

Release Notes – Version 5.6.95

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



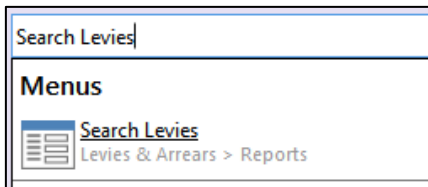
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What's New

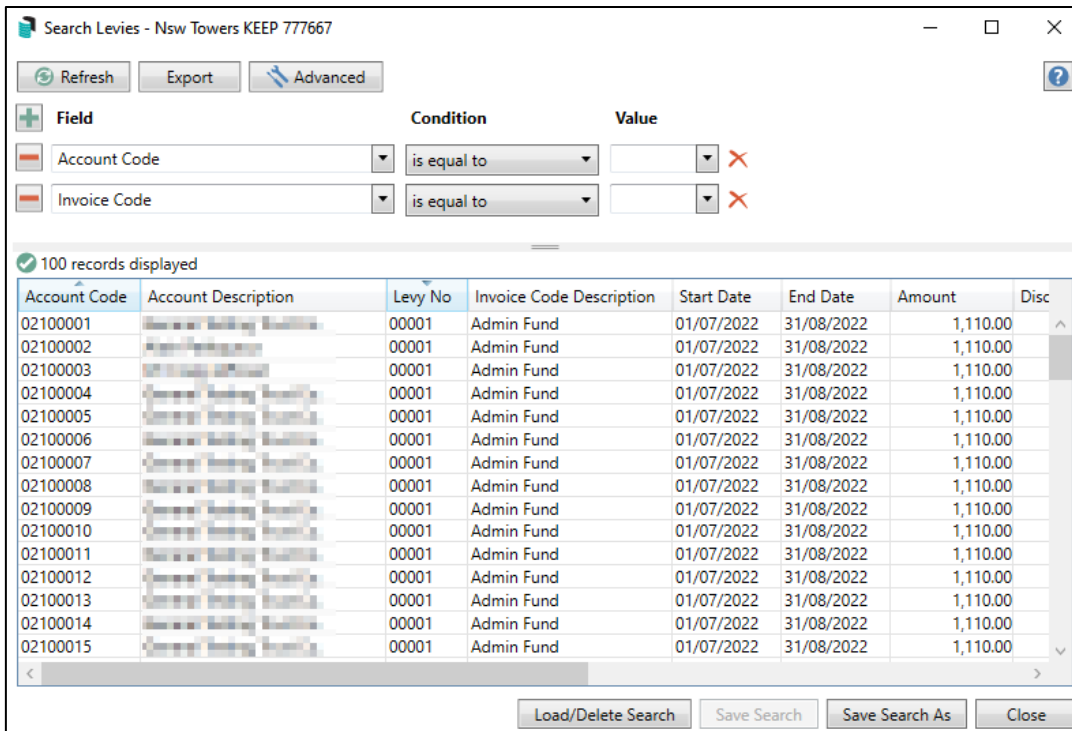
1. New Search – Search Levies

The ability to search & report levy information for a building has been included in this release. This search will return levy data based on the search criteria selected. The search will default to Account Code and Invoice Code fields, but other fields can be included to refine searches. Saved searches can also be added. To see the new search use the following steps:

