

# Release Notes – Version 5.6.107

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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. 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.

<b>Merge Contacts</b>									
Choose 1 contact to Keep, and which contacts will be Deleted. References to the Deleted contact will be changed to the Kept contact.									
ABN 73254114573									
Merge Action	Id	Title	ABN	Given Names	Surname	Email	Phone Numbers	BSB	Bank
Ignore	3498462	A NEW TENANT	73254114573			newtenant@test.com	111 111 111,0403 040 311,222 222 222	014-518	585478555
Ignore	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

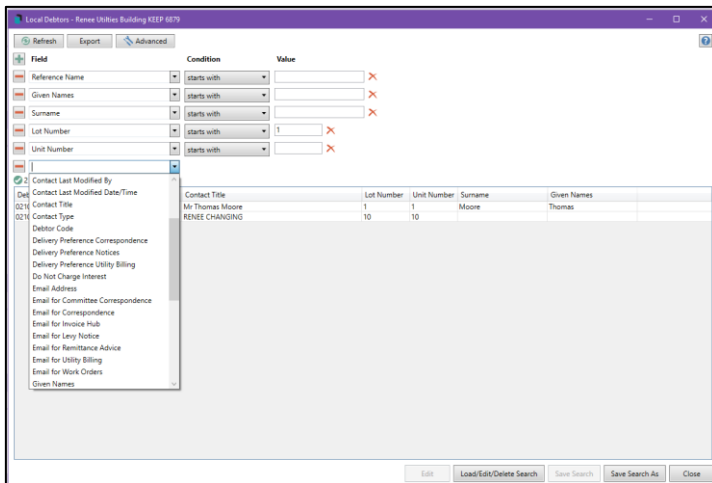
New search functionality has been added to search Debtors, including roll and second debtors for BCMax. These enhancements will allow users to search for debtors more efficiently.

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

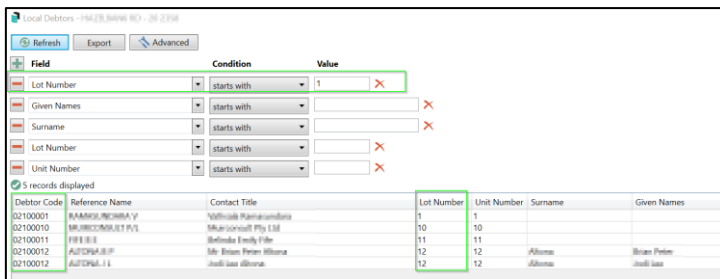
**Please Note** – GLMax debtor searches will be available in future releases.

### 2.1 Local Debtors

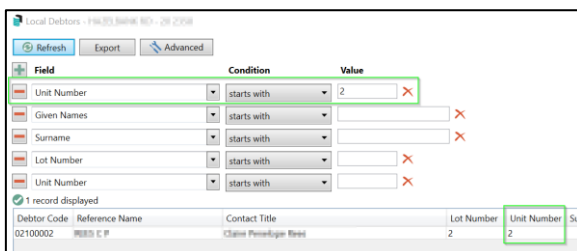
The Local Debtors search can be used to search local debtors (including Second Debtors and Subgroups) in a selected building. This search will report all information in relation to the Debtor. There are a range of different fields that users can report on, examples of some of the fields available are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



