

Release Notes – Version 5.6.32

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



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What's New

1. Printer setup for Bing API

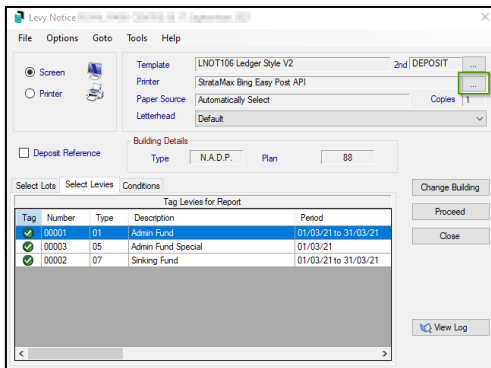
Enhancements have been made to the printer setup, a new item 'StrataMax Bing Easy Post API' will now be available if BING API has been configured. This will allow either API or Mailroom to be selected.

Please note: This print option is only to indicate to BCMax to use the API, clients using 'Mailroom' for levies should change their printer option to use the new 'StrataMax Bing Easy Post API' instead.

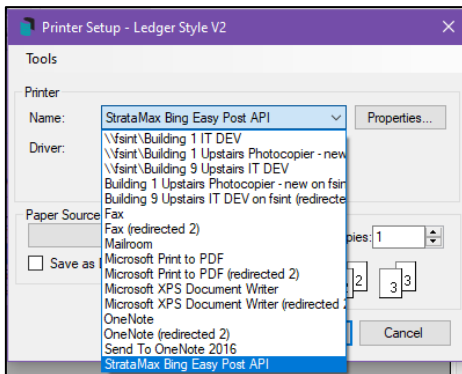
1.1 Setting StrataMax Bing Easy Post API Printer

To set the StrataMax Bing Easy Post API printer, follow the below steps:

1. Navigate to 'Levy/Notice Reports' for example
2. Select Printer Setting dialog box



3. Select 'StrataMax Bing Easy Post API'

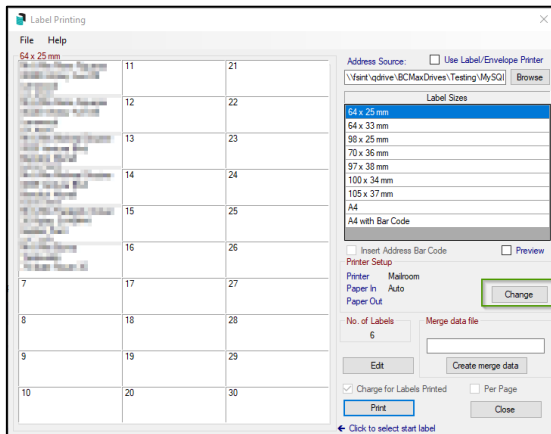


4. Click 'Proceed'
5. Levy Notices will be sent to Bing portal via the API.

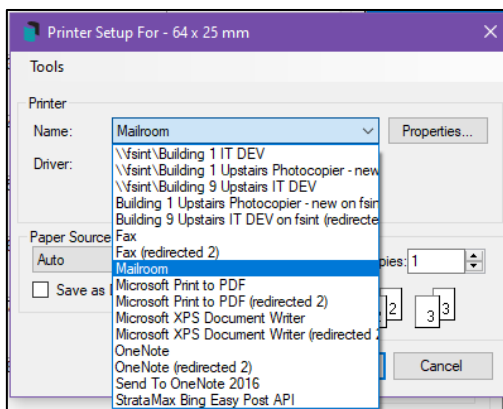
1.2 Setting 'Mailroom' Printer

To set the Mailroom printer, follow the below steps:

1. Navigate to 'Label Printing (Debtors)' for example
2. Select the Owners in the list
3. Click on 'Proceed'
4. Select the 'Change' button



5. Select the 'Name' dropdown
6. Select 'Mailroom'



7. Click 'Print'
8. 'EasyPost Mailroom' will open instead of the Bing API

2. Office Bearers – Setup and Contact Management

2.1 Office Bearers – Setup and Contact Management overview

The Office Bearers module has been refreshed to include an enhanced user interface which incorporates Office Bearers into a new Contact Management system.

