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The leader in property software

# STRATA Master Version 7.5.7 Release Notes

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| **Other Changes** | **Work Order / Quote Request Formatting**<br>Where the option in Agency configuration to Print agency details on work orders was not selected, work order and quote requests were not formatted correctly.<br>**Meeting Wizard > Complete Minutes**<br>Where a meeting was synced from MEETING Master an extra line was being displayed between the motion heading and the resolution wording. |

## STRATA Master Version 7.5.6 Release Notes

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| **Other Changes** | An issue has been resolved where changes could not be saved in the Lots tab on the Corp screen where the plan has 18 lots or more. |

## STRATA Master Version 7.5.5 Release Notes

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| **Additional Contact Details – Quick Reports**<br>**Show invalid email addresses** | When searching for lot or contact details in Quick Reports you are able to produce a list of lots/contacts where an invalid email address is saved in the primary contact details.<br>Select the checkbox Show invalid primary email addresses and Search.<br>Any lots or contacts with the following characters in the primary address field will be displayed: ; < > |
| **Additional Contact Details –**<br><br>**Validate email addresses on entry** | When recording an additional contact details and Email address is selected the email address will be validated on saving.<br>The email address may not contain invalid characters ; < > and must contain @ symbol. |
| **Barcoded invoices for Workflow** | New rules have been implemented in STRATA Master to accommodate Australia Post Generic (APG) barcode formats.<br>Where a creditor has an APG barcode format STRATA Master will now be able to auto-populate invoice data in both the Bulk Creditor Invoice Screen and fileSMART Barcoding workflow. |
| **Duplicate contacts – Additional details flag** | When identifying potential duplicate contacts in Manage > Contacts, where additional contact details are recorded a Yes will be displayed in the Additional Contact details column.<br>Where no additional contact details are recorded the column will be blank for the contact. |
| **Executive Meeting document distribution** | • When issuing executive committee meeting documentation, where owners have elected to receive these notices the email distribution will include additional contact types as setup for the lot.<br>• As issue has been resolved where the General lot contact was receiving executive committee meeting documents, not the Notice contact when an owner elected to receive executive committee meeting documents. |
| **R & M - Contacts** | The size of the fields which record the contact details used in Repairs & Maintenance have been increased to 100 characters to allow for additional contact details to be recorded in full.<br>A warning will be displayed when there are more than 100 characters to be displayed to enable you to check the required details are shown.<br>These fields are used in the Default R&M access contact, as well as the Reported by and Access Contact used in the Quick Work Order and the Job Details screen. |

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| **R & M - Work Order / Quote request Reports** | • Formatting of the report(s) has been changed to allow for more characters to be shown within the access contact section of the report.<br>• An issue has been resolved where the report was not displaying all Job details when saved to pdf and the reports was more than 1 page. |
| **Validation - Export / Import** | • The import functionality has been improved to better handle importing a plan with alpha-numeric lot numbers.<br>• The addition of Real Estate Agent postcodes and Tenant contact numbers has been made. |
| **Validation – Unit and Lot numbers** | When adding or editing lot and unit numbers in the Corp screen if any of the following invalid characters are entered, a message will be displayed and the details will not be saved - ; < > ' |

