# Release Notes – Version 5.6.107

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





Wha	ťs New	3
1.	Contact Management – Merge Contact View	3
2.	New Debtor Searches	4
2.1	Local Debtors	4
2.2	Global Debtors	5
2.3	Security Local Debtors and Global Debtors	5
3.	Creditor Searches Enhancements - Master Chart Status	6
3.1	Search Creditors	6
3.2	Creditor Management	7
4.	New Search – Account Codes	8
4.1	Search Local Accounts	9
4.2	Search Global Accounts	9
4.3	Security- Search Local Accounts and Global Accounts	. 10
Wha	t's Better	11

# What's New

# 1. Contact Management – Merge Contact View

The Merge Duplicate Contacts View has been enhanced to include the ability to see contact data fields which can then be compared.

Fields available in the view include:

- Contact Title
- ABN
- Bank Account Details
- Email Address
- Last Activity Date
- Notice Address
- Committee in Buildings
- Roll In Buildings
- Creditor In Buildings
- Given Name
- Surname

Navigate to Contact Management and select Merge Duplicate Contacts, then select a duplicate record to see the changes. Differences between the duplicates can now be viewed in this screen to assist in determining the correct contact to keep.

ſ	Merge Cont			contact to Keep, and v to the Kept contact.	which contact	s will be Delete	d. Referenc	es to the Deleted conta	ect will be		
	ABN 73254114573										
	Merge Actio	on	ld	Title	ABN	Given Names	Surname	Email	Phone Numbers	BSB	Bank
	lgnore 🗡	0	3498462	A NEW TENANT	73254114573			newtenant@test.com	111 111 111,0403 040 311,222 222 222	014-518	585478555
ш	lgnore 🐣	0	3542219	AMS MANAGEMENT	73254114573			amstesting@test.com			

Creditor Last Activity	Creditor in Buildings	Roll in Buildings	Committee in Buildings	Address	Notice Address
	0000		-	PO Box 2115 Kardinya WA 6163	
	0000,42979			1235 The Avenue Bridgetown QLD	

## 2. New Debtor Searches

New search functionality has been added to search Debtors, including roll and second debtors for BCMax. These enhancements will allow users to search for debtors more efficiently.

The debtor searches will include lot and unit numbers second debtors and are also available for subgroups.

Please Note - GLMax debtor searches will be available in future releases.

## 2.1 Local Debtors

The Local Debtors search can be used to search local debtors (including Second Debtors and Subgroups) in a selected building. This search will report all information in relation to the Debtor. There are a range of different fields that users can report on, examples of some of the fields available are shown below:

<b>0</b> 6	ical Debtors - Renee Utilties Building KEEP 60	179											×
۲	Refresh Export 📏 Advanced												0
+	Field		Condition	Value									
-	Reference Name	٠	starts with			×							
-	Given Names	٠	starts with			×							
-	Surname	٠	starts with			×							
-	Lot Number	٠	starts with	1	×								
-	Unit Number	٠	starts with		×								
		•											
	Contact Last Modified By Contact Last Modified Date/Time	ì	Contact Title			Lot Number	Unit Number	Surgrame	Given Names				
0210	Contact Title		Mr Thomas Moore			1	1	Moore	Thomas				
	Contact Type		RENEE CHANGING			10	10	Moore	inomas				_
	Debtor Code												
	Delivery Preference Correspondence												
	Delivery Preference Notices												
	Delivery Preference Notices Delivery Preference Utility Billing												
	Derivery Preference Utility billing Do Not Charge Interest												
	Do Not Charge Interest Email Address												
	Email for Committee Correspondence	ъ											
	Email for Correspondence												
	Email for Invoice Hub												
	Email for Levy Notice												
	Email for Remittance Advice												
	Email for Utility Billing												
	Email for Work Orders												
	Given Names	~											
							Edit	Load/Edit/Delete Search		Save Sea	wch As	Ck	se

