

# Release Notes – Version 5.6.149

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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



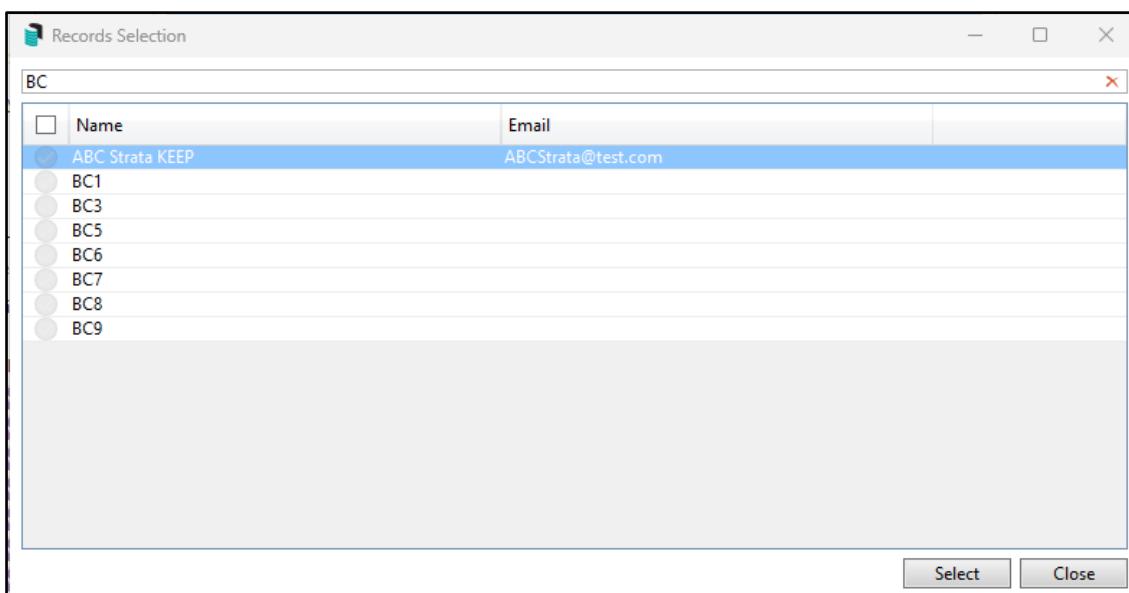
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# What's New

## 1. Levy Generation Schedule – Account Manager

Enhancements have been made to the new account manager configuration to allow users to search Account Managers available in the list. To access this configuration, follow the below steps:

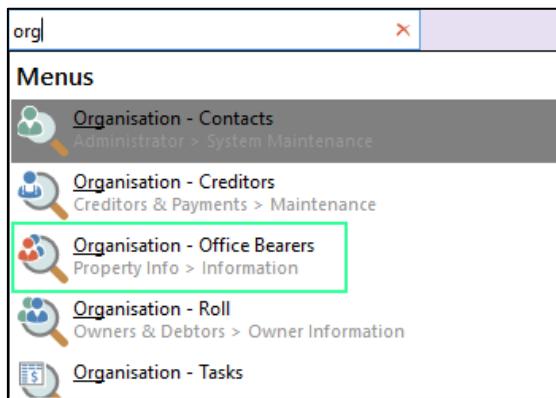
1. Navigate to Levy Management.
2. Click on Reports.
3. Select Levy Generation Schedule.
4. Click on the Configuration option.
5. New Account Manager Field will be available.
6. Click on the Account Manager option.
7. Account Manager selection list will appear.
8. New Search field will now be available.
9. Type Account Manager in the Search field and the system will return the matching Account Manager entered into the search.



## 2. Organisation Search – Office Bearers

A new organisation search is now available to search Office Bearers across organisations. The search is available to users who have access to multi drives.

