Release Notes – Version 5.6.80

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

StrataMax StrataCash TRATAPAY

What's New....3
1. Search Screen Enhancements – Saved Search Overview....3
1.1 Save Group and Global Saved Search Security Setting....3
1.2 Set up and Save a Search....4
2. Funds Management Report – Update Legislation wording....6
3. Bank Account Setup – New Fields....6
3.1 Bank Account Setup....6
3.2 Dashboard – Maturing Investment Accounts....7
What's Better....8

What's New

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1. Search Screen Enhancements – Saved Search Overview

General purpose search screens have been enhanced to offer the ability to create Saved Searches based on the set search criteria. Searches can be created and saved in areas such as Search Bank Accounts, Communications Search Logs, and the standard Log Viewer.

Saved Searches can also be set as the Default Search for the selected module. For example, a search for Search Bank Accounts can be saved to look for Manual Accounts only and be set as Default search when the All Bank Accounts search is accessed.

Searches can be saved for current user only, global (accessible to all users) or available to a specific user group only.

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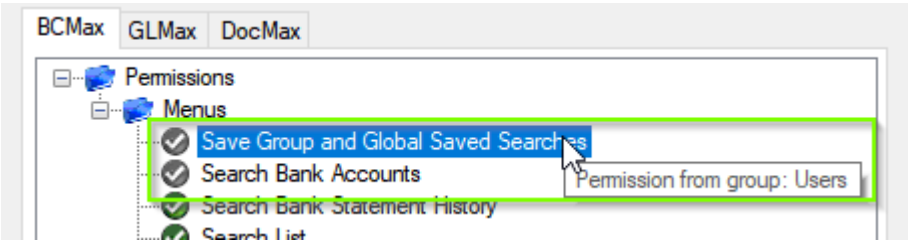
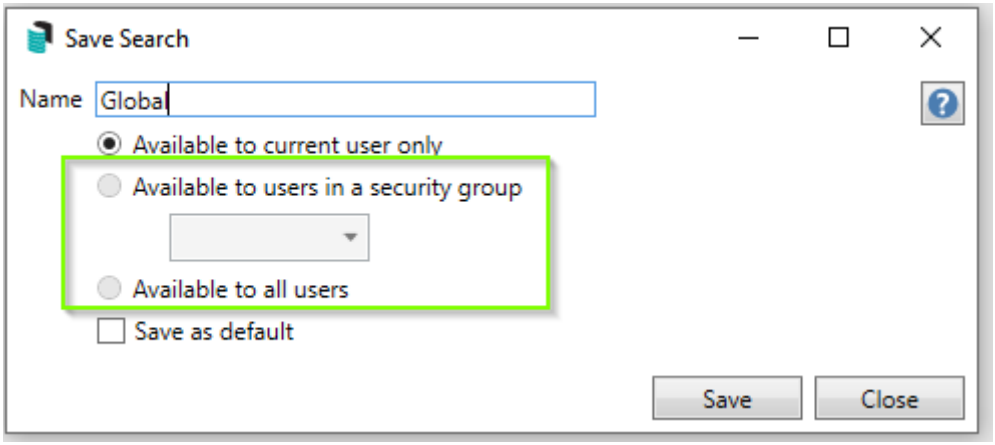
1.1 Save Group and Global Saved Search Security Setting

A new security permission has been added to allow or deny individual users or User Groups access to create or delete a search. The setting is called 'Save Group and Saved Searches' and can be accessed by navigating to Security Setup, type 'Search' into the filter and click Filter to see the setting. Set to Allow, Deny or Inherit.



