Strata Master Version 12.5 including File Smart 8.0.2 Release

Training & Release Notes

File Smart Version 8.0.2 was released in conjunction with Strata Master Version 12.5 - Release notes are included in the Strata Master Release Notes below.

This document will cover the following:

Feature Summary

Online Invoice Approval

Strata Master Version 12.5 and File Smart Version 8 give you the ability to streamline the external invoice approval process in your office.

Restore order and increase your team’s productivity by removing the need to spend hours each month sending out invoices for approval and manually keeping track of responses.

You will be able to:

- Easily send invoices in bulk that require Committee Member Approval
- Specify different approval rules for each plan in your portfolio
- Select specific Committee Members as Approvers for each of your plans

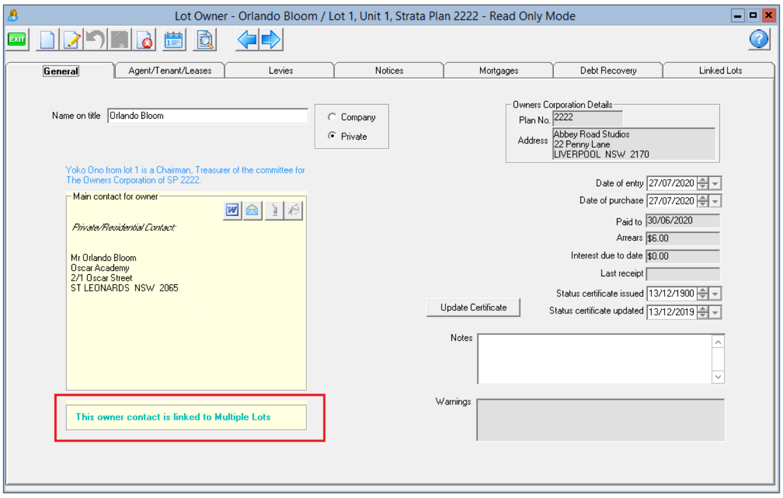
- Approvers will be able to action invoices directly from the Committee Member Portal
- Automatically include invoices that have gained a majority approval, to your normal payment process
- Maintain a history of all invoice approval data in Strata Master

For more detailed information check out the Online Invoice Approval Guide

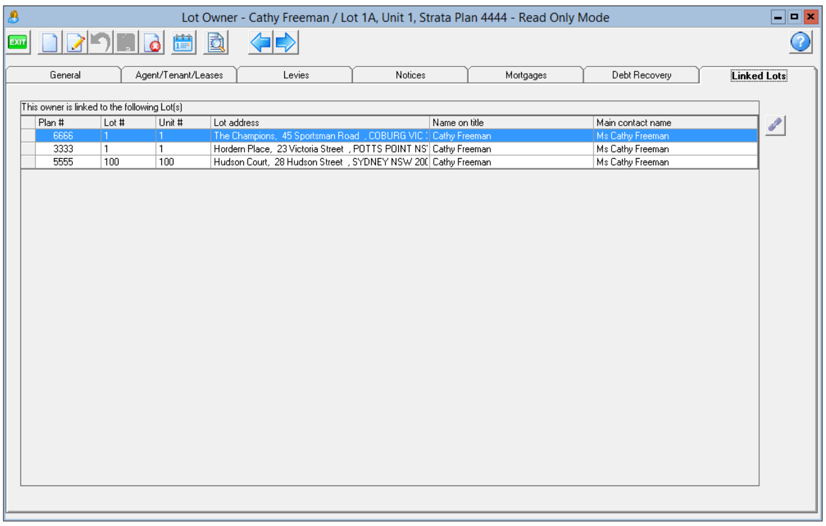
Improvements to Linked Contacts in Strata Master

Several improvements have been made to easily identify your portfolio's high value owners that are linked to more than one lot in Strata Master.

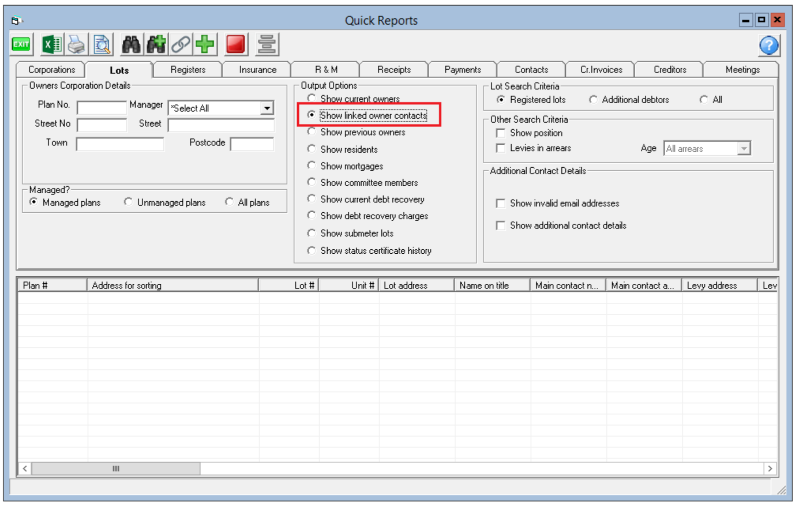
When an owner is linked to more than one lot, a new alert will be displayed on the Lot Owner Card.



An additional 'Linked Lots' tab has been added to the Lot Owner Card which displays the lots the owner is linked to, allowing you to easily navigate between them when required.



