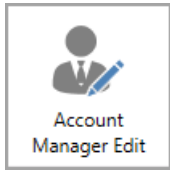


Account Manager Edit

Last Modified on 08/08/2024 9:00 am AEST

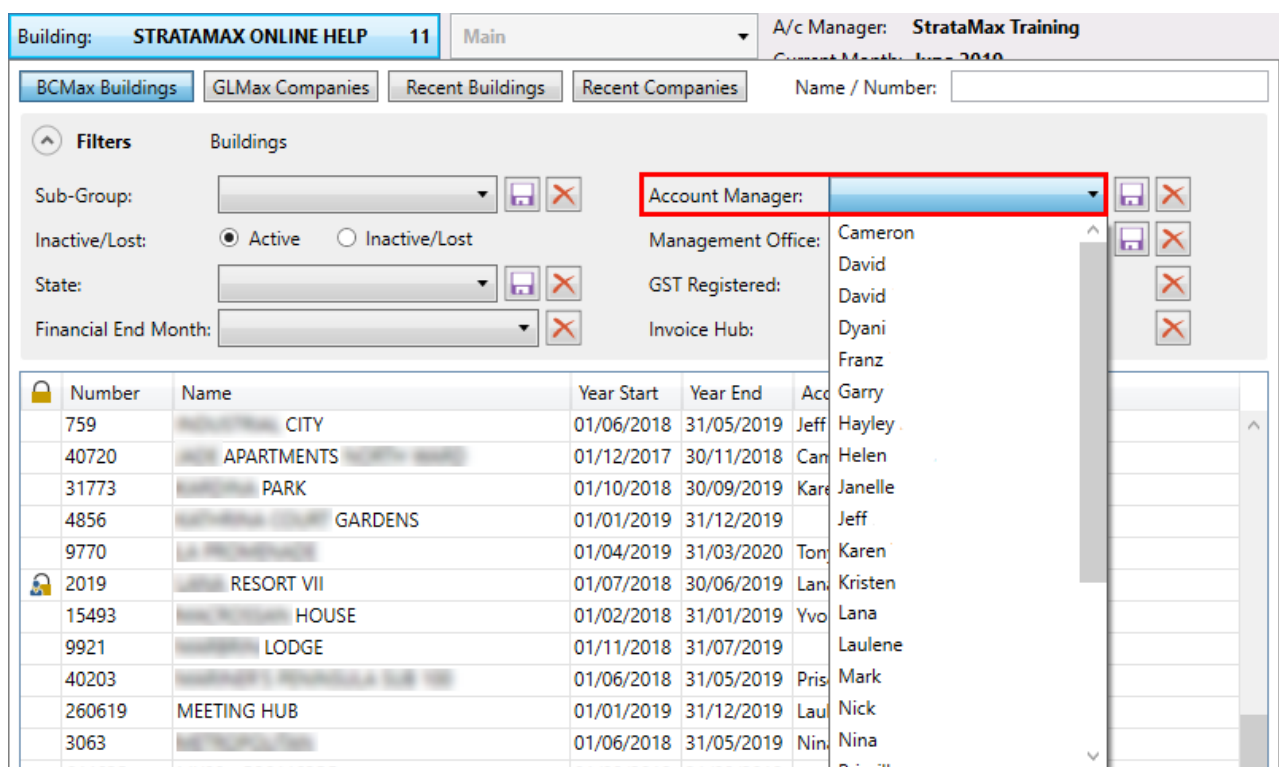


The instructions in this article relate to **Account Manager Edit**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

Account Manager Edit is where account managers in StrataMax are created, edited, and deleted. Once set up, the account manager will become either an option for selection in several screens throughout StrataMax, or visible in various reports.

The **Building Information** screen also has a field to select the account manager for that building, which is populated from the **Account Manager Edit** screen. The manager will then be included in various reports and use account managers as filters so you can easily produce a report for a particular manager's buildings, or to sort information in group reports into batches of the account manager.

For instance, within the **Building Selector Tool**, in the **Filters** there is an **Account Manager** drop-down, which will display only buildings belonging to the account manager selected. This is intended to make it quicker and easier for a strata manager to work within their own portfolio.



The screenshot shows the StrataMax software interface. At the top, the 'Building' is set to 'STRATAMAX ONLINE HELP 11' and the 'A/c Manager' is 'StrataMax Training'. Below this, there are tabs for 'BCMax Buildings', 'GLMax Companies', 'Recent Buildings', and 'Recent Companies'. The 'Filters' section is expanded, showing various filters for 'Buildings'. The 'Account Manager' dropdown is highlighted with a red box, and a list of names is visible: Cameron, David, David, Dyani, Franz, Garry, Hayley, Helen, Janelle, Jeff, Karen, Kristen, Lana, Lana, Laulene, Mark, Nick, and Nina. Below the filters, there is a table of buildings with columns for Number, Name, Year Start, Year End, and Account Manager.

