

Release Notes – Roll Submissions

StrataMax has been dedicated to meeting the needs of Strata Managers for over 30 years through the continual enhancement of our software suite. We are committed to providing new functionality to support you in servicing your clients and to provide opportunities for you to optimize efficiency within your office environment.

This document describes exciting new features and enhancements available in the above release.

A history of Release Notes can be reviewed on the [StrataMax Online Help](#)



THE COMPLETE STRATA MANAGEMENT SOLUTION



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My Info – View/Change Details and Roll Submissions Overview

The My Info – Change Details portal page and Roll Submissions module in BCMax have been refreshed and will allow contacts to be updated via the portal and updated in BCMax. Some new features have also been added including more control for managers over how the My Info – Change Details page is used and enhanced usability for owners accessing the My Info – Change Details page.

Please Note: The new Roll Submission module will not be switched on for clients who still have outstanding submissions in the old system. Once those are processed, the new process will be switched on by the Development Team.

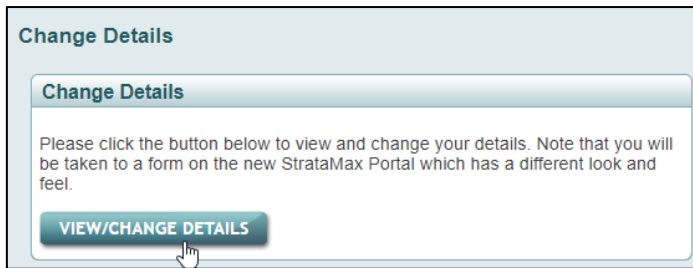
1. My Info – View/Change Details – StrataMax Portal

1.1 Change or update owner contact details and delivery preferences

On the StrataMax portal, owners who have created an account can access the My Info / My Details page and do the following:

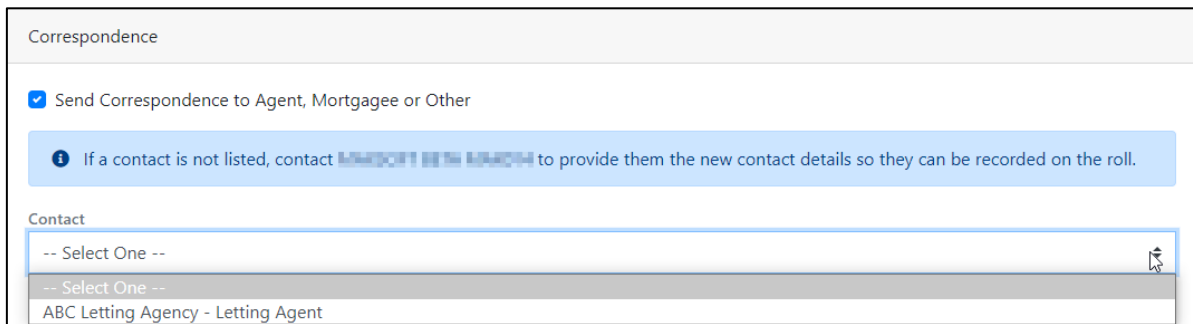
- Review current details for a property
- Change or add Home, Business, Mobile and Fax numbers
- Change or add email addresses
- Change owner contact delivery preferences
- Set whether Notice address or Levy only notice address is different to the Residential address
- Set whether Committee and Meeting Notices should be sent (currently QLD only)
- Add a second submission even if pending submissions have not yet been approved

To access the new page log into the portal as an owner, select the required property, click My Info, select My Details tab and click VIEW/CHANGE DETAILS



1.2 Delivery preferences - send Correspondence to Agent or Other (NEW)

Owners can also now select if their Correspondence or Levy Notices are to go to the Agent or Other contact (e.g. Nominee) using the drop-down selector. Only Agents or Other contacts already set up in the Roll can be selected here.



Please Note: Setting this will only affect the selected property. Other lots owned by the contact will not be modified.

