

# Strata Master Version 14 Release Notes

## Feature Summary

### MRI Strata Connect

#### Summary

Strata Master Version 14 delivers MRI Strata Connect, our fully cloud-based maintenance and community engagement module, with layers of automation for maximum time savings.

MRI Strata Connect has the following features:

- Work Order Management
- Virtual Maintenance Managers
- Quote and Invoice Approval
- Smart Invoice Extraction
- Supplier Compliance
- Interactive Building Profiles
- Consolidated Communications

For more detailed information please check out the MRI Strata Connect website [here](#)

### StrataVote Integration

#### Summary

Strata Master Version 14 delivers a two-way integration with StrataVote, providing unrivalled meeting, electronic voting, and documentation functionality to Strata Master users.

You will be able to:

- Seamlessly compose new meetings from customizable meeting templates
- Issue documents via email
- Host Meetings online
- Facilitate Online Voting in Real Time
- Save significant time throughout the meeting process

To book a demo with the StrataVote team, please click [here](#)

For more detailed information on the two-way integration, please check out the [StrataVote How to Guide](#)

# Macquarie Direct Debit

## Summary

Strata Master Version 14 delivers integration with Macquarie's Direct Debit, which allows your lot owners the opportunity to opt into Direct Debit themselves from their nominated bank accounts.

Macquarie Direct Debit enables you to offer an additional service to your portfolio, as well as providing the following benefits to your agency:

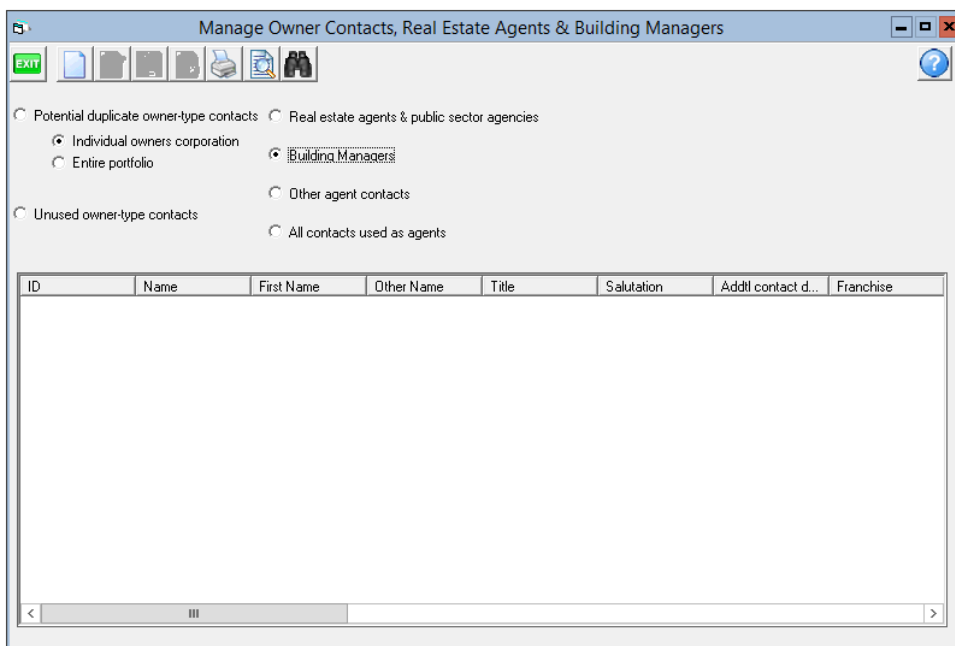
- Reduced arrears: payers are charged as required directly from Strata Master.
- Offers convenience and peace of mind: where owners may be overseas or just want the convenience of direct debit, levies, special levies, and invoices can be debited when they fall due directly from Strata Master.
- Digital and efficient: unlike typical paper-based direct debit authorities that need to be stored for 7 years, DEFT Biller initiated Direct Debit utilises a digital authority removing the need for paper forms and filing.
- Safe and secure: Strata Master does not store any bank account or credit card information. DEFT stores a digital wallet that owners can update when required.

For more detailed information check out the [Macquarie Direct Debit Guide](#)

## Building Managers in Strata Master

A new Building Manager contact type has been added to Strata Master. Building Managers can now be added in the same manner as Real Estate Agents by navigating to Manage > Contacts.

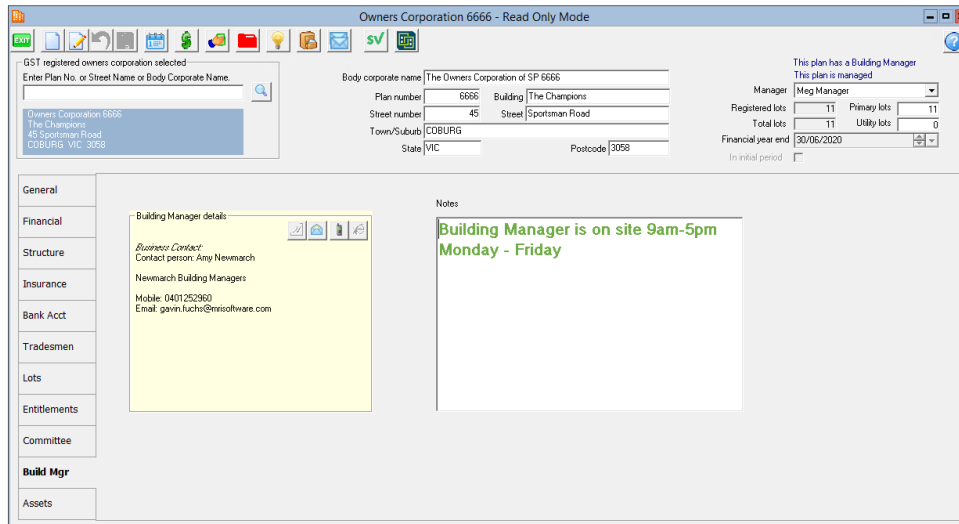
A new Building Managers option is now available on this screen.