1. Type 'Search Levies' into the Desktop Search and click to open.



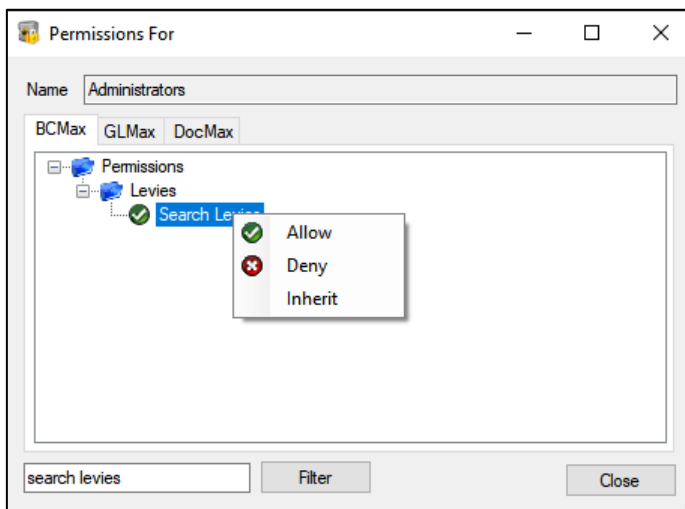
2. The search will open showing levies associated with the building.



3. Click the + to add a field to further refine the search if required.
4. Click Refresh to reload the search with filter.
5. Click Save Search and name the search if required.

1.1 Search Levies – Security

A new Security control has been added to manage access to the Search Levies menu item. Navigate to Security and use the filter to find 'Search Levies'. Set to the appropriate permissions for a User or a User Group.



2. StrataPay Deposit – New Australia Post biller code

StrataPay deposit slips have been updated to comply with Australia Post specification requirements to reflect our newly issued Australia Post biller code – *3599. Changes are outlined below:

- The Keyline code will now display *3599
- The Barcode identifier is updated to *3599.
- Australia Post Payment Instruction now reflects the following wording: **Present this bill in person at any Australia Post store to make a cheque or EFTPOS payments.**

Payment Options	
Tel: 1300 552 311 Ref: 9725 1200 3	Telephone: Call this number to pay by credit card. International: +613 8648 0158 (charges apply).
www.stratamax.com.au Ref: 9725 1200 3	Internet: Make credit card payments online (charges apply). Visit www.stratamax.com.au
www.stratapay.com/ddr Ref: 9725 1200 3	Direct Debit: Make auto payments from your credit card* or bank account. Visit stratapay.com/ddr to register *Credit card charges apply.
Biller Code: 74625 Ref: 9725 1200 3	BPay: Contact your participating financial institution to make a payment from your cheque or savings account using BPay.
Billpay Code: 3599 Ref: 9725 1200 3	In Person: Present this bill in store at Australia Post to make cheque or EFTPOS payments.
Make cheque payable to: StrataPay 9725 1200 3	Mail: Send cheque with this slip by mail to: StrataPay, Locked Bag 9 GCMC, Bundall Qld 9726 Australia
BSB: 067-970 Acct No: 9725 1200 3 (Applies to this bill only)	Internet Banking - EFT: Use this BSB and Account Number to pay directly from your bank account in Australian Dollars (AUD). Account Name: StrataPay Bank: CBA, Sydney, Australia.

StrataPay Reference
9725 1200 3

Amount	Due Date
\$1,221.00	01 Jul 22

TESTING1234 KEEP
777667/02100001 Lot 1/1
General Testing Trust Co.

*3599 972512003

All payments made through StrataPay payment options are subject to User Terms and Conditions available at www.stratapay.com or by calling 1300 135 610 or email info@stratapay.com. By using the payment options provided by StrataPay you are taken to have read and understood these User Terms and Conditions prior to using StrataPay. Credit card acceptance is subject to notation above. Additional charges may apply.

3. Receipt Entry – Allocation of Interest

A new configuration setting is now available that allows users to allocate interest last, on a per-building basis or globally.

To view the new configuration setting:

