Roll | Contacts

Last Modified on 13/02/2026 5:02 pm 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, including ownership changes and updates to details. This article details the latest features and functions of this menu, including how to add and edit contacts. 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 is allowed:

- Full change of the *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 the *Given* or *Surname* fields if the other is not changed.

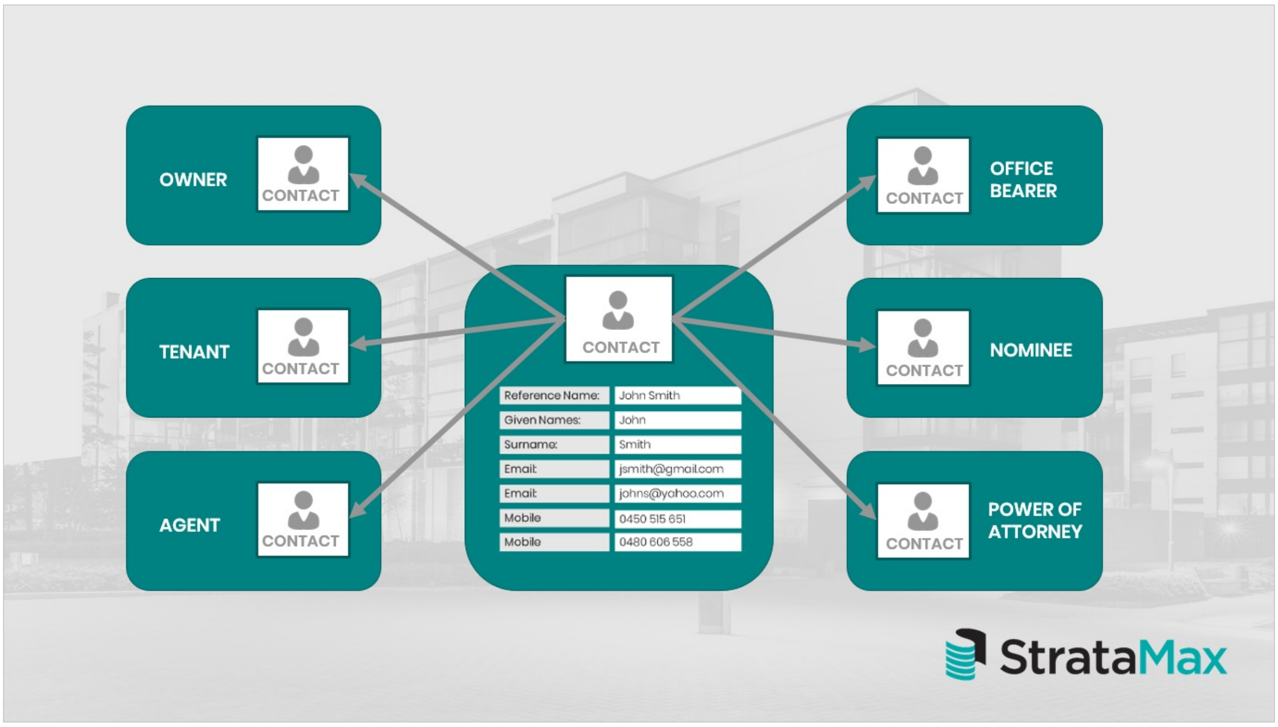
For an overview of the ***Roll,*** including configurations, see *Roll | Configuration and Overview*.

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 it, as all applicable areas within StrataMax reference the same contact card. If the contact has been added as an owner in the ***Roll*** and as a Secretary in ***Office Bearers***, and the contact details are modified, the changeswill be visible in both areas, regardless of where the contact card was edited.

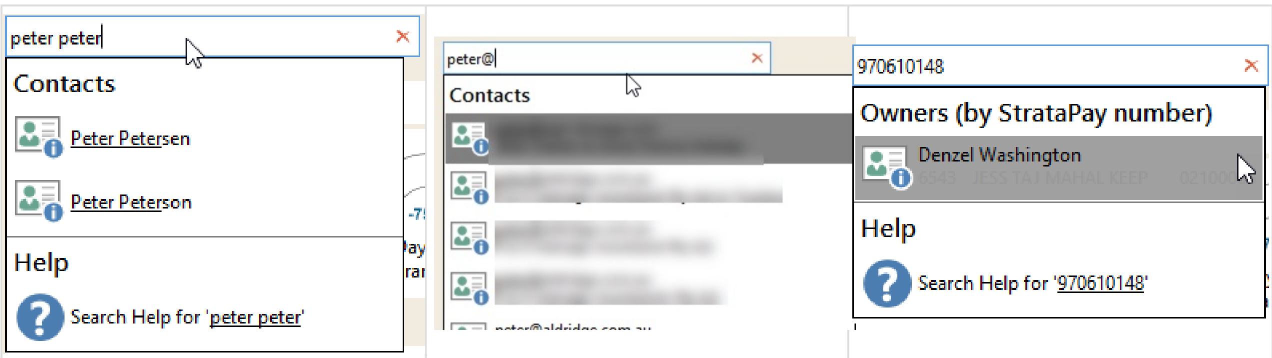
This simple diagram should illustrate how a contact works and is displayed across areas in StrataMax.



Quick Search for Owners

Finding an Owner can now be done simply using the*StrataMax Search bar*. Using any of the noted contacts, you can quickly find an owner, either for a single record or for clients with multiple drives (if the record is on another drive, it will open directly in that drive).

