

Release Notes – Version 5.6.55

StrataMax has been dedicated to meeting the needs of Strata Managers for over 30 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. Roll Upgrade Notes.....	3
2. Contact Management.....	3
2.1 <i>Remove Unreferenced Contacts</i>	4
2.2 <i>Split Combined Owners</i>	5
2.3 <i>Merge Duplicate Contacts</i>	6
2.4 <i>Owners Office Bearers Still Unlinked</i>	6
2.5 <i>Search and Edit Contacts</i>	7
3. Desktop Search Bar	9
4. Roll Replacement.....	9
4.1 <i>Features of the Roll screen and Contact Cards</i>	10
5. Roll Menu Options.....	14
6. Roll - Change Ownership.....	15
6.1 <i>Change Ownership - Select Contact</i>	15
6.2 <i>Change Ownership - Create New Contact / Individual / Company</i>	16
6.3 <i>Change Ownership - Data Links</i>	16
6.4 <i>Add Agent, Nominee, Tenant and other positions</i>	18
6.5 <i>Remove a Contact</i>	18
6.6 <i>View History</i>	19
7. New Building Setup - Add New Roll.....	19
8. Roll Submissions - Menu Item and Dashboard Tile.....	21
8.1 <i>Unprocessed Roll Submissions Dashboard Tile</i>	21
8.2 <i>Roll Submissions Menu Item</i>	22
9. Transfer Agent Portfolio	23
10. Insurance Policy Expiry Notification	23
11. Office Bearers Report - Custom Sort Order	24
12. Data Health Check - New Dashboard Item and Report	25
12.1 <i>Data Health Check Configuration Security</i>	27
13. Process Bank Statements - Bendigo.....	27
What's Better	29

What's New

1. Roll Upgrade Notes

The Roll module has been refreshed to include an enhanced user interface which incorporates Roll into a new contact management system.

- Any Agents/Mortgagees inserted into the Levy Notice and/or Service of Notice Addresses will be displayed within the Correspondence section of the Roll.
- The Contact Card for the Owner will no longer show a Levy Notice and/or Service of Notice Address field
- The Real Estate Agent will only be displayed as a Real Estate Agent if it was in the Real Estate Agent tab prior to update
- The button in Office Bearers 'Copy from Roll' has been changed to 'Select from Roll'; review the help page for further information about this change of process. <https://smhelp.stratamax.com/help/office-bearers#add-an-office-bearer>
- The Desktop menu option 'Search Building' is no longer available as the desktop search now includes the common fields used to search for an owner/contact.

Important Note: Please review Contact Management with some priority with these areas specifically on upgrade to ensure that all areas work as expected and avoid confusion.

- Remove Unreferenced Contacts
- Merge Duplicate Contacts
- Owner Office Bearers Still Unlinked

2. Contact Management

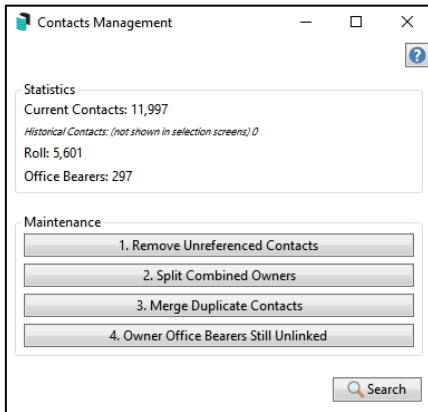
Contact Management has been designed to manage any contacts added to building records. At present it will manage existing contacts or newly created contacts for an owner, tenant, agent, office bearer, nominee or other representative contact.

Please Note: Creditor contacts will be incorporated in a later stage of the project.

From Contact Management you can:

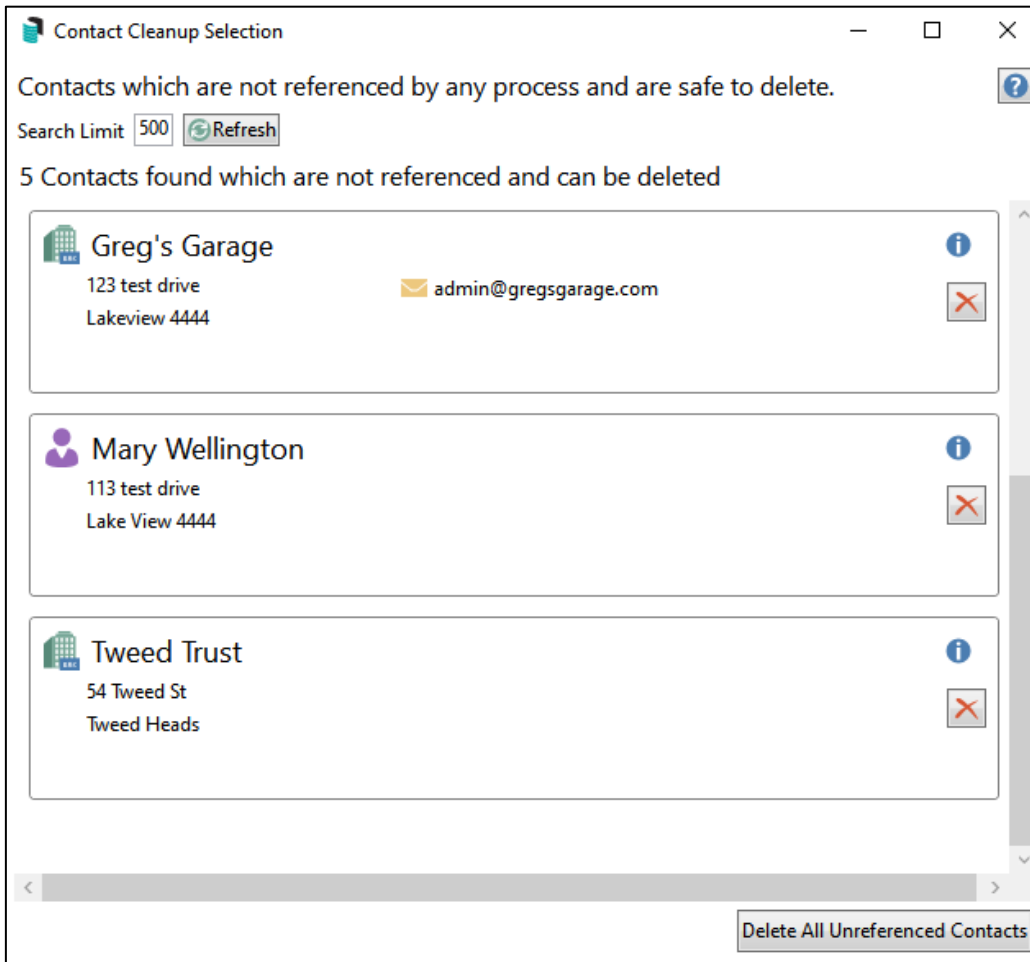
- Remove unreferenced contacts no longer required
- Split combined contacts to individual contacts
- Merge duplicate contacts that may have been added over time

- Review inconsistencies in Office Bearer and Owner contact details
- Search for and edit Contacts



2.1 Remove Unreferenced Contacts

These are Contacts which are not referenced and are safe to remove.



Click the following link to navigate to the Help page for this topic:

[Remove Unreferenced Contacts](#)

2.2 Split Combined Owners

These are ‘individual’ type owners and should be split into separate contacts.

Please Note: Once a combined contact is split, Roll Submissions will only be applied for the first contact listed in the Owners Details window. Change of Roll details for contacts beyond the first listed will need to be processed manually.

