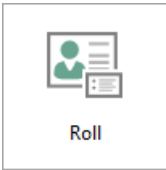


Roll | Contacts

Last Modified on 03/06/2024 10:36 am AEST



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

The **Roll** is used to manage lot owner information, which includes changes of ownership and changes to details. This article details this menu's most recent features and functions, including how to add new contacts and edit them. A contact is associated with records throughout the system. The same contact can be linked to different screens and menus, such as the **Roll** and **Office Bearers**. In addition, multiple contacts can be linked to a single lot.

Edit contact validation has been changed to allow:

- Full change of *Given* or *Surname* fields on initial creation of the contact.
- Small edits to *Given* or *Surname* fields at the same time after initial save.
- Full change to *Given* or *Surname* fields if the other is not changed.

For an overview of the **Roll**, including configurations, see [Roll | Configuration and Overview](#).

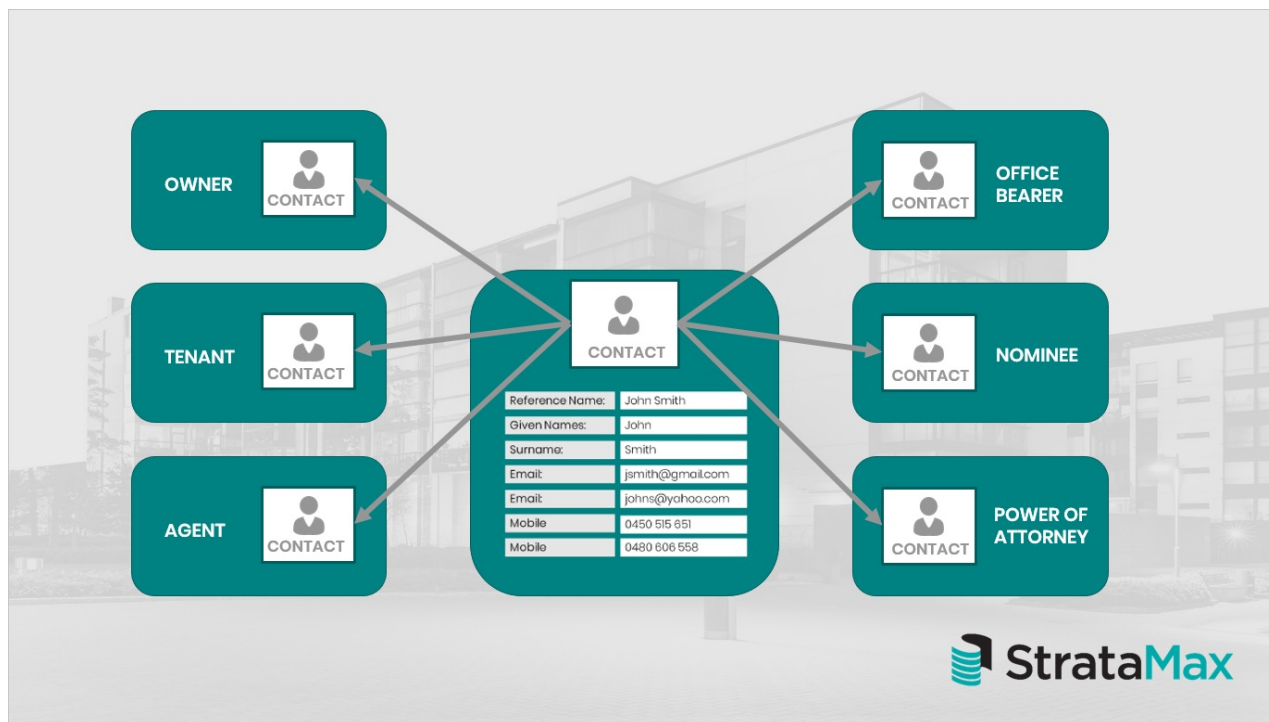
Roll & Contact Management Video

What is a Contact?

A contact is a person or company that can be "inserted" into various appropriate screens in StrataMax - the obvious two being an owner in the **Roll** and a committee member in the **Office Bearers** screens. In addition, the **Roll** allows you to insert multiple contacts into a single lot. Contacts are not limited to owners or office bearers; they can also be letting agents, nominees, tenants, etc.

A contact exists in its own right and is displayed in multiple areas throughout the system. When a change is made to a contact card, there is no need to update or synchronise the change, as all applicable areas throughout StrataMax are pointing to the one contact card. So if the contact has been inserted as an owner in the **Roll** and a Secretary in **Office Bearers**, if the contact details are modified, then the modified will be visible in both areas, regardless of where the contact card was edited.

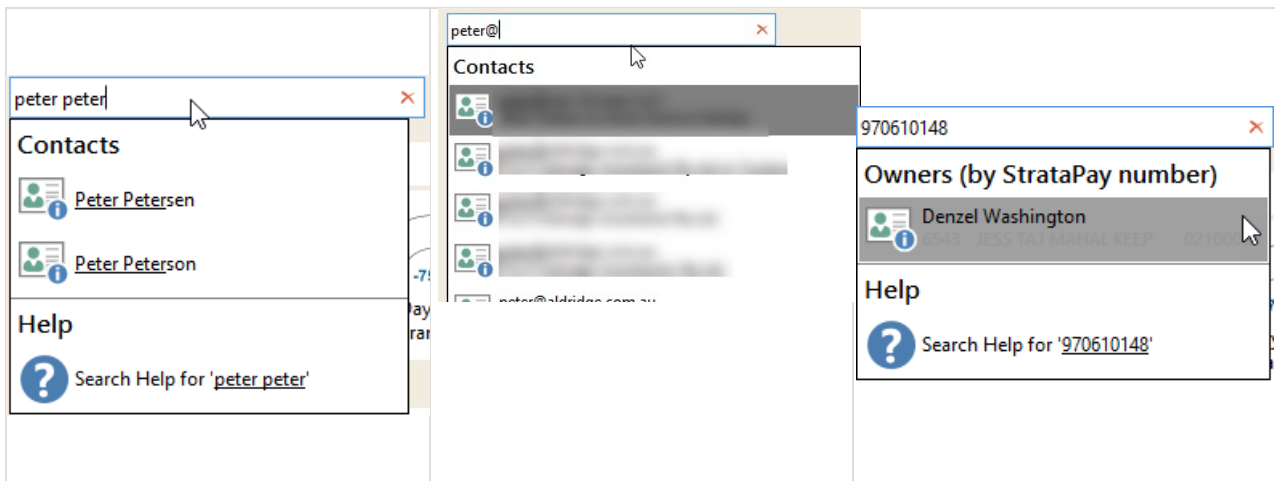
This simple diagram should illustrate how a contact works and is displayed across areas in StrataMax.