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<tr>
<td>Other Changes</td>
<td>Owner Wizard - Web Access<br>Where no lots had been activated for Web Access an error was being displayed if the Web Access button was selected in the Change Owner Wizard.<br>Owner Wizard – Levy Notice<br>Where multiple levies were due in the same month, by selecting the Levy Notice button in the Change Owner Wizard duplicate notices were printed based on the number of levies due in the month. Now only a single notice (as required) is printed for each month with a levy due.<br>Mail Merge & Labels<br>When a search had been completed in mail merge or labels if where a user would change screens the previously searched owners corporation is retained, but it was not being displayed on screen.<br>Emailing of Sub meter invoices<br>Where different stationery settings are configured for printing and emailing notices, the print setting was being used for emailing notices.<br>Archiving to Individual Lots folder in fileSMART<br>Where a lot included an invalid character \ / : * ? " < > | notices were not successfully archived in fileSMART.<br>Quick Work Order Screen – Duplicate Creditor Compliance Warnings<br>On saving, previewing or printing a Quick work order creditor compliance warnings were being displayed although confirmation had been previously entered after creditor selection.<br>Additional Meeting Resolutions<br>• Where an additional resolution had been added, if the motion was moved by using the up / down arrows the additional resolution was not being handled correctly.<br>• The additional resolution button will be disabled for items which do not allow additional resolutions such as headers, footers or where the motion has not been configured for selection in both the agenda and minutes screen as well as where a motion or additional resolution has been edited but not saved.<br>Meeting Minutes<br>• Where a resolution is recorded and then marked as resolved, where a user would then select Resolved for a subsequent motion without entering resolution details the previous resolution was copied in error.<br>• Where a meeting was synced from MEETING Master you were not able to view the merged minutes without first selecting each motion on screen.<br>Custom Header on Meeting Documents<br>Some custom headers were not being displayed accurately on meeting documents, where the DPI was over 200.<br>Cash Management Report<br>The Levies due section of the report was not printing a Sinking Fund section where no levy balances were due or received in the nominated reporting period, which differed from the behaviour of the Administrative Fund section of the report.<br>Cancel Trust Ledger Cheque<br>An error was being returned when users would attempt to cancel a trust ledger cheque using the Search/Cancel Payment option.<br>Manage > AGM Preparation<br>When changing the print order, the local terminology was not being displayed when the screen was in edit mode.<br>Manage Creditor > Direct Entry ID setup<br>Sinking fund expense accounts have been excluded from the expense account selector.<br>Owners List<br>Formatting has been improved to more clearly display all contact details.<br>Report Viewer<br>• Where a Windows Username contains a space a VB6 Report Viewer error was being displayed.<br>• When saving a report to rtf, the left margin was not being aligned correctly.<br>• When attaching a report preview to email the report was always named ActiveReports Document.pdf .The name of the attachment will now be the report name in STRATA Master.</td>
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# STRATA Master Version 7.5.4 Release Notes

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| **Other Changes** | **Error previewing reports**<br>An intermittent error was being displayed when previewing formatted reports directly from screens in STRATA Master. This only occurred in Beta versions. |

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# STRATA Master Version 7.5.3 Beta Release Notes

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| **GST Reports - Default dates** | When producing GST Reports, where the date selection has been changed before selecting the Owners Corporation, the date was reverting back to the previous GST period.<br>This has been changed to ensure that any date entered on the report parameters screen is retained.<br>This includes the following reports:<br>• GST Report<br>• GST Details Report<br>• Reports > GST Report<br>• Reports > Audit Trail Report > GST |
| **Insurance Claim Screen – Improve response time** | We have made a change to ensure that when there are a large number of Corp diary entries, and work orders for an Owners Corporation the Insurance Claim screen opens without delay. |
| **Multiple Proxy / Nominee Wizard** | **Wizards > Multiple Proxy / Nominees**<br>This wizard has been updated to allow bulk update for Proxies, Nominees or Owner Representatives from within two screens. |
| **Receipting Screen – Remove date spinner** | When creating banked receipts the date spinner has been removed as users were creating back dated receipts to prior financial years in error.<br>To backdate a receipt users are still able to manually enter the date, or use the date selector. |
| **Repairs & Maintenance – Quick Work Order –<br>Add a New Creditor** | Changes have been made to allow users add a new creditor from the Quick Work Order screen.<br>To create a new creditor:<br>1. Select the New Icon to the right of the creditor selector<br>2. Enter the creditor details<br>3. Save, and close the Creditor screen<br>4. The new creditor will be pre-populated on the Quick Work Order screen<br>**Note:** The user must have Write Access Rights for Creditors to add a new creditor from this screen. |
| **Rockend Website – Knowledgebase Link** | A new option has been made available under Help > Rockend Website > Knowledgebase.<br>When this option is selected your default browser will be launched directly to the Rockend knowledgebase. |