Example of Lot Number search

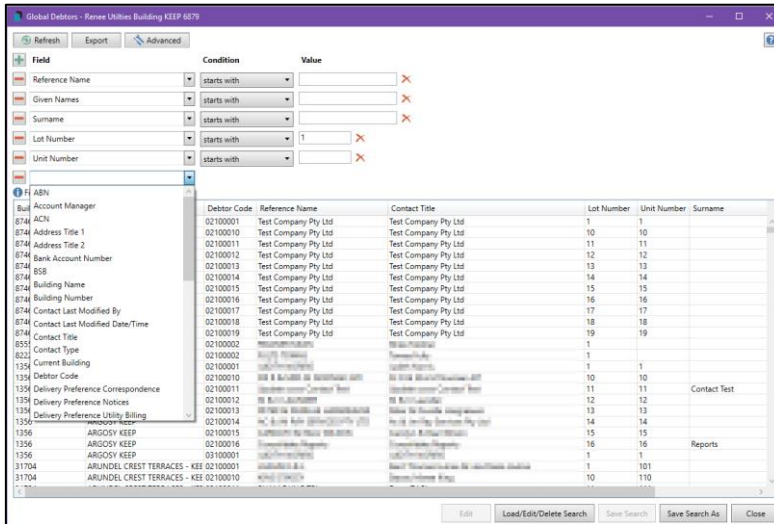


Example of Unit Number search



### 2.2 Global Debtors

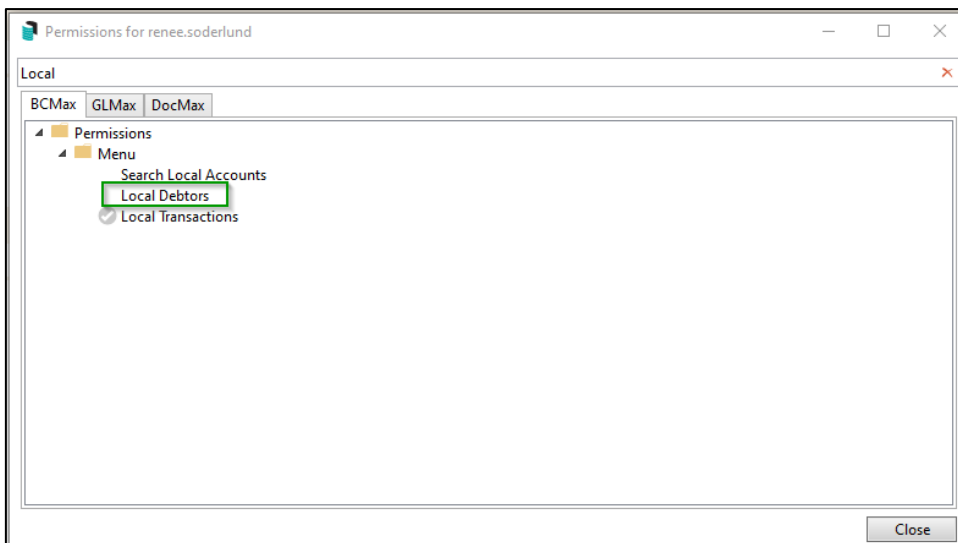
The Global Debtors search can be used to search debtors (including second debtors and subgroups) globally across the portfolio. This search will report all information in relation to the Debtor. There are a range of different fields that users can report on, examples of some of the fields available are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



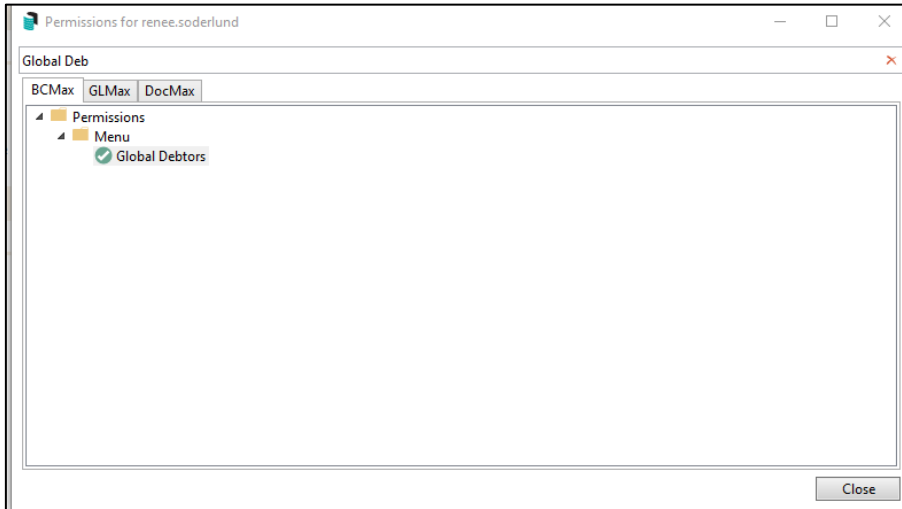
### 2.3 Security Local Debtors and Global Debtors

