Release Notes – Version 5.6.99

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. Account Maintenance – Export

The following fields have been added to the Account Maintenance Export Report

- Type i.e. Posting / HeaderCategory
- Update Code (sub-group update report replacement effectively)
- Non-Mutual Income
- Update codes

Open Account Maintenance and click 'Export' to see this report.

Accour	its and a second se										
Code	Description	Туре	System Flag	Account Group	Report Group	Tax	Trading Fund	Restrict	Non Mu	Subgrou	Reporting Category
003	OWNERS FUND	Header									
004	ADMINISTRATIVE FUND	Equity					Admin Fund				
005	SINKING FUND	Equity					Sinking Fund				
00701	BUILDING FUND	Equity					Other				
00702	CAR PARK FUND	Equity					Other				
0098	TOTAL	Total2									

2. Web API – Body Corporate Name

The "BodyCorpName" field has been added to the Building Info query in the web API. This will produce the Body Corporate Name in the building.

3. Creditor Compare

The Creditor Compare Report has been replaced by a new screen that shows duplicate or unused creditors and allows them to be merged, hidden or deleted from this screen. This tool is useful if a property has been transferred from another StrataMax manager. Navigate to Creditor Maintenance and click 'Compare' to see this new feature.



Creditor records can be filtered by:

- Duplicate Accounts
- Not Recently Used accounts.
- No Master Account
- Account Code Different to Master Chart

3.1 Duplicate Account

Duplicate accounts will be presented with the option to merge the codes. An option for each code will be presented. Click 'Merge to Duplicate' to merge the selected local code to the new code which will be displayed beside the 'Merge to Duplicate' Button.

Credit	or Compare												-		×
Duplica	te Account 🗌 Not Recently Used 🗌 Ac	count Code	Different To	Master 🗌 N	o Master Ad	count 🛞]								
Building #	Account Name	Local A/c	Master A/c	ABN	Loc	Balance	Last Activity	Transactions	Quotes	Work Orders	Documents				
107080	INTO WEAK ROOK 2 IN M	08200106		10,000	BRISBANE	0.00	29/08/17	2	0	0		🗼 Duplica	te Acco	unt: 082/	00611
107080	Internet Section Section 1998	08200611		10000	BRISBANE	0.00	28/08/20	2	0	0) 🔥 Duplica	te Acco	unt: 082	00106

This will present the Change Code screen so changes can be processed.

Alternatively, select 'Hide' to hide the account from selection screens.

3.2 Not Recently Used Accounts

This filter will display accounts that have not been used for 3 years or more.

If the account has never been used, the Delete and Hide options will be presented. If the account has been used, the Hide option only will be presented.

The Hide option will hide the account from selection screens.

The Delete option will delete the account.

🔋 Credito	or Compare											
🖌 Duplicat	e Account 🔽 Not Recently Used	Accour	nt Code Differ	ent To Master		No Master	Account 🛞]				
Building #	Account Name	Local A/c	Master A/c	ABN	Loc	Balance	Last Activity	Transactions	Quotes	Work Orders	Documents	
0000	ADDUCT INFORMATION AS	08200374	08200374			0.00		0	0	0	0	Delete Hide

3.3 Account Code Different to Master Chart

This filter will show accounts that have a different code to the Master Chart. Click 'Merge to Master' to merge the code.

Creditor	r Compare											-		×
Duplicate	e Account 🔲 Not Recently Used 🔽 Acc	ount Code	Different To N	Maste 🕤 🛞										
Building #	Account Name	Local A/c	Master A/c	ABN	Loc	Balance	Last Activity	Transactions	Quotes	Work Orders	Documents			
107080	LK BC MAN 3	08211203	08200007			0.00	10/03/08	2	0	0	0	Merge to master	Hide	٦

This will present the Change Code screen so changes can be processed.

Alternatively, select 'Hide' to hide the account from selection screens.

