
Release Notes – Version 5.6.27

StrataMax has been dedicated to meeting the needs of Strata Managers for over 20 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



What's New.....	3
1. Compliance Monitor – New Export Inactive Contractor Setting.....	3
1.1 <i>Configure inactive contractors to be excluded from export.....</i>	<i>3</i>
1.2 <i>Review inactive contractors.....</i>	<i>3</i>
2. Management Fee Setup – New Cloning option.....	4
2.1 <i>Cloning an existing Management Fee.....</i>	<i>4</i>
3. Roll Master Edit – Agent / Mortgagee Contact Management.....	6
3.1 <i>Roll Master Edit – Contact Management Overview.....</i>	<i>6</i>
3.2 <i>Create a New Contact.....</i>	<i>8</i>
3.3 <i>View or Edit an Agent or Mortgagee Contact.....</i>	<i>9</i>
3.4 <i>Add an Agent or Mortgagee as a Notice recipient in the Roll.....</i>	<i>9</i>
3.5 <i>Add a new Agent / Mortgagee to the Roll.....</i>	<i>10</i>
What's Better.....	11

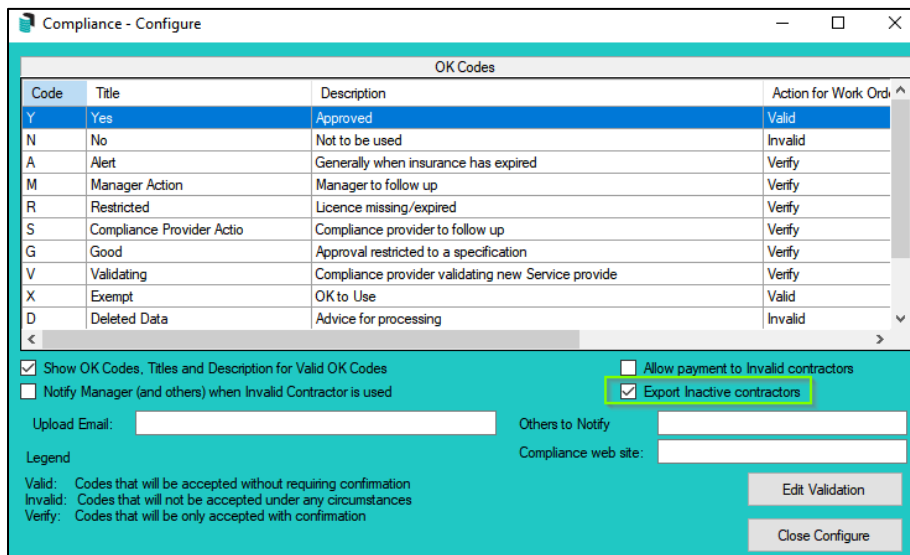
What’s New

1. Compliance Monitor – New Export Inactive Contractor Setting

The Compliance module now has a new configuration setting which provides the option to include or exclude inactive contractors. When configured, the exported file will no longer include contractors set as inactive in Creditor Maintenance. This option will apply to ARM and Trades Monitor Compliance Provider export files.

1.1 Configure inactive contractors to be excluded from export

To configure the export, navigate to Compliance / File / Configure. Tick the “Export Inactive contractors” setting to include or untick to exclude.



Please note: The setting will be configured to include inactive contractors by default on update. Please review the setting if you want them to be excluded.

1.2 Review inactive contractors

Inactive contractors are determined by the value set in Prompt/Preferred/Banned field (Field 28) in Creditor Maintenance.

	Name	Data
26	Email Address	
27	Email Address - Work Orders	
28	Prompt/Preferred/Banned	I
29	Comments (1)	
30	Workers Comp Insurer	

Please note: If you have 'None' or 'Self-Managed' Compliance configured, you will not be able to utilise this feature.

