

Strata Master Version 12.0 including File Smart 7.11 Release

Training & Release Notes

File Smart Version 7.11 was released in conjunction with Strata Master Version 12.0 - Release notes are included in the Strata Master Release Notes below.

This document will cover the following:

- [Rockend Enhanced SMS Integration](#)
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Feature Summary

Rockend Enhanced SMS Integration

Strata Master Version 12 provides an Enhanced SMS Integration, which allows messages to be sent from within Strata Master via an online service.

All SMS sent via the integration are logged to ensure accountability and auditability, with sophisticated reporting also available from your Rockend SMS Online Platform.

You can send SMS communication to remind your owners about upcoming meetings, or alert them to the fact they have outstanding levies. Utilise the Bulk SMS function to quickly communicate urgent messages to all residents at a building.

You can send SMS to the following contacts within Strata Master:

- Owners
- Tenants
- Agents
- Residents
- Committee Members
- Notice Contacts
- Levy Contacts
- Creditors

Rockend Enhanced SMS integration provides a range of advanced features to assist in optimising SMS communication with your portfolio.

Schedule SMS: You can now schedule your SMS to be sent at a future date and time. These messages can also be setup as a recurring campaign.

Global SMS Templates: Use dynamic message templates with the ability to add merge fields to your SMS.

Multipart SMS: Increased message length means you have the freedom to say more when you need to.

Reply Options: You now have the ability to dynamically change your Sender ID and reply options per SMS.

Online Portal: Direct access is available to your Rockend SMS Online portal from within Strata Master.

Message History: View a history of messages sent and received for each Strata Master contact.

Sign up today by visiting the Rockend SMS website which includes useful videos and tutorials
<https://rockendsms.edgility.com.au/rockend-sms-for-strata-master/>

For detailed notes on using this feature please refer to the Enhanced SMS Integration Guide
<http://kb.rockend.com/help/enhanced-sms>

Improvements to SMS Functionality

Several improvements have been made to the existing SMS functionality in Strata Master.

Additional Contacts

A new preview screen will launch when sending SMS messages allowing you the option to include additional contacts.

Note: the displaying of additional contacts is dependent upon your configuration in Configure > Agency > Option #3

Contacts with an invalid mobile phone number or no mobile phone number will be displayed in red.

The diary entry in Strata Master will record if any additional contacts were included.

Bulk SMS – Diary Entry

When sending Bulk SMS messages from Strata Master, the Lot numbers are now recorded in the job details section of the diary.

Debt Recovery

A new option is available in your Debt Recovery configuration.

Selecting the 'Send Debt Recovery SMS messages to the Levy Contact' option will send all SMS messages sent via Debt Recovery to the Levy Contact (recorded on the Levies tab of the Lot Owner) instead of the Owner Contact.

Creditors

SMS messages can now be sent to Creditors from the Creditor's contact card (Manage > Creditors).

Note: Messages sent from the contact card will not be able to be charged to a strata plan.

SMS Menu

A new SMS icon has been added to the Strata Master toolbar to allow quick and easy access to the Rockend SMS Online Platform.

General Enhancements

Levy Email Address for Real Estate Agents

Ensure levy notices go to the right place with the new 'Levy Email Address' field for Real Estate Agents.

A 'Levy Email Address' field has been added to the Real Estate Agent contact card. This allows you to specify a different email address for levy notices only.

When this field is populated, any Levy or Debt recovery notices will be sent to this email address instead of the general email address, ensuring correspondence is delivered to the correct contact at the Real Estate Agency.

Portfolio Level Duplicate Invoice Warning

A new 'Check both amount and invoice number across the portfolio' option is available in your Agency Configuration > Option #2.

When this option is selected, Strata Master alert you to duplicate invoices within the specified number of days, when both the amount and invoice number have previously been entered against any plan in your portfolio.

Work Orders

A new option has been introduced to allow you add PDF attachments to Work Orders and Quick Work Orders. Attachments added in these screens will automatically be added as separate attachments when sending Work Orders via e-mail. This allows you to easily add accepted quotes to your work orders!

