

Roll | Configuration and Overview

Last Modified on 18/02/2026 11:10 am AEST

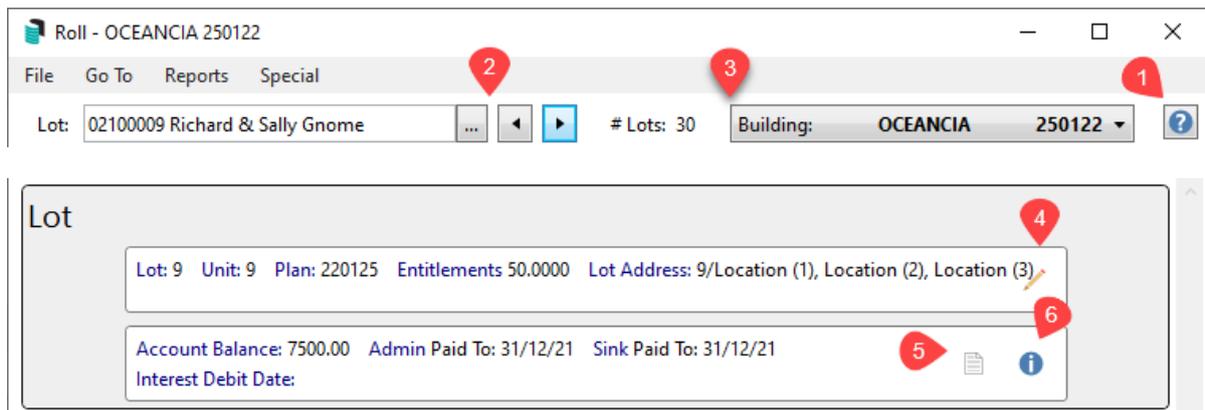


The instructions in this article relate to the **Roll** screen configuration and an overview of its functions, including the various automated roll reports available when changing the ownership of a lot in a building. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Access is controlled by allowing permission to the **Roll** menu in **Security Setup**.

For instructions on procedures in the **Roll**, please refer to this [link here](#).

Roll | Overview



1. *Help* opens online help search results for the term 'Roll'.
2. The *Lot* field is used to change the lot account and supports the forward and back arrows to navigate to a different lot. Or use the ... to select the lot directly.
3. *Building Selection* is used to switch to a different building.
4. Lot Information
5. Notepad icon where the stored documents for the lot are available.
6. Blue (i) icon will display an on-screen ledger card.

Edit Plan Number

The *Pencil* in the 'Lot' section icon is for editing the following fields: *Lot Number*, *Unit Number*, *Plan Number*, *Title/Reference*, and *Lot Address*. For changes to lot entitlements, you will need to complete a *Change of existing lot entitlements*.

