



STRATA Master Version 9.1 Release Notes

STRATA Master Version 9.1.2 Release Notes

Corp – Committee	A change has been made to allow a lot to be self-nominated on the committee tab.
Corp – Primary and Utility lots	<p>When recording details in regard to a property you are now able to record the number of primary and utility lots.</p> <p>The information is displayed at the top of the Corp screen, to the right of Registered and Total lots.</p> <p>When upgrading, Primary lots will be prep-populated with the total number of registered lots on each plan. To update the number of Primary and Utility lots:</p> <p>Place the Corp screen in Edit mode</p> <p>Record the number of Primary and Utility lots</p> <p>Save</p> <p>The primary and utility lot values can be viewed in Quick reports – Corporations, in the columns to the right of lots.</p> <p>Note: Where the total primary plus utility lots is not equal to the total number of registered lots a message will be displayed on saving, and a warning message will be displayed on the Corp – General tab.</p>
Mandatory Audit Report	Quick Report – Corporations Calculate Mandatory Audits for NSW has been updated to calculate the audit requirement based on the number of primary lots, not registered lots.
Meeting Attendance Register <i>Show tenant option</i>	<p>A new option has been added to the Meeting Attendance Register to Show tenant details on the report.</p> <p>Where a valid tenant is recorded on a lot the name of the tenant will be displayed directly under the Owners' contact name on the report.</p> <p>Note: Vote will always default to No.</p>
Other Changes	<p>The following issues have been resolved:</p> <p>When running Quick Reports – Meetings – Show plans with 50% or more valid tenancy Print Preview and Print Report had not been activated.</p> <p>The Statement of Key Financial Information was not reporting Income accurately or displaying correctly where the report was more than one page per fund.</p> <p>Issuing a Section 184 could not be completed where the Funding Proposal was recorded in a particular format.</p> <ul style="list-style-type: none"> • When recording a lease commencement date, you are now able to

	<p>record a future date.</p> <ul style="list-style-type: none"> The Strata Roll Report will now display the local term in Terminology for Executive Committee.
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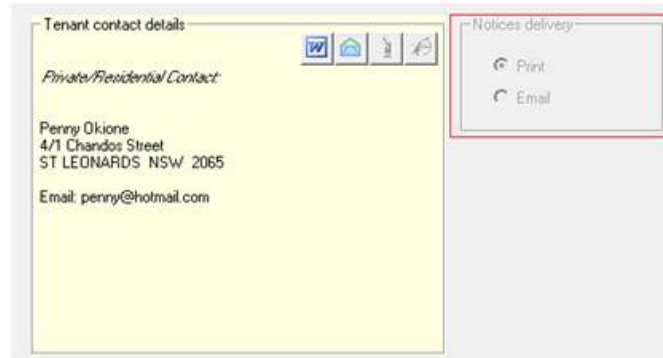
STRATA Master Version 9.1.1 Release Notes

Database Change – Column size	To accommodate the change in terminology from Sinking Fund to Capital Works Fund the size of the columns for in the Account and Standard Fund Account tables has been increased for the Name and Description columns.
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STRATA Master Version 9.1.0 Release Notes