Quick Search for Owners

Finding an Owner can now be done simply using the [StrataMax Search bar](#). Using any of these noted contacts, you can find an owner quickly in single or for clients using multi drives (and if the record can be located in another drive, it will open in that drive directly):

- Name of Owner
- Email contact
- StrataPay Reference Number (in full)
- Lot Address



Quick Reference Guide

This section is a quick guide to changing ownership of a lot and updating the details of a contact of a lot. If you are unfamiliar with the **Roll** screen, we recommend reviewing the rest of this article and the [Roll Configuration and Overview](#) article. We also highly recommend watching the [Roll and Contact Management Video](#).

QRG Change of Ownership

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. In the Roll screen, click the *Change Ownership* button.
3. If there is more than one Contact on the lot, you will be prompted to select if this is:
 - Normal change of ownership.
 - Deceased/Divorce (This will keep the existing StrataPay number, and requires at least 1 of the existing Contacts to remain an owner).
4. Review and enter the *Acquired* (date of purchase) and *Date of Receipt of Notice* (date of when the change was applied).
5. Click *Select Contact* to select an existing contact or *Create Contact* to create a new contact. For more than one owner, repeat the *Select Contact* or *Create Contact* to add each one.
6. Review the contact preferences set and select appropriately. If there is an email address to be included, these can be set for its specific purpose. Enter the email address and ensure the selection is set for the desired purpose has been set.
 - 'Work Orders', 'Utility Billing', and 'Remittance Advice' are not owner contact preferences that can be specifically set.

Roll Change Details - STRATAMAX ONLINE HELP KEEP 300621

Ownership Details

Date of Receipt of Notice: 15/02/2024 Time: 11:43 Acquired: 15/02/2024

Car Space Number Storage Space Number Is Owner Occupied

Notes:

Comments:

Document:

Contact Details

Name Edward Eggs Surname first

Title Given Names Edward Surname Eggs

Type Individual

Reference Name E

Address Title (1) Edward Eggs

Address Title (2)

Letter Title Edward Eggs

Australian Business Number

Postal Address

2116/20 Stuart St Residential/Business

TWEED HEADS NSW 2485

Phone

Email Address

ed@eggs.com

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

7. Click *Finish*.

8. If there are any *report sets* configured for distribution, these will be available in the *Report Distribution* window, with the new owner pre-tagged. Click *Proceed* to send these reports to the Owner.

QRG Change of Details

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.

2. Within the required contact area: *Owner, Real Estate Agent, Tenant etc.*, click the pencil icon to edit the contact information.
3. The date of receipt of the notice will populate with the current date and time. Amend the contact information as needed or update the contact preferences. If there is an email address to be included, these can be set for its specific purpose. Enter the email address and ensure the selection is set for the desired purpose has been set.
4. Click *Save*.
5. If there are any *report sets* configured for distribution, these will be available in the *Report Distribution* window, with the change of detail owner pre-tagged. Click *Proceed* to send these reports to the Owner.