1. Navigate to Receipt Entry
2. Click on File
3. Select Configure

Configuration

Post under payment always (Building Override) Use Global Setting

Don't AutoPost Over/Under in Sub-Groups

Auto Transfer Credit Interest and Other

Default Receipt Type Cheque

Minimum Auto Unposted Interest 0

Sundry Receipt Search Key Details

Offer Insurance Claim Matching

Cents Rounding Adjustment Account 10700 OTHER INCOME

Clear Arrears Flag

Clear Arrears Flag Tolerance 0

Allocate to Interest Last

Allocate to Interest Last (Building Override) Use Global Setting

Queensland Building Settings

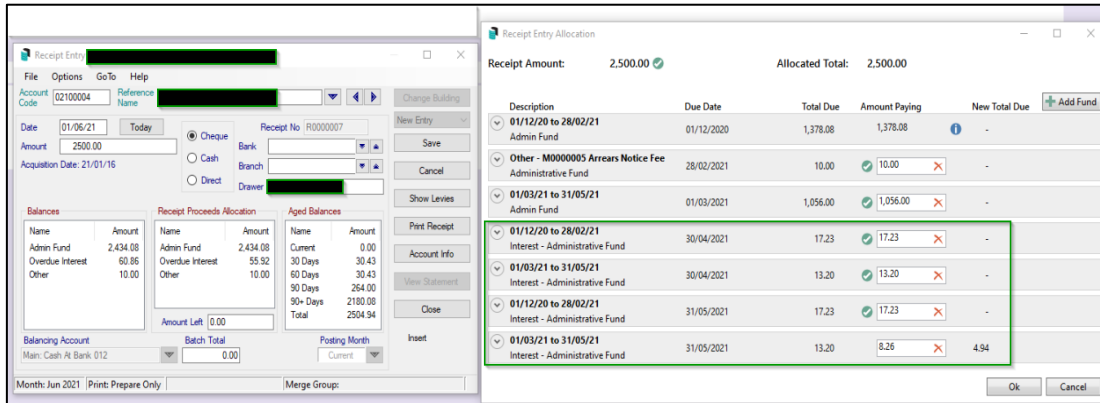
Queensland Outstanding Interest Allocation Rule

Queensland Outstanding Interest Allocation Rule (Building Override) Use Global Setting

Close

Please Note: This setting will not override the QLD Interest allocation rule.

If 'Allocate Interest Last' is active then this change can be seen when using Receipt Entry, Receipting via Bank Reconciliation, Debtor Adjustments. Interest will be listed last on the allocation screen as shown in the example below.



4. Merge Letters – Optional Building Tag

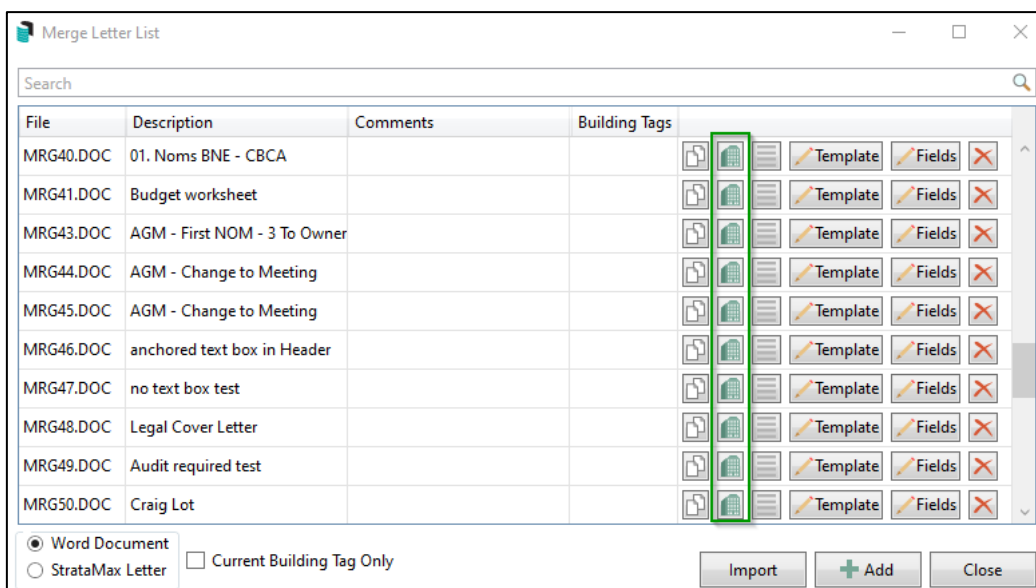
A new option has been added to Merge Letters to allow users to set a merge letter to be specific to a building.