#### Example of Lot Number search

		_						
🛞 Refresh	Export 🔨 Advanced							
+ Field		Condition	Value					
- Lot Num	per	<ul> <li>starts with</li> </ul>	• 1	X				
Given Na	mes	<ul> <li>starts with</li> </ul>			×			
- Surname		<ul> <li>starts with</li> </ul>			×			
Lot Numi	ber	<ul> <li>starts with</li> </ul>		×				
- Unit Nun	ber	<ul> <li>starts with</li> </ul>		×				
5 records d	splayed							
Debtor Code	Reference Name	Contact Title			Lot Number	Unit Number	Surname	Given Names
02100001	RAMINUM MININA V	Which Reneumbro			1	1		
02100010	MURCOMULT IVI.	Marconell Phy Ltd			10	10		
02100011	PRESS	Indicate Londy File			11	11		
02100012	APORABE	Mr Drive Peter Alberta			12	12	Ahme	Brian Peter
02100012	AUTORAL 11	And in the states			12	12	Alama	And inc.

Example of Unit Number search

Refresh Export Advance	ed			
🕂 Field	Condition	Value		
Unit Number	▼ starts with	• 2 ×		
Given Names	▼ starts with	•	×	
Surname	▼ starts with	•	×	
Lot Number	▼ starts with	• ×		
Unit Number	<ul> <li>starts with</li> </ul>	• ×		
1 record displayed				
Debtor Code Reference Name	Contact Title		Lot Number	Unit Number
02100002 PUBDIC P	Claim Peneloge Res	-	2	2

## 2.2 Global Debtors

The Global Debtors search can be used to search debtors (including second debtors and subgroups) globally across the portfolio. This search will report all information in relation to the Debtor. There are a range of different fields that users can report on, examples of some of the fields available are shown below:

	ilobal Debtors - Renee Utilties Building KEEP									) <del>-</del> (B	
-	Refresh Export Advanced		Condition		Value						
÷			Condition	_	Value						
-	Reference Name	٠	starts with	•			×				
-	Given Names		starts with				×				
-	Sumame		starts with				×				
-	Lot Number	•	starts with		1	×					
-						×					
-	Unit Number	٠	starts with	•		×					
-		-									
	ABN	1									
	Account Manager		Debtor Code	Reference	Name		Contact Title	Lot Numb	er Unit Number	Surname	
74	ACN		02100001	Test Comp	any Pty Ltd		Test Company Pty Ltd	1	1		
74	Address Title 1			Test Comp			Test Company Pty Ltd	10	10		
74	Address Title 2			Test Comp			Test Company Pty Ltd	11	11		
74					any Pty Ltd		Test Company Pty Ltd	12	12		
74	bank Account Number				any Pty Ltd		Test Company Pty Ltd	13	13		
74	828				any Pty Ltd		Test Company Pty Ltd	14	14		
74	Building Name				any Pty Ltd		Test Company Pty Ltd	15	15		
74	Building Number				any Pty Ltd		Test Company Pty Ltd	16	16		
	Contact Last Modified By			Test Comp			Test Company Pty Ltd	17	17		
	Contact Last Modified Date/Time				any Pty Ltd		Test Company Pty Ltd	18	18		
74					any Pty Ltd		Test Company Pty Ltd	19	19		
55	Contact libe			rest comp			rest company Pty Ltd	1	19		
	Contact Type		02100002	11175-7018			Name (in the	1			
35	Current Building		02100001	1			suger Agent.	1	1		
37	Debtor Code		02100001		I IS REPORTED IN		In such discontinuous off	10	10		
	Delivery Preference Correspondence		02100010		or Contrast Real		Section over Content Inst	11	11	Contact Test	
				N. LOLAS			N All and a	12	12	Contact lest	
35	Delivery Preference Notices				COLUMN ADDRESS		The Islands start start	12	13		
35	Delivery Preference Utility Billing	$\times$			de Marcalante		in it in the basis of the	14	14		
35			02100015		NAMES OF ADDRESS	P	Name and Address of the Owner, or other	15	15		
35) 35)				Louis and			Constitute Departs	15	16	0	
							a long land	10		Reports	
35			03100001	and the second			And Statements in the International State		1		
17									101		
17			2 02100010	8.000 IN			Descriptions Key	10	110		
											- 3

# 2.3 Security Local Debtors and Global Debtors

Security permissions are available for the Local Debtors and Global Debtors. Navigate to Security/Edit Permissions.

