

Release Notes – Version 5.6.74

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



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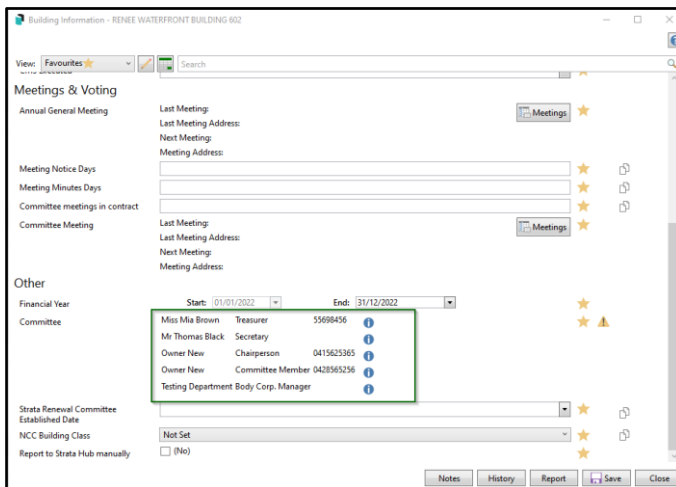
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What's New

1. Building Information – Office Bearer Mobile/Contact Details

Building Information has been enhanced to now include an extra column that will display the mobile number for the committee members. This will provide quick access to contact numbers.

Please note: If no mobile number is set in the Office Bearers record then it will display a number set as home if available.



2. Roll/Plan Report

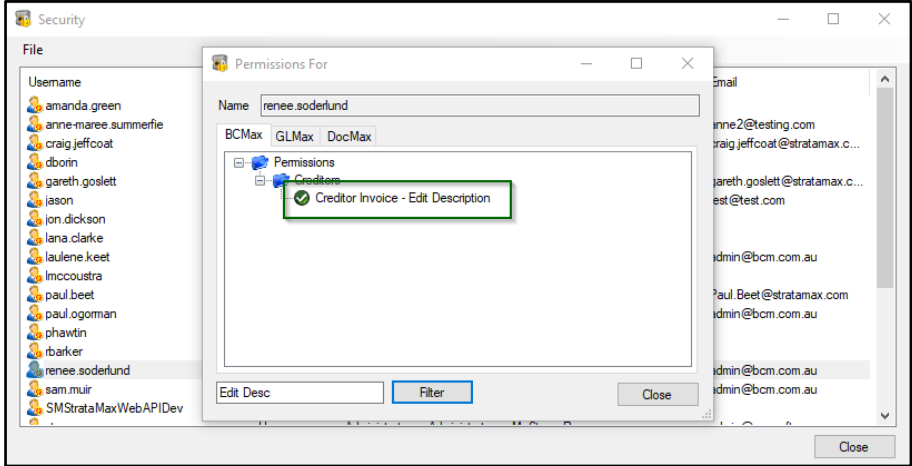
The Roll Plan Report has been reinstated and is now available under Roll/Reports. This report, when exporting to Excel, will report the following fields:

- Building Number
- Lot Number
- Plan Number
- Contribution Entitlement
- Interest Entitlement

	A	B	C	D	E
1	Building Number	Lot Number	Plan Number	Contribution Entitlement	Interest Entitlement
2	107024	1	107024	1.00	0.00
3	107024	2	107024	1.00	0.00
4	107024	3	107024	1.00	0.00
5	107024	4	107024	1.00	0.00
6	107024	5	107024	1.00	0.00
7	107024	6	107024	1.00	0.00
8	107024	7	107024	1.00	0.00
9	107024	8	107024	1.00	0.00
10	107024	9	107024	1.00	0.00
11	107024	10	107024	1.00	0.00
12	107024	11	107024	1.00	0.00
13	107024	12	107024	1.00	0.00
14	107024	13	107024	1.00	0.00
15	107024	14	107024	1.00	0.00
16	107024	15	107024	1.00	0.00
17	107024	16	107024	1.00	0.00
18	107024	17	107024	1.00	0.00
19	107024	18	107024	1.00	0.00
20	107024	19	107024	1.00	0.00
21	107024	20	107024	1.00	0.00
22	107024	21	107024	1.00	0.00
23	107024	22	107024	1.00	0.00
24	107024	23	107024	1.00	0.00
25	107024	24	107024	1.00	0.00
26	107024	25	107024	1.00	0.00
27	107024	26	107024	1.00	0.00
28	107024	27	107024	1.00	0.00
29	107024	28	107024	1.00	0.00
30	107024	29	107024	1.00	0.00