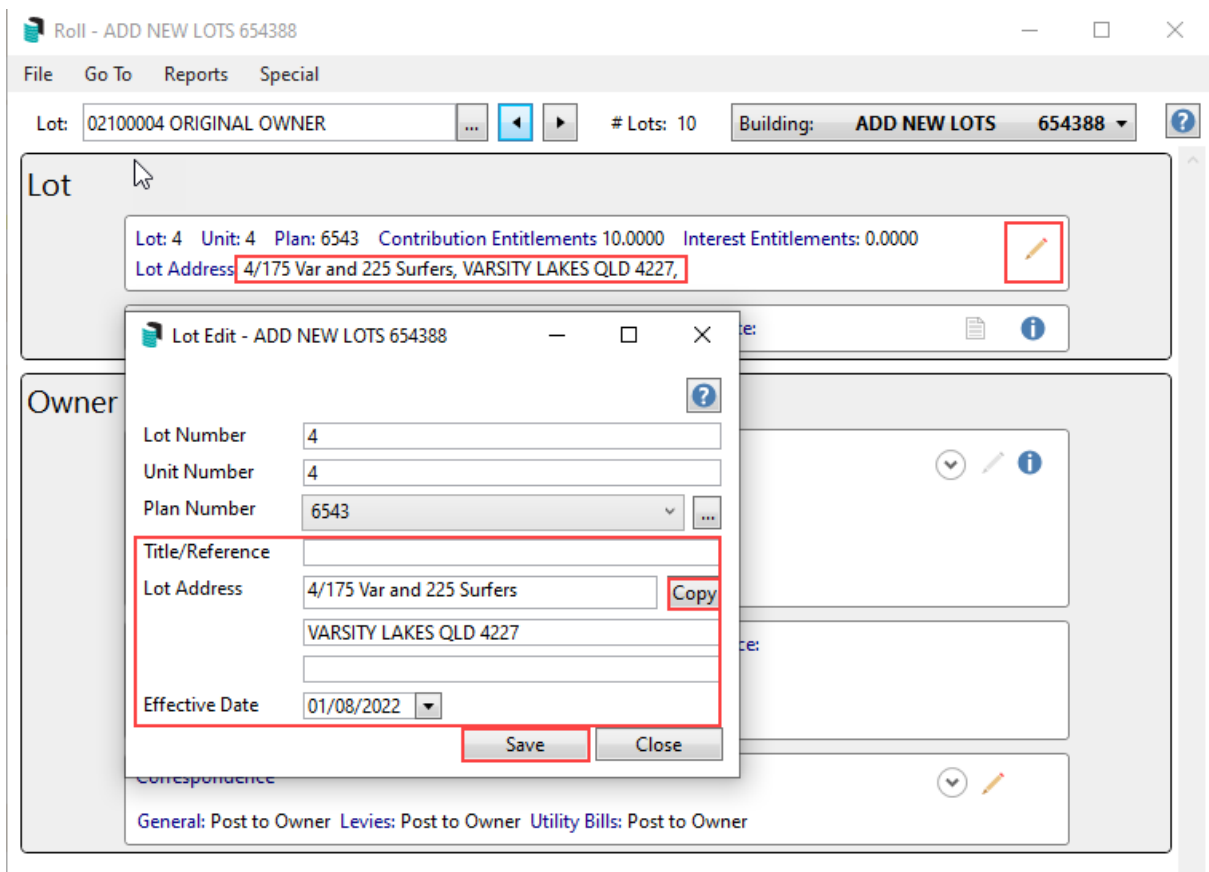
Lot Address Editor

If a property has the same unit numbers but different street names, the Lot Address & Title Editor can be configured. The first time this area is accessed, the address details will automatically populate from **Building Information** > Location 1-3 plus postcode into the lot address. It is recommended to review the data entered in these fields first to ensure it is correct before opening the lot address editor.

This area can also assist with the Tenant or Resident address for mailouts as well as changing plan numbers in buildings that may contain multiple. A typical example where this can occur is when the lots in a building are resubdivided.

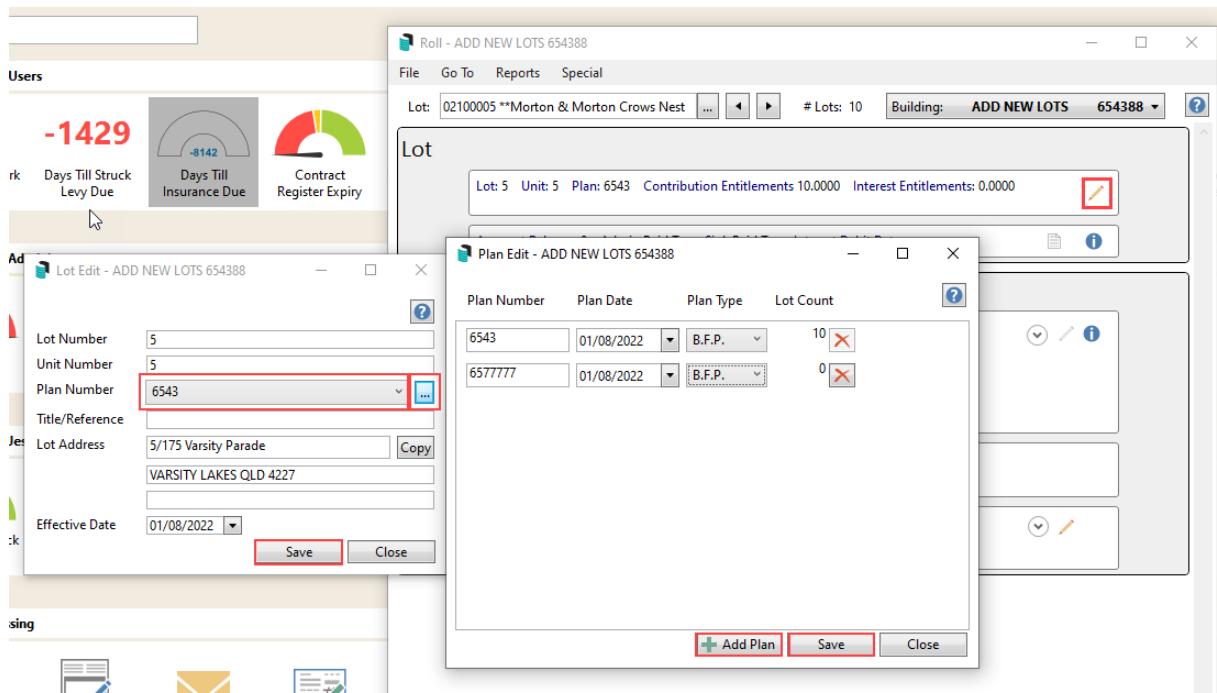
Lot Address / Title Reference / Effective Date

1. Search or select **Roll**. Select a lot account.
2. Within the **Lot** area, select the pencil icon to edit the lot address.
3. The unit number will be inserted based on the lot number field and update the street address based on the Building Information addresses. 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 information for the *Title/ Reference* requires population, these will need to 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. Click *Save*.



Plan Number

1. Search or select **Roll**.
2. Refer to the registration documentation and select the first lot with the differing plan number. Click the ... button to add to the information.
3. Within the **Lot** area, select the pencil icon to edit the lot address.
4. The plan number initially available will be populated from **Building Information**.
5. Click + Add Plan, complete the *Plan Number and Date*, and select the *Plan Type*. Click Save.
6. From the *Plan Number* drop-down list, select the corresponding plan number for that lot. Click Save.



Change of Ownership

This section covers the different methods of changing ownership of a lot. A contact is associated with records throughout the system. The same contact can be added to different areas, such as the Roll and Office Bearers, and multiple contacts can be linked to a single lot. If the same Owner contact exists in instances where different address or email information is required, a contact for each will be required.

When changing ownership, if any other contacts are associated with the lot account, there will be prompts to keep or remove this information.

If there are any automated reports set to distribute as per the change of detail or change of ownership roll reports, these will also be included.

Roll - OCEANCIA 250122

File Go To Reports Special

Lot: 02100010 Carrie Bridgestone # Lots: 30 Building: OCEANCIA 250122

Lot

Lot: 10 Unit: 10 Plan: 220125 Entitlements 50.0000
 Lot Address: 10/Location (1), Location (2), Location (3)

Account Balance: 7500.00 Admin Paid To: 31/12/21 Sink Paid To: 31/12/21
 Interest Debit Date:

Owner

Carrie Bridgestone
 2 / 24 Test Drive
 Stateborough
 NSW 2444
 cfisher@imail.com

StrataPay Reference: 972026889 Car Space: Storage Space:
 Owner Occupied: No Direct Debit: Not Set Up

Correspondence

General: Post to Owner; Email to Owner Levies: Post to Owner; Email to Owner
 Utility Bills: Post to Owner; Email to Owner