### Local Debtors

Permissions for renee.soderlund	_		×
Local			×
BCMax GLMax DocMax			
Permissions Menu			
Search Local Accounts Local Debtors Cocal Transactions			
		Clo	se

#### **Global Debtors**

Permissions for renee.soderlund	_		$\times$
Global Deb			×
BCMax GLMax DocMax			
<ul> <li>Permissions</li> <li>Menu</li> <li>Global Debtors</li> </ul>			
		Clo	6

# 3. Creditor Searches Enhancements - Master Chart Status

A Master Chart status column has been added to Creditor and Creditor Management Searches.

#### 3.1 Search Creditors

Master Chart Status is now available in the Creditor Search with filter values:

- Not in Master Chart
- Different to Master Chart
- Different Code

See Examples below:

#### Not in Master Chart:

💿 Refresh	Export Advanced								
Restrict To	Field		Condition	Value					
Columns	Current Building	•							
Sort Order	Creditor Code	•	starts with	-	×				
Sont Order	- Creditor Name	•	starts with	•	×				
Advanced	Master Chart Status	•	is equal to	Not in Master C	art 💌 🗙				
168 records o	displayed								
reditor Code	Creditor Name	Telephone	Master Chart S	tatus Status	ABN	Balance	On Hold Total		
3200715	UNITY WATER		Not in Master O	hart None	8979171	7472 0.00	0.00		
3201680	CSTM SOUND BODY CORPORATE		Not in Master C		e 9615461				
3200144	AUSTRALIAN TAXATION OFFICE		Not in Master C		e	0.00			
3200461	NATURAL PEST CONTROL		Not in Master (		e 3298590				
3202132	BDSA BUILDING DEPRECIATION S		Not in Master (		e 6410797				
3200332	CHU UNDERWRITING AGENCIES		Not in Master C		e 1800158				
3200352	BODY CORPORATE BROKERS		Not in Master C		9500280				
8201419	BRUFF PAINTING CONTRACTORS		Not in Master C		e 9679351				
8201802	INSIDE OUT LEGAL SERVICES		Not in Master C		e 6721996				
8200039	BILLABONG POOL SERVICE		Not in Master C		e 6301004				
3200033	SUTTONS CLEANING		Not in Master C		C 0001004				
3200033	EIREVAC SERVICES PTY ITD	1300 387 387	Not in Master (		e 5209688				
3200406	DNUPAUL MATTERS ELECTRICAL		Not in Master (		e 9710066				
3200359	WINDOW PRO		Not in Master (		e 2707798				
3200092	DNU SC GLASS & ALUMINIUM		Not in Master (		5719652				
8200072	DNU NOOSA WHOLESALERS		Not in Master C		<b>e</b> 9640707				
8201135	LAGUNA ELECTRICAL SERVICESP		Not in Master C		e 8510536				
3200280	COAST & HINTERLAND LOCKSMI		Not in Master C		C 7915633				
3202442	SPOT ON HOSPITALITY	0421 566 330	Not in Master C		e 612468				
3202015	ORIGIN ELECTRICITY ACCOUNT	0.2. 000 000	Not in Master C		e 3307105				
3202594	GYMWORKS		Not in Master C		e 3110908				
3200493	GAMLIN ROOFING		Not in Master (		e 6606603				
3200940	OTIS ELEVATOR COMPANY PTY L		Not in Master (		C 5600281				
201910	O I A GROUP		Not in Master (		e 2711610				
200005	NOOSA COUNCIL		Not in Master C		9796921				
3201729	SIMPLY COOL		Not in Master C		e 601113				
3202550	THE ORCHID GROUP PTY LIMITEL		Not in Master (		e 2800372				
8200757	PRIDE ELECTRONICS SEC SYSTEM		Not in Master C		C 2000572				

