Release Notes – Version 5.6.86

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]

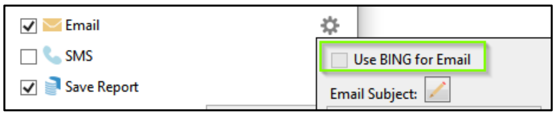
THE COMPLETE STRATA MANAGEMENT SOLUTION

StrataMax StrataCash STRATAPAY

What's New

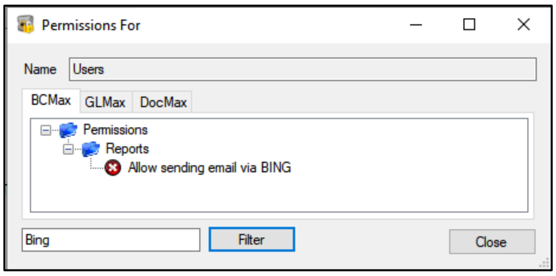
1. Report Distribution - 'Use BING for Email' Security Setting

A new security control has been added to manage access to the 'Use Bing for Email' setting in Report Distribution screens.



To access the security setting please use the following steps.

1. Navigate to Security
2. Use filter to search for 'BING'.
3. Set to 'Allow, Deny or Inherit as required.



Please Note: This setting should be reviewed on update to this version.

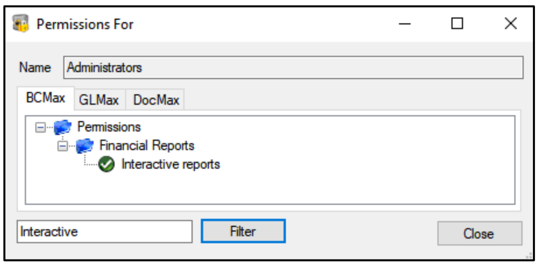
2. Interactive Reports

2.1 Security Settings

A new security control has been added to manage access to Interactive Reports.

To access the security setting please use the following steps.

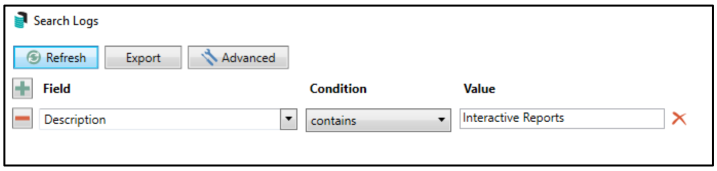
1. Navigate to Security
2. Use filter to search for 'Interactive Reports'.
3. Set to 'Allow, Deny or Inherit as required.



Please Note: This setting should be reviewed on update to this version.

2.2 Logging

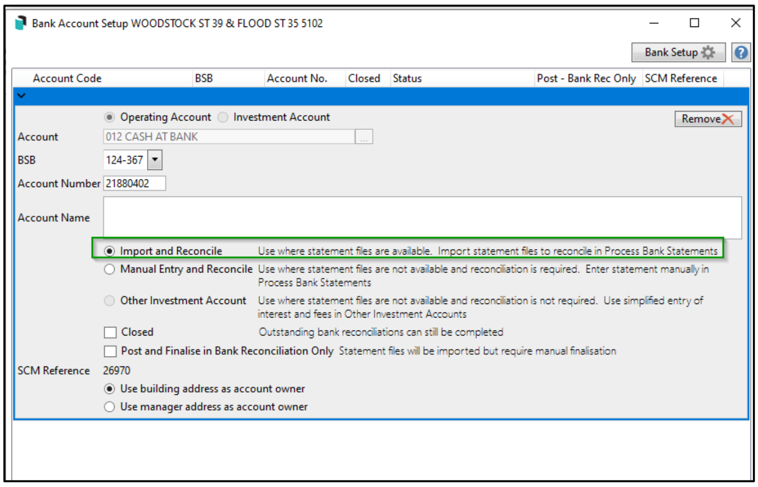
Access to Interactive Reports will now be recorded in the Log Viewer. Open Log Viewer and use the 'Description' Field to filter for Interactive Report logs.



The log will show who accessed the report and when.

3. Bank Account Setup – 'Other Investment Account'

All SCM accounts receive statement data, therefore we have disabled 'Other Investment Account' option for SCM accounts only. The option will now be greyed out for all SCM bank accounts.