Knowledgebase	<p>All users will now have direct access to the STRATA Master Knowledgebase without the need to enter credentials.</p> <p>A new option is now available to access the STRATA Master Knowledgebase from the Help icon in the Toolbar, in addition to the existing option in Help > Rockend Website > Knowledgebase.</p> 																																																																								
Corp – Committee <i>Record the nominator</i>	<p>A new column has been added to the Committee tab on the Corp screen named Nominated by.</p> <table border="1" data-bbox="582 1220 1259 1310"> <thead> <tr> <th>From Unit & Lot #</th> <th>Position</th> <th>Name</th> <th>Nominated By</th> <th>Reports</th> <th>Method</th> <th>Address</th> <th>Home phone</th> <th>Work phone</th> <th>Mobile</th> <th>Fax</th> <th>Email</th> </tr> </thead> <tbody> <tr> <td>1, Lot 1</td> <td>Secretary</td> <td>Ms Rosemary Brown</td> <td>None</td> <td><input checked="" type="checkbox"/></td> <td>Email</td> <td>76 Green Street, Murrumbidgee, NSW 25</td> <td>0437 2323</td> <td></td> <td></td> <td></td> <td>rosema</td> </tr> <tr> <td>5, Lot 5</td> <td>Chairman</td> <td>Mr Al Spiteri</td> <td>None</td> <td><input checked="" type="checkbox"/></td> <td>Email</td> <td>Chardon Towers, 6/1 Chardon Street, ST L</td> <td>0666 0000</td> <td>0402 486 999</td> <td>0666 0522</td> <td></td> <td>al@al</td> </tr> <tr> <td>10, Lot 10</td> <td>Member</td> <td>Mr Tony Mitchell</td> <td>None</td> <td><input checked="" type="checkbox"/></td> <td>Email</td> <td>87/1012 Sussex Street, Sydney NSW 200</td> <td>4956 7303</td> <td>8799 9205</td> <td>0412 374 434</td> <td></td> <td>tony@</td> </tr> <tr> <td>4, Lot 4</td> <td>Treasurer</td> <td>Ms Sarah Morgan</td> <td>None</td> <td><input type="checkbox"/></td> <td></td> <td>250 Willoughby Road, Willoughby NSW 2060</td> <td></td> <td></td> <td></td> <td></td> <td>sarah@</td> </tr> <tr> <td>5, Lot 5</td> <td>Member</td> <td>Mr Murray James</td> <td>None</td> <td><input checked="" type="checkbox"/></td> <td>Email</td> <td>12 Bank Lane, North Sydney NSW 2060</td> <td>3944 3848</td> <td></td> <td></td> <td></td> <td>murray</td> </tr> </tbody> </table> <p>When adding a new committee member you are now able to record which lot nominated the member.</p> <p>When upgrading any existing committee members will have the new field set to None.</p> <p>You are able to edit any existing members to record which lot nominated them to be elected to the committee.</p> <p>When recording a new member on the committee the Nominated by record must be selected. Selection criteria includes any other lot in the plan or None.</p> <p>The Nominator is displayed on the existing Committee Report and on the new Committee Meeting Attendance Register.</p>	From Unit & Lot #	Position	Name	Nominated By	Reports	Method	Address	Home phone	Work phone	Mobile	Fax	Email	1, Lot 1	Secretary	Ms Rosemary Brown	None	<input checked="" type="checkbox"/>	Email	76 Green Street, Murrumbidgee, NSW 25	0437 2323				rosema	5, Lot 5	Chairman	Mr Al Spiteri	None	<input checked="" type="checkbox"/>	Email	Chardon Towers, 6/1 Chardon Street, ST L	0666 0000	0402 486 999	0666 0522		al@al	10, Lot 10	Member	Mr Tony Mitchell	None	<input checked="" type="checkbox"/>	Email	87/1012 Sussex Street, Sydney NSW 200	4956 7303	8799 9205	0412 374 434		tony@	4, Lot 4	Treasurer	Ms Sarah Morgan	None	<input type="checkbox"/>		250 Willoughby Road, Willoughby NSW 2060					sarah@	5, Lot 5	Member	Mr Murray James	None	<input checked="" type="checkbox"/>	Email	12 Bank Lane, North Sydney NSW 2060	3944 3848				murray
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Corp + Lot Owner screen <i>Update warning messages</i>	<p>A new warning message will be displayed on the both the Lot Owner screen and Corp screen for any plans / lots where the nominator lot has changed ownership.</p> <p>The warning on the committee members' lot where their nominators' lot has changed ownership will read: Committee member nomination for this lot may be out-of-date.</p> <p>The warning on the Corp screen will include reference to the members' lot number.</p> <p>This warning will no longer be shown once the committee record is edited, or when the member is removed from the committee.</p>																																																																								

A new option named **Notices delivery** has been added to the Agent/Tenant/Leases tab



Lot Owner Screen

Tenant Notice delivery method

This option is used to determine the tenants' preferred delivery method for Mail Merge documents created through the Meetings data source.

On upgrade, all tenants will default to delivery method of **Print**.

Where a valid primary email address is recorded for the tenant contact a delivery method of **Email** may be selected.

NOTE: This delivery method will also be utilised when NSW agencies Issue Notices to tenants.

Levy Wizard Messaging

Set Agency and/or plan defaults

There are two new configuration screens available which will allow you to create default messages to be included on any of the following notices issued through the Levy Wizard:

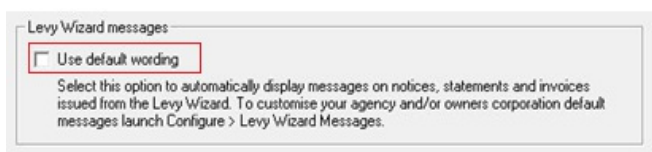
- Levy Notice
- Issue Statement
- Debt Recovery (Manual and Staged without template)
- Owner Invoice
- Submeter Invoice

Users with the required security access to the Configuration menu should complete the following steps to utilise default levy wizard messages from the Levy Wizard.