#### Matches Master Chart:

Search Credi	itors	1.00						-		×
🛞 Refresh	Export Advanced									?
Restrict To	Field		Condition	Value						
Columns	Current Building	•								
Sort Order	Creditor Code	*	starts with 🔻		×					
	Creditor Name	•	starts with 💌		×					
Advanced	Master Chart Status	•	is equal to 🔹	Matches Master C	hart 💌 🗙					
2 records dis				_						
Creditor Code		Telephone	Master Chart Statu		ABN		On Hold Total			
08200001 08285767	SUNDRY CREDITORS ALL CLEAR ABSEIL & PROP		Matches Master Cl Matches Master Cl		e 43242705437	0.00	0.00			
			View Credito	r Contact Sear	rch Invoice Items	ad/Edit/Delete Search	Save Search	Save Search As	Clo	ose

### Different Code:

Search Cred	itors -					0				-		×
Refresh		Export Advanced										0
Restrict To	+	Field			Condition	Value						
Columns	-	Current Building		٠								
Sort Order	-	Creditor Code		٠	starts with	×						
	-	Creditor Name		•	starts with		×					
Advanced	-	Master Chart Status		٠	is equal to 🔹	Different Code 💌 🗙						
1 record disp							1000					
Creditor Code 08200002		ditor Name DY CORP MANAGER	Telephone 07 5566 8855		Master Chart Status Different Code	s Status None	ABN e 520976074		On Hold Total 0.00			
					View Creditor	Contact Search Inv	voice Items	Load/Edit/Delete Search	Save Search	Save Search As	Cic	ise

# 3.2 Creditor Management

Master Chart Status is now available in Creditors Management with filter values:

- Not in Master Chart
- Different to Master Chart
- Different Code

#### See Examples below:

<ul> <li>Refresh</li> <li>Restrict To</li> <li>Columns</li> <li>Sort Order</li> </ul>	Export Advanced								
Columns									?
			Condition	Value					
Sort Order	Current Building	•							
Soft Order	Creditor Name	•	starts with 🔹		×				
Advanced	Has Balance or Issues	•	is equal to	Yes O No     Banned X					
	Master Chart Status	•	is not any of	Not in Master Chart					
6 records disp			is equal to	Not in Master Chart					
Building Numbe		Creditor Code		Matches Master Chart Different Code	Balance	Invoice Total	Credit Note Total		0 🖪 🚟
6417 6417 6417 6417 6417	NOOL IN THE BOARD P NEEDLINE TO BOARD P NOOL IN THE BOARD P NOOL IN THE BOARD P NOOL IN THE BOARD P	08201680 08200039 08200013 08200359 08200940	CSTM SOUND BODY CORI BILLABONG POOL SERVICE SUTTONS CLEANING WINDOW PRO		38.50 67.10 198.00 693.00 1.125.66	38.50 67.10 198.00 693.00 1.125.66	0.00 0.00 0.00	0.00 0.00 0.00	e
6417	NOOL IN THICK HEP	08205712	NOOSA WHOLESALERS Q	LD PTY Not in Master Chart	369.05	369.05	0.00	0.00	e
<									>
		View Creditor	Contact Invoice Activit	Aged Balances	Load/Edi	t/Delete Search	Save Search	ave Search As	Close

## 4. New Search – Account Codes

New searches have been created, Search Local Accounts and Search Global Accounts. These searches allow users to search a displaying of account codes

The below fields are some of key fields available to filter by:

- Building
- Account Code Number
- Account Code Description
- Master Chart Description
- Last Activity Date in Building
- Filter by hidden so can be excluded if needed
- Filter to show if Local Name does not match Master Name

**Please Note:** Creditors and Debtors will not be included in these searches; they can be queried through their own searches.

### 4.1 Search Local Accounts

Seach Local Accounts can be used to search account codes in the selected local building.