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| **Other Changes** | The following issues have been rectified in this version:<br>**Meeting Register - Copy a meeting**<br>When copying a meeting the additional resolutions were not being copied on the meeting agenda.<br>**Issue Executive Committee notices/minutes to Owners**<br>When this option was selected for a lot the recipient of the meeting documentation was the General Owner contact, not the Notice contact.<br>This has been resolved when:<br>• Issuing Committee meeting agendas<br>• Issuing Committee meeting agendas<br>• Printing Labels for Executive Members, and ticking Include owners requesting EC minutes/notices<br>• Completing a Mail Merge for Meetings and ticking All executive committee and owners requesting EC minutes/notices<br>**Preview Meeting documents closing Word**<br>When previewing a meeting agenda or minutes, if Word was opened it would be closed without prompt. This only occurred in the Beta version 7.5.2.<br>**Aged Arrears List**<br>The "Show additional contact details" check box has been removed from the report parameters screen for Aged Arrears List as it was being displayed in error.<br>**GST Alerts**<br>• An alert, and GST Audit trail record was being displayed when entering a transaction on the last day of a GST period.<br>• When an owners corporation was not registered for GST, alerts and GST Audit trail records were being created. |

## STRATA Master Version 7.5.2 Beta Release Notes

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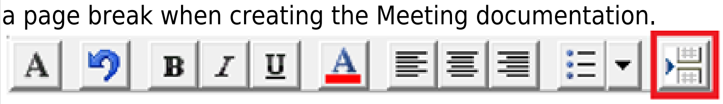
| **Levy Wizard – Issue Submeter invoices** | A new option has been added to the Levy Wizard to issue sub meter invoices by either Print or Email.<br>Options include:<br>• Issue invoices for individual or multiple owners corporations<br>• Send invoices using the default method configured on the Sub meter set-up screen<br>• Send invoices by Print regardless of the default method<br>• Print in unit or contact order<br>• Save notices to file<br>• Charge fees for invoices |
| **Meetings – Page Breaks** | When creating Meeting Agendas and Minutes a new icon is displayed, which will insert a page break when creating the Meeting documentation.<br><br>• Page Breaks can be added from the Agenda/Minutes set-up screen for each Association type as well as the Agenda and Minutes screen accessed from the Meeting Wizard.<br>• When you select Page Break line will be displayed as shown below; representing where the page break will be inserted.<br>• Upon previewing / merging your meeting documentation the page break will be activated. |
| **Repairs & Maintenance – Quick Work Order** | Changes have been made to allow users to edit a work order displayed on screen.<br>• When the screen is launched it is in Read only mode and you must select the New icon, or click F2 to create a new work order.<br>• To create a new work order for a different plan, change the Owners Corporation selection and select the New icon, or click F2.<br>• To edit a work order displayed on screen, you may select the Edit icon, or click F3. This will allow any additional details to be added, or corrections to be made prior to issuing the request the work order request. |
| **Repairs & Maintenance – Work Order and Quote Requests** | When producing a Work Order or Quote Request the ABN of the Owners Corporation will be displayed in the Invoice box below the Body Corporate Name. |

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| **Other Changes** | The following issues have been rectified in this version:<br>**Updating the Executive Committee**<br>• When a new executive committee member was added and the lot selected was None an error was being displayed.<br>• Users were unable to save a change to the Number of members and the Last executive committee meeting date.<br>**Entering a New Plan**<br>When adding a new plan, upon saving an error was being displayed.<br>**Emailing a Work Order or Quote from Print Preview**<br>When emailing a previewed work order or quote the recipients email address and subject line of the email was not being pre-populated. |

# STRATA Master Version 7.5.1 Beta Release Notes

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| **Additional contact details - Record for Owners, Agents and/or Tenants** | You are now able to record additional details for a lot or executive contact.<br>The primary contact details entry screen remains unchanged and all additional contact details may be recorded in the "Additional contact details" section of the screen.<br>To record additional contact details:<br>1. Select the type of details you want to add<br>2. Enter any additional notes (optional)<br>3. Enter the number or email address in the Value column<br>Where additional email addresses are added you may also select if the contact would like to use these addresses for receiving Levies, Meeting Documentation and/or Correspondence.<br>To include the additional email addresses when emailing, place a tick in the columns named L, M and/or C.<br>Where additional contact details are recorded for a contact click on the View additional details button to display details recorded.<br>**Notes:**<br>• When adding a new contact it must first be saved to STRATA Master, and then placed back in edit mode to record additional contact details.<br>• When viewing additional contact details the Notes and Value fields will be displayed as a tooltip when you hover the mouse over the field.<br>• You are able to copy and paste the details from the additional details screen by highlighting the fields and using copy + paste.<br>• When emailing all owners via the Messaging functionality any additional email addresses for the lot owner will be included. |
| **Additional contact details – Owner & Executive Portals** | To show all contact details on the Owner & Executive Portals, this must first be enabled in STRATA Master. Users with the appropriate security settings should access the Configure > Web Access Wizard menu item, and select General Configuration to view the setup screen.<br>On upgrade, the options are set to No, which means that no additional contact details recorded on the lot will be displayed on the Portfolio tab on the Portals.<br>• To show only the contact details on the portal select Yes to "Show additional details"<br>• To also show the Notes field associated with the additional details on the portal by selecting Yes to "Show additional details notes" |

