

# Manager Maintenance

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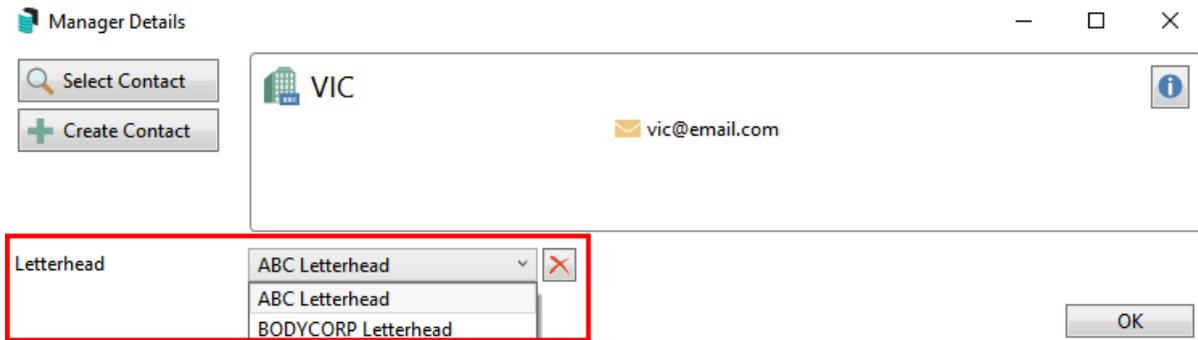


The instructions in this article relate to **Manager Maintenance**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

**Manager Maintenance** is where you add or change the details of the Body Corp. Manager/Strata Manager. In StrataMax the Strata Manager can be set up and selected for each building. This is generally set up at the time of install, but you may need to change details, or the company name may have changed.

## Manager Maintenance | Multiple Management Offices

**Manager Maintenance** provides the facility to set up multiple Management Offices and set specific letterheads for each office if required. If a specific letterhead is selected when adding the Body Corporate Manager contact, the letterhead will be used for any building the Body Corporate Manager has been selected in.



## Add New Manager | Create Contact

1. Search or select **Manager Maintenance** and click the *Add Manager* button.
2. In the *Manager Details* screen click the *Create Contact* button and the *Contact Details* window will appear.
3. Change the *Type* drop-down menu to *Company*.

The screenshot shows a window titled 'Contact Details'. It contains several input fields: 'Title', 'Type', 'Reference Name', and a checkbox for 'Surname first'. The 'Type' dropdown menu is open, displaying three options: 'Individual', 'Individual', and 'Company'. A red circle with the number '3' is positioned over the first 'Individual' option. A mouse cursor is pointing at the 'Company' option.

4. Type the company's name into the *Title* field at the top. The *Title* is required and must be entered in order to save the contact.
5. Add the *Reference Name* if required.
6. The *Address* and *Letter Title* fields are not required, but these will be used displayed on correspondences.
7. Enter an ABN and/or ACN if required. Both fields are validated.
8. Click the **green plus** button to add the *Postal Address*, *Phone Number*, and *Email Address*.
  - Up to three different postal addresses can be added:
    - *Residential/Business* is used in the **Roll** menu for correspondence and levies.
    - *Service of Notice* is used in the **Label Printing** menu.
    - *Levy Notice* is used in the **Roll** for correspondence and levies.
  - Additional phone numbers and email addresses can be added by simply clicking the **green plus** button.
  - To delete them, click the **red minus** button.
  - If a duplicate email address is found in another contact, a notification icon will appear.
9. The contact's *Bank Account* details can be optionally added here as well. However, these are currently not linked to any other areas of StrataMax.
10. Under the *Delivery Preferences* section, tick the required box to send *Correspondence* and *Levy Notices* via post and/or email.
11. Click the *Save* button, then *Close* to close the *Contact Details* screen.

**Contact Details**

Title **4** Committee Co.

Type Company

**Alternate Titles**

Reference Name **5** Committee Co.

Address Title (1) Committee Co.

Address Title (2) **6** Committee Co.

Letter Title Committee Co.

**7** Australian Business Number 33051775556

Australian Company Number 051 775 556

**Postal Address** **8**

1 Committee Street Residential/Business A

BRISBANE QLD 4000

**Phone**

07 1234 9876 Business

**Email Address**

test@committee.com.au

**Bank Account**

**9** Branch BSB Account Number

CBA 123-987 987654321

**Delivery Preferences**

**10** Correspondence  Send by post  Send by email

Levy Notice  Send by post  Send by email

Utility Bill  Send by post  Send by email

**11** Cancel Save

12. Back in the *Manager Details* screen, click the *Letterhead* drop-down menu to select a letterhead, then click *OK* to close the *Manager Details* screen.
13. In the *Manager Maintenance* screen, click *Save*.

## Add New Manager | Select Contact

1. Search or select **Manager Maintenance** and click the *Add Manager* button.
2. In the *Manager Details* screen click the *Select Contact* button and the *Contact Selection* window will appear.
3. Use the *Search* field to locate the contact.
4. Click the required contact, then the *Select* button.
  - You can optionally the blue *Info* button to view the details of the contact, and also edit them as well.

- If the contact doesn't exist, you can click the *Create Contact* button to create a new contact (see the *Add New Manager | Create Contact* section above).
- 5. Back in the *Manager Details* screen, click the *Letterhead* drop-down menu to select a letterhead, then click *OK* to close the *Manager Details* screen.
- 6. In the *Manager Maintenance* screen, click *Save*.

## Edit Existing Manager Name (Name Change)

The below steps can be applied if a Name Change has been registered and recorded with our Support Team to update the Office Bearer throughout StrataMax:

1. Search or select ***Manager Maintenance***.
  2. Highlight the Body Corp. Manager Name to be changed and click on the pencil icon to edit.
  3. In the *Manager Details* screen click the *Create Contact* button and the *Contact Details* window will appear.
  4. Change the *Type* drop-down menu to *Company*.
  5. Type the company's name into the *Title* field at the top. The *Title* is required and must be entered in order to save the contact. Fill in all required details, click *Ok*.
  6. In the *Manager Maintenance* screen, click *Save*.
  7. Spot check a number of buildings in ***Office Bearers*** to ensure the Body Corp. Manager details have updated as required.
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