Release Notes

Version 10 9 July 2018



# STRATA Master



## **Feature Summary**

### **Delegated Functions Reporting**

A new delegated functions report to combine standard annual reports into one for a plan

# Pre-meeting online voting via the Owner and Committee Member portals

Using the Meeting Master Wizard in STRATA Master, you can now set up online pre-meeting voting for General Meetings

### Multiple Dissection Invoices using fileSMART Invoicing Workflow

STRATA Master Version 10 with fileSMART Version 7.8 introduces the ability to process an invoice with multiple dissections

### Option to include Sub-meter Invoices in the Quorum Calculation

A new option is available to include outstanding sub-meter invoices in the Quorum calculation

### View Linked Invoices in fileSMART Archive in STRATA Master

In various places in STRATA Master, to make viewing related invoices easier, there is now a link to the invoice in fileSMART

### **Estimated Commissions on the Insurance Policy Screen**

Estimated Commission Amount can now be recorded on the Insurance Policy screen

### **Investment Account Changes**

Two additional fields and a new reminder has been added for bank account configurations

### **GST Reporting for New Zealand**

For databases configured for NZ, GST reporting amounts will include cents and all references to ATO will be displayed as IRD on the GST Report



### **Feature Details**

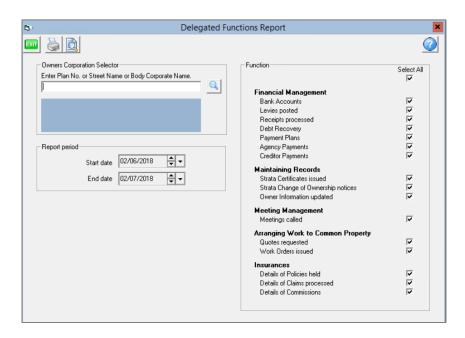
### **Delegated Functions Report**

The Delegated Functions Report allows you to generate a collection of reports from one screen.

The Delegated Functions Report can be renamed in the Configure > Terminology screen, and the new name will display after restarting STRATA Master.

To generate the report, select Delegated Functions Report from the Reports menu.

- 1. Select a plan.
- 2. Set a date range. The default date range will be the last month, but this can be changed to generate the report for a smaller or larger date range.
- All reports will be selected by default. Deselect the reports you do not want to include in the results.
- 4. Select the Preview or Print button.



# Pre-meeting Online Voting via the Owner and Committee Member Portals

Managing meetings in STRATA Master is now even easier with the added functionality of Pre-meeting Online Voting introduced in Version 10.

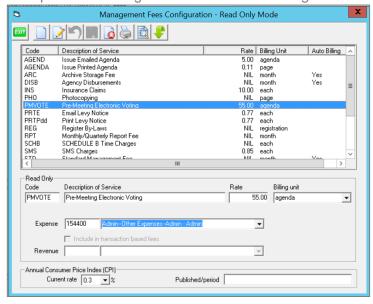
Owners can now vote online before the start of a General Meeting with the addition of a few simple steps to your existing process.

Using STRATA Master Version 10, you are now able to;

Configure Online Voting; including configuring plans and meetings for online voting



Set up a fee to charge clients for Online Voting



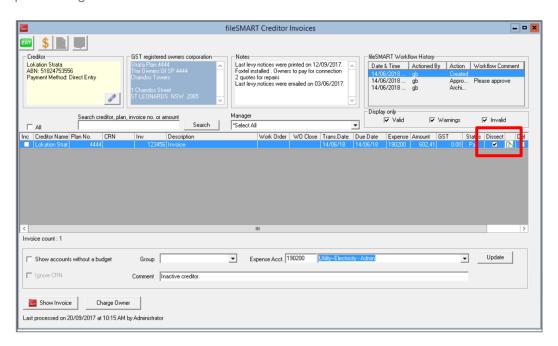
- Use the Meeting Wizard to send Voting Invitations to owners
- View Voting Reporting; including the voting register and audit trail reporting for meetings

See Online Voting with the Meeting Wizard in the Help File for more information on using this feature.