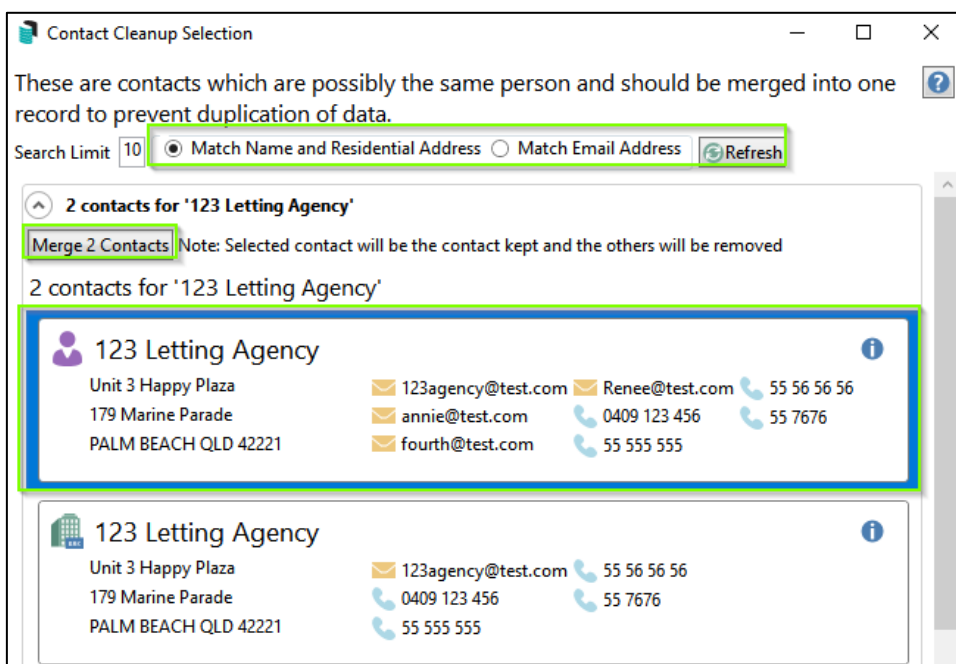
Click the following link to navigate to the Help page for this topic:

[Split Combined Owners](#)

2.3 Merge Duplicate Contacts

Use 'Merge Duplicates' to tidy up duplicate contacts; this will help avoid user confusion when selecting a contact.

Use 'Owner Office Bearers Still Unlinked' to link committee members back to existing roll records.

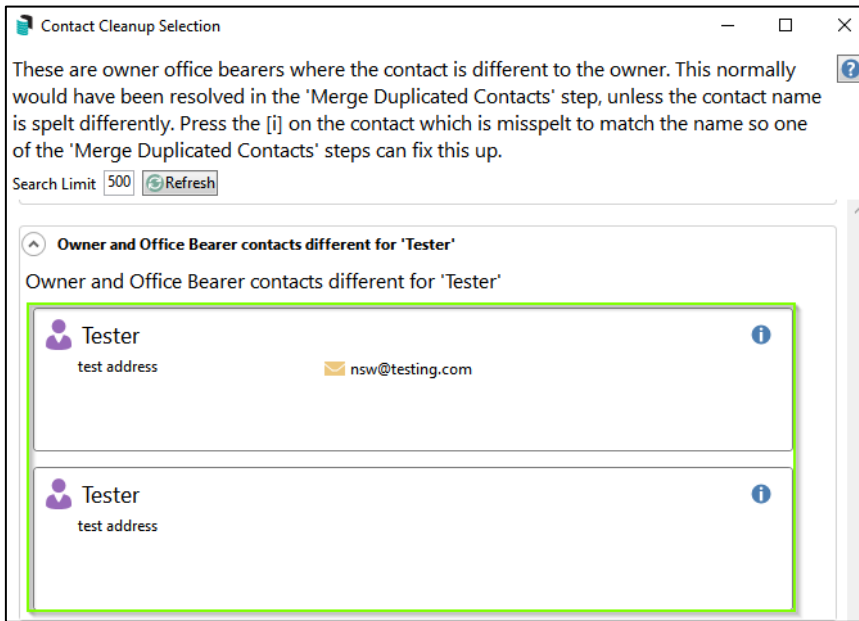


Click the following link to navigate to the Help page for this topic:

[Merge Duplicate Contacts](#)

2.4 Owners Office Bearers Still Unlinked

These are Office Bearers where the contact is different to the set Owner of Lot contact. This would normally be resolved using Merge Duplicate Contacts however could be missed if a record is misspelt. Click the icon **i** to review and change any misspelt or incorrect records, these can be cleaned up using the Merge Duplicate Contacts option.



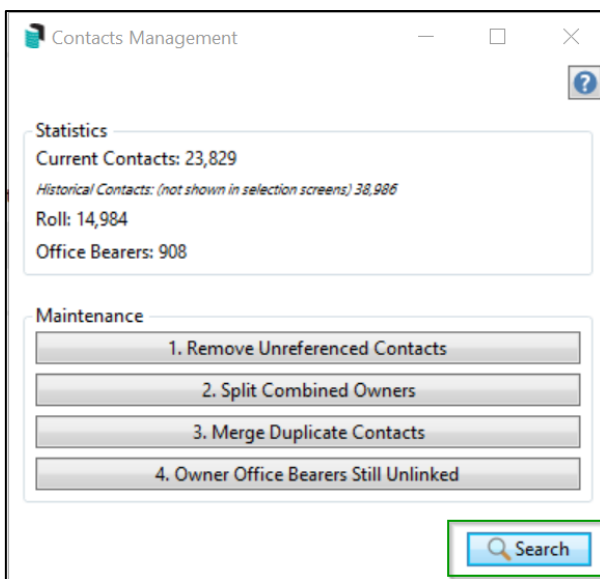
Click the following link to navigate to the Help page for this topic:

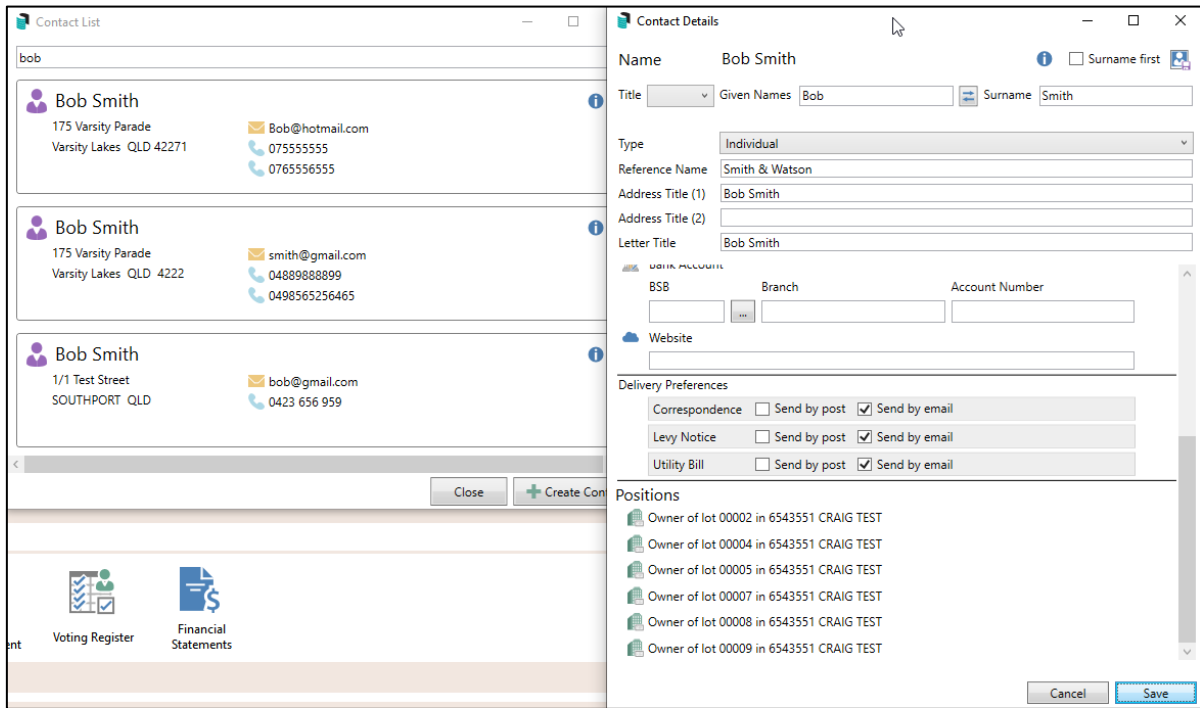
[Owner Office Bearers](#)

2.5 Search and Edit Contacts

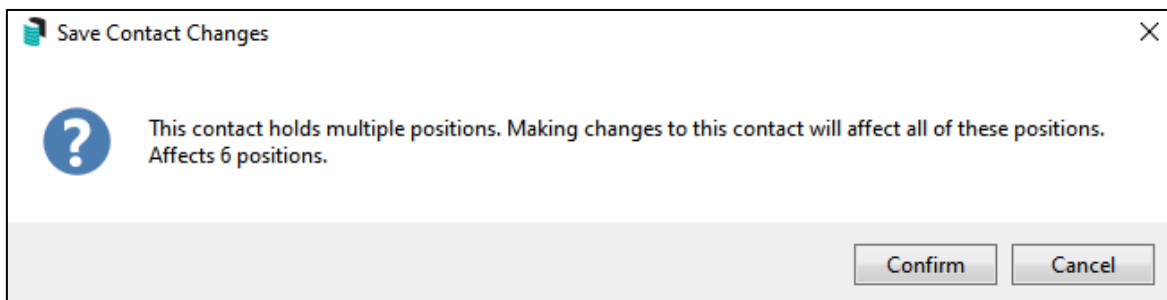
Contacts can be edited from within Contact Management and will update contact details for any lot the contact is associated with.