Setup Messages

Configure > Agency > Option # 3

Place the screen in Edit mode, tick the checkbox labelled **Levy Wizard Messages**, and Save.



Configure > Levy Wizard Messages > Agency

Place the screen in Edit mode and record default messages for each notice type, and Save.

This will establish a default message for notices issued from the Levy Wizard.

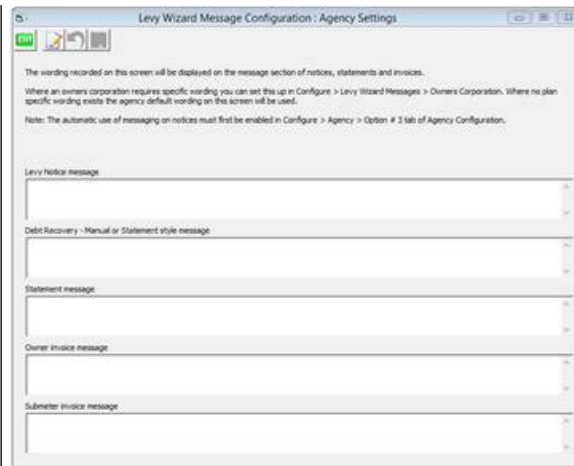
Configure > Levy Wizard Messages > Owners Corporation

Select the Owners Corporation, place the screen in Edit mode, record default messages for each notice type, and Save.

This will establish any plan specific messages for notices issued from the Levy Wizard.

Levy Wizard Messaging

Set Agency and/or plan defaults



Utilising Default Messages

When issuing any of the five notice types (listed above) the messages will be produced based on the following priority:

The wording will be based on the Owners Corporation configuration

- Where no Owners Corporation message is set, the agency message will be used.
- Where no Agency message is recorded users may continue to manually record a message.

When issuing notices for an individual plan, the default wording will be displayed in the **Additional comment for notices** text box.

Where agency default messages exist a label will be shown on screen Agency default exists

When issuing notices any text which is manually recorded in the additional comments box will be displayed on the notices.

NOTE: Where the font/size is set to MS Sans Serif - 10 pt you are able to display 736 characters including spaces in the message.

Macquarie Bank - DEFT Update

Australia Post surcharge

In response to recent price increases by Australia Post, Macquarie Bank have introduced a \$2.75* processing fee to owners who pay DEFT levy notices by Post Billpay at an Australia Post outlet.

The following changes have been made:

Bank Configuration

The Post Billpay transaction identifier recorded for Macquarie Bank has been changed to 442, as instructed by the Bank.

MBL levy notice slip


When issuing this notice type the Post BillPay barcode will read an amount due of \$2.75 more than the amount shown in the **Amount Due** section of the notice.

Additional wording is shown on the notice to advise owners of the processing fee.

Flexible Payment Slip

When issuing this notice type the Post BillPay barcode will read an amount due of \$2.75 more than the amount shown in the **Amount Due** section of the notice.

Any pre-printed stationery stock will need to be updated to display the wording: Payments made at Australia Post will incur a \$2.75 DEFT processing fee.