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

#### Local Debtors



## Global Debtors



### 3. Creditor Searches Enhancements – Master Chart Status

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

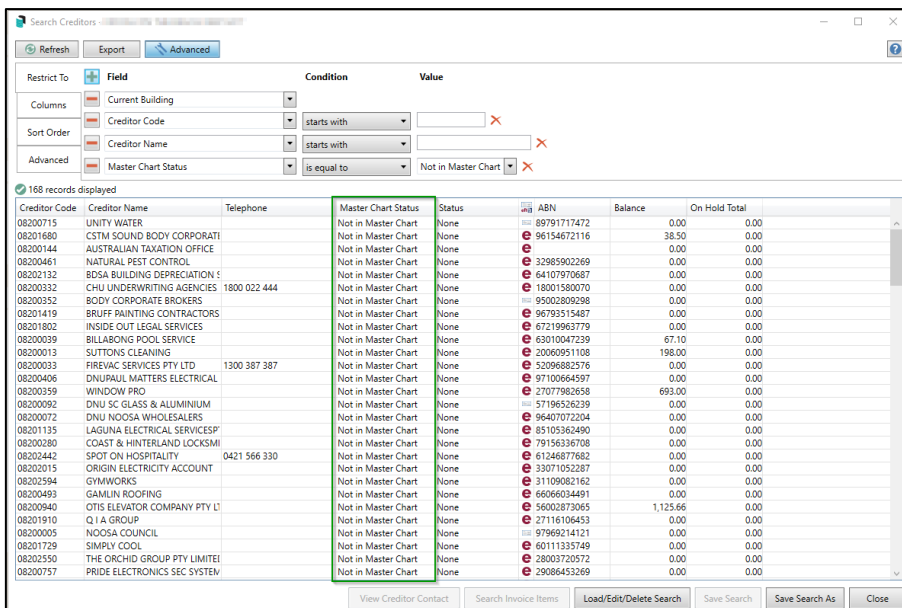
#### 3.1 Search Creditors

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

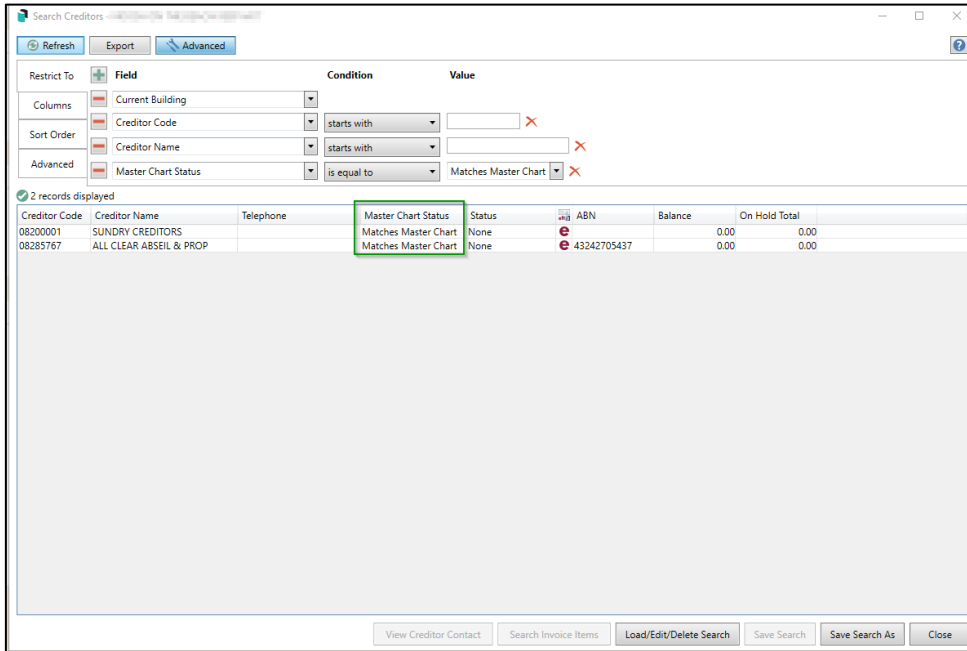
- Not in Master Chart
- Different to Master Chart
- Different Code

