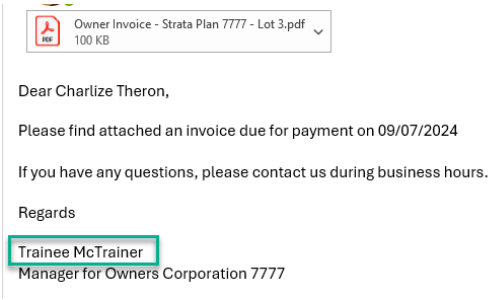
Understanding Manager Name on Levy & Remittance Emails from Strata Master

Summary

Email Templates have insert fields for the name of the Strata Plan Manager. These insert fields may pull the name from different locations, potentially showing different names. Learn how these insert fields can be updated if incorrect.



Covered in this article:

- Where to Find Email Templates
- Insert Field for Manager Name
- Manager Name on Email Remittance Template
- Manager Name on Levy Notice Email Template
- Manager Name on Other Email Template

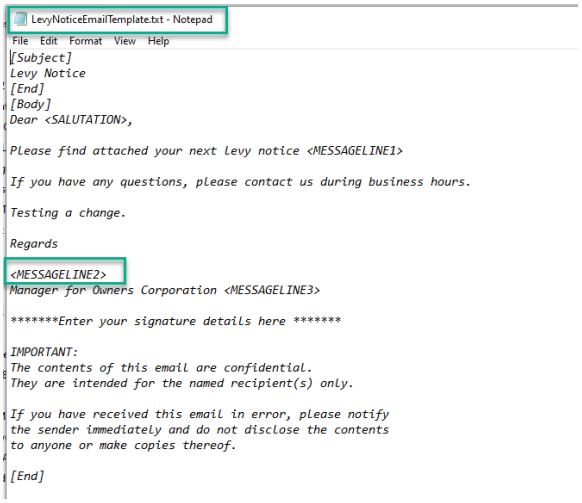
Where To Find Email Templates

The Template folder on your Server will hold the email templates. Note this path - \\SERVER\Strata$\Template.

The server is only C drive if you are working on the server, otherwise the server will have a different alphabetical letter. If you are unsure where your server is, enquire from a colleague or your IT.

Insert Field For Manager Name

The insert field that pulls the Strata Manager's name in the Template is <MESSAGELINE2>, as highlighted below. <MESSAGELINE2> does not always pull the name from the same field in Strata Master. This is dependent on the report.



Manager Name on Email Remittance Template

The template for this function is saved in the Template folder as EmailRemittanceTemplate.txt. Do not rename this template.

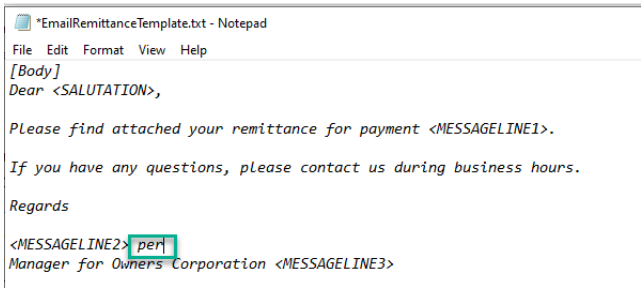
The <MESSAGELINE2> for this template will pull the name from the user that is logged in and processing the remittances.

Should a Supplier or Creditor have a query about their invoice payment, they can then be directed to speak to the person processing Levies, who is often in the Accounts team. This assists to reduce the Strata Managers workload.

To Change The Name Reflected On The Email

If you wish to have this reflect the Strata Managers name then the Strata Manager would need to be logged in and issuing the Payments.

If you wish, you could add the word 'per' to the Template after <MESSAGELINE2>, which means 'for' or 'on behalf of'.



When The Email Address Is Not Recognised By Creditors

We recommend you speak to your IT. Your IT can provide a generic email address in Outlook, that can be selected in Outlook when making payments.

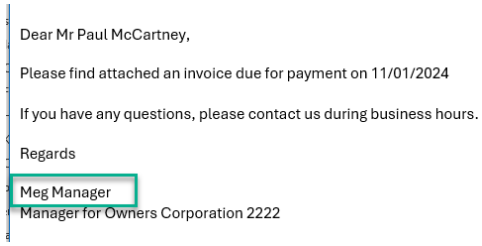
Alternatively there is an emailing facility called SMTP, also setup and managed by your IT.

Manager Name on Levy Notice Email Template.

The template for this function is saved in the Template folder as LevyNoticeEmailTemplate.txt. Do not rename this template.

The <MESSAGELINE2> for this template will pull the name from the user whose name is on the Corp screen as the Strata Manager.

Should a Lot Owner have a query about their Levy, this directs their call or communication to the Strata Manager.



To Change The Name Reflected On The Email

When there has been a change of Strata Manager -

- for one Plan, edit the Manager name in the Corp screen, or
- for a bulk change of Manager on a number of Plans, navigate to Utility > Change Manager. There is also a video available to show this change process.

When The Email Address Is Not Recognised By Lot Owners

We recommend you speak to your IT. Your IT can provide a generic email address in Outlook, that can be selected in Outlook when making payments.

Alternatively there is an emailing facility called SMTP, also setup and managed by your IT.

Manager Name on Other Email Template.

As mentioned above, the name inserted for <MESSAGELINE2> will be either the person/user that is logged in or the person listed as Strata Manager on that Strata Plan.

Examples are -

AnnualNoticeofLeviesEmailTemplate

IndividualReminderEmailTemplate

InterimReportEmailTemplate

OwnerInvoiceEmailTemplate

WordOrderEmailTemplate

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