Release Notes – Version 5.6.82

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

1.   New Searches are now available

1.1   Building Info – Account Manager changes

Enhancements have been made to report all changes made in Building Info. All changes will now be available under the Building Information History.

To view the changes, follow the steps below:

1.   Navigate to 'Search Building Info History'
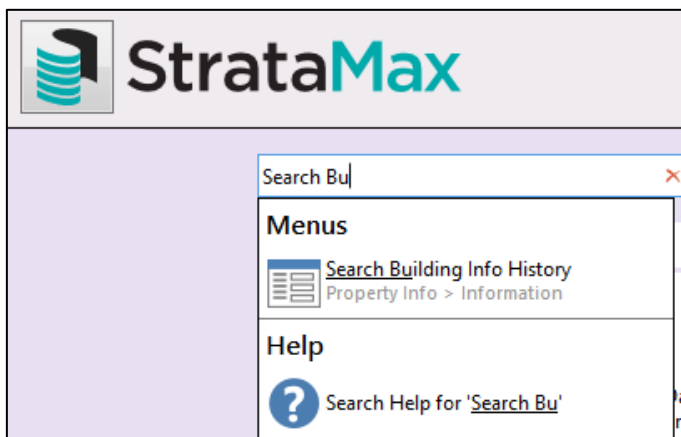
2.   Click on + Field
3.   Select 'Account Manager' as an example (if you want a specific Account Manager select it from the drop-down available)
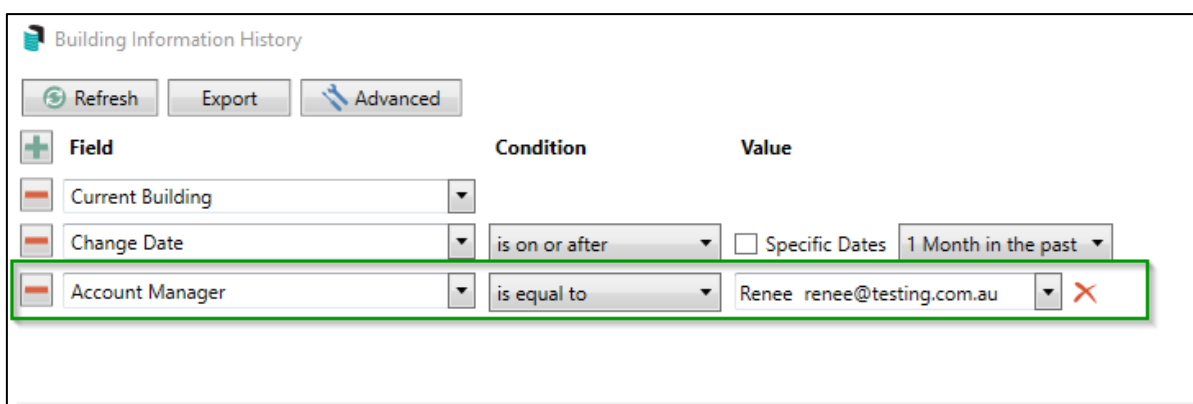
4.   The Account Manager changes will appear in the display of records from the search criteria selected
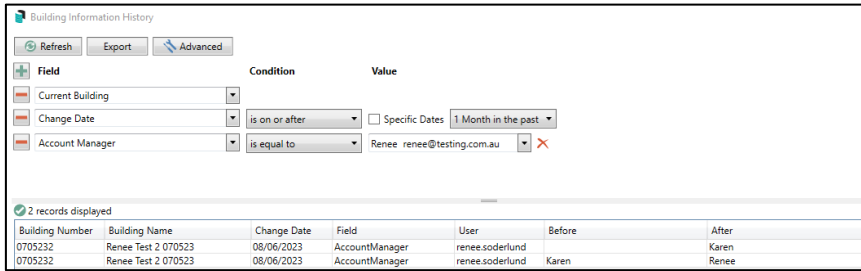
1.2 Search Work Orders

Users can now search for all work orders using the new 'Search Work Orders'

To access the new search, follow the below steps:

1. Navigate to Search Field
2. Type in 'Search Work Orders'
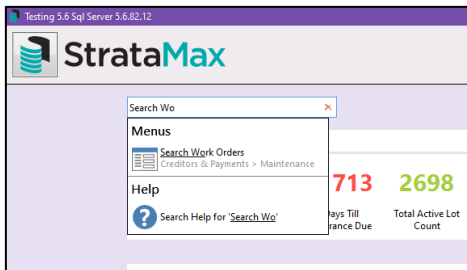
3. The Work Order search will open defaulting to 'current building'
4. Change the search criteria you wish to search (status filters are available to match the work order statuses)
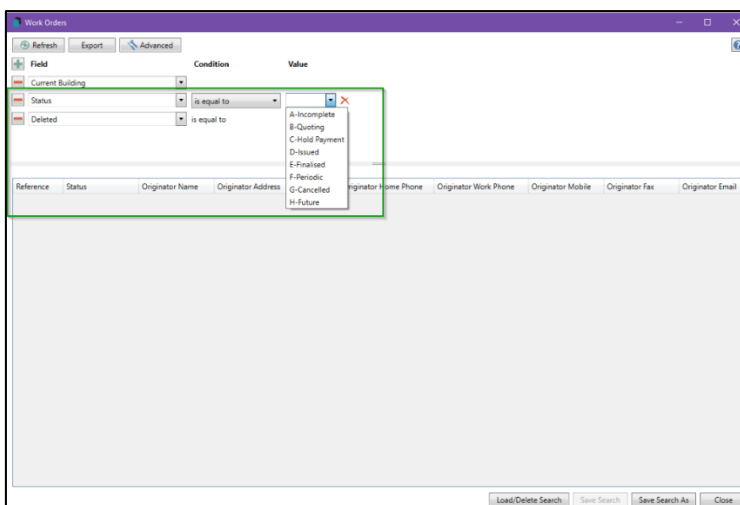
5. System will return the results based on the search criteria.

1.2.1 Search Work Orders Security

Security is also available to set permissions for 'Search Work Orders'

1.3 Search Quotes

Search Quotes is now available to easily search for work order quotes that have been issued from TaskMax:

To access the new search, follow the below steps:

1. Navigate to the Search Field
2. Type in 'Search Quotes'

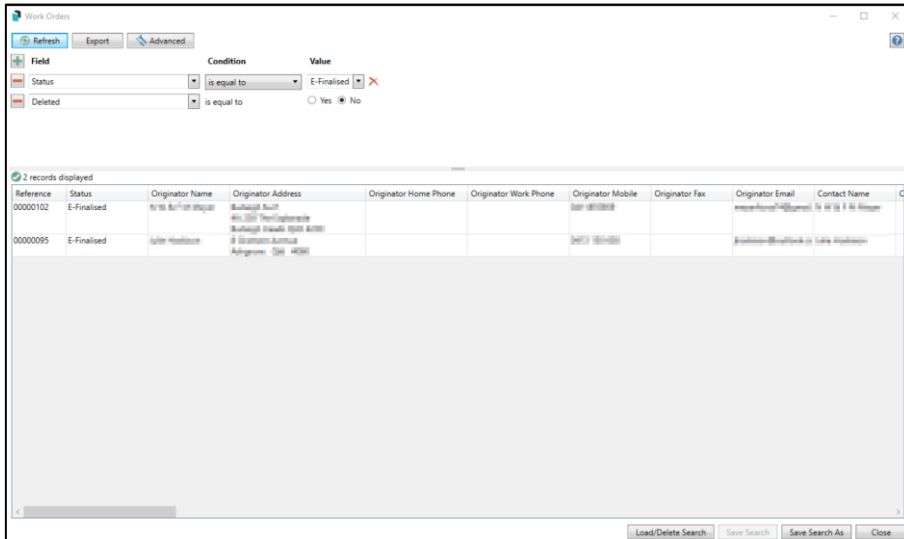3. The Quote search will open defaulting to 'current building'
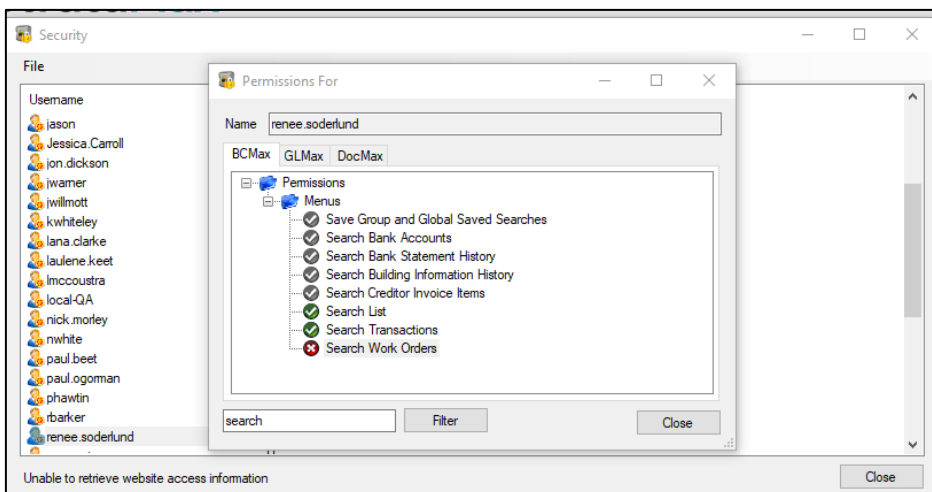4. Change the search criteria you wish to search (status filters are available to match the quote statuses in TaskMax)
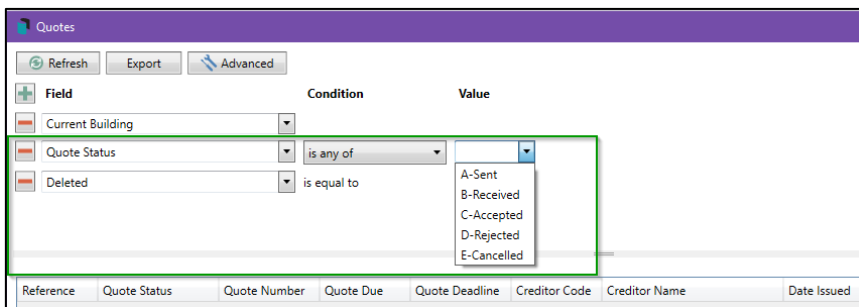
5. System will return the results based on the search criteria.