See Examples below:

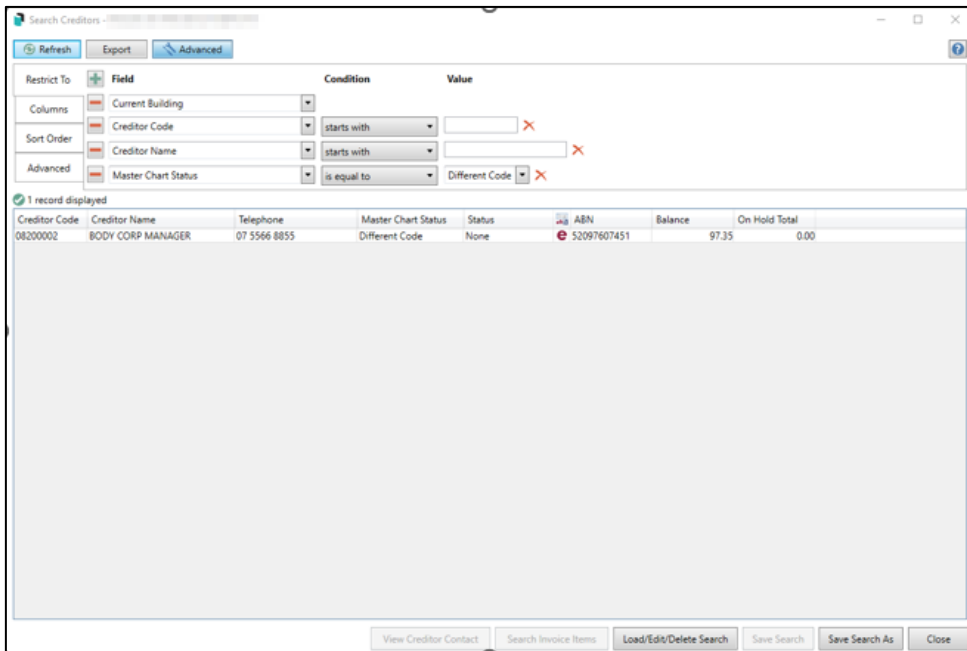
Not in Master Chart:



### Matches Master Chart:



### Different Code:

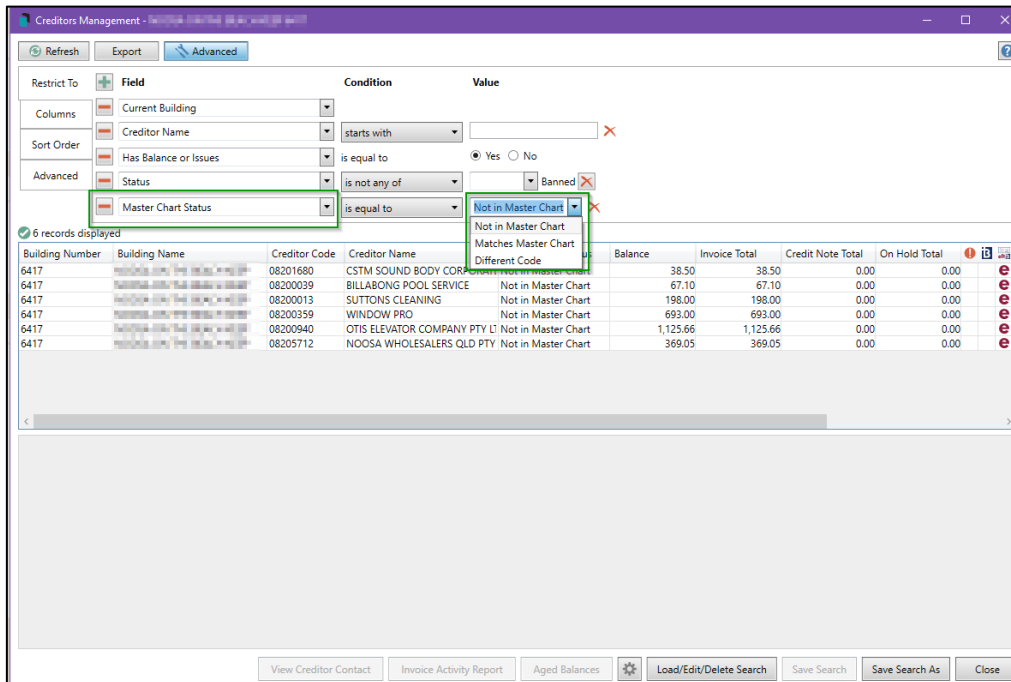


## 3.2 Creditor Management

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:



#### 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

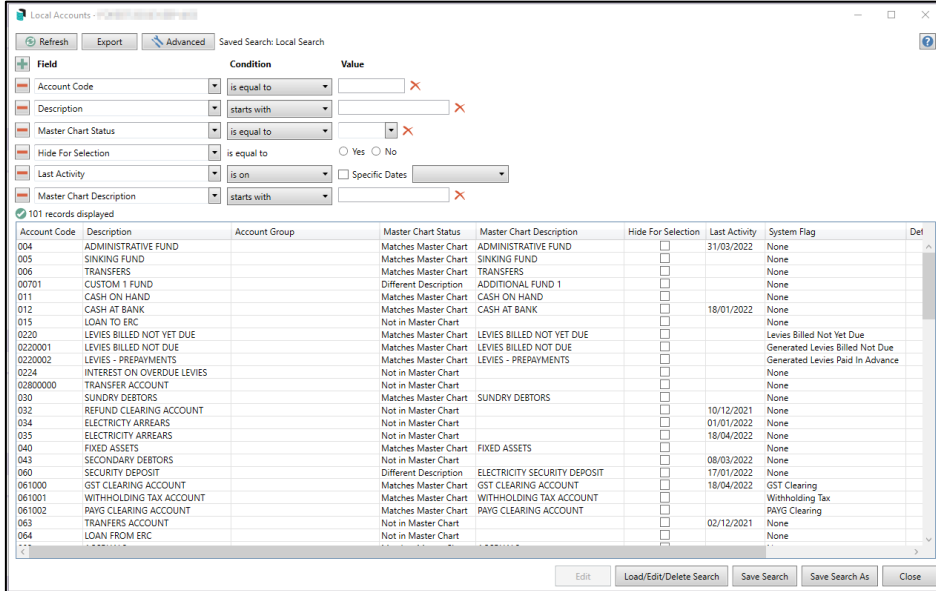
**Please Note:** Creditors and Debtors will not be included in these searches; they can be queried through their own searches.