	<p>Deposit Slips – Barcode & OCR</p> <p>Any deposit slips produced for payment at Australia Post will also incur the processing fee.</p> <p>It is important that when making deposits through Australia Post that the surcharge is paid on top of amounts pre-receipted into STRATA Master to ensure you receive the full amount of the receipt into the bank account.</p>
<p>Publish General Meeting Document on Portals</p>	<p>When auto-archiving General Meeting documents from STRATA Master to fileSMART you may now elect to publish the document(s) to the Owners and/or the Committee.</p>
<p>Registers - Contracts</p> <p><i>Date and Notification Sent</i></p>	<p>There have been two new columns added to the Contracts Register to allow users to record if a Reminder has been issued to the Committee and/or Owners to advise them of the contract expiring.</p> <p>The columns are named:</p> <ul style="list-style-type: none"> • Communication sent • Date sent <p>The two new columns are also displayed in the Quick Report – Registers ~ Show contracts</p> <p>A new Reminder has been created for the notifying of Committees and/or Owners prior to the expiry of an Agency Agreement.</p> <p>To allow immediate use of the new Reminder, during upgrade the Communication sent column for Agency Agreements will be set to No.</p>
<p>Update Status Certificate Workflow</p> <p><i>Report and record arrears</i></p>	<p>When issuing a Status Certificate STRATA Master will now record the plan / lot number, name of requestor and the date and time the certificate was produced.</p> <p>This detail can be viewed in Quick Reports – Lots ~ Show status certificate history.</p> <p>To simplify the process of updating levy arrears for settlement a new workflow can be initiated from the Lot Owner screen to calculate the arrears as at the settlement date.</p> <p>Lot Owner Screen</p> <ul style="list-style-type: none"> • In Read Only, or Edit mode Select the Update Certificate button. • The name of the last requestor and the date of that request (for the selected lot) is displayed on the Update screen.  <ul style="list-style-type: none"> • Enter the Date of Settlement and Click OK
	<ul style="list-style-type: none"> • A Current Owner Account will be produced for the lot calculating the interest to the

date of settlement, and including any levies which fall due by or on that date in the total balance.



Strata Management
PO Box 99999
SYDNEY NSW 2000
Ph: +61 2 4141 4141
Fax: +61 2 4141 4142
admin@lookalmystrata.com.au

Current Owner Account

Ms Sarah Jane Morgan

Lot 4 Unit 4

The Owners Of SP 4444

Chandos Towers, 1 Chandos Street, ST LEONARDS NSW 2065

Purchased: 04/06/2008 UE/AE: 55.00 / 550.00

Date	Details	Administrative Fund due/paid	Capital Works Fund due/paid	Unallocated	Interest paid	Total	Balance ()/repaid
	Balance brought forward	0.00	0.00	0.00		0.00	0.00
01/01/2015	Quarterly Admin/Sinking Levy	550.00	200.00	0.00	0.00	750.00	750.00
02/03/2015	Levy payment for 4/4444	-640.96	-196.71	0.00	12.33	-750.00	12.33
01/04/2015	Quarterly Admin/Sinking Levy	550.00	200.00	0.00	0.00	750.00	782.33
03/04/2015	Levy payment for 4/4444	-18.25	-6.64	0.00	0.11	-25.00	737.44
04/05/2015	Levy payment for 4/4444	-640.79	-196.66	0.00	0.00	-737.44	0.00
01/07/2015	Quarterly Admin/Sinking Levy	550.00	200.00	0.00	0.00	750.00	750.00
01/08/2015	Levy payment for 4/4444	-550.00	-200.00	0.00	0.00	-750.00	0.00
01/10/2015	Quarterly Admin/Sinking Levy	550.00	200.00	0.00	0.00	750.00	750.00
01/01/2016	Quarterly Admin/Sinking Levy	825.00	166.00	0.00	0.00	990.00	1,740.00
11/02/2016	Levy payment for 4/4444	-724.71	-234.94	0.00	40.36	-1,000.00	780.36
01/04/2016	Quarterly Admin/Sinking Levy	825.00	166.00	0.00	0.00	990.00	1,770.36
02/05/2016	Fire Safety Updates as per Inspection Requirements	0.00	3,000.00	0.00	0.00	3,000.00	4,770.36
01/07/2016	Quarterly Admin/Sinking Levy	825.00	166.00	0.00	0.00	990.00	5,760.36
04/07/2016	Lot 4: Interest on arrears to 04/07/2016	24.75	0.00	0.00	0.00	24.75	5,785.10
04/07/2016	Lot 4: Interest on arrears to 04/07/2016	0.00	4.95	0.00	0.00	4.95	5,790.05
04/07/2016	payment received	-650.29	-130.06	0.00	0.00	-780.35	5,009.70
01/10/2016	Quarterly Admin/Sinking Levy	825.00	166.00	0.00	0.00	990.00	5,999.70
08/11/2016	Current balances excluding interest						
	Administrative Fund		2,499.75				
	Capital Works Fund		3,499.95				
	Unallocated Money Fund		0.00				
			5,999.70				
	Interest due as at 21/11/2016		282.94				
	Current balance including interest		56,282.64				

Update Status Certificate Workflow

- The date and the amount payable are recorded in STRATA Master and can also be viewed in Quick Reports – Lots ~ Show status certificate history.