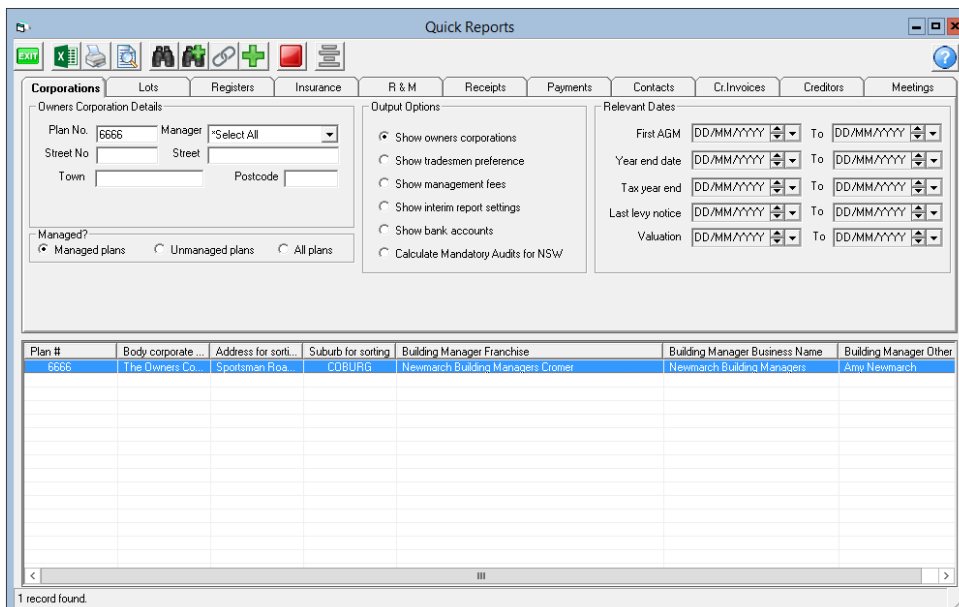
Once you have added a Building Manager you can assign them to a corporation by navigating to the new Building Manager tab and entering via edit mode.

Use the binoculars to select the correct Building Manager and click Save. Once saved, a message will display on the corporation screen to highlight to all users that a Building Manager is used by this building.

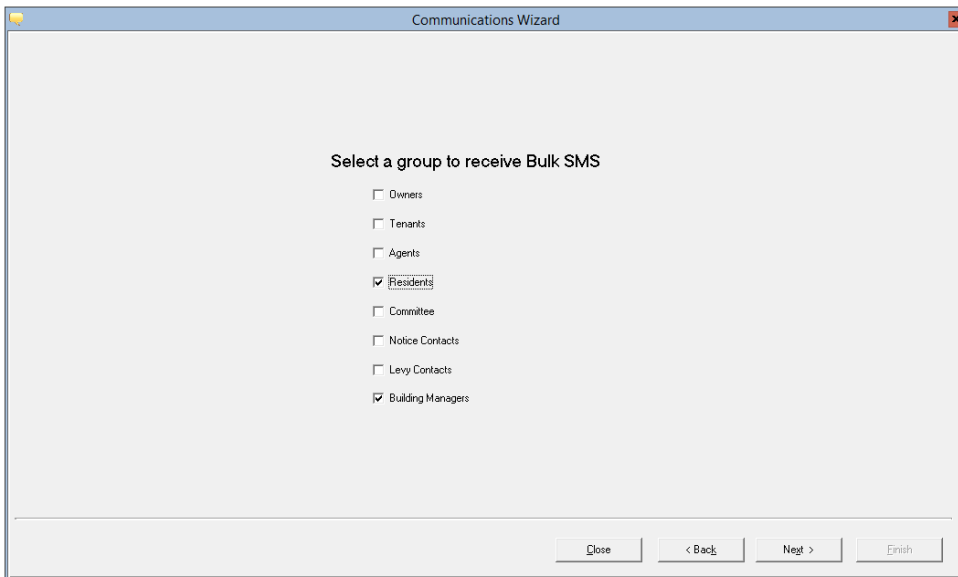
A note section is also available on the Building Manager tab should you wish to record any further information relating to the Building Manager for that specific corporation.



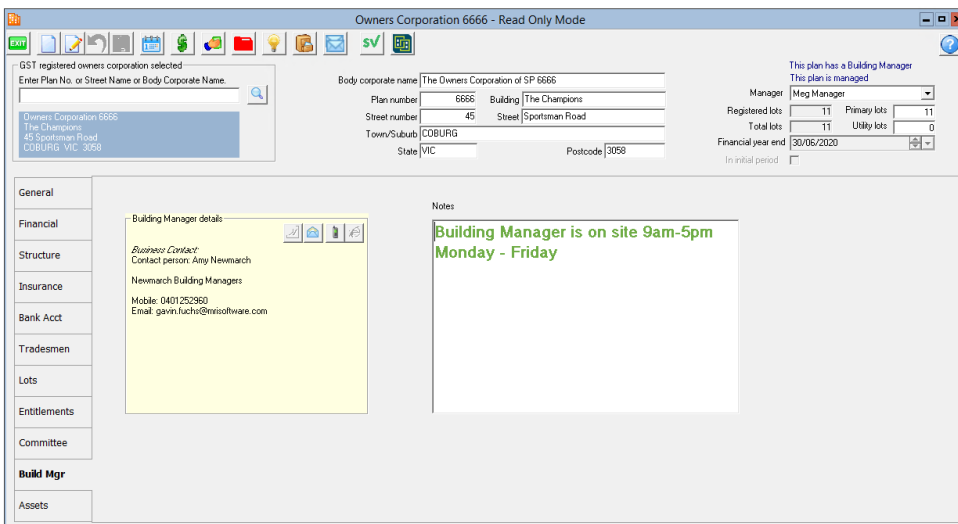
A new Building Manager column has been added to Quick Reports > Corporations. When 'Show owners corporations' is selected, the Building Manager column is available for selection, allowing you to produce a report on all Building Managers for your portfolio.



Building Managers have been added as a Contact group to the Bulk Communication Wizard, allowing you to easily include them in your bulk communication via both email and SMS.



You can also directly SMS Building Managers via the Building Manager tab by selecting the mobile phone icon.



Building Managers will be available for selection in both the 'reported by' and 'access contact' fields when sending Work Orders and Quote Requests. You can configure the Building Manager to be the default Repairs & Maintenance contact by navigating to Manage > Repairs & Maintenance.

The Building Manager's contact details have also been added to Mail Merge in both the Owners/Lots data source and the Owners Corporation data source.

Building Managers can be added to the committee tab if you wish for them to be included in your committee communications.

To add a Building Manager to the committee tab, enter edit mode followed by the green plus icon.

Select the Building Manager from the position column and their contact details will be pre-populated for you. Now, when you select the email icon on the committee tab, the Building Manager will be included in the cc field.

If you wish for the Building Manager to receive Interim Reports, you must select the Reports checkbox.