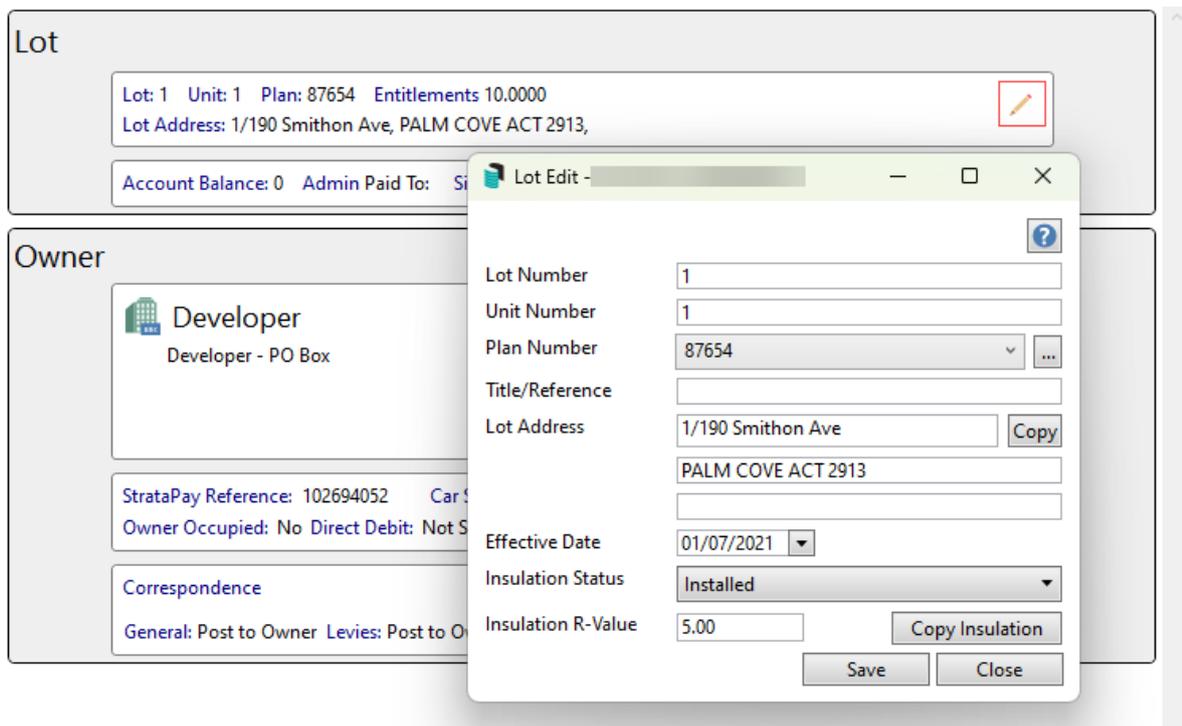
1. Click the ... button to add to the information. Within the **Lot** area, select the pencil icon.
2. Click the ellipsis button [...] next to the *Plan Number* field to open the *Plan Edit* screen, where you can add more plan numbers, edit the existing plan number, and change the plan type.
3. The initial plan number will be populated from **Building Information**.
4. Click + Add Plan, complete the Plan Number and Date, and select the Plan Type. Click Save.
5. From the Plan Number drop-down list, select the corresponding plan number for that lot. Click Save.

Plan Number	Plan Date	Plan Type	Lot Count
104853		B.F.P.	4
			0

+ Add Plan Save Close

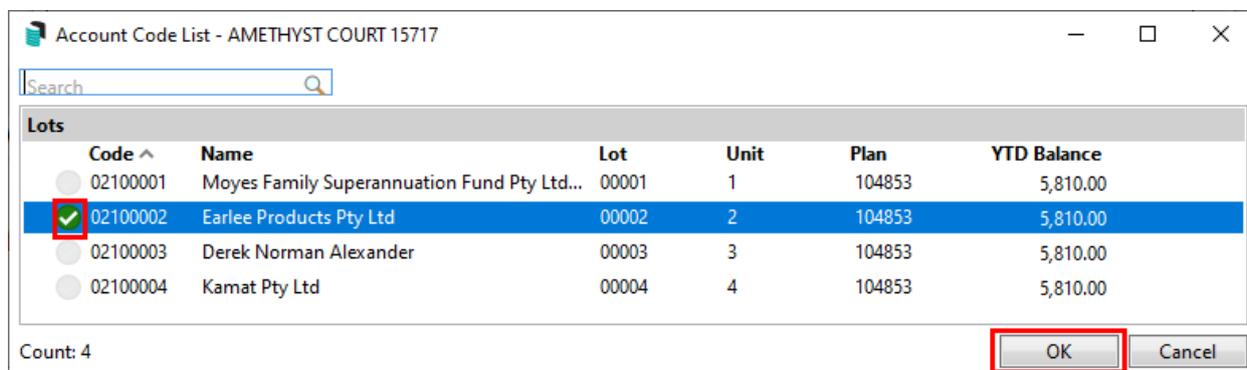
Lot Address Editor

1. Search or select **Roll**. Select a lot account.
2. Select the pencil icon to edit the lot address within the **Lot** area.
3. The unit number will be populated from the lot number field, and the street address will be updated based on the building's address information. 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 *Title/Reference* information requires population, it must 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. For ACT buildings, select the Insulation Status and Insurance R-Value (numeric field). Click *Copy Insulation* to copy the details from these fields to other lots.
8. Click *Save*.



