

TRAINING REFERENCES

STRATA Master Version 9.1 delivers even greater functionality to help you streamline your daily tasks. For more information see the Version 9.1 [Release Notes](#) on the Rockend Knowledgebase.



Rockend Knowledgebase

In STRATA Master go to Help > Knowledgebase
All staff can now access the Rockend Knowledgebase without needing a username or password.

Corp Screen Changes

The Executive tab on the Corp screen is now the **Committee** tab

Nominated By

- Record which Lot nominated a Committee member in the **Nominated by** column on the Committee tab of the Corp. screen.
- On upgrade, this will default to None
- This information is included on the new **Committee Meeting Attendance Register** report.

Committee Meeting Attendance Register

The report includes:

- Lot details, Position on Committee, Voting Rights, Name on Title, Nominators Lot Number, Lot arrears/prepaid as at the arrears cut of date

To generate the report, go to:

1. Formatted reports > Strata Mgt Reports
2. Select Strata Committees Meeting Attendance
3. Enter Owners Corp, Meeting date & Arrears cut off

Macquarie Bank - DEFT Update

Changes have been made in STRATA Master to support the Australia Post processing fee charged by Macquarie Bank.



Levy Wizard - Default Messages

Create default messages to be included in notices issued via the Levy Wizard. This can be set up at the Agency or Owners Corporation level.

To set Default Messages:

1. Configure > Levy Wizard > Agency/ Owners Corp
2. Enter your message for each notice type
3. Save

When producing any notice:

- The Owners Corp Message will display
- The Agency default message displays when no Owners Corp message is set
- You are still able to manually enter a message in the Additional Comments box



After saving a default message, print a sample notice to preview the text and formatting



Status Certificate Workflow

The new Status Certificate workflow makes it easier to calculate any arrears to the time and date of settlement. Use Quick Reports to view the history of Status Certificate requests for a lot or plan.

Current Owner Account

This is a report produced from the Lot Owner screen, it details any interest or arrears owing to date of settlement.

To produce the report:

1. On the Lot Owner screen, Click Update Status Certificate button
2. Enter Date of Settlement
3. Click OK to produce the report

View History

Quick Reports > Lots > Show Status Certificate History

In the results sections you can view:

- The plan/lot number
- Name of requestor
- Time & date certificate was produced
- Amount Due
- Settlement Date

Track Agency Agreements

- A new Reminder, Agency Agreement, has been included to notify you of upcoming expiring agency agreements.
- Two columns Communication Sent & Date Sent, have been added to the Contract Register to record if and when communication has been sent about expiring Agreements.

To track Agency Agreements:

1. Add the Agency Agreement to the Contract Register as normal
2. Go to Manage > Reminders Configuration & select Agency Agreement
3. A reminder will be sent if the Communication Sent column on the Contract Register is set to **No**



fileSMART 7.5

- When auto-archiving General Meeting docs from STRATA Master, you can now elect to publish on the Owners & /or the Committee portals.
- Filter plans in fileSMART by the status of Managed, Unmanaged or All Plans. This is available in both Archive and Search modes.

For more details, see [What's New in fileSMART](#) on the Knowledgebase