

Roll | Configuration and Overview

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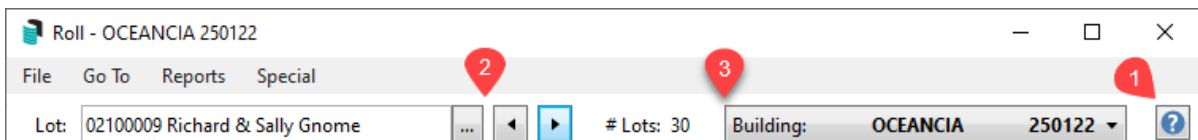


The instructions in this article relate to the **Roll** screen configuration and an overview of its functions, including the various automated roll reports available when changing the ownership of a lot in a building. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

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 to change the lot account and can be used for the forward and back arrows to navigate to a different lot. Or use the ... to select the lot directly.
3. *Building Selection* is for changing to a different building.

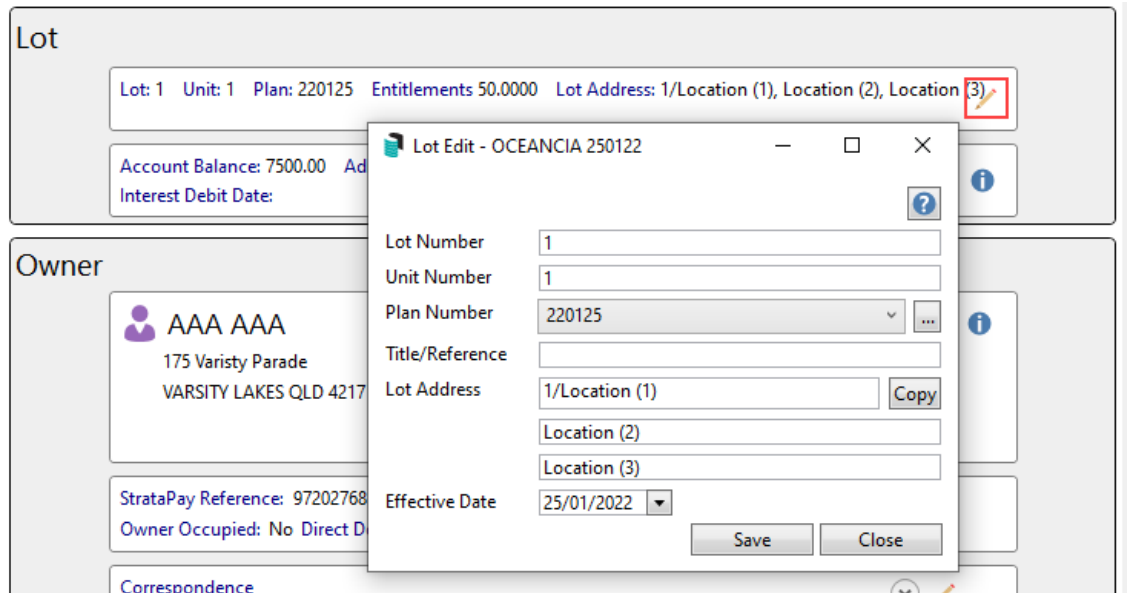


4. Edit Lot Information

The *Pencil* in the 'Lot' section icon is for editing the following fields: *Lot Number*, *Unit Number*, *Plan Number*,

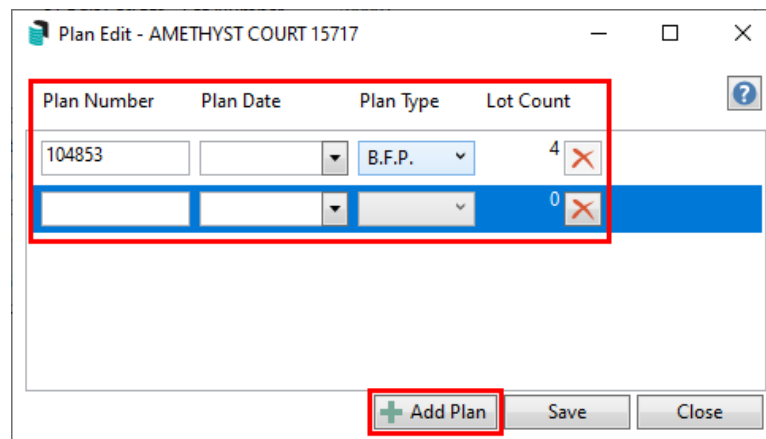
Title/Reference, and Lot Address. For changes to lot entitlements, you will need to complete a [Change of existing lot entitlements](#).