To search for a record, click on the 'Search' button once Contact Management module is open and enter a contact into the top field





A prompt will be presented to confirm changes to all affected accounts. Click 'Confirm' to complete the change or 'Cancel' to prevent any changes.



Click the following link to navigate to the Help page for this topic:

[Search and Edit Contacts](#)

Please Note: If a contact is edited in the Roll using the pencil, there will be no prompt or warnings that any record using the same contact will be updated.

Using the  icon will prompt for confirmation.

3. Desktop Search Bar

The desktop search bar can be used to search for contacts and lots based on the below fields:

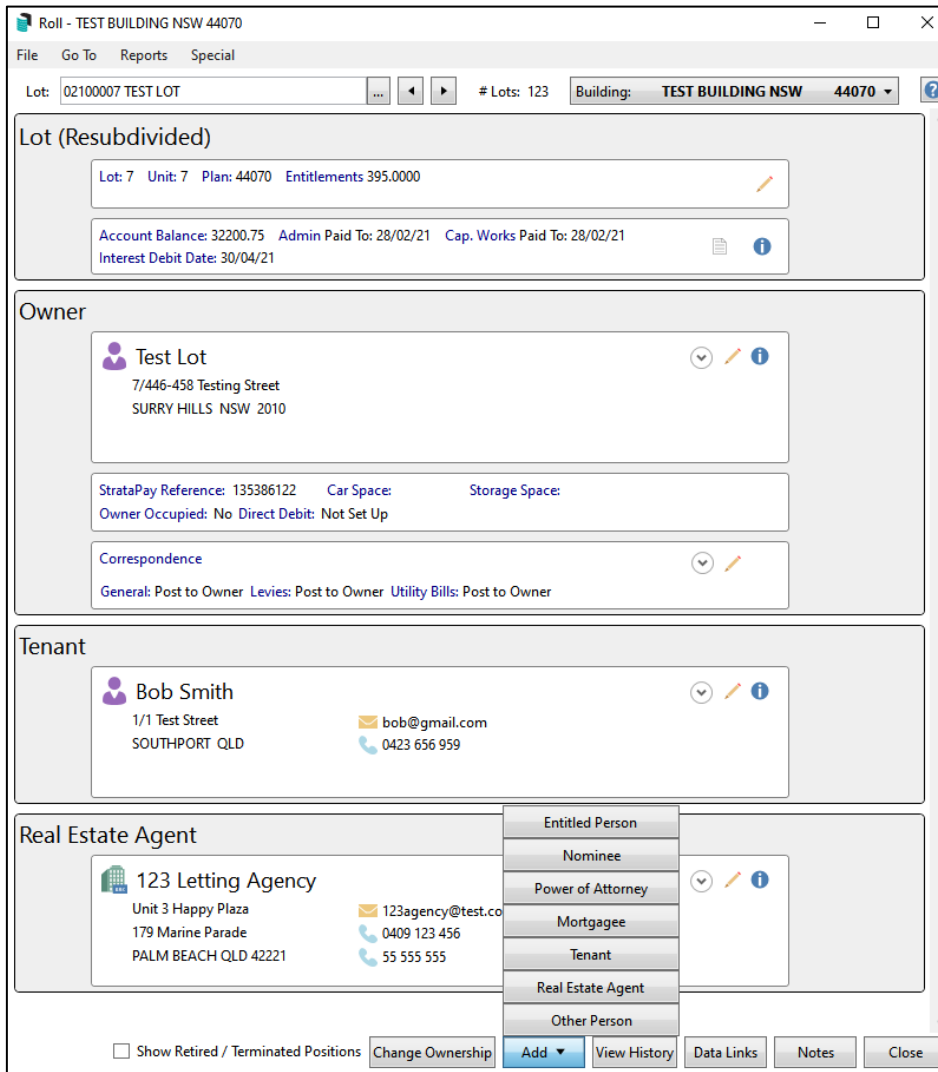
- Contact Name
- Contact Email Address
- 9-digit StrataPay number
- Lot Address Field

If using multiple StrataMax drives and less than 10 results in the drive you are in are found, results from other drives will also display. Clicking on the result will take the user to the appropriate drive and record. This search across drives also applies to searching for buildings based on building name, number and address.

4. Roll Replacement

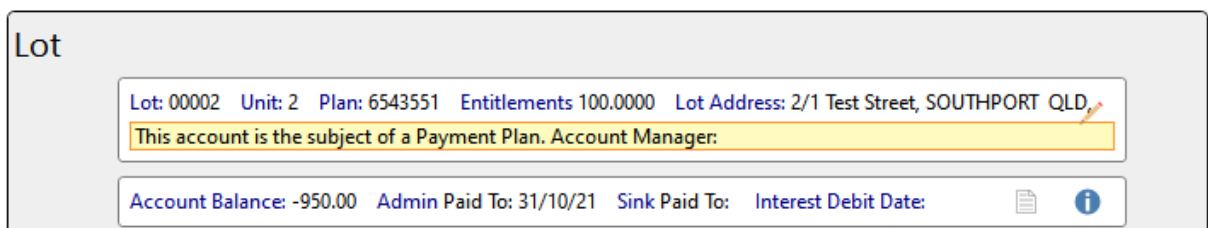
The Roll interface has been extensively enhanced to provide a clearer overview of lot details while maintaining current functionality. Some new aspects of the Roll include the ability to:

- Select an existing contact without the need to re-enter any data
- Add a new contact and use for multiple lots or areas within the system
- View the owners, agents and associated contacts in one screen
- Add or change owners, agents and associated contacts in one screen
- Set or create a range of contact types.
- New plan setup screen which can access Roll to add existing contacts or add a new one and apply to all lots
- Show Retired / Terminated positions
- Opt to send Levies and correspondence to "Other" person




4.1 Features of the Roll screen and Contact Cards

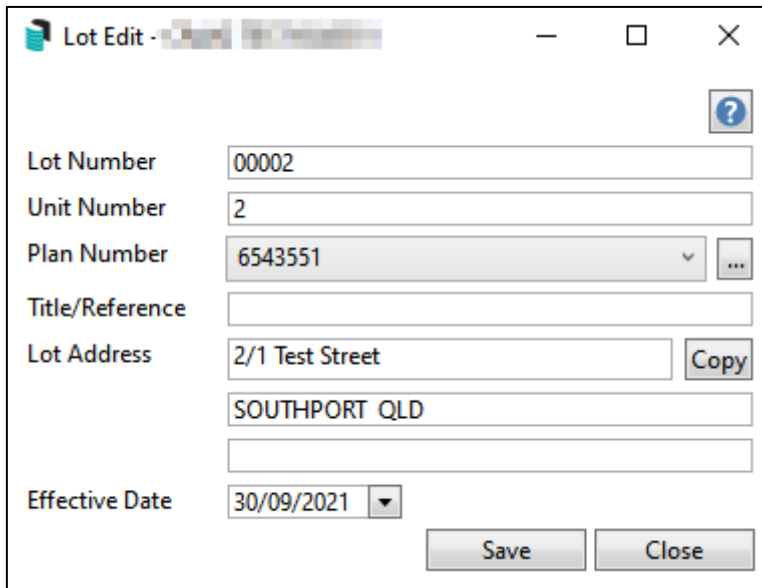
4.1.1 Lot Details window



The Lot details window can display the following information:

- Lot balance and entitlements
- Fund paid to dates and Account Balance
- Interest Dates
- Any legal action or payment plan notices
- Lot Address
- Will advise if a lot has been resubdivided

 Click the pencil icon to edit Lot details or copy the lot address



Lot Edit - [blurred]

Lot Number: 00002

Unit Number: 2

Plan Number: 6543551


Title/Reference: [empty]

Lot Address: 2/1 Test Street **Copy**

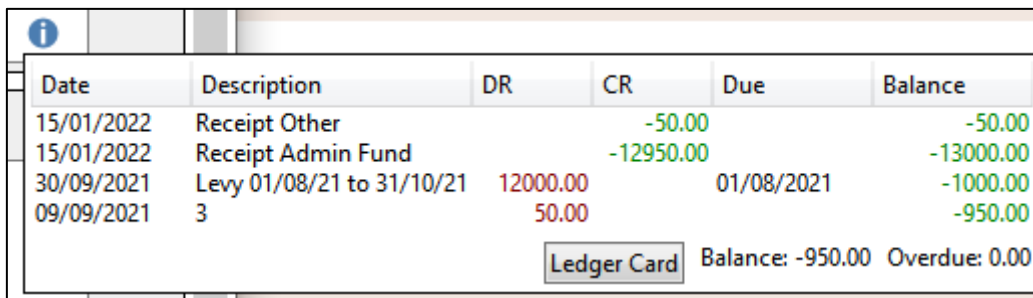
SOUTHPORT QLD

Effective Date: 30/09/2021

Save **Close**

 Click the documents icon to view any documents that have been associated with the lot in DocMax. Levy Notices stored in DocMax will show here and include the recipient if emailed.

 Click the Info icon to view ledger data or open the ledger card to screen



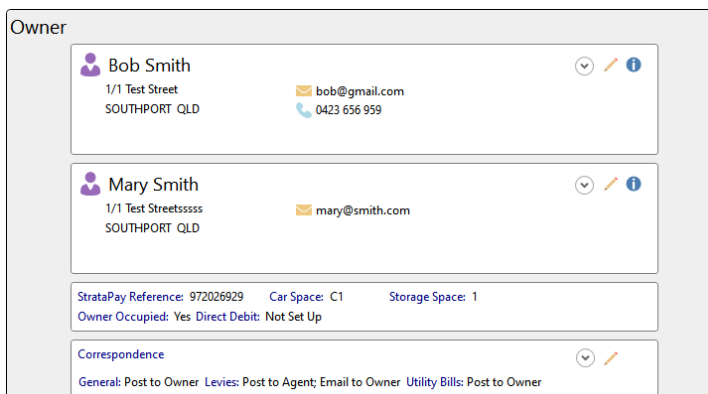
Date	Description	DR	CR	Due	Balance
15/01/2022	Receipt Other		-50.00		-50.00
15/01/2022	Receipt Admin Fund		-12950.00		-13000.00
30/09/2021	Levy 01/08/21 to 31/10/21	12000.00		01/08/2021	-1000.00
09/09/2021	3	50.00			-950.00

Ledger Card Balance: -950.00 Overdue: 0.00


4.12 Ownership Contacts Window


The ownership window will show the contact cards of the owner/s as well as:


- The StrataPay Reference Number
- If the lot is a car or storage space
- If the lot is owner occupied
- General correspondence and Notice preferences
- Whether a Direct Debit is set up



In the owner contact card window:

-  Click the arrow to expand the contact card view which will show the contact details entered for the owner as well as any positions, including Office Bearer, held by the contact.


-  Click the Info icon to View or Edit owner contact details and view the history of any changes made to the contact.

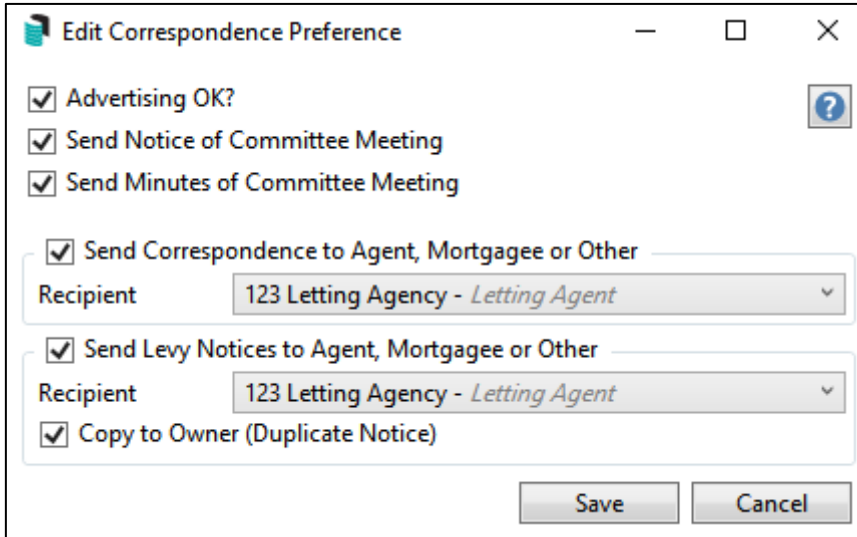
-  Click the pencil icon to complete a change of contact details for the owner including contact preferences.

The Correspondence window: will show contact preferences set for general correspondence for owners unless set to send to agents or other. Levy and Arrears notices will show preferences for multiple owners and agents or other as well as the owners if set to send to both.

Click the arrow to expand the view and review all preferences

General:	Levies:	Utility Bills:
Post to Owner	Post to Agent; Email to Owner	Post to Owner
Email:	bob@gmail.com; mary@smith.com	
Post:	1/1 Test Street SOUTHPORT QLD	Ray White (Ringwood) Ray White 1/1 Test Street SOUTHPORT QLD (Ringwood) Ray White (Ringwood)
Advertising OK: No Send Minutes of Committee Meeting: Yes Send Notice of Committee Meeting: Yes		
Duplicate Notice: No		

 Click the pencil icon to set Advertising, Committee correspondence and preferences and whether to send to notices or correspondence to Agent, Mortgagee or Other. For example, a Nominee or Power of Attorney can also be selected here to receive general correspondence or notices.



Please Note: Where 'Send Levy Notices to Agent, Mortgagee or Other' is set, if 'Copy to Owner (Duplicate)' notice is ticked, Levy and Arrears notices will be posted or emailed to the owner as well as the Agent, Mortgagee or Other contact based on individual contacts email/mail preferences. If there are multiple owner contacts where the postal address is an exact match between two contacts it will only post one copy of the notice. If no preferences are set, no notice will be produced for that contact.

Where 'Send Correspondence to Agent, Mortgagee or Other' is set, correspondence and levy notices will be sent to Agent or Other.

5. Roll Menu Options

The Roll menu options have changed as most tools and options have now been incorporated into the Roll screen. Essential options have been retained as menu items.

Click the following links to navigate to the Help pages for this topic:

[Roll Configuration](#)

[File](#)

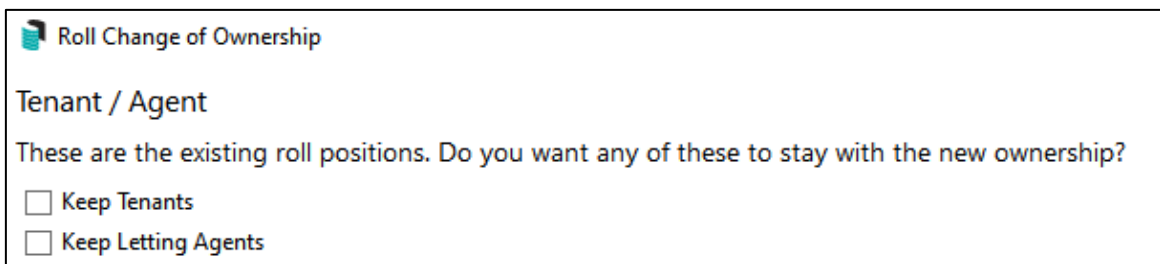
[GoTo](#)

[Reports](#)

6. Roll – Change Ownership

The steps to complete a Change of Ownership have now changed and Help has been updated to assist with this process. Please refer to the links below for instructions.