To assign a merge letter to a specific building please follow the below steps:

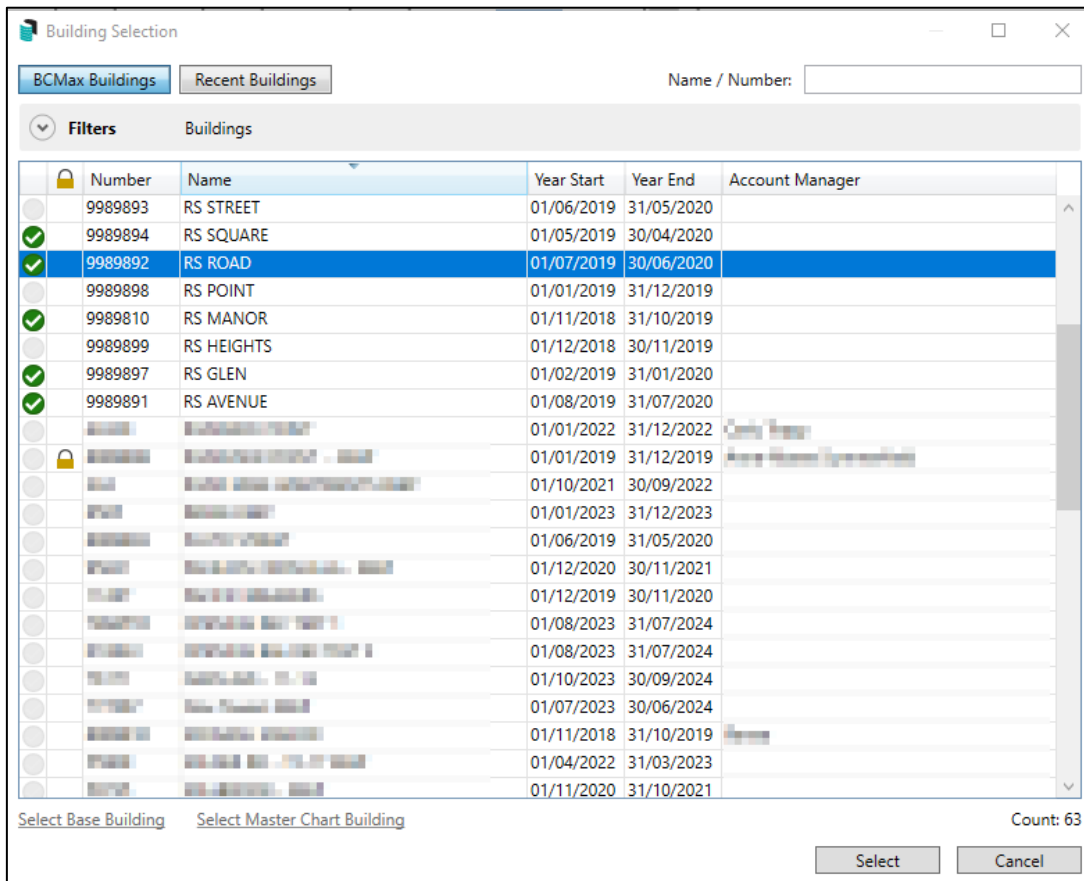
1. Navigate to Merge Letters
2. Click on Merge Letters option.