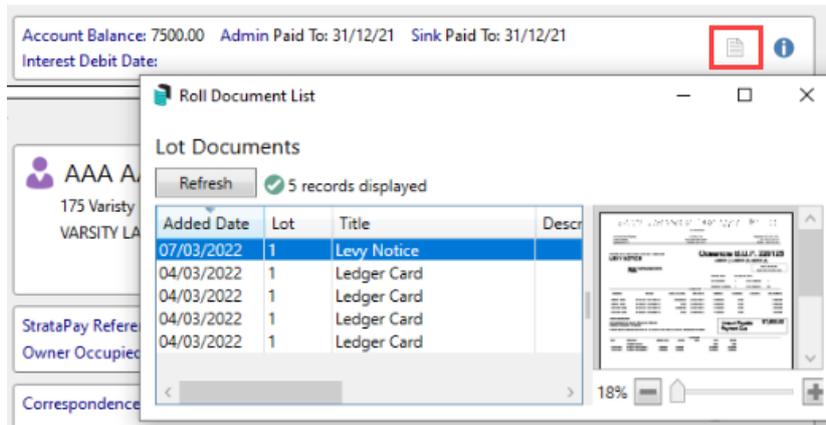
Copy Lot Address information

Click the *Copy* button to copy the *Lot Address* information to other lots in the building. Upon clicking the *Copy* button, tag the required lots, then click *OK*.



View Document Attachment

The *Document* button will display a preview of Levy Notices, Arrears Notices, Ledger Cards, Invoice Printing and Merge Letters produced for the owner, and include the date produced. Also, the email address information will be included if sent by email. Double-click on the document or right-click to use the DocMax function to email this document or complete any other DocMax function.



View Ledger Card

The blue *Info* icon will display an onscreen ledger card for the selected lot account.

Date	Description	DR	CR	Due	Balance
31/01/2022	Levy 01/04/22 to 30/06/22	1250.00		01/04/2022	1250.00
31/01/2022	Levy 01/04/22 to 30/06/22	2500.00		01/04/2022	3750.00
31/01/2022	Levy 01/01/22 to 31/03/22	1250.00		01/01/2022	5000.00
31/01/2022	Levy 01/01/22 to 31/03/22	2500.00		01/01/2022	7500.00
		Ledger Card		Balance: 7500.00	Overdue: 7500.00

Owner

 **Richard & Sally Gnome**
 18 Body Corp St
 BODY CORPORATE LAND

StrataPay Reference: 972026872 Car Space: Storage Space:
 Owner Occupied: No Direct Debit: Not Set Up

Correspondence

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

Show Retired / Terminated Positions

The Owner section contains the contact information for the current lot owner and is displayed there. This may include single or split contact information depending on how many people own the selected lot.

7. The *Split* icon will appear when multiple ownerships that include **&**, **and** or **,** characters, ready to split these into individual contacts. This will offer control over specific contact reporting and function for each.
8. The *Expand* arrow reveals the contact information including address, phone, email and website information. It will also allow for the bank account information to be entered. It does not replace the current *Direct Debit (Owner Bank Account/EFT Setup)* function for an owner refund or reimbursement.
9. The *Pencil* icon opens the *Contact Card* screen for the *Ownership details*, where the information can also be edited.
10. The blue *Info* icon displays a preview of the *Contact Card* and also allows for the information to be edited.

Other information available in this area includes: the *StrataPay Reference* number with the *Direct Debit* status (if applicable), *Car* and *Storage Space* information.

Correspondence Preferences

The **Correspondence** delivery arrangements are included in this area, specifically for General Correspondence, Levies and Utility Bills. This area is used to refer to when setting *Correspondence and Levy Notice* delivery arrangements when using an Agent, Mortgagee or Other types.

Expand arrow: This will confirm all delivery methods, including email addresses and postal information.

Pencil: Editing the correspondence preferences, including the contact preferences for *Agent, Mortgagees or Other* if not configured for receiving information when adding the contact.

Position	Title	Correspondence	Levy Notices
Owner	Miss Deven Lang	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tenant	Teagan Mraz	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Real Estate Agent	Chauncey Bins	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Correspondence when ticked will allow the recipient to be selected.
Levy Notices, when ticked, will allow the recipient to be selected.

Show Retired / Terminated Positions: This will display any contact that has been terminated as a contact from the selected lot account.

Change of Ownership: This will allow for the lot ownership to be changed.

Add: Add another contact type of the selected lot account.

View History: This area will provide a log of the ownership changes made. Within this screen, the 'Change Log' button will provide further information, including username and time/ date stamps with more detailed information of the change.