Please Note: If any Office Bearer, Agent or Nominee positions are associated with the lot, a prompt will be presented to retain or retire the position.



Roll Change of Ownership

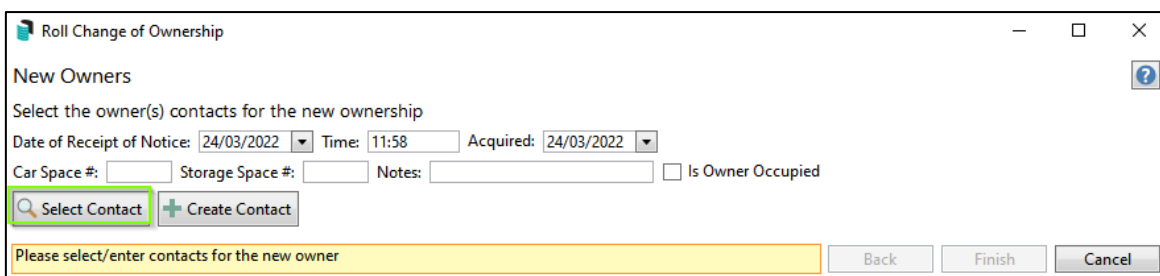
Tenant / Agent

These are the existing roll positions. Do you want any of these to stay with the new ownership?

Keep Tenants

Keep Letting Agents

6.1 Change Ownership – Select Contact



Roll Change of Ownership

New Owners

Select the owner(s) contacts for the new ownership

Date of Receipt of Notice: 24/03/2022 Time: 11:58 Acquired: 24/03/2022

Car Space #: Storage Space #: Notes: Is Owner Occupied

Please select/enter contacts for the new owner

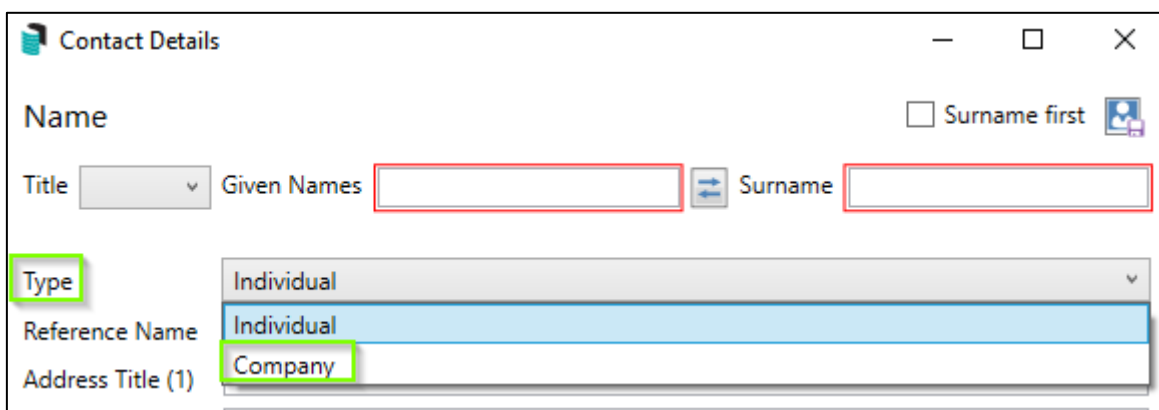
Click the following link to navigate to the Help page for this topic:

[Change Ownership - Select Contact](#)

6.2 Change Ownership – Create New Contact | Individual / Company



The screenshot shows the 'Contact Details' window. The 'Name' section includes a 'Surname first' checkbox and a person icon. Below this are fields for 'Title' (a dropdown), 'Given Names' (a text input), and 'Surname' (a text input), with a double-headed arrow between them. The 'Type' dropdown menu is highlighted with a green box and is currently set to 'Individual'. Below the 'Type' field is a 'Reference Name' field.



The screenshot shows the 'Contact Details' window with the 'Type' dropdown menu open. The 'Type' field is highlighted with a green box. The dropdown menu shows 'Individual' as the selected option, with 'Company' also visible and highlighted with a green box. Below the dropdown are fields for 'Reference Name' and 'Address Title (1)'.

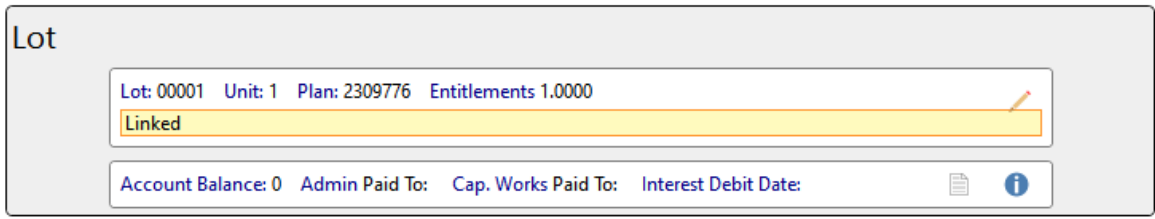
Click the following link to navigate to the Help pages for this topic

[Change Ownership - Create New Contact | Individual](#)

[Change Ownership - Create New Contact | Company](#)

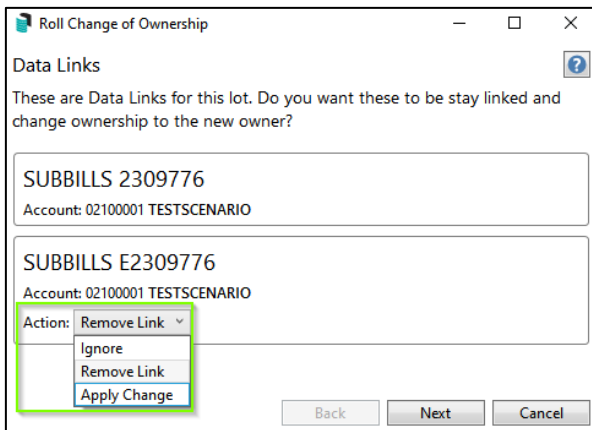
6.3 Change Ownership – Data Links

If there is a data link between two or more lot accounts and one of these lots is now owned in a different name, the newly acquired lot account should be unlinked to allow the new ownership to apply. If there is a sub group within the building and the billing is applied to owners, this should be considered first before unlinking the accounts. The Lot details window will display a message if the Lot is linked.



After selecting Change of Ownership, the Action drop down will be presented below the linked lot providing the following options

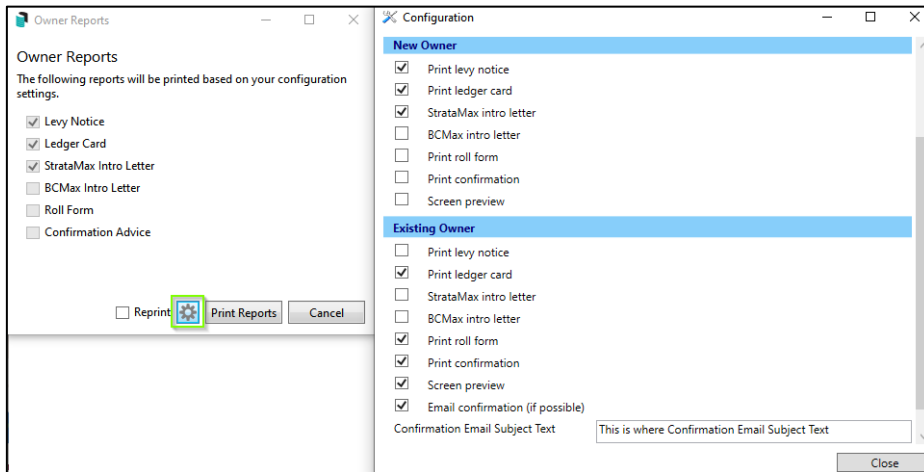
- **Ignore:** Keep the data link in place with the original details once the change is processed
- **Remove Link:** Remove the data link once the change is processed
- **Apply Change:** Applies the new owner details to the linked account once the change is processed



