Roll | Configuration and Overview

Last Modified on 20/07/2026 9:42 pm AEST

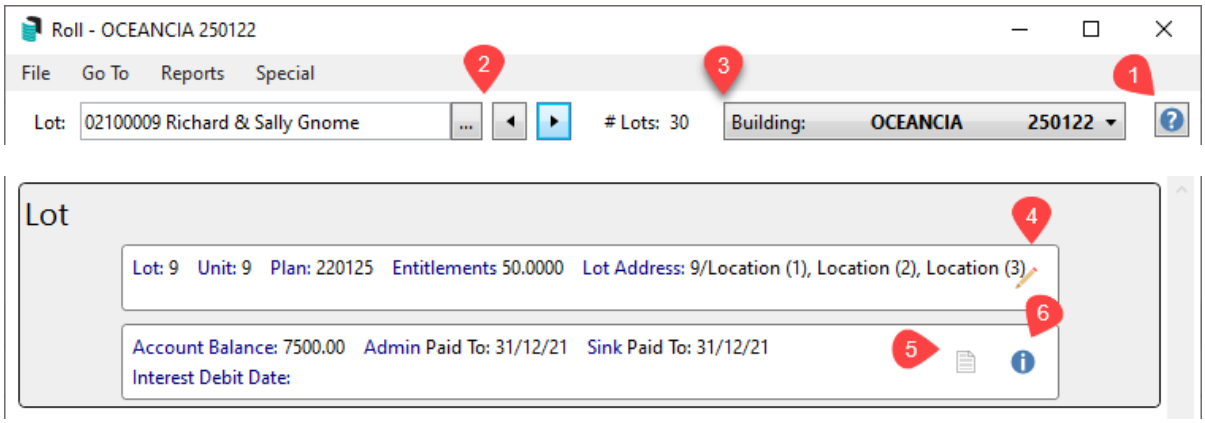


The instructions in this article relate to the ***Roll*** screen configuration and an overview of its functions, including the various automated roll reports available when changing the ownership of a lot in a building. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax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

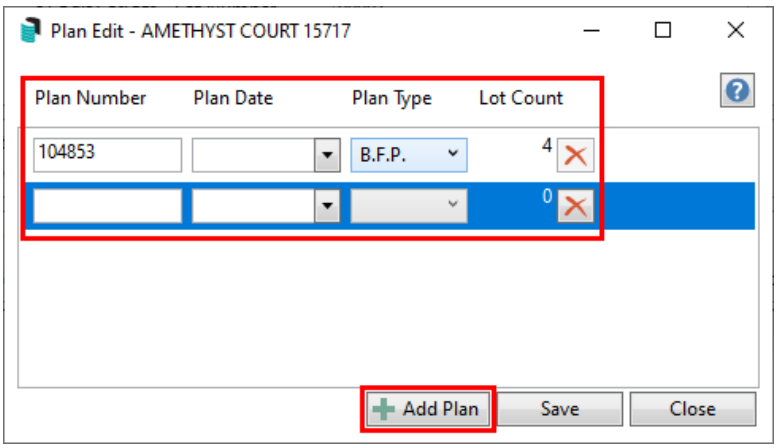


1. *Help* opens online help search results for the term 'Roll'.
2. The *Lot* field is used to change the lot account and supports the forward and back arrows to navigate to a different lot. Or use the ... to select the lot directly.
3. *Building Selection* is used to switch to a different building.
4. 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