1.3.1 Search Quote Security

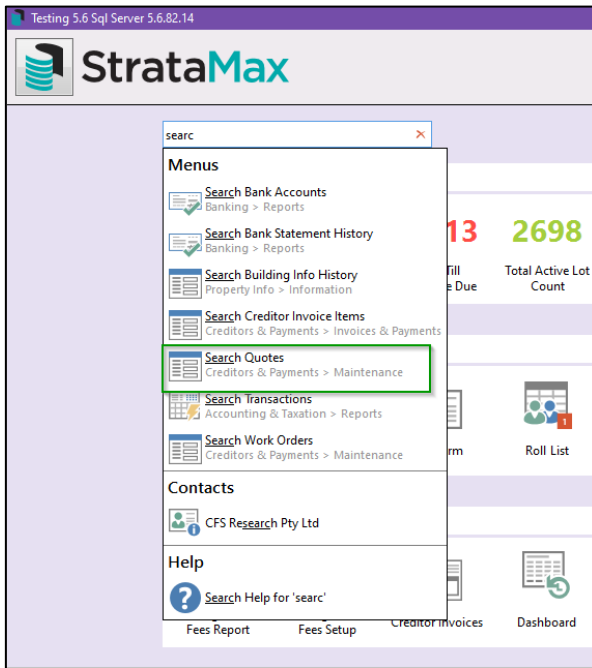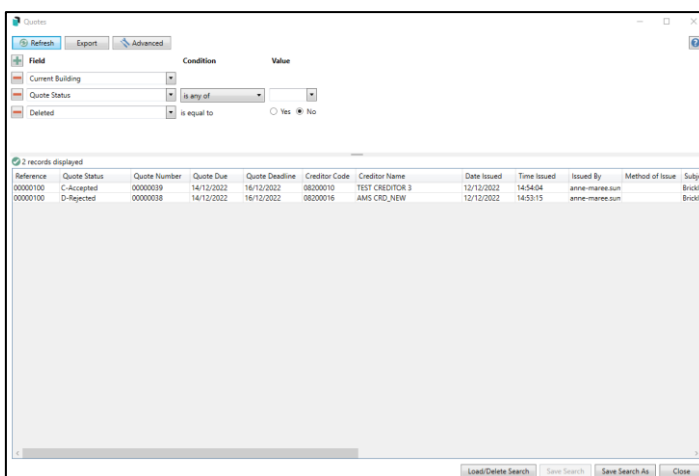Security is also available to set permissions for 'Search Quotes'

## 2.   Merge Letters and Report Distribution Enhancement Overview

The new Report Distribution interface will include enhanced functionality when delivering roll reports, merging letters, and grouping building reports into a set. This new screen provides a clear visual of what is included for distribution and how it will be distributed.

This screen will be available via the various roll report menus, including merge letters, offering direct distribution for the selected recipients.

Some of the features for merge letters and reports include:

- Complete rewrite to significantly improve the speed of the merging process.
- Merge letters can be sent to recipients of multiple buildings at once, this being useful for processes such as sending nomination requests, general correspondence, etc.
- A combination of merge letters, reports, and attachments from DocMax, can be collated for distribution. These can be saved for future use as a report set.
- The ability to allow consolidated emails to be sent to a contact; if a contact owns multiple lots for example a single email can be sent containing the merge letters, reports, and attachments for the various lots.
- The new Report Distribution screen will confirm how the information from StrataMax is being distributed before sending.
- The ability to allow Bing to distribute by post & email.
- Filters will be available for VIC multi OC's (account groups), owner-occupied lots, intro letters not sent, etc.
- Ability to automatically store reports to DocMax, linking to specific lot accounts where applicable.

- Change of Ownership or Change of Details will each have a report set created based on currently configured reports. Additional reports and attachments can then be added.
- Selected roll report templates will report individual contacts.
- Ability to send SMS to multiple buildings (when SMS usage is configured).
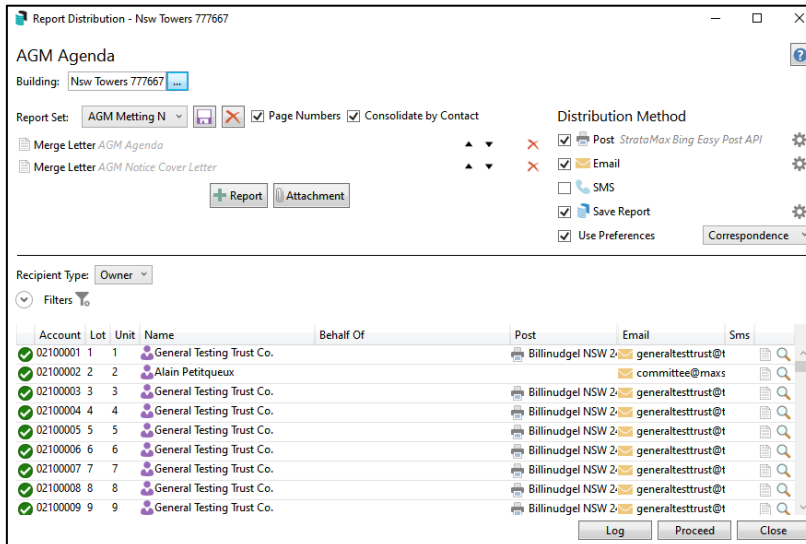
Other Features

- Contact cards can contain multiple email addresses which can now be set for different purposes. For example, a real estate agent may use one email address for levy notices and another email for correspondence. Another example is having a specific email address used for Invoice Hub notifications, which can be useful when there is a generic email used. (See Section 5 for more information)
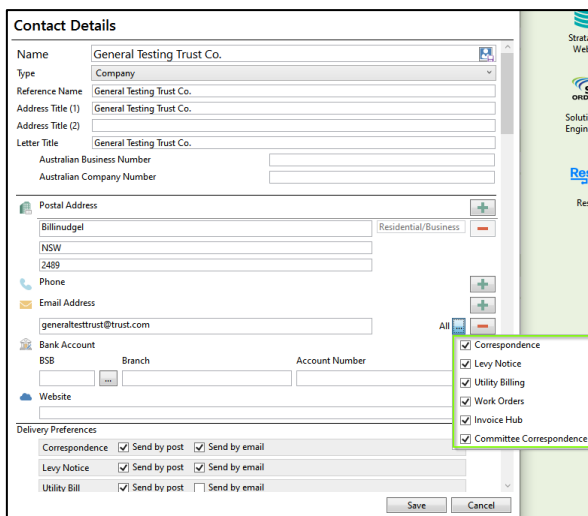
- Use Bing for Email - Emails from BCMax can now be sent to Bing for distribution. (See Section 6 for more information)

3. Report Distribution Interface

3.1 Reports that will open Report Distribution Interface

Roll Reports will be the first set of reports to utilise the new Report Distribution interface. Reports that will open the new screen are:

- Roll List
- Roll Update Advice
- Roll Entry Report
- Roll Form
- Roll Confirmation Details
- Merge Letters

Click the menu item icon for any of these reports and the new interface will be presented.

3.2 Report Distribution Interface Common Features

The following features are common to all reports in the Report Distribution screen.

3.2.1 Report set up window

This screen will default to the selected report. For example, if Roll Confirmation Details Report was selected, the selected report will default to Roll Confirmation Details.

