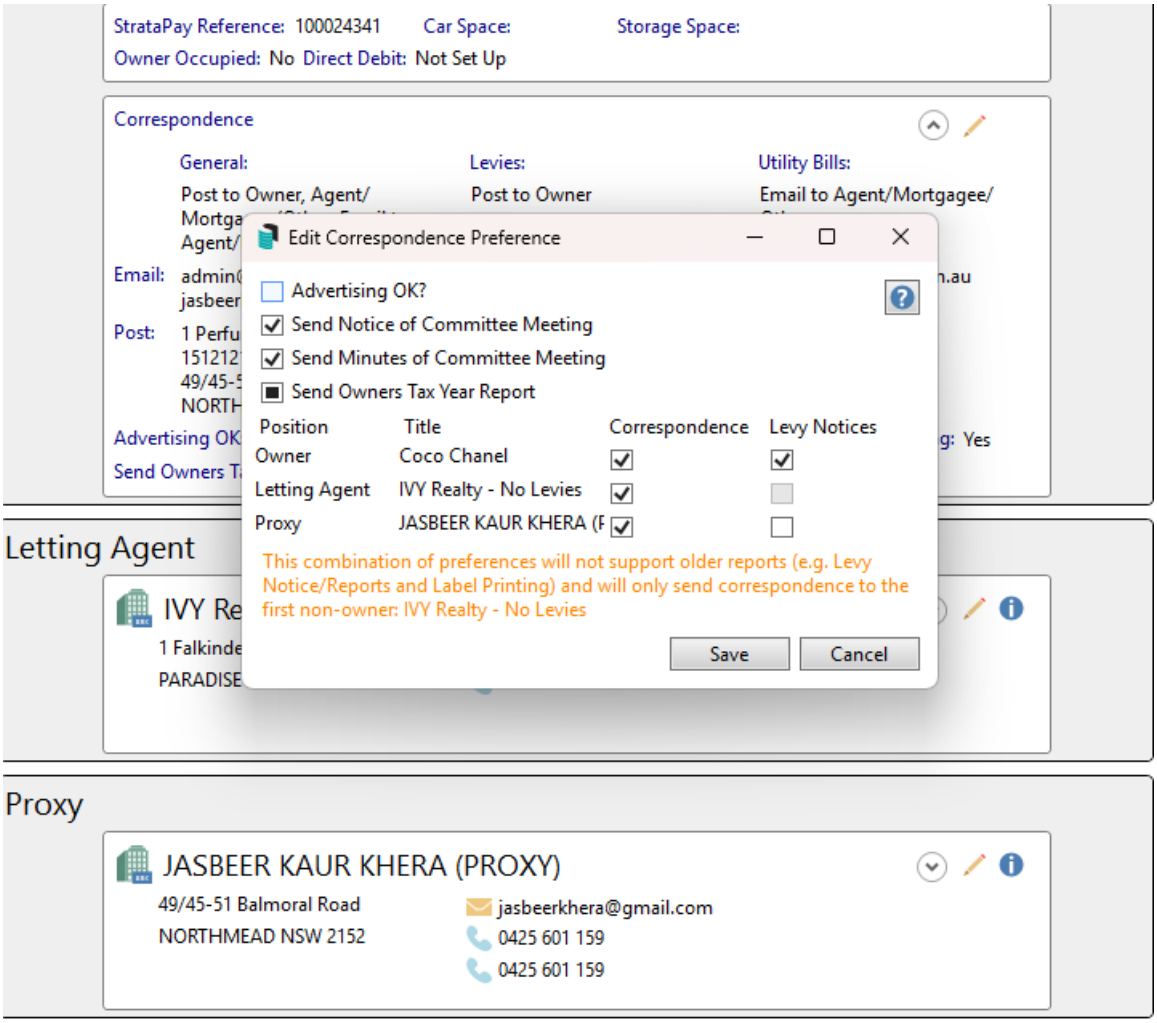
according to their contact preference.



Notices will not be sent to multiple contacts with the same address (email or post).

Q. How do the correspondence preferences in the ***Roll*** behave with agents and Sub-Groups? For example, sending levies and utility bills to the agent via email.
A. Add the agent to the lot account and configure the contact preferences for 'Send Levy Notice to Agent, Mortgagee or Other' and select the agent.

Q. How do we now send levies to the Owner (by post or email) and correspondence to the agent / other, or vice versa?
A. The Roll should include the contact for the agent / other type and be set to receive the correspondence. This can be done using the pencil icon and setting the contact to receive the required type.



Future Enhancements

Q. How are overseas addresses and additional character requirement's handled?
A. Limited field length still exists for addresses, which will be developed to be removed in future releases.

Q. We have a building that includes lot and unit number fields that are longer than the standard field character length, is this an area that will be extended?
A. Yes, lot and unit numbers will look to be developed to extend as further improvements are made to these areas.