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

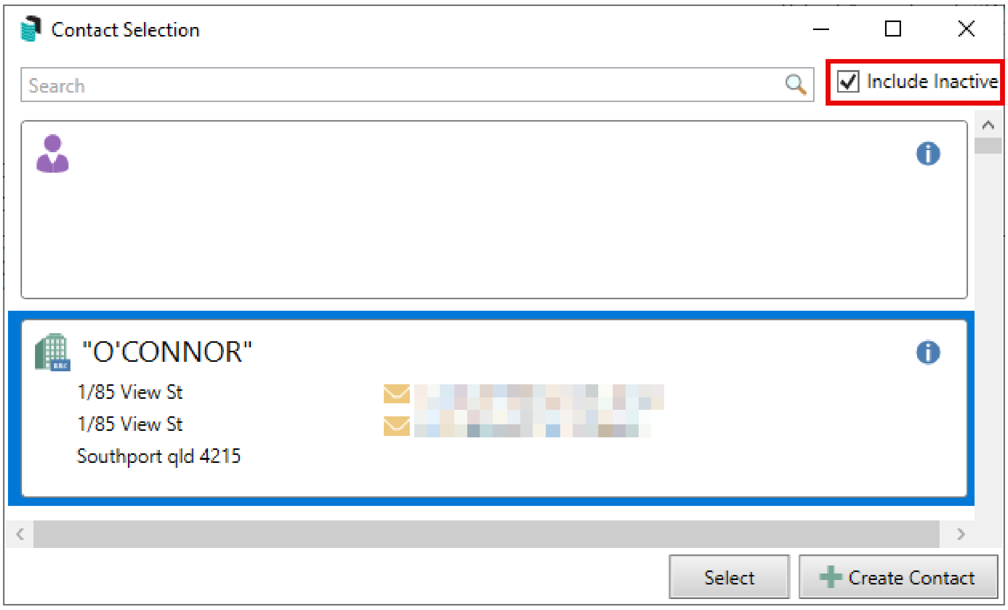


Quick Reference Guide;

This section is a quick guide to changing a lot's ownership and updating a lot's contact details. 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 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).
5. Click *Select Contact* to select an existing contact, use the *Search* field if necessary to locate the Contact by name, address, or the ABN or ACN can also be searched, to show inactive Contacts > *Select Contact* > *Include Inactive > Select*, or *Create Contact* to create a new contact. For more than one owner, repeat the *Select Contact* or *Create Contact* to add each one.

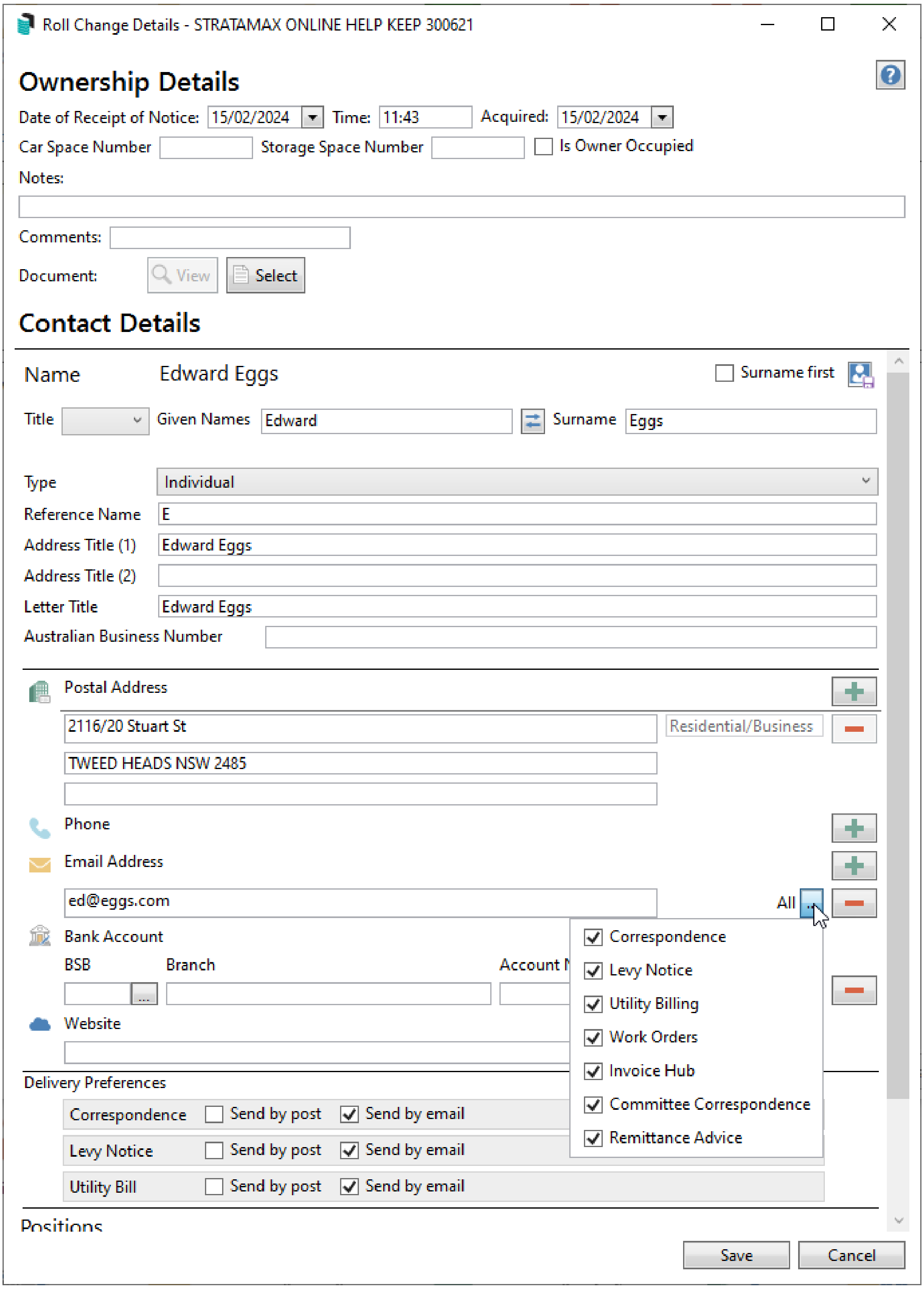


6. If entering a Postal Address, the automatic address lookup will automatically suggest and auto-populate an address for you.
    - Only Australian postal addresses are looked up. Overseas addresses can be typed in manually.
    - The address will be auto-populated in title case for the first line, and the Suburb and State will be in upper case.
    - Once the address has been selected, if the second line containing the Suburb, State, and

Postcode exceeds 30 characters, it will be split between Suburb and State.

- Addresses prefixed with ‘ATT’ will be ignored.
- **NOTE: Due to the limited number of characters (30) available on each line, the State and Postcode will move to the third line if 30 characters are exceeded on the second line.**

7. Review the contact preferences set and select appropriately. If an email address is to be included, it can be configured for a specific purpose. Enter the email address and ensure the selection is set for the desired purpose.
    - 'Work Orders', 'Utility Billing', and 'Remittance Advice' are not owner contact preferences that can be specifically set.



8. Click *Finish.*
9. If any *report sets* (welcome packs) are configured for distribution, they will appear in the *Report Distribution* window, with the new owner pre-tagged. Click *Proceed* to send these reports to the Owner.
10. If there are other types of contacts to be added to the lot, use the *Add* button and select the contact type.