Click the following link to navigate to the Help page for this topic

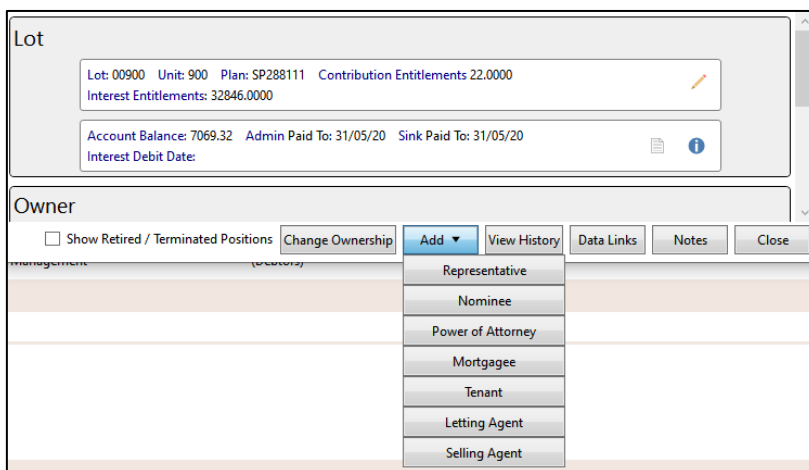
[Data Links](#)

Please Note: Any Change of Ownership or Change of Details will trigger a prompt to print configured reports. E.g. StrataMax Intro Letter or Roll Confirmation. Click the settings cog to configure which reports are printed or click cancel if not required.



6.4 Add Agent, Nominee, Tenant and other positions

Add Entitled Person, Nominee, Power of Attorney, Tenant, Real Estate Agent and Other Person records to a lot account from the Roll screen



Click the following link to navigate to the Help page for this topic

[Add Agent, Nominee, Tenant and other positions](#)

6.5 Remove a Contact

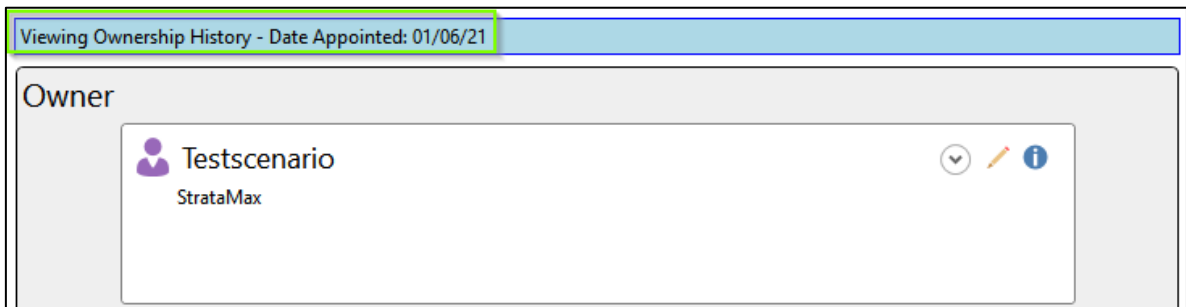
If a contact is no longer associated with the lot account, this information can be removed from the lot account.

Click the following link to navigate to the Help page for this topic

[Remove a Contact](#)

6.6 View History

Changes made to lot details are recorded and can be reviewed and edited using View History. The selected contact will show a message advising that the record is being viewed in History Mode

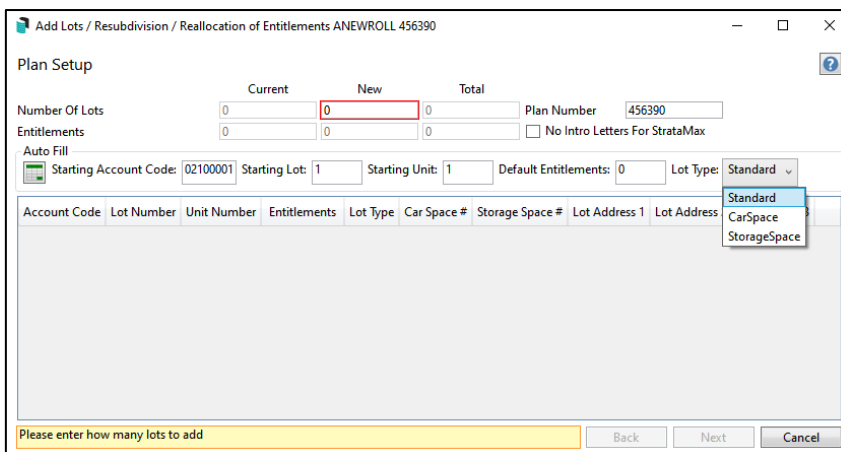


Click the following link to navigate to the Help page for this topic

[View History](#)

7. New Building Setup – Add New Roll

Adding a new Roll will now follow a similar process to a resubdivision. After a new building is created, opening Roll will present the following screen.



1. Add the number of lots required under New
2. Review Auto Fill data and modify if appropriate
3. Add the number of required default Entitlements
4. Set the Lot Type from the following options

- Standard
 - Car Space
 - Storage Space
5. Add a Lot Address (optional)
 6. Click 'Next'
 7. Click 'Select Contact' or 'Create Contact' if adding a new contact
 8. Select or Create the contact – if the contact exists, the system will autofill the details once selected. If a new contact is created, the system will autofill with the new contact details

Add Lots / Resubdivision / Reallocation of Entitlements ANEWROLL 456390

Owner Details ?

Original Owner

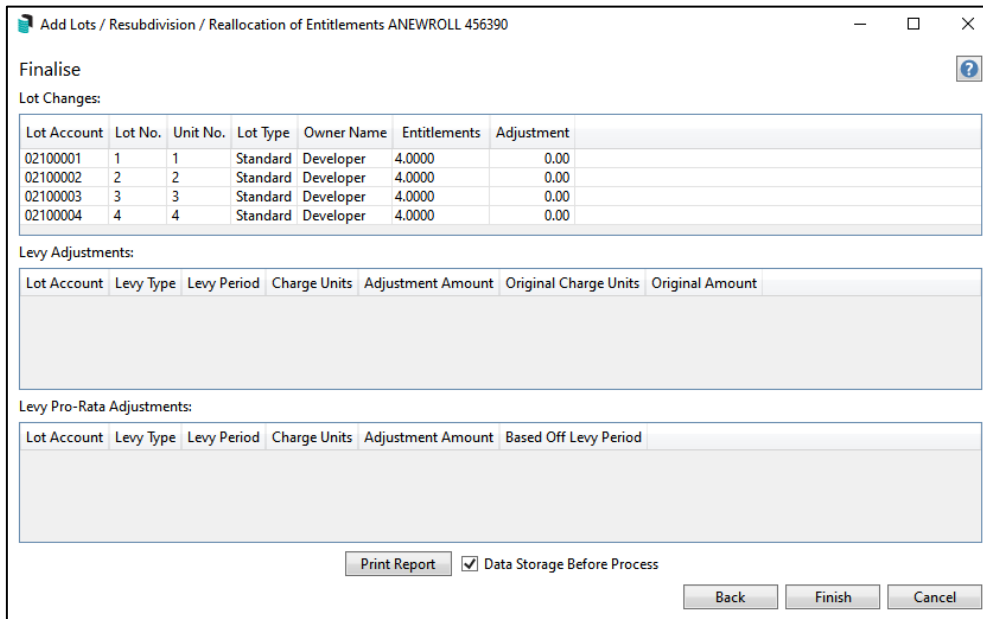
Auto Fill

Apply Contacts To All Select / Create Contacts

Account Code	Lot	Unit	Name	Reference	Address Title (1)	Address Title (2)	Letter Title
02100001	1	1	Developer	DEVELOPER	Developer		Developer
02100002	2	2	Developer	DEVELOPER	Developer		Developer
02100003	3	3	Developer	DEVELOPER	Developer		Developer
02100004	4	4	Developer	DEVELOPER	Developer		Developer