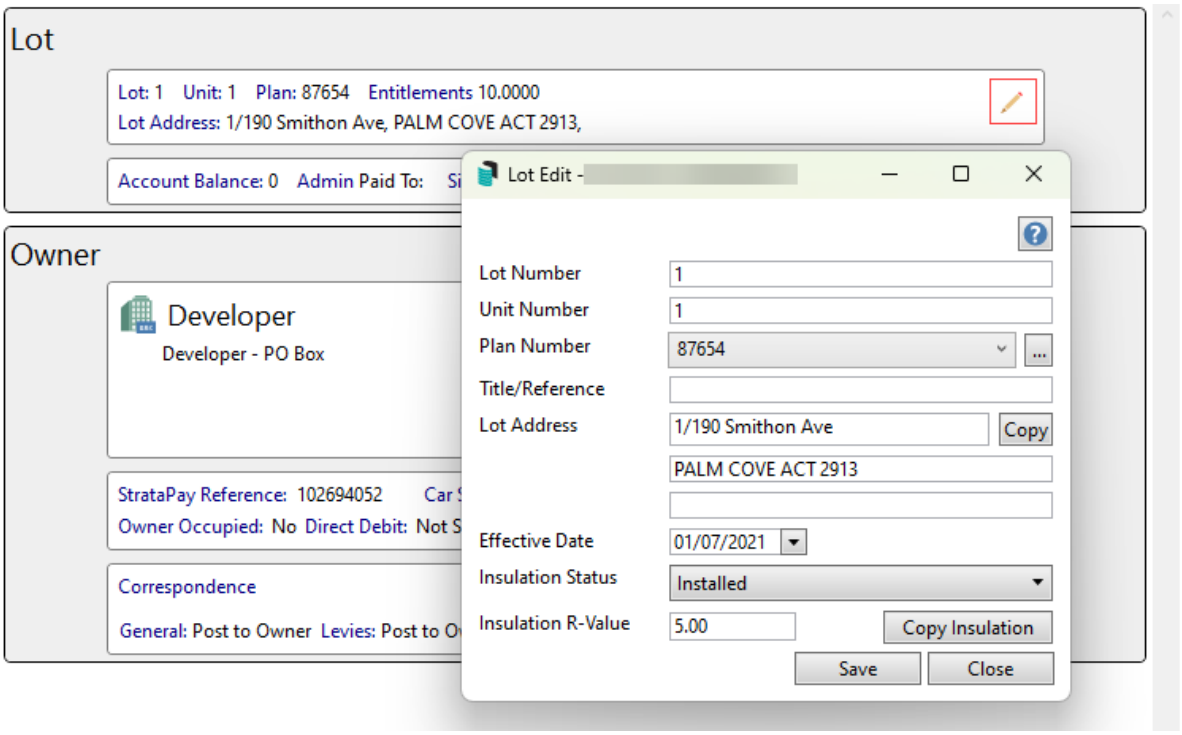
The *Pencil* in the *'Lot'* section icon is for editing the following fields: *Lot Number, Unit Number, Plan Number, Title/Reference,* and *Lot Address.* For changes to lot entitlements, you will need to complete a *Change of existing lot entitlements.*

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.



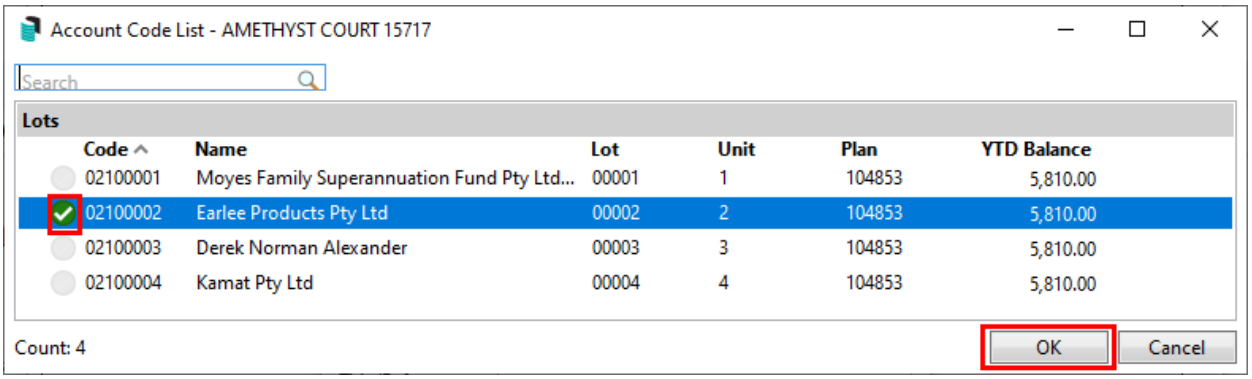
Lot Address Editor

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*.