Mail Merge Wizard – Strata Manager's Contact Details

The following merge fields have been added to the Owners Corporation, Owners/Lots, Meetings and Committee Members data sources in the Mail Merge Wizard, removing the need to manually enter the Strata Manager's contact details.

- Manager Work Phone
- Manager Mobile Phone
- Manager Email

Meeting Wizard

A prompt has been added when selecting the 'Undo' button in the Meeting Wizard toolbar to ensure changes made to a meeting agenda or meeting minutes are not accidentally deleted and you don't lose all your work with a misplaced click.

Quick Reports

A new option is available in Quick Reports for Corporations to allow you to filter by Suburb. This is particularly useful for business evaluation and planning, allowing you to get a better understanding of where your portfolio sits geographically.

Diary

Inactive users in Strata Master have been removed from the drop-down box of the 'For action by' field when creating new diary entries

File Smart

New search fields are available when using File Smart Version 7.11 with Strata Master Version 12, making searching for an invoice even faster!

A field has been added in Archive view to record the Insurance Claim details associated with an invoice. The Insurance Claim field is also available in the Document Data tab in File Smart Workflow and is available as a search field when searching the Payments/Maintenance folder.

The following search fields entered into the Invoice tab in File Smart Workflow are now available when searching the Payments/Maintenance folder of a Strata Master database:

- Account Number
- Account Name
- Invoice Amount

These fields have also been added to the Archive view of the Payments/Maintenance folder for invoices that haven't been processed through File Smart Workflow.

Changes to Password Security

Several changes have been made to improve password security in Strata Master and the Owner and Committee Member portals.

Changes to the Web Access Wizard

The Access Password column has been removed from the Web Access Wizard, so that users can no longer see owner's passwords.

The 'Change Web Access Password' button has been replaced by a 'Reset Web Access Password' button.

Selecting the 'Reset Web Access Password' button will now generate a one-time temporary password that will be emailed to the owner. This temporary password will be valid for 7 days.

The Portal Activity Report has been updated to display 'Reset Password' instead of 'Request Password' to reflect changes to the functionality.

The Web Access templates have been updated to now include the temporary password, as well as instructions for the owner on how to use their temporary password to create a new password.

On upgrading there will be two new templates in your template folder:

- Web Access Notification Email Template_rename
- Web Access Notification Letter Template_rename

The new templates contain the new merge field for the temporary password, and the new instructions. You will need to review these templates, make any required changes and then remove '_rename' once you are happy for the template to be used.

Changes to the Mail Merge Wizard & Quick Reports

The web access password merge field has been removed from the Mail Merge Wizard.

The web access password column has been removed from Quick Reports > Contacts.

Changes to the Strata Portal

When an owner uses a one-time temporary password to login to the Strata Portal, they will automatically be required to create a new password.

The minimum password requirements on the portal have been updated. Passwords must now be between 8 and 15 characters, must contain at least one lowercase letter, one uppercase letter and one numeric digit.

Once an owner has successfully created a new password, they will be re-directed to the login screen.

When an owner selects the 'Forgot password and/or access code' link on the Strata Portal login screen, a new 'Reset Password' option is now available.

When an owner submits a password reset request, they will receive a one-time temporary password via email, which is valid for 24 hours. The owner will then need to follow the same steps outlined above to change their password.

If the owner's temporary password expires, they will be alerted to the fact and prompted to reset their password again.

Grid Changes

Several grids in Strata Master have been updated to facilitate the Enhanced SMS Integration.

In both the Registers and the Committee Member tab, instead of a dropdown box displaying results, a new pop up screen will display allowing you to make your selection.

Another notable change relates to resizing grid columns in Strata Master, you will now need to click into the gridfirst before the ability to drag the columns is enabled.