1.3 Delivery preferences - send Levy Notices to Agent or Other (NEW)

Owners can also now select if their Levy Notices should be sent to the Agent or Other contact (e.g. Nominee) using the drop-down selector. Only Agents or Other contacts already set up in the Roll can be selected here.

Levy Notice

Send Levy Notice to Agent, Mortgagee or Other

i If a contact is not listed, contact ~~MAXSOFT BETA MAX014~~ to provide them the new contact details so they can be recorded on the roll.

Contact

-- Select One --

-- Select One --

ABC Letting Agency - Letting Agent

1.4 Copy to Owner option (NEW)

Owners can also now select if their Levy Notices should be copied to the owner/ owners.

Levy Notice

Send Levy Notice to Agent, Mortgagee or Other

i If a contact is not listed, contact MAXSOFT BETA MAX014 to provide them the new contact details so they can be recorded on the roll.

Contact

123 Letting Agency - Letting Agent

Copy to Owner

Your Delivery Preferences
The below relate to your delivery preferences, not Agent, Mortgagee or Other.

Email

Post

The Change Details page will also show if other there are other lots / properties that will be affected by the change.

Change Details

i The contact details for the following properties will also be updated: Testing Tower (98721) - Unit 2 (Lot 2), Testing Tower (98721) - Unit 3 (Lot 3)

1.5 Changes pending approval

The Change Details property selector page will show which lots have changes pending that have not yet been approved in BCMax.

Change Details				
	Building Name ↕	Building Number ↕	Lot Number ↕	Unit Number ↕
Select	⚠ Testing Tower	98721	1	1
Select	⚠		2	2
Select	⚠ Testing Tower	98721	3	3

There is currently a change pending approval by MAXSOFT BETA MAX005.

The Change Details page will show which fields have changes pending that have not yet been approved in BCMax

Your Delivery Preferences
 The below relate to your delivery preferences, not Agent, Mortgagee or Other.

Email ⚠ Pending change from: Do not Send
 Email


1.6 Add multiple email addresses (NEW)

Owners can now add multiple email addresses by clicking the ‘+ Add email address’ or ‘+ Add phone Number’ buttons..

Click ‘+ Add email address’ to add additional email addresses. Add the address in the new field and click Save to submit the request.

Email Addresses

amstester@email1.com 



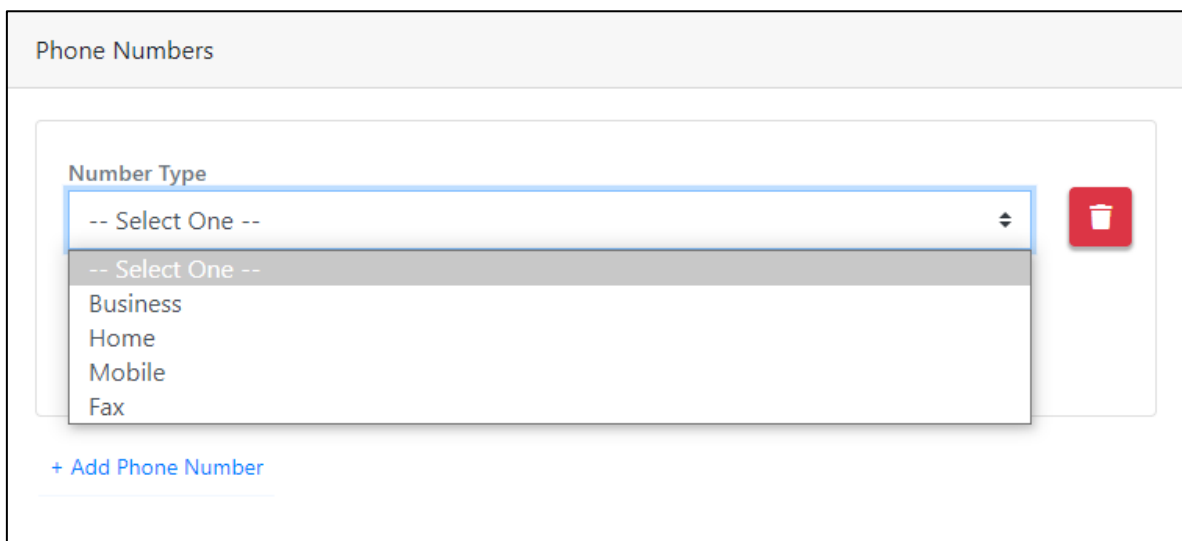
[+ Add Email Address](#)

The additional address will be imported to the contact card once the submission is approved.