This window includes the following information and settings:

1. Report Name
2. Selected Building - Displays current building. Click to tag multiple buildings
3. The selected Report Set if one has been added. (See Section 2.4 for more information)
4. Page Number Setting - tick to add page numbers to your report
5. Consolidate by Contact option - tick to remove duplicate notices to contacts with the same email address
6. The name of the selected template
7. Up and Down arrows to change the order reports are produced in, if multiple reports are set

8. Configuration cog - Click to set the required report template and modify report configuration options (these are the configuration options already available for each report)
9. Add another report if required (See Section 7 - Additional Reports Table)
10. Add an internal or external document attachment if required
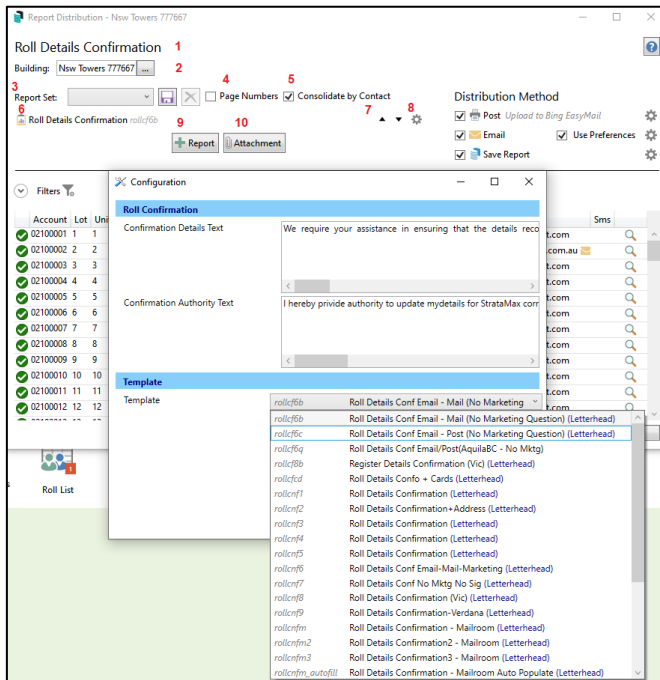
Relevant Reports will also include an Accounts Selector which will produce reports for selected accounts only and Account Group buildings will include an Account Group Selector which will filter recipients and data by the selected Account Group.
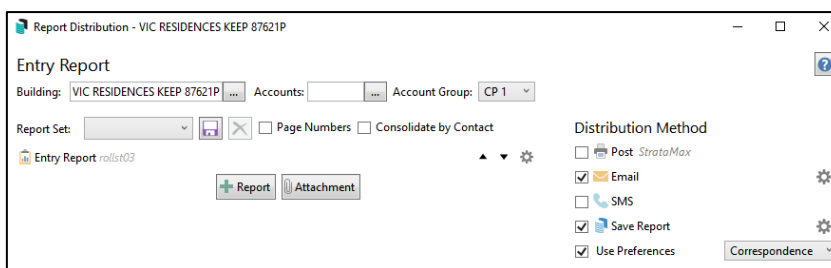
**Please Note:** Page Number format is set by default and cannot be configured at this time.

3.2.2 Distribution Method

Distribution preferences can be configured for Post, Email, and DocMax document storage based on pre-configured roll preferences and profile options.

Post

Tick **Post** to include contacts where the contact preference is Post. Click the configuration cog to set the required printer. The printer/print method will be displayed once set.
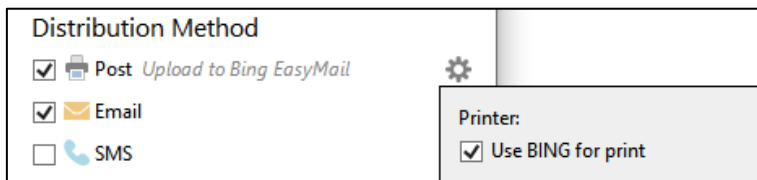
Please Note: 'Use BING for Post' must be ticked to set the 'StrataMax Bing Easy Post API' printer and upload to BING Easy Mail. The 'Mailroom' printer will not be supported for this process.

Email

Tick **Email** to include contacts where the contact preference is 'Email.'

Tick use preferences to honour configuration options. Tick the configuration cog to see the following settings:

- Use Bing for Email - tick to distribute emails through BING. (See Section 6)
- Modify the email template for the set report – Note the security permission.
- Reports – Edit Email Templates is required. (See Section 7.2.)
- Review the sender's email address - This is automatically populated from the user profile security setup.
- Set the Email preference address. (See Section 5)
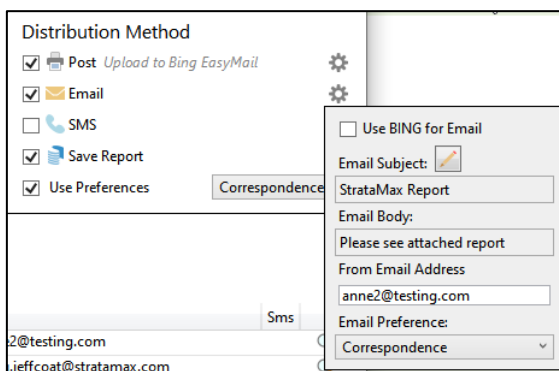
Where:

1. The 'Post' checkbox = checked and the 'Email' checkbox = unchecked:
   a. The 'Recipients' grid will only display contact information in the 'Post' column, i.e., the 'Email' column will be empty and the records in the grid will be filtered to display only owners that have a postal address specified.
   b. If the 'Use Preferences' checkbox is also checked – The records in the grid will be filtered even further to only display, contact records where the 'Correspondence' contact preference = 'Send by Post.'
   c. If the 'Use Preferences' checkbox is unchecked – The records in the grid will NOT be filtered any further.
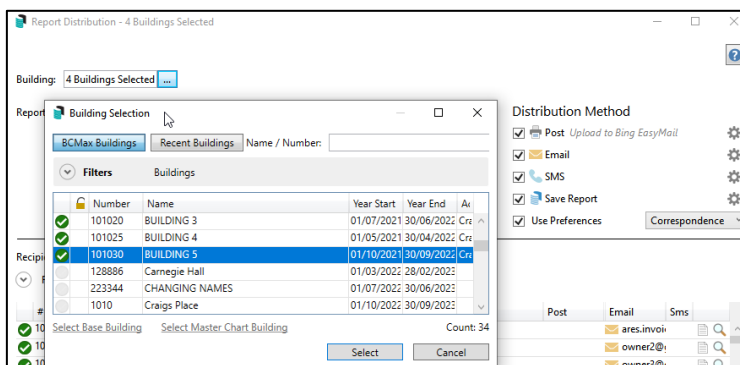
2. The 'Post' checkbox = unchecked and the 'Email' checkbox = checked:
   a. The 'Recipients' grid will only display contact information in the 'Email' column, i.e., the 'Post' column will be empty.
   b. The records in the grid will be filtered to display only the owners that have an email address specified on the Roll and the correspondence type selected for that email address, on the Roll, is the same as the 'Email Preference' type specified on the Email' parameters.
   c. If the 'Use Preferences' checkbox is also checked – The records in the grid will be filtered even further to only display, contact records where the 'Correspondence' contact preference = 'Send by Email.'
   d. If the 'Use Preferences' checkbox is unchecked – The records in the grid will NOT be filtered any further.

3. BOTH the 'Post' checkbox and the 'Email' checkbox = checked and:
   a. The 'Use Preferences' checkbox is unchecked – The 'Recipients' grid will display:
      i. A record for all owners that have either a postal or an email address specified on Roll, irrespective of the type of correspondence the user selected to receive to the specified email address.
      ii. Contact information in both the 'Post' and 'Email' columns if it is available.
   b. The 'Use Preferences' checkbox is also checked:
      i. Where the 'Delivery Preference' for 'Correspondence' on the Roll is set to:
         1. 'Send by Post' only – The 'Recipients' grid:
            a. Will be filtered to display all owners that have a postal address specified on the Roll.
            b. Will display the postal address in the 'Post' column.
         2. 'Send by email' only - The 'Recipients' grid:
            a. Will be filtered to display all owners that have an email address specified on the roll and the correspondence type selected for that email address, on the Roll, is the

same as the 'Email Preference' type specified on the Email' parameters.

        b. Will display the email address in the 'Email' column.

3. Both 'Send by Post' and 'Send by email' – The 'Recipients' grid:

        a. Will be filtered to display all owners that have a postal address, or an email address specified on the Roll, and the correspondence type selected for that email address, on the Roll, is the same as the 'Email Preference' type specified on the Email' parameters.

        b. Will display the postal address in the 'Post' column and will display the email address in the 'Email' column only if the correspondence type selected for that email address, on the Roll, is the same as the 'Email Preference' type specified on the Email' parameters.

Save Report

Tick Save Report to add the report to DocMax. If a profile is selected, the reports/documents will be filed using the parameters of the selected profile. Refer to DocMax profiles for more information.

Please Note: If the Consolidate by Contact option is set, the report will be saved with the first lot account details in DocMax.

SMS is configured for use through Communications

If your organisation is set up to use SMS through the Communications module, an additional setting for SMS will be available in the Distribution Method window.

Tick the setting to send SMS messages to one or multiple buildings. Click the configuration cog to add the template text you would like to send.

Send to multiple buildings by clicking the Building Selector and tagging the buildings.

3.2.3 Recipient Type window

The recipient type window will show the recipients based on configured filters and settings. Click the Recipient Type drop-down list to review/change the type of contact. For example, selecting Letting Agent will display a list of Agents for the building.