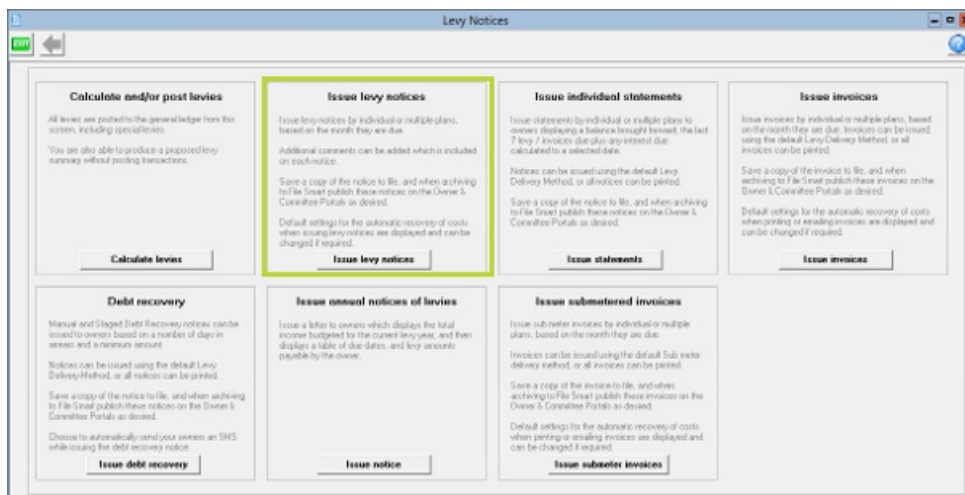
You can provide access to the Strata Portal for Building Manager's for the purpose of Online Invoice Approval. To provide access, navigate to the web access wizard and follow the same process as if they were an owner.

Once you have granted the Building Manager web access you will be able to select them as an Approver on the Committee tab.

## Levy Wizard Enhancements

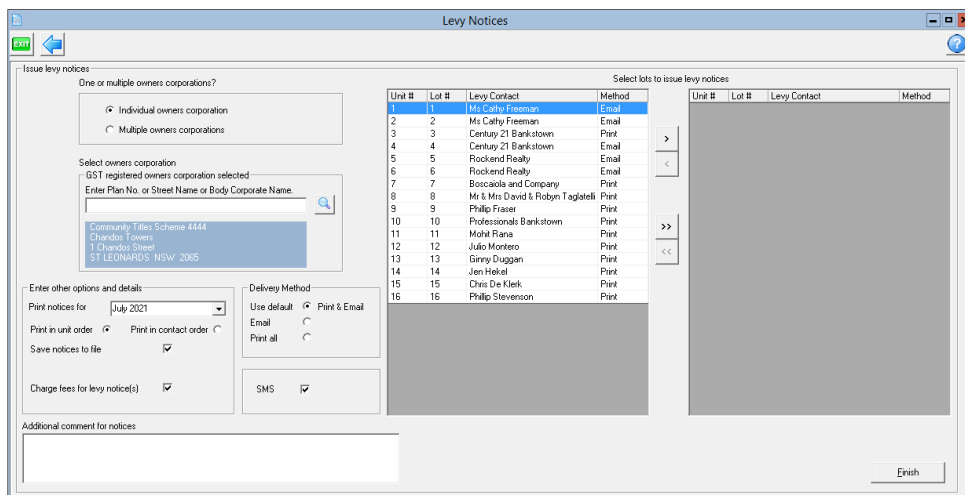
Several enhancements have been made to the way in which Levy Notices are generated in Strata Master.

When navigating to the Levy Wizard, a new 'Generate Levy Notices' option has replaced both the Email and Print Levy Notices option.



This option will allow you to generate Levy Notices via both print and email in the same levy run.

Both print and email will be selected by default, this ensures that your levy contacts receive the levy notice based on their levy delivery method preference.



Selecting 'Print all' will ignore the levy contact's delivery method preference and will print all levy notices.

When your Levy Contacts have a delivery method of Print, their additional contacts can now receive a copy of the levy notice via email.

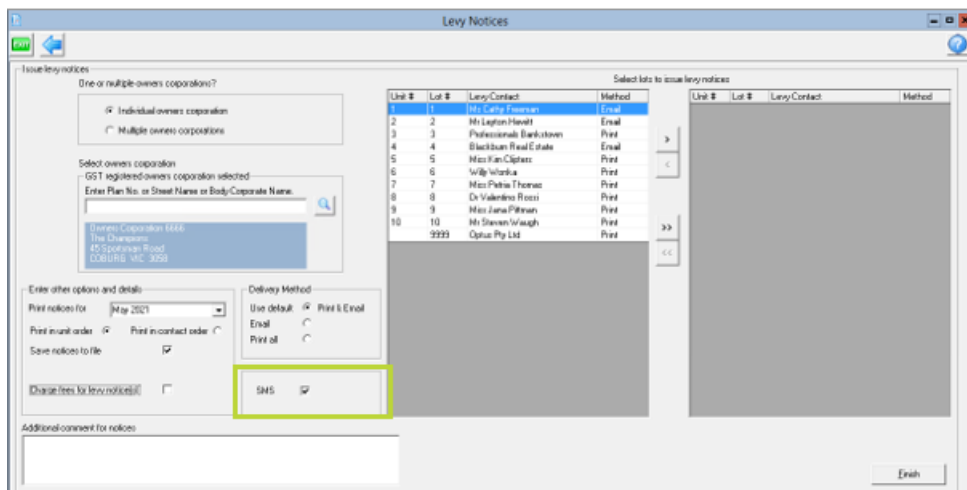
Additional contacts with a valid email address recorded against the contact with the 'L' ticked will automatically be sent a copy of the levy notice via email when the levy notice is generated.

You can also now choose to send a copy of the notice via email to additional contacts on the Levies Tab of a Contact Card, even when the Levy Notice has a delivery method of Print.