Example of Search L	ocal Accounts
---------------------	---------------

-										
Refresh	Export 🔧 Advanced	Save	ed Search: Local Search							
Field		C	Condition	Value						
Account Co	ode	▼ is	s equal to	•	×					
<ul> <li>Description</li> </ul>	1	• 5	starts with	-	×					
Master Cha	art Status	▼ is	s equal to		• ×					
Hide For Se	election	▼ is	equal to	O Yes	O No					
Last Activit	у	▼ is	s on	- 🗆 Spec	ific Dates	•				
Master Cha	art Description	• s	starts with		×					
101 records o	lisplayed									
Account Code	Description		Account Group		Master Chart Status	Master Chart Description	Hide For Selection	Last Activity	System Flag	0
04	ADMINISTRATIVE FUND				Matches Master Chart	ADMINISTRATIVE FUND		31/03/2022	None	
05	SINKING FUND				Matches Master Chart	SINKING FUND			None	
06	TRANSFERS				Matches Master Chart	TRANSFERS			None	
0701	CUSTOM 1 FUND				Different Description	ADDITIONAL FUND 1			None	
011	CASH ON HAND				Matches Master Chart	CASH ON HAND			None	
012	CASH AT BANK				Matches Master Chart	CASH AT BANK		18/01/2022	None	
015	LOAN TO ERC				Not in Master Chart				None	
0220	LEVIES BILLED NOT YET DUE				Matches Master Chart	LEVIES BILLED NOT YET DUE			Levies Billed Not Yet Due	
0220001	LEVIES BILLED NOT DUE				Matches Master Chart	LEVIES BILLED NOT DUE			Generated Levies Billed Not Due	
0220002	LEVIES - PREPAYMENTS				Matches Master Chart	LEVIES - PREPAYMENTS			Generated Levies Paid In Advance	
0224	INTEREST ON OVERDUE LEVIES				Not in Master Chart				None	
2800000	TRANSFER ACCOUNT				Not in Master Chart				None	
030	SUNDRY DEBTORS				Matches Master Chart	SUNDRY DEBTORS			None	
032	REFUND CLEARING ACCOUNT				Not in Master Chart			10/12/2021	None	
034	ELECTRICTY ARREARS				Not in Master Chart			01/01/2022	None	
035	ELECTRICITY ARREARS				Not in Master Chart			18/04/2022	None	
040	FIXED ASSETS				Matches Master Chart	FIXED ASSETS			None	
043	SECONDARY DEBTORS				Not in Master Chart			08/03/2022	None	
160	SECURITY DEPOSIT				Different Description	ELECTRICITY SECURITY DEPOSIT		17/01/2022	None	
061000	GST CLEARING ACCOUNT					GST CLEARING ACCOUNT		18/04/2022	GST Clearing	
61001	WITHHOLDING TAX ACCOUNT					WITHHOLDING TAX ACCOUNT			Withholding Tax	
61002	PAYS CLEARING ACCOUNT					PAYG CLEARING ACCOUNT			PAYG Clearing	
163	TRANFERS ACCOUNT				Not in Master Chart	And Contains Account		02/12/2021	None	
164	LOAN FROM ERC				Not in Master Chart			02/12/2021	None	
2	COART I NOW ENC				Not in Master chart		H		···	
										_

## 4.2 Search Global Accounts

Seach Global Accounts can be used to search account codes globally.