Report and record arrears

Plan #	Lot #	Unit #	Lot Address	Name of Requestor	Status Certificate Issued	Amount Due	Date of Settlement
4444	4	4	Chandos Street 1 Chandos Towers	Conveyancing Company	21/10/2016 5:19:41 PM		
4444	4	4	Chandos Street 1 Chandos Towers		08/11/2016 5:48:53 PM	\$6,282.64	21/11/2016

IMPORTANT NOTE: This report differs from the Current Owner Account produced from Formatted Reports as the manually created report will calculate interest on arrears, but will not bring levies to account which fall due between the date of running the report and the date of settlement.

NSW Legislation

Terminology

Sinking to Capital Works Fund

There have been changes made throughout the application to refer to the Capital Works Fund, previously known as the Sinking Fund.

Reports, messages and on screen labels have been updating to ensure the correct terminology is used consistently throughout the program.

NOTE: We have not made changes to any transaction records in STRATA Master, so where levies have been posted using the term 'Sinking Fund' these are unchanged.

Executive Committee is now referred to as the Strata Committee. The change to the Local term in Terminology has been completed on upgrade for all New South Wales clients.

Agency Agreement Reminder

A new Reminder has been added to allow agencies to track if the required notice has been provided to the Committee/Owners in regard to an upcoming agency agreement expiry.

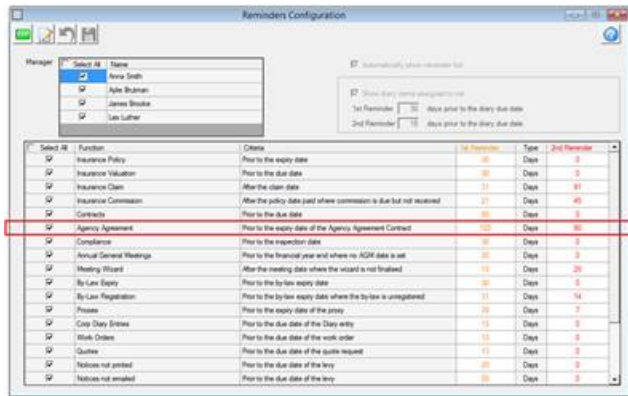
To utilise the new Reminder you must first ensure that your Agency Agreements are recorded in the Contracts Register.

When your contracts are recorded, you must then launch Manage – Reminders and update your preferences to include the Reminder and change the default alerts if required.

The default settings are:

- 1st Reminder - 120 days prior to the expiry date of the contract
- 2nd Reminder – 90 days prior to the expiry date of the contract

The trigger for the Reminder is the Communication Sent is in the Contracts Register is **No**



Agency Agreement Reminder

Cont...

You are able to identify the type of Reminder by looking in the Function column, and this will show whether it is the Agency Agreement notification which is overdue, or the Contract itself.



You may continue to monitor the Agency Agreement expiry through the Reminders by ticking the Contracts to also be tracked.

To facilitate the running of Strata Committee Meetings a new report has been added to the Formatted Reports Menu, under Strata Mgt Reports called **Strata Committees Meeting Attendance**.

Committee Meeting Attendance Report

When producing the report you must select:

- Owners Corporation
- Meeting date
- Arrears cut off date

The report will show the following details:

- Lot / Unit number for the Member
- Contact name
- Position on the Committee
- Voting rights Name on Title
- Nominators lot number
- Lot arrears / prepaid as at the arrears cut off date

Strata Management
22 Wescott Lane, LIVEPOOL, NSW 2170
Phone: +61 2 4141 4141
Fax: +61 2 4141 4142
admin@stratamgmt.com.au

Strata Committees Meeting Attendance
Meeting date: 12/12/2016
Arrears cut-off date: 24/11/2016

Lot	Unit	UE Contact name	Position	Vote	Name on title	Lot Arrears	Nominated Arrears
					Nominated by	(Unpaid)	(Unpaid)
2	2	200.00 Vito Miorinhe	Secretary	Yes	Muller Car Nominated by Lot 4	0.00	0.00
1	1	200.00 Vito Oro	Chairman/Treasurer	Yes	No Arrears Nominated by Lot 3	0.00	0.00
Total						0.00	0.00

NOTE:

- Voting is determined using the financial status of the members lot and the nominators lot as at the arrears cut off date
- Where the nominators' lot is recorded as **None** the financial status is determined only on the members lot.