Recipient Types:

- Owners
- Other Debtors (From Debtors Maintenance List)
- Letting Agent
- Tenant
- Creditors (From Creditor Maintenance List)
- Office Bearer
- Applicant
- Resident (An owner that has the 'is owner occupied' set, or tenant)
- Internal Users (Account Managers, etc)
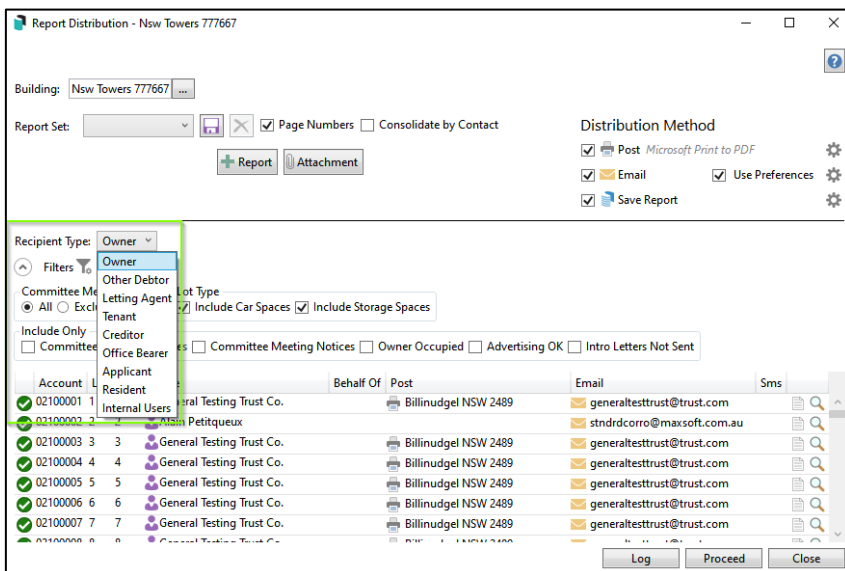
In subgroup buildings, ensure 'Other Debtor' is set to see the debtors list.

Once the recipient type is set, other filters can be added to further refine recipient types. Click the arrow beside 'Filter' to expand the filter options.

Filter parameters are as below:

Committee Member

- All – Includes all Committee Members and owners.
- Exclude – Excludes Committee members.
- Only – Only includes Committee Members.

Lot Type

- Include Car Spaces – Includes car space lot types.
- Include Storage Spaces – Includes storage space lot types.

Duplicate

- Copy to Owner – Sends a copy of correspondence to the owner where Agent is set to receive Correspondence by email.

Include Only

- Committee Meeting Minutes – Removes contacts who have elected to not receive Committee Meeting Minutes in the Roll if ticked.
- Committee Meeting Notices – Removes contacts who have elected to not receive Committee Meeting Notices in the Roll if ticked.
- Owner Occupied – Only includes lots where Owner Occupied is set in the roll.
- Advertising OK – Removes lots where Advertising is OK is not ticked in the Roll.
- Intro Letters Not Sent – Only includes lots where the Welcome Letter has not been printed.

Columns available for display

Columns available for display in the recipient list are:

- Account – Shows Account Code
- Lot – Shows Lot Number
- Unit – Shows Unit Number
- Name – Shows Full name of the recipient
- Behalf Of – Shows the Lot Owner name if the recipient is an Agent or Other, e.g., Nominee
- Post – Shows postal address report will be sent to
- Email – Shows email address report will be emailed to
- SMS – Will show mobile phone number if SMS is configured

In the recipient list window, click the top of the column to change the sort order. For example, click the Account heading to change the sort order to descending order.
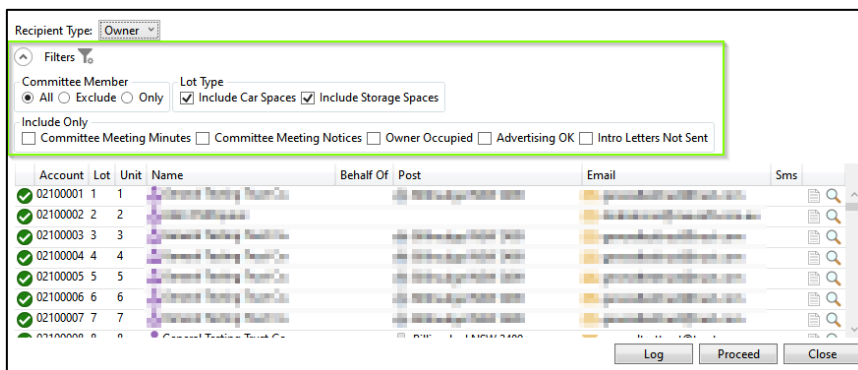
Please Note: This screen will default to the most appropriate recipient type for the selected report, e.g., the Plan Report will default to Internal Users.

Some report screens will not present a recipient-type list as it is not relevant to certain reports, e.g., Roll Details confirmation reports are only sent to owners so only owner-type recipients will be presented.

Proceed

When reports and recipients have been configured, click Proceed to progress to the Report Publish Screen. (See Section 2.3)

Log

Click the 'Log' button to review the report/documents that have been distributed. This can be filtered or refreshed as per regular BCMax logs.
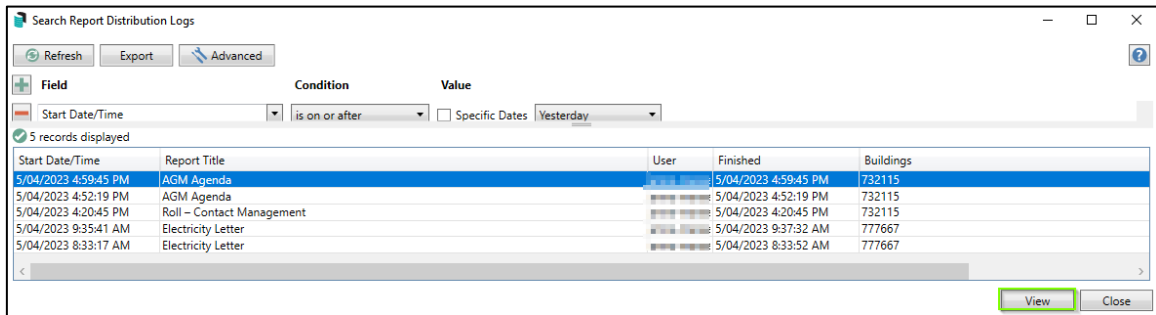
To see the report that was sent, highlight the record, and click 'View.' The document will open in Preview mode.
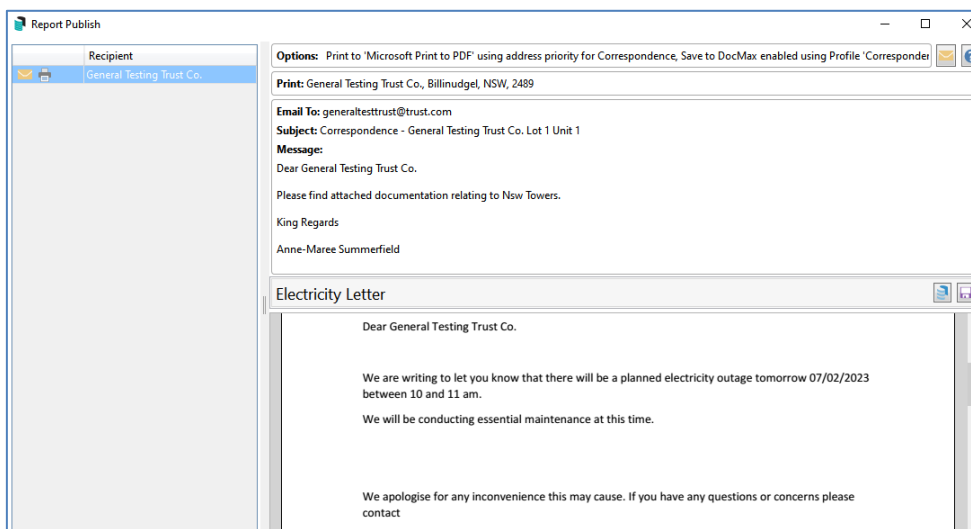
## 3.3   Report Publish Screen Common Features

The Report Publish Screen will show all the recipients based on:

- the filter parameters,
- how and where the reports/ documents will be distributed,
- show a preview of the document, and
- provide Save and Save to DocMax options.

OR:

The Report Publish Screen will show all the recipients based on the filter parameters and distribution details, i.e., how, and where the reports will be distributed.

It also shows a preview of the document and provides the option to Save or Save to DocMax.
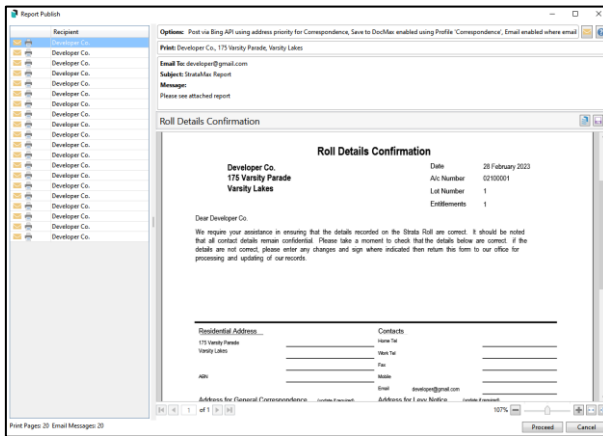
3.3.1 Recipient Info Sidebar

