

# Release Notes – Version 5.6.101

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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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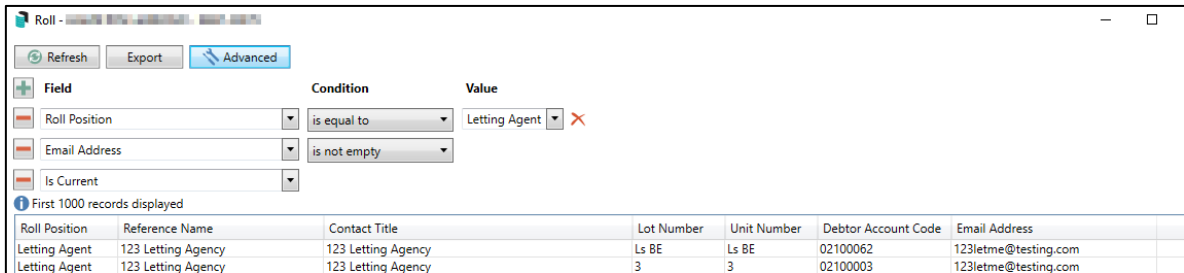
# What's New

## 1. Search Roll

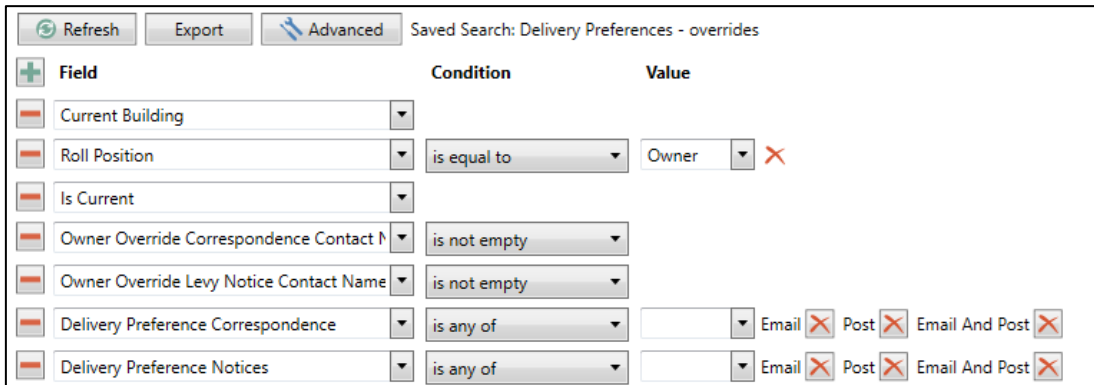
A new search has been created to search Roll contact details more easily and replaces the Owner Extract Report. Select 'Search Roll' to see the new search.

Data for Contacts for all Roll positions can be produced from information added in the Roll. Searches can be run for the currently selected building, multiple buildings or all buildings.

Example 1: To generate a Global list of Letting Agents with email addresses use the Roll Position filter to set Letting Agent and then set the Email Address filter to 'Is Not Empty'. Ensure Current Building is not set. The search will report all Letting Agents and their email addresses across all buildings.



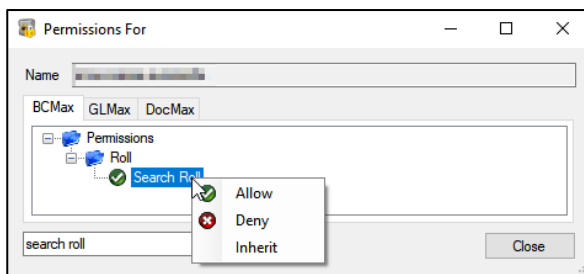
Example 2: To report owners that have delivery preferences set to go to Agent or Other, use the 'Owner Override Correspondence Contact Name' and/or 'Owner Override Levy Notice Contact Name'.



Searches can be saved by clicking Save Search As. The search can also be added to the Dashboard or exported to Excel.