2.2 New features

The Office Bearer display screen has the following new features:

- Invoice Hub Approver indicator column
- Resigned Officer quick toggle option
- Quick link option to view officer contact card details
- Quick link option to edit Officer Bearer details
- Set the Last AGM Appointment Date (Updates Last AGM Date field in Info Update)

Office	Contact	Appointed	Resigned	Owner of Lot	Nominated By	Approver
Body Corp. Manager	NSW					
Chairperson	Hub Tester	15/07/2021				
Secretary	Brandy Bucket	13/08/2021		02100002		
Secretary	Owner	27/07/2021	10/08/2021	02100005	02100002	
Treasurer	Owner	29/07/2021	10/08/2021	02100005		
Committee Member	Nominee Tester	13/08/2021			02100005	
Committee Member	Owner	16/07/2021				
Committee Member	Owner	25/01/2021	27/07/2021			
Director	Andy Apple	10/05/2021		02100001		

At the bottom of the screen, there is a 'Show Resigned Officer quick toggle' with a checked box and a 'Show Resigned' button. Other buttons include 'Appointments', 'Configure...', 'Add Officer', 'Save', and 'Close'.

The Office Bearer Details and setup screen has the following new features:

- New menu to select Office Bearer contact from the Roll, an existing global contact or create a new contact
- One display window to show Office Bearer details
- Quick link option to view officer contact card details

Office Bearer Details

Select From Roll
Select Contact
Create Contact

Andy Apple
Apple Street
Appleville QLD 4220
andy@apples.com.au
0412 345 678

Office: Director

Appointed: 10/08/2021

Resigned:

Owner of Lot: 02100001 ANDY APPLE

Nominated by Lot:

Creditor Code:

Comments:

Registration Details:

Payment Conditions:

Status Reports: Use Report Default

OK

2.3 Add an Office Bearer

Use one of the menu options in the Add Officer screen to add an Office Bearer from the Roll, an existing contact or by creating a new contact. In the Office Bearer screen click 'Add Officer'. The following menu options will be presented.

- Select from Roll
- Select Contact
- Create Contact

Office Bearer Details

Select From Roll
Select Contact
Create Contact

No contact selected

Office: Secretary

Appointed: 30/07/2021

Resigned:

Owner of Lot:

Nominated by Lot:

Creditor Code:

Comments:

Registration Details:

Send Status Reports

Contact details are required

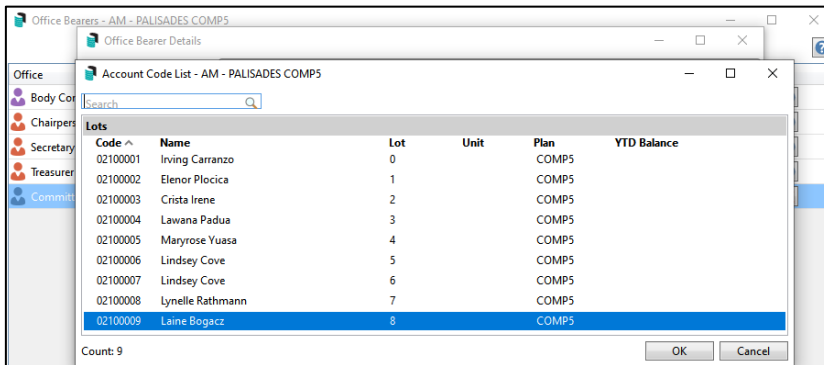
OK

Select from Roll

To add an owner from the Roll as an Office Bearer use the following instructions:

1. In the Office Bearers screen click 'Add Officer'
2. Click 'Select from Roll' – The Roll Account Code List will be presented