Back Next Cancel

9. Validation messages will prompt for any missing mandatory fields
10. Click 'Next'
11. Review the new lots on the Finalise screen
12. Click 'Print Report' to output the data to screen, pdf report or Excel
13. Click 'Finish'



Click the following link to navigate to the Help page for this topic

[Add New Lots](#)

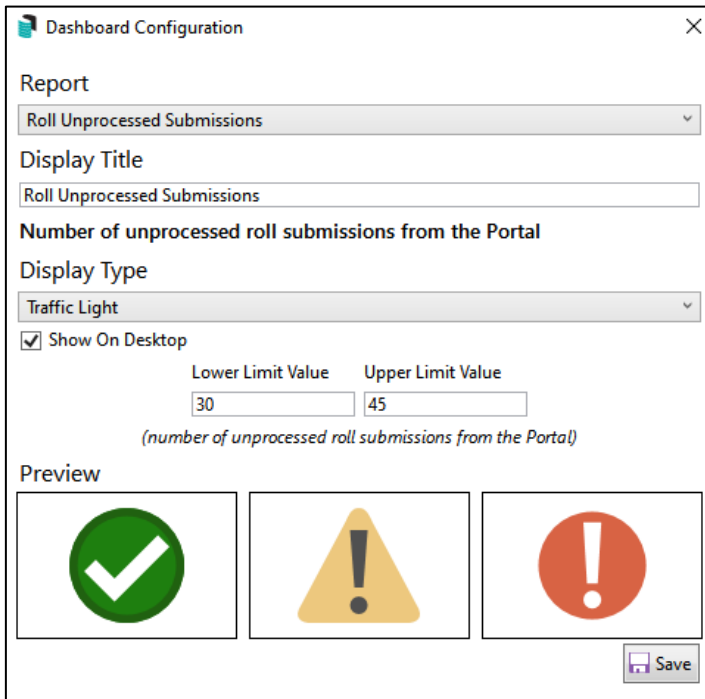
Use the link below to review the FAQ in Help for Roll Contacts.

[Roll Contact FAQ](#)

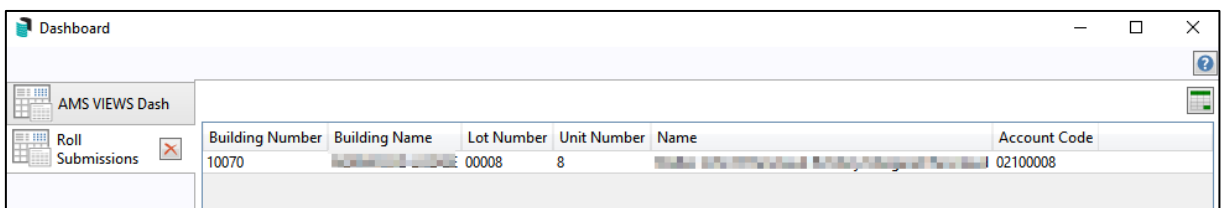
8. Roll Submissions – Menu Item and Dashboard Tile

8.1 Unprocessed Roll Submissions Dashboard Tile

A tile to show unprocessed Roll Submissions is now available to add to the desktop Dashboard.

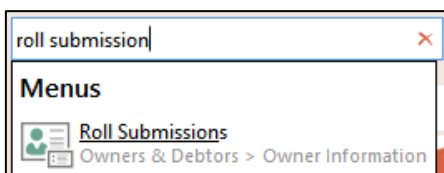


The tile will show any unprocessed Roll Submissions when selected. The data can also be exported to Excel.

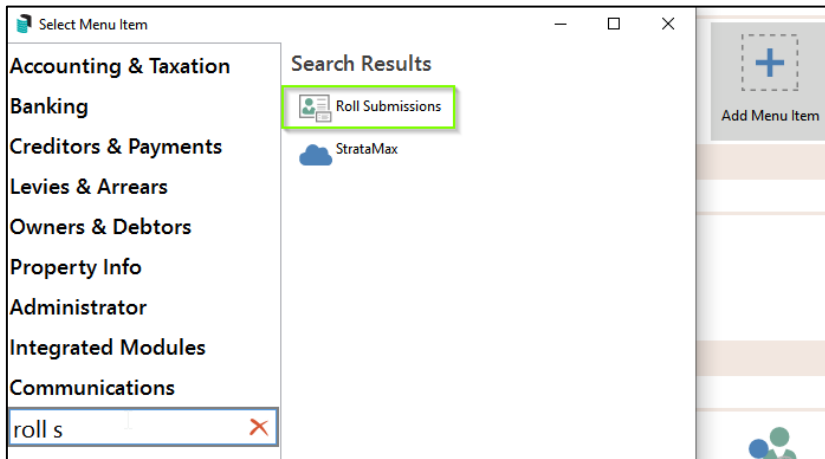


8.2 Roll Submissions Menu Item

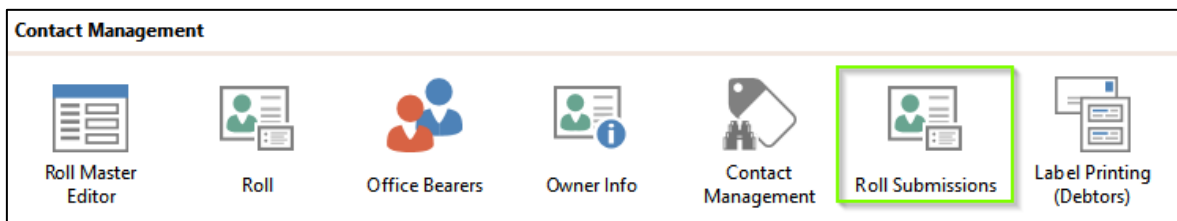
Roll Submissions can now be accessed using a new Roll Submissions menu item. Search Roll Submissions on the desktop to access the new item.



An icon can also be added to any user group desktop by clicking the pencil icon to edit the desktop, search and add Roll Submissions.



The icon will then be available in the user desktop.



Please navigate to the link below for further information regarding the Roll Submission process

[Roll Submission](#)

9. Transfer Agent Portfolio

The Transfer Agent Portfolio has been created to assist with the migration of records when some or all of a Real Estate Agents portfolio is moving to a new Real Estate Agent.

Click the following link to navigate to the Help page for this topic

[Transfer Agent Portfolio](#)

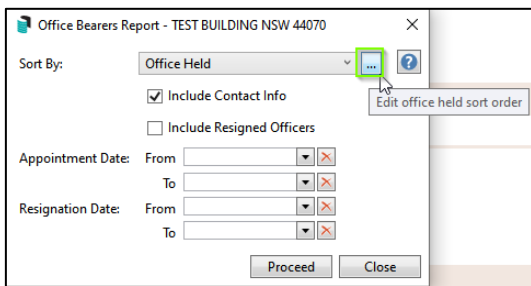
10. Insurance Policy Expiry Notification

The Insurance Policy Notification message will now be displayed beside the building selector. The notification will be based on the expiry date set for Insurance Code 901.

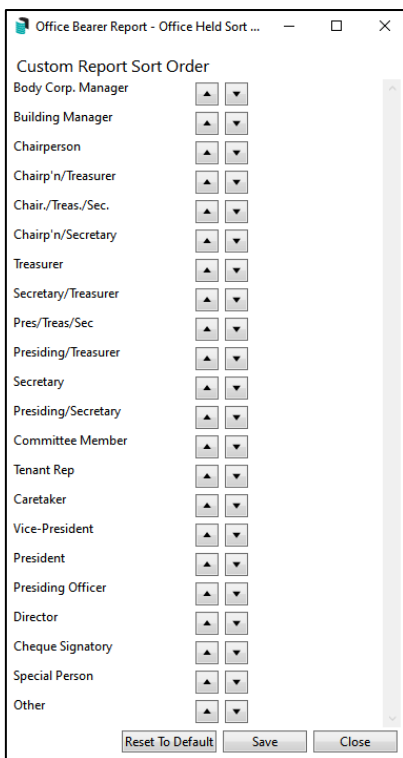
Building: TESTINFOUPDATE 7784415 ▾	Main ▾	A/c Manager:	Insurance Policy for 901 BUILDING has expired! Due Date is 01/03/21
Current Year: 01/04/2020 to 31/03/2021 ▾	Lock ...	Current Month: March 2021	
		Working Date: 10/06/2022 ▾	

11. Office Bearers Report – Custom Sort Order

Office Bearer Reports can now be customised to display Office Bearers in any order. Open Office Bearer Report or select Report from the Office Bearer screen and click the ellipses next to the 'Sort By' option to view and modify the order in which officers will be displayed on the report.