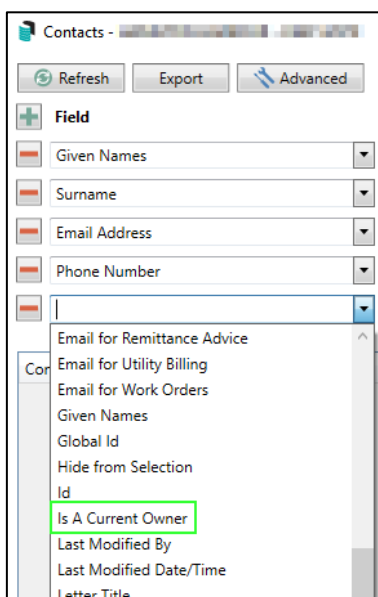
## 2. Security – Search Roll

A new security control has been added to support the new Search Roll. Navigate to Security, right click user or user group, and select permissions. Use the filter to search for 'Search Roll' permissions. Right click Search Roll and set to Allow, Deny, or Inherit as required.



## 3. Search Contacts – 'Is A Current Owner' – New Field

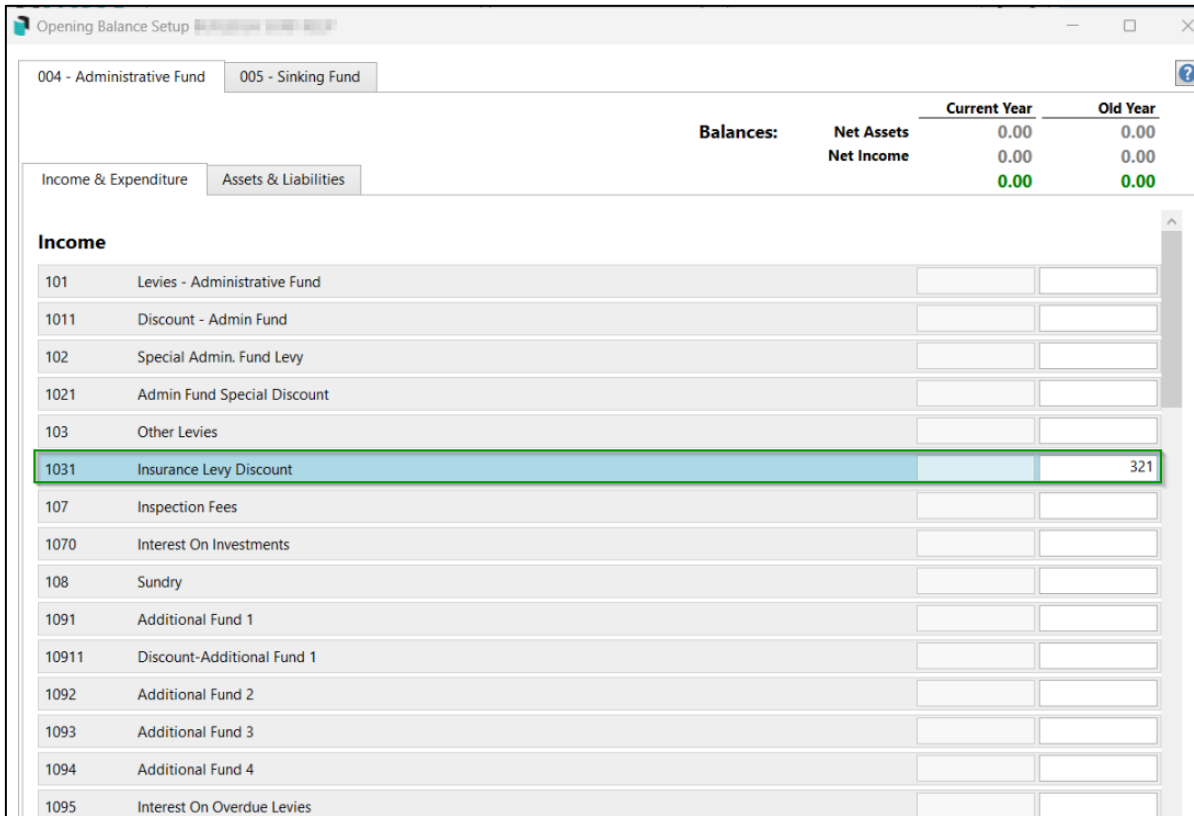
A new search field has been added to the Search Contacts Search. The field is called 'Is A Current Owner' and will allow contacts to be filtered by status as a current or non-current owner. Open Search Contacts, click Add and click the drop-down selector to set 'Is A Current Owner' field.



The field can be set to 'Yes' or 'No' and will filter based on the set option. The field will not be included by default but can be added as a search field or display column.

### 4. Opening Balance Setup– Enhancements

Enhancements have been carried out to the Opening Balance module. The system will now automatically highlight the line associated to the data entry the user is currently entering figures for. This will make it easier to identify the line the user is on to reduce the chance of error.

