

# Release Notes – Version 5.6.99

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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 / HeaderComponent
- Update Code (sub-group update report replacement effectively)
- Non-Mutual Income
- Update codes

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

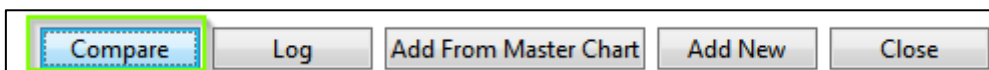
Code	Description	Type	System Flag	Account Group	Report Group	Tax	Trading Fund	Restrict Non Mt	Subgro	Reporting Category
003	OWNERS FUND	Header								
004	ADMINISTRATIVE FUND	Equity					Admin Fund			
005	SINKING FUND	Equity					Sinking Fund			
00701	BUILDING FUND	Equity					Other			
00702	CAR PARK FUND	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The Creditor Compare Report has been replaced by a new screen that shows duplicate or unused creditors and allows them to be merged, hidden or deleted from this screen.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.

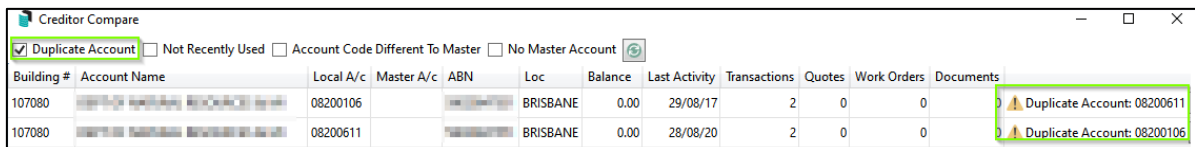


Creditor records can be filtered by:

- 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.



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

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

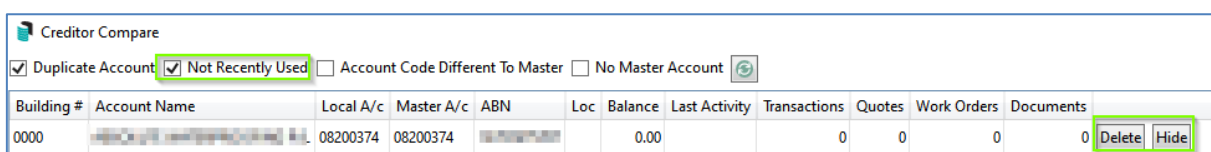
### 3.2 Not Recently Used Accounts

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.

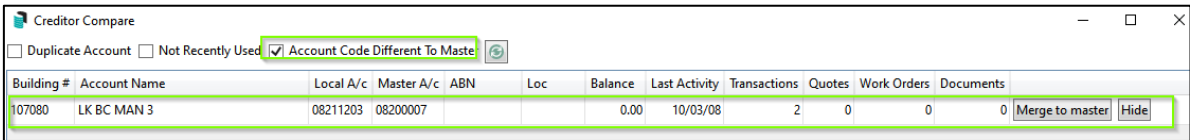
The Hide option will hide the account from selection screens.

The Delete option will delete the account.



### 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.

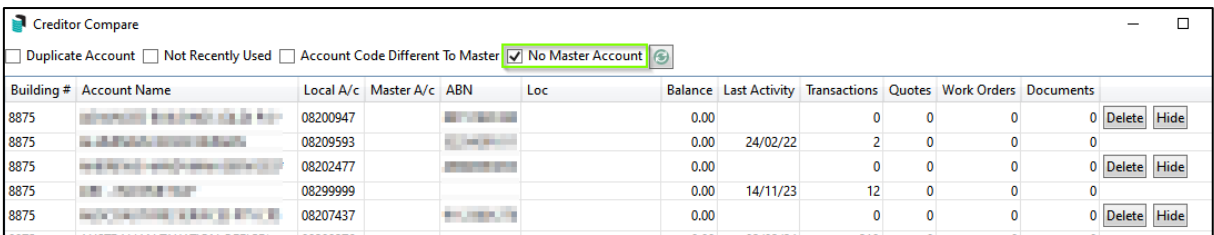


This will present the Change Code screen so changes can be processed.

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

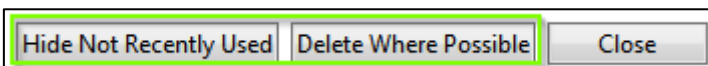
### 3.4 No Master Account

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.