3. Click the relevant owner account
4. Click 'OK'

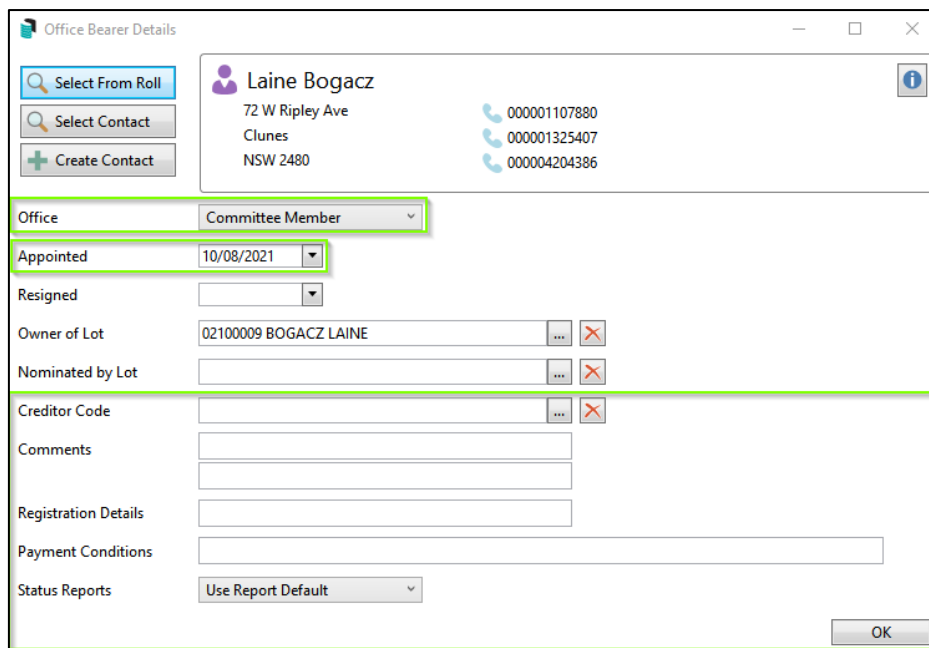


5. The Officer Bearer Details card will be presented where the following can be set:
 - Set the Office Bearer type using the drop-down selector next to 'Office'
 - Add a Creditor Code - if required
 - Add comments or registration details
 - Select if Status Reports will be sent to the Office Bearer - see below options.

Use Report Default - Status Reports will be sent based on the setting in Status Reports / Options / Set Officer Type

Always Send Report - Status Reports will be sent regardless of the setting in Status Reports / Options / Set Officer Type

Never Send Report - Status Reports will never be sent to this Office Bearer regardless setting in Status Reports / Options / Set Officer Type



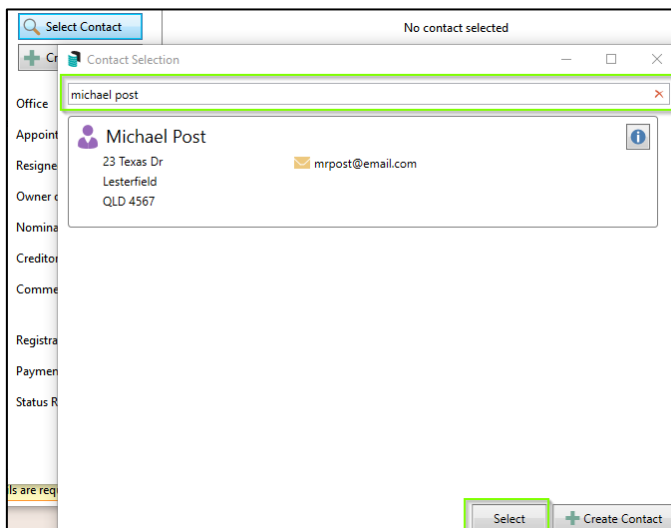
- Click OK to save the details and close the card.