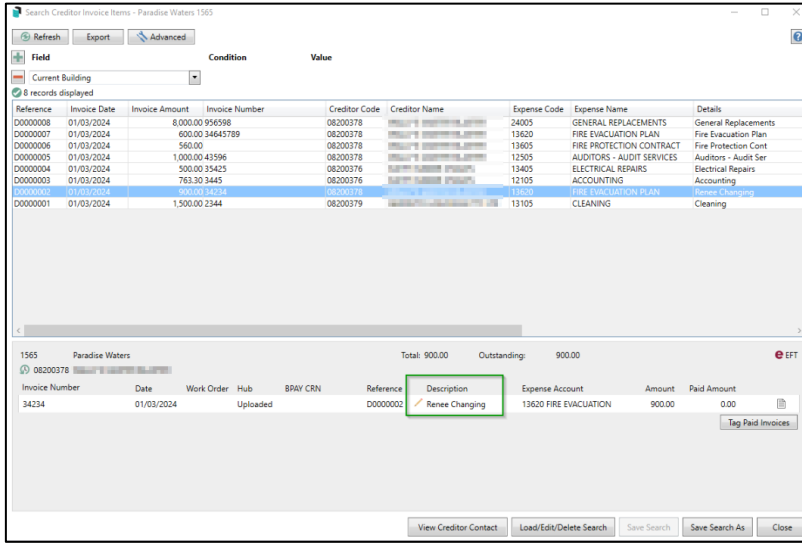


### 5. Creditor Invoices & Creditor Management – Edit Description

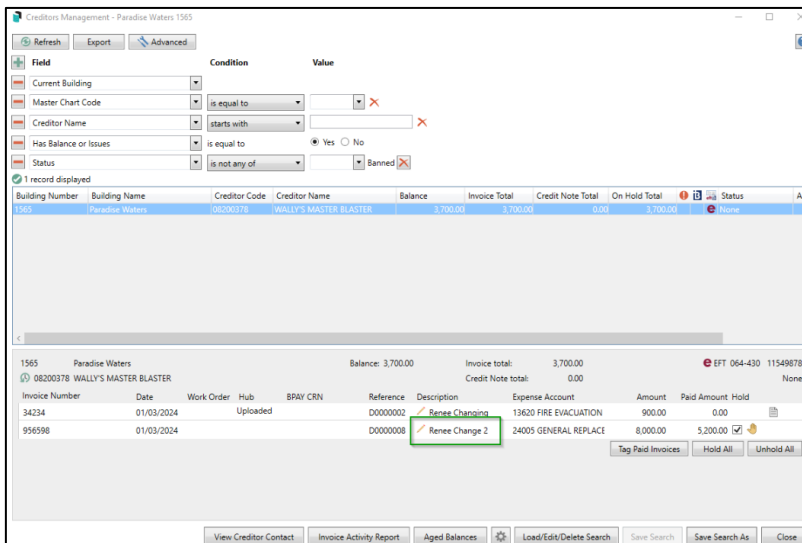
Users will now see an 'Edit' option in the UI of the following modules, which allows users with permissions to edit descriptions on Transactions.

- Search Creditor Invoice Items
- Creditor Management

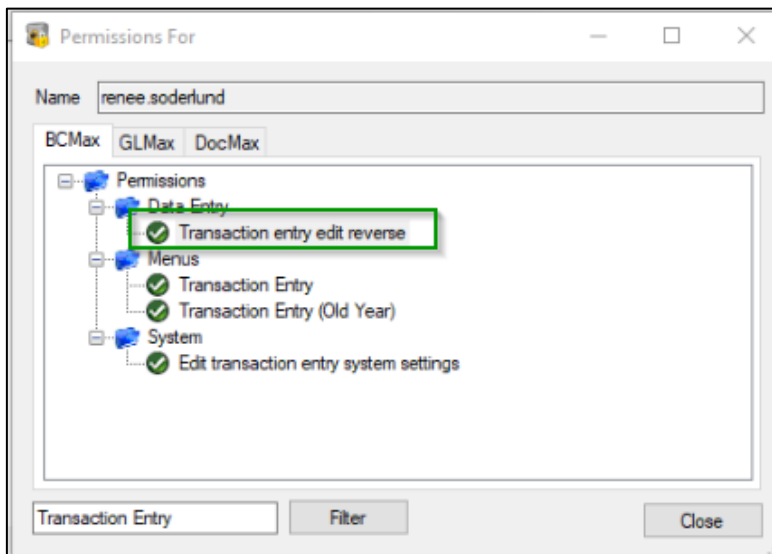
### Example of Creditor Invoice Items – Edit Option