2. Management Fee Setup – New Cloning option

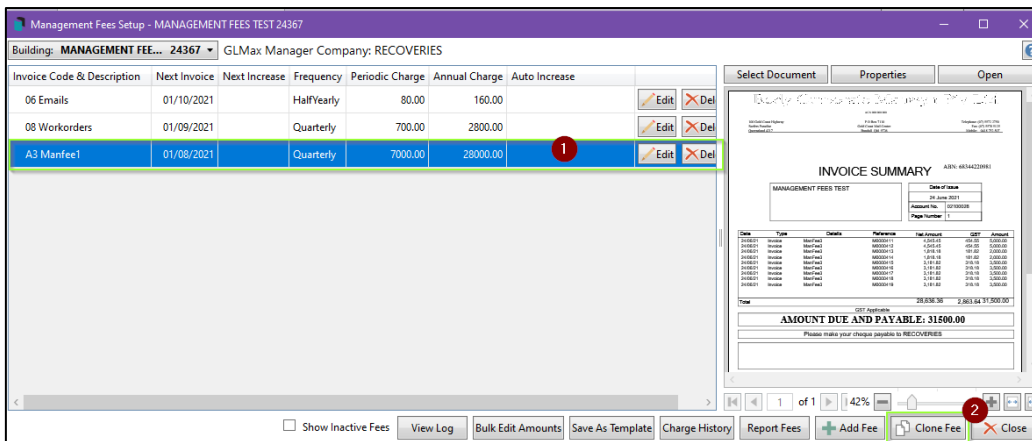
The Management Fee Setup module now has a new 'Clone Fee' option'. When selected, the system will clone the following information from the selected Management Fee:

- *Frequency*
- *Start Date*
- *Next Charge Date*
- *Termination date (if there is one in original setup being selected)*

2.1 Cloning an existing Management Fee

To clone an existing Management Fee, follow the below steps:

1. Navigate to 'Management Fee setup'
2. Highlight the Fee you wish to clone



The highlighted Management Fee above holds the below information for this example:

The screenshot shows the 'Edit Management Fee' window for 'MANAGEMENT FEES TEST - 24367'. The fields are populated with the following values:

- Invoice Code: A3 Manfee1
- Building Expense A/c: 15005 MANAGEMENT FEES
- Frequency: Quarterly
- Amount: 7000.00
- Per Period: Per Period
- Charge per lot (x 0):
- Min Periodic Amount: [Empty]
- Periodic Charge: 7000.00
- Annual Charge: 28000.00
- Effective Dates: Start 01/05/2021, Termination 01/03/2023
- Next Charge: 01/08/2021 (7 more charges until the end date)
- Auto Increase: No Auto Increase
- Active:
- Next Increase: [Empty]

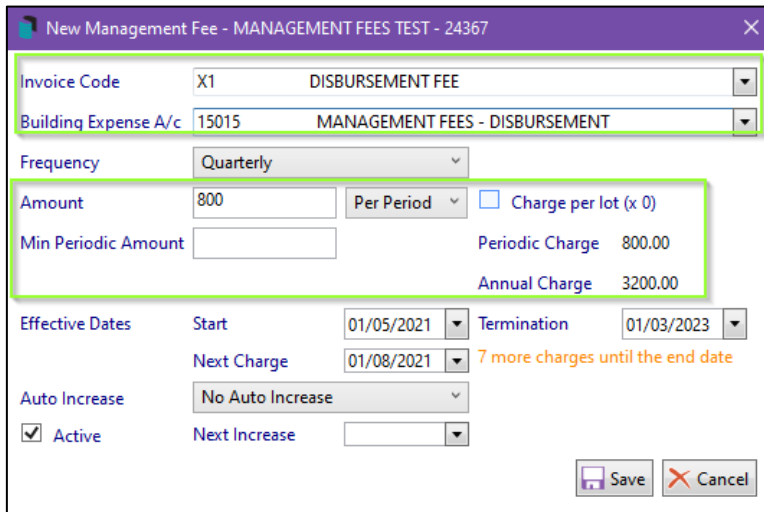
3. Click on 'Clone Fee'
4. The 'Edit Management Fee' window will appear. Frequency, Start, Next Charge Dates and Termination have all been cloned from the selected existing fee, see example below:

The screenshot shows the 'New Management Fee' window for 'MANAGEMENT FEES TEST - 24367'. The fields are populated with the following values:

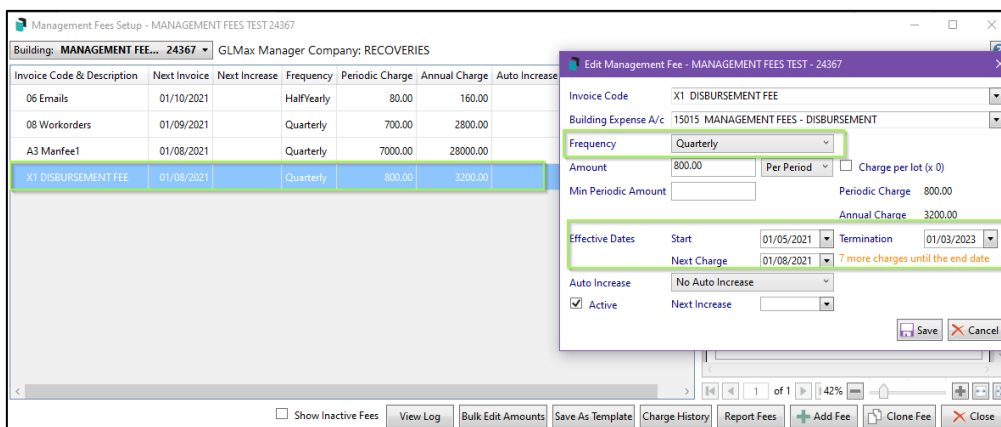
- Invoice Code: 00 Sundry
- Building Expense A/c: 15015 MANAGEMENT FEES - DISBURSEMENT
- Frequency: Quarterly
- Amount: 0
- Per Period: Per Period
- Charge per lot (x 0):
- Min Periodic Amount: [Empty]
- Periodic Charge: 0.00
- Annual Charge: 0.00
- Effective Dates: Start 01/05/2021, Termination 01/03/2023
- Next Charge: 01/08/2021 (7 more charges until the end date)
- Auto Increase: No Auto Increase
- Active:
- Next Increase: [Empty]

A validation error message 'Amount is required' is displayed in a yellow box at the bottom left of the window.

5. Change all the other required fields shown below for the new fee



6. Click 'Save'
7. The new fee will be added to the list of available Management Fees



Please Note – There must be a Management Fee highlighted before the 'Clone Fee' option is available.

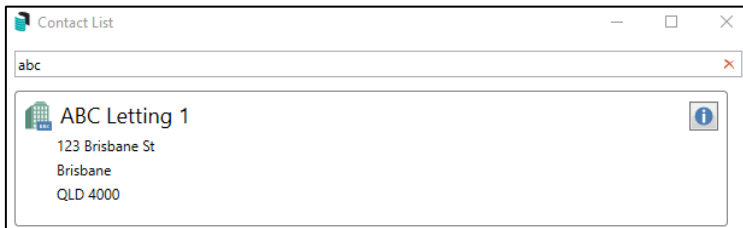
3. Roll Master Edit – Agent / Mortgagee Contact Management

3.1 Roll Master Edit – Contact Management Overview

Enhancements have been made to the Roll Master Edit module which will now utilise a new user interface to add, view and edit Agent and Mortgagee contacts. To review the new screens, search or open 'Roll Master Edit' and click 'Edit'. Select 'Agent', 'Mortgagee' or 'All' to open a list of relevant contacts.

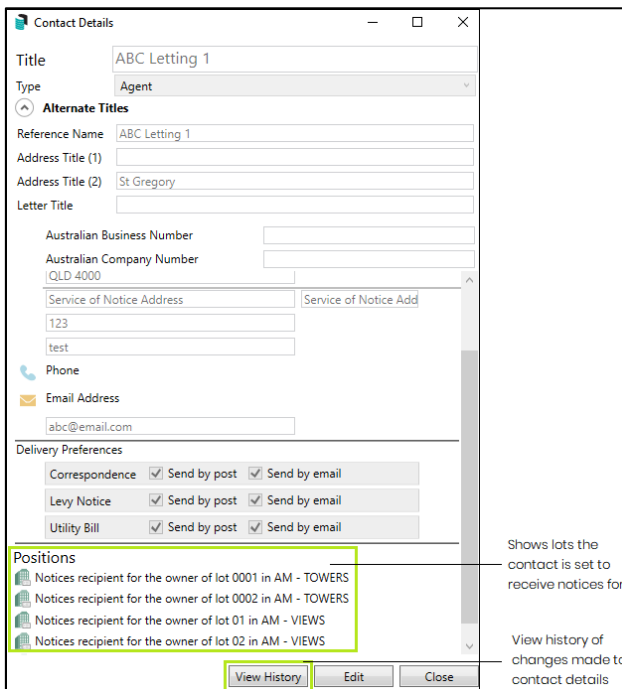
New features include:

- A search filter to make contact selection easier. Search by name, email address or phone number.



Note: Use the ' X ' to clear the filter.