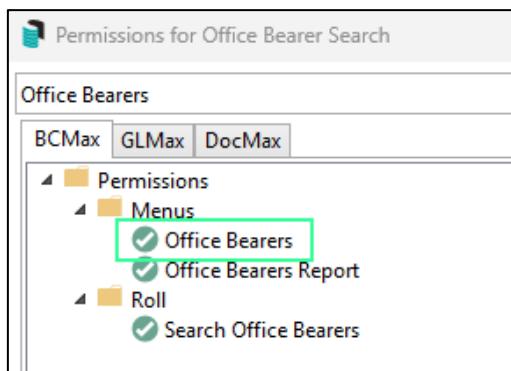
If logged in where multi drive access is available, search and select 'Organisation – Office Bearers.'



Searches can be saved and added as Dashboard items if required.

### 2.1 Organisation – Office Bearers Security

The Organisation – Office Bearers search security access is controlled by the Office Bearers Menu permission. User will need to have allow permissions on each drive they are using for the search to see results for the drive.



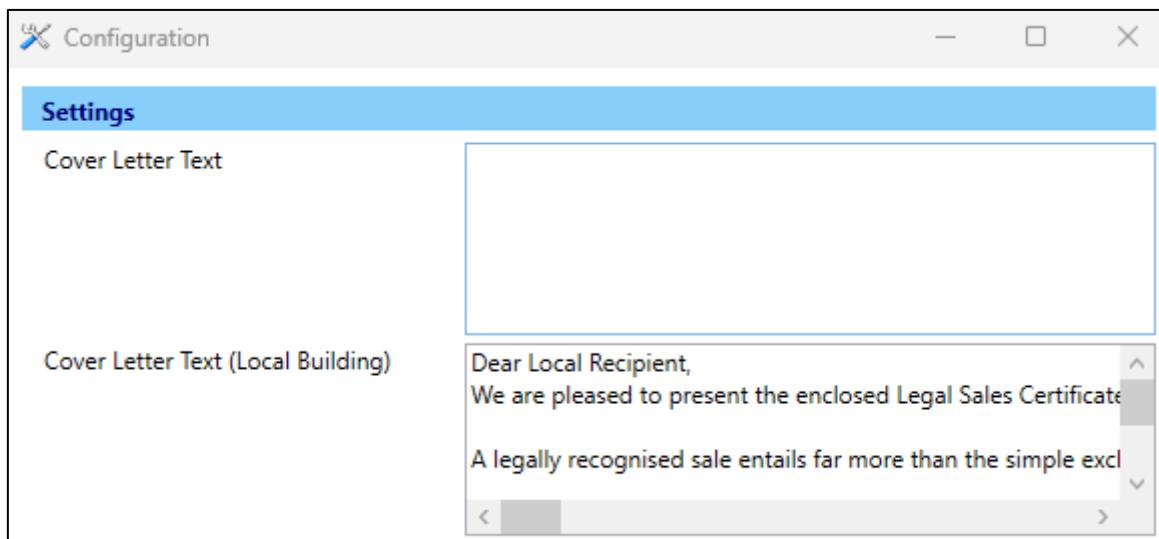
### 3. Certificate Cover Letter – Local and Global Text

The local text character limit for Certificate cover letters has been extended and will now allow up to four thousand characters of text.

While both the Local and Global cover letter text allow for four thousand characters, the letter can only produce one page, and we therefore recommend not exceeding two thousand characters to prevent formatting issues.

The ability to extend the number of pages for a cover letter will be introduced in a future release.

Navigate to Certificates and click the configuration cog beside the cover letter to view the Global and Local cover letter text fields.