- If there are any data links, there will be a note to confirm this here.



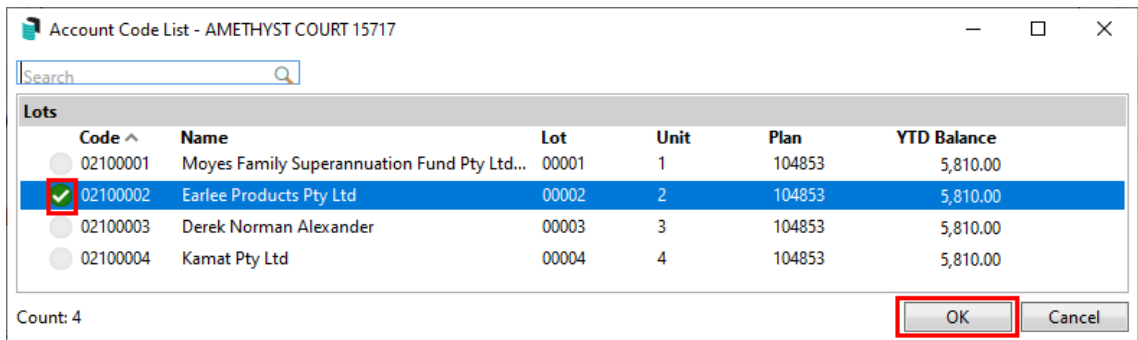
- [Edit Plan Number information.](#)

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. Click [here](#) for further instructions on how to apply different plan numbers.



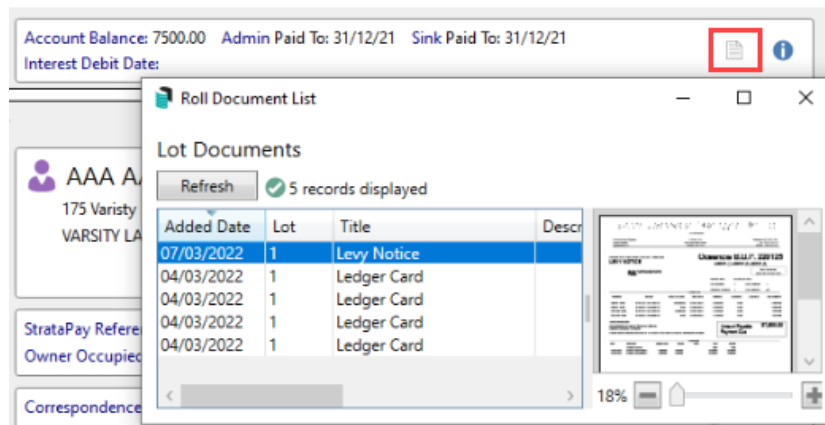
- [Copy Lot Address information.](#)

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*. Click [here](#) for further instructions on how to apply lot address information.



5. 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 e-mail this document or complete any other DocMax function.



6. 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

The Owner section contains the contact information for the current owner of the lot and will be displayed within the Owner section. 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 this icon will appear 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 allow for the information to be edited.

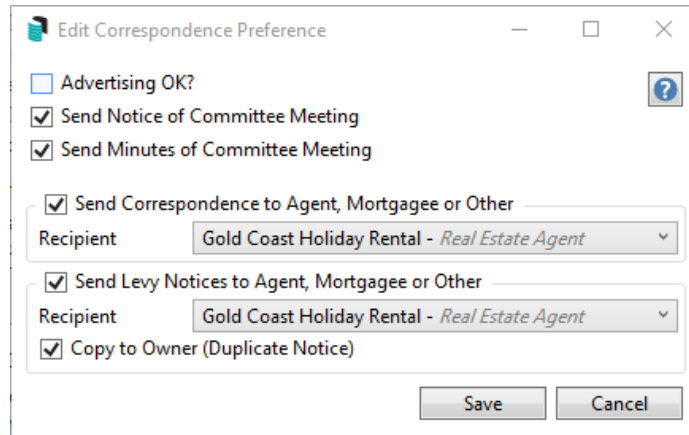
Other information available in this area includes; the *StrataPay Reference* number with the *Direct Debit* status (if applicable), *Car* and *Storage Space* information.

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.