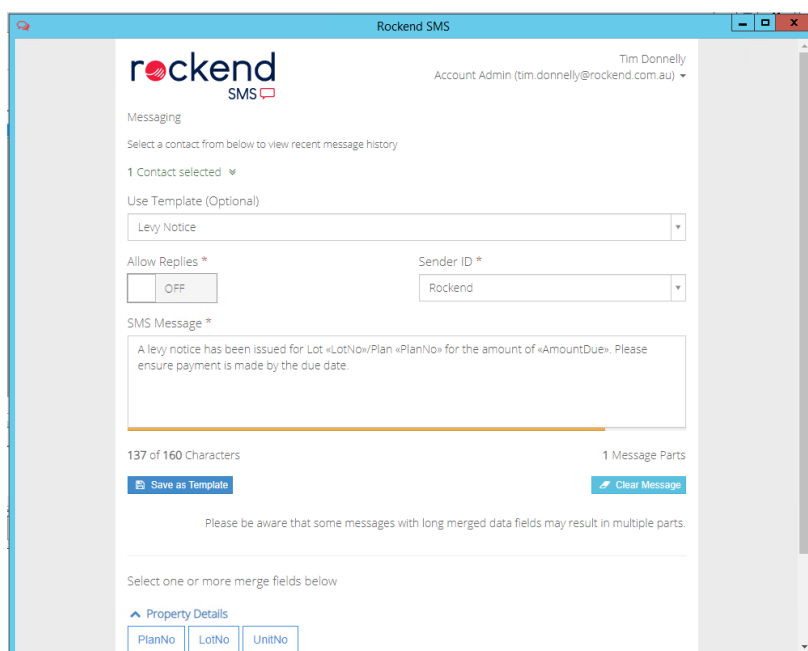
When selected, the additional contacts will automatically be sent a copy of the levy notice via email when the levy notice is generated.

## Levy Wizard - SMS

A new SMS option has been added to the Levy Wizard, allowing you to send an SMS message to the Levy Contact to notify them that a levy notice has been issued.



The new SMS will display as per the below example:



For agencies who are using the Enhanced SMS Feature, a predefined levy SMS template has been preloaded into the web platform for you.

Only SMS users with administrator permissions can edit this template. You can do this by selecting the SMS icon from the Strata Master toolbar. Once logged in, navigate to SMS > Templates using the left side menu. A list of current templates will be displayed. Select a template name to open, view or edit.

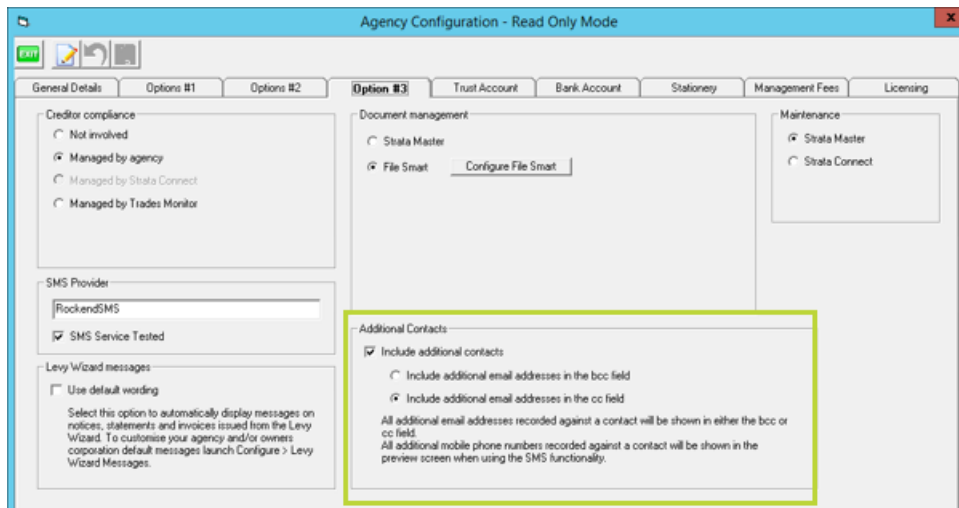
Merge fields will appear in toggle categories at the bottom of the screen – click any merge button to insert that merge field into your message.

For agencies who use the standard SMS feature, they can modify the new levy SMS template by navigating to the Template folder.

## Additional Contact Enhancements

An additional option has been added to the Agency Configuration for Additional Contacts.

When navigating to Configure > Agency > Option #3, the additional contacts configuration screen has been modified.



Upon upgrading, if you had previously selected to include additional contacts, this option will still be selected for you, and the 'Include additional contacts in the bcc field' will be ticked by default.

A new 'Include additional contacts in the cc field' has been introduced. When selected, emails sent from the following areas will now include the additional contact in the cc field to make it visible to the main contact that additional contacts have also received the correspondence:

- Contact Card
- Levy Wizard
- Owner Invoices screen

Additional contacts will still be included in the bcc field in all other areas of Strata Master e.g., Bulk Communications Wizard.

Additional contacts will still be included when using SMS.

## Levy Notice Enhancements

Improvements have been made to the way in which levy notices display when a payment is due.

When a levy notice is issued for a lot that has arrears and interest outstanding, the levy notice will now display when the levy payment is due and will also state that any arrears and interest is due immediately.

Due date	Details	Amounts due (including GST) (\$)		Total
		Admin Fund	Cap Wrks Fnd	
01/02/2020	Monthly Admin/Capital Works Levy	191.25	98.95	290.20
	Total levies due in month	191.25	98.95	290.20

Total of this levy notice	290.20	(including \$26.39 GST)
Levies in arrears	290.20	
Interest on levies in arrears*	29.57	* Interest calculated to 07/01/21
Outstanding owner invoices	0.00	
Subtotal of amount due	609.97	
Prepaid	0.00	
<b>Total amount due</b>	<b>\$609.97</b>	

**Arrears & Interest due immediately**  
**Levy Payment due 01/02/2020**

Late Payment: If payment is not made by the due date, interest may be charged at an annual rate of 10%.  
 Cheques should be made payable to 'Rockend Strata Management - General Trust'

When a lot has no interest or arrears due, the levy notice will only display when the levy payment is due.



## Levy Notice Email Template Enhancements

Upon upgrade, a new template called 'LevyNoticeEmailTemplate\_rename' has been added to your templates folder.

This new template includes both the amount due and the due date.

When a levy notice is issued via email, the amount and due date will now be included in the body of the email.

If you wish to start using the new template, please review the template, make any changes required for your office and delete '\_rename' from the template name, and delete your old templates to ensure the correct template is used.

## Online Invoice Approval Enhancements

Template Enhancements:

Upon upgrade, two new templates have been added to your templates folder:

- OnlineInvoiceApprovalEmailTemplate\_rename
- OnlineInvoiceApprovalReminderTemplate\_rename

Both new templates include the invoice amount and creditor name.

When an invoice approval email or reminder email is issued, the invoice amount and creditor name will now be included in the body of the email.