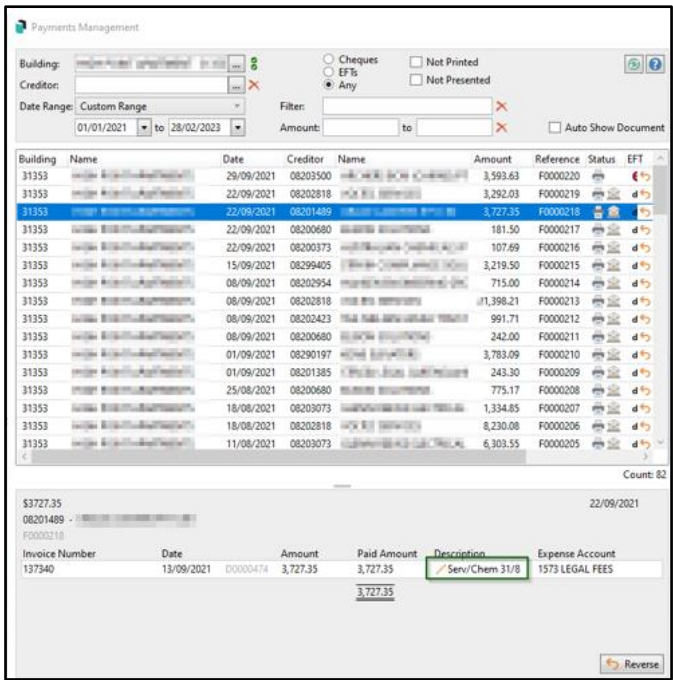
3. New Security Option – Creditor Invoices

New security ‘Creditor Invoices-Edit Description’ option has been added to security. This new security setting will allow users that are denied permissions to Creditor Invoices to change the description of any creditor invoices.

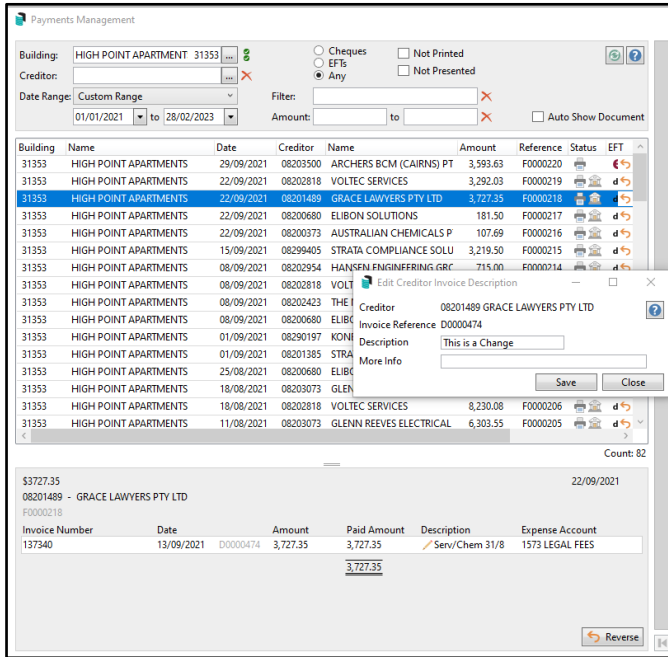


If the users are set to allow for ‘Creditor Invoices – Edit Description’ the following steps need to be followed to change descriptions:

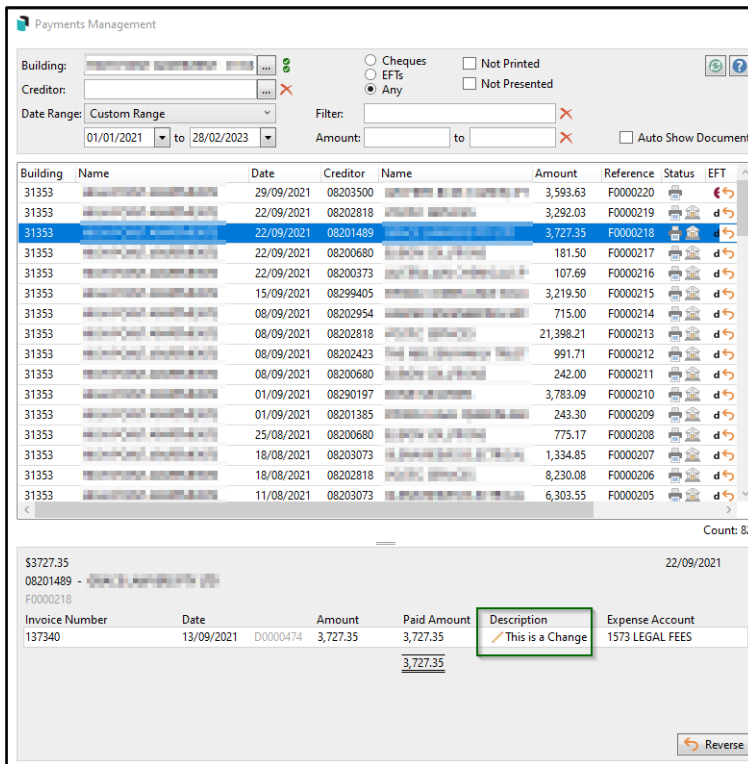
1. Navigate to ‘Payments Management’
2. Select the ‘Creditor Invoice transaction’ for which the description needs to be changed
3. Click on the ‘Pencil’ (edit function)