### Multiple Dissection Invoices using fileSMART Invoicing Workflow

STRATA Master Version 10 with fileSMART Version 7.8 introduces the ability to process an invoice with multiple dissections directly from the fileSMART Creditor Invoices screen in STRATA Master.

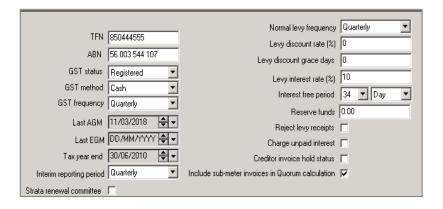
- Invoices can be flagged for multiple dissections from fileSMART Workflow or from the fileSMART Creditor Invoices screen in STRATA Master
- Dissections can be saved and edited from the fileSMART Creditor Invoices screen before processing



See Multiple Dissection Invoices in the Help File for more information on using this feature.

### Option to Include Submeter Invoices in the Quorum Calculation

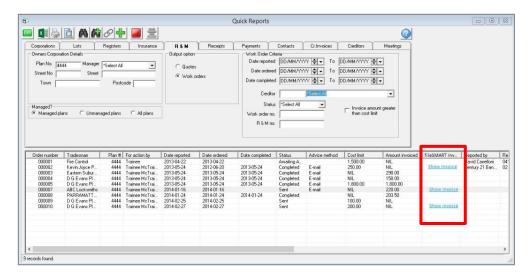
A new option is available to include outstanding sub-meter invoices in the Quorum calculation on the Meeting Attendance Register for all plans. This option is available on the Financial tab of the Corporation screen for an individual plan.



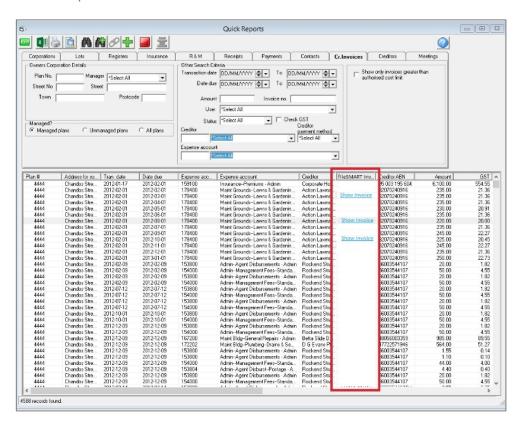
### View Linked Invoices in fileSMART Archive in STRATA Master

In various places in STRATA Master, to make viewing related invoices easier, there is now a link to the invoice in fileSMART.

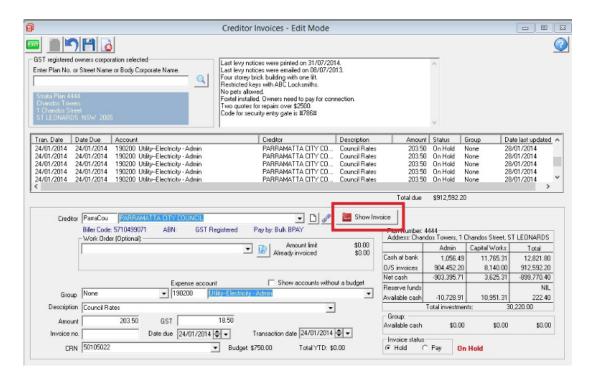
• fileSMART approved invoices linked to work orders will now a show a link to the invoice on the 'Quick Reports R & M tab' in STRATA Master.



• fileSMART approved invoices linked to work orders will now a show a link to the invoice on the 'Quick Reports Cr.Invoices tab' in STRATA Master.

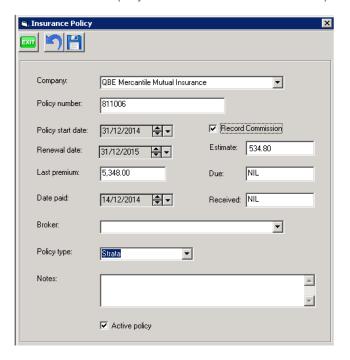


 Outstanding invoices processed in the fileSMART Creditor Invoices screen now display a button that links to the invoice in fileSMART.