Click the Trash icon to remove an email address.

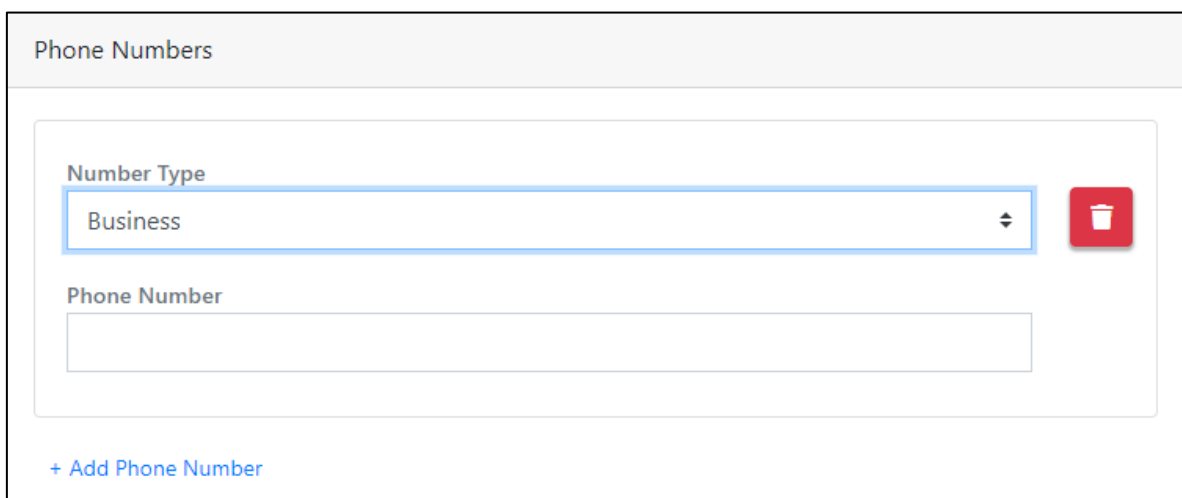
1.7 Add multiple phone numbers (NEW)

Owners can now add multiple phone numbers by clicking the '+ Add phone Number' buttons. Use the drop-down selector to select which type of phone number you are adding.



The screenshot shows a 'Phone Numbers' section with a dropdown menu for 'Number Type'. The dropdown is open, showing options: '-- Select One --', Business, Home, Mobile, and Fax. A red trash icon is visible to the right of the dropdown. Below the dropdown is a '+ Add Phone Number' button.

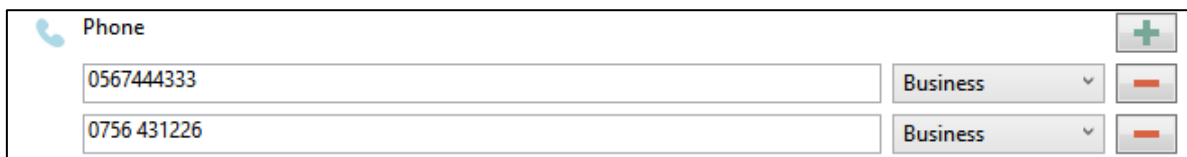
Enter the number into the new field and click save to submit the request.



The screenshot shows the 'Phone Numbers' section with the 'Number Type' dropdown set to 'Business'. A red trash icon is visible to the right of the dropdown. Below the dropdown is a 'Phone Number' input field. Below the input field is a '+ Add Phone Number' button.

Click the Trash icon to remove a number.

You can also add multiple numbers of the same type. For example, if two Business numbers are added on the portal, both will be imported to the contact card once the submission is approved.