4. Enter the new Description for the transaction

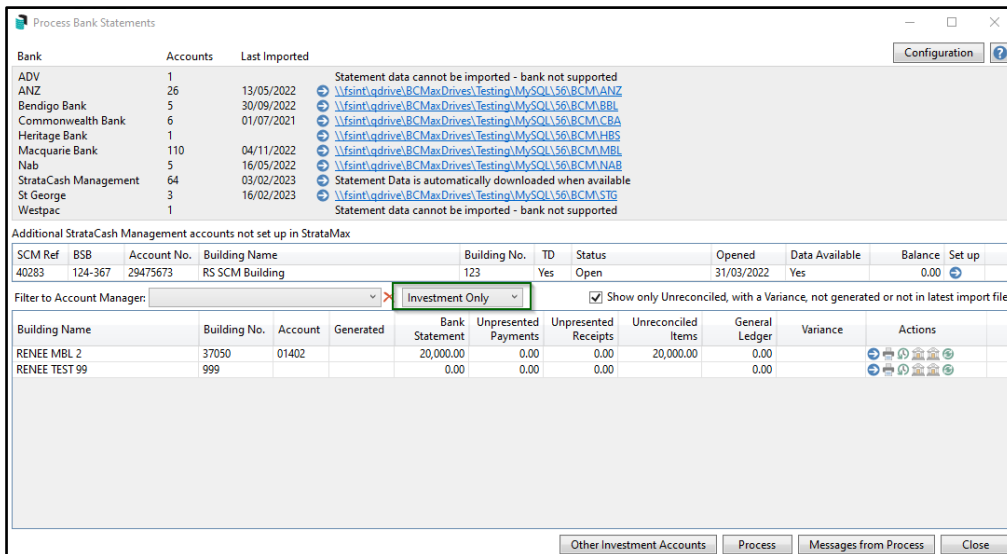
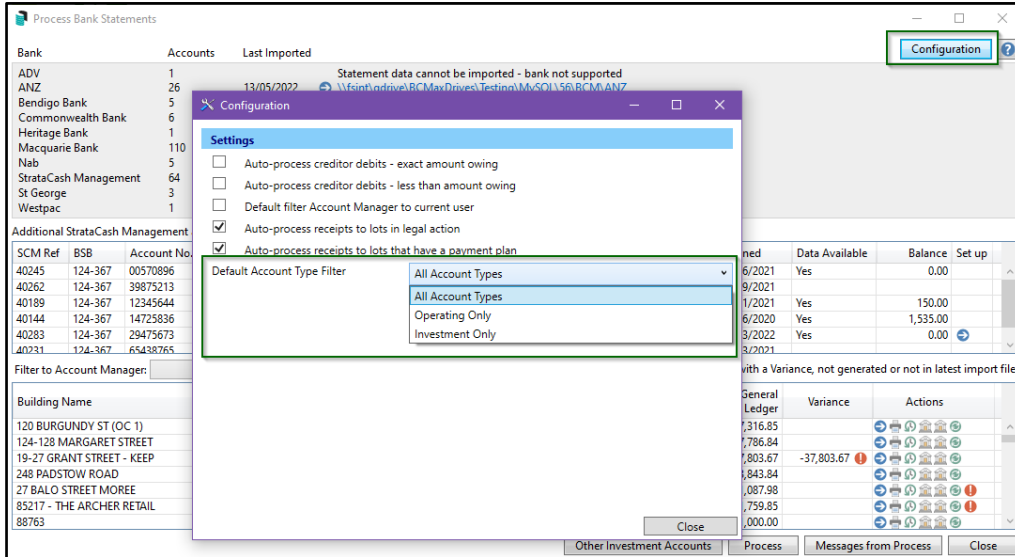


5. The new description will be saved



4. Process Bank Statements – New Configuration

New configuration option 'Default Account Type Filter' has been added to Process Banking Configuration. If the configuration is set to one of the shown types this selected account type, when Process SQL Banking module is opened, will be the default.



Please Note: This is a user setting only.

5. Bank Account Setup–Import unregistered bank accounts

A new import option has been added to Bank Account Setup if there are any bank accounts for banks (SCM already supported).

