

Release Notes – Version 5.6.110

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

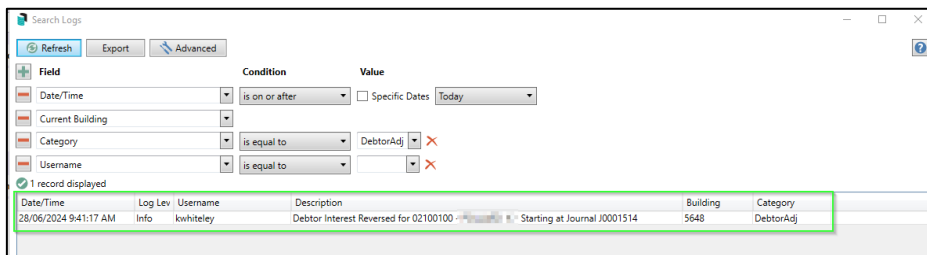


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What's New

1. Debtor Adjustments – Reverse Interest

When reversing interest using Debtor Adjustments the reversal actions will now be logged so users can clearly see who credited overdue interest which can easily be viewed in Search Logs.

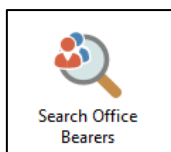


2. New Search available – Office Bearers

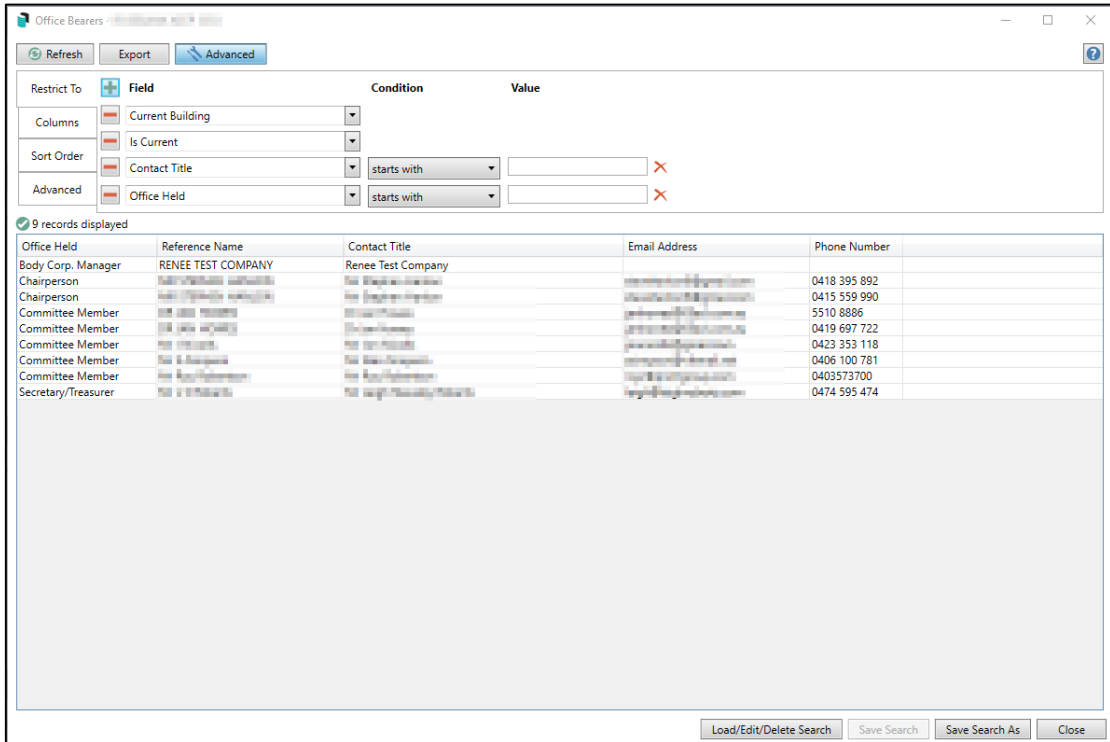
2.1 Search Office Bearers

'Search Office Bearers' is now available. This new search will allow users to search for Office Bearers across multiple buildings.