### 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.

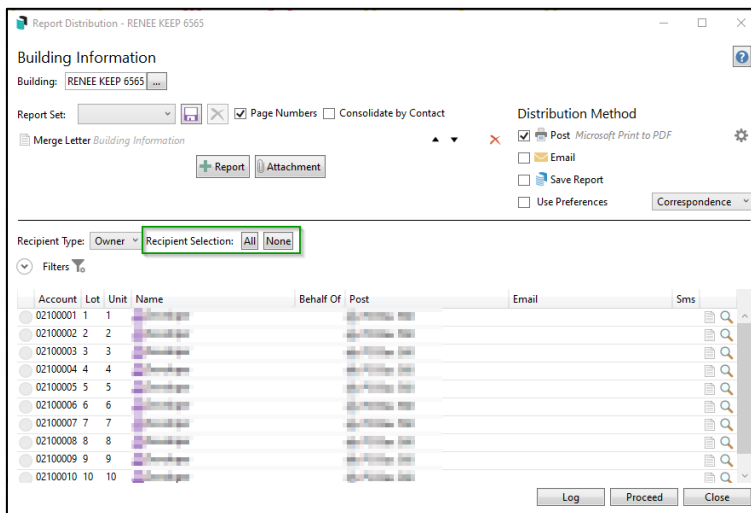


## 4. Report Distribution – Select/Deselect Option

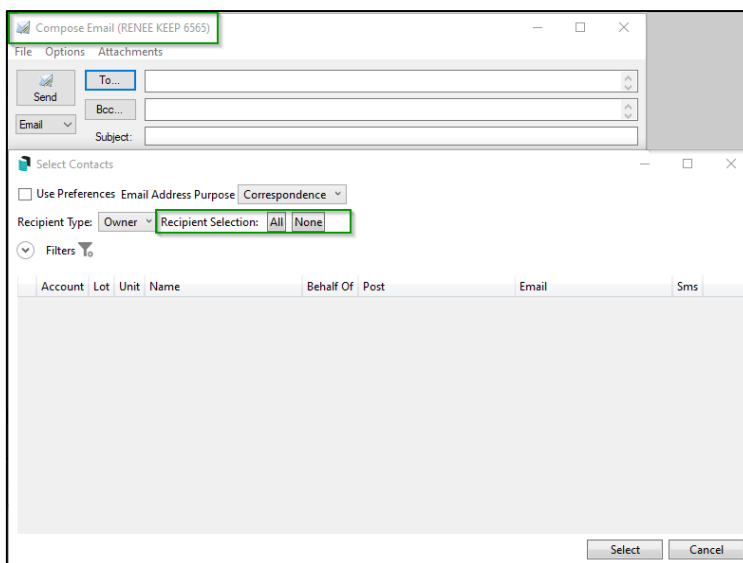
Enhancements have been made to Report Distribution – Merge Letters and Emailing Communications.

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



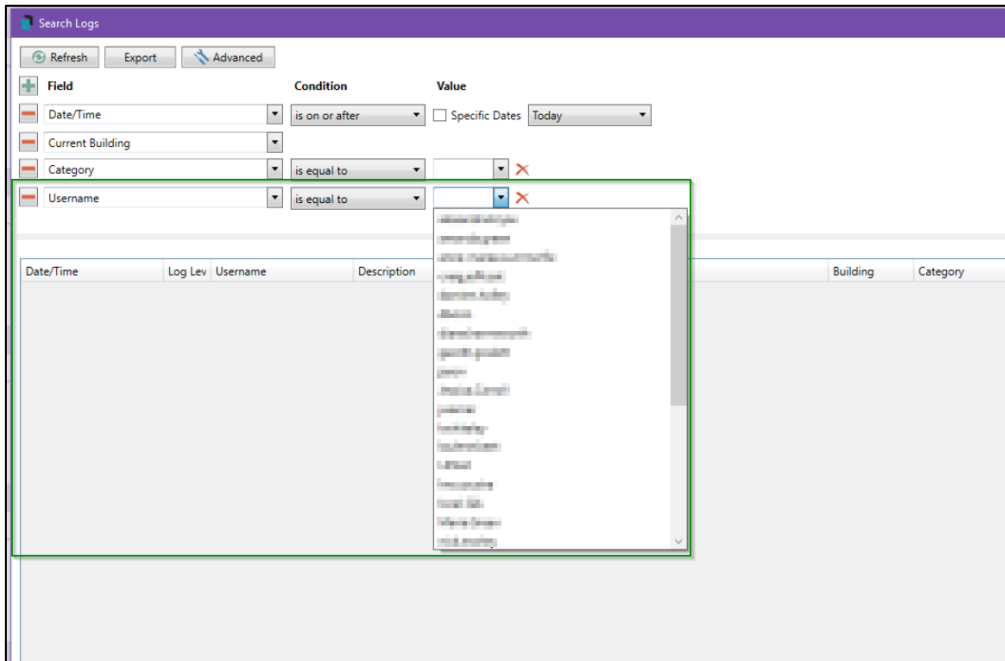
### Email Communication



## 5. Search Enhancements

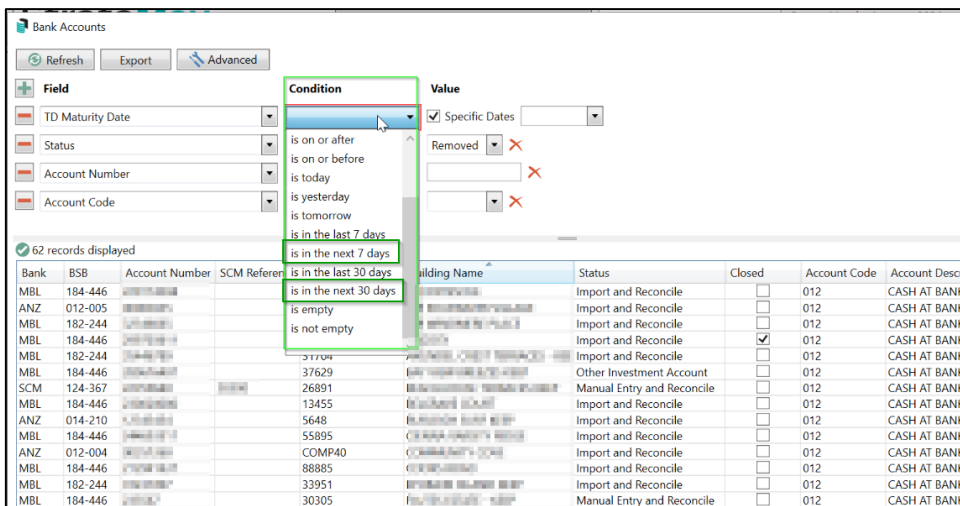
### 5.1 Log Viewer – Username value

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



### 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’



# 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.