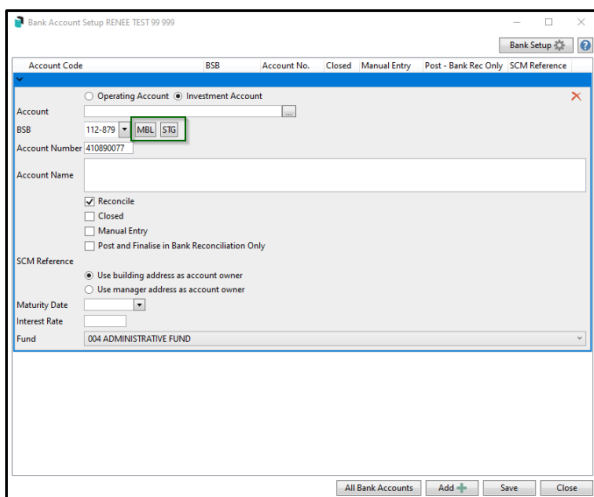
This new option will only appear if the last day's banking is imported and there are unused bank accounts for that day. The bank name should also be copied into the bank account setup if known.

Banks supported are:

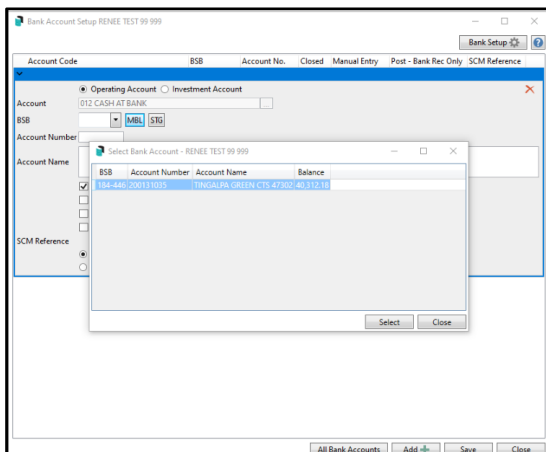
- ANZ
- BBL
- CBA
- HBS
- MBL
- NAB
- STG

The option will appear if there are any available accounts in the Bank Account setup module, follow the below steps:

1. Navigate to 'Bank Account Setup'
2. The new options will appear for all banks that have unallocated bank accounts from the import file



3. Click on the 'option' for your building
4. Select the correct account from the list



5. This will automatically add the bank account details into the Bank Account Setup

Bank Account Setup RENEE TEST 99 999

Bank Setup

Account Code	BSB	Account No.	Closed	Manual Entry	Post - Bank Rec Only	SCM Reference
▼						
● Operating Account ○ Investment Account						
Account	012 CASH AT BANK					
BSB	184-446	MBL STG				
Account Number	200131035					
Account Name	CTS 47302					
<input checked="" type="checkbox"/> Reconcile						
<input type="checkbox"/> Closed						
<input type="checkbox"/> Manual Entry						
<input type="checkbox"/> Post and Finalise in Bank Reconciliation Only						
SCM Reference						
● Use building address as account owner						
○ Use manager address as account owner						

All Bank Accounts Add + Save Close

6. Click 'Save'
7. The account will be added to the building's setup

What's Better

- Building Info – Meetings display was showing the location of the Last Meeting rather than the Next Meeting. This has now been resolved.
- DEFT Deposit Slip – Various States/Territories postal address for DEFT was incorrect. Addresses have now been made a default based on the state/territory of the building.
- Creditor Invoices – Invoice hub schema will now store the timestamp correctly as time of upload
- Owner Notes – When a large note was being saved the system was crashing when the user clicked on save multiple times. This has now been resolved in the following areas:
 - Office Bearer Notes
 - Owner Notes / Roll
 - Building Notes
- DataSync Public /lot/balances – to use normalised lot number instead of leading zeros
- Re-subdivide / Reallocate – The Resub Plan/Resubdivision date was defaulting to the Date of Registration of the Plan. This has been enhanced to not default a date and left blank but be mandatory field. A message to check the CSM document has also been added.
- Process Bank Statements – performance enhancements for larger drives
- Meeting Hub - New merge field 'Committee Nomination is Withdrawn' which reflects whether a committee nomination for a position is withdrawn.
- Meeting Hub - A new filter to the existing 'Committee Nomination List' merge field has also been added to allow the user to decide whether to include or exclude withdrawn nominations. This defaults to "Exclude Withdrawn" to ensure that merge fields on existing templates replicate current functionality.
- Creditors Aged Balance – The report has now been enabled for GLMax. Enhancements have also been made to the security setting by changing the wording of the security permission from 'Creditors Balances' to 'Creditors Aged Balance'
- Bank Reconciliation Report – When exporting to Excel the Account Manager was not reporting, this has now been added when exporting to excel
- DEFT Deposit Slip - Various States/Territories Postal Address needed Default Addresses