The Report Publish Screen Sidebar on the left shows all selected recipients and an icon to represent the selected delivery method. Use the slider to expand or reduce the size of the Sidebar as required.
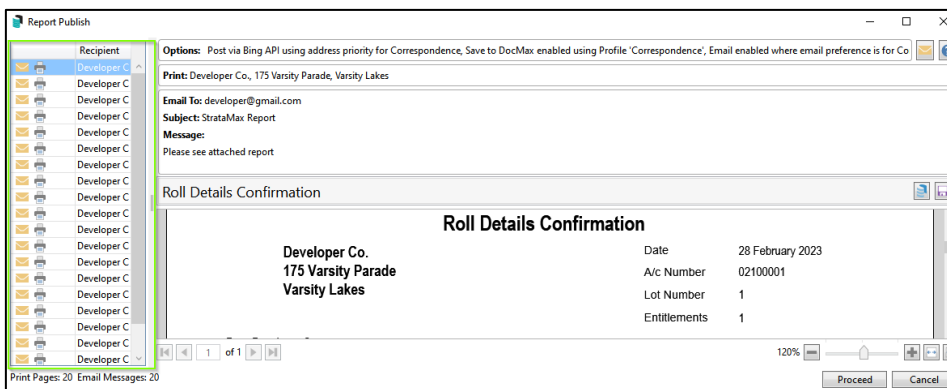

3.3.2 Distribution Options display

The Report Distribution Options Display includes the following:

- Options – The options that were configured for distribution.
- Print – The address the document will be posted to.
- Email – The address that will be used for email.
- Subject – The Email Subject based on the Email Template configured. This will default to 'StrataMax Report' if no template is set.
- Message – The Email body text is based on the Email Template configured. This will default to 'Please see the attached report if no template is set.
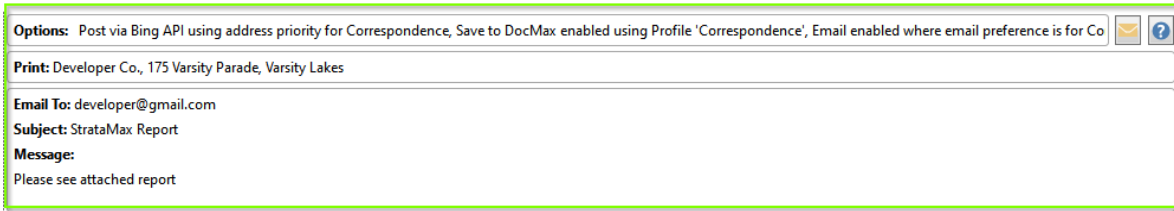
The Email envelope icon will open the Communications Compose screen so it can be re-sent to any recipient.
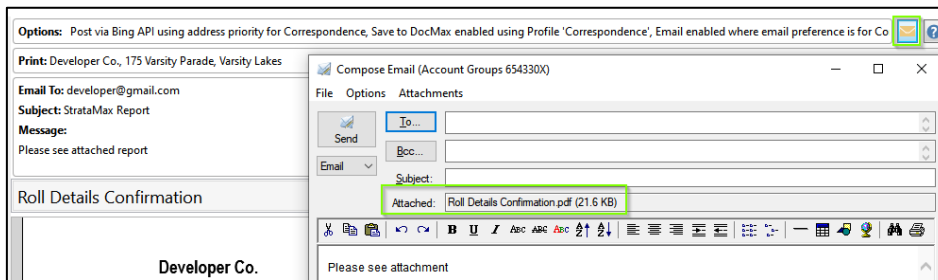
3.3.3 Report Preview Screen

The preview screen shows the name of the report or document and a preview of what will be sent/printed. This screen also allows you to save the document to an external location or DocMax.
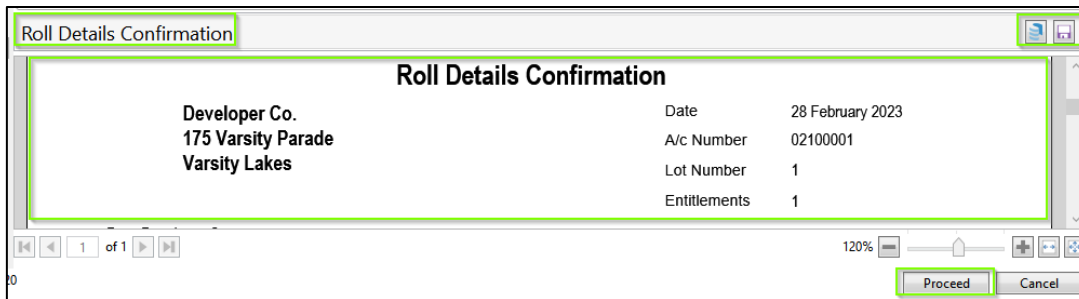
Once you are satisfied all conditions are correct, click Proceed to complete the mailing process. If anything needs to be changed click on Cancel.

If a file has been added as an attachment from DocMax, click the filename in the Summary list to preview.

3.4   Report Sets

Sets of reports relevant to the selected report can be collated and saved as a set. They will be automatically selected with the options and distribution method configured when the report set is selected.

To configure a report set, see the steps below:

1. Select the base report you would like to create a report set under, e.g., Roll Details Confirmation. The base report will be set.
2. Ensure you have the required template and configurations set as required.
3. Click Report to add a report. (See table in Section 7 for accessible BCMax reports)
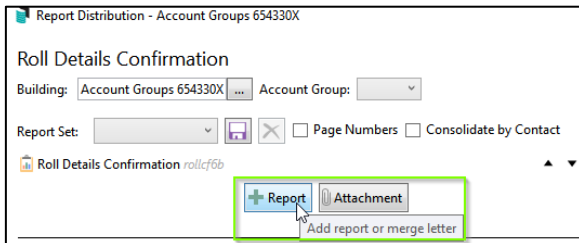
4. Use the filter to search for the report or select it from the list.
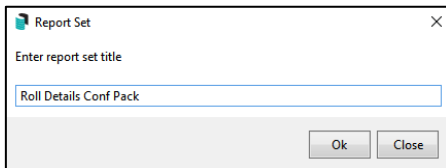5. Highlight the report.
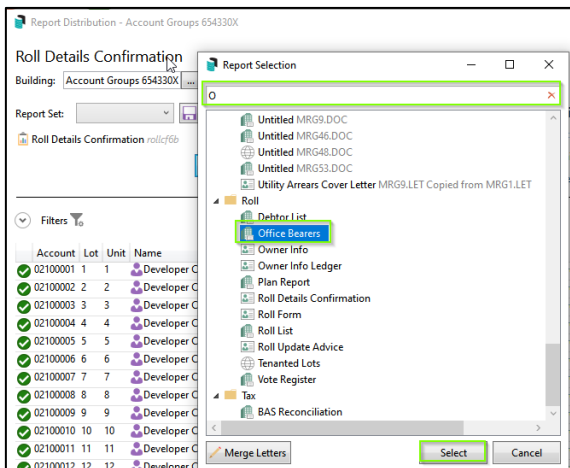
6. Click Select. The report will be added to the Report Distribution screen.
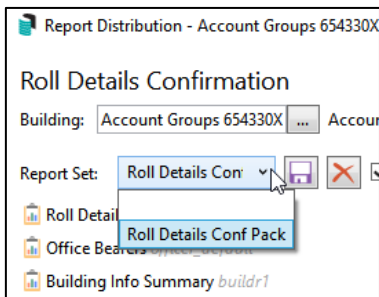7. Click Attachment to add a document from DocMax or an external drive.
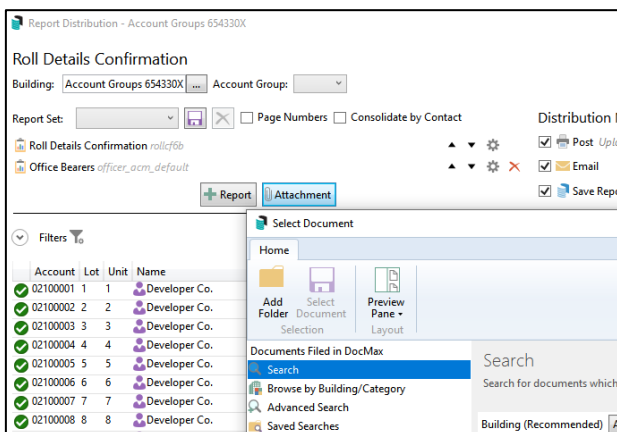
8. Once you have selected and configured all required reports, click the Save button.
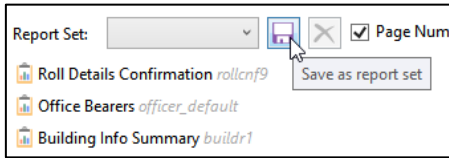
9. Add a name for your report and click OK.

The Report Set will be saved with applied configurations and can be selected from the Report Set selector.


4.   Roll List Report consolidation

Roll List 1 and Roll List 2 have been consolidated into one Roll List Report screen. The Mail Out Report is selectable from this screen.