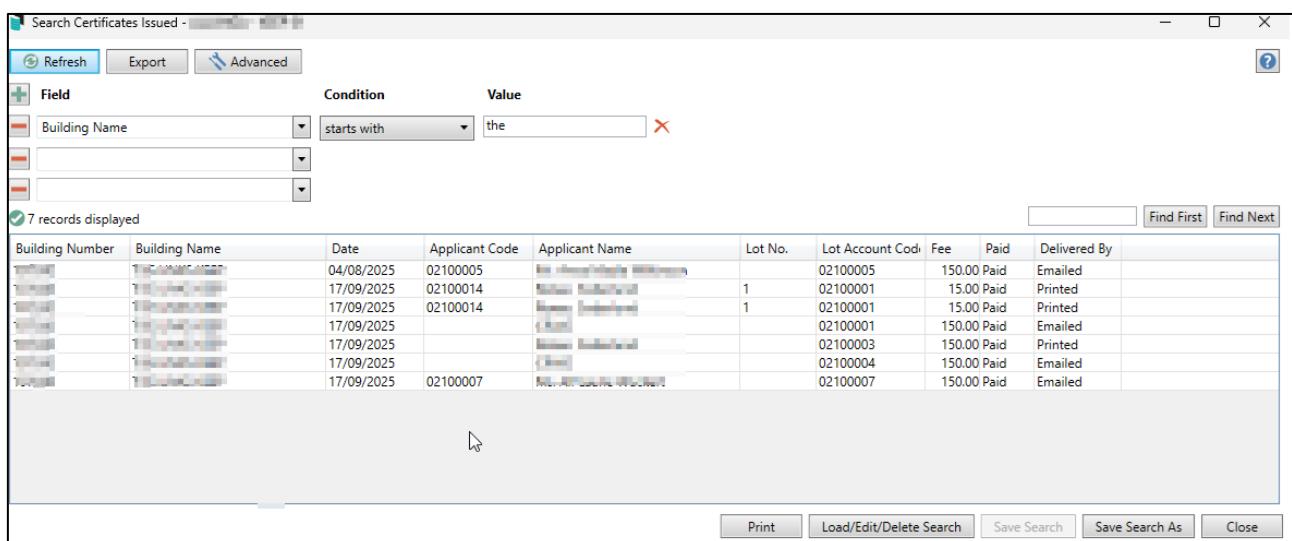
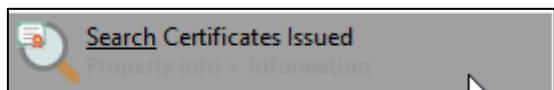


## 4. Certificates menu updates

The Certificates (Disclosure Statement) menu icon in StrataMax will now be titled Certificates, and the Disclosure Statement will not be able to be produced via the Certificates menu.



A new menu option 'Search Certificates Issued' has been created to allow searching for Certificates issued. The search screen will provide current search functionality in line with other StrataMax searches.