QRG Change of Details

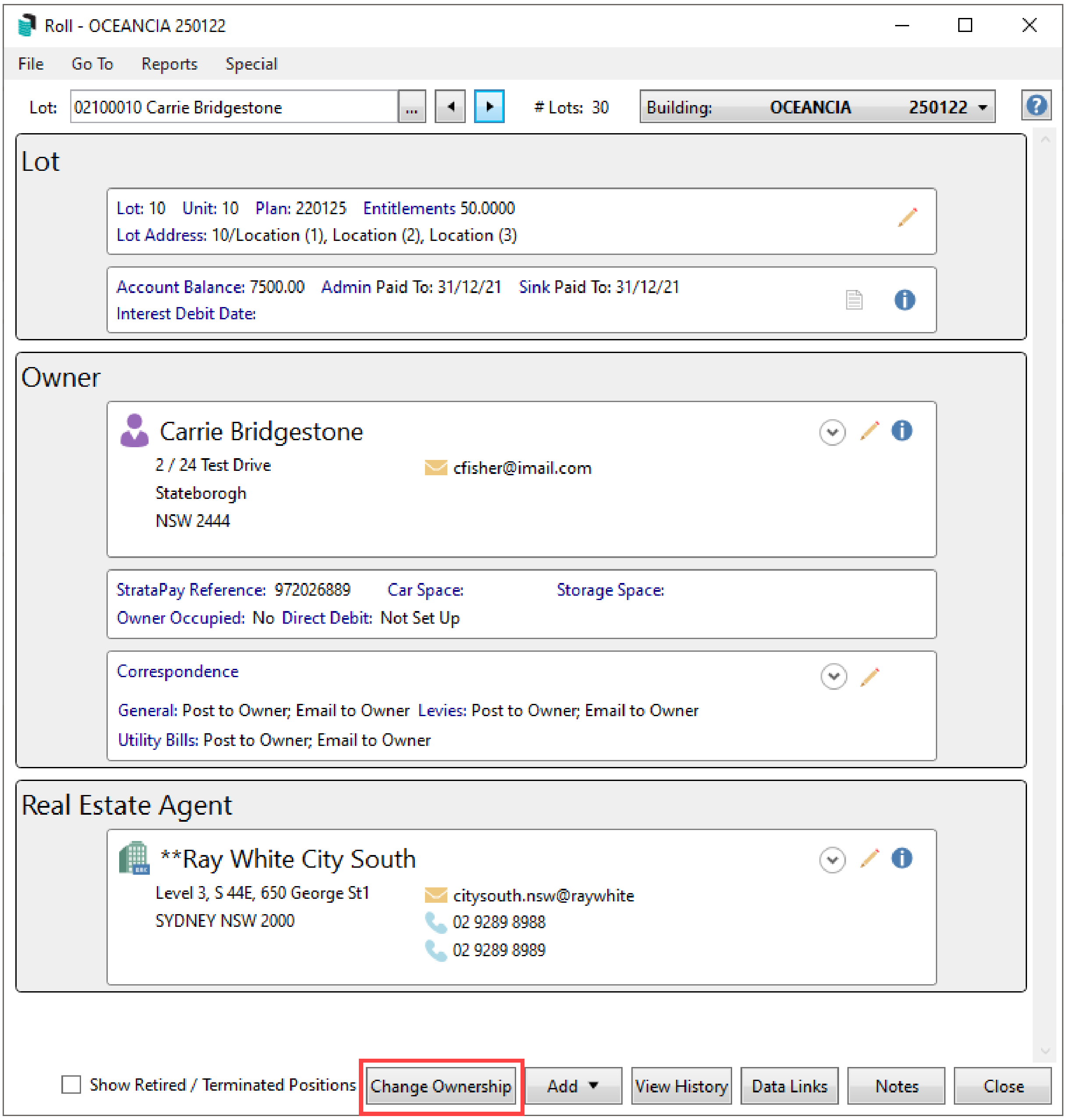
1. Search or select ***Roll***. In the Account Code List, select the relevant lot and click *OK.*
2. Within the required contact area: *Owner, Real Estate Agent, Tenant etc*, click the pencil icon to edit the contact information.
3. The date of receipt of the notice will populate with the current date and time. Amend the contact information as needed or update the contact preferences.
4. If entering a Postal Address, the automatic address lookup will automatically suggest and auto-populate an address for you.
    - Only Australian postal addresses are looked up. Overseas addresses can be typed in manually.
    - The address will be auto-populated in title case for the first line, and the Suburb and State will be in upper case.
    - Once the address has been selected, if the second line containing the Suburb, State, and Postcode exceeds 30 characters, it will be split between Suburb and State.
    - **NOTE: Due to the limited number of characters (30) available on each line, the State and Postcode will move to the third line if 30 characters are exceeded on the second line.**
5. If an email address is to be included, it can be configured for a specific purpose. Enter the email address and ensure the selection is set for the desired purpose.
6. Click *Save.*
7. If any *report sets are* configured for distribution, they 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.

Change of Ownership

This section covers the methods for transferring 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 separate contact will be required for each.

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

If any automated reports are set to distribute based on changes in detail or ownership, they will also be included.



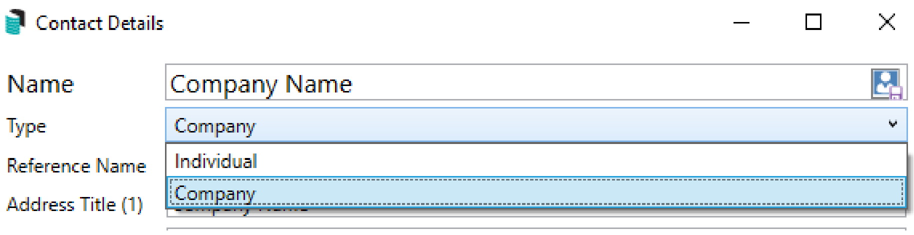
Please note: If another person purchases a share in a lot, the Change of Ownership process is required to ensure the ownership timeline is recorded for the lot.

Create Contact

- Search or select ***Roll***. In the Account Code List, select the relevant lot and click*OK.*
- In the Roll screen, click the *Change Ownership* button.
- 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).
- Review the *Acquired* date and enter. If a car or storage space is associated, enter this information,

and if known, select *Is Owner Occupied.* Notes can be entered if needed.