Real Estate Agent

**Ray White City South
 Level 3, S 44E, 650 George St1
 SYDNEY NSW 2000
 citysouth.nsw@raywhite
 02 9289 8988
 02 9289 8989

Show Retired / Terminated Positions **Change Ownership** Add View History Data Links Notes Close

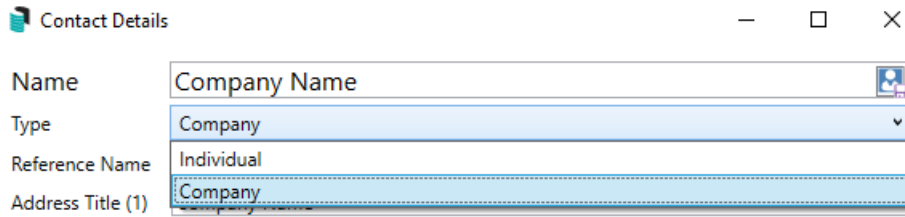
Please note: If another person purchases a share in a Lot, the Change of Ownership process is required to ensure the timeline of ownership is recorded for the lot.

Create Contact

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. In the Roll screen, click the *Change Ownership* button.
3. If there is more than one Contact on the lot, you will be prompted to select if this is:
 - Normal change of ownership.
 - Deceased/Divorce (This will keep the existing StrataPay number and requires at least 1 of the existing Contacts to remain an owner).
4. Review the *Acquired and Date of Receipt of Notice* date and enter. If a car or storage space is associated,

enter this information, and if known, select *Is Owner Occupied*.

5. Click the *Create Contact* button, and the *Contact Details* window will appear.
6. The *Reference Name*, *Address Title (1)*, and *(2)* (based on character length) fields will update automatically after entering the *Title*, *Given Names* and *Surname* (red outlines indicate this).
 - Tick the *Surname first* box to display the surname first in *Name* and other fields.
 - Use the 'switch' button (two blue arrows) to swap the contents of the *Given Names* and *Surname* fields.
7. Change the *Type* to either 'Individual' or 'Company.'



8. If a 'Company' was selected, you can enter an ABN and/or ACN if required. Both fields are validated.
9. Click the **green plus** button to add the *Postal Address*, *Phone Number*, and *Email Address*.
 - This can be assigned to its specific purpose if entering an email address. For example, use a specific email address for Levies, Correspondence, or Invoice Hub. A separate email can be recorded for each type if needed. If all details should be sent to one email address, this should not be changed.
 - Additional phone numbers and email addresses can be added by clicking the **green plus** button.
 - To delete them, click the **red minus** button.
 - A notification icon will appear if a duplicate email address is found in another contact.
10. If an email address is entered, the delivery preferences can be set for post or email where required.
 - **Correspondence** refers to **Merge Letters**, **Meeting Hub** documentation, **Label Printing (Debtors)**, **and** the *Service of Notice* address field. If blank, the *Residential/ Business* address is used.
 - **Levy Notice** - this refers to **Levy Notices**, **Arrears Notices**, **Invoice Printing** and **Label Printing (Debtors)**
 - **Utility Bill** - If a sub-group is associated with the contact, this area can be set and will include the *Utility Billing* preference. If this is not linked to the Main Group, the contact preference can be set for each **Debtor Maintenance** record, and the article on how to complete this is available [here](#).
11. 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.
12. Click the *Save* button to add the contact.
13. If additional contacts exist, click *Create Contact* and add the information noted above. If multiple contacts exist on the lot account, review the combined ownership information (*Combined Owner*) *Name* and adjust to office standards as needed.
14. Click *Finish* to close the *Roll Change of Ownership* screen.
15. If there are any [report sets](#) configured for distribution, these will be available in the Report Distribution window, with the new owner pre-tagged. Click *Proceed* to send these reports to the Owner.

Select Contact

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. In the Roll screen, click the *Change Ownership* button.
3. If there is more than one Contact on the lot, you will be prompted to select if this is:
 - Normal change of ownership.
 - Deceased/Divorce (This will keep the existing StrataPay number and requires at least 1 of the existing Contacts to remain an owner).
4. Review and enter the *Acquired* (date of purchase) and *Date of Receipt of Notice* (date of when the change was applied). If a car or storage space is associated, enter this information, and if known, select *Is Owner Occupied*.
5. Click *Select Contact* and search to see if the contact already exists in the portfolio.
6. Click *Finish*.
7. If there are additional contacts to be added to the lot, click *Select Contact* to select an existing or *Create Contact* to create a new contact.
8. If there are any [report sets](#) configured for distribution, these will be available in the Report Distribution window, with the new owner pre-tagged. Click *Proceed* to send these reports to the Owner.

Combined Owner Name

If there are multiple Contacts attached to a lot in the **Roll**, a *(Combined Owner) Name*, *Reference Name*, *Address Title (1)* and *Address Title (2)* and *Letter Title* will be created. These fields can be adjusted to suit office formatting when completing a [Change of Ownership](#) or a [Change of Details](#) in the **Roll**.

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. In the Roll screen, click the pencil icon to complete a [Change of Details](#) to access the *(Combined Owner) Name* and combined ownership information or adjust the combined ownership information at the Change of Ownership stage when selecting *Change Ownership* button following the [Change of Ownership](#) process.

Roll Change Details - STRATAMAX ONLINE HELP KEEP 300621

Ownership Details

Date of Receipt of Notice: 23/01/2024 Time: 08:26 Acquired: 23/01/2024

Car Space Number Storage Space Number Is Owner Occupied

Notes:

Use these names when dealing with the combined ownership:

(Combined Owner) Name

Reference Name Letter Title

Address Title (1) Address Title (2)

Individual

Comments:

Document:

Contact Details

Roll Change of Ownership

New Owners

Select the owner(s) contacts for the new ownership

Date of Receipt of Notice: 26/02/2024 Time: 15:28 Acquired: 26/02/2024

Car Space #: Storage Space #: Notes: Is Owner Occupied

Use these names when dealing with the combined ownership:

(Combined Owner) Name

Reference Name Letter Title

Address Title (1) Address Title (2)

Lady Mandy Marbles - i

1 Marble Road ✉ corres@marbles.com.au ☎ 041238765

MARBVILLE NSW 4444 ✉ levies@marbles.com.au

✉ utilities@marbles.com.au

Ms Sharron Stewart - i

22 Wunulla Road ✉ ladyshar.stewart@gmail.com

POINT PIPER NSW 2027 ☎ 0412 549 898

Change of Ownership - Deceased/Divorce

There is an option to keep some of the original owners due to a Deceased/Divorced ownership change. If there are two or more Contacts on a lot and a Change of Ownership is completed, you will be prompted to select which Contact to retain, which will also keep the StrataPay Reference Number.