In the Roll List Report screen, click the configuration cog and select rollst6 - Mail Out Report Roll List 6 and close.
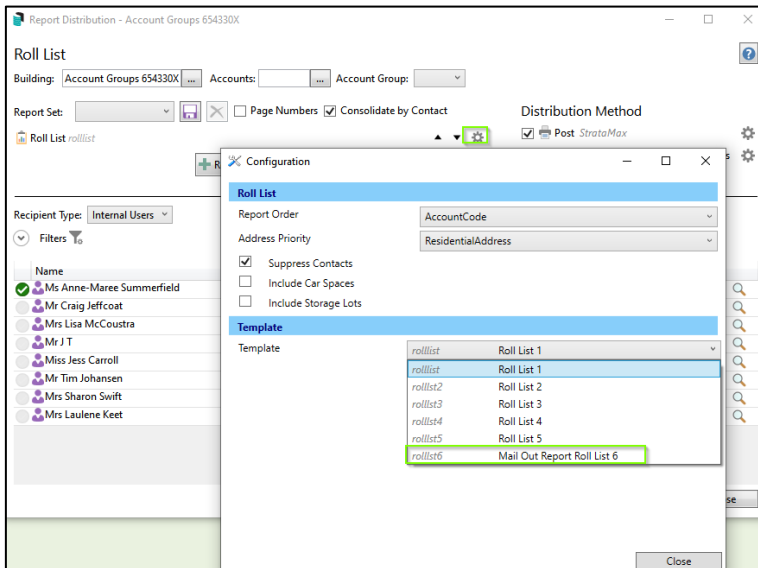
We recommend saving the Mail Out Report as a Report Set to streamline running the report without the need to set different templates.
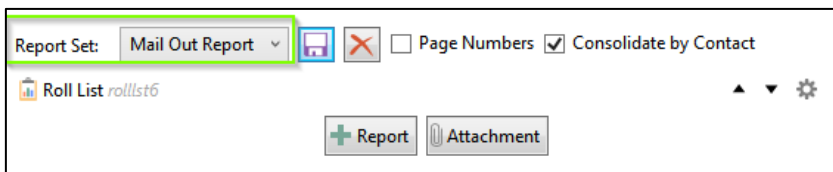
# 5.   Merge Letters using Report Distribution

5.1   Report Selection Screen

The Report Selection Screen will open when Merge Letters is clicked and opened. Click into the filter and start typing to search for the required letter, highlight the letter and click Select to add the letter to Report Distribution.
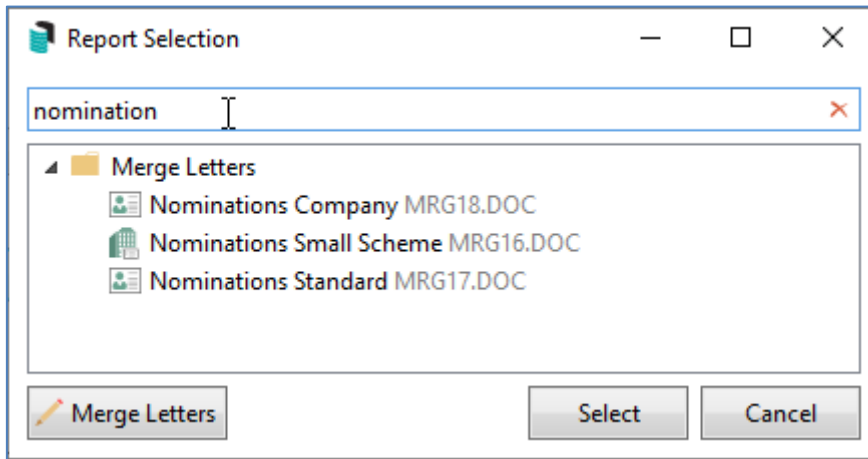
Click cancel on this screen to return to the Report Distribution screen to select a Report Set.

Alternatively, click Merge Letters to open the Merge Letter List screen to create a new letter or edit an existing one. Multiple letters can be added and can be used for a Report Set. Click Report to add another Report or Letter as required.
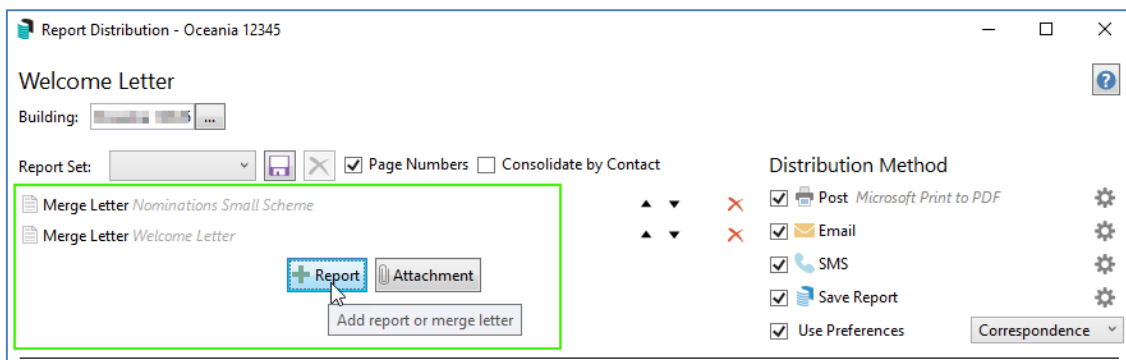
### Merge Letter Recipient window - Merge and Edit

The Merge Letter Recipient window includes options to Merge and Edit a Letter for a specific Lot and preview the letter. Click the Merge and Edit icon to open and edit and the magnifying glass to open a preview.
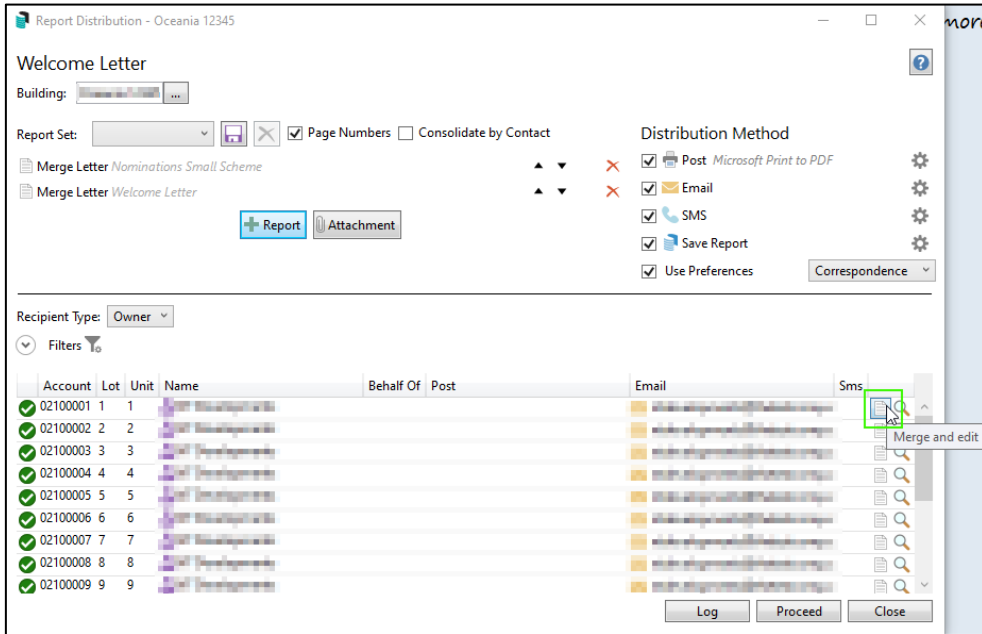
## 5.2   Merge Letter List screen features

5.2.1   Search

To edit a specific letter, click on the search filter and start typing. The letters will be filtered based on your criteria. From here the letter can be edited, copied, comments added, or deleted.
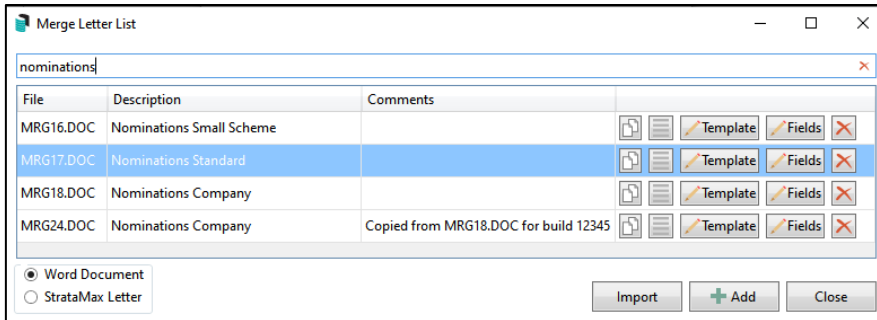

5.2.2   Copy and Edit

Click Copy and Edit to create a copy of the letter. The letter will open in Word where it can be edited once saved and closed in Word, the copied letter will appear in the letter list. The name of the letter will be the same as the original letter, however, an additional comment will appear in the Comments column indicating which letter was copied.
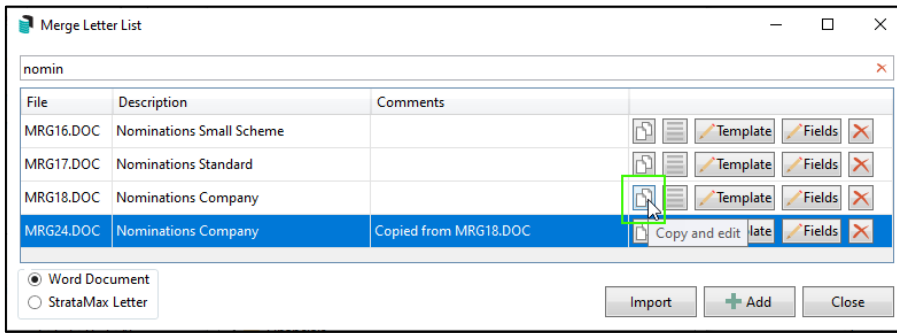
5.2.3 Comments

To add or edit comments, click on the Comments button.
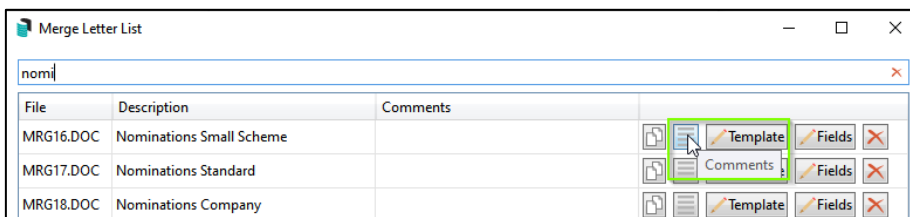
Add the required text in the Comments field and click OK. The text will appear in the Comments column. This is handy if copying and editing a letter for a specific building. We recommend adding the building name or number to the comments so the letter can be easily recognised.