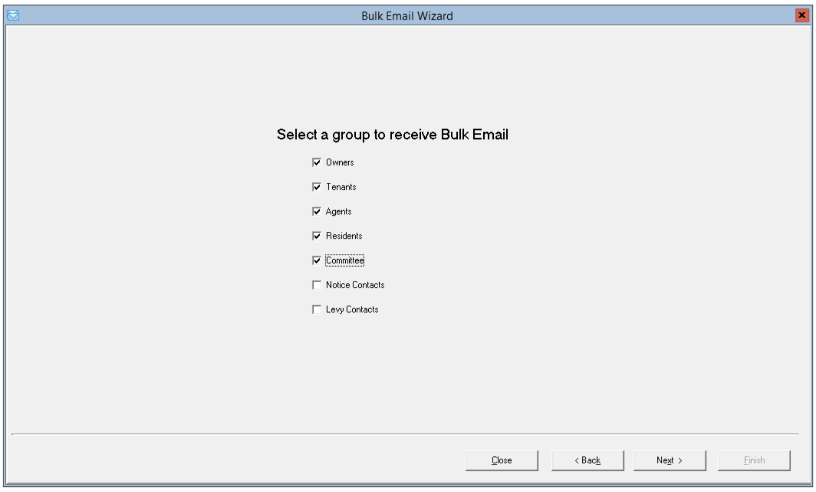
A new 'Show linked owner contacts' output option has been added to Quick Reports > Lots, allowing you to generate a report showing all linked contacts for the search criteria selected.



Improvements to the Bulk Communications Wizard

Bulk Communications in Strata Master just got even easier!

You can now select multiple groups at any one time when using the Bulk Communications Wizard for email or SMS.



Maintenance Improvements

When rejecting a Quote in the diary, an option is now available to automatically send an email to the contractor to advise that their quote has been unsuccessful.

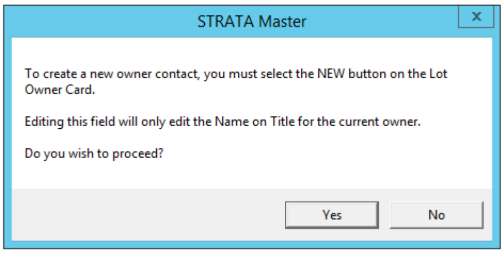
The ‘Notify contractor their quote was unsuccessful’ checkbox will be selected by default when changing the status of the Quote to *Rejected.*

The email will be sent to the contractor automatically when you click *Save*.

A new template called ‘Unsuccessful Quote Email Template’ has been added to your template folder. You may change the content of this template to suit your business needs.

Adding New Owners to Strata Master

To minimise the risk of new owners being entered into Strata Master incorrectly, the below prompt has been added when a user attempts to edit the Name on Title field.



Improvements to Pop-Up Selections

Improvements have been made to the pop-up selections screens on the Committee tab and the Registers screens.

You can now select using your keyboard by typing a string of characters, rather than just the first character.

A single and double-click have also been added to select an option and to close the screen.

Financial Year Prompt

When a plan's financial year has passed, but not yet rolled over, a prompt has been added when a user attempts to change the transaction date to the prior financial year.

Agency Configuration

Agencies must contact MRI Support if they wish to change their Trust Account in Strata Master. A prompt has been added to the Agency configuration screen to advise of this.

Levy & Debt Recovery Notices

When a Levy Contact is not the Owner, Levy and Debt Recovery notices will now display the 'care of abbreviation' to match the existing functionality of Notice Contacts.

Miscellaneous Invoice Screen

You may now navigate to other screens in Strata Master whilst the Miscellaneous Invoice screen is open.

Web Access Wizard

You are now able to manually add the merge field into the WebAccessNotification template

Corrected Issues

12 Month Statement of Revenue & Expenses	The 12 Month Statement of Revenue & Expenses report did not display a negative value in the expense account and incorrectly calculated. This issue has been resolved.
Bulk Communications Wizard	Additional contact types selected on the Levies and Notices tab were not being included for Notice Contacts and Levy Contacts when using the Bulk Communications Wizard. This issue has been resolved.
Quick Reports	When an Agent has a levy email address recorded against them, when searching in Quick Reports > Lots, the levy email address field was displaying the main email address, not the levy email address. This issue has been resolved.
Quick Reports	When searching for Agent Contacts in Quick Reports, the chain-link button did not load the contact card. This issue has been resolved.
Bulk Communications Wizard	When emailing Committee Members of multiple corporations via the Bulk Communications Wizard, the committee members email addresses were appearing in the To field, not the BCC field. This issue has been resolved.
Debt Recovery Notices	For agencies in Victoria, Debt Recovery notices calculated daily interest amounts that did not include opening balances. This issue has been resolved.
Opening Balances	The Opening Balance entry screen did not record group codes for prepaid balances. This issue has been resolved.
Debt Recovery Notices	In some instances, Debt Recovery and Reminder notices were issued by mistake when there was no outstanding money owed. This issue has been resolved.
Quick Reports	In some instances, an error occurred in Quick Reports when a linked lot's delivery method was changed from Email to Print by removing the email address. This issue has been resolved.
Outstanding Creditors Report	When an invoice created in a previous month was cancelled in the following month, the cancellation date on the Outstanding Creditors Report was calculated as the original invoice date, instead of the cancellation date. This issue has been resolved.

Outstanding Creditors Report	The outstanding Creditors Report was incorrectly displaying the invoice cancellations historically. This issue has been resolved.
Levy Positions Report	In some instances, the Levy Positions report was incorrectly reporting accrued interest. This issue has been resolved.
Owner Statement	A spelling mistake has been corrected on the Owner Statement
Contact Editor	When a Strata Master user had an access level of ‘Read’ for contacts, they could still edit contact details when navigating to the Contact Editor from Manage > Contact. This issue has been resolved.
Lot Detail Report	When an agent has a levy email address recorded against them when producing the Lot Detail Report the Levy Contact details displayed the primary email address. This issue has been resolved.

28/05/2021 10:39 am AEST