### Example Creditor Management – Edit Option



Security that controls this option is 'Transaction Entry Edit Reverse'



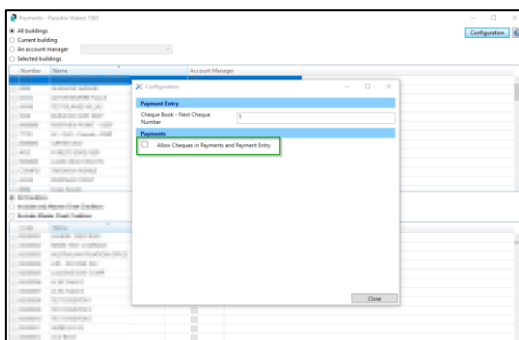
**Please note** – Permissions will not have to be granted to see the new Edit options (permission will be allowed by default) unless the security permission is already set to deny or allow).

## 6. New Configuration – Allow Cheques

### 6.1 Payments and Payment Entry – Allow cheques

A new setting is now available, to prevent cheques being raised by mistake due to the Pay by EFT setting not being ticked in Creditor Maintenance. This setting has been added for those Managers that do not want to make any payments via cheque.

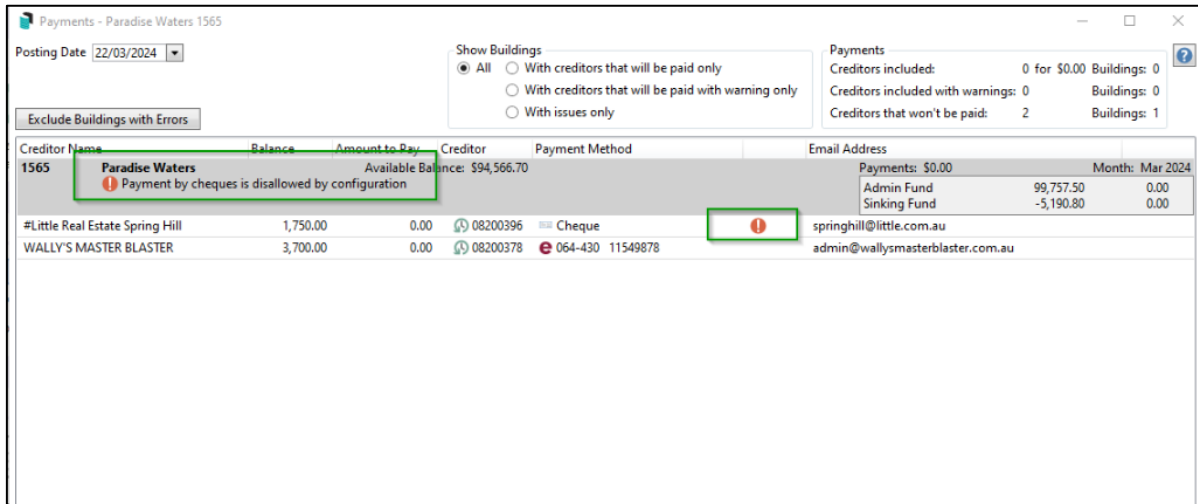
This new setting is available in Payments / Configuration 'Allow Cheques in Payments and Payment Entry'



If the setting is unticked, cheques cannot be processed via Payments and Payment Entry, therefore not available in Print Cheques. System will alert users in Payments that Cheques are disallowed and in Payment Entry Cheque options will be disabled.