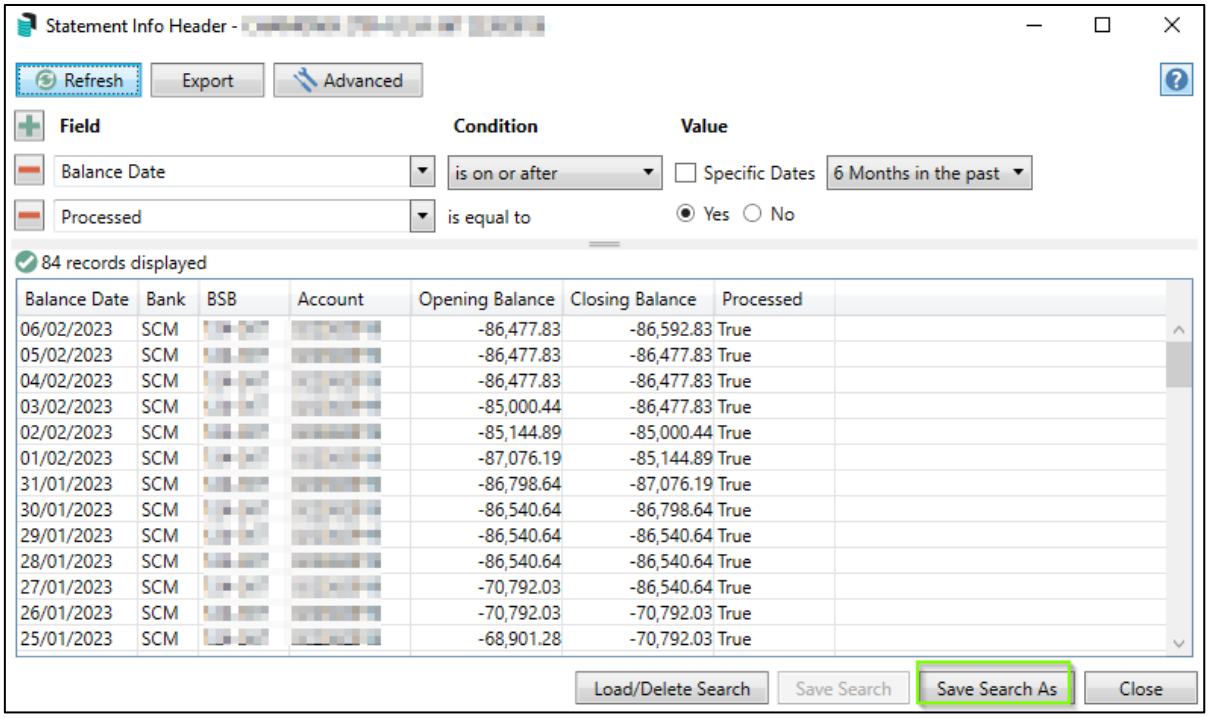
If set to Deny, access to save a search for all users or a user group will be disabled.



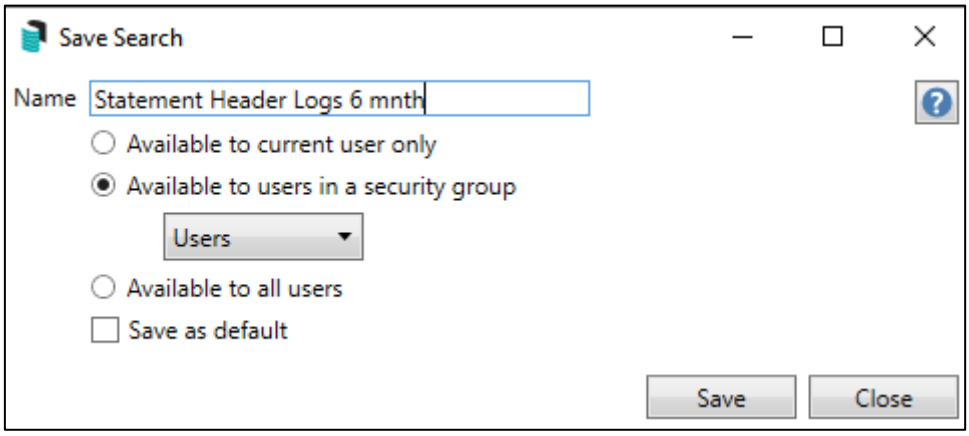
1.2 Set up and Save a Search

To set up a search, open specific search module you are creating the saved search for. For example, to create a saved search based on Banking Statement Info Details, click into the Statement Details search.