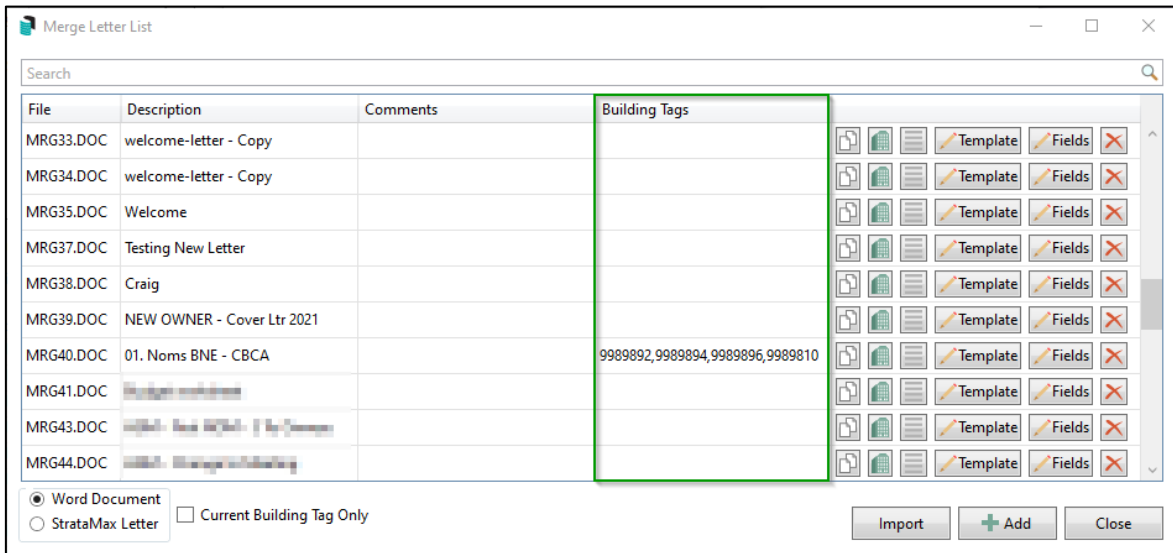
3. A New building Icon is available as shown below.



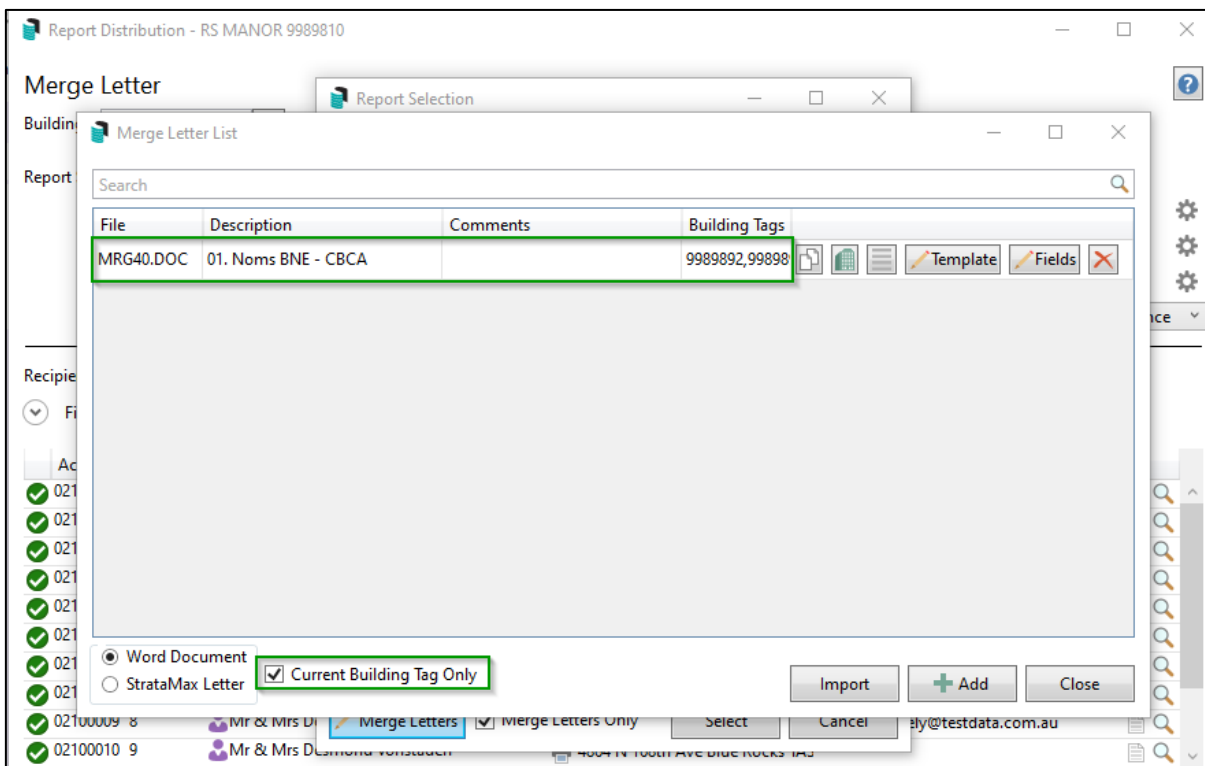
4. Click on the 'building icon' next to a specific merge letter.
5. Tag the required buildings to be selected