1. Navigate to Search Office Bearers

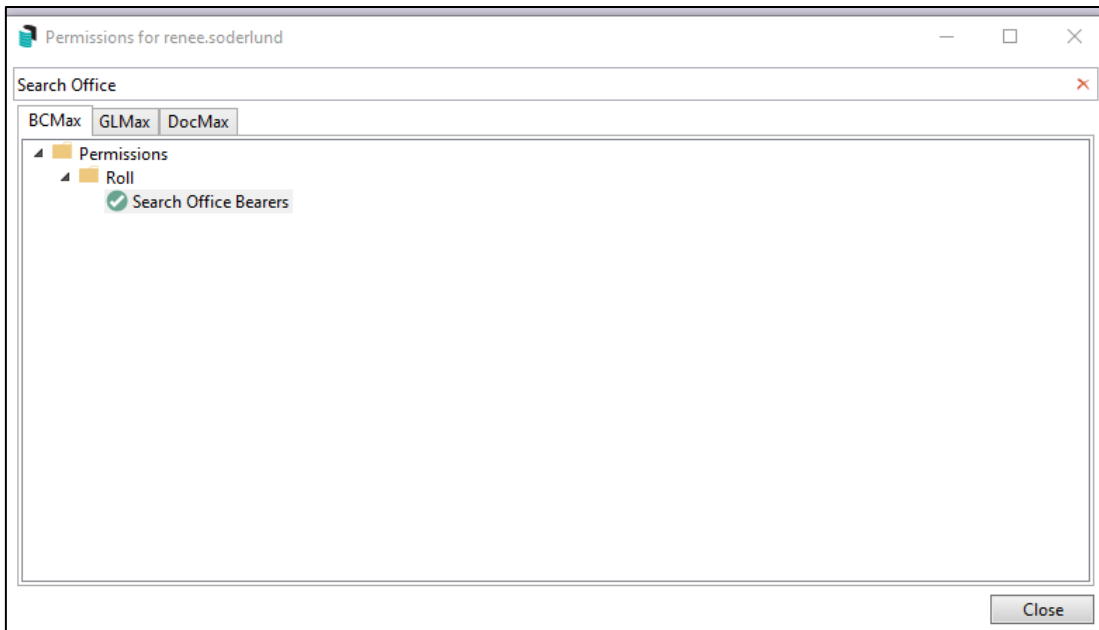


2. Office Bearer search will open.
3. Select your search fields.
4. Click on Refresh
5. Search will return the records based on the fields selected.



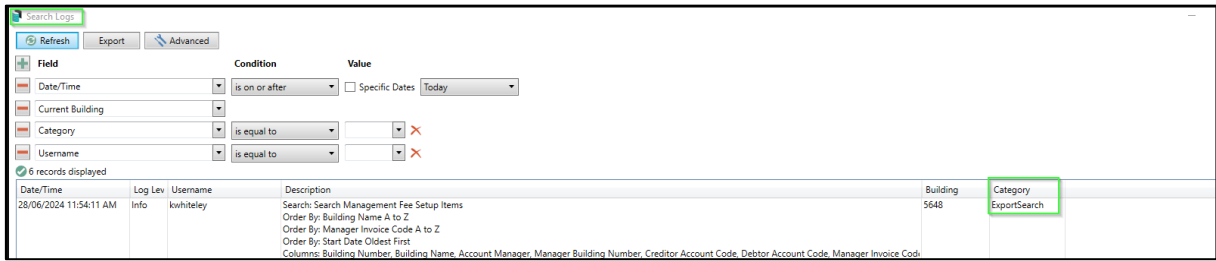
2.2 Security – Search Office Bearers

'Search Office Bearers' Security permissions can be set to allow, deny, or inherit



3. Exporting Searches – Logging

All searches that are exported to excel will now be logged in Log Viewer. The log will report the Date/Time, Username, Description and Building, Category.

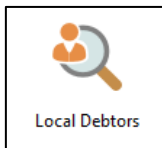


Please Note – This logging will be available for all searches when the Export button is selected.