Data Links: Linking Owners who own another lot in the selected building or another is where this can be done.

Notes: This area will contain any notes available on the lot account. Certain processes will also create system notes, for example: Certificates and Arrears notices.

Close: Close the roll screen.

Email Purposes

A contact can be set to include emails for a specific purpose. This can apply to any contact in StrataMax.

Correspondence: This email will be used for areas like **Merge Letters**, **Meeting Hub**, and all other Roll Report areas that are not related to Levy, Arrears, or Utility.

Levy Notice: Used in **Levy Notice/ Reports**, **Invoice Printing**, and **Arrears Notice**.

Utility Billing: This email address is applicable for the **Utility Billing** module. It will allow an agent or other roll record to have a specific email applied.

Work Orders: Primarily used for **Creditor Maintenance** contacts and will allow **TaskMax** to send emails to this specific address.

Invoice Hub: This email will allow Committee Members (**Office Bearers**) to use a specific email to approve invoices via the Portal.

Committee Correspondence: Used for **Status Report** (Committee only) report.

Remittance Advice - This email will be used for specific **EFT Manager** remittance advice.

Postal Address +

2116/20 Stuart St Residential/Business -

TWEED HEADS NSW 2485

Phone +

Email Address +

ed@eggs.com All All -

Bank Account -

BSB Branch Account N

Website

Delivery Preferences

Correspondence	<input type="checkbox"/> Send by post	<input checked="" type="checkbox"/> Send by email
Levy Notice	<input type="checkbox"/> Send by post	<input checked="" type="checkbox"/> Send by email
Utility Bill	<input type="checkbox"/> Send by post	<input checked="" type="checkbox"/> Send by email

Correspondence
 Levy Notice
 Utility Billing
 Work Orders
 Invoice Hub
 Committee Correspondence
 Remittance Advice

Positions

Save Cancel

Further contacts included on the Lot

If there are any further contacts, Entitled Persons, Nominees, Power of Attorney, Mortgagees, Real Estate agents, or Other Persons included with the lot account, these will be displayed under their respective headings.

Tenant

Ann Maree Ashworth ⌵ ✎ ⓘ

2040/Gracemere Gardens Circuit
 Hope Island Resort
 Hope Island QLD 4212

Real Estate Agent

#Gold Coast Holiday Rentals ⌵ ✎ ⓘ

PO Box 1501 ✉ services@gchr.com.au ☎ 1300 588 277

SURFERS PARADISE QLD 4217 ☎ 0450 896 557
☎ 07 5539 8553

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

Roll | Configuration

The below configuration options will assist in configuring the Roll screen set from **Roll** / File / Configure, with each setting confirming if User or Global groups are affected.

Show Lot Selection on Load (user setting)

This will display the lot selection list on launching the Roll. If not configured, select the Lot account from the Lot selection tool.

Owner reference name switch (user setting)

The Name Switch refers to the automatic switching of the last and first names entered in the Reference field when setting up a new lot, or conducting a change of ownership.

Meeting Notice Flag (user setting)

This configuration will set what the meeting flag (send Committee Meeting Notices or Minutes) would be in the Roll when new lots are created, or when a change of ownership is done.

Label Printing and Merge Letters use this setting to exclude lots that have been set to 'N' (No) when preparing labels or creating a merge letter.

Clear Arrears Notice on Transfer (global setting)

This setting will reset the arrears notice schedule when a change of ownership is done after the *New Owner Arrears Days | Arrears Days Key Field* has been reached (configured in [Arrears Notice settings](#)).