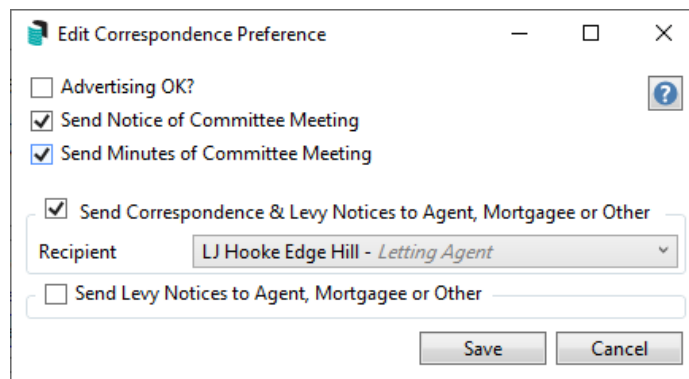
11. **Expand arrow:** This will confirm all delivery methods, including the email addresses for emails and postal information for the post.
12. **Pencil:** Editing the correspondence preferences, including the contact preferences for *Agent, Mortgagees or Other* if not configured for receiving information when adding the contact.



Send Correspondence to Agent, Mortgagees or Other when ticked will allow the recipient to be selected.

Send Levy Notices to Agent, Mortgagees or Other when ticked will allow the recipient to be selected.

Copy to Owner (Duplicate Notice) when ticked will deliver a copy of Levies and Arrears based on the individual contacts for email and mail preferences. If the email or postal address match for the duplicate copy, one copy will be delivered.



Send Correspondence & Levy Notice to Agent, Mortgagee or Other when ticked will allow both the correspondence and levy notice to be selected for delivery for this recipient.

13. **Show Retired / Terminated Positions:** This will display any contact that has been terminated as a contact from the selected lot account.
14. **Change of Ownership:** This will allow for the lot ownership to be changed
15. **Add:** Add another contact type of the selected lot account
16. **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.

17. **Data Links:** Linking Owners who own another lot in the selected building or another is where this can be done.
18. **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
19. **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.

The screenshot displays a contact form with the following sections and fields:

- Postal Address:** Includes a street address field (2116/20 Stuart St), a residential/business dropdown (Residential/Business), and a post code field (TWEED HEADS NSW 2485).
- Phone:** A text input field.
- Email Address:** A text input field containing 'ed@eggs.com'. A dropdown menu is open, showing a list of email purposes with checkboxes: Correspondence, Levy Notice, Utility Billing, Work Orders, Invoice Hub, Committee Correspondence, and Remittance Advice. All are checked. A mouse cursor is over the 'All' button.
- Bank Account:** Fields for BSB, Branch, and Account number.
- Website:** A text input field.
- Delivery Preferences:** A table with checkboxes for 'Send by post' and 'Send by email' for each category:


Category	Send by post	Send by email
Correspondence	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Levy Notice	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Utility Bill	<input type="checkbox"/>	<input checked="" type="checkbox"/>
- Positions:** A section at the bottom of the form.




At the bottom right, there are 'Save' and 'Cancel' buttons.