Corp - Record Payment Plan

The new Act allows an Owners Corporation to determine if they wish to offer payment plans to owners.

To enable the recording and reporting of this information additions have been made to the Financial tab on the Corp screen.

To record Payment Plan details, place the Corp screen in Edit mode, Select the checkbox and record the details of the Payment Plan in the text box provided, then save.

Debt Recovery

Exclude all lots from debt recovery

Debt collector
ban Bannermans Lawyers

Payment Plan approved

Payment Plan conditions

This information can be queried and viewed in Quick Reports – Corporations.

The new Act requires the Information Certificate (Section 184) to provide a method to fund Capital Works where the funding plan has not been adhered to.

To enable the recording and reporting of this information on a plan basis in the Section 184 Certificate, additions have been made to the Financial tab on the Corp screen.

Corp - Record Funding Proposal Plan

To record Funding Proposals, place the Corp screen in Edit mode, Select the checkbox and record the details of the Funding Proposal in the text box provided, then save.

The details recorded in the text box will be merged into the Section 184, Section 7 utilising the merge field << fundingproposal >>.

This information can be queried and viewed in Quick Reports – Corporations.

Corp - Record Strata Renewal Committee

The new Act allows an Owners Corporation to appoint a Strata Renewal Committee.

To enable the recording and reporting of this information additions have been made to the Financial tab on the Corp screen.

To record if a Strata Renewal Committee has been formed and to record any details in regard to the Committee, place the Corp screen in Edit mode, Select the **Strata Renewal Committee** checkbox and record the details of the Committee in the text box provided, then save.

The details recorded will be merged into the Section 184, Section 1 utilising the merge fields <> will display Yes or No based on the checkbox and <> will merge the comments recorded in the text box.

This information can be queried and viewed in Quick Reports – Corporations.

Mandatory Audit Report

Section 95 (4) of the Act requires any plans with an Annual Budget of \$250,000 or more or 100 or more registered lots to complete a mandatory audit at the end of the financial year. Part 3 – Clause 21 of the Regulations expand on the way to calculate the Annual Budget, where the plan does not have 100 or more registered lots.

In many cases it will be simple to make this determination, for example where there are more than 100 registered lots or where they have bank balances or levies due totalling more than the \$250,000 threshold.

To easily produce a list of plans which require a Mandatory Audit STRATA Master will take all opening cash balances **less** prepaid levies **plus** receipts and any unpaid levies for the financial year.

A new output has been added to Quick Report – Corporation named **Calculate Mandatory Audits for NSW**.

Plan No.	Financial year end	Mandatory audit	Audit Reason	Jurisdiction	Lots	Manager
2222	2017-06-30	Yes	\$277 480.00	NSW	4	Law Luffen
2232	2017-06-30	Yes	100 Registered lots	NSW	100	James Brooker
5999	2016-06-30	No	No criteria met	NSW	11	James Brooker
4444	2016-12-31	No	No criteria met	NSW	10	Anna Smith
9945	2016-12-31	No	No criteria met	NSW	9	James Brooker

Quick Reports - Corp

To produce a list of plans requiring the mandatory audit, enter a financial year end (in the past).

To report on multiple year ends, you can enter each year end to be reported and select

the **Add to search** icon.

All plans with a financial year end matching the date entered (date and month only) will be displayed providing two columns identifying:

- **Mandatory Audit Required** column displays Yes or No
- **Audit Reason** column will display the method used to reach the outcome, as shown below.

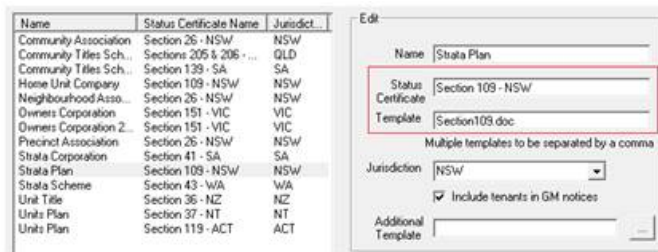
Criteria	Audit Req'd	Audit Reason
< 100 registered lots + < \$250,000	No	No criteria met
> 100 registered lots + < \$250,000	Yes	# Registered lots
< 100 registered lots + > \$250,000	Yes	\$\$ calculation
> 100 registered lots + > \$250,000	Yes	# Registered lots

The new Act has introduced a new Form to be issued when a Strata Information Certificate (previously known as Section 109) request is received.