3.4 No Master Account

This filter shows accounts that are in the building but not in the Master Chart. Accounts not in the Master Chart can be added through the Creditor in Master Chart screen in Creditor Maintenance.

Credito 🗌 🗌	r Compare e Account 🔲 Not Recently Used 🗌] Account C	ode Different	: To Master 🔽] No Master Account	9						- 0
Building #	Account Name	Local A/c	Master A/c	ABN	Loc	Balance	Last Activity	Transactions	Quotes	Work Orders	Documents	
8875	showing the product is the	08200947		and the second		0.00		0	0	0	0	Delete Hide
8875	A MARKA STORE SHARE	08209593		0.000		0.00	24/02/22	2	0	0	0	
8875	100 No.	08202477		and the second		0.00		0	0	0	0	Delete Hide
8875	IN ANY DRIVEN	08299999				0.00	14/11/23	12	0	0	0	
8875	NOCIMINE SHOE FILE	08207437		+C1007		0.00		0	0	0	0	Delete Hide

3.5 Hide Where Possible / Delete Where Possible

There is an option to 'Hide Not Recently Used' and an option to 'Delete Where Possible' in which will delete or hide in bulk any records where applicable.

Hide Not Recently Used Delete Where Possible Close
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4. Report Distribution – Select/Deselect Option

Enhancements have been made to Report Distribution - Merge Letters and Emailing Communications.

New Recipient selection is now available 'All & None' to select quickly and easily select all or no contacts. This will give you more control over contact selection as an alternative to keyboard shortcuts and all Contacts being pre-selected and emails being sent to incorrect Recipients.

Report Distribution

Report Distribution - RENEE KEEP 6565				_	
Building Information Building: RENEE KEEP 6565					0
Report Set: V	✓ Page Numbers Consolidate by Contact ▲ ▼ Report Attachment	×	stribution Metho Post Microsoft Pi Email Save Report Use Preferences	rint to PDF	¢:
Recipient Type: Owner V Recipient Sele	ection: All None				
✓ Filters T₀		Ema	i	Sm	15
	ection: All None	Ema	il	Sm	
Filters To Account Lot Unit Name	Behalf Of Post	Ema	il	Sm	□ Q ^
Filters To Account Lot Unit Name 02100001 1 1	Behalf Of Post	Ema	il	Sm	
Filters To Account Lot Unit Name 02100001 1 1 02100002 2 2	Behalf Of Post	Ema	il	Sm	
Filters Common Composition Name 02100001 1 1 0	Behalf Of Post	Ema	a	Sm	
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Email Communication

Compose File Options	Email (RENEE KEEP Attachments	6565)		-	×		
Send Email ~	To Bcc Subject:				0		
	ntacts rences Email Addre e: Owner ~ Reci	ss Purpose Correspond pient Selection: All N			-		×
	Lot Unit Name		Behalf Of Post	Email		Sms	
					Select	Can	cel

5. Search Enhancements

5.1 Log Viewer – Username value

Log Viewer Username now has a drop-down value field to select from an available user pick list.

Search Logs		
Refresh Export Advanced		
🕂 Field	Condition	Value
Date/Time	is on or after 🔹	Specific Dates Today
Current Building		
Category	is equal to 🔹	• ×
Username V	is equal to 🔻	
		and the second sec
Date/Time Log Lev Username	Description	Building Category

5.2 Search Bank Accounts – TD Maturity Date

New Condition option has been added to the Field TD Maturity Date - 'Next 7 Days or Next 30 Days'