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| **Additional contact details – Report Changes** | There are additions to both Formatted and Quick Reports to display additional contact details and additional email recipients.<br>**Formatted Reports**<br>Owners List<br>The Owners List has a new output option called "Show additional details".<br>• Select this option to include all contact details recorded on the lot.<br>• The report will also display the default delivery method for levies, meeting documentation and correspondence.<br>• Where the default delivery method is set to email the report will list all recipients email addresses.<br>Executive Report<br>• This existing report will display any additional contact details recorded against an executive committee member.<br>Lot Details Report<br>• This existing report will display any additional contact details recorded against a lot.<br>**Quick Reports**<br>Contacts<br>• To view all contact details recorded against a contact select "Show additional contact details".<br>• All additional detail records will be shown at end of the row. There is no column selection required, or ability to exclude from the view.<br>Lot<br>• To view all contact details recorded against a lot owner select "Show additional contact details".<br>• All additional detail records will be shown at end of the row. There is no column selection required, or ability to exclude from the view.<br>Lot - Show Current Owners<br>• To view all email recipients of levies, meeting documentation and correspondence select "Show additional contact details".<br>• All email address(es) will be displayed in the columns following the delivery method.<br>• Where multiple email addresses are recorded as recipients they will be displayed separated by a ; |

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| **Additional contact details – Distribute documents to multiple contact types** | From the Lot Owner Screen in the Levies or Notices tab you may select additional contact types to receive copies of documentation by email.<br>In the Levies tab when the delivery method is set to Email any other lot contacts with a primary email address recorded will be enabled in the selection directly below the delivery method.<br>Once you have selected the additional contact type(s) to receive levy notices they will be included as email recipients when Email levy notices is selected from the Levy Wizard.<br>This will include both the primary email address for the contact plus any other additional email addresses where the ‘L’ checkbox is ticked.<br>In the Notices tab when the Correspondence delivery method is set to Email any other lot contacts with a primary email address recorded will be enabled in the selection directly below the delivery method.<br>Once you have selected the additional contact type(s) to receive copies of correspondence when emailing Interim reports or AGM Reports they will be included as email recipients.<br>This will include both the primary email address for the contact plus any other additional email addresses where the ‘C’ checkbox is ticked.<br>In the Notices tab when the Notices & minutes delivery method is set to Email any other lot contacts with a primary email address recorded will be enabled in the selection directly below the delivery method.<br>Once you have selected the additional contact type(s) to receive copies of Notices & minutes when emailing agendas or minutes from the Meeting Wizard they will be included as email recipients.<br>This will include both the primary email address for the contact plus any other additional email addresses where the ‘M’ checkbox is ticked.<br><br>Notes:<br>• The contact type’s email address is the To recipient and all additional contact types are displayed as bcc.<br>• Additional contact types can only be selected to receive emailed documents where there is a primary email address recorded for the contact.<br>• When emailing levy notices and Save to File is selected all email recipients will be displayed in the document management system.<br>• Any charges automatically created by STRATA Master will continue to be based on a per lot basis, not based on the number of email recipients. |