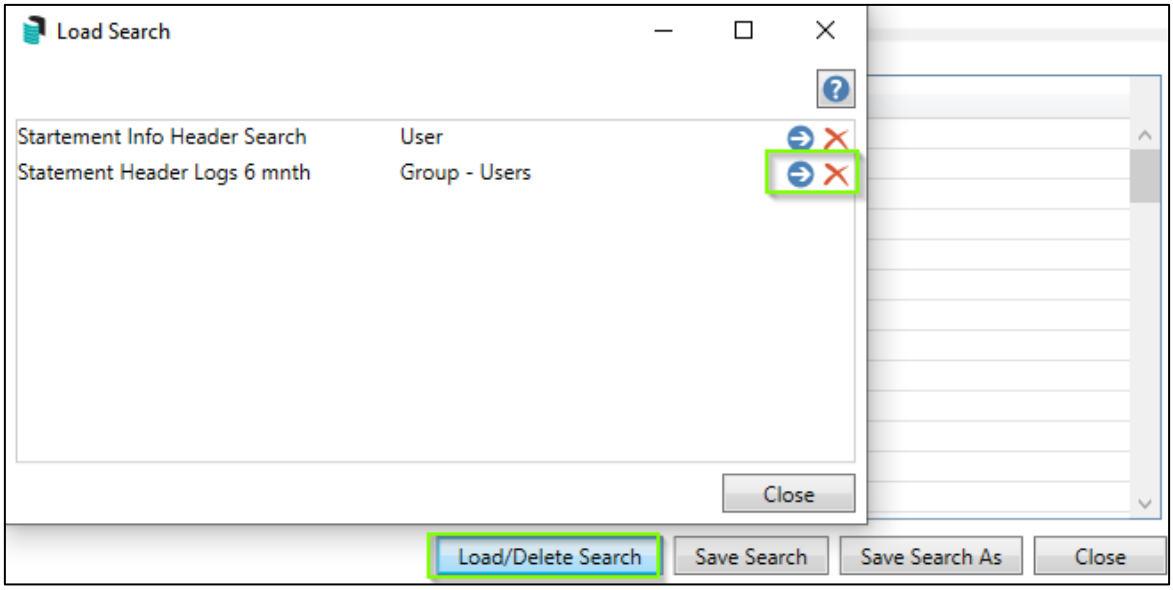
Once in the appropriate search area, set the required parameters for the saved search. Click Save Search As



Add a name for the search and set who the search will be available to. The search can be set as Default and will be presented initially when that area of the search is opened.



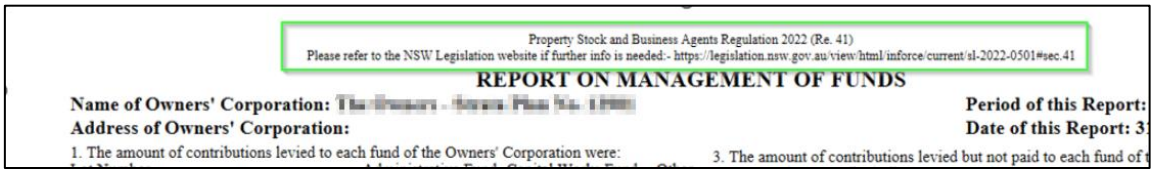
Once created, click 'Load / Delete search to see saved searches. Click the arrow to load or the 'X' to delete.



Please Note: To edit a Saved Search, load it, change the search settings, and then press the 'Save Search' button.

2. Funds Management Report – Update Legislation wording

The Funds Management Report title on the top of each page has been updated in line with Legislation.