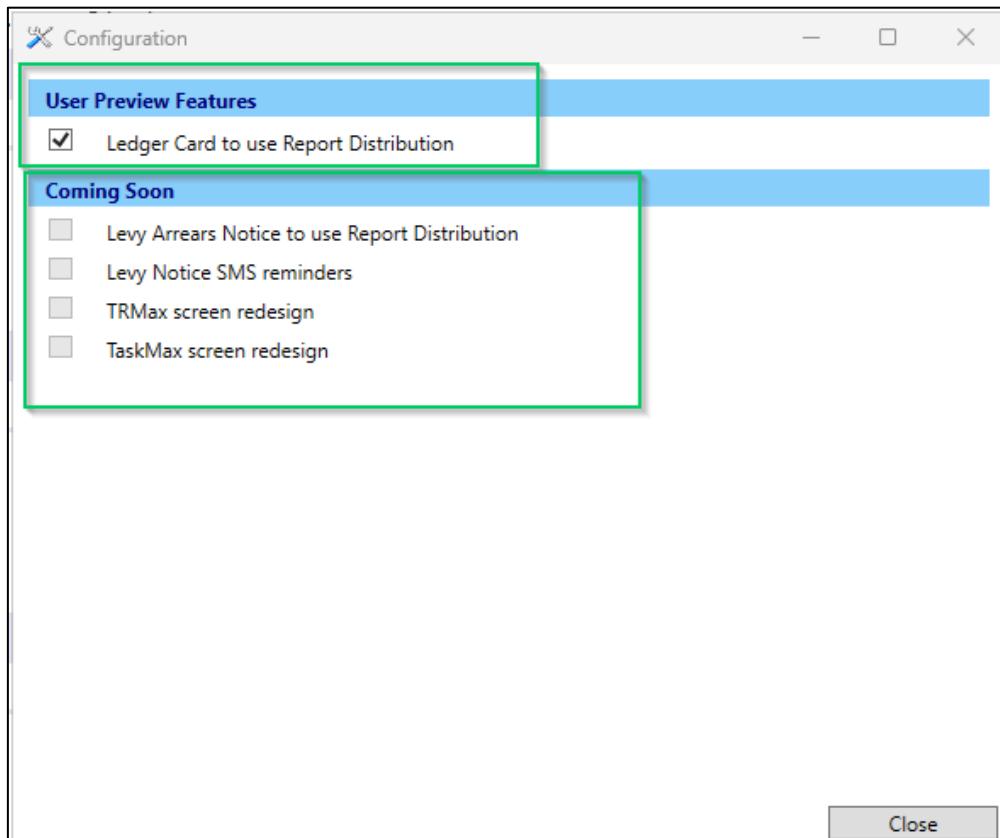
## 5. Preview Features – Removed

We have now retired a number of legacy views and removed the Preview Feature configurations. The following modules will now automatically use Report Distribution.

- Certificates
- Report Set
- Receipt Report
- Subgroup Update Report

**Please note** – the legacy Ledger Card will still have a ‘User Preview Feature’ configuration available but will be retired also in the future.

Users will now also have the ability to view ‘Coming Soon’ other feature previews that we also have coming up.