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<tr><td>Corporation Audit Trail</td><td>When saving changes on the Corporation screen an audit trail record will now be made in the database.<br>General<br>• Manager<br>• Year End<br>Financial<br>• TFN<br>• ABN<br>• Tax Year<br>• Interim Reporting Period<br>• Debt Collector<br>• Normal levy frequency<br>• Levy discount rate<br>• Levy discount grace days<br>• Levy interest rate<br>• Interest free period<br>• Reserve funds<br>Structure<br>• Association type<br>• Management commencement date<br>• Management ended date<br>Bank Acct<br>• Main bank account<br>• Investment account<br>Entitlements<br>• Entitlement sets<br>• Units of entitlement<br>Executive<br>• Reports Y/N<br>• Report delivery method<br>• Add a new member<br>• Delete a member<br>Management Fees screen<br>• New rate<br>• Edit rate<br>• Auto-increment flag<br>• Increase rate or CPI selection<br>Budget screen<br>• New budget<br>• Existing budget is edited<br>• Existing budget is deleted<br>To view this record you are able to create a report from Reports | Audit Trail Reports, by ticking the Corp option.</td></tr>
<tr><td>Change Manager Utility</td><td>A new screen can now be accessed by users with the appropriate security permissions under; Utility | Change Manager.<br>This screen allows you to redistribute a portfolio simply by selecting the manager's name using the combo shown under Existing Manager.<br>Once the selection is made a list of all managed plans assigned to that manager is displayed in below.<br>You may then select the new manager on the right side of the screen by using the combo shown under New Manager.<br>Select the plans to be reassigned to the new manager, and then click the icon in the toolbar to reassign the plans.<br>You will then be prompted to enter a reason for the change in manager, which is recorded in the Audit Trail for the plans selected.</td></tr>
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| **Bulk Update Penalty Interest Rate** | Where there is a global change of interest rate for a particular Association type / Jurisdiction you are now able to update the rate for all plans using the Association Type screen found in the Configure menu.<br>To update interest penalty rate:<br>1. Navigate to Configure \| Association Types<br>2. Place the screen in Edit Mode<br>3. Enter the new rate<br>4. Click Save<br>5. Click OK to confirm the rate change.<br>A message will then be displayed confirming the number of plans updated. |
| **Budget Screen** | The budget icon is now displayed on the main toolbar which will open the Budget Maintenance screen.<br>You will no longer need to open the budget maintenance screen through the Corp screen, and you are also able to change plans to view another budget. |
| **Insurance – Policy Changes** | When entering a policy you must now record a policy start date.<br>The new field has been added to the Quick Report \| Insurance ~ Show insurance policies and is displayed before the Policy renewal date.<br>**Notes:**<br>• During upgrade the policy start date will be determined by the expiry date, and assumes the policy duration is one year.<br>• The policy can be for a period other than 1 year, and this is only assumed for the purposes of inserting a date on upgrade. |
| **Insurance – Commission** | When entering a policy you are now able to choose whether you want to record the commission for the policy.<br>Click the Record Commission check box to view the Due and Received fields.<br>The new fields have been added to the Quick Report \| Insurance ~ Show insurance policies which will allow you to:<br>• Determine on which policies the agency will receive commission.<br>• Compare the amounts due and received<br>• Create a report of all commissions received<br>The inclusion of the commission on report is configurable and is not included by default. You can also set-up a reminder to ensure commissions are received.<br>**Notes:**<br>• The default setting for the Record commission check box is not ticked.<br>• You are able to update commission for existing policies recorded in STRATA Master. |
| **Insurance – Default Policy Types** | When adding a new policy to an Owners Corporation, once the policy type has been selected any pre-configured insurance coverage types will be populated on screen.<br>Where a default coverage type is displayed, but not included in the policy for the plan you may delete the record from the insurance details in the Corp screen.<br>To configure default coverage types for insurance policies, users with the appropriate security access can open the Configure \| Insurance Policy Types screen.<br>1. Place the screen in Edit Mode<br>2. Select the Policy type on the left (shown under description) to be updated.<br>3. Select the required default coverage types for the policy by placing a tick in the checkbox(es).<br>4. Save<br>**Notes:**<br>All coverage types recorded in the Insurance Coverage Configuration screen are displayed for selection. |