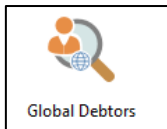
4. New Icon Updates

Icons for the following searches have now been updated:

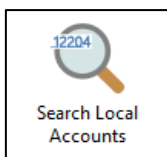
- Search Local Debtors



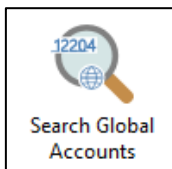
- Search Global Debtors



- Search Local Accounts



- Search Global Accounts

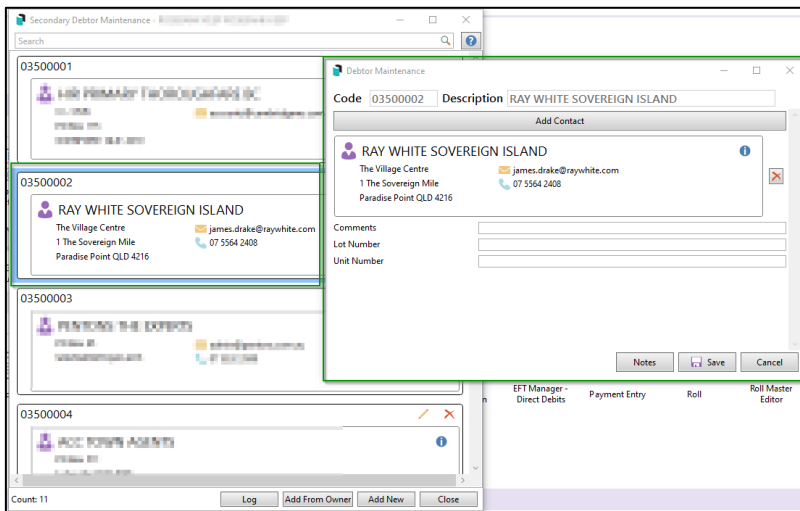


5. Debtor Maintenance (Second Debtors) – Enhancements

5.1 Opening Debtor information – Double Click

Debtor Maintenance User interface now has the ability to double click a record to open Debtor Maintenance for a selected Debtor. Results for the selected Debtor will open.

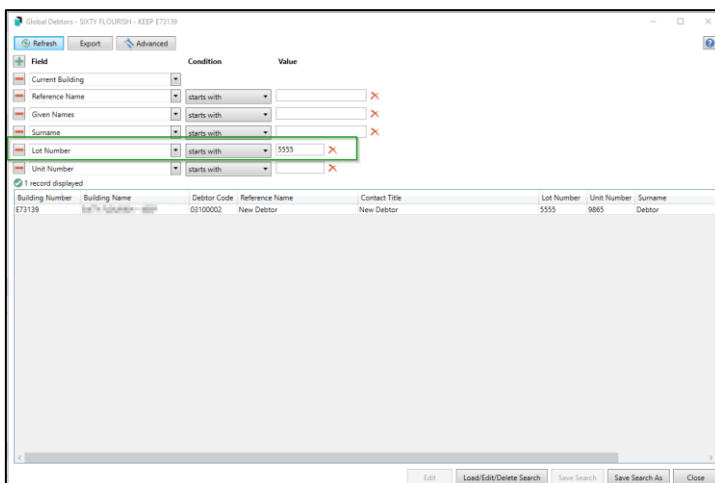
1. Navigate to Debtor (Second Debtor).
2. Double Click a Debtor record.
3. The results will load for selected debtor.