		Export 🔨 A							
+ Fie	eld			Condition	Value				
- TC	Maturity D	ate	•		✓ Specific Dates	•			
	atus			is on or after	A Removed V				
50	atus			is on or before	Kemoved •				
- Ac	count Num	ber	•	is today	X				
			-	is yesterday					
A	count Code		•	is tomorrow	• ×				
				is in the last 7 days					
62 re	ecords displa	ived		is in the next 7 days					
Bank		,		,	-				
	BSB	Account Number	SCM Referen	is in the last 30 days	uilding Name	Status	Closed	Account Code	Account De
	BSB 184-446	Account Number	SCM Referen	is in the last 30 days is in the next 30 days	uilding Name	Status Import and Reconcile	Closed	Account Code 012	Account De CASH AT BA
MBL			SCM Referen	is in the next 30 days		Import and Reconcile	Closed		CASH AT BA
MBL ANZ	184-446	1000	SCM Referen	is in the next 30 days is empty	a service		Closed	012	CASH AT BA CASH AT BA
MBL ANZ MBL	184-446 012-005	and the second	SCM Referen	is in the next 30 days	Internet and Internet	Import and Reconcile Import and Reconcile	Closed	012 012	CASH AT BA CASH AT BA CASH AT BA
MBL ANZ MBL MBL	184-446 012-005 182-244	annan Marian Marian	SCM Referen	is in the next 30 days is empty	BURNING VILLA	Import and Reconcile Import and Reconcile Import and Reconcile		012 012 012 012	CASH AT BA CASH AT BA CASH AT BA CASH AT BA
MBL ANZ MBL MBL MBL	184-446 012-005 182-244 184-446	anterna de la companya de la compa	SCM Referen	is in the next 30 days is empty is not empty	ENTRY IN A CONTRACT OF A CONTR	Import and Reconcile Import and Reconcile Import and Reconcile Import and Reconcile		012 012 012 012 012	CASH AT BA CASH AT BA CASH AT BA CASH AT BA CASH AT BA
MBL ANZ MBL MBL MBL MBL	184-446 012-005 182-244 184-446 182-244	Antonia Materia Materia Materia Materia Materia	SCM Referen	is in the next 30 days is empty is not empty	HIGHWAR HIGHWARDAN HIGHWARDAN CON HIGHWARDAN HIGHWARDAN	Import and Reconcile Import and Reconcile Import and Reconcile Import and Reconcile Import and Reconcile		012 012 012 012 012 012 012	CASH AT BA CASH AT BA CASH AT BA CASH AT BA CASH AT BA CASH AT BA
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What's Better

- Log Viewer If a date column displays hours in the log viewer, then the export option will export the same text showing both date and time.
- Searches Date and Time will now report on the searches e.g. Log View and Distribution Viewer.
- Financials Budget Reports Prior Year Reporting Next Year Period Dates was not correct if Next Year End.
- Cert40 Levy discount amounts were showing under OTHER and have now been removed.
- Creditor Master Chart Errors were occurring when double clicking with no creditor selected, this has now been resolved.
- Account Maintenance The Category on Update Codes were not being retained after save, this has now been corrected.
- Search Building Information History and History option in Building Information will now show 'Change Date' in Date/Time format
- Merge Letter List Edit Temporary Merge Letter was making the merge letter permanent; this has been resolved. A Temporary Column has now been added to the Merge Letter List to make the current state clearer.
- TaskMax Account Selection List Double clicking on the Ok button of the Account Selection window was resulting in an error. This has now been resolved.
- Report Distribution Logs Error was occurring if 'Building' column is included in displayed column and there are over 1200 recipients.
- Search Quotes The Column name in Search quotes 'Quote Date Issued' was showing as 'Quote Deadline' this has been resolved
- Search Buildings Reception Name, Account Manager Assistant and Asset Manager Name were showing with Comments in the name instead, this has been fixed
- DocMax When loading the available expense accounts for the creditor invoice items the system will no longer show any expense accounts that have been restricted.
- Change GST style from NET to Gross where Gross accounts do not exist yet was failing. This has been corrected.
- Utility Subgroup - Finalised account Lot & Unit number details will be retained in the Debtor account called Finalised.
- Report Set Financial Export Report was generating a crash which has now been corrected.