- Click the *Create Contact* button, and the *Contact Details* window will appear.
- 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.
  - Enter the full owners' names into the *Name* field and then abbreviate with Address Title 1 & 2. Validation exists on Address Title 1 & 2 fields,s so if this matches the full Name, Address Title 2 should be abbreviated.
- Change the *Type* to either 'Individual' or 'Company.'



- If a 'Company' was selected, you can enter an ABN and/or ACN if required. Both fields are validated.
- Click the **green plus** button to add the *Postal Address*, *Phone Number*, and *Email Address.*
  - This can be assigned to its specific purpose when 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.
- When entering a Postal Address, the automatic address lookup will automatically suggest and auto-populate an address for you.
  - Only Australian postal addresses are looked up. Overseas addresses can be typed in manually.
  - The address will be auto-populated in title case for the first line, and the Suburb and State will be in upper case. Once an address is selected, it will populate in the address fields, which can then be edited as required.
  - **NOTE: Due to the limited number of characters (30) available on each line, the Suburb will be populated to line 2, with the State and Postcode on line 3**
- If an email address is entered, the delivery preferences can be set for post or email, where required.
  - **Correspondence** refers to ***Merge Letters*** and ***Meeting Hub*** documentation.

    - **Levy Notice** - this refers to ***Levy Notices, Arrears Notices***, and ***Invoice Printing.***
    - **Utility Bill** - If a sub-group is associated with the contact, this field can be set to 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.
- The contact's *Bank Account* details can be added here as well. This will enable refunds and reimbursements if required.
- Click the *Save* button to add the contact.
- 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.
- Click *Finish* to close the *Roll Change of Ownership* screen.
- If any report sets are configured for distribution, they will appear in the Report Distribution window, with the new owner pre-tagged. Click *Proceed* to send these reports to the Owner.

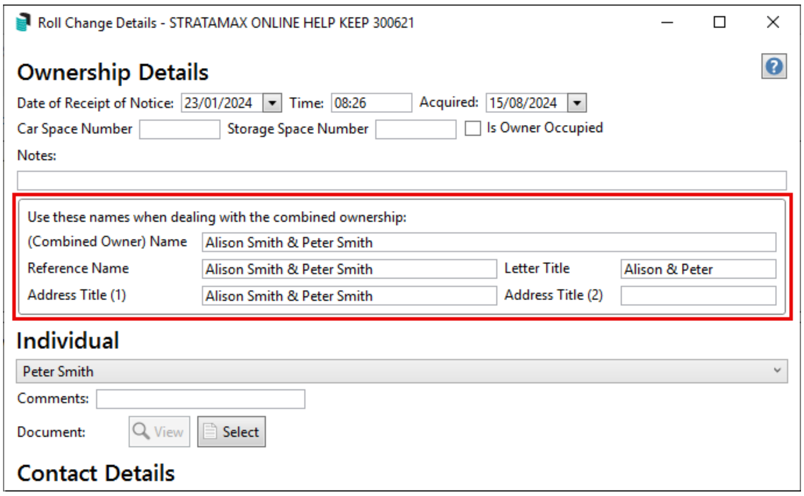
Select Contact

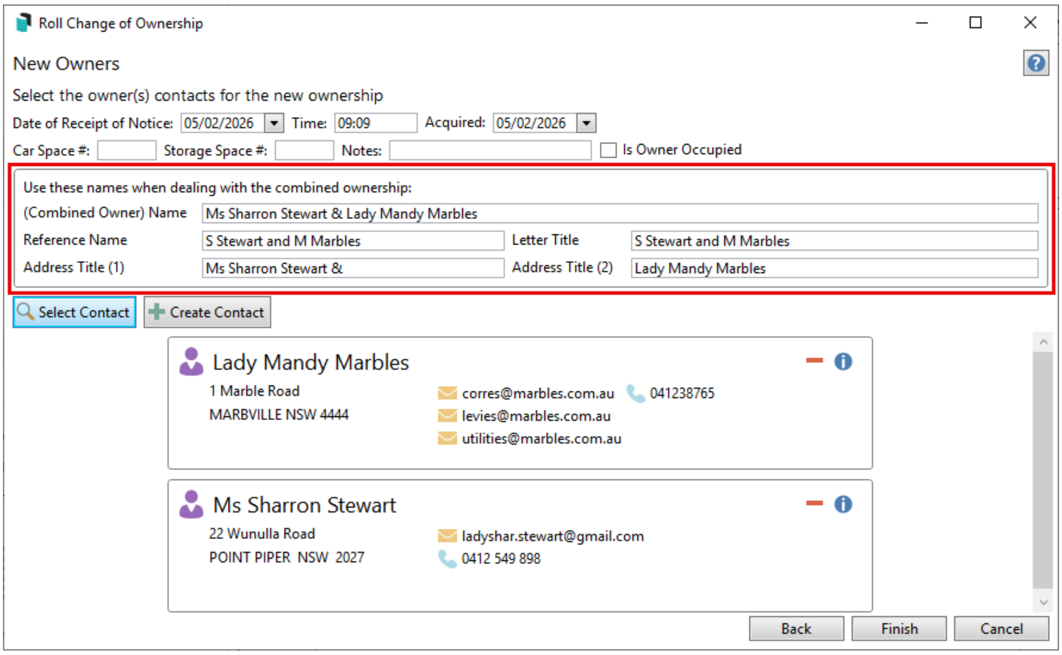
1. Search or select ***Roll***. In the Account Code List, select the relevant lot and click *OK.*
2. In the Roll screen, click the *Change Ownership* button.
3. If there is more than one Contact on the lot, you will be prompted to select if this is:
    - Normal change of ownership.
    - Deceased / 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* to select an existing contact, use the *Search* field if necessary to locate the Contact by name, address, or the ABN or ACN can also be searched, to show inactive Contacts > *Select Contact* > *Include Inactive > Select*, 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. Click *Finish.*
7. If there are additional contacts to be added to the lot, click *Select Contact* to select an existing one or *Create Contact* to create a new one.
8. If any report sets are configured for distribution, they will appear 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)*, *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 next to the owner 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 the *Change Ownership* button following the *Change of Ownership* process.