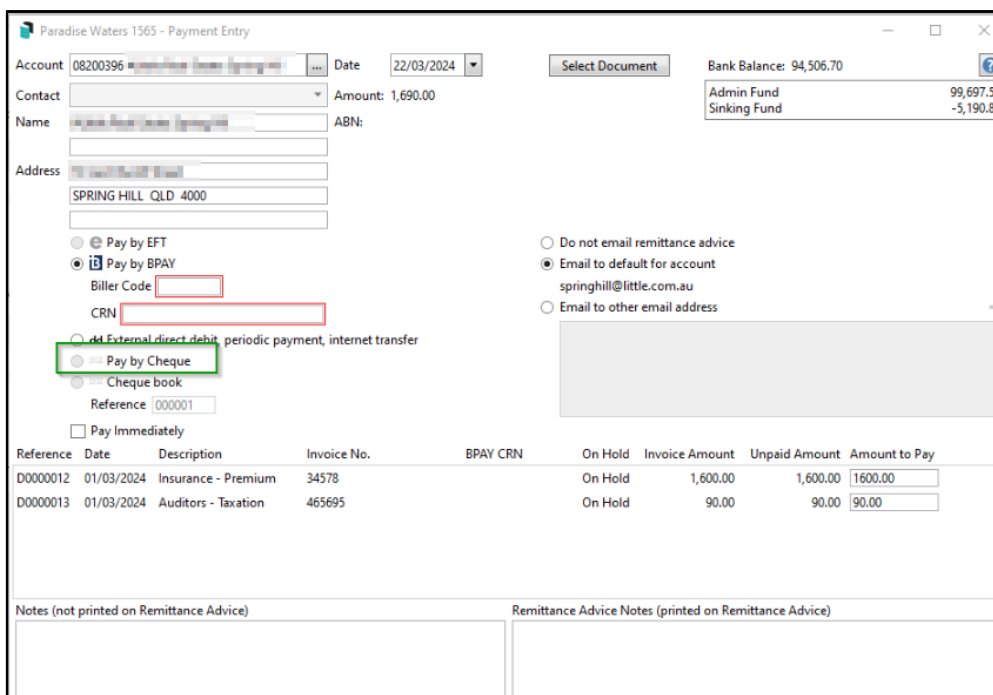
### Example – Payments module if setting is ‘Not Ticked’

Warning messages will appear alerting the users that the creditor will not be paid via cheque.