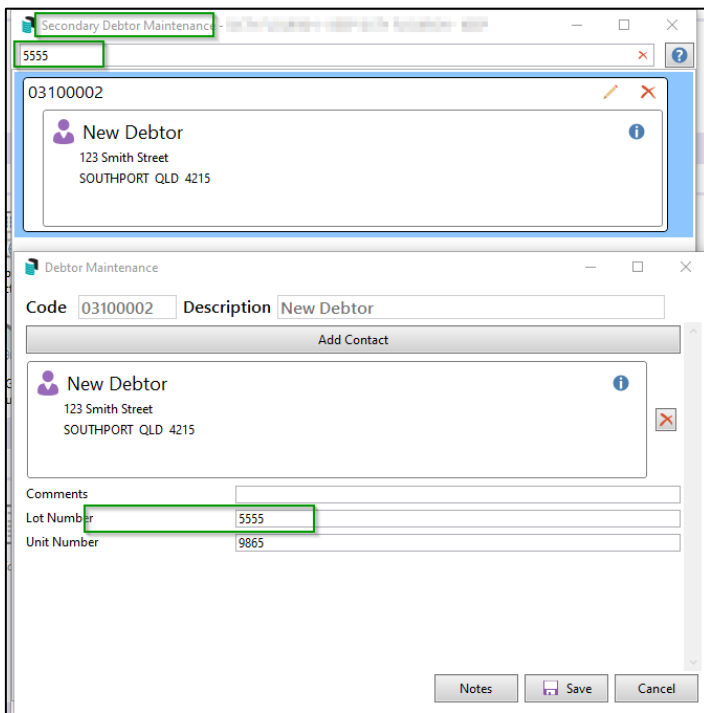
5.2 Search Fields for Debtors

Users can now search new fields, Debtor Name, Lot Number, Account Code, Telephone and Email using the following modules:

1. Local and Global Debtors – Example, searching a Lot number..

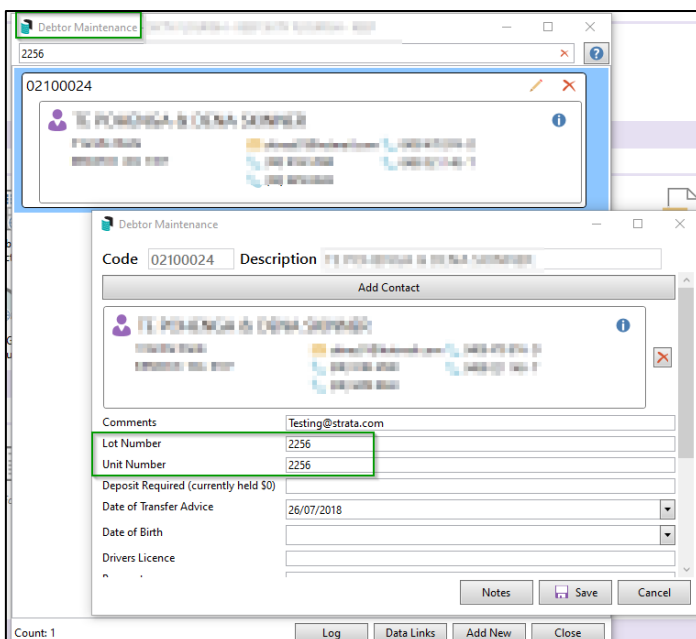


2. Debtor (Second Debtors) Main and Subgroup – Example, searching a Lot Number



3. Applicant Maintenance – Add/Change/Delete

4. Debtor Maintenance – Example, searching a Lot Number



6. Roll – New Validation

Validation has been added to the Roll Edit Screen when Name and Address title 1 are exactly the same so that if data is entered into Address Title 2 the user is advised. A new message alert will now appear 'Use the name field above for Full Name, then abbreviate with Address Title 1 & 2.

Roll Change Details - RENEÉ KEEP 6565

Ownership Details

Date of Receipt of Notice: 03/07/2024 Time: 16:00 Acquired: 03/07/2024

Car Space Number Storage Space Number Is Owner Occupied

Notes:

Comments:

Document:

Contact Details

Name: Mrs Renee Thomas Surname first

Title: Mrs Given Names: Renee Surname: Thomas

Type: Individual

Reference Name: Mrs Renee Thomas

Address Title (1): Mrs Renee Thomas

Address Title (2): Renee

Letter Title: Mrs Renee Thomas

Australian Business Number:

Postal Address: PO Box 346 Residential/Business

Phone:

Email Address:

Bank Account: BSB Branch Account Number

Website:

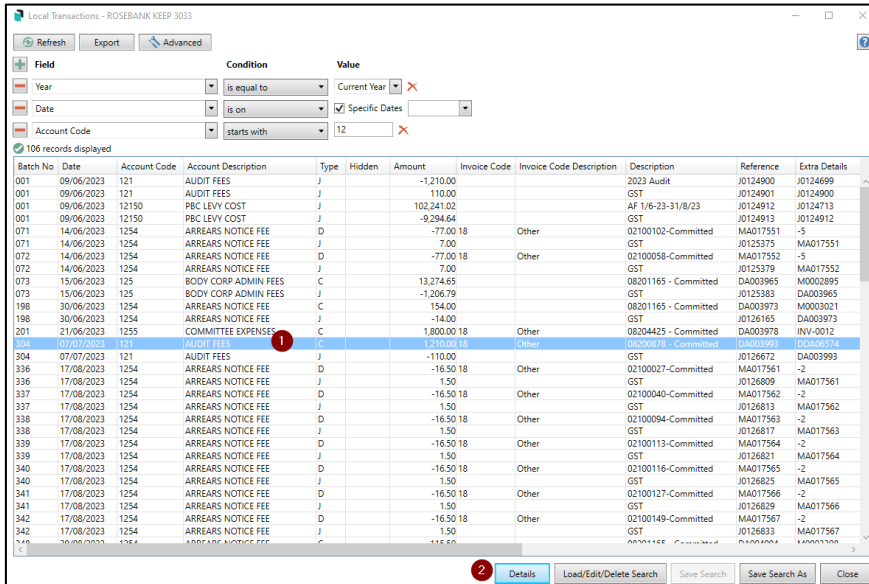
Delivery Preferences:

Use the name field for the Full name, then abbreviate with address title 1 & 2

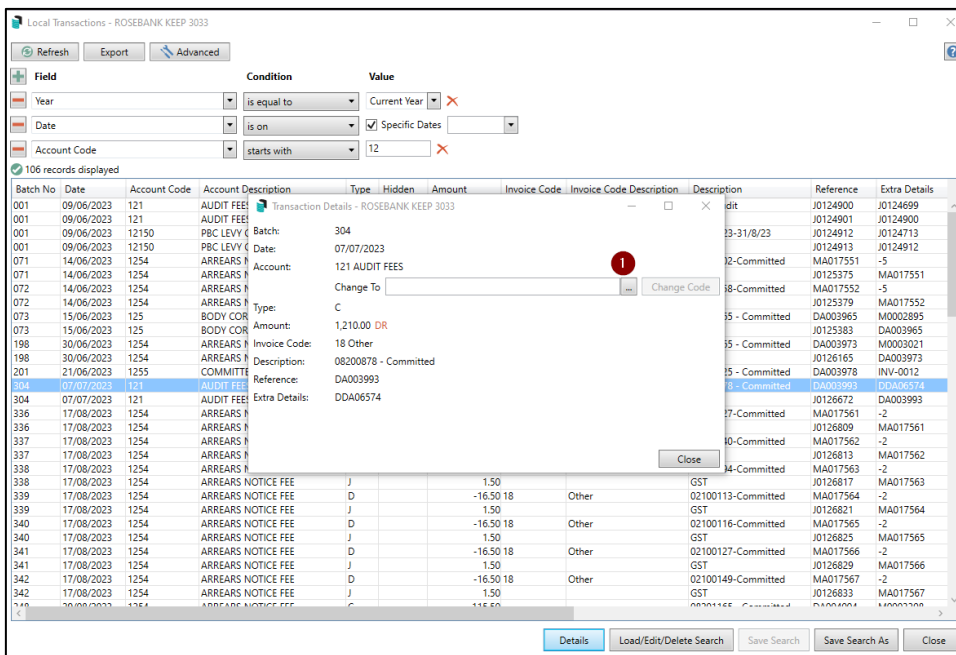
7. Replacement for Transaction Code Change

Transaction Code Change has been removed and will now be available in the Transaction Search. Follow the below steps to carry out a change code using Local or Global Transaction Searches.