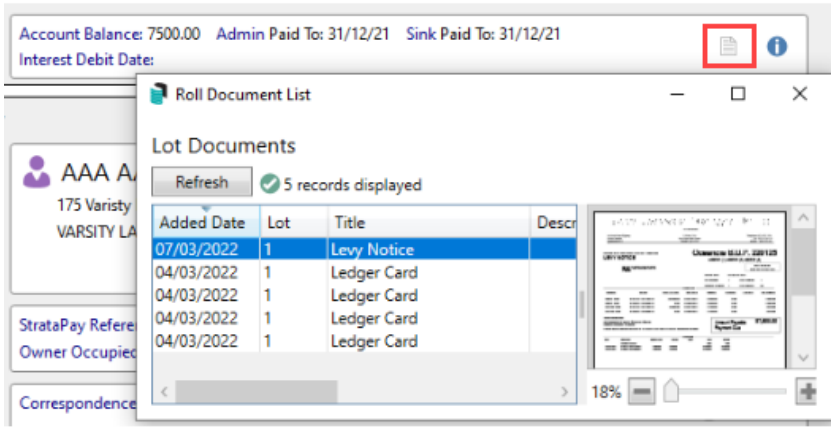
Copy Lot Address information

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.*



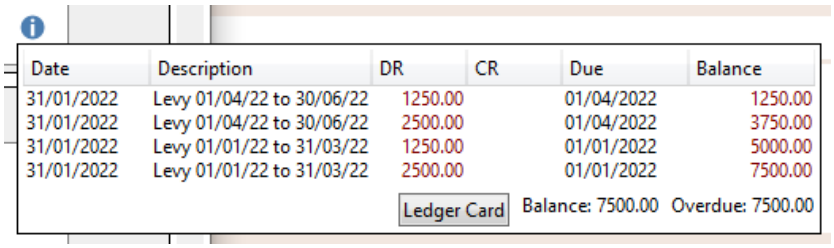
View Document Attachment

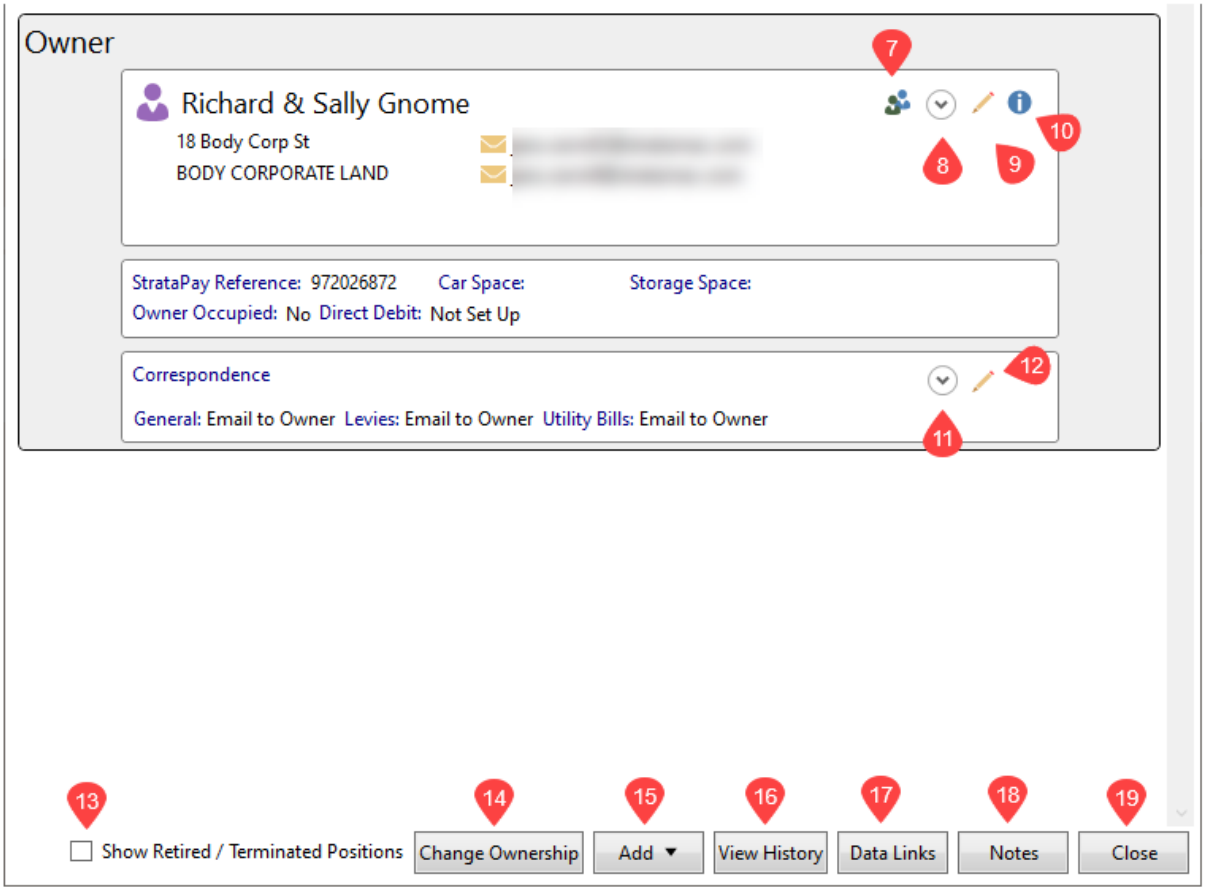
The *Document* button will display a preview of Levy Notices, Arrears Notices, Ledger Cards, Invoice Printing and Merge Letters produced for the owner, and include the date produced. Also, the email address information will be included if sent by email. Double-click on the document or right-click to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