If you wish to start using the new templates, please review the template, make any changes required for your office and delete '\_rename' from both the template names, and delete your old templates to ensure the correct template is used.

### Other Enhancements:

An enhancement has been made to the File Smart Creditor Invoicing screen, providing a warning message to users when another user is concurrently sending out invoices for approval. This improvement will allow users increased visibility of the Invoice Approvals being sent to Committee Members.

When attempting to configure a new Approver via the Committee tab for a contact without an email address recorded, a prompt will now display advising you that an email address will need to be added.

When configuring a new Approver who has an invalid email address, the email address cell will become red upon saving, alerting you to the fact.

If you remove an email address for an existing Approver, the email address cell will also become red upon saving.

Non-lot Owner Committee Members can now be provided access to the Strata Portal via the web access wizard. This enhancement will allow non-lot Owner Committee members to be added as Approvers for Online Invoice Approval.

To add a non-lot Owner Committee Member as an Approver for Online Invoice Approval, complete the following steps:

1. Provide web access via the Web Access Wizard
2. Navigate to the Committee Tab
3. Select the edit button

4. Select the Approver checkbox
5. Save

The Non-lot owner Committee member will now receive the same emails as Committee Member Approvers for any new invoices sent out for Online Invoice Approval.

When you grant web access, they will be able to login to the Strata Portal using the 'Committee Member Non-lot Owner' option from the dropdown box on the login screen.

Note:

If they do not select this option, their credentials will not work.

They will not have access to the same information as Owners and Committee members. Their homepage will have limited information.

## Notes Enhancements

The Notes section on the Building Card, Lot Card & the Building Manager tab have been made larger and have been enhanced allowing you to copy and paste text with different fonts, sizes and colours.

**Owners Corporation 6666 - Read Only Mode**

GST registered owners corporation selected

Enter Plan No. or Street Name or Body Corporate Name:

Body corporate name: The Owners Corporation of SP 6666

Plan number: 6666 Building: The Champions

Street number: 45 Street: Sportman Road

Town/Suburb: COBURG State: VIC Postcode: 3068

This plan has a Building Manager  
This plan is managed by Meg Manager

Registered lots: 11 Primary lots: 11  
Total lots: 11 Utility lots: 0  
Financial year end: 30/06/2020

**General**

Plan Number: 6666  
Address: The Champions, 45 Sportman Road, COBURG, VIC

	Admin	Capital Works	Total
Cash at bank	88,342.24	23,755.62	92,097.86
O/S invoices	3,481.20	NIL	3,481.20
Net cash	64,861.04	23,755.62	88,616.66
Reserve funds:			NIL
Available cash	64,861.04	23,755.62	88,616.66
Total investments:			23,569.00
Receivable-Std	46,504.35	7,750.81	54,255.66
Receivable-Special	0.00	0.00	0.00

Last levy notice printed: 01/06/2021  
Last levy notice emailed: DD/MM/YYYY

Approved for web access of report(s): Budget & Levy Schedule  
 Online Voting Approved: DD/MM/YYYY

**Notes**

Last levy notices were printed on 01/03/2021.

Building Manager is on site 9am-5pm  
Monday - Friday

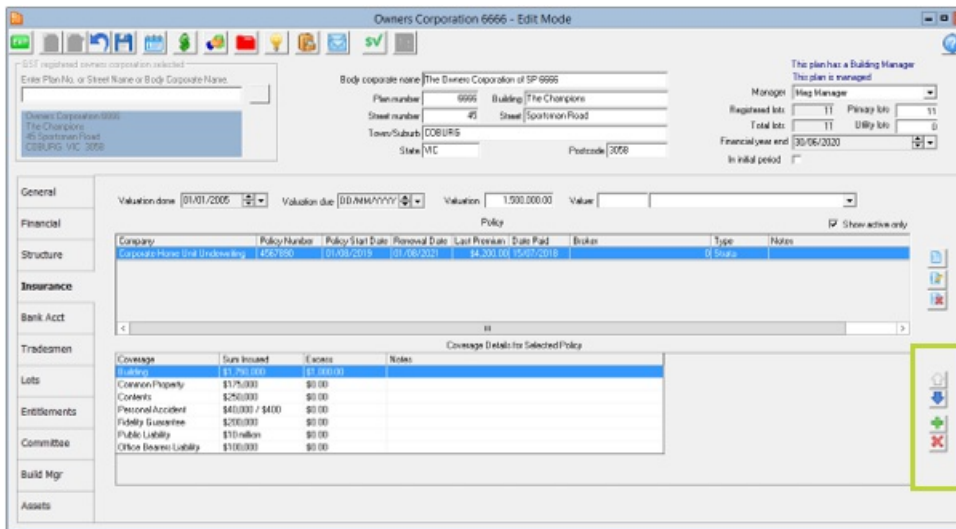
New garage doors recently installed  
- Additional garage keys are \$150

**Warnings**

Financial year end finished.  
Committee may not be correct.  
Asbestos Control Register

## Insurance Enhancements

A plus, delete, and up and down icons have been added to the insurance tab, making updating or entering insurance coverage details easier.



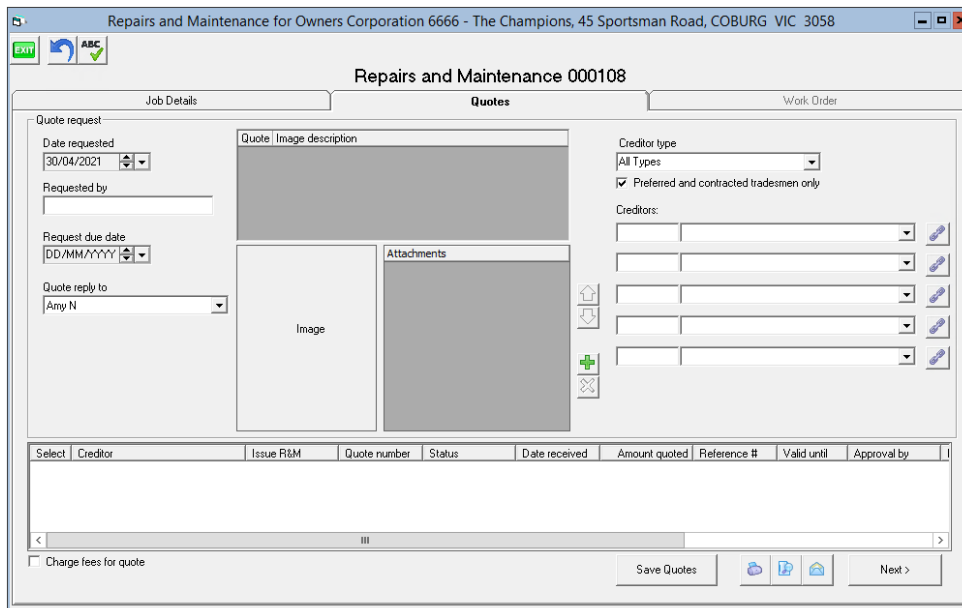
Select the green plus button to add a new coverage item.