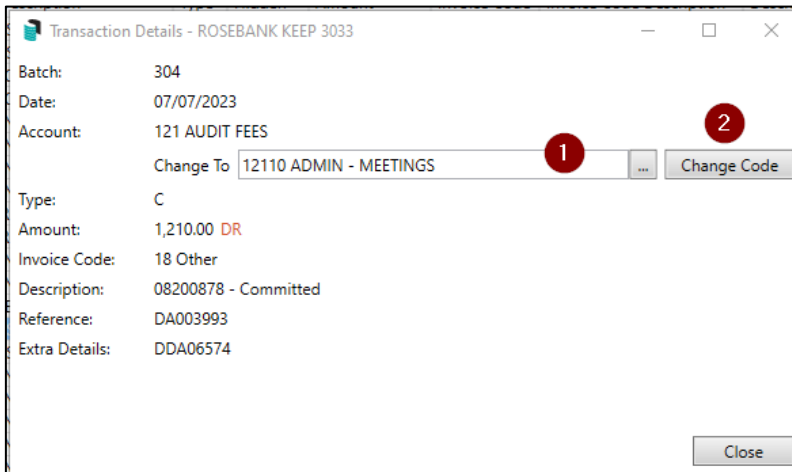
1. Navigate to Local Transactions or Global Transactions
2. Select Account Code in the field Search.
3. Enter the account code that needs to be changed.
4. Click on Details



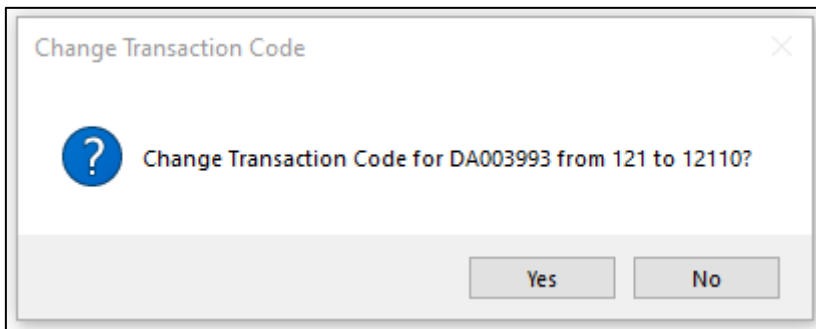
5. Change to field will be available in the form.
6. Select the dropdown option to select the code that it needs to be changed to



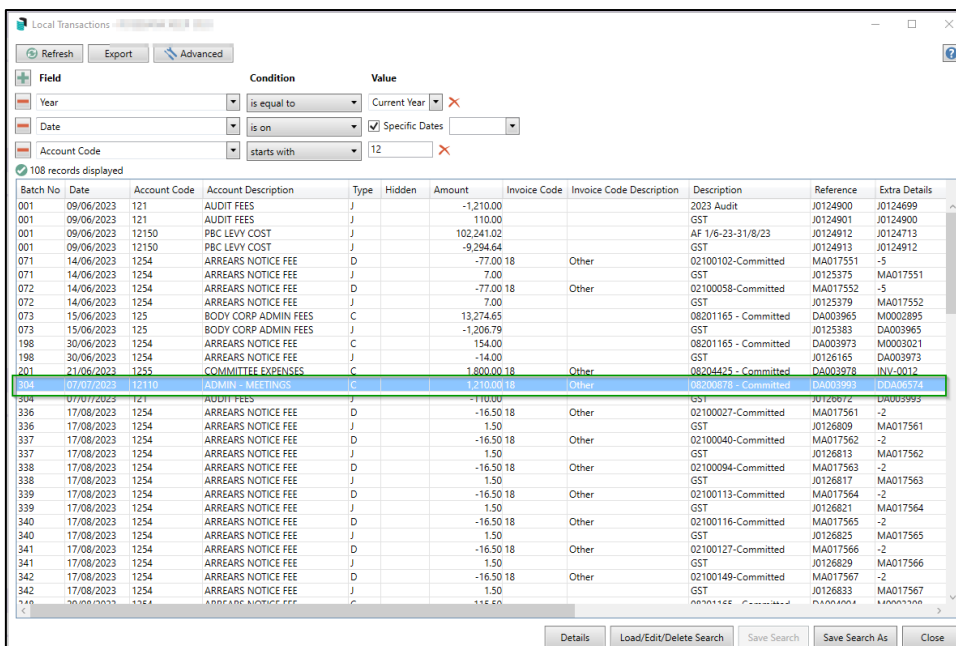
7. Select new code.
8. Click on Change Code