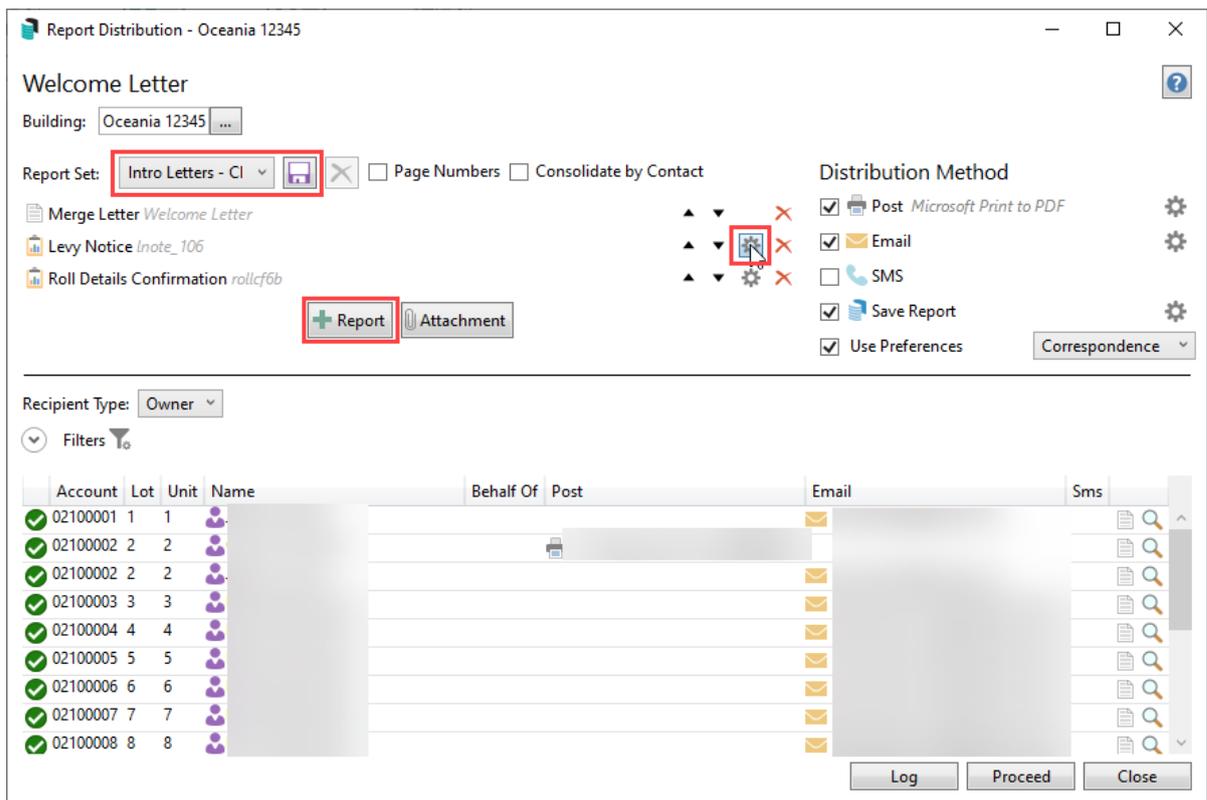
Change of Ownership & Change of Details - System-generated Report Sets

The settings in the Report Distribution window determine what merge letters and reports are configured when a change of ownership or details is performed, such as a Roll Details Confirmation Form, StrataMax Introduction Letter or Levy Notice. These reports can be adjusted and set to include as many reports and merge letters as desired, or include none if preferred. When a change of ownership or detail is applied to the **Roll** record, these will be automatically produced based on what has been set in each. A Change of Details does not require a Merge Letter to be included.

