

Release Notes – Version 5.6.31

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. BingMail API - Printing to EasyPost Mailroom.....3

 1.1 *Overview.....3*

 1.2 *BCMax BingMail Web API Setup.....3*

 1.3 *BingMail API Connection Failure.....5*

2. Replicating User Settings.....6

3. Manual Cheque Book references.....7

 3.1 *Entering a cheque book reference.....7*

 3.2 *Processing banking when invoice already exists.....9*

 3.3 *Processing a manual cheque using 'Create Payment'.....9*

What's Better 10

What's New

1. BingMail API – Printing to EasyPost Mailroom

1.1 Overview

BCMax can now be configured to utilise the new BingMail Web API when printing from any area in BCMax where notices or documents need to be printed in bulk, rather than using the EasyPost Mailroom software. By using this feature, BCMax will group and send documents or reports printed for each building and quickly upload them to the BingMail portal for review.

The BingMail portal will automatically detect the addresses and collate all notices intended for the same recipient into a single envelope, reducing postage costs. You can find further information regarding the BingMail Portal on their website (<http://help.bingmail.com.au/customer-portal>). For additional information, please contact the Bing Customer Service department.

In order to configure BCMax to use the BingMail Web API, you will first need the following BingMail credentials:

Account ID

Portal Account Username

Portal Account Password

If you do not have these credentials, please contact the Bing Customer Service department via the below details and inform them you are integrating BCMax with the BingMail Web API.

BingMail Customer Service Department

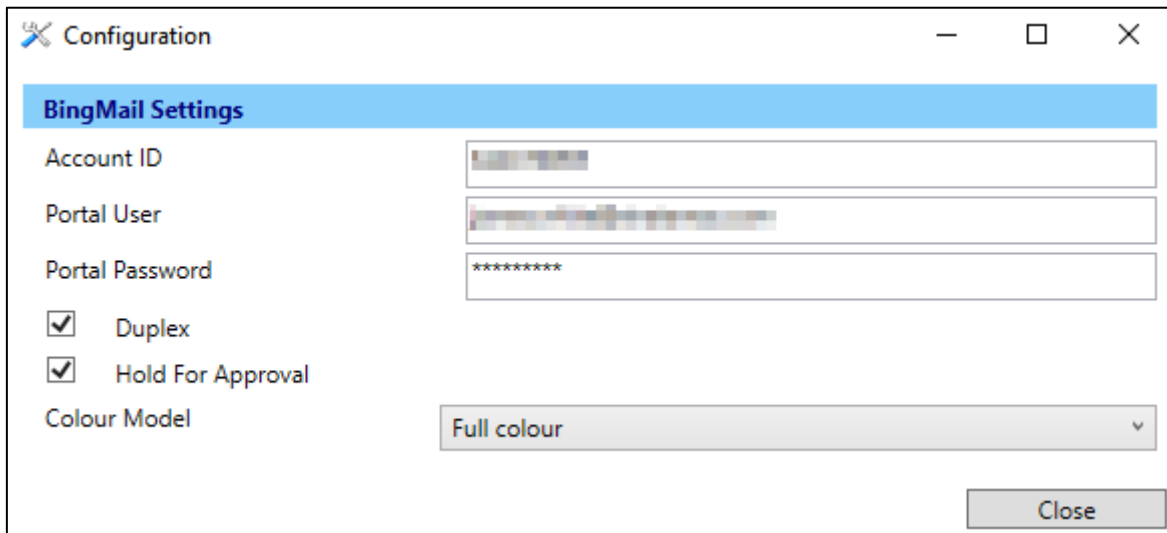
Email Address: customerservice@bingmail.com.au

Phone Number: 1300 309 800

1.2 BCMax BingMail Web API Setup

Once you have obtained BingMail credentials, follow the below steps to configure:

1. Navigate to the “Levy Notice/Reports” module
2. Click the “...” button next to the Printer Selection
3. Click the “Tools” menu and select “BingMail Settings”
4. Enter your BingMail Account ID, Portal Username and Portal Password into the applicable fields



The screenshot shows a window titled "Configuration" with a blue header bar labeled "BingMail Settings". The window contains the following fields and controls:

- Account ID: A text input field with a blurred value.
- Portal User: A text input field with a blurred value.
- Portal Password: A text input field with masked characters (*****).
- Duplex: A checked checkbox.
- Hold For Approval: A checked checkbox.
- Colour Model: A dropdown menu currently set to "Full colour".
- Close: A button located at the bottom right of the window.