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.

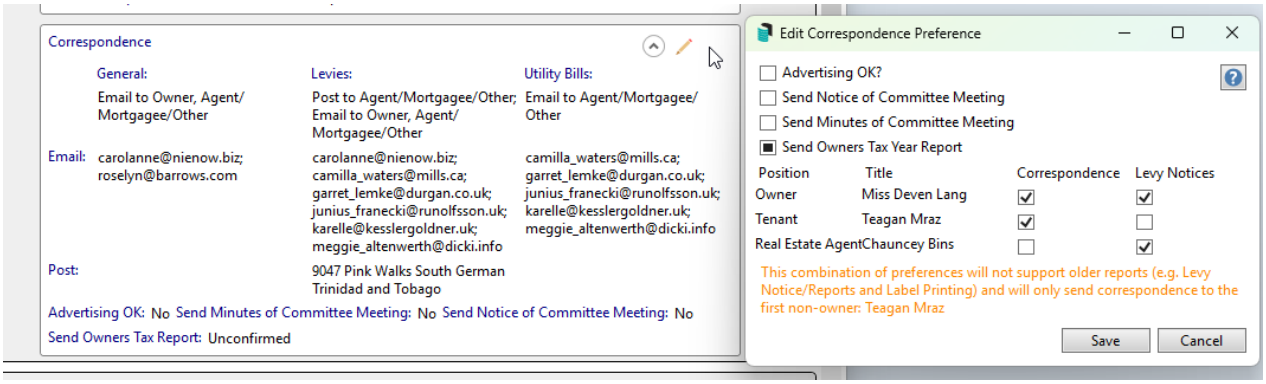
Other information available in this area includes: the *StrataPay Reference* number with the *Direct Debit* status (if applicable), *Car* and *Storage Space* information.

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.