- Enhanced validation to reduce duplicated entries – significant changes to the title of the contact will be restricted to prevent overwrites and duplications. Use 'Add Contact' to create a new contact with a different name.
- A window that displays all properties using the contact for notices and or correspondence.
- An option to view the history of changes to the contact details.
- A 'Contact Card' type display that shows all details in one window






3.2 Create a New Contact

To create a new contact please use the following steps:

1. Search or select 'Roll Master Edit'
2. Select 'Agent', 'Mortgagee' Or 'All'
3. Click 'Create Contact'
4. Enter the full name of the contact
5. Select Agent or Mortgagee in the Type drop-down list

6. Click or tab to the Reference Name field and add the Reference Name
7. Click or tab through the Address and Letter Title fields and enter the required details
8. Add an ABN or ACN if required
9. Click the  icon to add a Postal Address, Phone Number and Email Address

Please Note: Additional Phone Numbers and Email Addresses can be added by clicking the  icon. To remove any of the entries, click the  icon beside them.

To assist with avoiding creating duplicate contacts if an email address is entered that is already used in another Agent contact card the  icon will appear next to the email address field.


10. Click 'Save'

A contact card will be created for the newly added Agent or Mortgagee.

3.3 View or Edit an Agent or Mortgagee Contact

1. Search or select 'Roll Master Edit'
2. Select 'Agent', 'Mortgagee' Or 'All'
3. Click in the 'Search' field and start typing the name of the contact you would like to edit.



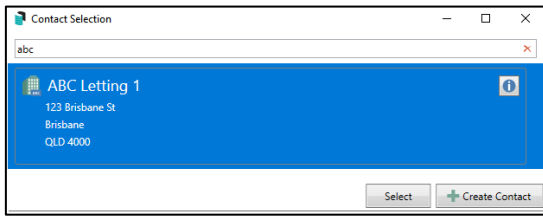
4. Click the  icon to View or Edit the details – the details for the contact will open in 'View Only' Mode
5. Click 'Edit' to update the details for the contact – the record will be enabled for editing
6. Click 'Save'

Please Note: If more than ten percent of the title is altered, you will be prompted to create a new contact.

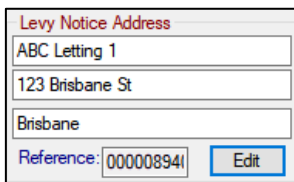
Your changes will be filtered to the appropriate records.

3.4 Add an Agent or Mortgagee as a Notice recipient in the Roll

1. Navigate to the Roll
2. Select the account to update
3. Click 'New'
4. Click 'Change of Ownership' if adding a new owner or 'Change of Details' if updating the Agent for the current owner
5. Click 'Insert' under Levy or Service of Notice Address
6. Select 'Agent' or 'Mortgagee'
7. Start typing the name of the contact to insert or click 'Create Contact' to add a new one

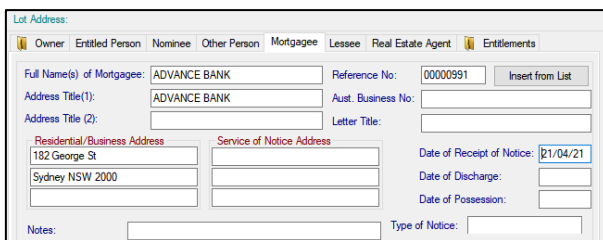


8. Highlight the contact
9. Click 'Select' - the contact will be added to the selected Notice Address field in the Roll



3.5 Add a new Agent / Mortgagee to the Roll

1. Navigate to the Roll
2. Select the account to update
3. Select the 'Agent' or 'Mortgagee' tab
4. Click 'New'
5. Select 'New Mortgagee / Agent' or 'Change of Details'
6. Click 'Insert from List'
7. Start typing the name of the contact to insert or click 'Create Contact' to add a new one
8. Highlight the contact
9. Click 'Select' - the contact will be added to the Roll



10. Add 'Date of Receipt of Notice' and any other required details and click 'Save'

Please Note: Any changes made to the contact in this screen will be filtered to the global contact and will update all instances of the record.

What's Better

- Minor issue has been addressed when using the DocMax document selection window
- A range of storage optimisations have been implemented across the product to reduce database usage.
- Enhancements have been made to EBMax to speed up the process
- Minor issue has been addressed in EBMax – MBL Import – occurs if the same file is processed twice
- Meeting Hub – Minor issues have been addressed in Relation to Document Generation when converting a meeting notice or meeting minutes to PDF via the Document Distribution screen
- Help link has been added to BMC (Building Management Committee)
- Legal Action – Agent Summary Report to Excel will now report the Original Arrears amounts
- Edit Invoice Codes report to Excel is now available
- Receipt Entry/Transaction History search has been enhanced with the new user interface and search functions to improve the user experience. The new interface allows users to apply more refined selections making searches quicker and results easier to review.