5. Click the “Close” button

The Bing API setup is also available from the Tools menu in any area where printing from BCMax is an option.

Please Note: These credentials are stored ‘globally’ in BCMax for every user. Once this area has been configured by one user, there is no need to repeat these steps. If you have previously configured BingMail for Levy Notices, you will not need to re-enter the details in other areas, including GLMax.

Once configuration is complete whenever the “Mailroom” printer is selected for a print run, BCMax will use the BingMail API to upload the documents. These can then be reviewed on the BingMail portal, reusing your previously input BingMail Portal Username and Password.

1.3 BingMail API Connection Failure

If for some reason, the API is not able to accept the document uploads (i.e. Internet Dropout, or a mistake in the username and password) BCMax will provide the below message along with an option to “Cancel upload and print locally”. This will redirect your current print run to the EasyPost Mailroom software locally installed on your computer, so that you may issue to BingMail in the standard method.

Please Note: If there is no Account ID present in the BingMail configuration window, BCMax will continue to utilise the EasyPost Mailroom software in the standard method.

Additional BingMail API Configuration Options

Within the BCMax BingMail Configuration screen, there are several configuration settings;

- Duplex – This setting will tell the BingMail Portal to print multiple page documents on both sides of the paper. This can help reduce printing costs.
- Hold for Approval – This setting will cause any printed documents to remain on the BingMail portal with the status “On hold”. This allows for an internal review, or approval process prior to issuing Levy Notices to lot owners. If this setting is switched off, any uploaded documents will be included in the next print run at BingMail.
- Colour Model – This setting will determine how much colour you want to print. The options are as follows:
 - Mono (Black & White)
 - Full Colour
 - First Page Colour
 - First Page Colour with Colour Attachments
 - Mono with Colour Attachments
 - Colour will Mono Attachments

Please Note: Meeting Hub and DocMax will use BCMax configuration if Mailroom printer is selected.

2. Replicating User Settings

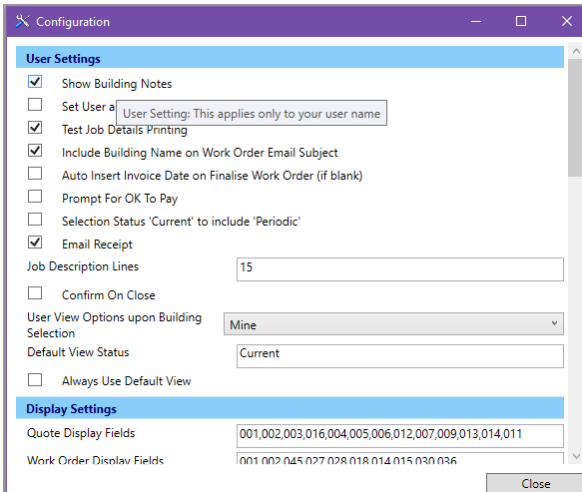
We have added the ability to replicate a user’s settings to a new or existing user.

This option ‘User Settings’ will allow the management of user settings when taking on new staff or to ensure existing staff have the same configuration setup across departments, with exception of the email/communication section.

All configuration settings that show ‘User Setting: This applies only to your user name’ in the following modules will be replicated:

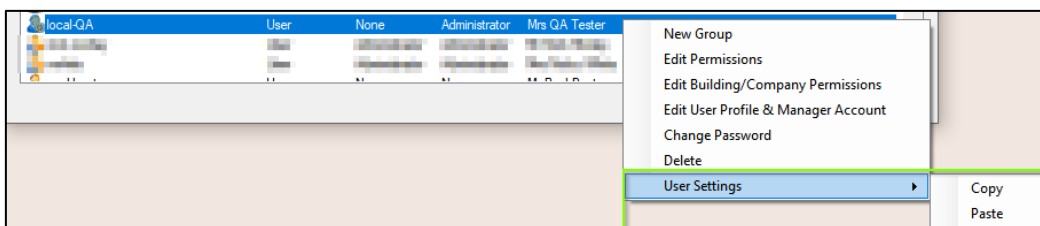
- BCMax
- GLMax
- TaskMax
- TRMax
- DocMax

Example of TaskMax configuration:



To access this new feature via ‘Security’, please follow the steps below:

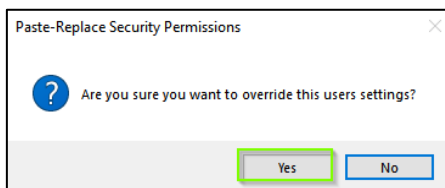
1. Navigate to Security Setup
2. Right click the user you would like to replicate the user setting for
3. Select ‘User Settings’
4. Click ‘Copy’



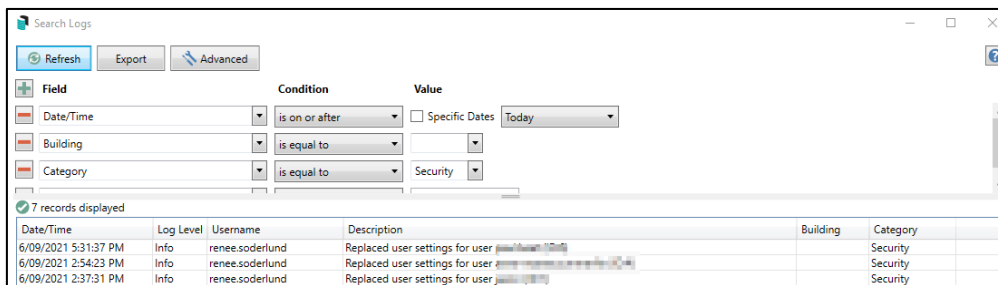
- Right click the user you would like to copy the settings to.

Please Note: Multiple users can be selected by holding the shift key and clicking on each user before right clicking.

- Select 'User Settings'
- Click 'Paste'
- Confirm the change by clicking 'Yes' when prompted



- The settings will be copied to the selected User.
- A log is available to show any user that has had settings replaced



Please Note: This new feature will allow users to replicate user settings to other users across drives.

3. Manual Cheque Book references

A Cheque Book reference option has been added to the Payment Entry module. This new enhancement will allow users to record a manual cheque book number against a payment.

3.1 Entering a cheque book reference

To enter a manual cheque against a creditor using Payment Entry, follow the below steps:

- Navigate to 'Payment Entry'

2. Select the required creditor
3. Select the new option 'Cheque Book'
4. Enter the manual cheque book 'reference' in the field provided
5. Select the invoice and amount to pay
6. Click 'Save'

OCEANVIEW RESORT 4424 - Payment Entry

Account: 08200006 CLEAN AND SHINE Date: 06/09/2021 Bank Balance: -7,428.00

Name: Clean and Shine Amount: 50.00

ABN: 71 977 144 578

Address: 12 Ocean Way SOUTHPORT QLD 4124

Payment Method: Cheque book Reference: 000026

Reference	Date	Description	Invoice No.	BPAY CRN	On Hold	Invoice Amount	Unpaid Amount	Amount to Pay
D0000006	01/09/2021	Cleaning August	9033			900.00	900.00	50.00

7. Payment will be saved
8. Manual cheque book payment will appear in 'Payment Management' with the manual cheque book reference reporting in the details section.

Payments Management

Building: OCEANVIEW RESORT 4424

Creditor: 08200006 CLEAN AND SHINE

Date Range: 01/08/2021 to 30/09/2021

Building	Name	Date	Creditor	Name	Amount	Reference	Status	EFT
4424	OCEANVIEW RESORT	06/09/2021	08200006	CLEAN AND SHINE	50.00	C0000009		
4424	OCEANVIEW RESORT	04/09/2021	08200006	CLEAN AND SHINE	300.00	C0000005		
4424	OCEANVIEW RESORT	03/09/2021	08200007	LAWN AND MORE CHANGE	650.00	C0000008		
4424	OCEANVIEW RESORT	02/09/2021	08200007	LAWN AND MORE CHANGE	200.00	C0000007		
4424	OCEANVIEW RESORT	02/09/2021	08200007	LAWN AND MORE CHANGE	50.00	F0000004		
4424	OCEANVIEW RESORT	02/09/2021	08200003	AUSTRALIAN TAX OFFICE	748.00	C0000006		
4424	OCEANVIEW RESORT	02/09/2021	08200007	LAWN AND MORE CHANGE	880.00	F0000003		
4424	OCEANVIEW RESORT	02/09/2021	08200004	ATO - INCOME TAX	3,900.00	F0000002		
4424	OCEANVIEW RESORT	02/09/2021	08200006	CLEAN AND SHINE	150.00	C0000004		
4424	OCEANVIEW RESORT	02/09/2021	08200007	LAWN AND MORE CHANGE	80.00	C0000003		
4424	OCEANVIEW RESORT	02/09/2021	08200007	LAWN AND MORE CHANGE	20.00	C0000002		
4424	OCEANVIEW RESORT	02/09/2021	08200006	CLEAN AND SHINE	100.00	C0000001		
4424	OCEANVIEW RESORT	01/09/2021	08200006	CLEAN AND SHINE	200.00	F0000001		