6. Click 'Select'
7. The selected buildings will populate the Building Tag column.



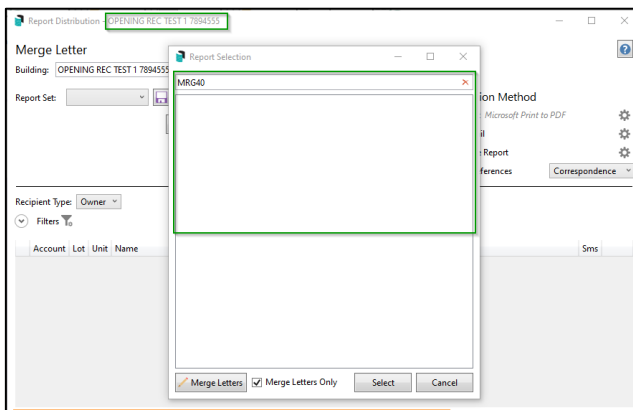
8. Tick the 'Current Building Tag Only'
9. The system will filter all Merge Letters available for the current building selected.



10. Access to merge letter MRG40.doc is limited to the buildings listed in the Building Tags column. If you are in a local building not included in the tags, MRG40.doc will not be available when Merge Letters is opened. See example below:

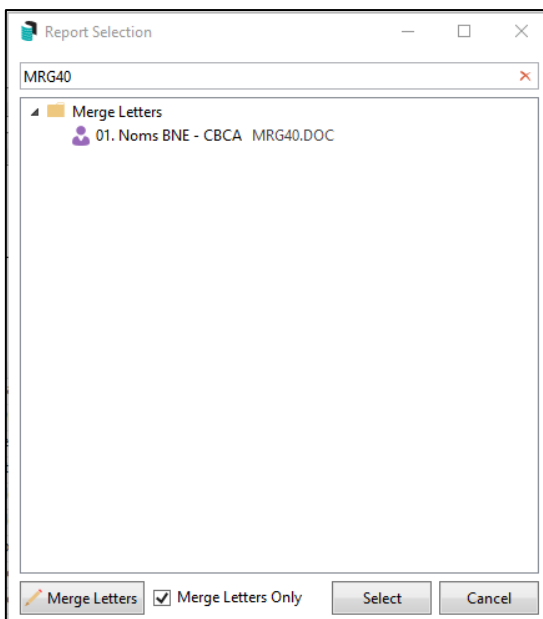
Example when the current building selected is not specific to a Merge letter:

- Local Building selected '7894555'
- This building is not selected in the Building Tags for MRG40.doc
- When Merge Letters is opened
- User searches for MRG40.doc
- It will not appear in the list for selection.