Click the  icon to open the contact details card to view or edit

Select Contact

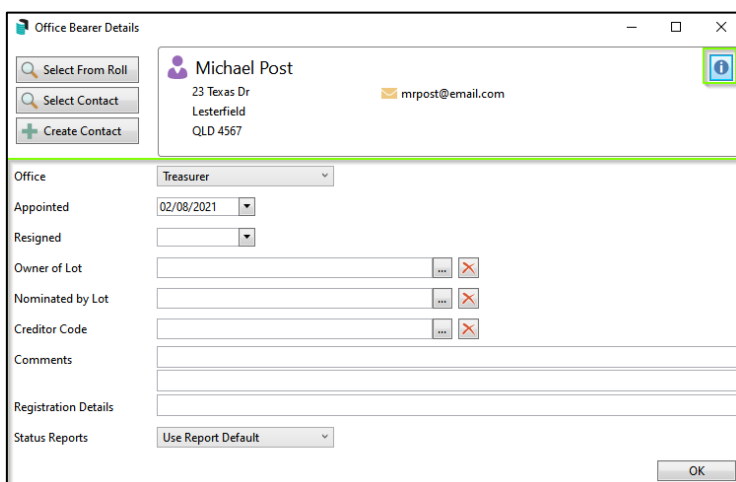
To select an existing contact, use the following instructions:

- In the Office Bearers screen click 'Add Officer'
- Click 'Select Contact'
- Use the filter to search for the contact
- Click the contact
- Click 'Select'



- The prepopulated Officer Bearer Details card will be presented where the following can also be set:

- Set the Office Bearer type using the drop-down selector next to 'Office'
- Set the Resigned Date (if necessary)
- Set the Lot owner by the Office Bearer if relevant
- Select the nominating lot if relevant
- Add a Creditor Code - if the Office Bearer is the BCM for example
- Add comments or registration details
- Select if Status Reports will be sent to the Office Bearer.



7. Click OK to save the details and close the card.


Click the  icon to open the contact details card to view or edit.

Create Contact



To create a new contact please use the following steps:


1. In the Office Bearers screen click 'Add Officer'
2. Click 'Create Contact'
3. Select 'Individual' or 'Company' to set the contact type
4. Enter the Given and Surname if and Individual contact and a Title if a Company contact

Please note: A Given / Surname is required for Individual contacts and a Title is required for Company contacts

5. Add the Reference Name if required
6. Add address and Letter Title fields if required
7. Click the  icon to add a Postal Address, Phone Number and Email Address

The screenshot shows a contact card form with three main sections: Postal Address, Phone, and Email Address. Each section is highlighted with a green border and contains a green '+' icon in the top right corner. The Postal Address section includes fields for '123 Business Lane', 'Residential/Business A', 'Marrickville', and 'NSW 2218'. The Phone section includes fields for '0297543221' (Business) and '0436557882' (Mobile). The Email Address section includes fields for 'abc@123.com' and 'abc123@abc.com'. Each entry in the Phone and Email Address sections has a red '-' icon to its right for removal.

Please note – Additional Addresses, 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 contact card the  icon will appear next to the email address field.

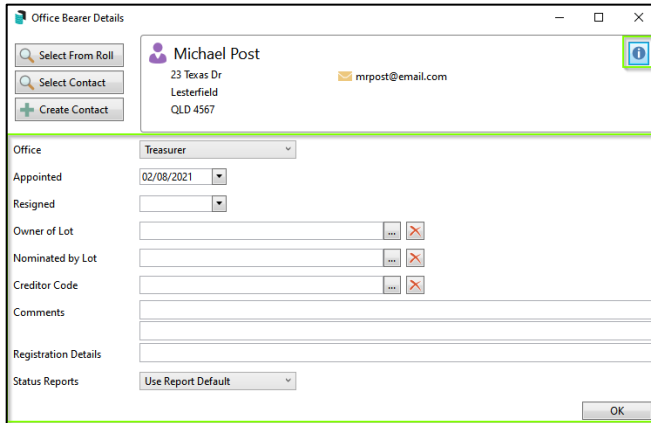
8. Add Bank Account if appropriate
9. Set the required Delivery Preferences