Adjusting Intro Letters Roll Report Set

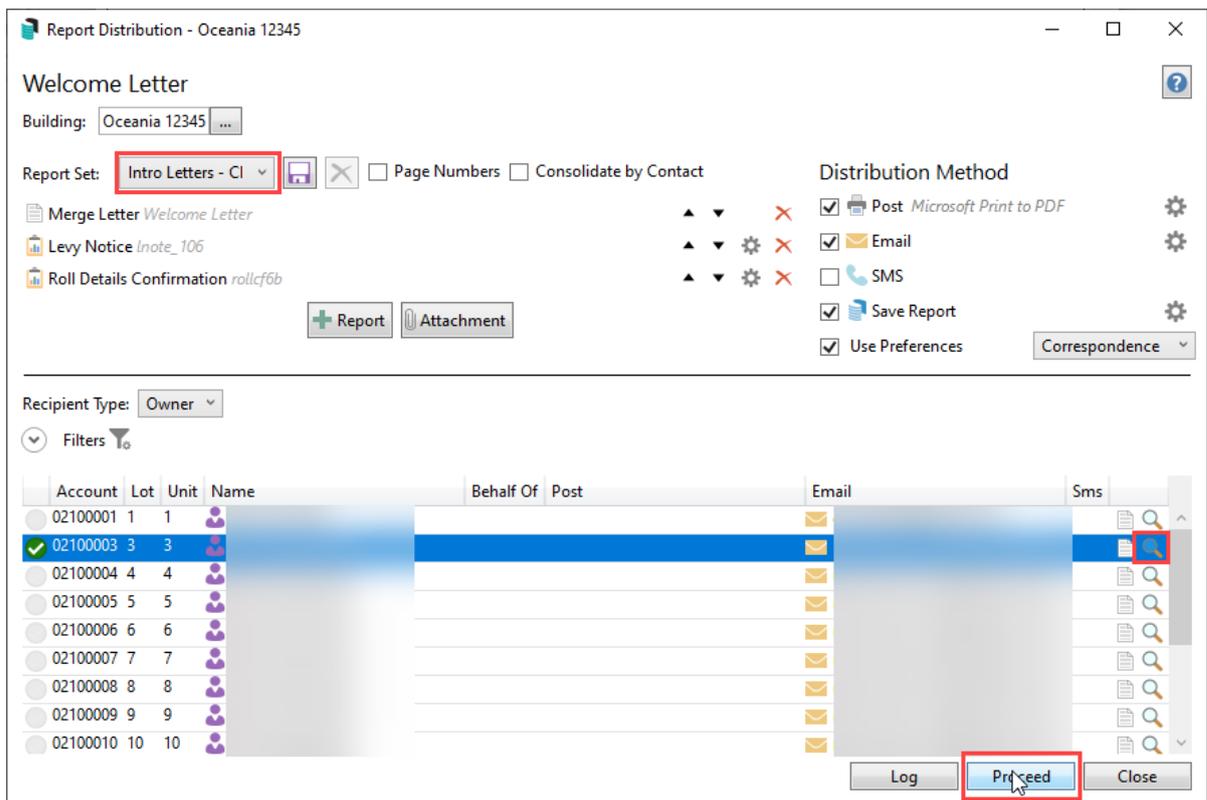
1. Search or select **Merge Letters**. Click Cancel to the *Merge Letter Report Selection* List.
2. Select *Intro Letters - Change of Details* or *Intro Letters - Change of Ownership* from the Report Set drop-down. Each can be adjusted.
3. Review what has been set, and configure any templates. Example - Levy Notice, Roll Details Confirmation by selecting the cogwheel on each and setting.
4. Click **+ Report** to add any further *Merge Letters* or *Reports*. These will be added one at a time.
NOTE: Click the red cross to remove existing merge letters and reports.
5. Click the *Save* icon to update the report set.
6. Repeat for the other Intro Letter type if required.

NOTE: If a *Roll Details Confirmation* report has been included in a [Report Set](#) it is recommended that the Confirmation Details Text is reviewed.



Redistributing Intro Letters Roll Report Set

1. Search or select **Roll**. In the Account Code List, select the required lot and click **OK**.
2. From *Reports / Print Intro Letters*, select *Change of Details* or *Change of Ownership*.
3. The selected account will be tagged in the *Report Distribution* window. Click *Proceed* or the *Magnifying Glass* icon to preview the report set.



4. From the *Report Publish* window, click *Proceed* to finalise the distribution.

Change of Details - Remove Merge Letter

The settings in the Report Distribution window determine what merge letters and reports are configured when a change of details in the **Roll** is performed, such as a Roll Details Confirmation Form, Merge Letter or Levy Notice. These reports can be adjusted and set to include as many reports and merge letters as desired, or include none if preferred. When a change of detail is applied to the **Roll** record, these reports will be automatically produced based on what has been set in each. It is possible to set only reports and not include a Merge Letter.