Note that some comments are added automatically, for example when a letter is created via Copy and Edit button. (See section 4.2.2)
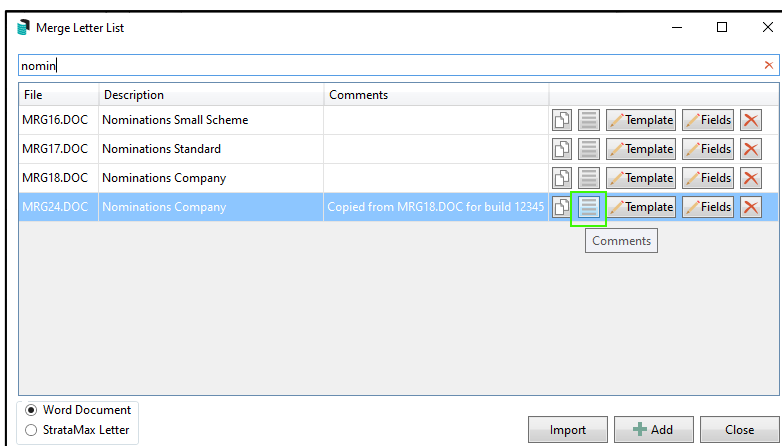
5.2.4 Template

Click the Template button to open the letter in Word to add new fields or modify text. Use this when creating new letters or to edit an existing one.
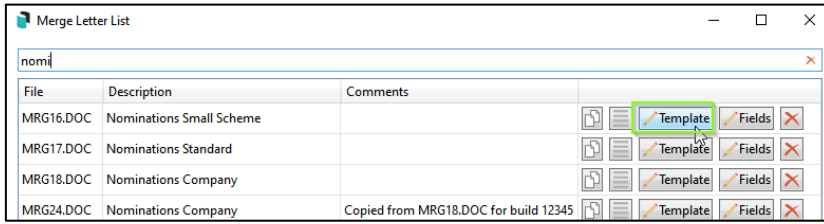
5.2.5 Fields

Click the Fields button to open the Merge Field Editor. (See Section 4.2.8 for more information)

5.2.6 Delete

Click the 'X' button to delete a letter. You will be prompted to confirm the action.

5.2.7 Word and StrataMax letters (.docx and. LET)

The toggle switch will toggle between Word Letters (.docx) and StrataMax (.LET) letters. The selection here determines the types of letters displayed.
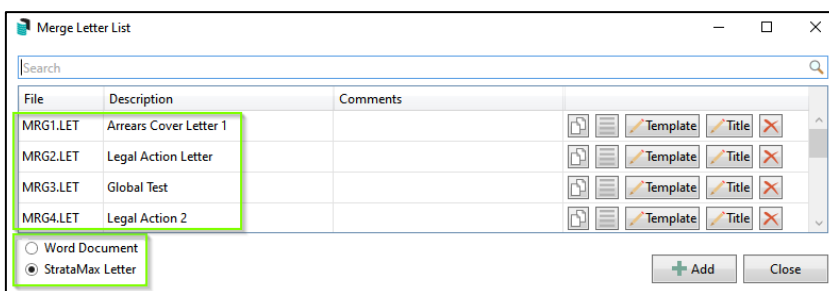

5.2.8 Merge Field Editor Screen

The following features can be accessed from this screen:

- The description of the letter can be added/modified.

- The Available Merge Fields column shows categories of fields. The selected category determines the fields shown.
- A field can be specifically searched for by using the search filter.
- Click Add to add the field once selected.
- The Selected Merge Fields window shows the fields that have been added.
- Right-click on an added field to use formatting or transformation functions.
- Click Remove to remove a field.
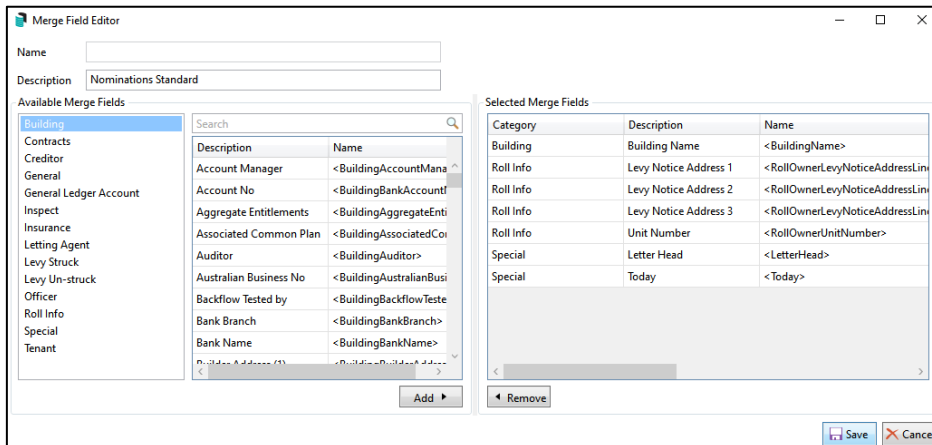

Once you have added or removed the required fields, click Save to return to the Merge Letter List screen.

5.3   Import Letters

5.3.1   Import a document

The Import feature allows a document to be imported from an external drive. Click the Import button to open a location on your computer. You can select a Word document from here to import to Merge Letters and edit as required.
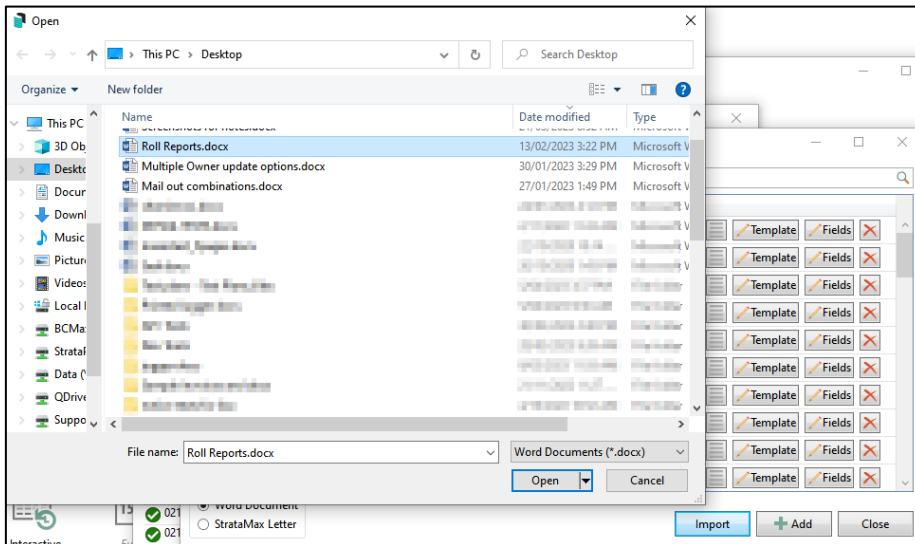
Once imported, the letter will be added to the list. Use the Field Editor to add the Description and fields as required. These can then be added to the document template.
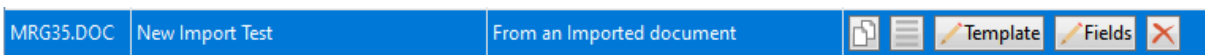
**Please Note**: Only a Word document can be imported. No other file formats are supported for this process.
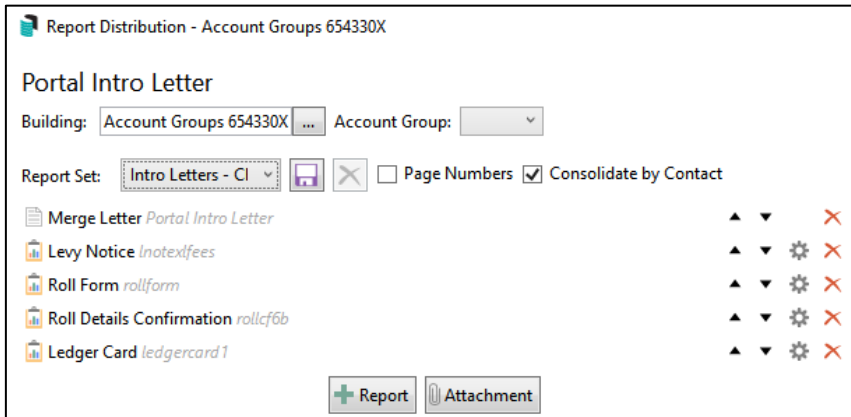
5.4   Roll Change of Ownership and Change of Details - System generated report sets

5.4.1   Intro Letter - Change of Details

A system generated Report Set has been created for the Change of Details process and will be automatically printed or emailed as per the set preferences when a Change of Details is performed.
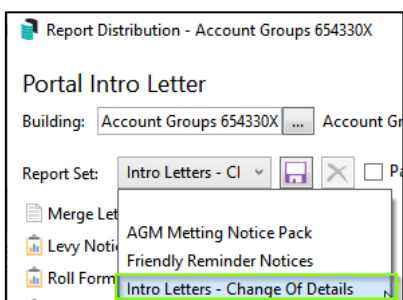
Select the Report Set from the list to see the reports included in the set. Reports can be added or removed as required. Click the Save button to save the Report Set.