### **Estimated Commissions on the Insurance Policy Screen**

Estimated Commission Amount can now be recorded on the Insurance Policy screen. The estimated amount also displays on the Insurance Quick report and on the new Delegated Functions Report.

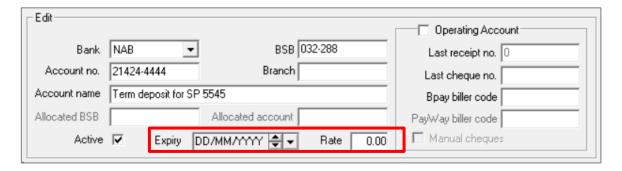


### **Investment Account Changes**

#### **Additional Entry Fields for Investment Accounts**

Two new fields have been added to Bank Account Configuration when Operating Account is unticked on an individual account:

- Expiry a date field listing the end date or maturity of the investment term.
- Rate the percentage rate of interest, which can be entered to 2 decimal places.



The new fields can be viewed:

- On the Corporation window, on the Bank Account tab
- Quick Reports, on the Corporation tab, selecting Show Bank Accounts
- On the Reminders screen if the Investment Account reminder has been activated

#### **Reminders - Investment Maturity**

A new reminder has been added:

Investment Account

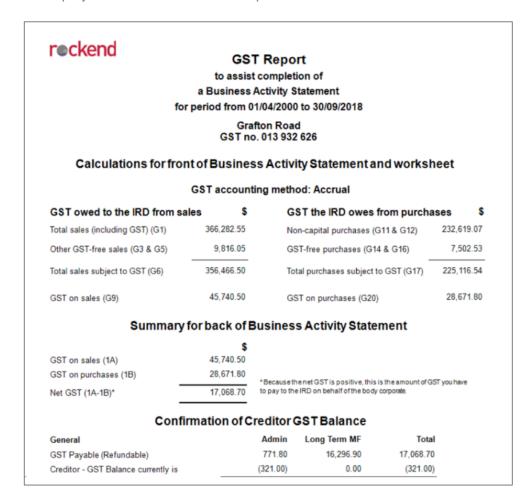
This reminder can be configured to display when an investment account is approaching its expiry (or maturity) date.

Where the expiry has been entered in Configure → Bank Accounts and linked to a plan in the Corporation window, Bank Account tab, a reminder can be triggered based on the number of days before the expiry date.

The reminder window will display the Bank, Account number, and rate of interest (if entered). When the Reminder is double-clicked, the user will be taken to the Corporation window, Bank Account tab.

### **GST** Reporting for New Zealand

For databases configured for NZ, GST reporting amounts will include cents and all references to ATO will be displayed as IRD on the GST Report.



### **Other Changes**

- A new feature has been added to provide the option to exclude duplicate contacts when using the Mail Merge Wizard.
- Changes to the Owner & Committee Member Portals to remove instances of 'Executive Committee'
- The Proposed Levy Report has been updated so that references to 'Capital Works' have been changed to 'Sinking Fund' for NSW plans based Association types of; Neighbourhood Association, Home Unit Company, Precinct Association, Community Association
- SMTP encryption methods have been added to extend security when sending bulk SMS messages.
- Email address validation now allows email addresses containing symbols (for example +, &) to be saved.

# What we fixed

Defect Details	
Quick Reports	An error when attempting to show linked bank account from Quick Reports has been resolved.  An issue where a non-creditor payee details could not be searched for in the Quick Reports > Payments screen has been fixed
Search in Mail Merge	An error when searching for Owner/Lots in mail merge has been resolved
Invoices where description was changed	An error occurring when paying an invoice where the description was changed in the 'Search/Edit Transactions' screen has been resolved
fileSMART Creditor Invoices	An error when deselecting a row by clicking on the grid header on the 'fileSMART Creditor Invoices' screen has been resolved
Screen	An issue in the fileSMART Creditor Invoices screen highlighting the wrong invoice as the duplicate when duplicate detection is enabled in Agency Configuration has been resolved
Generic BPAY Levy Notice Slip	An error with a BSB label appearing on the a 'Generic BPAY Levy Notice slip' has been resolved
Diary Report	An error when running the Diary Report for a large date range has been resolved