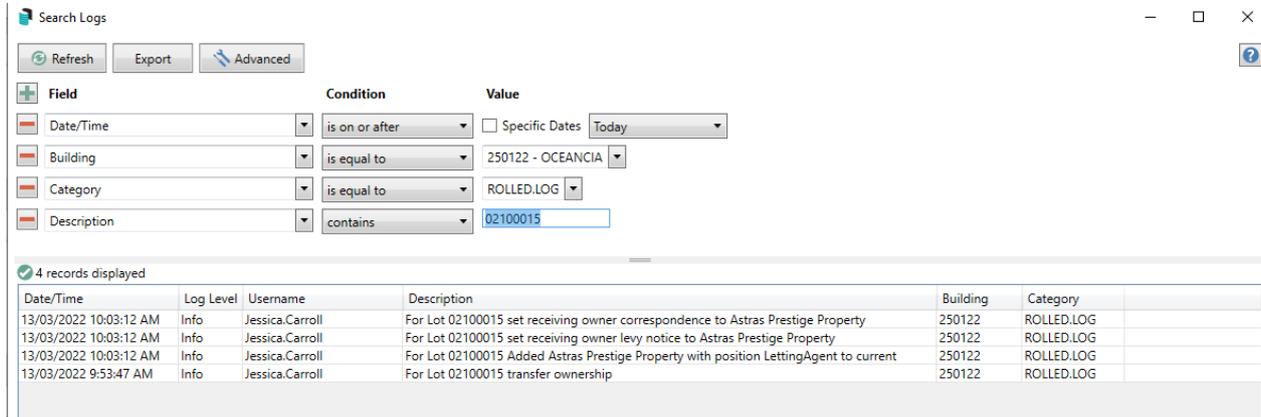
1. Search or select **Merge Letters**. Click Cancel to the *Merge Letter Report Selection List*.
2. Select the *Intro Letters - Change of Details* from the Report Set drop-down.
3. Review the reports set, and configure or remove any templates. Example - Levy Notice, Roll Details Confirmation by selecting the cogwheel on each.
4. Click the red 'x' next to the report to remove any *Merge Letters*.
5. Click the *Save* icon to update the Report Set.

Roll | File Menu

This area discusses the options available under the *File* menu in the **Roll**.

View Log

This opens the *Search Logs* window, pre-populated with various fields related to the **Roll** screen, specifically the log category of *ROLLED.LOG*. Click the green 'plus' button to add fields and enter information based on search criteria, or the red 'minus' button to remove fields. Use the *Description* field to enter keywords to drill into a specific lot account. Click *Refresh* to review the results.



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

Field	Condition	Value
Date/Time	is on or after	<input type="checkbox"/> Specific Dates Today
Building	is equal to	250122 - OCEANCIA
Category	is equal to	ROLLED.LOG
Description	contains	02100015

4 records displayed

Date/Time	Log Level	Username	Description	Building	Category
13/03/2022 10:03:12 AM	Info	Jessica.Carroll	For Lot 02100015 set receiving owner correspondence to Astras Prestige Property	250122	ROLLED.LOG
13/03/2022 10:03:12 AM	Info	Jessica.Carroll	For Lot 02100015 set receiving owner levy notice to Astras Prestige Property	250122	ROLLED.LOG
13/03/2022 10:03:12 AM	Info	Jessica.Carroll	For Lot 02100015 Added Astras Prestige Property with position LettingAgent to current	250122	ROLLED.LOG
13/03/2022 9:53:47 AM	Info	Jessica.Carroll	For Lot 02100015 transfer ownership	250122	ROLLED.LOG

Add New Lots

This is where new lots can be added to the building. If the process is to add new lots to a new building, please see this [article](#). If the process is to add new lots to an existing roll, please refer to the [Resubdivision article](#).

Import Roll

Import Roll can assist with creating the Roll base, including entitlements, lot and unit numbers. An Export Roll will need to be completed first to create an .xml which can then be opened in Excel. Using the exported file, update the data, ensuring the Account code is in the 021000XX format. This does require some knowledge and skill in Excel, along with an understanding of Roll field requirements. Please get in touch with [StrataMax Support](#) in the first instance to discuss your requirements.

Export Roll

This will export the roll data onto a .xml file, which can then be opened and reviewed in Excel. This is mainly used in scenarios where the extracted data needs to be imported into StrataMax afterwards. Using the exported file, update the data, ensuring the Account code is in the 021000XX format and this can be imported to create the Roll base.

Please note that the *Import* and *Export* functions do not include the owner contact preferences.

Roll | GoTo Menu

Returned Mail Register

This will offer a shortcut to this register. Please refer to the [Returned Mail Register article](#) for more info.

Occupation

This register offers the ability to enter occupation information specific to a lot account. This offers a report only in this area and does not link with the **Roll**.