Highlight a line and select the red cross to delete the selected coverage item.

Use the up and down arrows to move your selected coverage item.

## Quote Request Enhancements

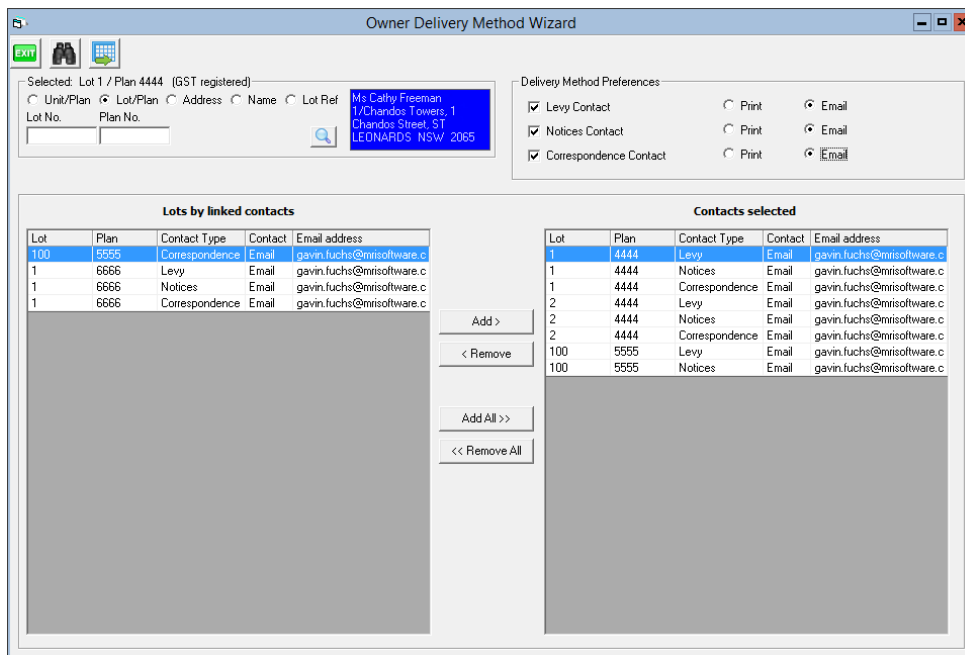
A new option has been added to allow users to add PDF attachments to Quote Requests.



Attachments added in this screen will automatically be added as separate attachments when sending Quote Requests via email.

## Contact Delivery Method Change Wizard

You now have the ability to bulk update the delivery method preferences for your contacts.



The new wizard allows users to select an owner, display their linked lots, and adjust their delivery method preferences for any of these lots to suit their requirements. Updates to these delivery preferences can be made for the:

- Levy Contact
- Notices Contact
- Correspondence Contact

Any changes made to delivery preferences using this wizard will be tracked on the Audit Trail Report.

A new User Access Right has been created to allow or restrict access to this wizard. This access right will be provided to managers by default.

## Work Order & Quote Email Template Enhancements

The work order and quote subjects have now been added to the subject line of the email templates making it easier for your creditors to see what the request is for. Two new templates have been added to your template folder:

- QuoteEmailTemplate\_rename
- WorkOrderEmailTemplate\_rename

You will need to review these templates, make any changes, remove the '\_rename' and delete your old templates to ensure the correct template is used.

## Interim Reporting Enhancements

When generating Interim Reporting, an option is now available to remove page numbers from both the reports and table of contents page.

## Strata Owner Portal - Meetings Enhancements

A new 'Show on portals' checkbox has been added to the Meeting Register.

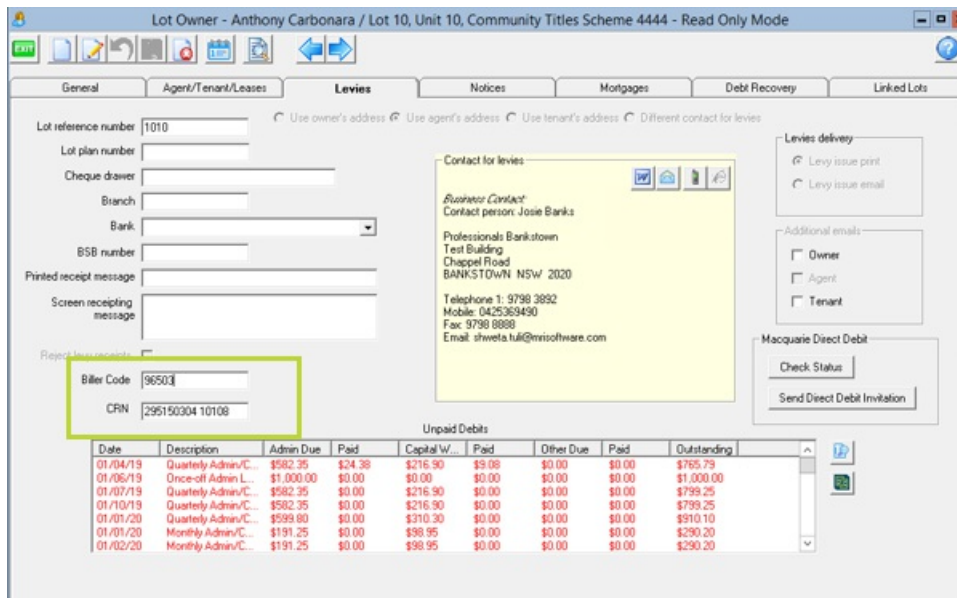
This checkbox will be selected by default.

When selected, the meeting details will be visible on the Meetings page of the Strata Owner Portal.

When you un-check this option, the meeting will no longer be visible on the portal.