The screenshot shows a contact card interface with a 'Phone' section. It contains two input fields, each with a phone number and a dropdown menu set to 'Business'. A green plus icon is in the top right corner, and a red minus icon is in the bottom right corner of the section.

Phone Number	Type	Action
0567444333	Business	Remove
0756 431226	Business	Remove

Please Note: Once a phone 'type' has been saved and accepted, it cannot be changed and must be deleted and re-entered as the new type.

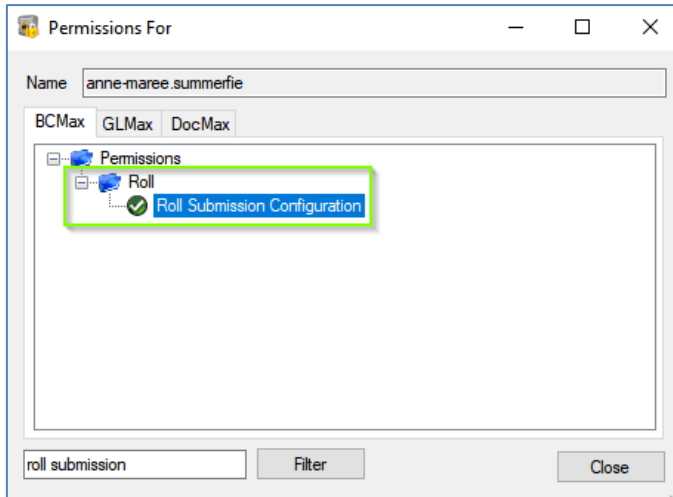
2. Roll Submission – BCMax

The Roll Submissions module interface in BCMax has been enhanced and now includes some configurable options to give managers more control over how their owners use the Roll Submissions feature.

2.1 New Roll Submission Configuration Security Permission

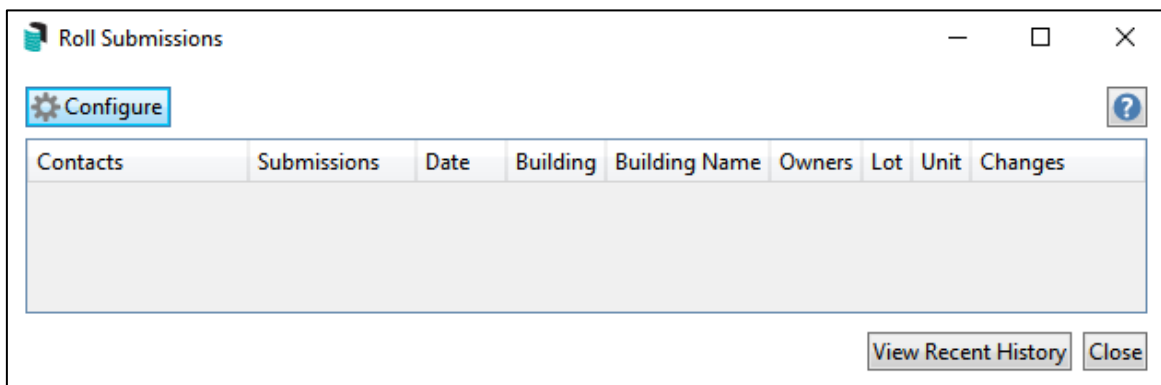
Access to these configuration options are managed by Security control 'Roll Submission Configuration' and will be set to 'Deny' on upgrade. The permission setting will need to be reviewed in Security set up to enable the options.

Navigate to the Security Set up screen and use the filter to search 'Roll Submissions Configuration'. This will return the Roll Submissions Configuration control. Right click to set to Allow / Inherit / Deny as required.