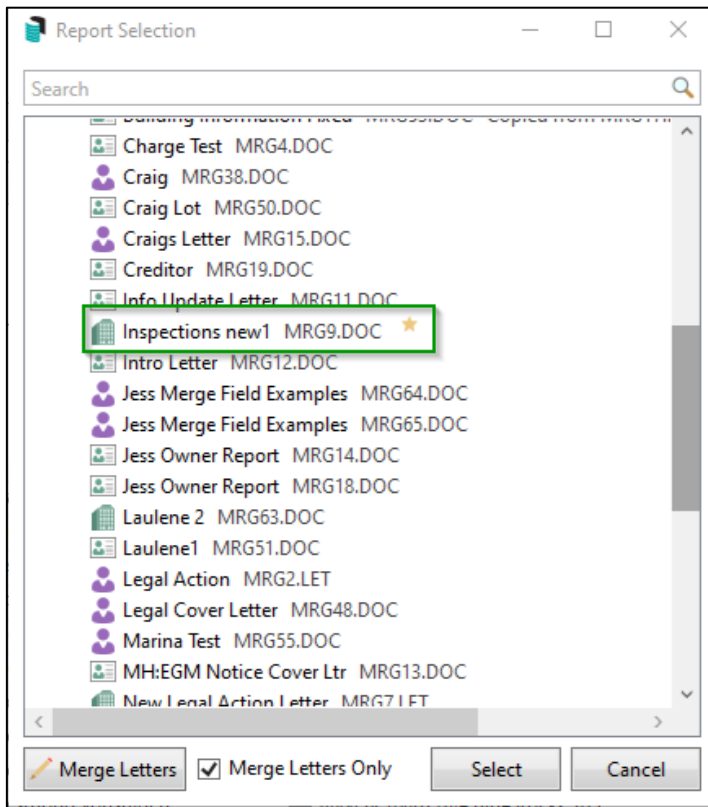


Example when the current selected building appears against a Merge Letter that is specific to a building:

- Local Building selected '9989810'
- This building appearing in the selected in the Building Tags for MRG40.doc
- When Merge Letters is opened
- User searches for MRG40.doc
- Merge Letter will be available to the user.

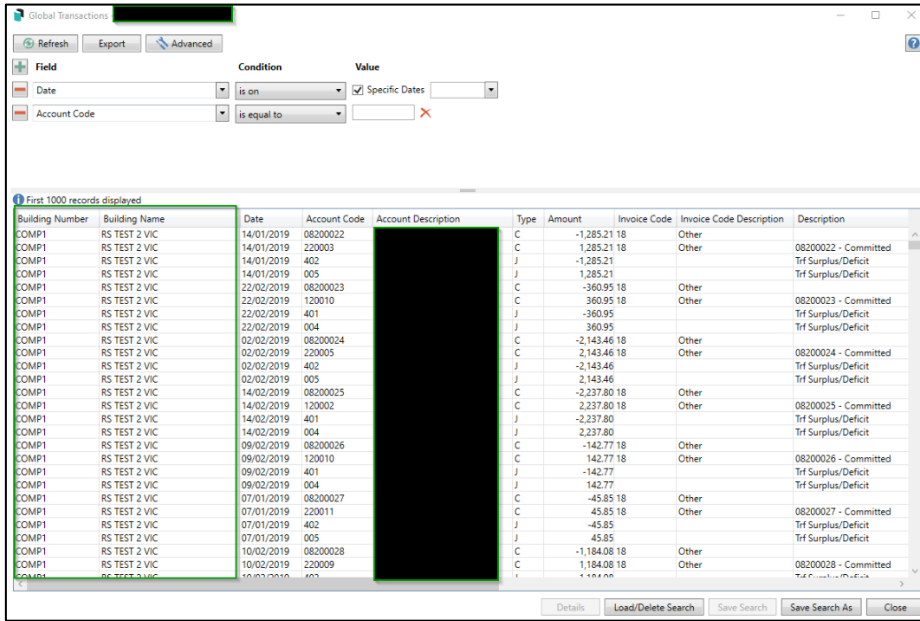


Please note: When you open the Merge Letters module and the Report Selection screen appears, a star will be presented next to any merge letter associated with the selected building. Please see example below:



5. Global Transactions – Default Building Columns

We have enhanced Global Transactions to default the first two columns as Building Number and Building Name.

