



## Changing Banks, Entity (ie ABN, Company Name) or Trading Name for Strata Master

### Do I need to contact MRI Software if my company is changing its Trading Name?

Yes. Please email the details to your Account Manager **Sales.Rockend@mrisoftware.com** to arrange for a new licence to be issued. MRI Software will need the new trading name in writing and may also require identification and further documents.

See below if you are also changing your company or trust account.

### Do I need to contact MRI Software if my company is changing the Trust Account to another Bank?

Yes. Please email the details to our Education Services Team **education.apac@mrisoftware.com** to arrange for a MRI Software Consultant to assist with the changeover. You must give MRI Software at least 4 weeks notice for this service.

### Do I need to contact MRI Software if my company is changing a Single Trust account to Individual Trust accounts?

Yes. Please email the details to our Education Services Team **education.apac@mrisoftware.com** to arrange for a MRI Software Consultant to assist with the changeover. You must give MRI Software at least 4 weeks notice for this service.

### Do I need to contact MRI Software if my company is changing?

Yes, the new company will need to have their own subscription agreement. Please email the details to your Account Manager **Sales.Rockend@mrisoftware.com** to arrange the required paperwork. You must give MRI Software at least 4 weeks notice for this service

### Can the MRI Software Support Team assist you with making any of the above changes?

No. You must liaise with your Account Manager or our Education Services Team for assistance in obtaining a new licence or booking your MRI Software Consultant.

### Do I need assistance from MRI Software to carry out the changes to my Trust Account details or can I make these changes myself?

Changes cannot be made in Strata Master without the assistance of a MRI Software Consultant and remote consulting has been arranged.

Your MRI Software Consultant will assist you with the following:

- Changing your Trust Account details in Strata Master
- Assist in updating your Company Details and corresponding defaults, including the ABA, BPAY, Direct

#### Debits & Bank Download locations

- Assist in closing down the previous Trust Account/s and reconciling the old account/s
- Assist in entering any new opening balances
- Assist in reconciling the initial bank reconciliation with your new Trust Account/s

If the change of trust account is in conjunction with a change in company the new company will have a new database.

### Can I change my Trust Account details at any time during the month?

It is recommended as follows:

#### **Change of Trust only**

Details can be changed at any time of the month. A booked Consultancy session with MRI Software is required.

#### **Entity Change (ABN, Legal Name and Change of Trust)**

It is recommended that any changes should be completed after you have finalised your End of Month. You should refrain from entering any further transactions in Strata Master between your End of Month and your booked Consultancy session with MRI Software.

#### **Change of Trading Name**

Details can be changed at any time of the month. No Consultancy is required.

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