Search Roll

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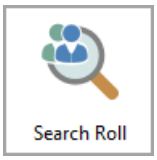


The instructions in this article relate to ***Search Roll***. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Roll is used to report on Roll contact data recorded in ***Roll***. It can be used to find and report on owners, tenants, agents, and other contact types recorded against a lot or building.

This search can assist with everyday tasks such as preparing owner contact lists, reviewing delivery preferences, confirming contact details, and producing reports for all roll contacts. Searches can be run for the currently selected building, multiple buildings, or all buildings, and the results can be saved, exported to Excel, or produced as a PDF-style report.

Searches

Many search screens use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

Search Roll | Security

To access ***Search Roll***, the user or group must have the permission set to *Allow* for *Search Roll* under the *Roll* category in ***Security Setup***.

Search Roll | What it can report on

Search Roll can report on a wide range of roll contact information, including contact names, roll positions, lot and unit details, owner status, phone numbers, email addresses, correspondence details, delivery preferences, representative details, and service of notice addresses.

This makes it useful when a strata manager needs to contact an owner, confirm how correspondence should be sent, identify the correct contact for a lot, or produce a report for a specific type of roll contact.

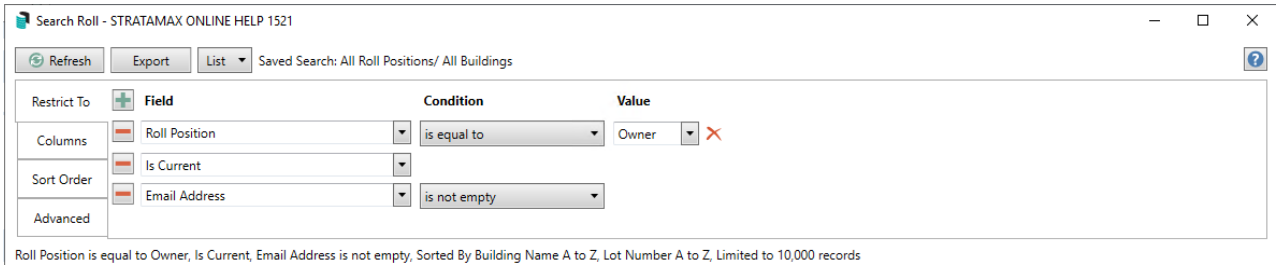
Search Roll | Recommended search examples

The following examples provide practical ways to use ***Search Roll*** for owner and contact reporting.

Global owner email list

This search can be used to produce a list of owner email addresses for export to Excel. The results can then be used for review, follow-up, or upload into a mailing application.

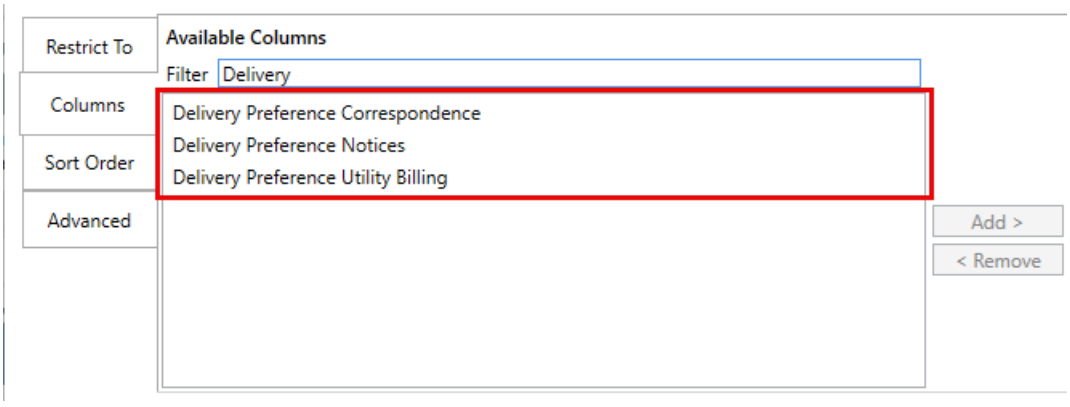
1. Search for or select ***Search Roll***.
2. Set the search to return owner records.
3. Add a restriction so only records with an email address are returned.
4. Ensure the email address column is displayed in the results.
5. Click *Refresh*.
6. If required, click *Export* to produce the report in Excel.



Global owner delivery preferences

This search can be used to produce a list of owner delivery preferences for correspondence and notices, for the currently selected building, multiple buildings, or all buildings.