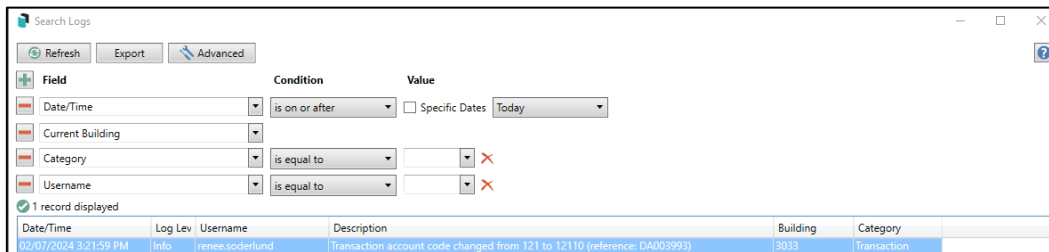
9. Click on Yes or No to the Validation message.



10. When refreshed the transaction will appear against the new selected code.



11. The Change Transaction Change code will be logged.

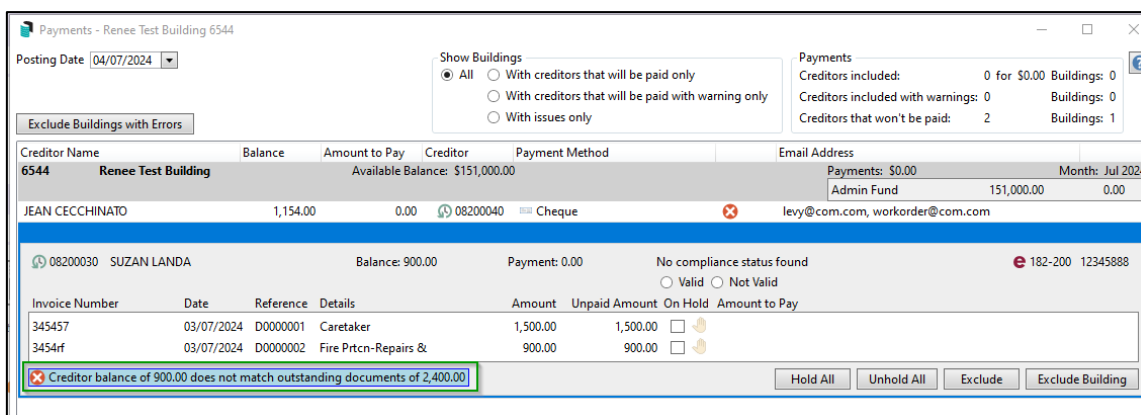


Please Note – Change Transaction Code is not available for the following transaction types and scenarios:

- Balance Sheet
- Non-posting accounts
- Sub and main (including debtor and creditor)
- Hidden transactions
- GST transactions (description 'GST')
- Building locked by someone else
- Change Transaction permission is not granted
- Historical
- Old Year if the Building is marked as Audited
- Appropriation transactions (description 'Trf Surplus/Deficit')

8. Payments – Creditor Balance

Enhancements have been made to report a creditor as out of balance instead of picking up journals that were done to reverse a creditor invoice from the old year when making payments.



What's Better

- Creating a Trading Fund – If a Trading Fund was created with a fund name longer than 17 characters an error was received. This has now been resolved.
- Roll Change Non-Owner – If a user double clicked on the save button when saving a roll change non owner the system would return an error. This has been fixed.
- Payment Management - Enhanced the speed of the data returning when searching for Payments.
- Security / User Profile – There was no validation to ensure that usernames do not start or end with spaces. This is now being validated.
- Roll List – The Roll List can now be sorted by surname.
- When sending large batches of remittances in EFT Manager the user interface will now show a waiting/progressing notification for a better user experience.
- Month End Rollovers – Will now trigger a building upload and log.