5.4.2 Intro Letter - Change of Ownership

A system generated Report Set has been created for the Change of Ownership process and will be automatically printed or emailed as per the set preferences when a Change of Ownership is performed.
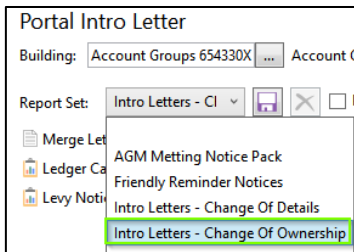

Select the Report Set from the list to see the reports included in the set. Reports can be added or removed as required. Click the Save button to save the Report Set.
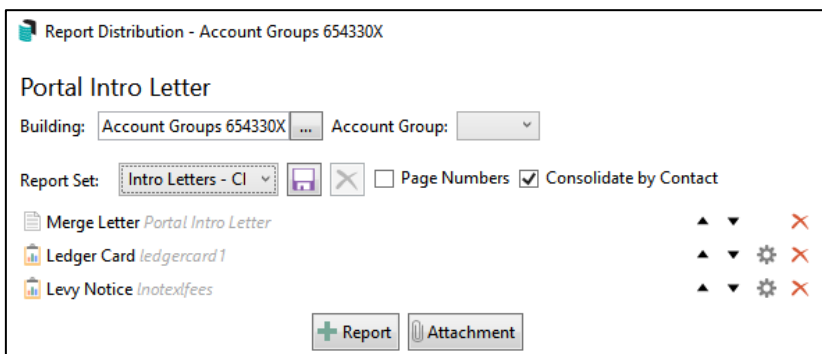
<u>Important things to Note:</u>

- The letterhead field will be added by default to the new letter field list and documents. If you do not require a letterhead in your letter, remove the field from the document.

- Merge Letters will not be accessible from GLMax in this version - if you use Merge Letters in GLMax, please advise the Support Team and it can be made available for you.

- It is no longer possible to save a local letter. On upgrade, these will be marked with the associated building name and number in the Comments field. We recommend using the Comments field to identify any letters created for a specific building. Please contact Support for assistance in removing any unwanted local letters.

- Merge letters created prior to this version will contain merge fields based on the old field names such as 'Building-231'. The merge letters will work as per usual. If required, a user can edit the merge field selection list and template to use the new field names. Right-click the field to rename.

6. Contact Card Additional Email Preference Options

Email addresses can now be configured in the Roll for specific use throughout the system. For example, an email address can be specified for use in the Invoice Hub only. This means the Invoice Hub will no longer see all email addresses associated with the Office Bearer, only the address configured for Invoice Hub will be recognised.

Specific use addresses that can be configured are:

- Correspondence
- Levy Notice
- Utility Billing
- Work Orders
- Invoice Hub
- Committee Correspondence
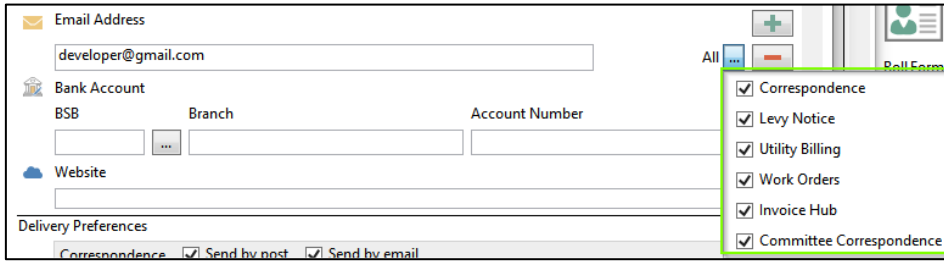
We recommend no more than three email addresses be added as they will need to be accommodated in reporting.

Please Note: The Utility Billing email address applies where Agents have a specific address and are configured to receive Utility Bills by email. For owners, the setting will only apply once Subgroup Debtors have been merged as Contacts. This project is planned for later in the year.

7.   Use BING for Email

The ability to use BING to distribute emails has been added to Report Distribution with this release. Emails will be sent to BING using configured email addresses and preferences and will be sent via the BING API if configured to use the API.

In the Distribution Method window, click the email configuration cog to see the option. Tick the Use BING for Email checkbox to send emails to BING for processing. Your company must have an account with BING to use this option.
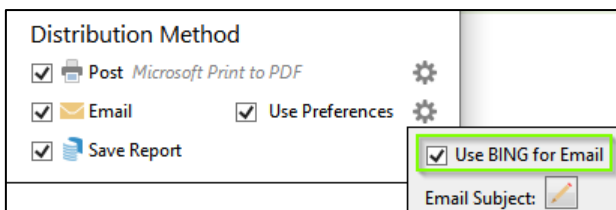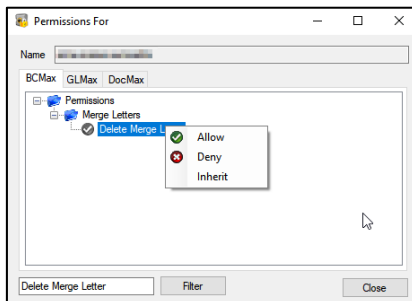

8.   Security Permissions

8.1   Delete Merge Letter

A new security permission has been added called Delete Merge Letter. This permission, by default, will be allowed for the Administrators group only. To allow access for other groups and/or users, the team member that manages security permissions will need to update them.

Navigate to Security Setup, select the user or group to update, right-click and select permissions and use the filter to search for Delete Merge Letter. Right-click the permission to set Allow, Deny, or Inherit.

8.2   Edit Email Templates

A new security permission has been added called Edit Email Templates under the report category. If the user does not have permission to do this, they will not see Merge Letters and specific reports under the Template Type selector in Email Template Management.

Navigate to Security Setup, select the user or group to update, right-click and select permissions and use the filter to search for Edit Email Templates. Right-click the permission to set Allow, Deny, or Inherit.
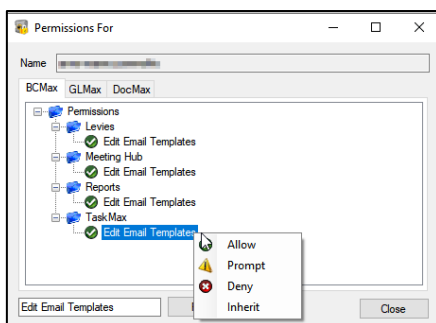
Please Note: If a user is denied access to a specific report in Security Setup, it will not be available to the user to include. The Report Publish screen will display a message advising that access is denied with an explanation of which menu/report; the user will not be able to select.

For more information, please refer to the StrataMax Help FAQ Page:

9. Additional Reports Table

Banking Reports

Bank Reconciliation

Bank Rec Summary

Bank Transaction Report

Building Reports

Building Info Summary

Debtors

Aged Balance

Levy Generation Schedule

Ledger Card

Levy Notice

Lot Account Dissection

Financial Statement Reports

Account Summary

Committee Expense

Creditor Balance

Financial Statements

Insurance Details

Lot Budget

Payment Plan Statement

Receipt Summary

Invoice Hub Reports

Invoice Hub Configuration

Invoices on Hold

Roll

Debtors List

Office Bearers

Owner Info

Owner Info Ledger

Plan Report

Roll Details Confirmation

Roll Form

Roll List

Roll Update Advice

Tenanted Lots Report

Vote Register

Tax Reports

BAS Reconciliation

10. Meeting Hub – New Merge Field

A new feature has been added to Online Voting to flag a Committee Election Nominee as 'Nominated from the floor,' a new merge field has been created 'IsNominatedFromFloor' which will populate as per below:

- If the 'Nominated from the floor' button has been selected on the 'Committee Nomination Details' page, the value of the merge field will be 'Yes'
- If the 'Nominated from the floor' button has not been selected, the value of the merge field will be 'No'

What's Better

- Debtor Adjustments - Reversed Arrears Fees are displaying in Debtor Adjustments and a payment is being allocated. This has been resolved and reversed Invoices will no longer show in Debtor Adjustments or Receipt Entry.
- Delete Building – The Delete Building function has been improved.
- Bank Reconciliation – Manual allocation screen will now show the details of the transaction being matched when tagging.
- Selection Enhancements - Selection of Account Manager, BSB, and building number in searches and other places has been enhanced for easy filtering.
- Building Information Favourites - Selecting too many favourites in Building Info causes a crash, a warning has now been added to let you know when too many have been selected.
- Creditor Searches - Search Creditor Invoice Items shows invoices more than once. This has been resolved.