Count: 13

\$50.00 06/09/2021

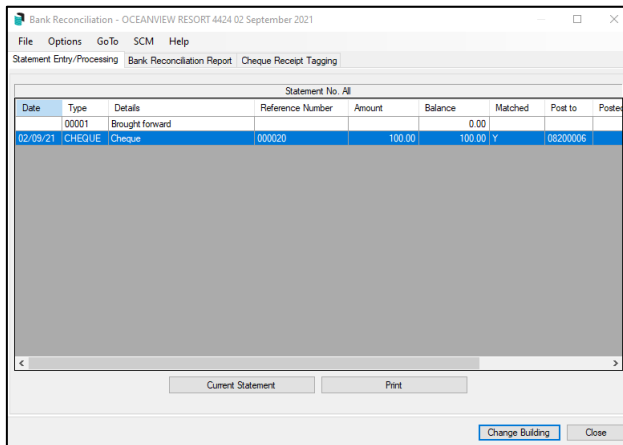
08200006 - CLEAN AND SHINE

C0000009 - Cheque Number 000026

Invoice Number	Date	Amount	Paid Amount	Description	Expense Account
9033	01/09/2021	900.00	50.00	Cleaning August	13105 CLEANING
			50.00		

3.2 Processing banking when invoice already exists

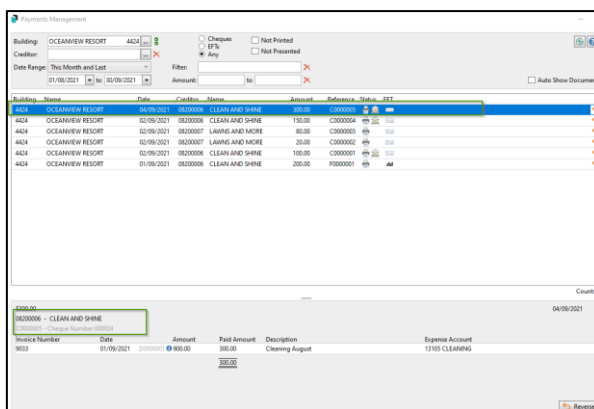
If an Invoice has been entered and Payment Entry has been used to record the manual cheque, when the cheque is presented through the banking process the manual cheque will automatically match the cheque bank statement entries to the unrepresented cheques.



3.3 Processing a manual cheque using 'Create Payment'

'Create Payment' can be used to allocate a manual cheque payment including reference to a creditor where there is no previous payment recorded. Once 'Create Payment' entry is saved the bank statement can be auto reprocessed and finalised.

The presented Cheque will appear in 'Payment Management' showing the manual cheque book reference.



Important Note: 'Cheque Entry' or 'Set Next Cheque Number' are now obsolete and have been removed from the program due to Payment Entry replacement.

What's Better

- In Utility buildings, the Global Agent Utility contact preference will be honoured if set as the Levy Notice recipient in the Roll and the Lot is linked to a Utility account.
- Tag option in Tag Paid Invoice will now require a StrataMax Support password as it is no longer required for day-to-day processes and prevents Bank Reconciliation and Payment Entry from working as designed if used incorrectly.
- Minor issues have been addressed around emailing when using the 'Multiple Buildings' option in Merge Letter.
- Issues have been resolved when running a Ledger Card, report month: July. The report will now only return transactions for July.
- Global and Local template options have been removed from the Arrears Template Selection screen.
- Further enhancements have been made to DocMax searches for SQL Server to enhance performance.
- Issues have been resolved when running an Auditor's Report.
- 'Cheque Entry' is now obsolete and will no longer be needed to handle Cheque Book cheques. This option has been removed and will no longer be available via Payments/Cheque Entry.
- 'Set Next Cheque Number' has now been removed as no longer required for manual cheque book items.
- Minor issues have been resolved when running the automatic month end rollover process and creating the status report data around receipts.