The new template Section184.doc has been included in the Templates folder when upgrading. This new template **has not** been attached to the Association Type Strata Plan-NSW as you may wish to customise the template prior to use.

To change the default template used when issuing a Status Certificate users with the required security access to the Configuration menu should launch the Association Type screen and complete the following steps:

- Place the screen in Edit mode
- Click on any Association types setup for Strata Plan – NSW
- Update **Status Certificate** to Section 184 - NSW
- Update **Template** to the name of the template file e.g Section184.doc
- Save



Status Certificate

Section 184

When launching the report from the Formatted Reports menu, if you wish to update the name of the report users with the required security access to the Configuration menu should launch the Terminology screen and complete the following steps:

- Place the screen in Edit mode
- Click on any Status Certificate in the Standard term column
- Update **Status Certificate** to Section 184
- Save

The new merge fields included in the template are as follows:

<< fundingproposal >> - Details recorded in Corp – Financial

<< StrataRenewalCommittee >> - Details recorded in Corp – Financial

<< StrataRenewalComment >> - Details recorded in Corp – Financial

<> - Lists unpaid owner invoice values

<> - Lists unpaid owner invoice dates

<> - Total of unpaid owner invoices

NOTE: The list of unpaid owner invoices is completed under Section 11 of Section 184.

This list excludes submeter invoices.

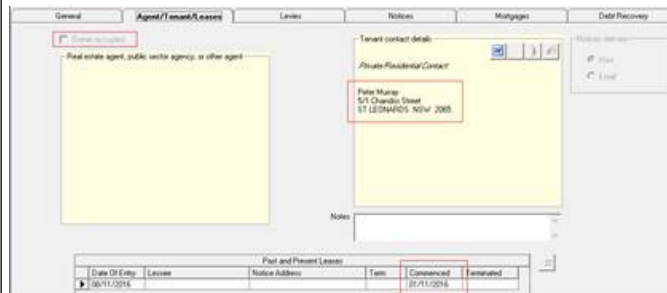
Tenants – What is a valid tenancy?

The new Act introduces new rights for tenants in Strata Schemes.

A number of changes have been made which allow a **valid tenant** to receive meeting notices and be included in a calculation to determine the requirement of a Tenant Representative on a plan by plan basis.

A valid tenant in STRATA Master is based on the following criteria associated with the Agent/Tenant/Leases tab on the Lot Owner Screen

- **Owner occupied** checkbox is not ticked
- **Commencement date** for a lease is recorded against the lot
- **Tenant contact details** are recorded



Quick Reports – Meetings

Where more than 50% of registered lots in a Strata Plan have a valid tenancy, a Meeting of Tenants may be held to elect a Tenant Representative to be part of the Strata Committee.

As the Meeting of Tenants must be held prior to the Annual General Meeting, the method to determine if the meetings must be held has been added to the existing Quick Reports – Meetings search.

To view a list of plans which must hold a Meeting of Tenants select the new output option **Show plans with 50% or more valid tenancy.**

Identify plans with 50% or more tenancy

Any plans which have 50% or more lots with a valid tenancy and have a meeting scheduled in Meeting Register will be displayed.



To reduce the search results you may enter further criteria such as Meeting Type, Meeting

date and so on.

Reports - Mail Merge

The existing Mail Merge for Meetings has been expanded to include a new option **Show lots with a valid tenancy**.

This option will return a list of lots which have a valid tenancy, and will allow you to select Tenant contact details to create a Meeting notice if required.

This will enable you to issue a Meeting of Tenant notice via Mail Merge.

Where you need to differentiate recipients by delivery method you may select the relevant delivery method for the tenant contact.

Meeting of Tenants

Plan No	Lot No	Unit No	Lot Address	Lot Address	Lot Address	Lot Address	Name	Salutation	Address
2222	1	1	1/22 Wesc...	1/22 Wesc...	LIVERPOD...		Ma Ra Butt	Buttose	1/22 Wesc...
2222	2	2	2/22 Wesc...	2/22 Wesc...	LIVERPOD...		Michael Clark		1 Pansett...

Issue Agenda

Tenants in NSW Strata Schemes must now receive a copy of all general meeting notices, regardless of the percentage of tenanted lots. The Act allows for the delivery of these notices to be via the Notice Board but this will not be possible in all plans.