The screenshot shows the 'Delivery Preferences' section of the form. It contains three rows of checkboxes:

Category	Send by post	Send by email
Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Levy Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Utility Bill	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

10. Click 'Save' – A contact card will be created for the newly added Office Bearer
11. The Office Bearer Details card will be presented where the following can be recorded:
 - Set the Office Bearer type using the drop-down selector next to 'Office'
 - Set the Resigned Date (if appropriate)
 - Set the Lot owner by the Office Bearer
 - Select the nominating lot
 - Add a Creditor Code - if the Office Bearer is the BCM for example

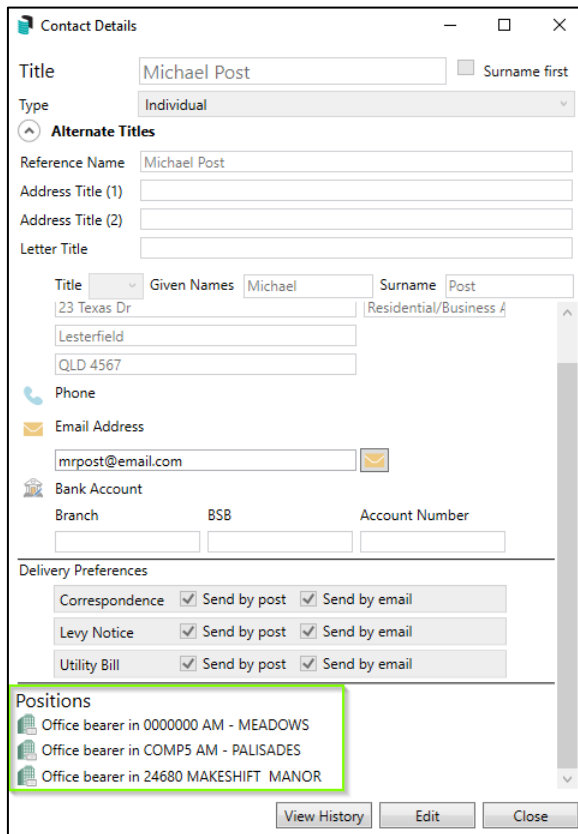
- Add comments or registration details
- Select if Status Reports will be sent to the Office Bearer.



12. Click OK to save the details and close the card.

Click the  icon to open the contact details card to view or edit.

13. Once a contact has been added as an Office Bearer, the contact card will indicate that they are an Office Bearer and the building they are associated with.



2.4 Resign an Office Bearer

Resignation of an Office Bearer can be recorded in the Office Bearer details card. Use the following steps to resign an Officer:

1. Open the Office Bearers Module in the relevant building
2. Select the edit icon beside the Office you need to resign



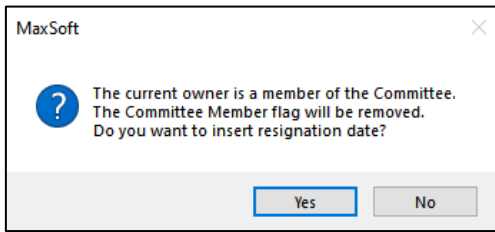
3. Add the resigned date
4. Click 'Ok

 A screenshot of a 'Office Bearer Details' form window. At the top, it shows the name 'Michael Post' and contact information: '23 Texas Dr, Lesterfield, QLD 4567' and email 'mrpost@email.com'. Below this, the 'Office' is set to 'Chairperson'. The 'Appointed' date is '01/04/2021' and the 'Resigned' date is '10/08/2021', with the latter field highlighted by a green box. There are fields for 'Owner of Lot', 'Nominated by Lot', and 'Creditor Code', each with a dropdown menu and a red 'X' icon. There are also fields for 'Comments', 'Registration Details', and 'Payment Conditions'. At the bottom, there is a 'Status Reports' dropdown set to 'Use Report Default' and an 'OK' button highlighted with a green box.