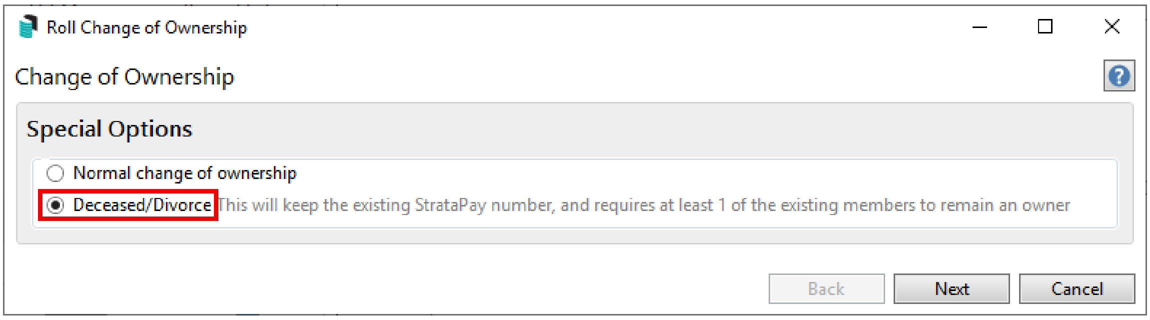


Change of Ownership | Deceased/Divorce

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 the *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).

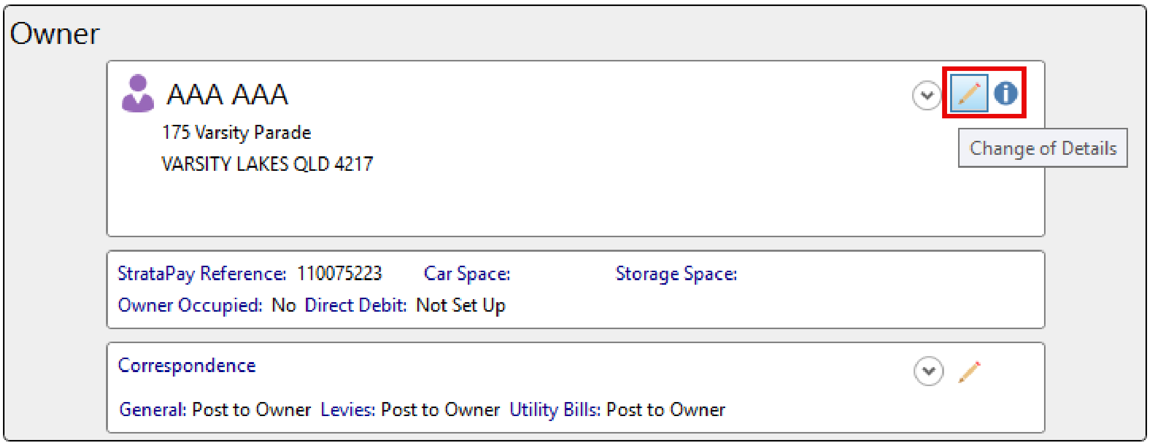


4. Review the *Acquired* date and enter. If there is a car or storage space associated, enter this information, and if known, select *Is Owner Occupied.*
5. Click *Select Contact,* then select the original owner whose Contact should remain with the lot.
6. Review information and click Finish.
7. Print any Roll Distribution reports and *Close*.
    - The Roll record will be updated with the selected Contact, and the StrataPay References will remain unchanged.

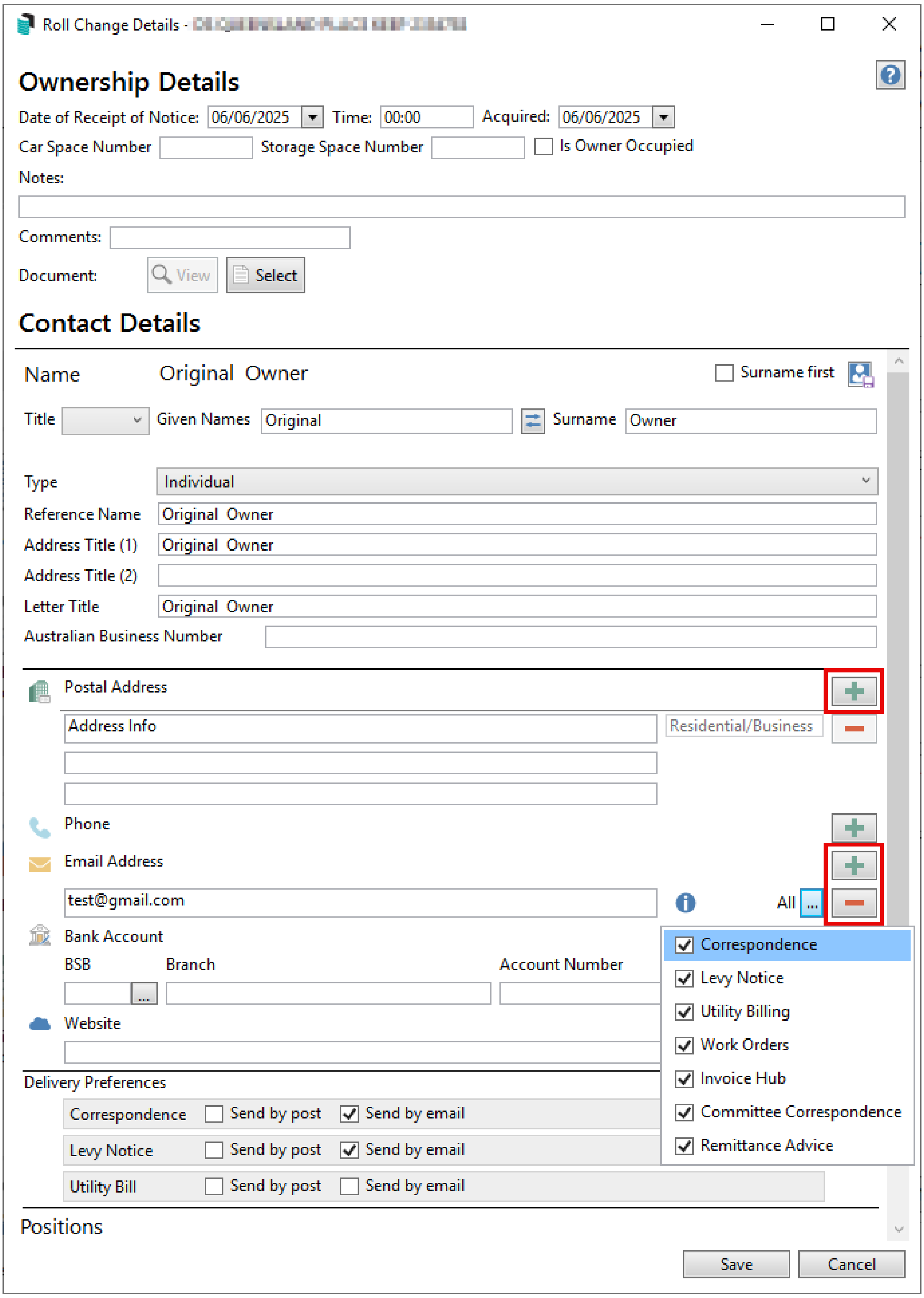
Change of Details

If changes are needed to an existing contact associated with 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.