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.***

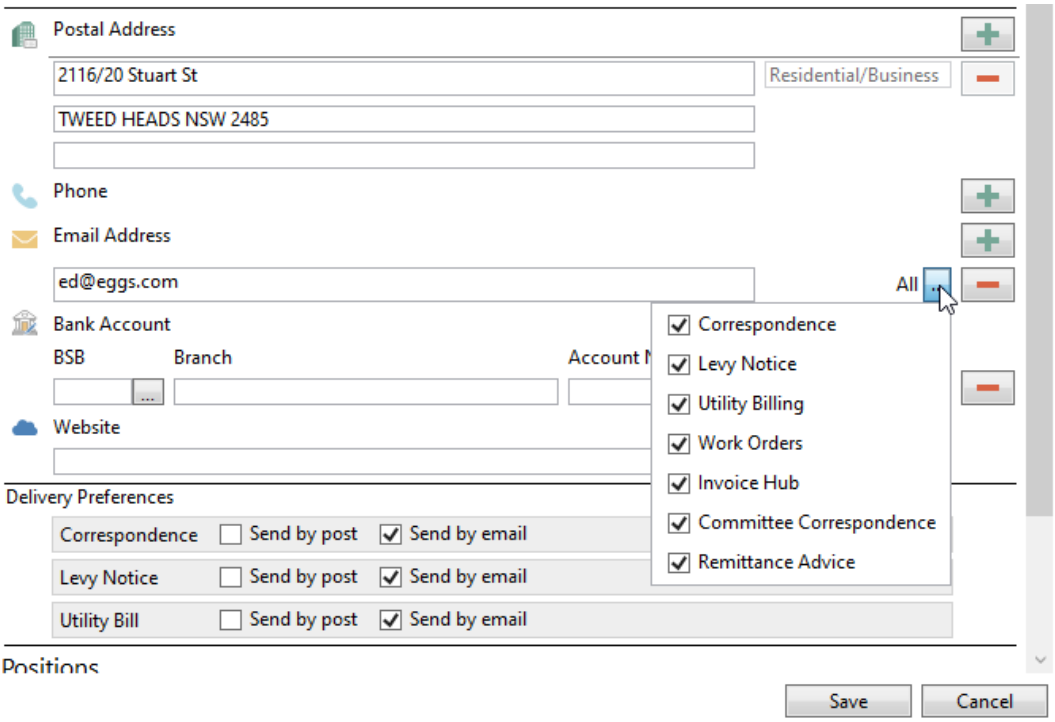
Utility Billing: This email address is applicable for the ***Utility Billing*** module. It will allow an agent or other roll record to have a specific email applied.

Work Orders: Primarily used for ***Creditor Maintenace*** 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.

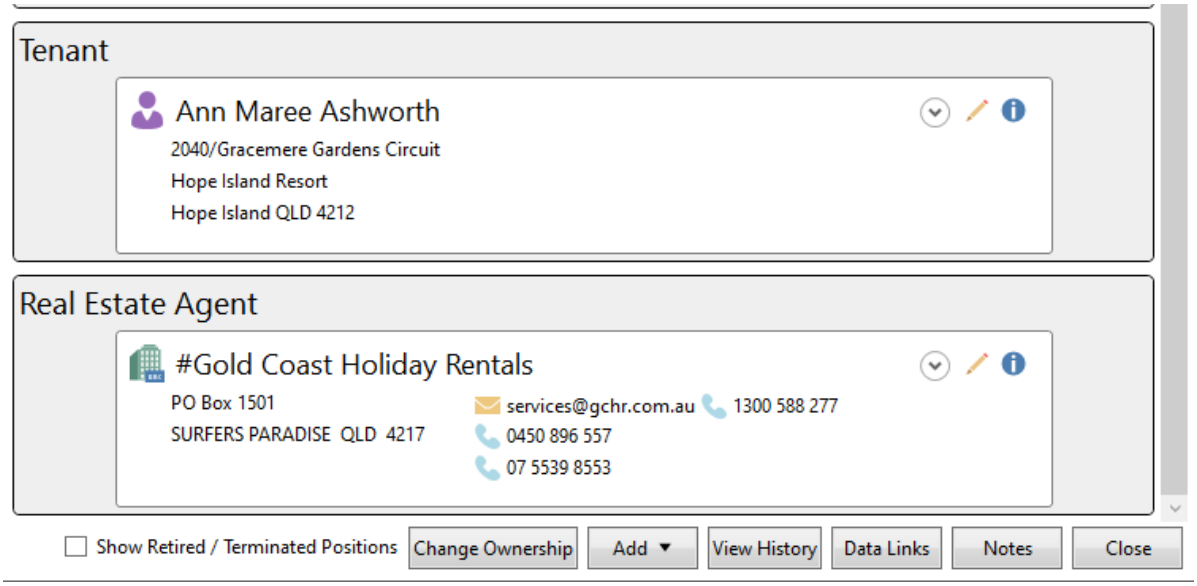
Committee Correspondence: Used for ***Status Report*** (Committee only) report.