Defects Resolved

Trades Monitor: An error occurred when attempting to configure Trades Monitor for Creditor Compliance, when entering an Agency ID greater than 999 supplied by Trades Monitor. This issue has been resolved

Meeting Wizard: An error occurred when processing emails from the Meeting Wizard when two semicolons were present. This issue has been resolved.

Interim Reporting: When printing reports from the Interim Reporting function, when duplex printing is supported, the mailing page did not print on a separate page. This issue has been resolved.

Westpac Levy Notice: A spelling mistake has been corrected on the Westpac Levy Notice slip.

Bulk Communications Wizard: When selecting the Notice Contacts or Levy Contacts group in the Bulk Communications Wizard, the wizard was not including the additional email addresses recorded on the Notice & Levy tabs of the Owner Card. This issue has been resolved.

Levy Schedule Reports: When emailing the Levy Schedule or Levy Schedule Group Reports for an approved levy

schedule, the PDF attachment displayed as proposed levy schedule. This issue has been resolved.

Email Validation: When using Quick Reports to search for lots with invalid email addresses, email addresses with a comma entered in lieu of a full-stop were not displaying as invalid. This issue has been resolved.

Levy Wizard: When printing levy notices from the Levy Wizard, the label displayed as 'Print in lot order', this has now been corrected to read 'Print in unit order'.

Levy Discounts: When a levy discount had not been configured to a plan, but a discount was applied at the time of the levy posting, the levy notice did not display the discount. This issue has been resolved.

Agenda Wizard: When a motion was selected and then deleted in the Agenda Wizard, the previewed agenda continued to show the deleted motion. This issue has been resolved.

Group Reporting: When an Owners Corporation has no active groups configured, the message advising that groups are active no longer displays when processing a receipt in 'Other Receipt to Owners Corporation'

Terminal Server Environment: An error occurred when printing levies on a Terminal Server environment. This issue has been resolved.

FSCI Screen: When a user selected to close a work order and diary entry in the FSCI screen, the entries did not close. This issue has been resolved.

Cash Management Report: When producing the Cash Management Report with the option ticked to include 'show financial summary', the report did not record the correct receipts. This issue has been resolved.

Bulk SMS – Committee Members: When sending Bulk SMS messages from the Communications Wizard to Committee Members, the diary entry displayed 'Executive'. This issue has been resolved.

Voting and Web Access Templates: The Web Access and Voting templates have been updated to display the new Owner & Committee member portal URL. If you have previously made changes to these templates, you will need to manually change the portal URL to the following: <https://www.lookatmystrata.com.au/Login/>>

Victorian Legislation: For corporations in Victoria, the wording on levy notices, owner invoices, debt recovery notices and status certificates has been changed from 'Owners Corporations Regulations 2007' to 'Owners Corporations Regulations 2018'.

Web Access Wizard & Online Voting: An error occurred when processing emails from the Web Access Wizard and when sending Voting Invitations when two semicolons were present. This issue has been resolved.

Strata Master Toolbar: The keyboard shortcut added to the new SMS icon on the Strata Master toolbar was preventing the Windows undo function from activating. This issue has been resolved.

Maintenance Quotes: Quotes were not generating when sending via e-mail to a Creditor. This issue has been resolved.

FSCI Screen: An error generated when sorting by the creditor name in the FSCI screen. This issue has been resolved.

Bulk Communications Wizard: When selecting the Notice Contacts or Levy Contacts group in the Bulk Communications Wizard, the wizard was not including the email addresses for additional contacts recorded against an owner contact where either 'L' or 'M' were ticked. This issue has been resolved.

Victorian Levy Notices: For agencies in Victoria, the levy notice text was overlapping on the total due amounts columns when three or more levies were due in the same month. This issue has been resolved.

Statement of Key Financial Information: For agencies in NSW the Statement of Key Financial Information has been updated to include the following 'Approved form under: Strata Schemes Management Act 2016 (Section 94 (1)) as per the requirement of the Department of Fair Trading.

Quick Reports: When searching via Quick Reports > Lots, in some instances the incorrect correspondence delivery email address was displayed. This issue has been resolved.

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