Restrict To	+	Field		Condition	Value					
Columns	_	Building Number	•	is equal to 🔹			• ×			
Sort Order	-	Account Code	•	is equal to 👻		×				
Sort Order	-	Description	•	starts with 💌		×				
Advanced	-	Master Chart Status	•	is equal to 👻		• ×				
	-	Account Code	•	starts with 🔹	12	×				
First 1000 ree	cords	displayed								
Building Numb	ber	Building Name	Account Code	Description		Master Chart Status	Master Chart Description	Last Activity	Hide For Selection	Syste
100		ALL ROOM AND	121	AUDIT FEES		Different Description	FUNDS TRANSFERS			None
		And in case of the local division of the loc	121	AUDIT FEES		Different Description	FUNDS TRANSFERS	07/07/2023		None
		Contract of the local division of the local	121	AUDIT FEES		Different Description	FUNDS TRANSFERS			None
100		STATES AND ADDRESS OF	121	AUDIT FEES		Different Description	FUNDS TRANSFERS			None
		STATISTICS AND ADDRESS. STATISTICS.	121	AUDIT FEES		Different Description	FUNDS TRANSFERS	26/03/2020		None
1.00		Territor Territoria	121	AUDIT FEES		Different Description	FUNDS TRANSFERS		~	None
		Party and a party of the	1210	ELECTRICITY PAID OUT		Not in Master Chart		30/06/2022		None
100		and the second second	1210	ELECTRICITY PAID OUT		Not in Master Chart		30/09/2022		None
		et and the share of the		A/C - CONTRACT		Not in Master Chart		14/12/2022		None
			1210	SEC FEES - NON CONTRA		Not in Master Chart			<b>V</b>	None
100		The second second	12100	BASIC PAYROLL SERVICES		Not in Master Chart		05/07/2016		None
Canada and		PERCEPTION OF ALL YOR		MANAGEMENT FEES OC 1		Not in Master Chart		17/12/2020		None
			121002	MANAGEMENT FEES OC 2	-	Not in Master Chart		14/08/2020		None
		NEOCONSCIENCE NO - CE	121003	MANAGEMENT FEES OC 3		Not in Master Chart				None
			121004	MANAGEMENT FEES OC 4		Not in Master Chart				None
-		NUMBER OF STREET		MANAGEMENT FEES OC 5		Not in Master Chart				None
		PERCENT AND A 17 YO	121006	MANAGEMENT FEES OC 6	5	Not in Master Chart			<u> </u>	None
and the second second		CONTRACTOR OF A 1 AND		MANAGEMENT FEES 1		Not in Master Chart				None
		The start of the second se	12101	OWNER/C'TEE LIAISON		Not in Master Chart			<b>v</b>	None
		NUMBER OF STREET		MANAGEMENT FEES 2		Different Description	FUNDS TRANSFERS 2		H	None
		A CONTRACTOR OF A CONTRACT	12105	ACCOUNTING		Matches Master Chart Matches Master Chart			H	None
		and the second second	12105	ACCOUNTING						None
		And a state of the second second	12105	ACCOUNTING		Matches Master Chart Matches Master Chart		00/00/0001		None
		An other states of the second states of the	12105	ACCOUNTING				09/09/2021		
		Revised and the second	12105	ACCOUNTING		Matches Master Chart	ACCOUNTING			None

Example of Search Global Accounts

## 4.3 Security- Search Local Accounts and Global Accounts

Security permissions are available for the Search Local and Global accounts. Navigate to Security/Edit Permissions.

#### Search Local Accounts

Permissions for renee.soderlund	_		$\times$
Search Local			×
BCMax GLMax DocMax			
Permissions     Menu     Search Local Accounts			
		Clo	se

#### Search Global Accounts

Permissions for renee.soderlund	-		×
Global Acc			×
BCMax GLMax DocMax			
Permissions     Menu     Search Global Accounts			
		Clo	se

# What's Better

- Financials Export Report Back Dated Report YTD Budget was showing Current Month YTD Budget this has been fixed.
- Certificates/Disclosure Statement Levies were outputting by Reference Number rather than Due Date/Period. This has now been resolved.
- Help Links The Help Link on combined screens has been enhanced to show more relevant links, for example Debtor Maintenance (Certificate Applicants) and Interactive Reports (Dashboard) now show the correct links.
- Roll Deleting/Reverting prior ownership where the termination date and withdraw date do not match has now been resolved.
- Account Maintenance an update code could not be selected for an account that was marked as System Code (Overdue Interest) This has now been allowed.
- Payment Management When reprinting an EFT Remittance advice using Payments Management to email with a signature it was outputting the signature twice in the email. This has now been resolved.