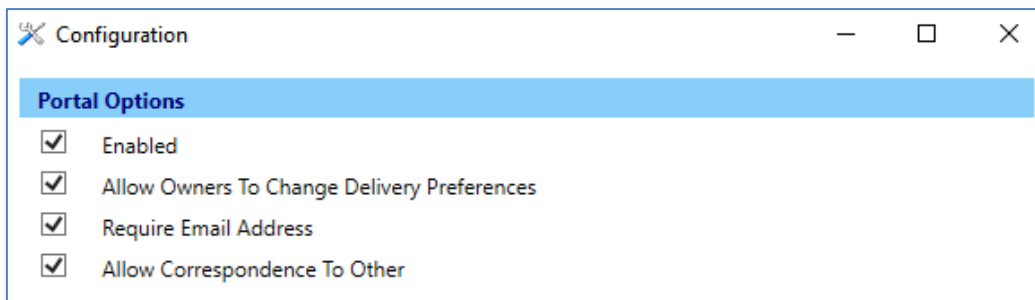
2.2 New Roll Submission Configuration Options

New configuration options are available in the Roll Submission module. Click the configuration icon to open the Configuration window.



The new configuration options are as follows:

- **Enabled** - Enable or disable change of details on the portal page
- **Allow owners to Change Delivery Preferences** - Enable or disable ability for owners to change Delivery Preferences on the portal page
- **Require Email Address** - Requires owners to always specify an email address when making changes
- **Allow Correspondence to Other** - Allow selection of Agent / Mortgagee or Other for Correspondence and Notices



On upgrade, access to the My Info – Change Details page will be automatically enabled if this is already the currently enabled. 'Allow Owners to Change Delivery Preferences' will also be enabled if this is already currently enabled. 'Require Email Address' and 'Allow Correspondence to Other' will be disabled by default on upgrade.

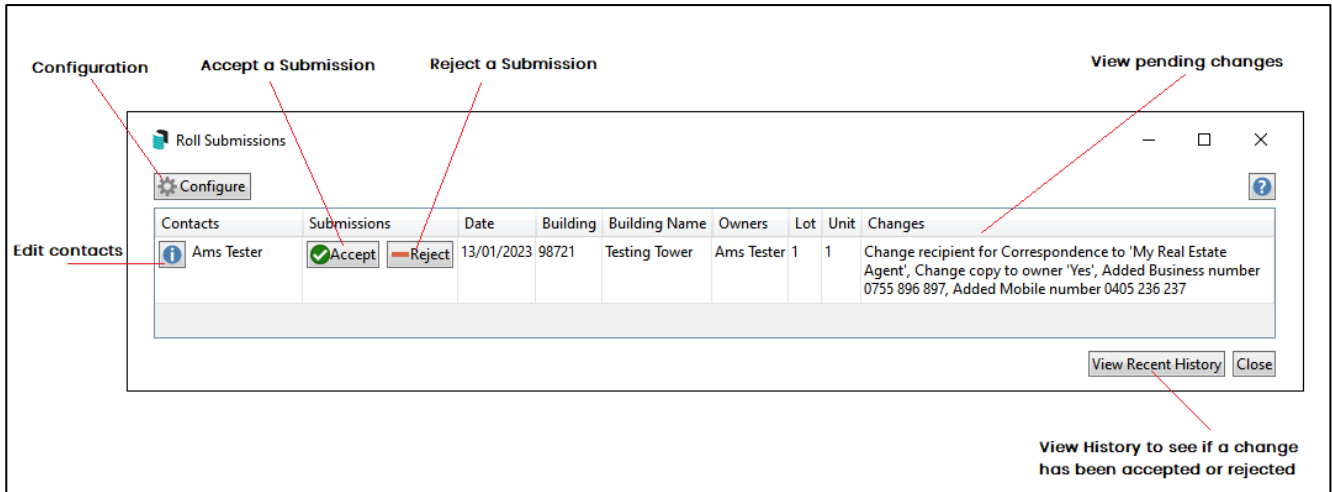
If 'Allow Correspondence to Other' is unchecked, the option to select Agent, Mortgagee or other will not be displayed on the portal.