### Example – Payment Entry module if setting is ‘Not Ticked’

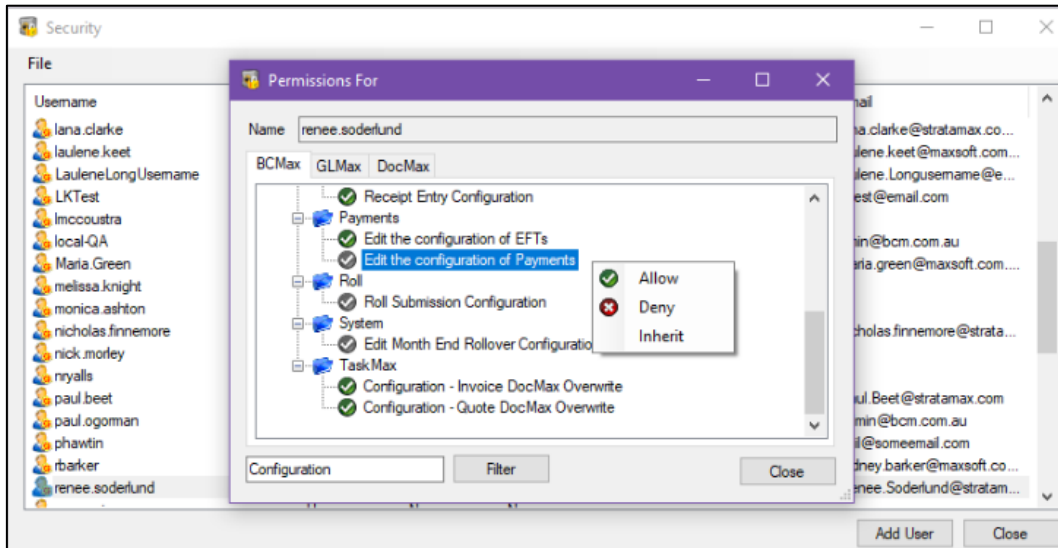
Pay by cheque is disabled





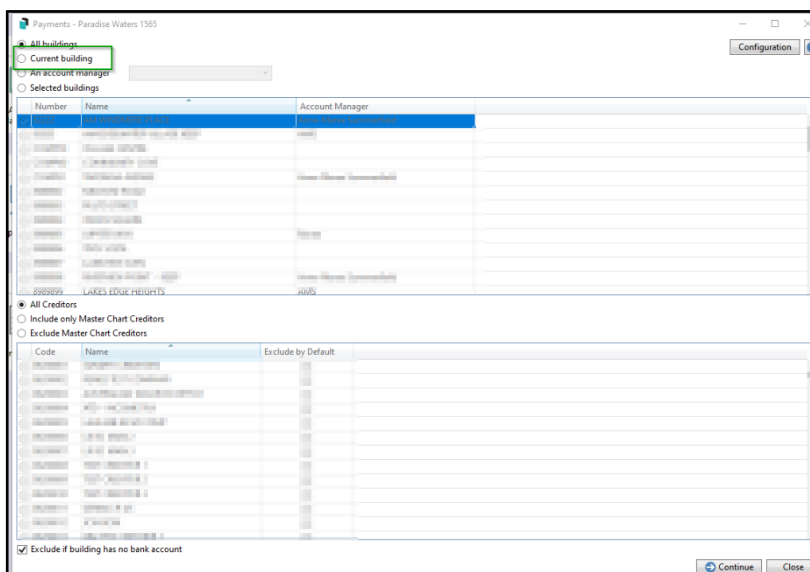
## 6.2 Security – Allow Cheques

New security permission for editing the Payments configuration is available 'Edit the configuration of Payments' which can be set as Allow, Deny, or Inherit.



## 7. Payments – Current Building selector

New option to select the 'Current Building' is now available in Payments. This will make it quicker for a user who wants to just make payments from the current building prior to entering the module.



Once selected and continue is pressed the current building only will be displayed with available invoices to process.

## 8. Payment Entry – Enhancements

When a debtor has more than one owner the system was defaulting to the first contact and unless the user changes the contact in the Payment Entry screen the payment was going only to the selected contact. This could lead to the incorrect owner receiving the funds into their bank account.

Enhancements have been made to no longer default the owners name in Payment Entry if there are multiple contacts for the lot. The user will now have to select the contact first before the other fields are populated. Name, Address, pay by, and email sections will be disabled until an account or lot debtor is selected.

**Please Note** – The remittance advice email address will pre-populate with the selected owner. If the user needs to send the remittance advice to multiple recipients, then email addresses can be entered manually.

Example – Payment Entry screen when no contact is selected for a lot with multiple owners

Expense Account	Invoice Code	Date	Description	Invoice No.	Amount	Fund
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Example – Payment Entry once a contact is selected. All available information for the contact will populate the fields.

Paradise Waters 1565 - Payment Entry

Account: 02100002 Renee Owner 1 & Renee Owner Date: 28/03/2024

Contact: Renee Owner 1 Amount: 0.00

Name: Renee Owner 1 ABN:

Address: 123 Street SOUTHPORT

Pay by EFT  
BSB: 012-006 Account Number: 32548965

Do not email remittance advice  
 Email to default for account owner1@test.com  
 Email to other email address

Expense Account	Invoice Code	Date	Description	Invoice No.	Amount	Fund
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Notes (not printed on Remittance Advice)

Remittance Advice Notes (printed on Remittance Advice)

Payment amount must be greater than zero

Add Refund Add Reimbursement Clear Save Close

# What's Better

- Roll – Change Ownership – Database timeout error was occurring when changing Roll Ownership which resigns an office bearer from the invoice hub approvers list.
- Financials – Non-Standard trading Fund Setups were not originally catered for. This has been resolved and financials will no longer crash when run in buildings where Trading Fund setup ranges are non-standard.
- Creditor Code Change – Payments table will now update when Code Change used to change a creditor code.
- Bank Account Setup – Select SCM Account – Index out of Range error was generating when importing SCM bank Accounts.
- Merge Letters – when users were importing a new document the system was creating an error, this has now been resolved.
- Account selection window – Cursor focus on Account Code search was not appearing in the search bar. This has now been resolved.
- Quote Searches – Results will no longer show as duplicated in the result set.
- Roll – Change of Ownership – is no longer selecting the new owner recipient. This has now been resolved.

**Please note** – previous changes to the UI to include a recipient All or None has now been removed from the Report Distribution UI until further notice. But the new option will still be available in Communications when selecting Recipients,

- EFT Manager – Email Remittance Advice to debtor with two owners with the same email address was crashing, this has now been resolved.
- EFT Manager – Where a lot has multiple owners the system was sending Remittance Advices to all available email addresses for the multiple owners for the one lot. This has now been enhanced to only sent remittance advice via email to the contacts email address that is automatically populated into Payment Entry or any manually entered email addresses.
- EFT Manager – The UI will only display the email address for the selected Contact where there are multiple owners attached to the lot.