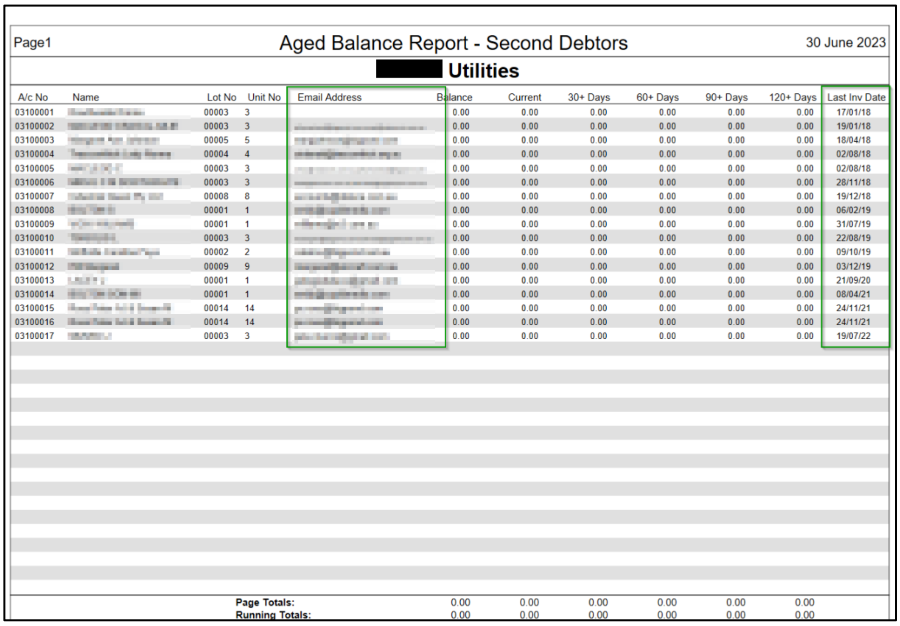


Please Note: on upgrade, any SCM account that has 'Other Investment Account' selected will be deactivated and set to 'Import and Reconcile'

4. Aged Balance Report – New Template Utility Second Debtors

A new template is now available 'SABLIST1 – Second Debtors Aged Balance List Template'

This will output the 'Email Address' instead of the telephone number and the 'Date of the most recent 'Utility Invoice' instead of the last arrears. See example below:



Page1 Aged Balance Report - Second Debtors 30 June 2023

[redacted] Utilities

A/c No	Name	Lot No	Unit No	Email Address	Balance	Current	30+ Days	60+ Days	90+ Days	120+ Days	Last Inv Date
03100001	[illegible]	00003	3		0.00	0.00	0.00	0.00	0.00	0.00	17/01/18
03100002	[illegible]	00003	3	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	19/01/18
03100003	[illegible]	00005	5	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	18/04/18
03100004	[illegible]	00004	4	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	02/08/18
03100005	[illegible]	00003	3	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	02/08/18
03100006	[illegible]	00003	3	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	28/11/18
03100007	[illegible]	00008	8	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	19/12/18
03100008	[illegible]	00001	1	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	06/02/19
03100009	[illegible]	00001	1	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	31/07/19
03100010	[illegible]	00003	3	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	22/08/19
03100011	[illegible]	00002	2	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	09/10/19
03100012	[illegible]	00009	9	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	03/12/19
03100013	[illegible]	00001	1	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	21/09/20
03100014	[illegible]	00001	1	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	08/04/21
03100015	[illegible]	00014	14	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	24/11/21
03100016	[illegible]	00014	14	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	24/11/21
03100017	[illegible]	00003	3	[illegible]	0.00	0.00	0.00	0.00	0.00	0.00	19/07/22
		Page Totals:			0.00	0.00	0.00	0.00	0.00	0.00	
		Running Totals:			0.00	0.00	0.00	0.00	0.00	0.00	

Please Note: This template is also available in Main 'Aged Balance List (Second Debtors)', but please note that the Last Invoice column will not report dates from in the main as it was designed specifically for Utility Second Debtors as the Last Invoice Date is Utility Invoices Only.

What's Better

- Roll List Reports – The following Roll lists have had the totals re-added to the templates
- Report Distribution – When running Levy Notices via Report Distribution, the system will no longer crash when 'Include Current' is not selected.
- Report Distribution – When sending a report to an internal user where the first name and surname is longer than 30 characters the system was crashing, this has now been resolved.
- Meeting Hub - Report Distribution - *<<Nameandaddressauto>>* and *<<NameandLevyNoticeaddressauto>>* fields will include multiple contacts.
- Report Distribution - Roll Form has been changed to open as an internal report by default. A single form for all owners will be produced if the process is run for an Internal User. Individual forms will be produced if run for an Owner.
- Report Distribution missing property issue with LNOTE_203A template has been resolved
- Entry Report - Export to Excel was not picking up template data beyond the first template. This has been corrected to show relevant columns for all templates.
- Roll Change of Details – Letter and Address Title (2) fields when editing an owner record have been aligned to the left close to the field names and will now display more text.
- Report Distribution - Levy Notice was crashing if there was no bank account set up

- Merge Letters – The following issues have been addressed:

    1. **Merge Letters** - *<<RecipientLetterTitle>>* merge field not displaying the correct information in certain scenarios. This has been corrected.
    2. **Report Distribution** - letter with Letting Agent fields where there is a terminated agent was using terminated info. This has been resolved.
    3. **Report Distribution** - Applicant letter with Building specific fields (*<<BuildingPlanNumber>>*, *<<BuildingAccountNumber>>*) will look at current building
    4. **Building Information** - *<<ABN>>* field will now show spaces in a merge letter.

- Meeting Hub/Document Generation - The 'Adjourned Statement' merge field will now output formatted HTML.
- GLMax- Aged Balance Report template has been activated for GLMax Debtors Report – Template 'aged_balance_glmax_default'.