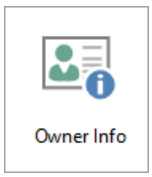
Owner Info

Last Modified on 23/09/2026 2:03 pm AEST



The instructions in this article relate to ***Owner Info.*** The icon may be located on the *StrataMax Desktop* or found using the *StrataMax Search*.

Owner Info | Overview

This section provides an overview of the ***Owner Info*** screen, covering each section with a red header. This screen allows quick access to a lot of the common information that is useful for a Strata Manager to know at a glance.

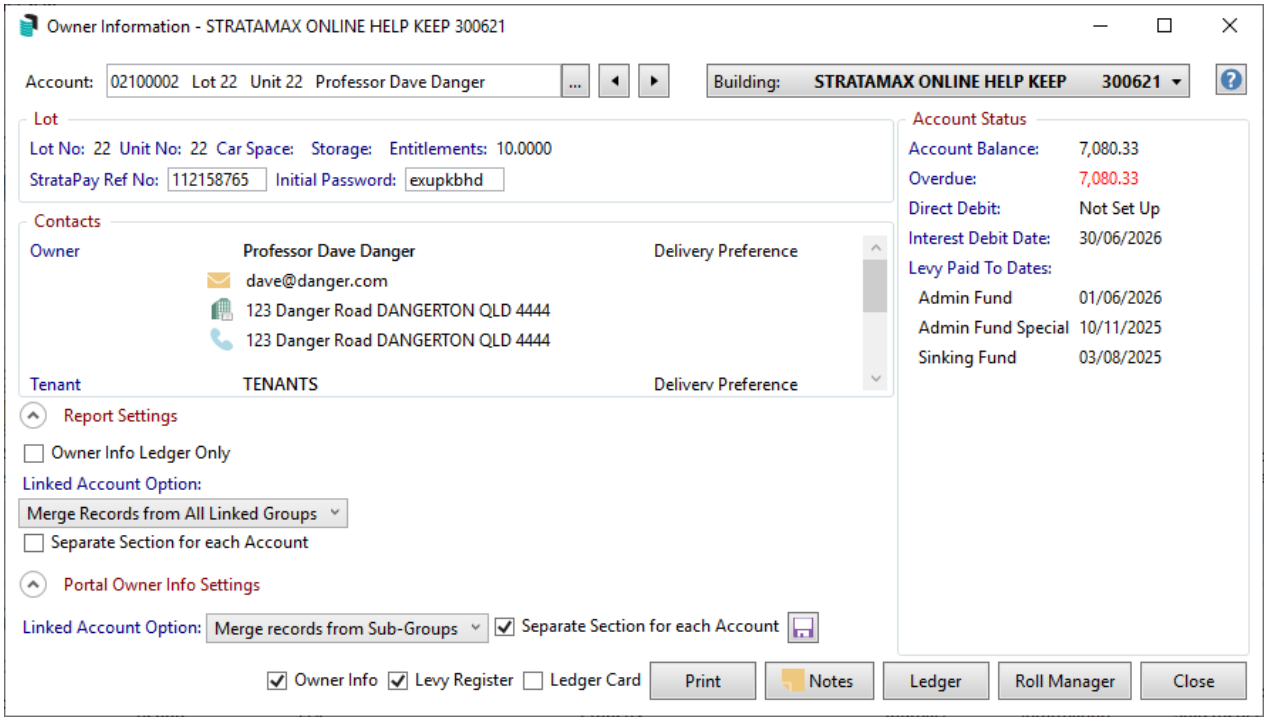
When the Owner Info screen is initially opened, it defaults to displaying the first lot in the building. Use the ellipsis button to open the lot selector window to select a different lot or use the arrow buttons to toggle between the lots.

Use the Building Selector drop-down to select a different building.

Lot

The Lot area contains basic information about the lot.

- Lot, Unit, Car Space, etc.
- Entitlements.
- StrataPay Ref No & Initial Password.
- Linked To: If there is a ***Data Link*** in place this is noted in the Lot area.



Contacts

Contains the details of the contacts associated with the lot, including tenants, agents, etc.

Report Settings

Report Settings for the selected lot can be adjusted here and saved for future reporting.

Owner Info Ledger Only: Print a summary of owner information along with the ledger of the lot. There are also selections in the Linked Account Option drop-down menu:

- Report only Main Group**:** Shows information for this lot account from the Main Group only.
- Merge records from Sub-Groups: Shows information for this lot and all linked Sub Groups accounts.
- Merge Records from this Group Only:Shows information for this lot and all linked accounts in this Group only.
- Merge Records from All Linked Groups: Shows information for this lot and all linked accounts in all Groups.

Separate Section for Each Account: It is recommended to tick this box when selecting any of the above options, as it will separate each linked account for easier viewing.

Portal Owner Info Settings

This section is used to format the reports on the *Owner Portal* when the *Owner Reports* are configured and uploaded.

