# Roll | Data Links

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With individual contact cards now existing, there are few instances in which data links should be considered for linking Roll data. Data links are used to connect any sub-group accounts to corresponding accounts in the main building OR for a multi OC (VIC) type building via a main contact link. This ensures that any owner name and address details are updated in the sub-group (water, air-conditioning, electricity or by-laws) at the same time as they are updated in the main building or the same Roll information across buildings.

Considerations for Data Links using contacts:

- **Contact Management** should be used to clean contacts to ensure that duplicate contacts are removed, allowing the one contact card to be used for managing **Roll** data.
- Roll Address and contact details will not update for linked lots if separate contact cards are used between the linked lots.
- Removing Data Links from buildings where the Ownership is the same contact card should be actioned.
- Only consider Data Links when completing a Sub-Group or Multi OC (VIC) setup.
- Contact Preferences will not update across linked roll lots and are available to manage on an individual basis.
- Do not link lot accounts if they are not owned by the same person.

# Data Links Flags

The Lot account will flag like the below to confirm that the Roll data is linked.

📄 Roll - O	CEANCIA 250122	_		×
<u>F</u> ile <u>G</u> o	To <u>R</u> eports <u>S</u> pecial			
Lot: 021	00002 Multiple 1 & Mutiple 2 Owner + + Lots: 35 Building: OCEANCIA	250	122 🔻	0
Lot				<u> </u>
	Lot: 2 Unit: 2 Plan: 220125 Entitlements 50.0000 Lot Address: 2/Location (1), Location (2), Location	n (3)		
	Linked			
	Account Balance: 11250.00 Admin Paid To: 31/12/21 Sink Paid To: 31/12/21 Interest Debit Date:	0		

In Owner Info, a Linked icon (red square with yellow writing) will appear next to the Full Name field.

Owner Information STRATAMAX O	ONLINE HELP 11 06th August 2020	- 🗆 X
File Options Help		
Account Code 02100020 Refere	ence Name T Collins	Change Building
Eull Name	Contact	Account Status
Full Name	Linked Contact Home:	Account Status Account Balance: 4066.69
Full Name		
T Collins	Linked Home:	Account Balance: 4066.69 Admin Paid to: 31/03/19

*Debtor Maintenance*, in the Sub-Group when a debtor has been linked to the main Roll it will be flagged like the below.

Pebtor Maintenance - 38 RIV	then, i advect		_		×
Search				Q	0
02100001			2	/ X	٦ ^
Line (NSA) PAUL JULIE 1/ 38 Rin Robina,	NE	Linked to a	another lot	0	
<					> ~
Count: 43	Log	Data Links	Add New	Close	

### Data Link Fields

The following information is updated when a change of details is actioned for a linked lot.

- Date of receipt of notice
- Date Acquired
- Car Space
- Storage Space

- Is Owner Occupied Flag
- Roll Notes field
- Comments
- Linked Document
- Updating of Contact Card Details (only to debtors as owners should be using the same contact card)
- Adding of any additional roll type contacts
- Correspondence Preference for Corro and or levies to be sent to an Agent, Mortgagee or Other
- Advertising OK
- Send Notice and Send Minutes of Committee Meeting

# **Changing Ownership and Data Links**

If there is a data link between two or more lot accounts and one of these lots is now owned in a different name, the newly acquired lot account should be unlinked to allow the new ownership to apply. If there is a sub group within the building and the billing is applied to owners, this should be considered first before unlinking the accounts. The yellow warning 'linked' is displayed in the *Lot* area when data linked to another account.

- 1. Search or select *Roll*. In the Account Code List, select the relevant lot and click *OK*.
- 2. In the Roll screen, click *Change Ownership* button.
- 3. Refer to the existing contact information and from the Action drop down, make a selection.
  - Ignore: Keep the data link in place.
  - **Remove Link:** Remove the data link.
  - **Apply Change:** Applies the new owner details to the linked account once the change is processed (recommended)
- 4. Click Next to begin the change of ownership process.

Roll Change of Ownership	_		×
Data Links			?
These are Data Links for this lot. Do you want these to be stay linked and change ownership to the new owner?			
OCEANCIA 250122			
Account: 02100015 Jess Developer			
OCEANCIA E250122 Account: 02100015 Jess Developer Action: Remove Link V Ignore Remove Link Apply Change			
Back	Next	Can	cel

# Add a single Data Link

- 1. Search or select *Roll* and select the lot from the lot selection screen.
- 2. Click the Data Links button at the bottom of the Roll screen.
- 3. Within the 'Data Links' window, click the Add button in the bottom right.
- 4. In the 'Building Selection' screen, locate and select the building and click Select.
  - If linking to a Sub-Group building, expand the Filters and use the 'Sub-Group' drop-down to select the required type.