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 notice receipt 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.



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.
4. If entering a Postal Address, the automatic address lookup will automatically suggest and auto-populate an address for you.
    - Only Australian postal addresses are looked up. Overseas addresses can be typed in manually.
    - The address will be auto-populated in title case for the first line, and the Suburb and State will be in upper case. Once an address is selected, it will populate in the address fields, which can then be edited as required.
    - **NOTE: Due to the limited number of characters (30) available on each line, the Suburb will be populated on line 2, with the State and Postcode on line 3.**

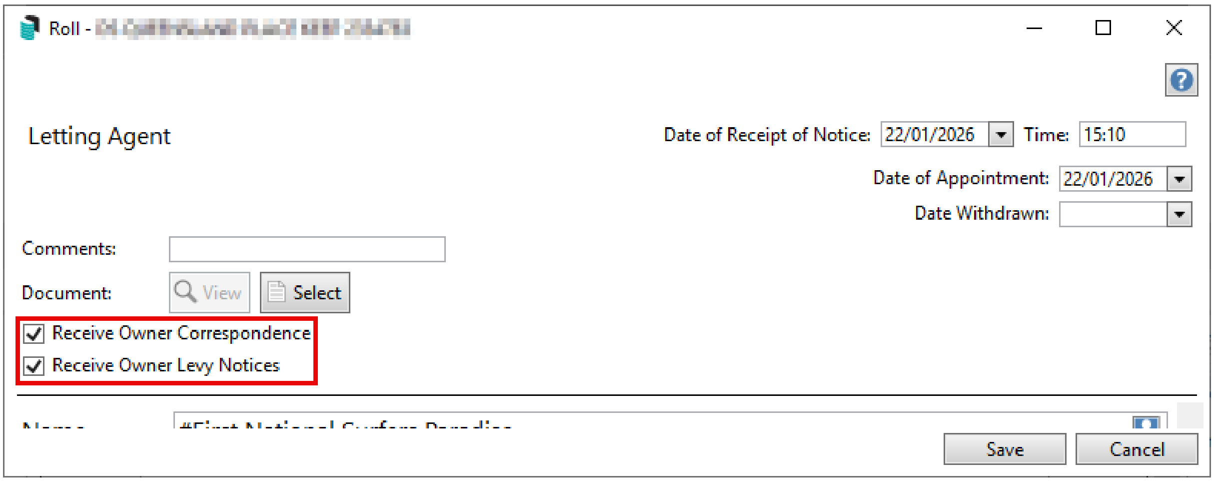


5. Click *Save* to update the contact card.
6. If any *report sets* are configured for distribution, these will be available in the *Report Distribution* window, with the change of detail owner pre-tagged. Click *Proceed* to send these reports to the Owner.

Adding Other Contact Cards to a Lot

This section covers how to add another contact type to a lot. The other types can be Entitled Person, Nominee, Proxy, Power of Attorney, Tenant, Real Estate Agent, and Other Person, but the options available to you will vary based on the building's state.

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 required fields for the selected contact type, and if there is a document to attach, click *Select* and add it from the DocMax window.
4. Click *Select Contact* to select an existing contact, to show inactive Contacts > *Select Contact > Include Inactive > Select*, 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.



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

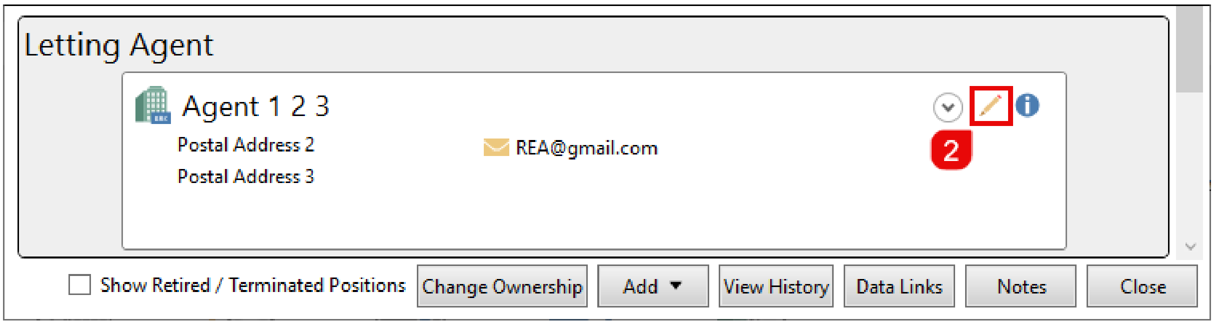
Removing other Contact Card from a lot

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

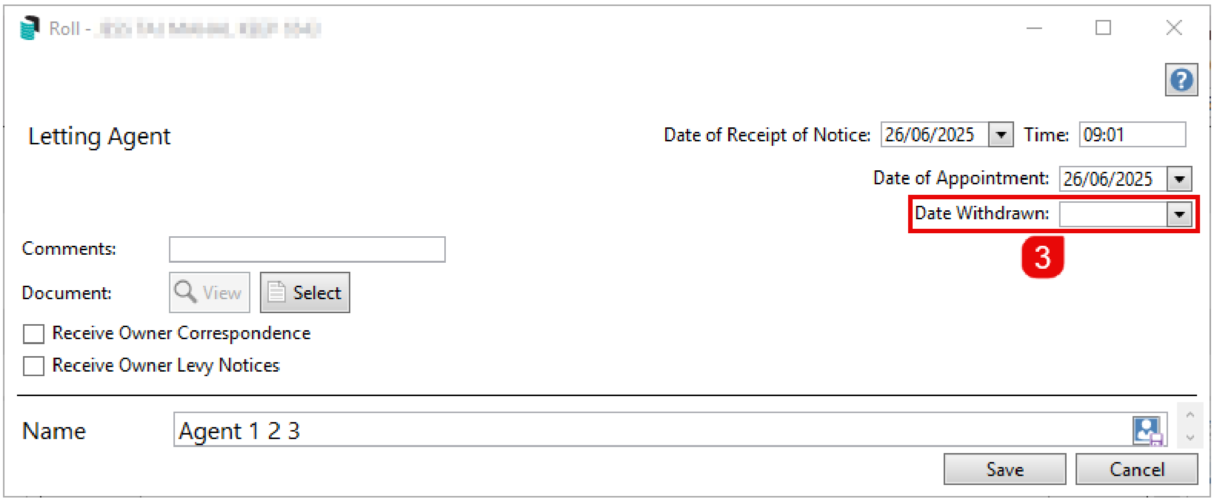
> Once the termination/withdrawal/retirement date has been entered, you can still review and edit the contact's details by clicking the 'Show Retired / Terminated Positions' box in the bottom left of the ***Roll*** screen.