Roll | Reports Menu

Levy Notice & Correspondence Delivery Arrangements

Reporting how an owner receives the levy notice and correspondence can be done in this area, and is dynamic with settings offered for global agents and mortgagees and copies. Each lot will have two rows; one for the *Levy Notice* and one for the *Correspondence* (look under the 'Category' column).

1. Search or select **Roll**.
2. Select Reports / *Levy Notice and Correspondence Delivery Arrangements*
3. Clicking the *OK* or *Cancel* button will close the window.
4. Clicking the *Show in Excel* button will open the contents in Excel where it can be filtered etc.

Lot_Account_Number	Lot_Account_Name	Lot_Number	Unit_Number	Category	Email	Mail	Print_to_Address	Roll_Master_ID	Email_to	Mail_to
	Email Global Agent/M...						Yes			
	Email Copy To Owner						No			
	Email Where Set						Yes		This applies to Owners and Global Agen...	
	Contact Preferences						Yes			
02100001		00001	1	Levy Notice	Yes	No	Residential			
02100001		00001	1	Correspondence	Yes	No	Residential			
02100002		00002	2	Levy Notice	Yes	No	Levy Notice	0000414209		ABC Letting Age
02100002		00002	2	Correspondence	Yes	No	Residential			
02100003		00003	3	Levy Notice	Yes	No	Residential			

Tenanted Lots Report (NSW buildings only)

This report will confirm the total number of active residential lots per building, the number of active residential lots that are tenanted, the percentage of active residential lots that are tenanted, and the name of the tenant representative if one has been appointed and registered within the roll.

It only applies for buildings in NSW in your portfolio. Section 33 of the Strata Schemes Management Bill 2015 and Section 7 of the Strata Schemes Management Regulation 2016 stipulate the requirement for the Strata Manager to arrange for the appointment of a tenant representative, if 50% or more of the lots are tenanted.

All buildings are reported so that any of which may be nearing a 50% limit can be identified and

monitored.

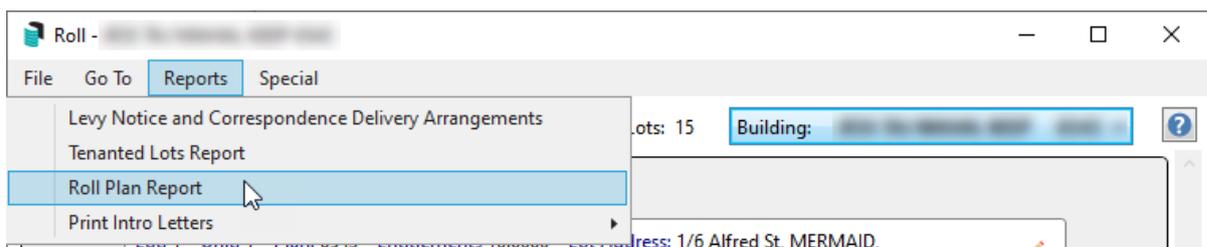
Building Number	Building Name	Account Manager	Number of Lots	Number of Tenanted Lots	% of Tenanted Lots	Name of Tenant Representative
19831	TRAINING SUB GROUPS	StrataMax Training	5	0	0.00	
19832	TRAINING CERTIFICATES		5	0	0.00	
2019	LANA RESORT VII	Lana Clarke	20	3	15.00	Lessee One

When entering the *Lessee* contact in the **Roll**, select *Tenant Representative* to set the contact for reporting, and also adding to the **Office Bearer** area as a Tenant Rep, *Office Held* position.

Roll Plan Report (Lot Liability/Contribution Report)

This report opens in Excel, listing the building's lots with their contribution/liability and interest entitlements.

1. Search or select **Roll**.
2. Click *Reports > Roll Plan Report*.



3. The report will be displayed in Excel.

Building Number	Lot Number	Plan Number	Contribution Entitlement	Interest Entitlement
6543	1	6543	10.00	10.00
6543	2	6543	10.00	10.00
6543	3	6543	10.00	10.00

Roll | Special Menu

Set StrataMax Charge Code

This is a Support only tool.

Transfer Agent Portfolio

This tool can be used to transfer an portfolio from one agent to another. Please refer to [Transfer Agent Portfolio](#) for more information.