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
SURFERS PARADISE QLD 4217

 services@gchr.com.au  1300 588 277
 0450 896 557
 07 5539 8553

Show Retired / Terminated Positions

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

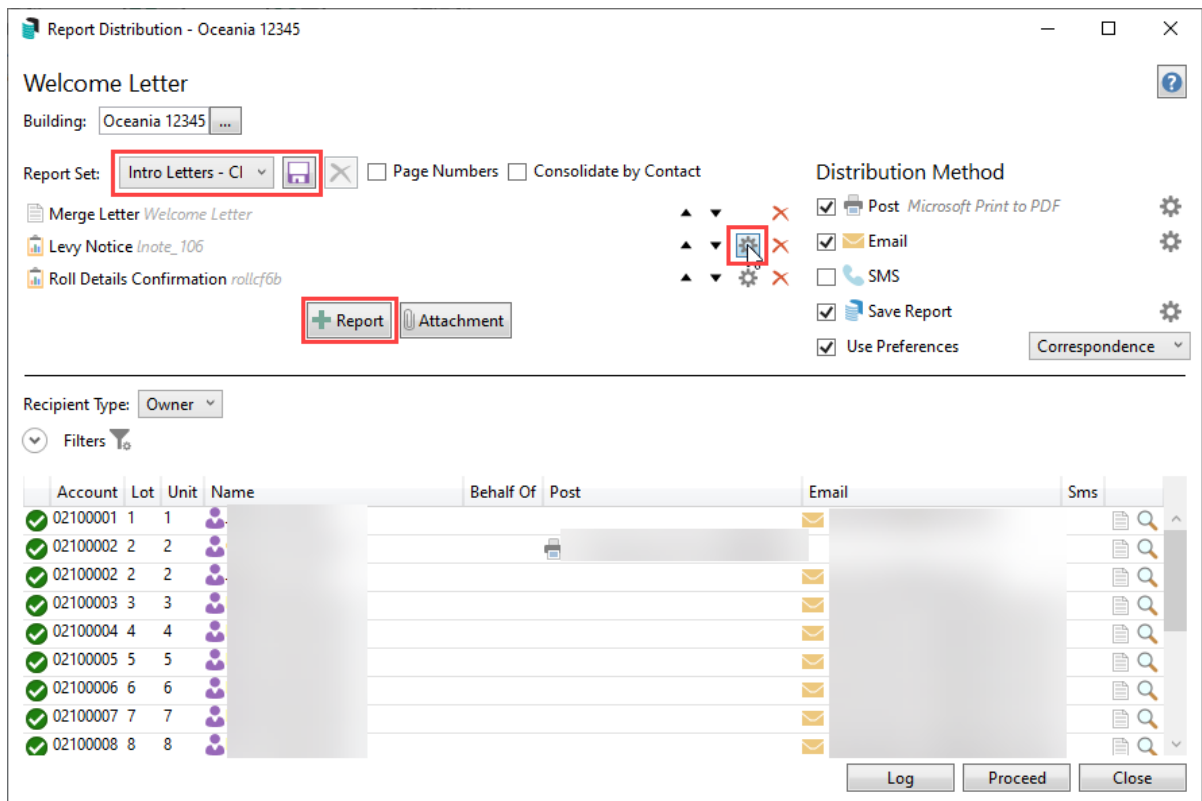
The settings in the Report Distribution window determine what merge letters and reports are configured when a

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.

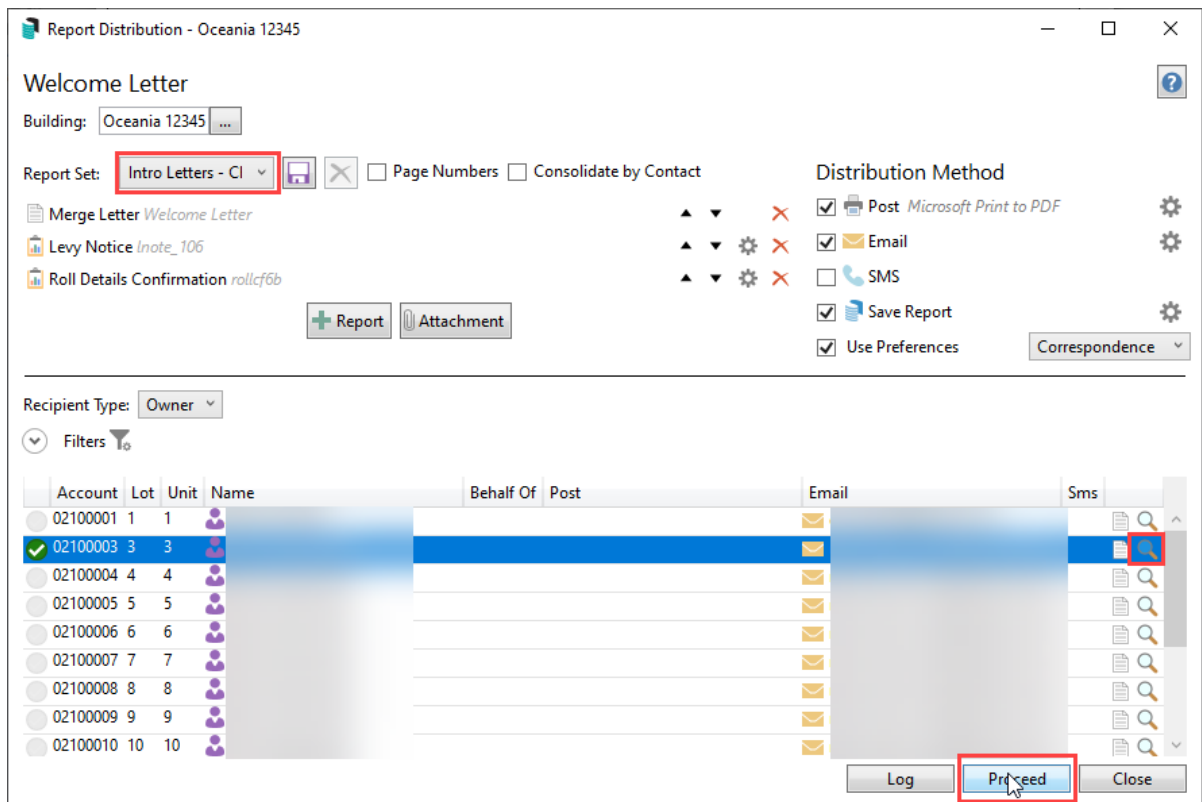
NOTE: If a *Roll Details Confirmation* report has been included in a [Report Set](#) it is recommended that the Confirmation Details Text is reviewed.