1. Search for or select ***Search Roll***.
2. In *Restrict To*, add the *Is Current* restriction so only current records are shown. To list owners only, also add a restriction on *Roll Position* for Owner.
3. From the *Columns* tab, include *Delivery Preference Correspondence* and *Delivery Preference Notices*. *Delivery Preference Utility Billing*, *Email for Correspondence* and *Email for Levy Notice* can also be added.



4. Click *Refresh*.
5. If required, click *Export* to produce the report in Excel.

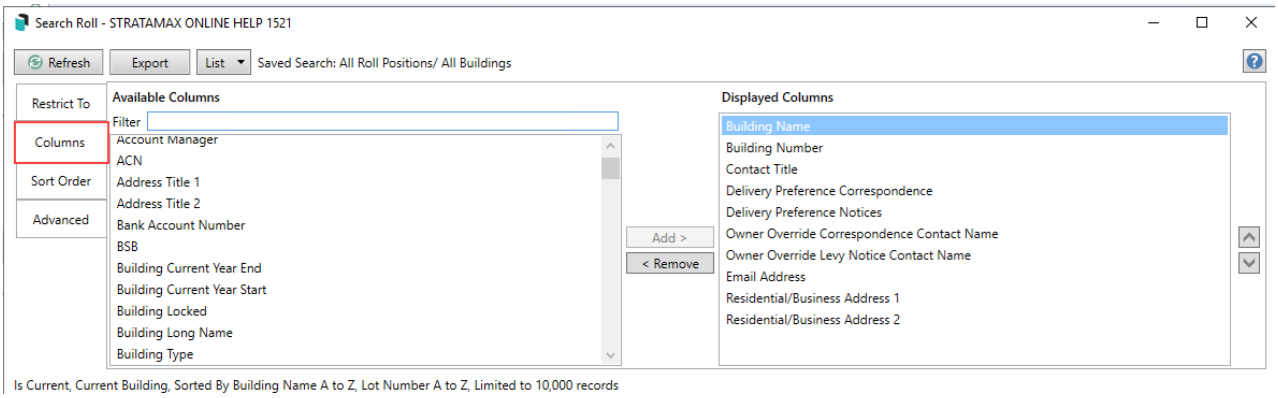
Delivery Preference Notices shows *Email*, *Post* or *None* for each contact row, as set in the ***Roll***. Agents, tenants and mortgagees each have their own row, which is why the *Roll Position* restriction is used to list owners only.

To find owners whose delivery preferences are set to another contact, such as an agent, use the next example.

Owners with delivery preferences sent to Agent or Other

This search can be used to identify owners whose delivery preferences are set to another contact, such as an agent or other nominated contact.

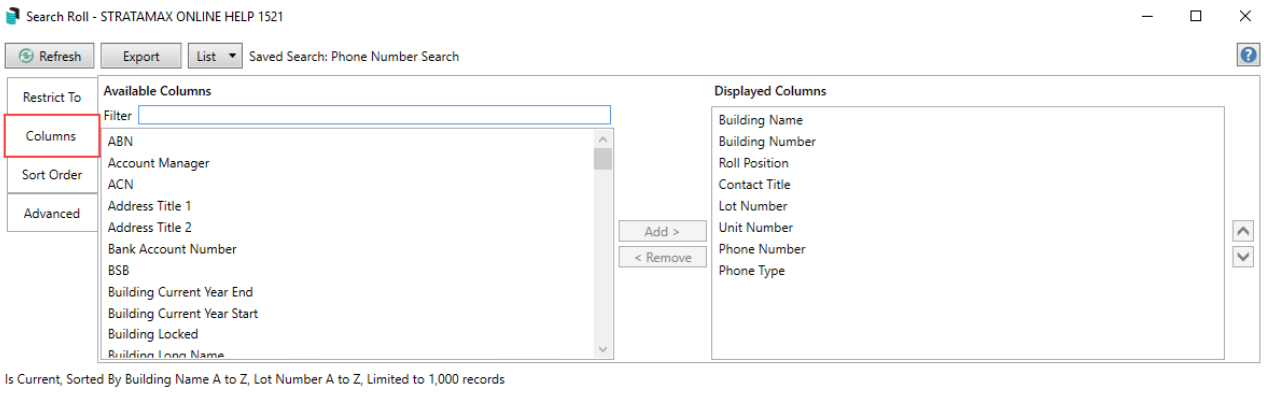
1. Search for or select ***Search Roll***.
2. Set the Restrict To fields
3. Using the Column tab, include:
    - Delivery Preference Correspondence
    - Delivery Preference Notices
    - Owner Override Correspondence Contact Name
    - Owner Override Levy Notice Contact Name
4. Apply a sort order if needed from the Sort Order tab.
5. Click *Refresh*.
6. If required, export the results for follow-up or review.