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. If there is more than one Contact on the lot, you will be prompted if this is a:
 - Normal change of ownership.

- Deceased/Divorce (This will keep the existing StrataPay number, and requires at least 1 of the existing members to remain an owner).
4. Review the *Acquired and Date of Receipt of Notice* date and enter. If there is a car or storage space associated enter this information and if known, select *Is Owner Occupied*.
 5. Click *Select Contact* and select from the original owners which Contact is to remain with the lot.
 6. Review information and click Finish.
 7. Print any Roll Distribution reports and *Close*.
 - The Roll record will be updated with the selected Contact and the StrataPay References will not have changed.

Roll Change of Ownership

Change of Ownership

Special Options

Normal change of ownership

Deceased/Divorce This will keep the existing StrataPay number, and requires at least 1 of the existing members to remain an owner


Back Next Cancel




Change of Details

If there are changes that need to be made on an existing contact associated to a lot, complete the following. If this is the method used for editing the contact, there will be no prompt or warning to confirm where else this record may be used or updated in. For warnings and prompts before proceeding on the edit, please see this [article here](#). When editing a contact card that was created based on upgrade from the previous roll it is recommended to populate the Given Names and Surname fields.

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. Within the relevant area, there are two ways of updating the contact:
 - Click the pencil icon to edit the contact information. This method will include the date of receipt of notice and allow documents to be included in the change of detail.
 - Click the blue 'i' icon to view and edit the contact information without the date of receipt of notice or document inclusion. This option will also not include the Owner Reports for automated distribution.



Owner

 AAA AAA
175 Varisty Parade
VARSITY LAKES QLD 4217

Change of Details

StrataPay Reference: 972027681 Car Space: Storage Space:
Owner Occupied: No Direct Debit: Not Set Up

Correspondence  

General: Post to Owner Levies: Post to Owner Utility Bills: Post to Owner

3. If you clicked the blue 'i' icon you will need to click the *Edit* button at the bottom of the screen and then edit the contact card with the additional information, using the green 'plus' buttons to add further additional fields where needed, or the red 'minus' button to remove unwanted fields. If editing using the pencil icon, complete the *Date of Receipt of Notice* field and *Select* any document attachment if needed.

Roll Change Details - OCEANIA KEEP 101023

Ownership Details

Date of Receipt of Notice: 01/07/2023 Time: 00:00 Acquired: 01/07/2023

Car Space Number Storage Space Number Is Owner Occupied

Notes:

Comments:

Document:

Contact Details

Name Original Owner Surname first

Title Given Names Original Surname Owner

Type Individual

Reference Name Original Owner

Address Title (1) Original Owner

Address Title (2)

Letter Title Original Owner

Postal Address

Address Info Residential/Business

Phone

Email Address

Bank Account

BSB Branch Account Number

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

4. Click 'Save' to update the contact card.
5. If there are any *report sets* configured for distribution, these will be available in the *Report Distribution* window, with the change of detail owner pre-tagged. Click *Proceed* to send these reports to the Owner.

Adding Other Contact Cards to a Lot

To add another contact type, the below instructions will assist. Add Entitled Person, Nominee, Power of Attorney, Tenant, Real Estate Agent, and Other Person records to a lot account (based on State). Each contact type will offer different fields to add, and each available will be added with the same *Add* button.

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. Click *Add* and select the type of contact required.
3. Complete the fields required for the contact type selected and *Select* in the document area to attach any supporting document.
4. Click *Select Contact* to select an existing contact or *Create Contact* to create a new contact.
5. If this person is to receive any documents, reports or notices, select *Receive Owner Correspondence* and or *Receive Owner Levy Notices* to include this agent to receive each respective communication type. These are the only two types that can be set to receive owner communication.

Roll - OCEANIA KEEP 101023

Letting Agent

Date of Receipt of Notice: 05/10/2023 Time: 17:05

Date of Appointment: 05/10/2023

Date Withdrawn:

Comments:

Document: View Select

Receive Owner Correspondence

Receive Owner Levy Notices

Name: Professional Agent

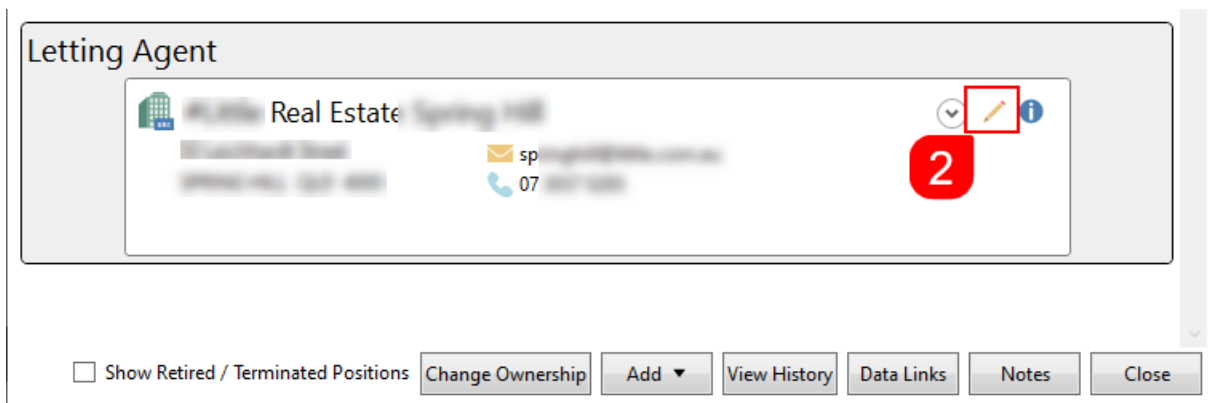
6. Click *Save* to add the contact to the selected lot account.
7. Select *Confirm* if there is a message to confirm that this contact card holds multiple positions.