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).

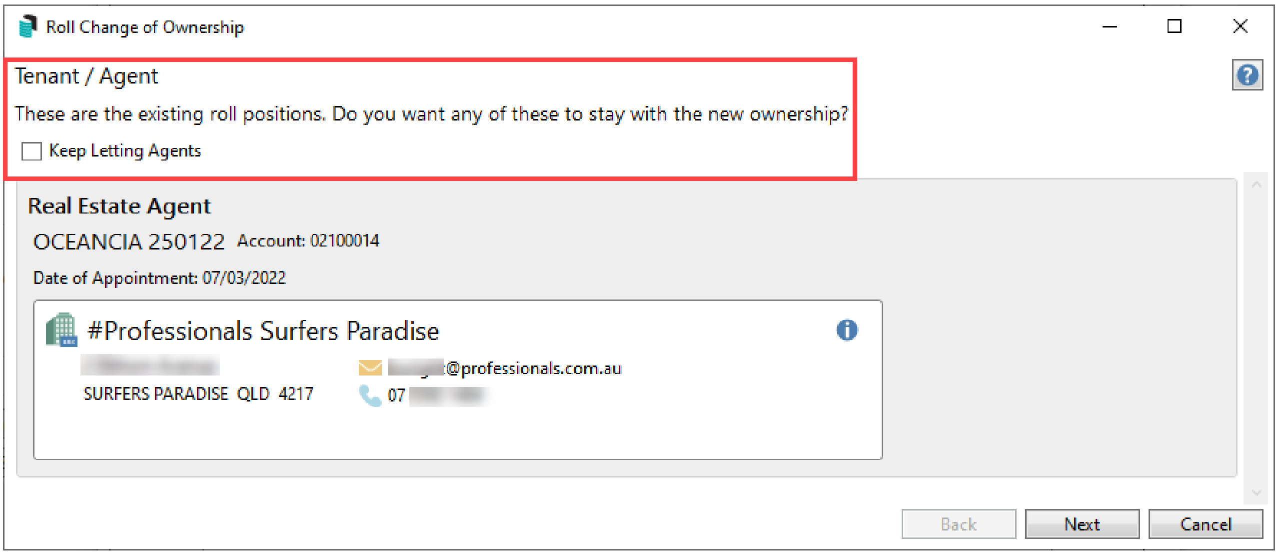


4. Click *Save.*

Changing Ownership with other contact cards included

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



Change Ownership and the StrataMax Portal

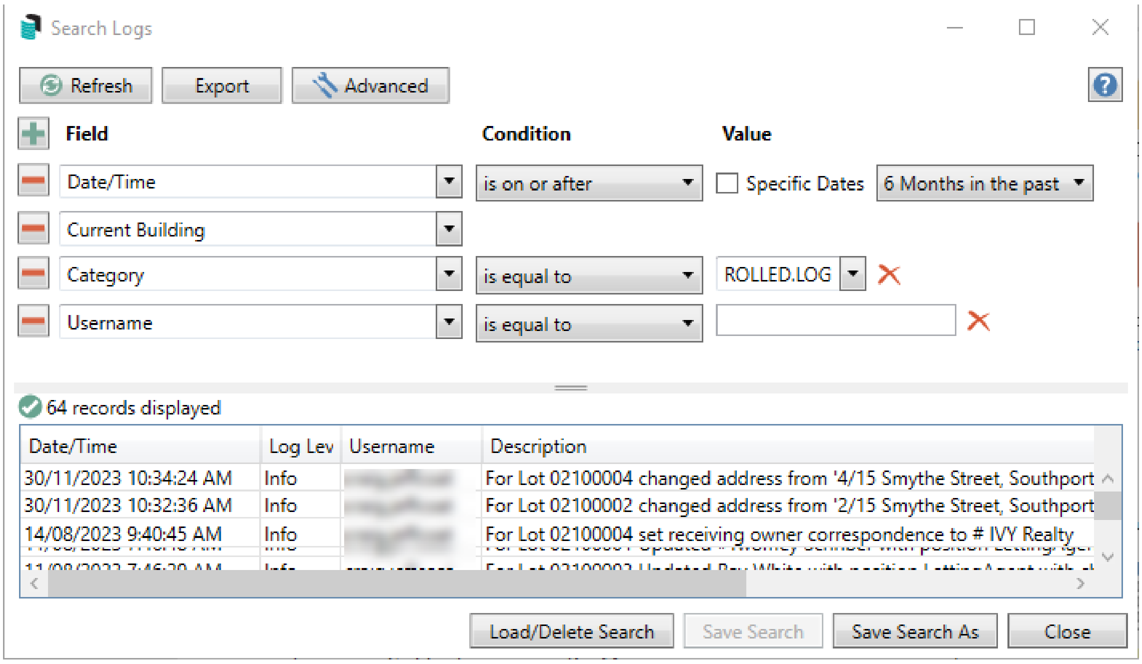
With a change of ownership, access to the StrataMax Portal will be disabled for the owners who have sold the lot. The new owners can create a portal account or add the new lot to their existing portal account. Instructions for owners on managing their portal account are available here.

If the owner selling the lot is an Office Bearer, the change of ownership will prompt the user to resign the Office Bearer record. If the owner owns multiple lots and the lot being sold is set up as the Office Bearer record (Office Bearer Owner of Lot field), but the owner remains as an office bearer, it is recommended to change the Owner of Lot field to a lot they still own. That lot will then have Committee Report access on the portal.