Phone Number Search

This search can be used to find contacts by phone number and identify where that contact is recorded within the Roll data.

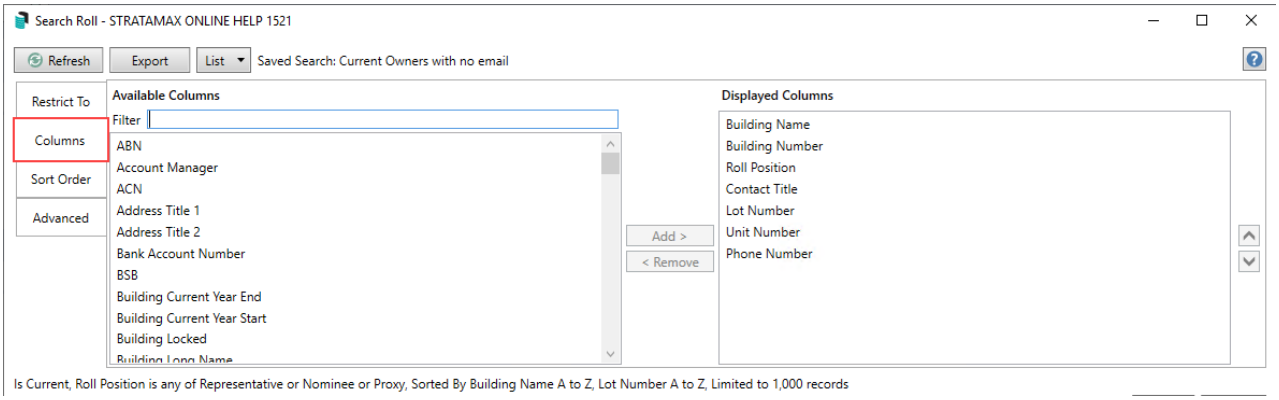
1. Search for or select ***Search Roll***.
2. Set the search to return current owner records and include the *Phone Number* field using the contains *Condition*.
3. Using the *Columns* tab as a baseline for display, include the *Contact Title* and *Phone Number* fields. Others can be added.
4. Click *Refresh*.
5. Export or print the report, if required.



Current owners without an email address

This search can be used to identify current owners who do not yet have an email address recorded. This type of search can assist in contacting contacts to add their email addresses to their accounts, or provide a mailing list for any distribution set for post.

1. Search for or select ***Search Roll***.
2. Set the search to return current owner records, with a secondary field of restriction*Email Address* using the Is Empty *Condition.*
3. From the Columns tab, display the Contact Title, Lot details, Phone Number, and correspondence address columns as required.
4. Click *Refresh*.
5. Use the results to follow up and update missing contact details, if required.

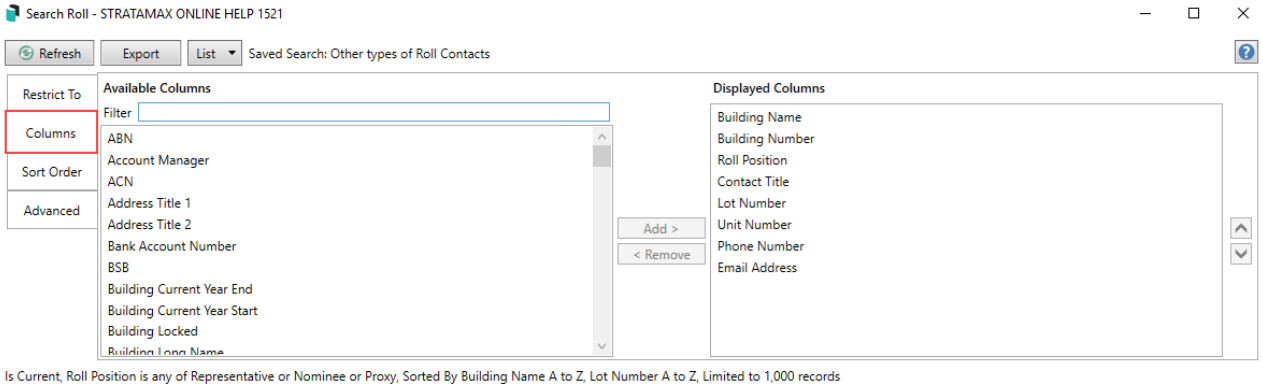


Owners with Proxy or Other type of contact

This search can be used to identify owners with a proxy or other type of contact recorded on their behalf in the Roll. This type of information can assist with meeting processes, and understanding who is representing the owner's account.

1. Search for or select ***Search Roll***.
2. Set the search to return owner records, with a secondary field of restriction*Roll Position* using the Is Any Of *Condition*, and selecting Proxy, Nominee and Proxy types.