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| **Insurance – Reports** | The new policy start date is shown on the report and the existing details have been realigned.<br>There are also two new configuration options which allow agencies to include notes and/or commissions on the Insurance report.<br>To configure additional information to be displayed on the insurance report users with the appropriate security permissions may open Configure \| Agency \| Options # 1.<br>To update the insurance report for the agency:<br>1. Place the screen in Edit Mode<br>2. Select the check-box to Show coverage notes<br>3. Select the check-box to Show commission received<br>4. Save<br>Where there are multiple excesses recorded for a policy coverage type, these may be recorded in the coverage notes field which can then be displayed on the report.<br>The following reports will display the additional details:<br>• Formatted Reports - Insurance Report<br>• AGM Preparation<br>• Owner & Executive Portal - Insurance Report<br>• Meeting agenda/minute merge field<br>**Notes:**<br>• Where the Record Commission check-box is not ticked the commission field is not displayed on the report.<br>• The value recorded for commission received is displayed on the insurance reports.<br>• Where multiple policies are recorded for an owners corporation the commission will be displayed for each policy separately. |
| **Invoice Entry – Reserve Funds** | A new field has been added to the Owners Corporation screen \| Financial tab which allows you to set an amount as Reserve Funds.<br>This amount will be deducted from the Available Funds for the Owners Corporation, and will be taken into account when determining whether invoices should be set to Pay or On Hold.<br>The Reserve Funds are displayed in the Available funds display which is shown throughout STRATA Master.<br>**Reporting**<br>Quick Reports - Corp allows you to view the amount recorded for each Owners Corporation.<br>Formatted Reports - Strata Bank Balances will display the Reserve Funds as recorded for each Owners Corporation.<br>**Notes:**<br>• When Reserve Funds are saved an audit trail record is created.<br>• The amount recorded must be greater than zero.<br>• Where the amount recorded in Reserve Funds is greater than the Available cash a confirmation message will be displayed, on saving an audit trail record will be created which will include the Available cash at that time. |
| **Invoice Entry – Tracking expenses against budget** | When entering invoices STRATA Master will now compare and display the current year to date expenses and budgeted amount for the selected expense account on the following screens:<br>• Creditor Invoice screen<br>• Creditor Invoice - Multiple Dissection screen<br>• Quick Pay screen<br>Where the current year to date expenses are greater than the budgeted amount, they will be displayed in red.<br>When validating invoices using the fileSMART Creditor Invoice or the Bulk Creditor Invoices screen a warning message will be displayed and included on the report where the budget is exceeded.<br>If you wish to receive a pop-up message each time a budget is exceeded users with the appropriate security access can open the Configure \| Agency \| Options # 2.<br>1. Place the screen in Edit Mode<br>2. Tick in the check-box Check budget when saving invoices<br>3. Save |

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| **Meetings – AGM Preparation** | To customise the production of reports using the AGM Preparation screen you are now able to configure the order in which the reports are produced and whether the table of contents is included.<br>To change the sort order, or exclude the Table of Contents:<br>1. Open the Manage \| AGM Preparation Configuration screen<br>2. Select the report to move<br>3. Click the up / down arrows as required<br>4. Un-tick the check-box if you want to exclude the table of contents from the AGM Reports<br>5. Save |
| **Meetings – Agenda/Minute Merge Fields** | There are five new merge fields which are available for use when producing a meeting agenda or minutes.<br>The merge fields can be selected from the Association Type Meeting Template, Agenda screen and Minutes screen.<br>• Body Corporate Name<br>• Previous levy year start<br>• Previous levy year end<br>• Commission Received - Where the check-box has been ticked to account for commission on active policies the value recorded in commission received will be displayed.<br>• Compliance Type - A grid will displays the Compliance Type, Inspection Due Date and Last Inspection Date. |
| **Meetings – Multiple Minute Resolutions** | When configuring meeting templates you are able to setup multiple minute templates against each motion.<br>This option is also available when creating an agenda for a meeting.<br>To add additional minute resolutions:<br>1. Select the motion to edit<br>2. Click the R icon on the Configuration, or Meeting Agenda screen to launch the Meeting Template Resolution Configuration screen<br>3. Click the + to add alternate resolutions<br>4. Save<br>Where alternate resolutions are created in the configuration screen they can then be edited or deleted when creating a meeting agenda for an Owners Corporation.<br>You are also able to create alternate resolutions for motions at a meeting level.<br>When merging a meeting agenda any merge fields used in the alternate resolutions will be merged.<br>These additional resolutions can then be selected in the Meeting Minute screen in STRATA Master, as well as in MEETING Master.<br>This will result in more time savings as well as improving the consistency of minutes. |
| **Meetings – Distribution History** | When you issue meeting agendas and/or minutes from the Meeting Wizard the distribution details will be recorded.<br>Where the Create Notice / Complete Minutes task has been completed the Issue button on the Agenda/Minute Wizard is displayed as Issued.<br>To view the meeting distribution history:<br>1. Open Registers<br>2. Select the Meetings tab<br>3. Open the Meeting Wizard for the Owners Corporation<br>4. Select Create Notice or Complete Minutes (as required)<br>5. Select Issued<br>The date, time and user who issued the documentation is displayed at the top of the screen.<br>You are also able to view the method by which the document was distributed.<br>Where notices are emailed the recipients email address(es) are shown.<br>**Notes:**<br>• Where the document has been sent more than once the arrows at the bottom of the screen will allow scroll through and view each record.<br>• Where more than one recipient is shown in the Email address column, the column width can be expanded to view all recipient email addresses.<br>• If a user completes the agenda/minute task on the Meeting Wizard without issuing the document, the screen will display Not Issued when selected.<br>• Document distribution is only recorded for documents issued from version 7.5 onwards. All other previous meetings will display Not Issued. |