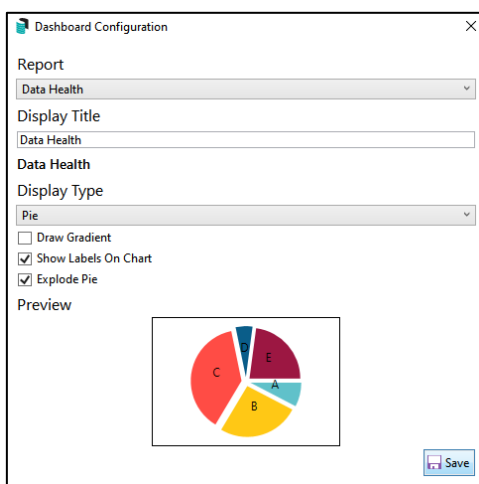
Click the arrow up or down corresponding to the officer position you need to move until set to required display order. Click 'Reset to Default' to restore original order.



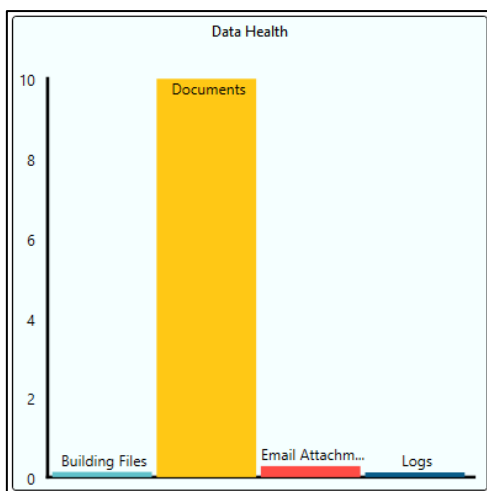
12. Data Health Check – New Dashboard Item and Report

A new report item has been added to the Administrator Dashboard to facilitate review and configuration of building data file retention. Initially, the report will show the number of Building Files (Backups and Banking Files), Expired DocMax Documents, Stored Reports, Emails and Logs. These settings were previously managed by the Support team and were configured at request but can now be managed in BCMAX using Data Health Check configuration.

To add this report, open Dashboard, click 'Add Dashboard item' and select 'Data Health'. Set your preferred display type and Save.



The Data Health tile will be added to the Admin Dashboard.



Drill into the Dashboard tile and click the cog to configure retention timeframes.

Data Health Report			
Name	Description	Size	Count
Buildings	Building Files	13.1 MB	5
Documents	Documents	14.9 GB	41,700
Emails	Email Attachments	36.6 MB	685
Logs	Logs	23.6 MB	208,884

- Any configuration items that are defaulted to '0' will be disabled and the schedule will not run for these items.
- Any defaults previously set by Support for Database Backups, Stored Reports or Email retention will be migrated to here and can be modified.
- The current settings for DocMax Auto delete expired documents and No of Months of Emails to keep will be migrated to here.
- Log retention will default to the values below if not currently set.

Building Files

No. of Months to keep backups:

No. of Years to keep Banking files:

Documents

Auto delete expired documents

No. of Years to keep Stored Reports:

Emails

No. of Months of Emails to keep:

Logs

No. of Months to keep Trace logs:

No. of Months to keep Info logs:

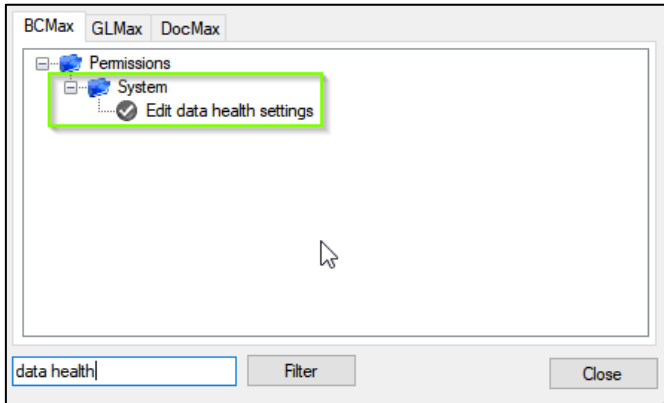
No. of Months to keep Warning logs:

No. of Months to keep Error logs:

Please Note: We recommend you take extreme care and consideration before setting any timeframes for these items as it could lead to data being deleted that may be required at a later date.

12.1 Data Health Check Configuration Security

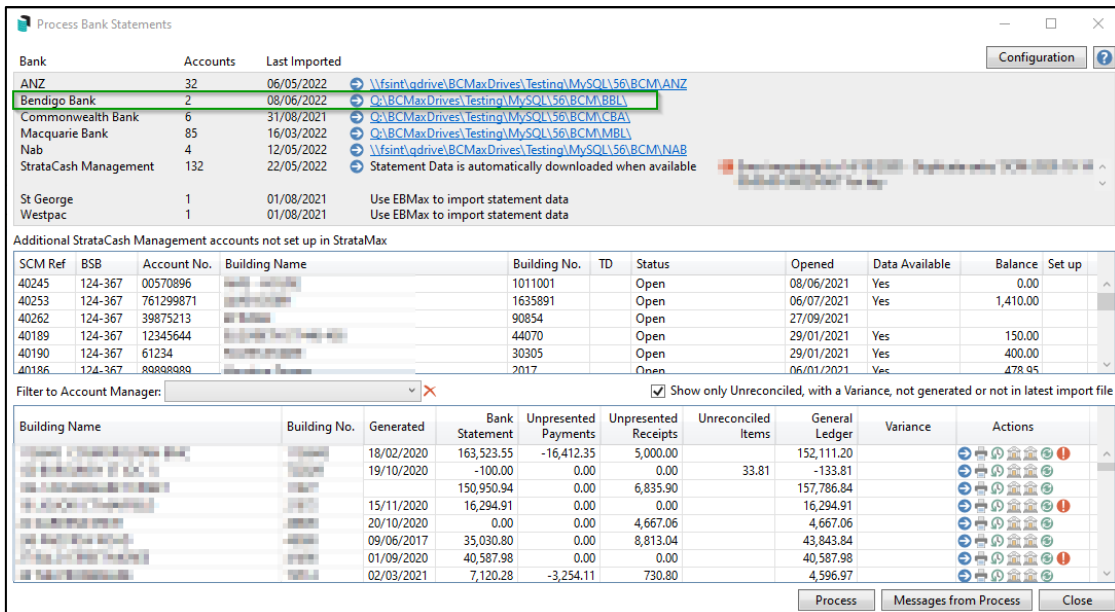
Access to the configuration screen will be regulated by a new security control called 'Edit data health settings.' Open security and use the filter to search for 'Edit data health settings' to modify access permissions. The setting will be set to Allow for Administrators only on upgrade.



13. Process Bank Statements – Bendigo

Enhancements have been made to import Bendigo (BBL) banking once banking files are downloaded daily using 'Process Bank Statements' icon as shown below:

The Process Bank Statements module is designed to give the users a central point to view and action daily banking for all buildings and all banks.



Please Note: All banks **except** for StrataCash Management, MBL, CBA, NAB, ANZ and BBL will need to continue using EBMax to import statement data before using Process Bank Statements.

What's Better

- Bank Reconciliation issues are now resolved where button options were missing if there were large number of messages for a statement item
- Enhancements have been made to identify unrepresented items from the sub-group which will now show correctly with a variance
- Bank Reconciliation sort orders on retrieved statement items have been resolved
- Issues have been resolved in Bank Reconciliation were an invalid date error was occurring on reverse receipts.