Removing other Contact Card from a lot

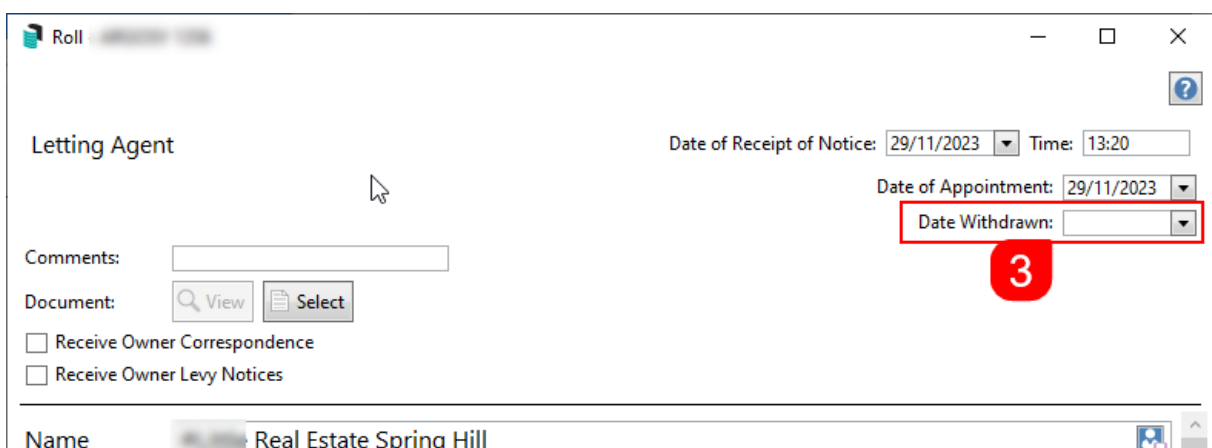
If the contact is no longer associated with the lot account, the contact can be retired, withdrawn, or terminated, depending on the type of contact.

Once the termination/withdrawn/retirement date has been entered, you can still review and edit the contacts details by clicking the 'Show Retired / Terminated Positions' box in the bottom left of the **Roll** screen.

1. Search or select **Roll**. In the *Account Code List*, select the required lot and click *OK*.
2. In the relevant contact type, click the *pencil* icon.



3. In the top right of the contact screen, select the *Date of Retirement / Date of Termination / Date Withdrawn* (based on the contact type).



4. Click Save.

Changing Ownership with other contact cards included

If there are any other contact cards included on the lot account, excluding the Owner this record will need review before the current change of ownership can be applied. The below instructions refer to a Real Estate Agent included on the Lot before the change of ownership, and similar screens will be included for Tenant, Agent and Mortgage Types.

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. In the Roll screen, click the *Change Ownership* button.
3. Refer to the existing contact information and tick *Keep Letting Agents* (or whichever type is relevant).
4. Click *Next* to begin the change of ownership process.

Roll Change of Ownership

Tenant / Agent


These are the existing roll positions. Do you want any of these to stay with the new ownership?


Keep Letting Agents


Real Estate Agent

OCEANCIA 250122 Account: 02100014

Date of Appointment: 07/03/2022

 #Professionals Surfers Paradise

 @professionals.com.au

SURFERS PARADISE QLD 4217  07

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 subgroup 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 is 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 ▼

Ignore

Remove Link

Apply Change

Change Ownership and the StrataMax Portal

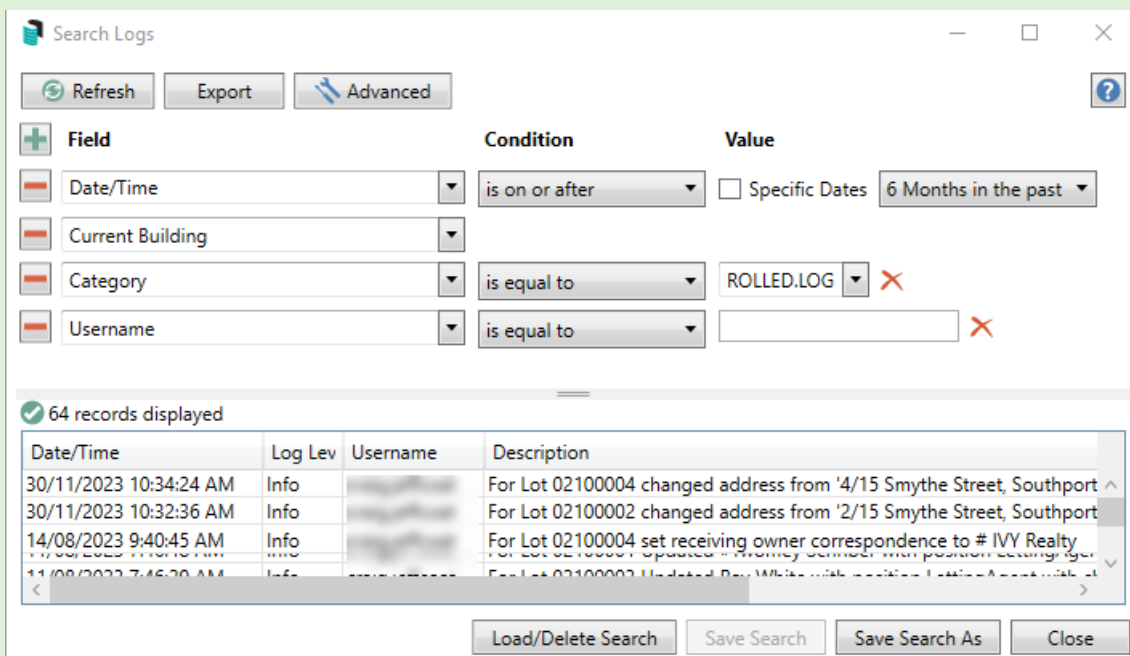
With a change of ownership; access to the StrataMax Portal will be disabled for the owners that have sold the lot. The new owners will be able to create a portal account or add the new lot to their already established portal account. Instructions for owners on managing their portal account is available [here](#).