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



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.



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).

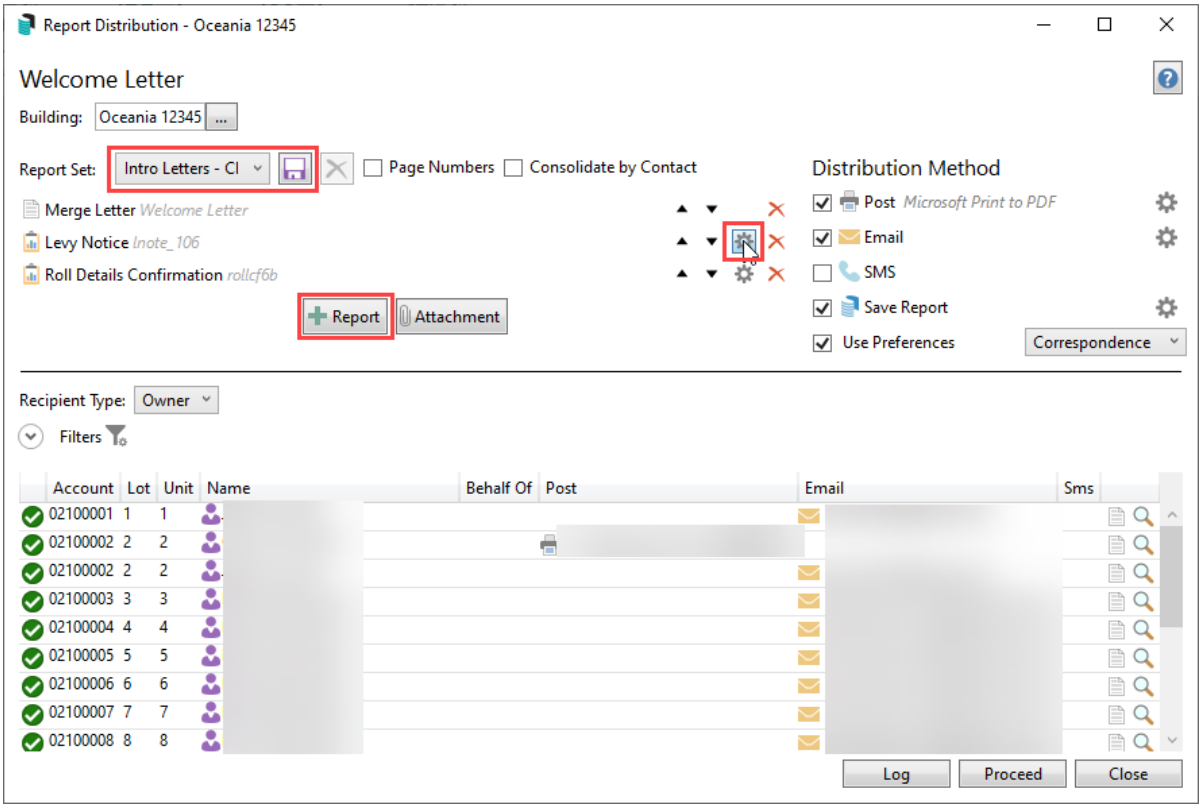
Change of Ownership & Change of Details - System-generated Report Sets