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| **Owner & Executive Portals – Enforce Reply to Email address** | You are now able to configure your Owner & Executive Portals to enforce owners to record a Reply to Email Address when contact is made to your agency from the portal.<br>To configure this setting:<br>1. Launch the STRATA Master - Configuration Tool under Configure > Communicator Configuration.<br>2. Select the Customisation tab<br>3. Tick the checkbox Enforce Reply to Email Address<br>4. Save<br>Once this setting has been changed any contact made from the portal will require the owners and executives to record an email address. |
| **Owner Invoices by Email** | Users are able to issue owner invoices via email as an alternative to printing and posting invoices.<br>There are three ways in which an invoice can be emailed from STRATA Master.<br>**Miscellaneous Owner invoice Screen**<br>This screen is used to create a one off invoice for a lot, which is to be issued immediately as at today's date.<br>You are now able to record the invoice details and click the Email icon which will then attach a .pdf copy of the invoice to an email.<br>• The To email recipient is pre-populated with the levy recipient's primary email address.<br>• The Bcc email recipient is pre-populated with the levy recipient's additional email address(es).<br>• If you select Email and there are no email addresses recorded against the levy notice contact To and bcc will remain blank and you may complete this manually.<br>• Click to the Save icon to issue the invoice at a later time through the Levy Wizard.<br>**Multiple Owner invoice Screen**<br>This screen has been modified to display the default levy delivery method on the right side of the grid.<br>Where the levy delivery method is set to print and a primary email address is recorded for the levy contact, the delivery method for the invoice may be changed to email. Note: This will not change the default setting.<br>Click the Issue icon to save and print/email the invoices by the method displayed on screen.<br>The emails will be automatically sent to the levy notice recipient(s).<br>• The To email recipient is pre-populated with the levy recipient's primary email address.<br>• The Bcc email recipient is pre-populated with the levy recipient's additional email address(es).<br>• Where Use levy email template is configured in Stationery Configuration the Owner invoice email template will be used.<br>**Levy Wizard**<br>• Print Invoices has been updated to Issue Invoices.<br>• When issuing owner invoices through the levy wizard the default levy delivery method for each lot will be used.<br>• If you do not wish to email owner invoices, you may select "Print all" for delivery method on the last screen of the Levy Wizard.<br>• Where a management fee has been configured for the agency under "Email levy notices" it will be applied to emailing invoices as determined by the user on the last page of the levy wizard. |
| **Owner Invoices by Email - Template** | Where a template is used for Emailing levy notices (Set in Configure > Agency > Stationery) STRATA Master will use a template named OwnerInvoiceEmailTemplate.txt<br>The template may be customised by navigating to your \\templates folder on your network and editing the text in Notepad.<br>The following merge fields are available for use:<br><MESSAGELINE1> = Invoice Due Date<br><MESSAGELINE2> = Manager's Name<br><MESSAGELINE3> = Plan Number |

