

Release Notes – Version 5.6.36

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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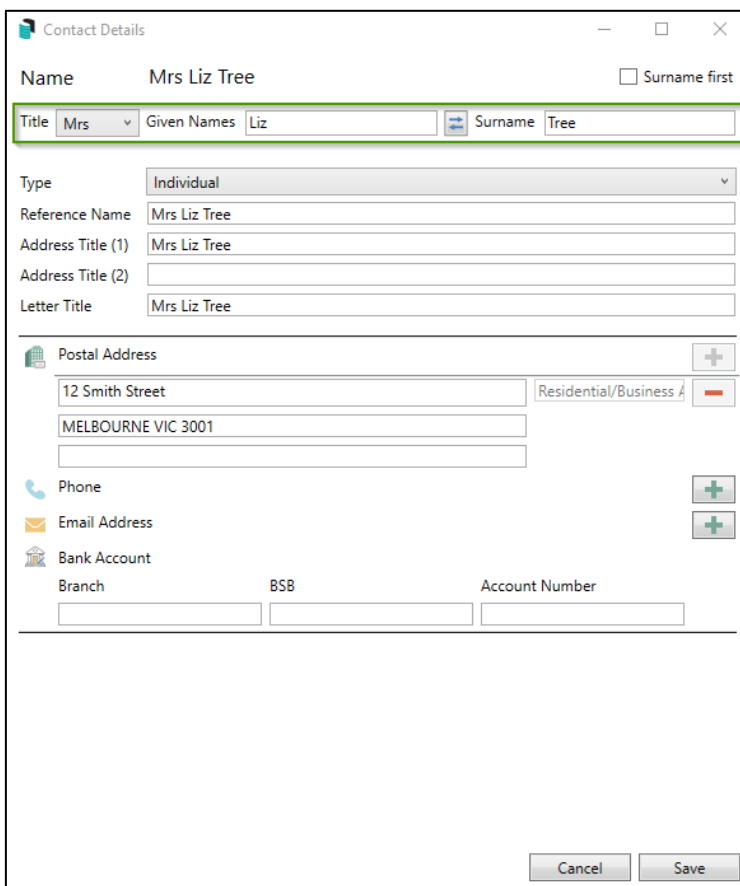
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What's New

1. Office Bearer Contacts

1.1 Create Contact – Rearrange Given/Surname

Enhancements have been made to the User Interface when creating a new contact. The 'Title, Given Name and Surname' will now be located at the top of the form below the Name (previously Contact Title)



The screenshot shows a 'Contact Details' window. At the top, the 'Name' field contains 'Mrs Liz Tree' with a checkbox for 'Surname first'. Below this, a new layout for name fields is highlighted with a green border: 'Title' (Mrs), 'Given Names' (Liz), and 'Surname' (Tree), with a swap icon between 'Given Names' and 'Surname'. Below the name fields are sections for 'Type' (Individual), 'Reference Name' (Mrs Liz Tree), 'Address Title (1)' (Mrs Liz Tree), 'Address Title (2)', and 'Letter Title' (Mrs Liz Tree). The 'Postal Address' section includes '12 Smith Street', 'MELBOURNE VIC 3001', and a 'Residential/Business' dropdown. There are also sections for 'Phone', 'Email Address', and 'Bank Account' (Branch, BSB, Account Number). 'Cancel' and 'Save' buttons are at the bottom.

1.2 Swap Given / Surname

We have added the ability to swap the Given and Surnames for Office Bearer contacts. Click the 'swap' icon to switch the Given and Surname fields. See screenshot below.

Contact Details

Name Given Name Surname Surname first

Title Given Names Given Name Surname Surname

Type Individual

Reference Name Given Name Surname

Address Title (1) Given Name Surname

Address Title (2)

Letter Title Given Name Surname

1.3 Auto-populated fields

Reference Title, Address Title1 and Letter Title fields will now be auto-populated to match Roll behaviour. Tool tips have also been added to these fields to explain where and how they are used. Hover mouse over the field heading to see the tip.

Contact Details

Name Given Name Surname Surname first

Title Given Names Given Name Surname Surname

Type Individual

Reference Name Given Name Surname

Address Title (1) Given Name Surname

Address Title (2)

Letter Title Given Name Surname

Optional: Letter title is used in the postal address for general correspondence. Limit 30 Chars.

1.4 Contact editing and validation

Edit contact validation has been changed to allow:

- Full change of given and surname on initial creation of Contact
- Small edits to given and surname at the same time after initial save
- Full change to given or surname if the other is not changed.

What's Better

- Minor issues have been addressed to no longer show inactive Management Fees in Building info.
- We have resolved some issues when Office Bearers were being viewed through Building Info.
- Disbursements – If a user has a First Name/Surname longer than 30 characters the system was generating an error, this has now been resolved.
- Transfer Out performance improvement – Timeout error on export of roll related global contacts was occurring for some buildings in some environments.
- Web API – Quarterly Management Fees will now reflect the Annual amount correctly
- Compliance – ARM Compliance XML file import no longer fails in rare cases where LicenceAndInsuranceDetailsRecord Comments were longer than 500 characters.
- Contact Management / Office Bearers – When Creating a New Office Bearer using Copy from Roll the address was missing unless the + sign was selected prior to saving. This has now been resolved.
- Contact Management / Office Bearers – at this stage when creating a contact, the Postal Address/Residential Address will be the only address visible, all other addresses for contacts will be hidden for contacts other than Agent/Mortgagees.
- Office Bearer delivery preference fields have also been hidden at this stage.
- Transfer in – The new BCM will now be selected, appointment date will be set as current date and outgoing BCM will be resigned.
- Minor issues have been addressed around the No GST setting reporting incorrectly when a DocMax document is being edited, the previous no GST value was been lost on save.