If the owner selling the lot is an Office Bearer the change of ownership will prompt the user about resigning the Office Bearer record. If the owner owns multiple lots and the lot being sold is setup as the Office Bearer record (Office Bearer Owner of Lot field) however the owner is remaining as an office bearer it is recommended to change the Owner of Lot field to a lot they still own. That lot will then be the lot that has Committee Report access on the portal.

View History

With each change of ownership or change of detail applied to a lot account, there is a history entry created. This can be viewed and is available since the creation of the lot account. The first screen will provide single line information as to the change included and for a further log including time and date stamp and user information, this is available via the *Change Log* button.

To review more detailed changes made to the **Roll** across the entire building, or even multiple buildings, you can use the **Log Viewer**. The **Category** needed to see changes in the **Roll** is called 'ROLLED.LOG'.



The screenshot shows a 'Search Logs' window with the following search criteria:

Field	Condition	Value
Date/Time	is on or after	<input type="checkbox"/> Specific Dates 6 Months in the past
Current Building		
Category	is equal to	ROLLED.LOG
Username	is equal to	

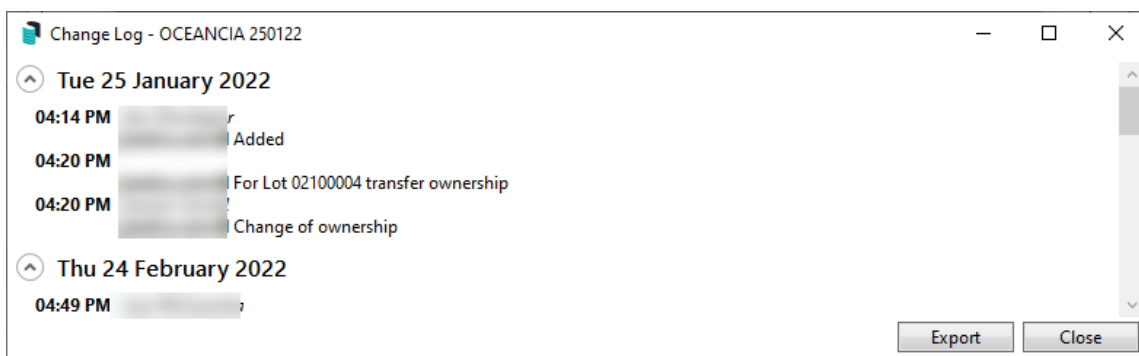
64 records displayed

Date/Time	Log Lev	Username	Description
30/11/2023 10:34:24 AM	Info		For Lot 02100004 changed address from '4/15 Smythe Street, Southport
30/11/2023 10:32:36 AM	Info		For Lot 02100002 changed address from '2/15 Smythe Street, Southport
14/08/2023 9:40:45 AM	Info		For Lot 02100004 set receiving owner correspondence to # IVY Realty
11/08/2023 7:46:30 AM	Info		For Lot 02100002 Updated Prop. With with position. Lotting Area with at

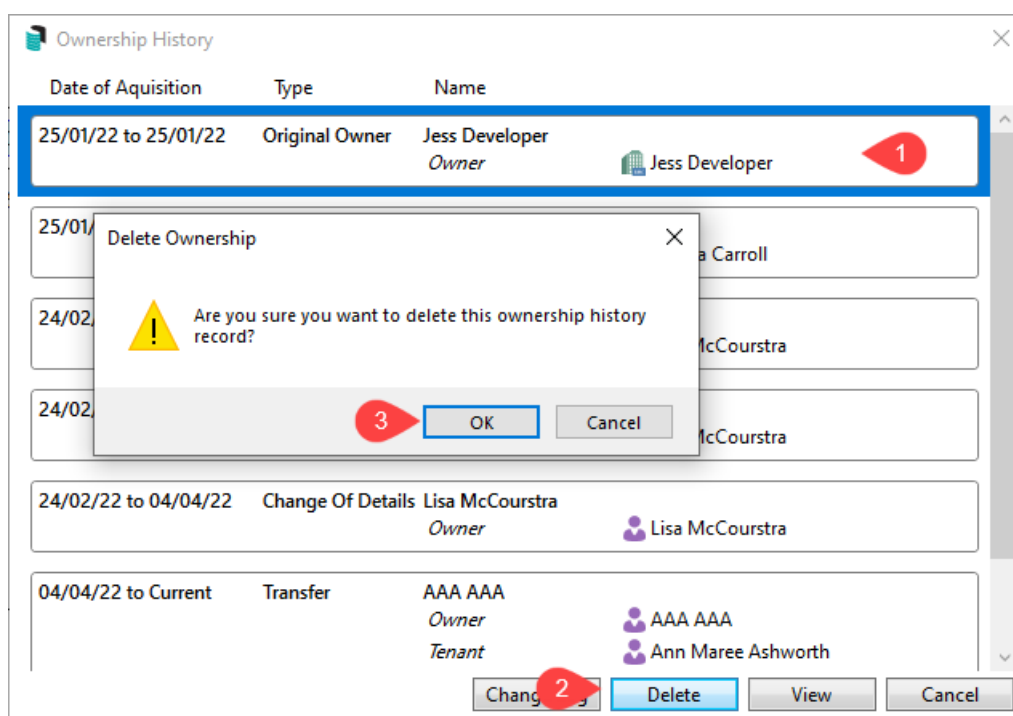
Buttons at the bottom: Load/Delete Search, Save Search, Save Search As, Close

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. Click *View History* to view the ownership history including changes of ownership and change of details.

- **Change Log:** Will provide the detailed change log information with a time, date stamp and user entry. This can be exported to Excel.



- **Delete:** (if user has permission) Will allow the current ownership to be deleted from the selected lot account.



- **View:** Selecting a past history record and clicking View will allow for the roll to display this information.

Lot

Lot: 4 Unit: 4 Plan: 220125 Entitlements 50.0000 Lot Address: 4/Location (1), Location (2), Location (3)

Account Balance: 7500.00 Admin Paid To: 31/12/21 Sink Paid To: 31/12/21
Interest Debit Date:

Viewing Ownership History - Date Appointed: 25/01/22

Owner

Jess Developer
Residential Address
jess.carroll@stratamax.com

StrataPay Reference: 972025666 Car Space: Storage Space:
Owner Occupied: No Direct Debit: Not Set Up

Correspondence
General: Post to Owner Levies: Post to Owner Utility Bills: Post to Owner

- **Cancel:** This will close the View History area.