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

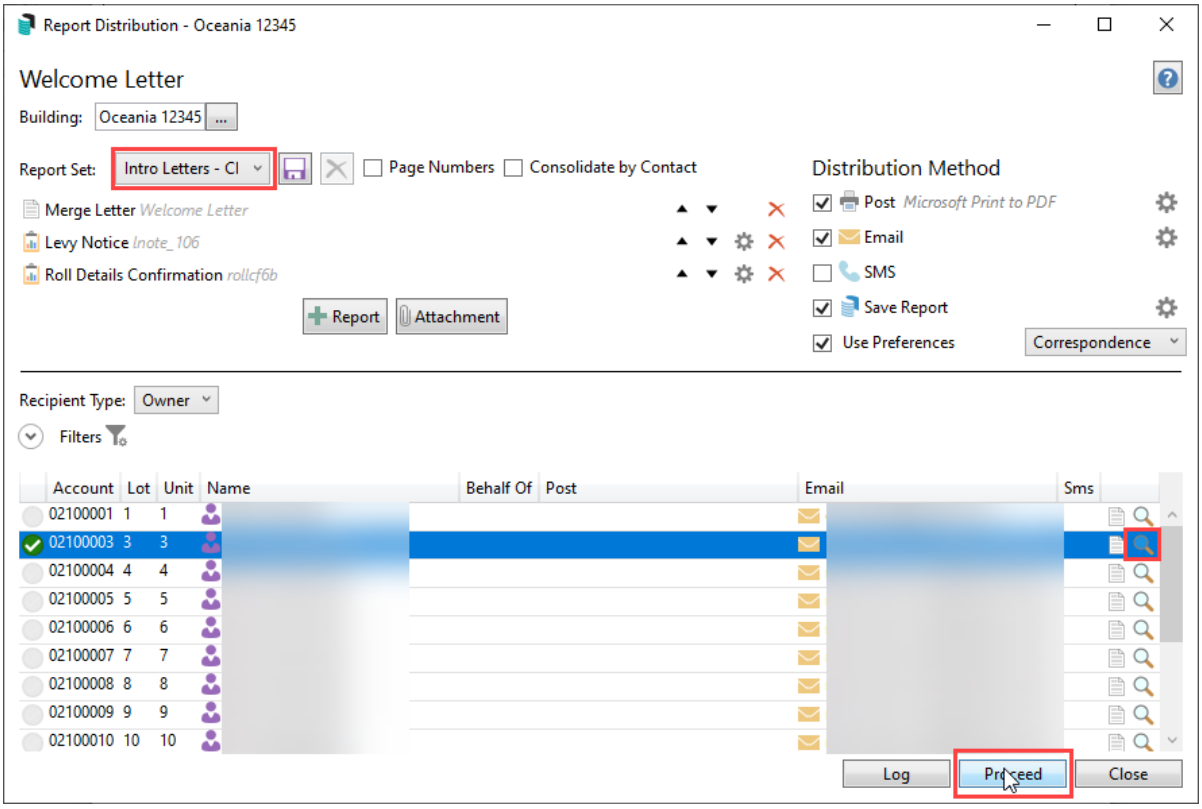
1. Search or select ***Merge Letters***. Click Cancel to the *Merge Letter Report Selection* List.
2. Select *Intro Letters - Change of Details* or *Intro Letters - Change of Ownership* from the Report Set drop-down. Each can be adjusted.
3. Review what has been set, and configure any templates. Example - 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.