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| **Owner Invoices for Sub-metering by Email** | **Meter Setup**<br>When setting up meters for an Owners Corporation for the purposes of issuing sub-metered invoices you may now select the default delivery method for the invoices.<br>Once the Contact to invoice has been selected, where an email address is recorded in the primary contact details the delivery method can be set to email.<br>Where no email address is recorded for the selected recipient if you have selected email, it will revert to Print when saving.<br>**Issuing Invoices**<br>To issue invoices using the default delivery method, enter the details and select Print Preview.<br>The print preview report has been changed to display the recipient contact type and their delivery method.<br>Select the Save and Issue icon to distribute the notices using the default delivery method displayed on the preview report.<br>**Notes:**<br>• All contacts will be set to receive sub-metered invoices by Print when upgrading to version 7.5. |
| **Owner Invoices for Sub-metering by Email - Template** | Where a template is used for Emailing levy notices (Set in Configure > Agency > Stationery) STRATA Master will use a template named SubmeterInvoiceEmailTemplate.txt<br>The template may be customised by navigating to your \\templates folder on your network and editing the text in Notepad.<br>The following merge fields are available for use:<br><MESSAGELINE1> = Invoice Due Date<br><MESSAGELINE2> = Manager's Name<br><MESSAGELINE3> = Plan Number |
| **Reminders** | Three new reminders have been added:<br>**Insurance Commission**<br>This reminder can be configured to produce a reminder for receiving insurance commission.<br>Where the Record Commission check box is ticked for an insurance policy and an amount is not entered in the commission received field the reminder will be displayed based on the number days after payment date.<br>**Change of Ownership**<br>This reminder can be configured to produce a reminder for the change of ownership for a lot.<br>The reminder is triggered based on the number days after the status certificate issued date and the date of entry for the lot.<br>**Levies not posted to the general ledger**<br>This reminder can be configured to produce a reminder where a standard levy has not been posted to the general ledger.<br>The reminder is triggered based on the levy frequency and the last standard levy posted.<br>**Note:**<br>• This is similar to the 'Levies not posted' displayed at the end of the Levies due report except it will show all unposted levy instalments, whereas the Levies due report will only display the last unposted levy instalment. |
| **Repairs & Maintenance – Quick Work Order** | A new icon has been added to the main toolbar called Quick Work Order which will launch a new screen which allows you to enter all information on a one page to create and issue a Work Order.<br>All existing work order defaults and rules are applied to this screen. When the work order is saved an Owners Corporation diary entry will be automatically created.<br>To update, or edit the work order after saving, the work order can be opened from the Reminders or Diary screen.<br>**Note:**<br>The screen is only for creating work orders.<br>If you require to issue quote requests you should create the Owners Corporation diary entry and then proceed to record the Job Details and issue quote requests. |

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| **Repairs & Maintenance – Default access contact** | There have been a number of changes to the R&M default contact to allow for more flexibility when setting up the contact.<br>• Preferred and Contracted tradespeople have been added to the selection available in the Contact Selector.<br>• Caretakers recorded in the Contract Register have been added to the selection available in the Contact Selector.<br>• The R&M default access contact details can now edited to allow details to removed or updated for the sole purpose of access contact.<br>• Where additional contact details are recorded they will be populated from the Contact Selector.<br>**Note:**<br>Any contact details for the default access contact with the exception of the contact name may be edited on the Manage \| Repairs & Maintenance screen. |
| **Reporting – New Report Viewer** | All formatted reports are now previewed using an updated Report Viewer.<br>In addition to the existing options to save in different formats there are also additional viewing options in the Report Viewer toolbar.<br>**Notes:**<br>• This Report Viewer resolves an issue where only one copy of a report would be printed regardless of the number entered on the printer control.<br>• The same Report Viewer had been introduced in Version 7.0 for the purpose of previewing the Reminders. |
| **Screen Resolution** | The maximum screen resolution for STRATA Master windows has been increased to 1280 x 720. |
| **Other Changes** | The following issues have been rectified in this version:<br>**Lot Details Report**<br>Where contact details were recorded for each contact type, in addition to mortgagees the report was not always being printed correctly.<br>**Detailed Arrears Report**<br>When the report was sent to a printer a blank page was being printed.<br>**Issue Executive Meeting Documents - SQL Versions**<br>Users were unable to issue committee meeting agendas and minutes where the strata database was running on SQL 2012 or SQL 2014. |