Data Links

In the **Roll** any lot that is linked to another lot will have a yellow *Linked* icon. It is recommended to link to a Sub-Group type or a multi-OC (VIC) setup. Contacts are now used as the one record, and therefore, any updates to the one contact card will automatically update where the contact card is used. Please see this [article](#) for full instructions. Below is a quick reference guide on how to complete this process.

PLEASE NOTE: Contact preferences may need to be checked when agents have been applied to receive correspondence, levies or utility bills. Refer [here](#) for further information.

Lot

Lot: 1 Unit: 1 Plan: 6123 Entitlements 5.0000

Linked

Account Balance: 0 Admin Paid To: Sink Paid To: Interest Debit Date:

1. Search or select **Roll** and select the linked lot from the lot selection screen.
2. Click the *Data Links* button in the bottom of the screen.

In the Data Links window, the data that will be linked and copied can be viewed by clicking the Linked Data radio button, and scrolling through the table.

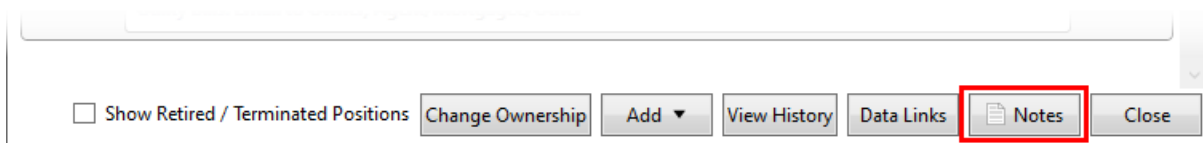
3. Within the *Data Links* window, click the *Add* button

4. In the *Select Sub-Group* window, select the building and click *OK*.
 - If linking to a lot in a different building, select the option '*Select from another building*' instead and select from building list.
5. In the *Account Code List*, tag all lots that need to be linked, then click *OK*.
6. If the names are different, a prompt will appear. Click *Yes* if ready to link.
7. Any selected lots will now appear in *Proposed Links* table. Click *Save* to finalise the process.
8. Click *Close*.

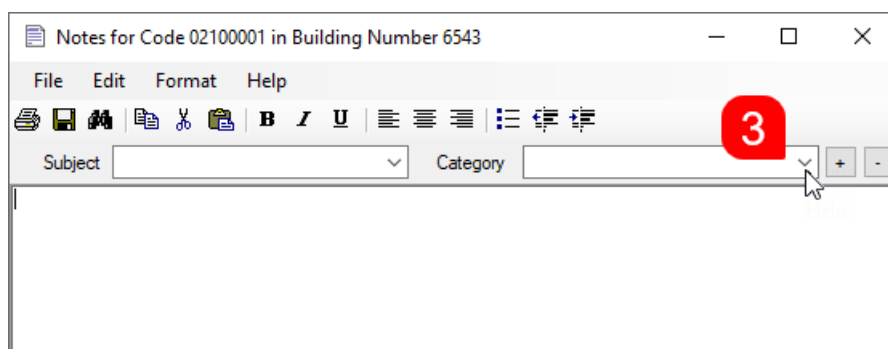
Notes

Notes on a lot account can be recorded for lot-specific information, and there are certain system processes that will record a note automatically. For example, Arrears and Certificates issued. This area can be used for reporting and is available via [Reports/ Utilities \(Global\)](#). For more information about Notes throughout StrataMax, see the [Notes](#) article.

1. Search or select **Roll**. In the Account Code List, select the relevant lot and click *OK*.
2. Click the *Notes* button at the bottom of the screen.



3. In the '*Notes*' window click the *Add* button and then window, select a category (this will assist with reporting).



4. Either type or copy and paste the note information and click the *Save* icon.
5. Click *Close* to close the notes window.

Notes can be edited by highlighting the relevant note and clicking *Edit Notes*.

Roll Fields explained with Levy Notice Address

The below outlines what will be displayed with the Roll Fields when applied to a levy notice and what is recommended when using the Name, Reference Name, Address Title (1) and (2) fields. The Address Title (2) field should be included when Address Title (1) exceeds the 30-character limit. The Letter Title field can be used in areas like [Merge Letters](#) and [Roll Details Confirmation](#).

Name Field:

The full name of the contact should be entered here.

Reference Name:

This field is limited to 30 characters and contains an abbreviated name. This field is displayed when selecting the **Roll** record list and is used when selecting from other various lists in StrataMax.

Address Title (1):

Includes the first portion of the Name within the 30-character limit.

Address Title (2):

Contains the remainder of the Name that did not fit in Address Title (1) or nothing if the name is less than 30 characters.

In the example where independent content is required, for example, a C/-Person, this should be considered to include either Address Title 1 or the Residential/ Business address detail as per the example below.

The screenshot shows a 'Contact Details' window with the following fields and values:

- Name:** Flinstone Partners Pty Ltd A.T.F Flinstone Family Trust
- Type:** Company
- Reference Name:** Flinstone Partners Pty Ltd
- Address Title (1):** Flinstone Partners Pty Ltd
- Address Title (2):** A.T.F Flinstone Family Trust
- Letter Title:** Dear Sir / Madam
- Australian Business Number:** (empty)
- Australian Company Number:** (empty)
- Postal Address:**
 - Address Line 1: C/- Frank Flinstone
 - Address Line 2: Bedrock Drive
 - Address Line 3: Bedrock
 - Address Type: Residential/Business

Levy Notice

PO Box 1234, Stratatown QLD 4999
TEL +61 7 1234 5678 | FAX +61 7 1234 5679 | EMAIL info@abcstrata.com.au



OWNERS CORPORATION FEE NOTICE

Owners Corporations Act 2006 Section 31, Owners Corporations Regulations 2018 and Owners Corporation Rules

DESCRIPTION OF FEE / CHARGE / INTEREST / ARREARS

TAX INVOICE

ABN 53 641 256 403

Flinstone Partners Pty Ltd A.T.F Flinstone Family Trust C/ - Frank Flinstone Bedrock Drive Bedrock
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Linked

Date of Notice	
03 June 2024	
Lot Number	8
Unit Number	8