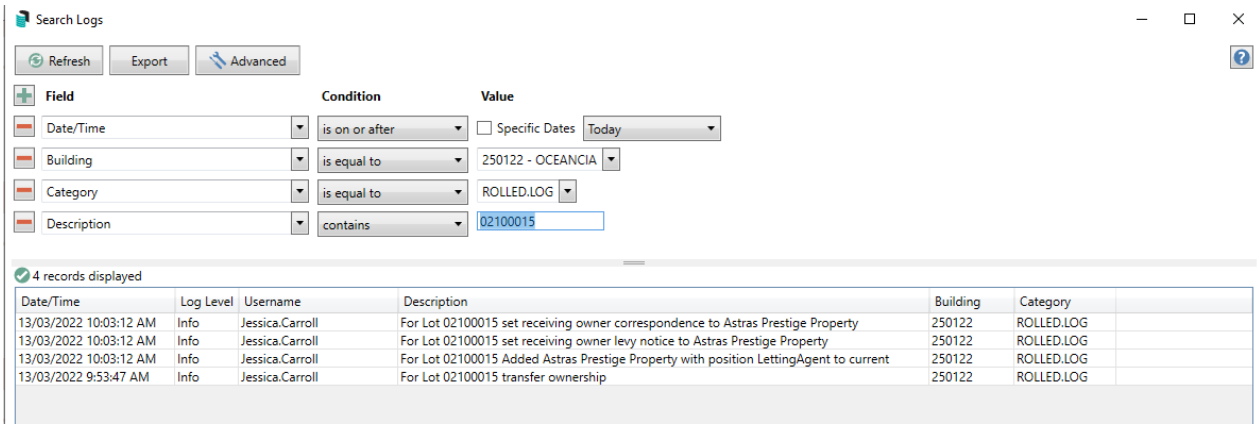
1. Search or select ***Merge Letters***. Click Cancel to the *Merge Letter Report Selection* List.
2. Select the *Intro Letters - Change of Details* from the Report Set drop-down.
3. Review the reports set, and configure or remove any templates. Example - Levy Notice, Roll Details Confirmation by selecting 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.



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

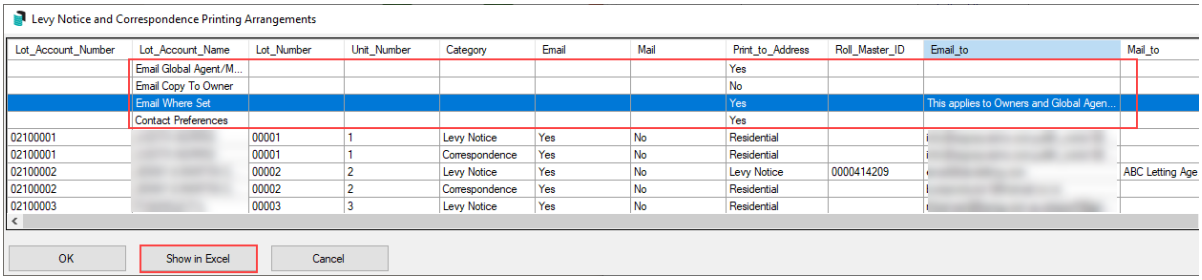
This register offers the ability to enter occupation information specific to a lot account. This offers a report only in this area and does not link with the ***Roll***.

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.



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.

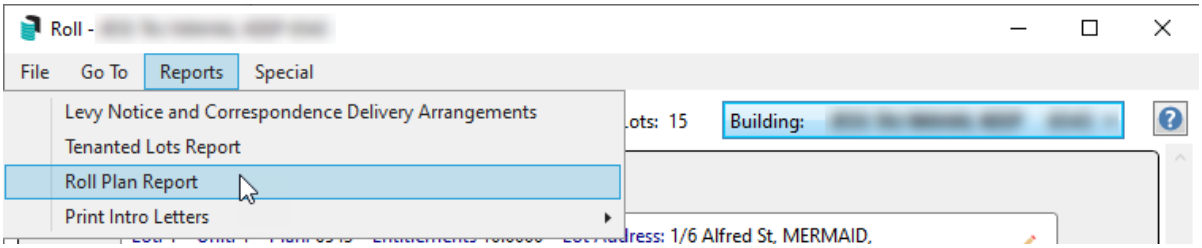
Building Number	Building Name	Account Manager	Number of Lots	Number of Tenanted Lots	% of Tenanted Lots	Name of Tenant Representative
19831	TRAINING SUB GROUPS	StrataMax Training	5	0	0.00	
19832	TRAINING CERTIFICATES		5	0	0.00	
2019	LANA RESORT VII	Lana Clarke	20	3	15.00	Lessee One

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.

Common Questions

How do I locate retired agents in StrataMax?

Retired or terminated agent contacts can be found on the lot account in the **Roll** screen, in the Correspondence Preferences area (used for setting delivery arrangements when an Agent, Mortgagee or Other type is on the lot). Use the **Show Retired / Terminated Positions** option in this area to display any contact, including an agent, that has been terminated from the selected lot account.