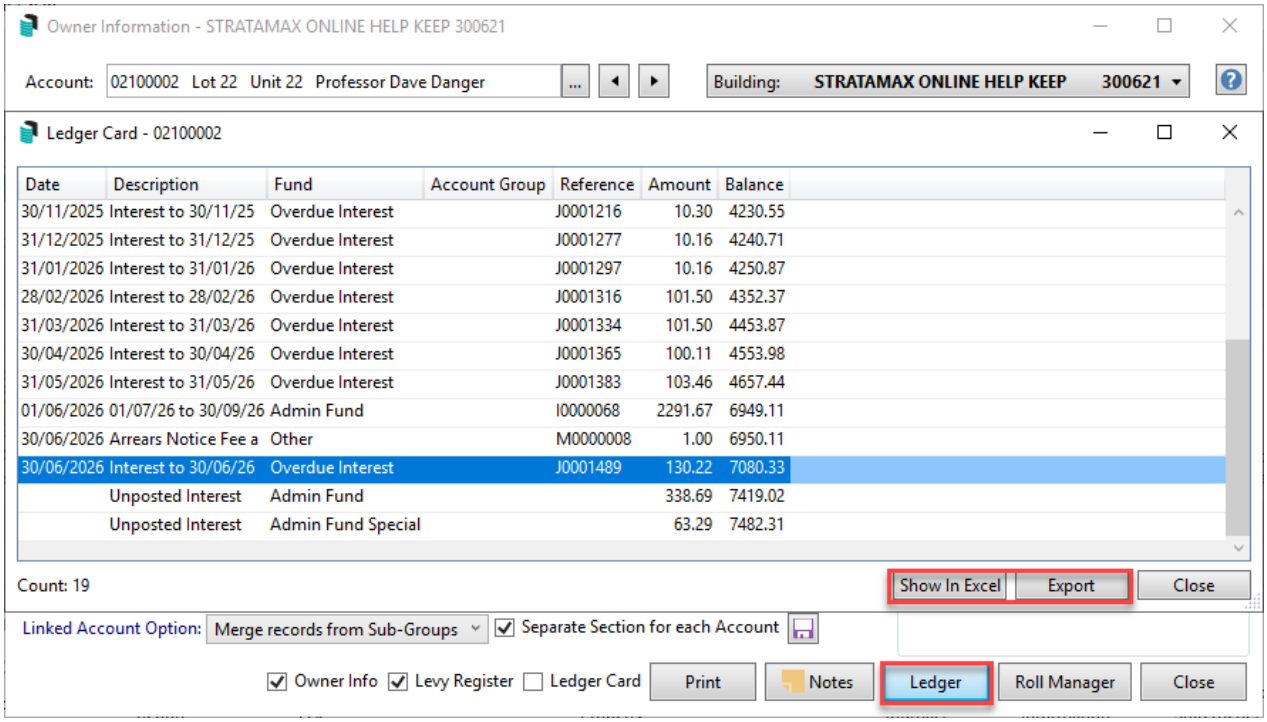
Notes

Open the *Notes* menu for this lot, where existing notes can be viewed, edited, or deleted, and new notes

can be added.

Ledger

Opens a window with the ledger transactions for the selected lot, for the current year. Click the*Show in Excel* button to open the ledger in Excel or use the*Export* button to export the ledger card data to a .txt. file.



Roll Manager

Opens the ***Roll***.

Print

Review the tick boxes next to *Print* to configure the reports. Select at least one report to be printed or select multiple:

- *Owner Info:* Select to print the Owner Information displayed on the screen and the transaction ledger for the selected Lot.
- *Levy Register:* Print the Levy Register for the selected Lot.
- *Ledger Card:* Print the Ledger Card including a deposit slip for payment

Account Status

Account Balance: The overall balance of the lot account, including all funds, interest, and arrears fees.

Admin Paid To: The date that the Admin Fund levy has been paid up until for this lot. Logically, in most cases, the next levy period would start the next day.

Sinking Paid To: The date that the Sinking/Capital Works/Maintenance Fund levy has been paid up until for this lot. Logically, in most cases, the next levy period would start the next day.

Direct Debit: If details appear here, this means the owner has contacted *StrataPay* and initiated their *Direct Debit* facility. The *Strata Manager* will receive a notification email from StrataPay. There are 3 types of *Direct Debits*:

1. Client Initiated - the payers reference number and account details are held on our system; however payments are only made when initiated by the payer. Notification can be made by telephone or internet. We will need to be instructed to make a payment of a set amount, together with any service charges which may apply, on a set date.
2. Fixed - the payer sets a fixed payment amount, together with any service charges which may apply, to be debited from their nominated account either weekly, fortnightly, monthly, quarterly or half yearly intervals beginning on a specified date, and continuing until the finish date specified or until further notice.
3. Auto - any amount due on the payers account as advised by the biller, together with any service charges which may apply, will be drawn from the payers nominated account or card up to 5 business days prior to those levies or other charges becoming due on the account.

Interest Debit Date: The last date that interested was debited on this lot account.

Additional information may also display if an lot is:

- in Legal Action or a Payment Plan. See ourLegal Action Process article.
- linked to another lot or lot in a different building. See the***Data Links*** article for more info.
- setup as a split lot. See the *Split Levy Setup* instructions for more info.