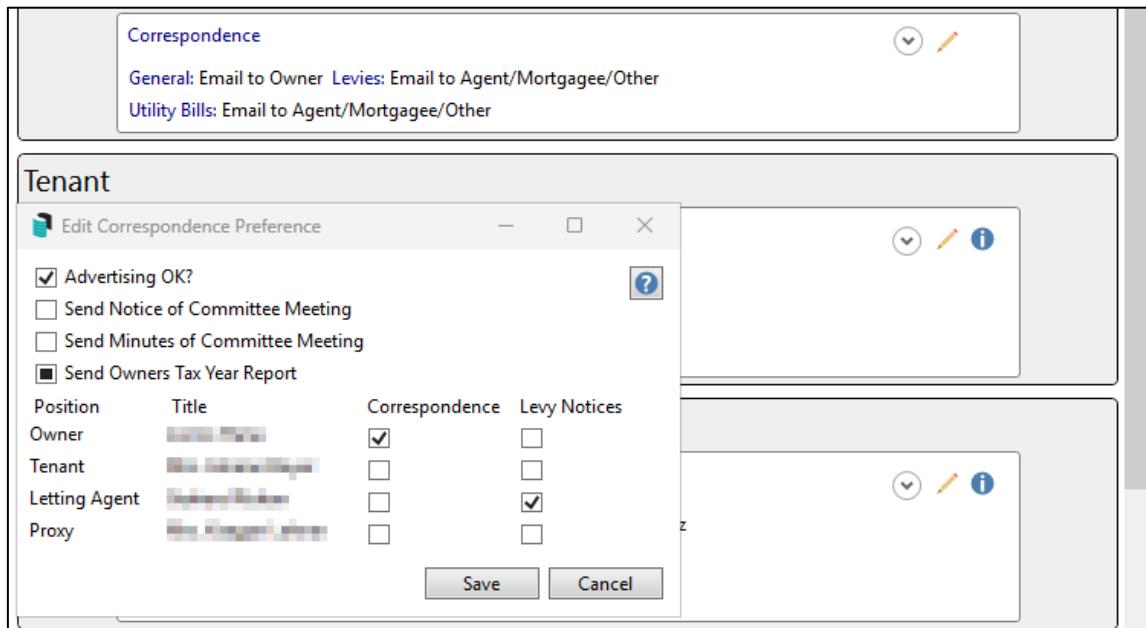


## 6. Roll – Edit Correspondence Preferences

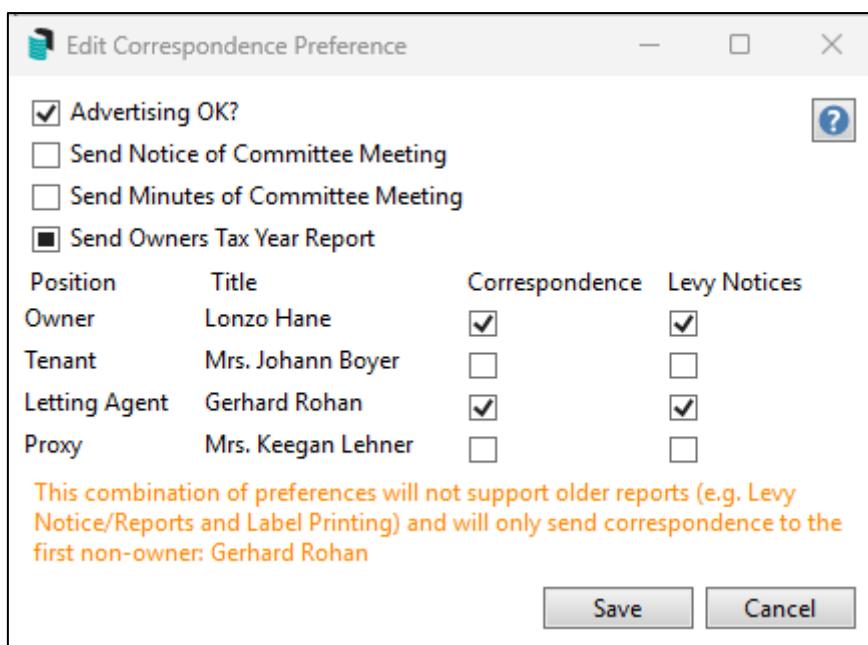
This version introduces new functionality in the Roll that allows a user to specify whether they want to send correspondence or levy notices to be sent to the owner only, the agent/mortgagee/other only or both. Correspondence Preferences can now be set using a tick box where multiple recipients can be selected for delivery regardless of whether they are owner, agent, mortgagee or other.

This is particularly useful where clients want correspondence to only go to the agent or where the lot has more than one ‘other’ representative.

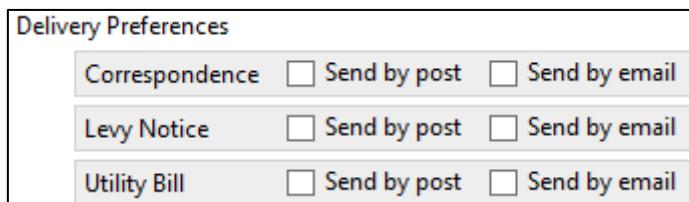
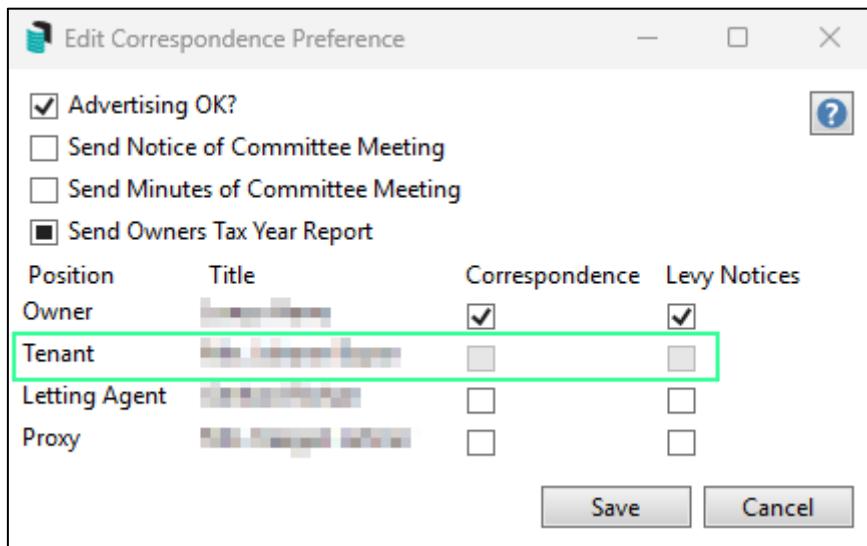
Navigate to the Roll and click the 'Edit Correspondence Preferences' icon to review the change. Recipients can be set by ticking the box for the type of documents the position holder should receive.