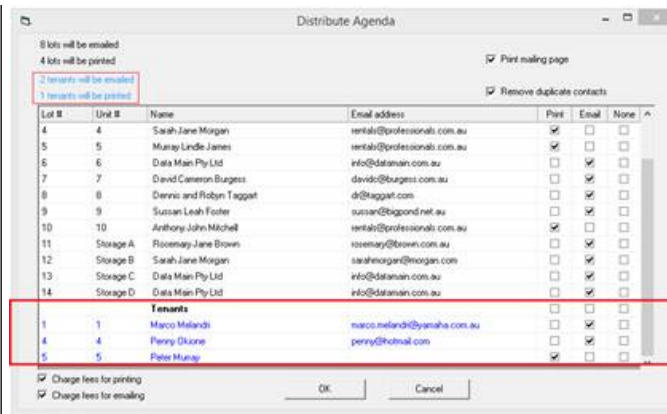
To enable tenants to receive a copy of a general meeting notice (excluding any meeting attachments) users with the required security access to the Configuration menu should launch the Association Type screen and complete the following steps:

- Place the screen in Edit mode
- Click on any Association types setup for Strata Plan – NSW
- Tick **Include tenants in GM notices**
- Save

Include Tenants

Name: Strata Plan
Status Certificate: Section 184 - NSW
Template: Section184.doc
Multiple templates to be separated by a comma
Jurisdiction: NSW
 Include tenants in GM notices
Additional Template: [icon]

When issuing an Agenda for any general meetings linked to an Association type with the **Include tenants in GM Notices** selected, the distribution list will display any valid tenants in the distribution screen.



Issue Agenda

The tenants are shown at the end after the owners, and will display the delivery method as selected for the Tenant contact on the Agent/Tenant/Leases tab on the Lot Owner Screen.

The tenant details are displayed blue as will the label count to help identify the tenants separate to the owners.

When sorting on the distribution screen the sort will be completed within the Owners list and Tenants list separately.

When issuing the notice STRATA Master will issue a notice with any attachments to Owners and a notice **without** attachments to Tenants.

Charges for printing and emailing agendas for tenants will apply at the same rate per page or per agenda charged for issuing owners agendas.

NOTE:

- When archiving the meeting notice, only a full copy of the notice (as issued to the Owners) is archived.
- If required, you may issue a full agenda to tenants via email by including them as **Additional contacts** on the notices tab.

~~• When printing an agenda the owners and tenants agendas will be sent to the printer.~~
The new Act now requires a new financial report to be distributed to Owners to be tabled at the Annual General Meeting. See the Help File for further details in regard to the new report.

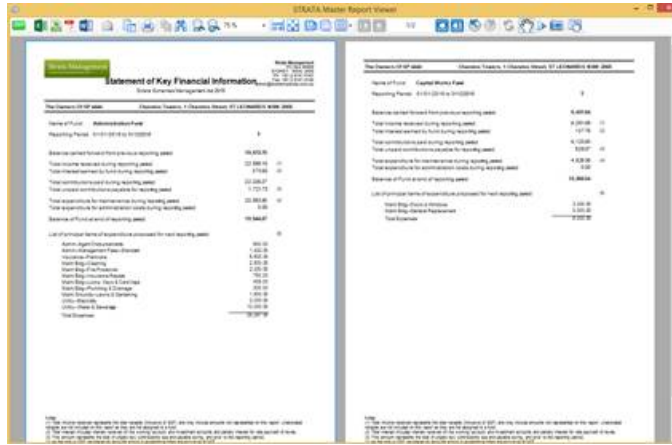
The Statement of Key Financial Information can be produced from either the Formatted Reports or AGM Preparation menu.

AGM Preparation defaults the report to be produced first, but the report is not selected by default.

To change the order or inclusion of AGM Preparation reports launch the Manage – AGM

Preparation screen and change as required.

Statement of Key Financial Information



Notes are recorded on the report to explain how the amounts are determined, and whether GST is included/excluded from the report based on the GST status of each Owners Corporation.

NOTE: When determining the total income for the period, STRATA Master excludes any receipts created during the opening balance process.

Other Changes

The following issues have been resolved:

<p>Opening Balance Entry – Preview Reports</p>	<ul style="list-style-type: none"> • After previewing financial reports where the user opts to change entries prior to posting, in some circumstances transactions were being removed in error.
<p>Deleting Agents or Tenants</p>	<ul style="list-style-type: none"> • Users were unable to delete an Agent or Tenant due to an error recording the action in the Audit Trail.