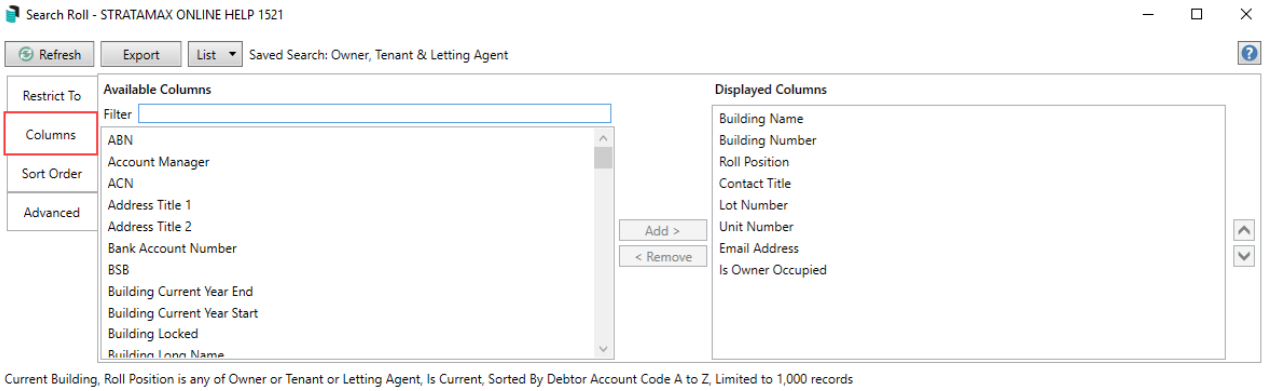
3. From the Columns tab, display the Contact Title, Roll Position, Lot details, Phone Number, and Email Address.
4. Click *Refresh*.

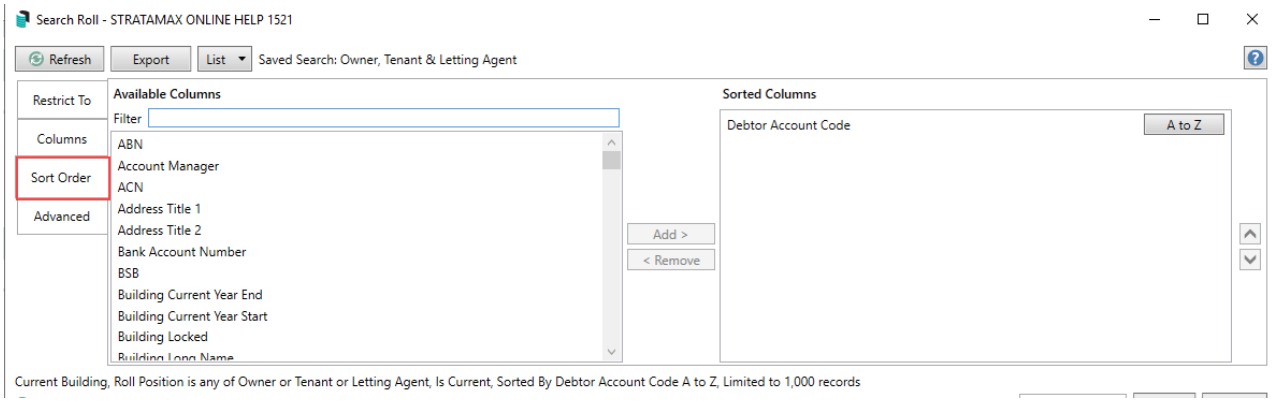


Owner, Tenant and Agent

This search will report Owner, Tenant and Agent information recorded for Roll records. To group the records by debtor account, this search will use the *Debtor Account Code sort order*.

1. Search for or select ***Search Roll***.
2. Set the search to return owner records, with a secondary field of restriction*Roll Position* using the Is Any Of *Condition*, and selecting Proxy, Nominee and Proxy types.
3. From the Columns tab, display the Contact Title, Roll Position, Lot details, Phone Number,
4. Using the Sort Order tab, include the Debtor Account Code in the sorted columns area. This will group the records by account.
5. Click *Refresh.*





Owners with a StrataPay Direct Debit

This search will locate Owners who have a StrataPay Direct Debit and includes a column displaying the type of direct debit in place.

1. Search for or select ***Search Roll***.
2. Set the search to return current owner records, with a secondary field restriction on*Direct Debit Schedule Type* using the Is Any Of *Condition*, selecting all available types.
3. From the Columns tab, display the Contact Title, Lot and Unit details and Direct Debit Schedule Type.
4. Click *Refresh.*

