



STRATA MASTER

Release Notes

Strata Owner and Committee Portal

Date: July 2019

Strata Owner and Committee Portal

The new Strata Owner and Committee Portal provides your customers with a refreshed look and feel, as well as increased functionality to assist with improving communication and service delivery.

Prerequisites

To start using the new portals, you will need to:

Ensure you have upgraded to Version 11.0.2 of Strata Master or higher.

1. To check which version you are running, click Help > About Strata Master
Your version number is displayed on the next screen.
2. If you need to upgrade, follow the upgrade instructions on the Knowledgebase which can be found [here](#)

When you are using Version 11.0.2 or higher you will need to download the new Strata Communicator Configuration Tool.

Strata Communicator must be installed on the Strata Master Server – you will require full access to your server

1. You must log into Strata Master with the highest security level (Configure > Users > Access Rights > Communicator)
2. Navigate to Configure > Communicator Configuration
3. This will automatically uninstall the old tool and reinstall the new version. If you upgraded from an older version, you may be prompted to manually uninstall Strata Communicator from your programs before downloading the new version.

The new Communicator Configuration Tool has been redesigned and facilitates the additional features made available on the portal. As a first step, you will need to upload your new resized header and/or footer to replace the previous banners.

More detailed information on the Communicator Configuration Tool can be found here <http://kb.rockend.com/help/owner-and-committee-portals-with-strata-communicator>

Homepage

A new homepage is now available that surfaces key information to your customers making it even easier for them to get the information they need.

The homepage displays the following information:

- Property Details
- Property Image
- Financial Details
- Bank Balance (this data is pulled from the general tab on the building card in Strata Master)
- Scheduled Meetings
- Maintenance Summary

Please note the information displayed is dependent on your selections in the Communicator Configuration Tool & Web Access configuration.

Owners Corporation Page

The Owners Corporation page has refreshed design and there is no change to functionality.

The Owners Corporation page displays the following information:

- Property Details
- Property Photo
- Manager Details
- Manager's Photo
- Management Details
- Entitlements

Please note the information displayed on this page is dependent on your selections in the Communicator Configuration Tool.

You can add a photo of your Manager in Strata Master by navigating to Configure > Users.

The photo of the property can be added to the General tab on the building card in Strata Master.

Portfolio Page

The Portfolio page has a refreshed design and there are two additional fields available in the Financial Details section: Arrears and Interest Due.

This will make it easier for owners to view their financial information without the need to download their Current Owner Account.

The Arrears and Interest Due are also displayed in the Financial Details section on the Homepage.

Please note the information displayed on this page is dependent on your selections in the Communicator Configuration Tool.

Reports Page

The Reports page has a refreshed design and there is no change to functionality.

The 'View' button has been replaced with a download icon. When hovering over the icon a tooltip 'Click here to download report' is displayed.

In Version 11 of Strata Master several different report parameters were added to the portal, along with Financial Group reports. See the release notes [here](#).

Meetings Page

The Meetings page has a refreshed design, scheduled and past meetings now display on separate tabs making it easier for owners to view upcoming meetings.

Please note the information displayed on this page is dependent on your selection in the Communicator Configuration Tool.

Online Voting

The online voting workflow has been improved to make online voting even easier for owners.

- When an owner first navigates to the portal they will see the 'Vote' button displayed next to a scheduled meeting that is open for online voting.
- When an owner has previously submitted their online votes, the button name changes to 'Edit Votes' and there is a 'Vote received' status. This will help owners to see that their votes have been received and they have the option to change their votes if they wish.
- When online voting has closed the button displayed changes to 'Voting Closed'

Motions will now display one per page and you will automatically transition to the next motion when a selection is made.

The full motion text from the Agenda Wizard is now displayed on the portal.

A new option has been added to the Communicator Configuration Tool which allows you to change the default motion responses of Yes, No, Abstain.

Please note the information displayed on this page is dependent on your Communicator Configuration Tool.

Online Voting was released in Version 10 of Strata Master, see the release notes [here](#).

Documents Page (File Smart users only)

The Documents page has a refreshed design and some additional functionality to make it faster for owners to search for documents.

A search bar has been added to the page which will allow owners to search based on document type or description to allow them to quickly get their hands on the document they require.

For owners that own lots in multiple buildings, a filter is now available allowing them to view documents on a per building basis. Please note the information displayed on this page is dependent on your Communicator Configuration Tool.

Please note the information displayed on this page is dependent on your selections in the Communicator Configuration Tool.

Invoices Page (File Smart users only)

A new Invoices page has been added to the portal. When this page is activated in your Communicator Configuration Tool, all documents with the Document Type of Invoices will be removed from the Documents page and displayed on the Invoices page.

The following columns are available on the page

- Document Type
- Creditor
- Description
- Date

As with the documents page there is a search bar which allows owners to search based on the document type, creditor and description.

The addition of the creditor's details will make it faster for owners to locate a specific invoice.

Please note the creditor's details are pulled from the creditor's name field in Strata Master.

The creditor's details will also now be displayed against Quotes and Work Orders archived in the Payments/Maintenance folder when the Invoices page is activated.

As with the documents page for owners that own in multiple buildings, there is a filter available allowing them to view invoices on a per building basis.

Please note the information displayed on this page is dependent on your selections in the Communicator Configuration Tool.

Maintenance Page

The Maintenance page has a refreshed design and a few changes have been made to make navigating the content more user friendly.

Work Orders and Quotes now appear on separate tabs, making it easier for the owners to navigate.

Each tab is also broken down into two sections, Open and Closed.

Please note the information displayed is dependent on your selections in the Communicator Configuration Tool.