The Office Bearer icon will be greyed out to indicate they have been resigned.



Please note – If a Change of Ownership is performed in the Roll, a prompt will query if the Office Bearer should be resigned. Answering 'Yes' will insert the date into the Office Bearer record as the 'Date of Resignation'. Answering 'No' will not update the Office Bearer record.

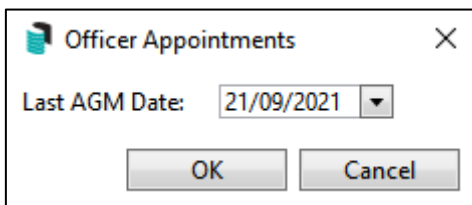


2.5 Appointments

Officer Bearer appointment dates can be quickly updated to record the Last AGM Date for the building. This also updates the 'Last AGM Meeting Date' in Info Update.

To set the Appointment Date in the Office Bearer Setup screen, please use the following instructions.

1. Click the Appointments button
2. Enter the Last AGM date
3. Click OK
4. Click Save

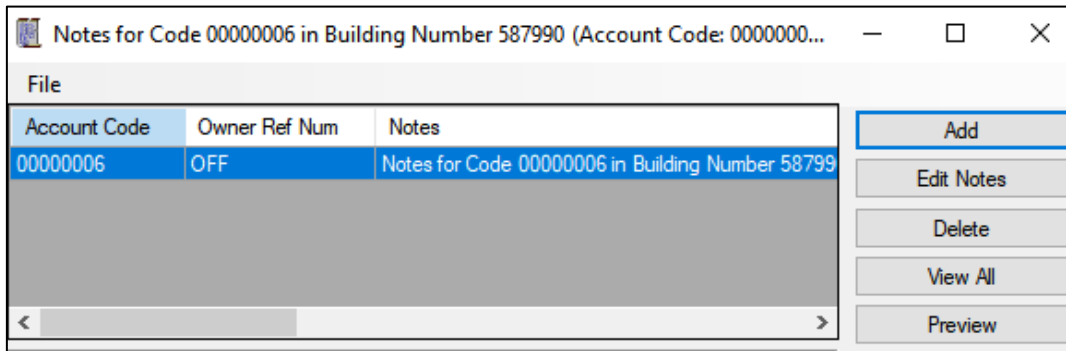


2.6 Add, Edit or Delete an Office Bearer Note

Office Bearer notes can be accessed by clicking the 'Note' icon in the Office Bearer screen.



Click 'Add' to add a note: Close and Save



The 'Notes' icon will change colour to indicate a note is attached to the record:



Click 'Edit Notes' to update a note or 'Delete' to remove.