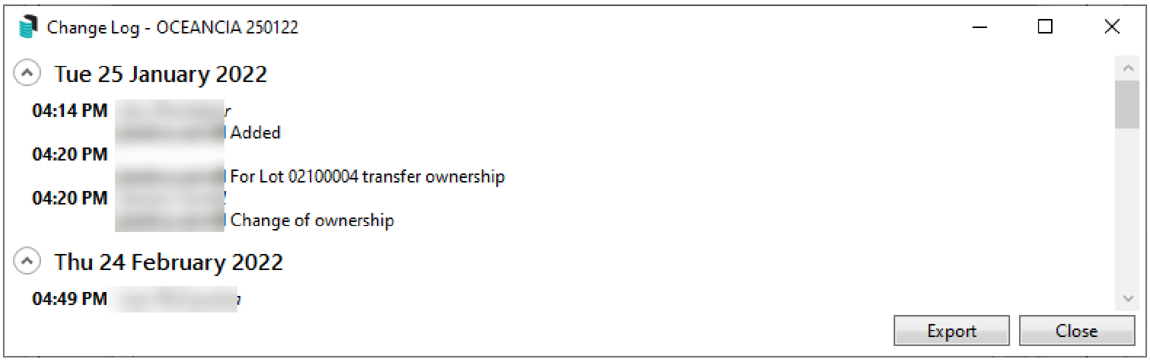
View History

With each change of ownership or detail applied to a lot account, a history entry is created. This can be viewed and is available since the creation of the lot account. The first screen provides a single-line summary of the change included. For a more detailed log, including timestamp, date, and user information, use the *Change Log* button.

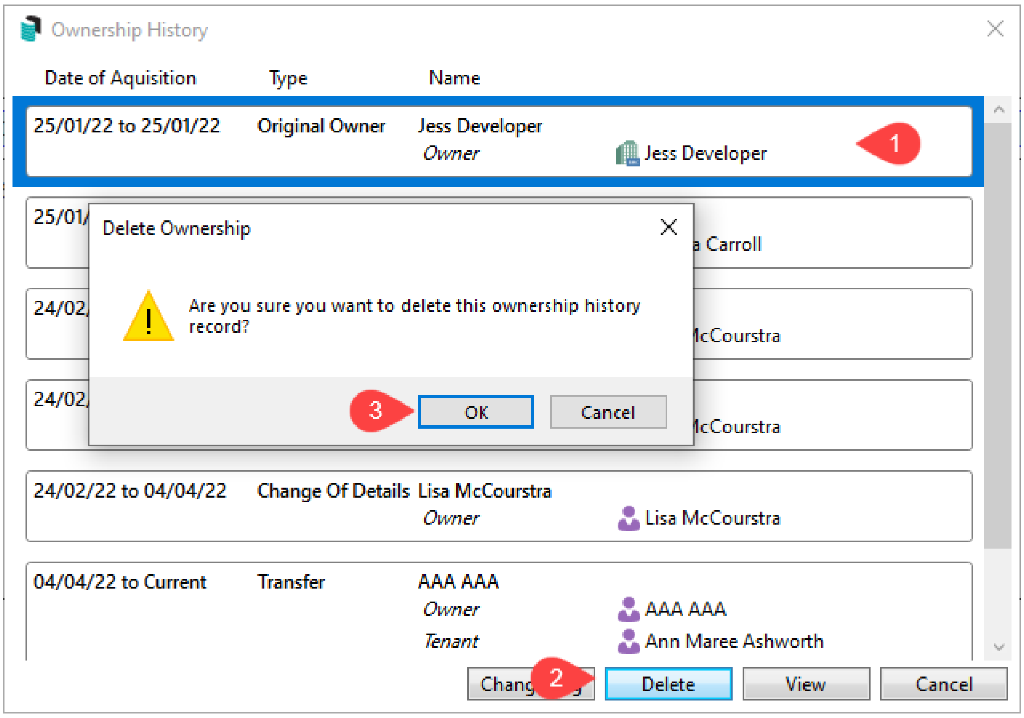
To review more detailed changes made to the ***Roll*** across the entire building, or even multiple buildings, you can use the ***Log Viewer***. The *Category* needed to see changes in the ***Roll*** is called 'ROLLED.LOG'.



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



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

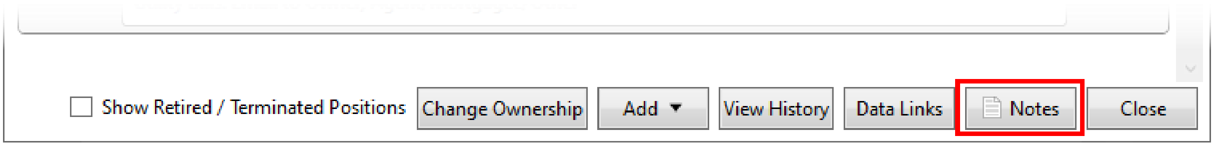


- **View:** Select a past history record, then click *View* to display this information.
- **Cancel:** This will close the View History area.

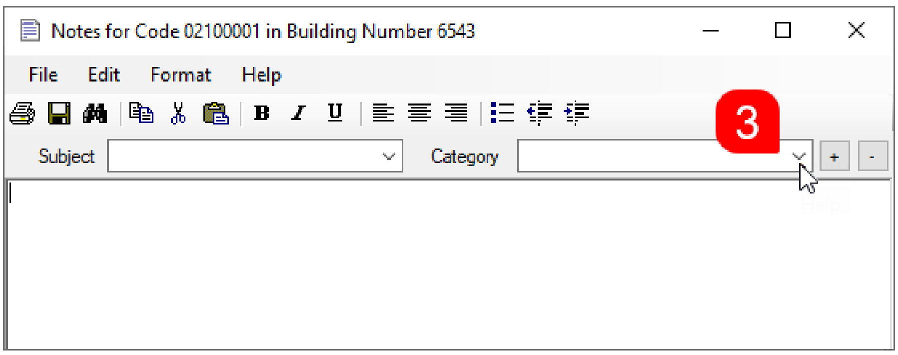
Notes

Notes on a lot account can be recorded for lot-specific information, and certain system processes automatically record notes. 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 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 following 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.

Contact Details

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	
Australian Company Number	

Postal Address

C/- Frank Flinstone — Residential/Business

Bedrock Drive

Bedrock

Levy Notice

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

ABC Strata

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

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

Linked