## 4.1 Search Local Accounts

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

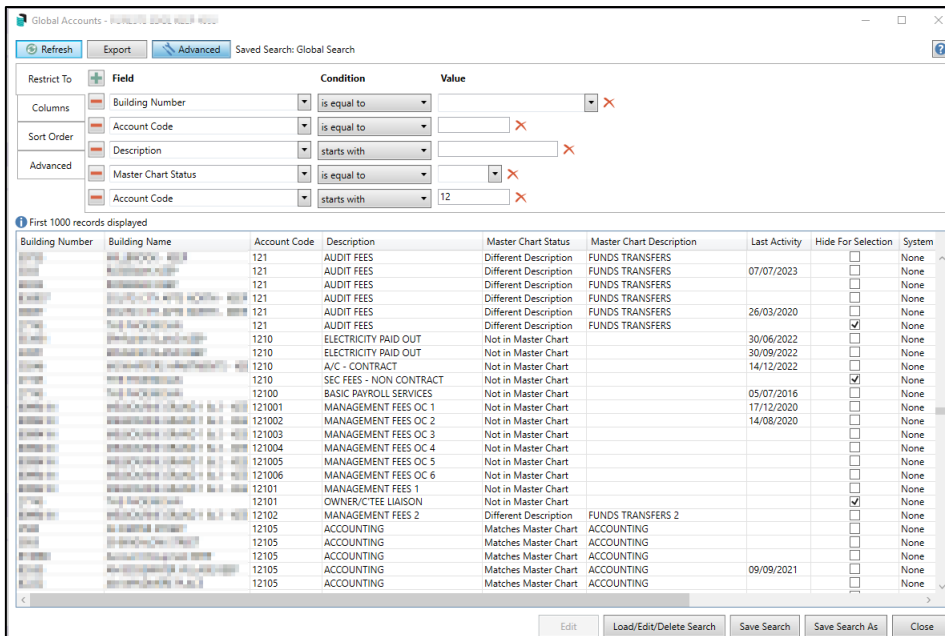
### Example of Search Local Accounts



## 4.2 Search Global Accounts

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

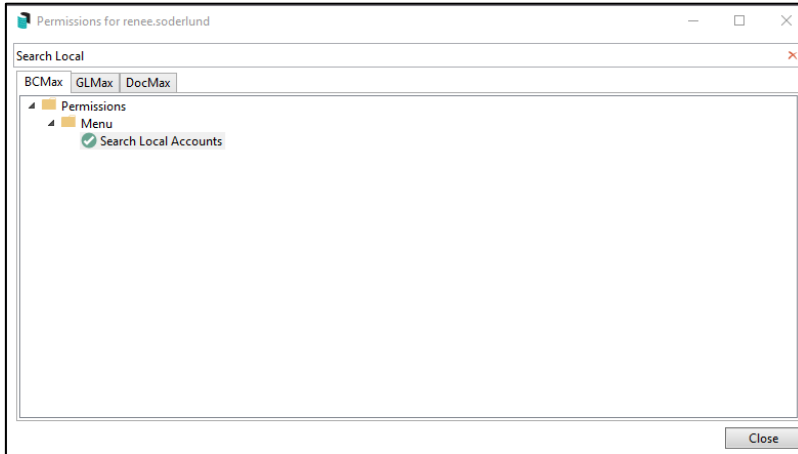
### Example of Search Global Accounts



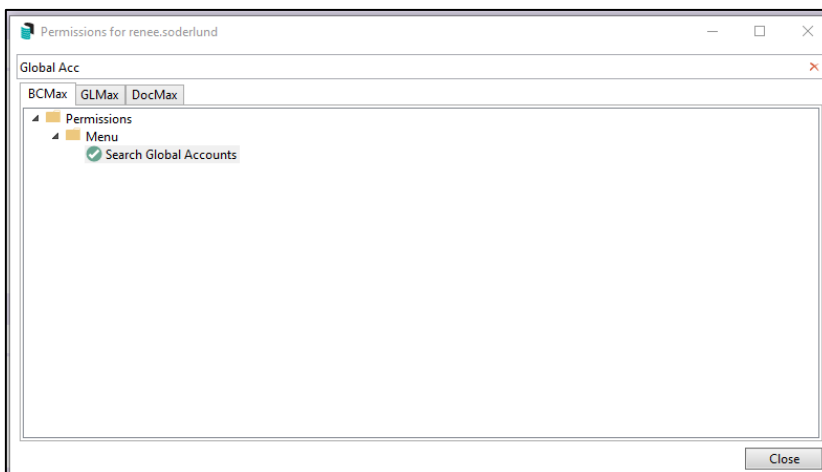
### 4.3 Security- Search Local Accounts and Global Accounts

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

#### Search Local Accounts



#### Search Global Accounts



## 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.