2.3 Roll Submissions in BCMax

2.3.1 New Roll Submission screen

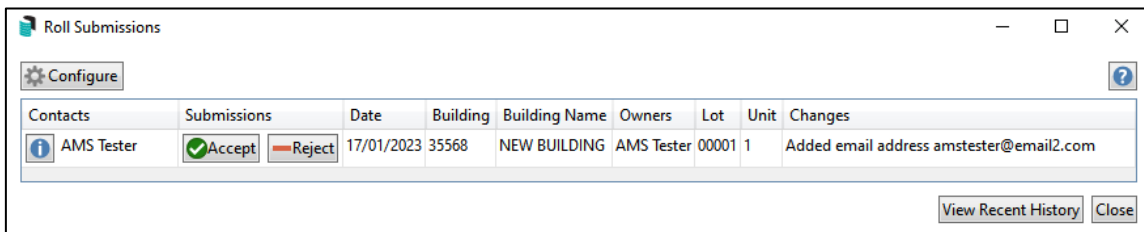
The new Roll Submission screen in BCMax can be accessed selecting the "Roll Submissions" menu item in BCMax. This module provides the following features:

- Manage Portal configuration options
- Accept or Reject a Submission
- Review pending changes
- Edit a contact
- View recent history of accepted or rejected changes

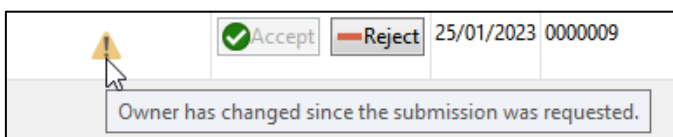


2.3.2 Review / Accept / Reject a Submission

Changes submitted on the portal can be reviewed in the 'Changes' column. Click the 'Accept' button to update the contact card and/or delivery preferences for the Lot. If the details do not look correct or require modification, click the 'Reject' button to prevent the change. Once Accept or Reject has been clicked, the record will be removed from the unprocessed submissions screen.

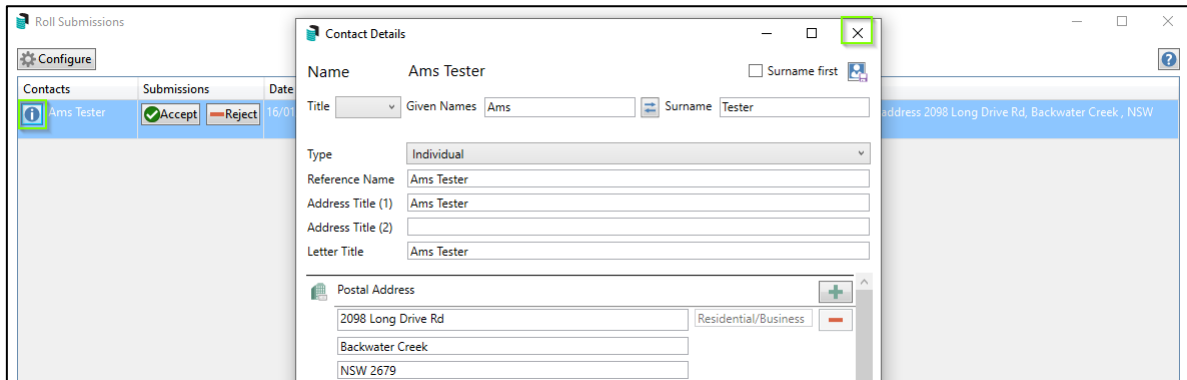


Please Note: If a contact record has been changed since the submission was sent (e.g. contact has since been merged as duplicate), a warning icon will be displayed and the "Accept" option will be disabled.



2.3.3 Edit a contact

From time to time managers may need to modify the details that are submitted. If they don't match standard formatting or if an obvious typo has been made. To do this, click the 'i' icon and edit the contact manually. Click the 'x' too save and close the record.



2.3.4 View Recent History and Roll Change Log

Once a submission is rejected or accepted, a record will be added to the Recent History log. Click 'View Recent History' to open the log. Further details of the change will be logged under the Change Log in the Roll if the submission is accepted.

Please Note: The Roll Submission Dashboard item will update unprocessed submission data after the building upload process has completed each night.

For more information regarding the Roll Submission process please navigate to [Roll Submissions | Online Help \(stratamax.com\)](https://stratamax.com/roll-submissions-online-help)