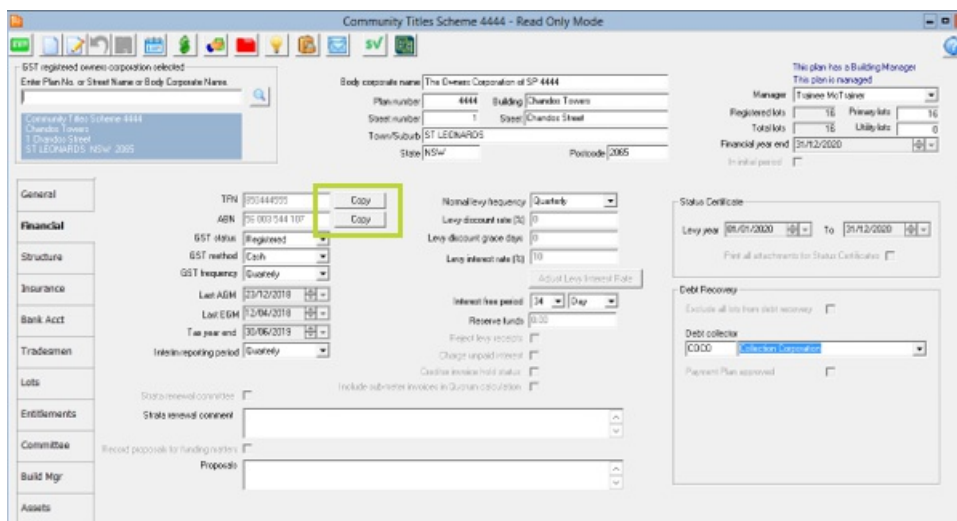
## CRN and Biller Code Enhancements

CRN and Biller Code fields are now available on the Levies tab, making it even easier to check and share these with your contacts.



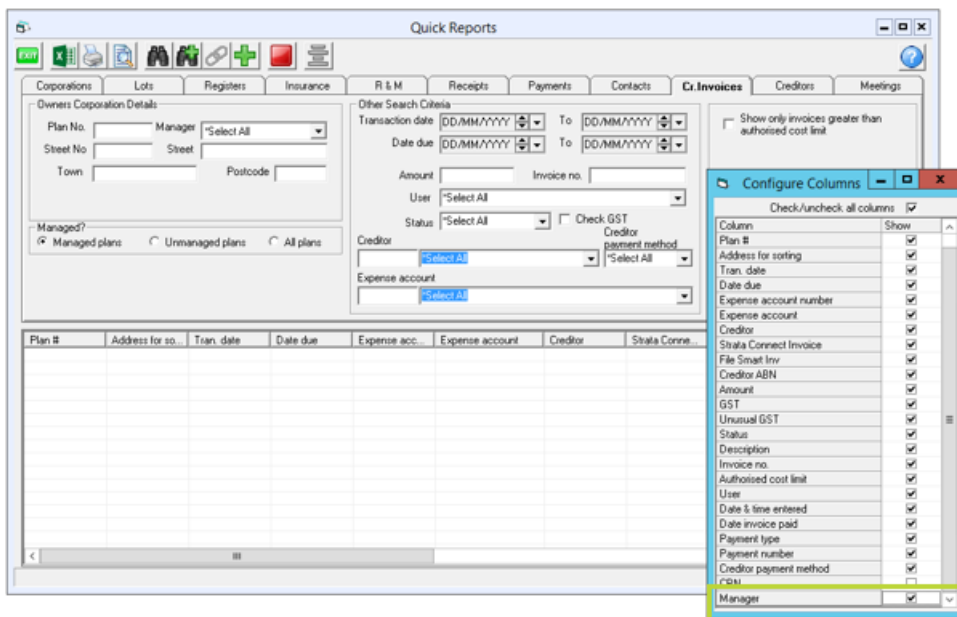
## Financial Details Enhancements

A 'Copy' button has been added to the TFN and ABN fields on the Financial Tab of the corporation screen, allowing users to copy the data to their clipboard without the need to enter edit mode. Users will also now be able to copy and paste the BSB and Account Number from the bank account tab without the need to enter edit mode.



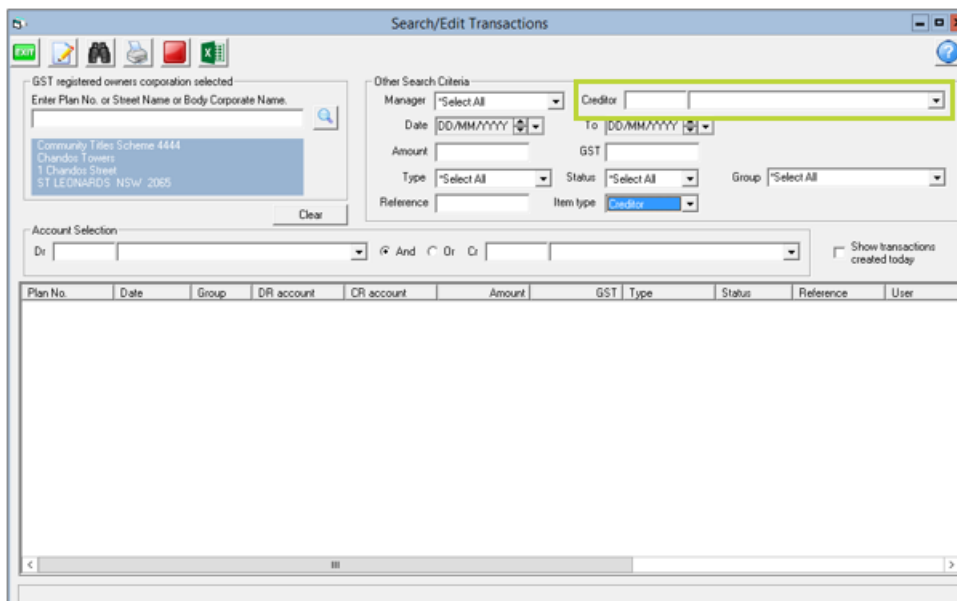
## Quick Reports Enhancements

When searching via Quick Reports > Creditor Invoices, the Manager field is now available in the Configure Columns screen.



## Search/Edit Transactions Enhancements

The ability to select a particular creditor has been added to the search/edit transactions screen when an item type of 'Creditor' has been selected, making it even easier to search for particular transactions.



## Debt Recovery

Debt Recovery notices will now be sent to any additional contacts (Owner, Tenant, Agent) that have been selected on the Levies tab of the Owner Card.

## Sub metered Invoicing

The Real Estate Agent levy email address has been extended to include submetered invoices. Now, when a real estate agent has a levy email address, submetered invoices will be sent to the real estate agent's levy email address.