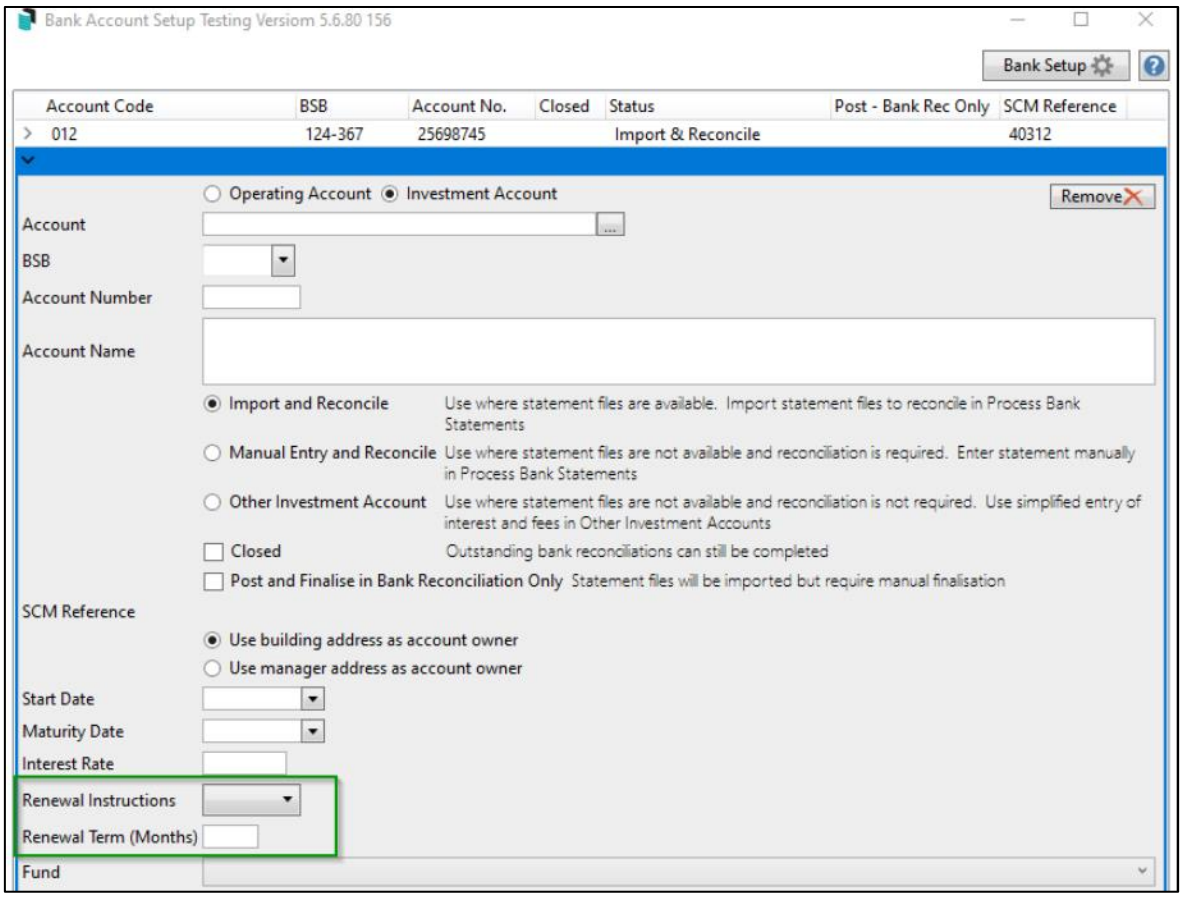


3. Bank Account Setup – New Fields

3.1 Bank Account Setup

Enhancements have been added to Bank Account Setup adding three extra account level fields to manage Term Deposit account functions:

- Start Date
- Term Period (in months)
- Current/Pending Maturing instruction



3.2 Dashboard – Maturing Investment Accounts

The two new fields in Bank Account setup have also been added to the Maturing Investment Accounts dashboard.

- Renewal Instruction
- Renewal Term (months)

What's Better

- Bank Reconciliation - Bank Reconciliation - When "NO GST" is tagged the building will not include GST on transaction.
- Report Sets - Creditors Aged Balance attempts to run for last year but cannot support backdating.
  Please note - If Old Year is selected it will only produce the totals for the Current Year.
- Receipt Entry – Returned Cheque option is now only available from Bank Reconciliation, no longer available in Receipt Entry.
- Global Reports/Committee Extract - Send Status Reports not including Status Reports/Set Officer Type has now been resolved.
  Please Note - Any Office Bearer flagged as 'Never Send' will ALWAYS have 'N' in Status Reports regardless of Set Office Types.
- An error when entering Opening Balances without a Bank Account Setup the system has now been resolved
- Process Bank Statements – Incorrect Class call in Unreconciled deposit was unable to save successfully, this has now been resolved
- BPAY Payments - When processing a payment for the same creditor/same day/ multiple payments such as multiple BPAYs with different CRNs. The system was not able to auto reconcile when the payment is received, nor will the user be able to manually reconcile. This has now been corrected.
- Changes have been made to Bank Reconciliation module; the system will no longer auto select an account other than that of the current building selected. If the building selected has no bank account, the Bank Reconciliation module will now present the following, prompting the user to go set up a bank account or select a different building from the drop down