2.7 GLMax and Sub-groups

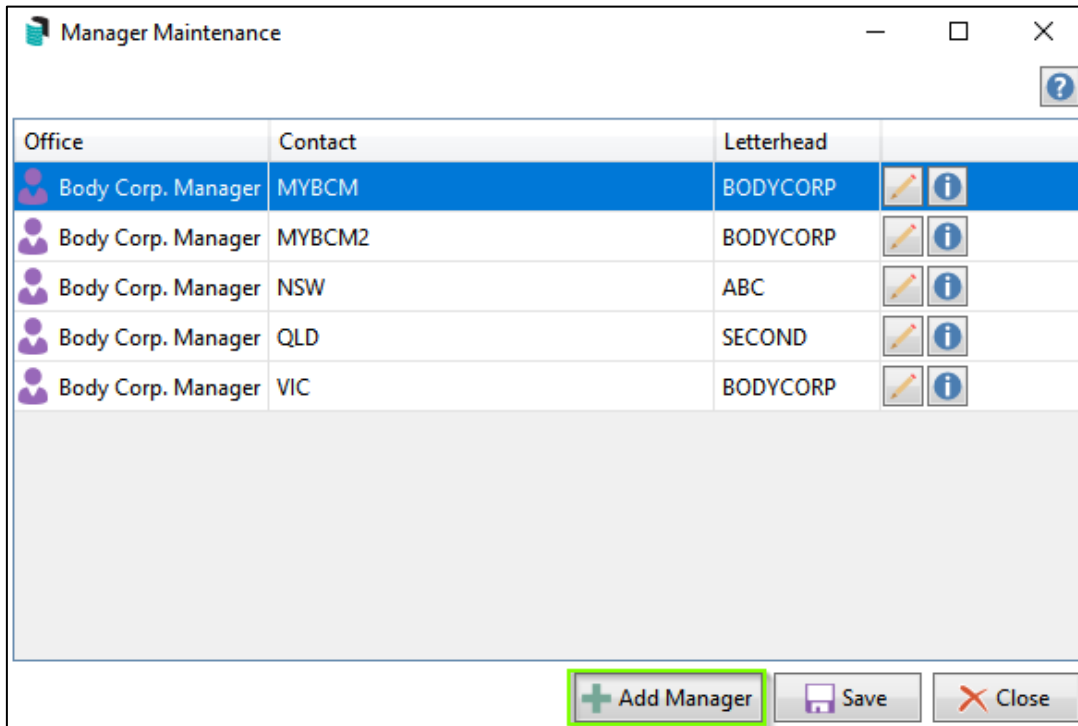
The Office Bearer module has been removed from GLMax and Sub-groups as it serves no valid purpose in these areas. Any data that has been stored under Office Bearers will no longer be accessible in the UI. If you believe you have stored records under Office Bearers in GLMax or a Sub-group, please contact Support and we can retrieve this data for you so it can be stored in a more appropriate location.

3. Manager Maintenance – Body Corporate Manager Contact

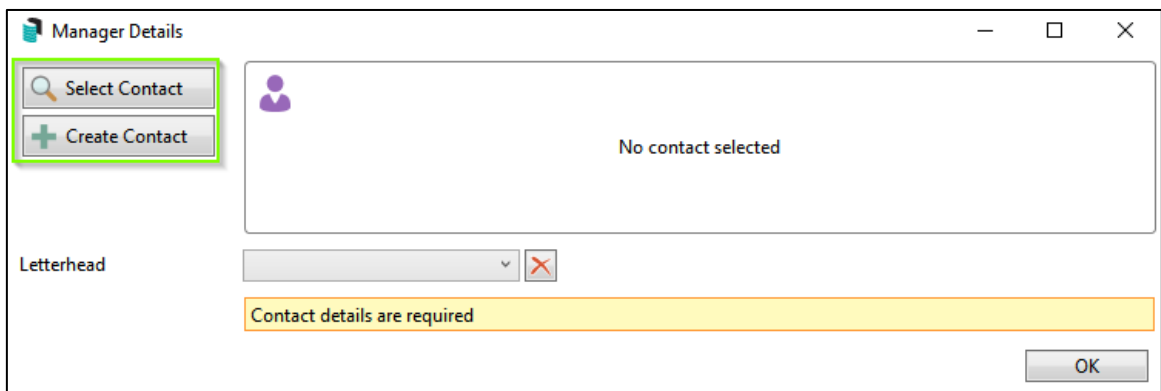
The Manager Maintenance module now incorporates the new Contact Management functionality. To add a new Body Corporate Manager, create a new contact in this screen which can then be added in the Office Bearer module.

Use the following steps to create a new Body Corporate Manager contact.