## Strata Owner Portal - Maintenance

Work orders or quotes with a status of 'Removed', will no longer show on the strata owner portal

## Strata Owner Portal – Voting

Strata Managers will now receive an email notification when an owner submits their online vote via the strata portals.

## Owner Search

On the Owner Search screen, the cursor will now return to the first field on the screen once a search has been completed.

## Browser Configuration

Browsers launched from within Strata Master will now use your default browser configuration.

## DEFT Reference Number

The space in the DEFT Reference Number on payment slips has been removed to avoid errors when owners were copying and pasting their DEFT reference number.

## Generic BPAY Levy Notice

A new checkbox has been provided to the Generic BPAY Levy Notice Stationery Configuration. Users will now have the option to exclude bank account numbers from the CRN field showing on levy notices. This checkbox will be available for both Email and Printed Levy Notices using the Generic BPAY Levy Notice slip.

## Audit Trail Report - Insurance

Changes made to the insurance details on the Insurance tab will now be included in the corporation data item of the Audit Trail Report.

## Macquarie Bank

Macquarie Bank is no longer accepting cash payments for levies or invoices. The \$2.75 processing fee for payments made via Australia Post has also been removed. The Macquarie Levy Notice & Invoice templates have been updated to reflect these changes.

## Corrected Issues

Levy Notices      In some instances, the street name was not being included on levy notices or invoices when the Unit or Street number was left blank. This issue has been resolved.

Levy Contacts      When a new levy contact was assigned to a lot that did not have an email address recorded against it, the levy delivery method preference was being set to print for all other lots that use the same levy contact. This issue has been resolved.



Online Invoice Approval	A prompt has been added when deleting a Committee member from the Committee tab who was configured as an Approver that would result in the number of approvers required being greater than the number of approvers that were configured.
Levy Notices	The spacing between 'Lot' and 'for' has been increased on both levy and debt recovery notices to avoid confusion.
PDF Attachments	When emailing a work order, quote request or any other formatted report, the PDF file name was being populated as C:\user\User_name instead of the document name. This issue has been resolved.
Voting Register	The voting results summary on the Voting Register was incorrectly recording multiple votes when an Owner had resubmitted votes on a motion. This issue has been resolved.
Strata Roll	Email addresses were still displaying on the Strata Roll when the 'Do not show email address on the Strata Roll' option was ticked. This occurred when an email address was entered in the 'Notice Address' field on the Agent/Tenant/Leases tab. This issue has been resolved.
WA Legislation	References to the Strata Titles Act have been added to all levy Notices for corporations with a WA Association Type.
File Smart Creditor Invoicing	An error occurred when attempting to launch the Miscellaneous Owner Invoice screen from the File Smart Creditor Invoicing screen. This issue has been resolved.
Online Invoice Approval	In some instances, an error occurred when two users attempted to send out the same invoice for approval via the FSCI screen. This issue has been resolved.
Online Invoice Approval	In some instances, an error occurred when users attempted to send out invoices to approvers that had non-numeric values entered in phone number fields in Strata Master. This issue has been resolved.
Reporting	When producing the Diary - Review time & charging report, unmanaged plans were being included in the report. This issue has been resolved.
Meeting Wizard	Users with an access level of 'Read' for both the Agenda Wizard and Minute Wizard functions were still able to make changes in both wizards. This issue has been resolved.
Owner	The Owner Statement & Current Owners Account were incorrectly

Statement	calculating interest for agencies in QLD. This issue has been resolved.
Insurance	An error occurred on the Insurance tab when a user navigated out of the coverage cell without selecting a coverage type. This issue is now resolved.
Direct Debit	In some instances, an error occurred when sending Direct Debit invitations for a corporation name that included non-alphanumeric characters. This issue is now resolved.
Direct Debit	When requesting Direct Debit requests via the Direct Debit Processing screen, some users experienced performance issues. This issue is now resolved.
Direct Debit	In some instances, an error occurred when requesting a Direct Debit for a contact that included non-alphanumeric characters. This issue is now resolved.
SMTP	The SMTP password field has been increased to support longer API keys.
Default R&M	When a contact was removed from Strata Master that was assigned as the default repairs access contact for a corporation, they remained as the default repairs access contact after removal. This issue is now resolved.
Online Invoice Approval	In some instances, the approval data was not being displayed in the File Smart Creditor Invoicing screen, allowing invoices to be sent for approval more than once. This issue is now resolved.
Outstanding Creditors Report	In some instances, an error occurred when generating the Outstanding Creditors Report where there was more than one cancelled transaction. This issue is now resolved.
Outstanding Creditors Report	In some instances, an error occurred for large databases when generating the Outstanding Creditors Report. This issue is now resolved. (DUPLICATED ABOVE)
Direct Debit	In some instances, an error occurred when sending Direct Debit requests that included a lot with an expired credit card. This issue is now resolved.
Cheque Payments	When selecting the 'Do Not Print Cheque Payment Details' option on the Mailing Payment Slip, all references to cheque payments are now removed.

Linked Lots	<p>Lots that included an alpha character were not displaying the alpha character on the linked lots tab. This issue is now resolved.</p> <p>Duplicated Below</p>
Quick Reports	<p>When an agent was selected in the 'Additional emails' option on the Levies tab of a Lot, the primary email address was displayed in Quick reports &gt; Lots &gt; Show Current Owners, not the Agent's levy email address. This issue is now resolved.</p>
Agent Contacts	<p>When an agent was selected in the 'Additional emails' option on the Levies tab of a Lot, the levies were emailed to the Agent's primary email address, not the levy email address. This issue is now resolved.</p>
Section 107	<p>When the first levy due in a levy year was posted as a once-off levy, all other levies were displayed on the WA Section 107 as once-off levies regardless of instalment frequency. This issue is now resolved.</p> <p>Once off levies were displayed on the WA Section 107 with the incorrect levy period. This issue is now resolved.</p>
Strata Portal	<p>For some resolutions, the Approvals tab was not visible on the Strata Master Owner &amp; Committee Member Portal</p>
Mailing Page & Labels	<p>In some instances, the street name was not being included on mailing pages or labels when the Unit or Street number was left blank. This issue has been resolved.</p>
Internet Error	<p>The following error will now be displayed when Strata Master is opened, but not connected to the internet. 'Error accessing internet. Please check your internet connection and try again. Contact Support should this error continue.</p>

09/09/2021 10:30 am AEST