Building Sele	ction						_		×
BCMax Building	gs Recent Buildings			Nar	me / Numb	er: E			
<ul> <li>Filters</li> </ul>	Utilities Buildings								
Sub-Group:	Utilities	• 🔒 🗙	Accou	unt Manager:			•		
Inactive/Lost:	<ul> <li>Active</li> <li>Inactive</li> </ul>	e/Lost	Mana	gement Offic	e:		•		
State:		• 🔒 🗙	GST R	legistered:	⊖ Yes	⊖ No		×	
Financial End N	Nonth:	• ×	Invoic	e Hub:	⊖ Yes	O No		×	
			Accou	unt Groups:	⊖ Yes	⊖ No		×	
Number	Name	Yea	ir Start	Year End	Account N	lanager			
Number E3	Name 38			Year End 31/03/2024	Account N	lanager			
Number		01/0	04/2023		Account N	lanager			
E3	38	01/0	0 <mark>4/2023</mark> 02/2023	31/03/2024	Account N	lanager			
E3 E2	38 CA	01/0 01/0 01/0	04/2023 02/2023 07/2023	31/03/2024 31/01/2024	Account N	/lanager			
E3 E2 E1	38 CA DE	01// 01// 01// 01//	04/2023 02/2023 07/2023 01/2022	31/03/2024 31/01/2024 30/06/2024	Account N	/lanager			
E3 E2 E1 E5	38 CA DE GL	01/0 01/0 01/0 01/0 01/0 01/0	04/2023 02/2023 07/2023 01/2022 08/2023	31/03/2024 31/01/2024 30/06/2024 31/12/2022	Account N	/lanager			
E3 E2 E1 E5 E9	38 CA DE GL JES MA	01/0 01/0 01/0 01/0 01/0 01/0 01/0	04/2023 02/2023 07/2023 01/2022 08/2023	31/03/2024 31/01/2024 30/06/2024 31/12/2022 31/07/2024	Account N	/anager		Ca	ount

5. In the 'Account Code List' screen, tag the lot/s that need to be linked, then click *OK*. If the names are different, a warning prompt will appear. Click *OK* if ready to link.

Add data	link	×
	Warning: For link to account 02100001 the account name doesn't match ((NSA) PAUL , JULIE vs ORIGINAL OWNER)	
	OK Cancel	

- 6. Any selected lots will now appear in the 'Data Links' screen.
- 7. Click Close, and in the Roll screen there will be a yellow notification in the 'Lot' section saying 'Linked'.

### View Data Links

This displays any existing data links within the building.

- 1. Search or select *Roll* and select any lot in the lot selection screen.
- 2. Click the Data Links button at the bottom of the Roll screen.
- 3. In the 'Data Links' window, tick the Show All box.
- 4. Any existing links in the building will now be displayed in the screen.

e	cted Account Code	02100002 ORIGINA	AL O	WNER				🗸	Show All
	Building Number	Building Name		Group	Account Code	Description	Lot	Unit	
	399	38 RIV	E		02100001	ORIG	1	1	$\boldsymbol{\times}$
	E39	38 RIV	E	Utilities	02100001	(NSA ANNE	1	1	$\boldsymbol{\times}$
	399	38 RIV	E		02100002	ORIG	2	2	$\boldsymbol{\times}$
	E39	38 RIV	E	Utilities	02100003	FILM	3	3	$\boldsymbol{\times}$

#### **Remove Data Links**

This should be done prior to processing a *Change of Ownership* on a lot that is part of a link. It can also be completed as a separate action with the below steps where required.

- 1. Search or select Roll, and in the lot selections screen, select the lot and click OK.
- 2. Click the Data Links at the bottom of the Roll screen.
- In the 'Data Links' window, the existing linked lots will be displayed with the 'Master' link in the Main building at the top , noted with a yellow star in the left hand column. This cannot be deleted and only lots beneath this one can be.
- 4. Click the Delete (red 'X') button next to the required linked lot.

2	Data Links							_		×
Sele	ected Account Code	02100001 ORIGINAL OV	VNER						Show A	AII 🕜
	Building Number	Building Name	Group	Account Code	Description	Lot	Unit			
×	39917	38 RIVERWALK AVENUE		02100001	ORIGINAL OWNER	1	1	×		
	E39917	38 RIVERWALK AVENUE	Utilities	02100001	(NSA) PAUL BANJAC, JULIE ANNE	1	1	$\mathbf{X}$	4	
	- Add Close									

- 5. Click Yes when prompted.
- 6. Click Close to close the 'Data Links' screen.

#### Data Links Between Records in Main Roll

Any established data links from a main group to another property's main group should be replaced using the contact card methodology. First, identify which properties and lots that have been linked.

1. Unlink the Roll data as per the steps above.

- 2. Ensure same contact card is used on both lots (so that the same owner information is maintained across any lots that this contact card is selected for)
- 3. Review the delivery preferences and any agents/ other contact types on each as they are set individually per lot account.