1. Open Manager Maintenance
2. Click 'Add Manager'



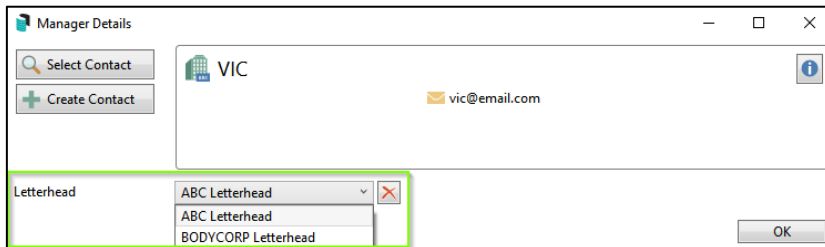
3. Click 'Select Contact' or 'Create Contact' if you have previously added the BCM as a contact.



4. Add the details for the new Body Corporate Manager
5. Set a specific Letterhead for the Body Corporate Manager office if required (See Section 2.1- Multiple Management Offices)
6. Click 'OK'
7. The contact is added as a Body Corporate Manager contact which can then be selected in the Office Bearer screen.

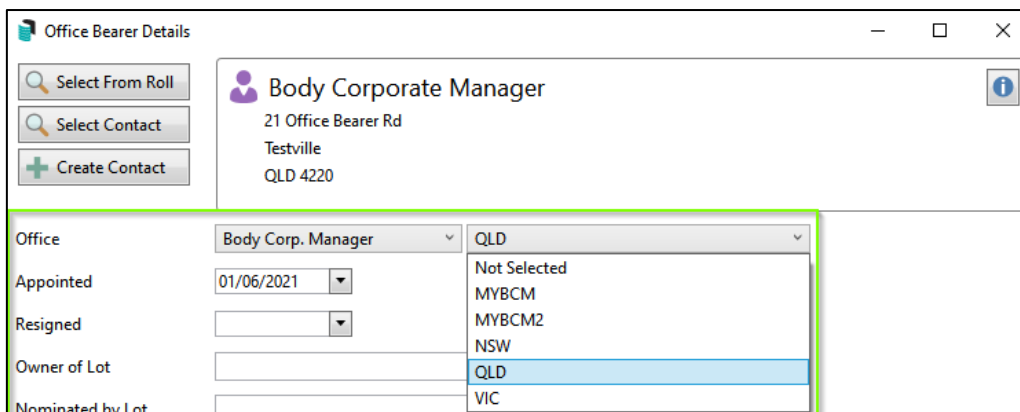
3.1 Manager Maintenance – Multiple Management Offices

Manager Maintenance provides the facility to set up multiple Management Offices and set specific Letterheads for each office if required. If a specific letterhead is selected when adding the Body Corporate Manager contact, the letterhead will be used for any building the Body Corporate Manager has been selected in.



Office Bearers setup shows the drop-down list of managers when a Body Corporate Manager position is selected based on the Manager contacts created in Manager Maintenance.

1. Open Office Bearers
2. Select the Body Corporate Management Contact
3. Select the Body Corporate Management Office from the drop-down list
4. The Letterhead set for the selected Body Corporate Management contact will be used in the building



Click the 'X' to clear the letterhead selection.

Please Note: If you have multiple management offices setup in a single drive, this should be reviewed in when updating to this version.

What's Better

- Minor issues have been addressed with Auto Rollover checks for supported banks other than ANZ/SCM and MBL.
- Enhancements have been added to the Auto Rollover to correctly check for Unprocessed banking.
- Report Set – Users no longer have to click the 'x' to close the module. Clicking 'Close' will now close the module.
- Issues have been resolved when printing to the Mailroom when not using the API by introducing new printer settings.
- Minor Issues have been addressed in the banking process where a receipt is presented through the bank for a Subgroup account that does not exist in the Main.
- Minor Issues have been addressed where a local utility template is selected and reporting incorrect template data
- Enhancements have been made to the Ledger Card to show the Period rather than Pro-Rata number of Days
- Minor issues have been resolved preventing documents from appearing in My Assigned search in some circumstances.
- Issues have been addressed for Arrears Letters ARRLET01 – 09 and these templates can now be selected.
- TRMax Reports for multi drive will now report all drive records.
- Minor issues have been addressed, where payments were still being exported when errors were reported (invalid BSB number)