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*.

- The selected account will be tagged in the *Report Distribution* window. Click *Proceed* or the *Magnifying Glass* icon to preview the report set.



- 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.

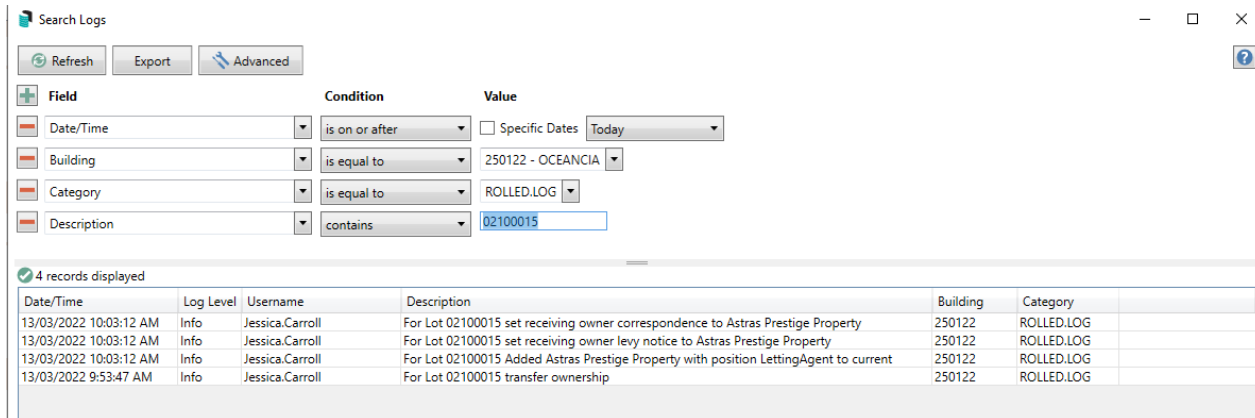
- Search or select **Merge Letters**. Click Cancel to the *Merge Letter Report Selection List*.
- Select the *Intro Letters - Change of Details* from the Report Set drop-down.
- Review the reports set, and configure or remove any templates. Example - Levy Notice, Roll Details Confirmation by selecting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

They are used for importing the .xml file that has previously been exported. 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.

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			

Buttons: OK, Show in Excel, Cancel

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.

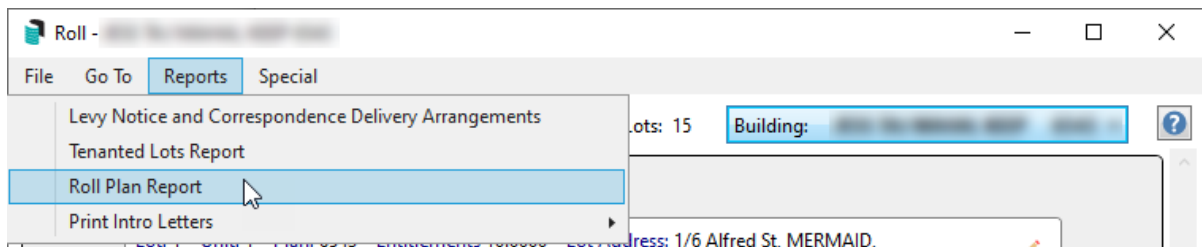
Building Number	Building Name	Account Manager	Number of Lots	Number of Tenanted Lots	% of Tenanted Lots	Name of Tenant Representative
19831	TRAINING SUB GROUPS	StrataMax Training	5	0	0.00	
19832	TRAINING CERTIFICATES		5	0	0.00	
2019	LANA RESORT VII	Lana Clarke	20	3	15.00	Lessee One

When entering the *Lessee* contact in the **Roll**, select *Tenant Representative* to set the contact this member 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.