These settings will be used in new report distribution screens for reports, notices, and merge letters but older screens may not support selections. For example, Levy Notices and Reports will not support sending notices to more than one "other" recipient type. This will be indicated in the Edit Contact Preferences screen when set.



**Please Note:** If there are no delivery preferences specified for a particular delivery method, the option to set this in Correspondence Preferences will be disabled.



## 7. Statement / Ledger Card (Second Debtors)

### 7.1 New Style Templates (Report Distribution)

The following templates have been updated to the new style, enabling Ledger Card Second Debtor to use Report Distribution when preview is enabled for Ledger Cards.

- ledgercard\_3 – Statement/Ledger
- ledgercard\_a1
- ledgercard\_b1
- ledgercard\_g1
- ledgercard\_i1
- ledgercard\_rpt\_0
- ledgercard\_sp1
- ledgercard\_w1
- ledgercard\_wb1
- ledgercard1

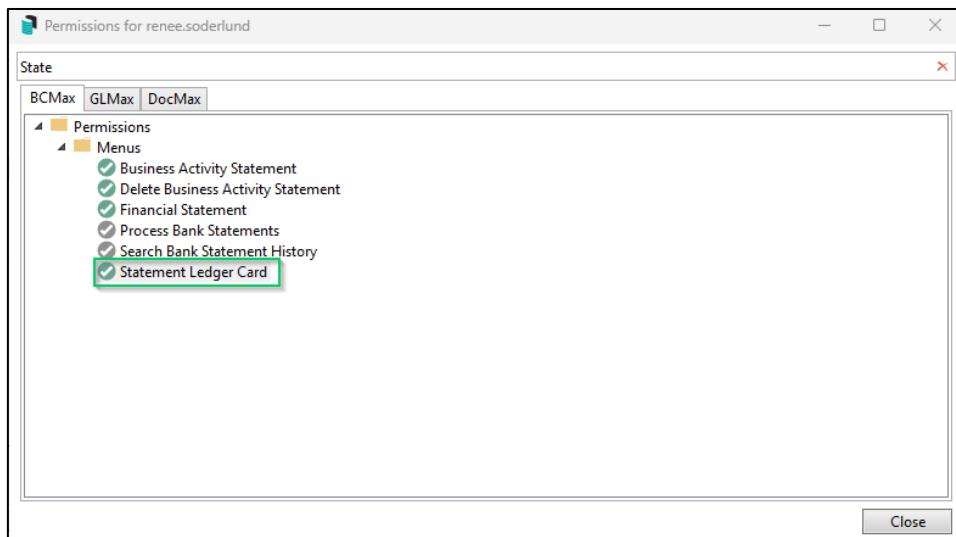
- `LedgerCardInternal`

To apply a template, open the Statement/Ledger Card (Second Debtors) in preview mode, select the configuration cog, and choose the required template from the Template drop-down menu, as shown below:

<code>ledgercard_a1</code>	Statement/Ledger Card - Building Address
<code>ledgercard_3</code>	Statement/L-Card - DepositSlip - Addrs Barcode - RD (Letterhead) (Deposit)
<code>ledgercard_a1</code>	Statement/Ledger Card - Building Address -RD (Letterhead) (Deposit)
<code>ledgercard_b1</code>	Ledger Card Addrs Bar Code- DepositSlip - RD (Letterhead) (Deposit)
<code>ledgercard_g1</code>	Company Statement - Deposit Slip - RD (Letterhead) (Deposit)
<code>ledgercard_i1</code>	Ledger Card International - RD (Letterhead) (Deposit)
<code>ledgercard_rpt_0</code>	Ledger Report - RD (Letterhead)
<code>ledgercard_sp1</code>	Ledger Email StrataPay -RD (Letterhead) (Deposit)
<code>ledgercard_w1</code>	Statement/Ledger Card - BCLHD-RD (Letterhead) (Deposit)
<code>ledgercard_wb1</code>	Ledger Card Bar Code BCLHD - RD (Letterhead) (Deposit)
<code>ledgercard1</code>	Statement/Ledger Card - Deposit Slip (Letterhead) (Deposit)
<code>LedgerCardInternal</code> Ledger Card - No Recipient (Letterhead) (Deposit)	

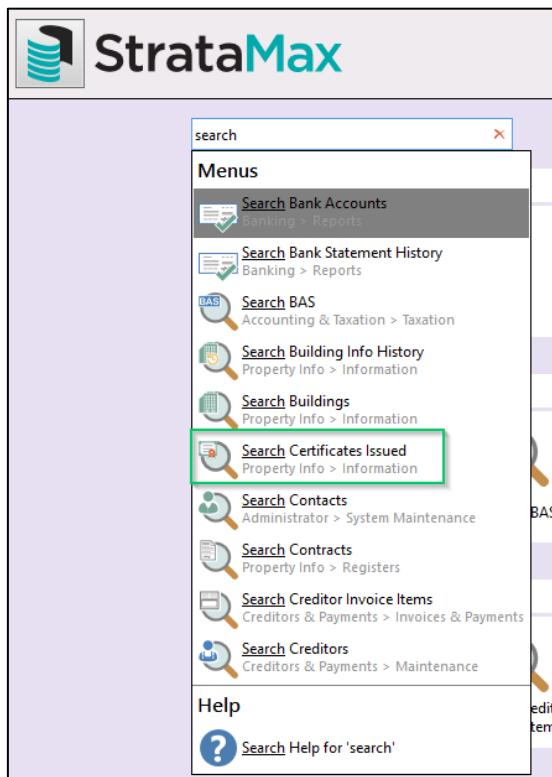
## 7.2 Security Statement/Ledger Card Second Debtors

To access the Statement/LedgerCard Second Debtors security permissions to the following menu will need to be set:



## 8. New Search – Certificates Issued

A new search has been added “Search issued certificates. This is available via a new menu option as shown below:



All certificates issued will display for a selected building or all buildings depending on the available filters selected. The records can be easily exported to excel to report records.

Field	Condition	Value	Find First	Find Next
<b>40 records displayed</b>				
Building Number				
Building Name				
Date				
Applicant Code				
Applicant Name				
Lot No.				
Lot Account Code				
Fee				
Paid				
Delivered By				
Delivered Date				

# What's Better

- Ledger Card – hidden transactions were part of the Running Balance; this has been resolved.
- DocMax - Deleting MRG group Stored Report documents in DocMax will now be prevented. Stored Reports allows delete.
- Process Bank Statements – The error message for processing banking for subgroups where there is an update code missing has been updated to be clearer as to which account does not have an update code.
- Creditor Maintenance - Creditor Details misalignment between hide and delete account has been resolved.
- Ledger Cards – Multi OC – Report Distribution Ledger Cards will now show the relevant Account Group above the line entry.
- Rationalisation – was creating unbalanced hidden transactions. This has now been resolved and all unbalanced transactions to different debtor accounts will no longer be hidden automatically.
- Creditor Invoices – Invoice flagged as 'Do not Pay' and payment 'dd External direct debit, periodic payment, internet transfer' selected. When fully paid invoices were reversed the invoice was being placed on Hold and appeared on Invoice Hub. This has been resolved.
- Levy Balance by Fund, Building Selection and Report Setup windows and Records selection – maximising and minimising specific windows was causing errors for some clients. This has been resolved.
- Notifications do not fire for abandoned or blocked tasks
- Building selector was occasionally crashing – this has been resolved