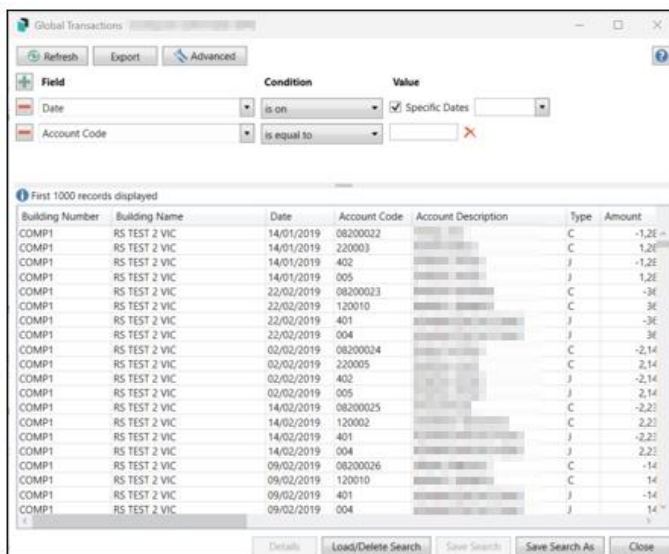


Important Note: This change does not apply to saved searches that have been set as default.

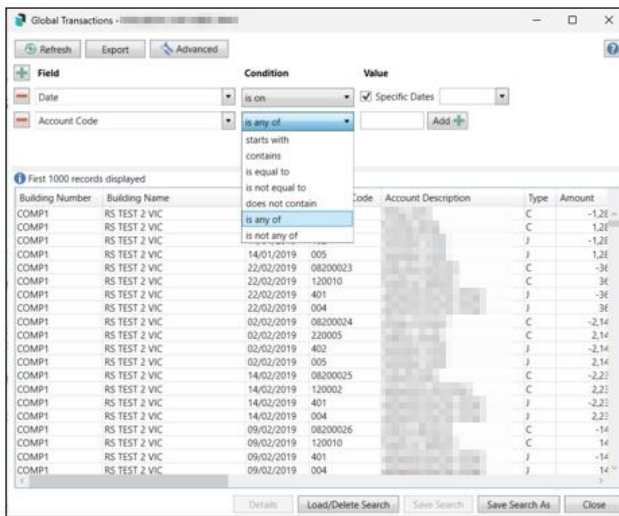
6. Global Transactions – Enhanced Search Behaviour

The Global Transactions Search has been enhanced to return data based on the new search conditions 'Is Any Of' and 'Is Not Any Of' for Account Code, Invoice Code and Fund Code criteria. To see the new search use the following steps.

1. Access Global Transactions and change or add one of the codes (Account Code) with the new Criteria.



- Click on the Condition drop down option to display the new Criteria to search on



- Click on the condition, add an Account code in the Value field, press Add + and then refresh to run the new search.

7. API Enhancements

7.1 GLMax Debtor query

GLMax Company Debtors - Buildings will now be identified by the linked building number when running the GLMax Company Debtors query.

7.2 Update Contacts using the API.

API Patch - A 'patch' operation has been added to the API which will use the same control as BCMax to apply changes to the contact with the same validation rules.

What's Better

- Debtor List Report – Will now display summary information, one debtor per line. This will also include the Address 3 information.
- Create Merge Data – This option has been removed from the system as it is no longer in use.
- Levy Management – Generated credit levies were unable to be edited to zero, this has now been resolved.
- Building Transfers – The transfer date was recorded incorrectly if captured at a time zone other than local. This has been resolved.
- Search Inspections – Current year data only will now be returned when using the Search Inspections query.
- Opening Balance Receipts – Receipts created by Opening Balances could previously not be reversed. This has been changed to allow reversal of opening balance receipts.
- Global Transactions – The filter in the selection lists for certain fields were not filtering correctly, this has now been resolved.