Number	Name	Year Start	Year End	Acc
759	CITY	01/06/2018	31/05/2019	Jeff
40720	APARTMENTS	01/12/2017	30/11/2018	Can
31773	PARK	01/10/2018	30/09/2019	Kar
4856	GARDENS	01/01/2019	31/12/2019	
9770		01/04/2019	31/03/2020	Tom
2019	RESORT VII	01/07/2018	30/06/2019	Lan
15493	HOUSE	01/02/2018	31/01/2019	Yvo
9921	LODGE	01/11/2018	31/07/2019	
40203		01/06/2018	31/05/2019	Pris
260619	MEETING HUB	01/01/2019	31/12/2019	Lau
3063		01/06/2018	31/05/2019	Nin

Creating an Account Manger

The following instructions will create an account manager record to be selected in the 'Account Manager' field in **Building Information**.

1. Search or select **Account Manager Edit**.
2. Click the *Add* button.
3. Enter the details in the required fields.
4. Enter the *Name* as you wish it to appear in reports and on the Account Manager name list in **Building Information**.
5. The *Email* entered will be printed in some reports where the email address of the account manager is needed.
6. Enter the *Phone* number if required.
7. The *Signature* is populated by creating a new signature by clicking on the pencil icon. However, this is only needed if this account manager has bank approval to print their signature on cheques for their buildings. Go to the **Add Signature** section below to learn more.
8. Enter *Work Group* if applicable.
9. Click *OK*.

Editing an Account Manager

1. Search or select **Account Manager Edit**.
2. Select the account manager name to edit.
3. Update the information as required, then click the *Save* button.

Deleting an Account Manager

Deleting an Account Manager will remove the manager from the list that is used in **Building Information**. It will not remove them from any buildings that is currently set to them.

1. Search or select **Account Manager Edit**.
2. Highlight the Account Manager name to delete, then click the red cross.
3. When asked: 'Delete account manager?' click on Yes.

Adding a Manager to selected buildings

Once an account manager has been created, you can assign him/her to multiple buildings at once. This is done through **Building Information**.

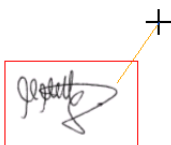
1. Search or select **Building Information**.
2. Search for Account Manager field.
3. In the list that appears, select the required account manager from the drop-down list.
4. Using the *Copy to Buildings* button uses the building selection list to assist with tagging a specific group of buildings or use the filters.



Add a Signature

A signature file needs to be scanned and saved in the StrataMax directory. This file is then converted so it can be used in StrataMax. The saved location is **<network drive>:\BCM\signatur**. If this folder doesn't exist, then you will need to create the **signatur** folder in the BCM directory.

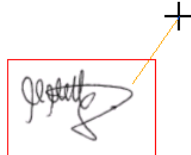
1. Create and scan the signature in a high-resolution format. If the signature is a PDF, select the signature and copy it to a word document.
2. Save the signature with a .docx extension to a folder named signatur. Example: <network drive>:\BCM\signatur\name.docx
3. Search or select **Account Manager Edit**.
4. Click *Add* to create a new account manager or select an existing account manager.
5. Highlight the account manager name, then select the pencil icon next to the Signature field to add or edit.
6. Select *New* and navigate to the <network drive>:\BCM\signatur folder.
7. Select the signature file, then click *Open*.
8. Once converted, highlight the document and click *Select*.
9. Then click to *Move Current Signature* to position it where you need it to be.
10. Click on the signature until a red box appears around it, then click and drag to position the signature.
11. Close and Yes to save changes to save its position.



Delete, Move or View a Signature

A signature file once converted can be moved, deleted or viewed.

1. Search or select **Account Manager Edit**.
2. Select the account manager name and then select the pencil icon next to the Signature field.
 - Click on the signature template name and click *Edit* to open the Report Template Editor. Once open, locate signature and click on it so that a red box appears around it and move it as required, then *Close* and *Yes* when prompted to Save.

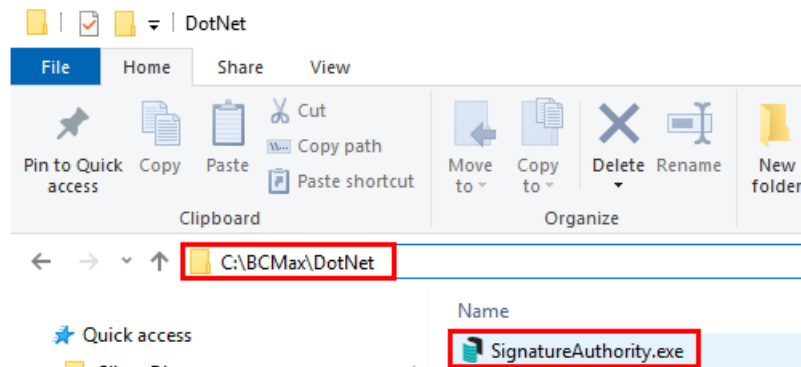


- To delete; select the red cross next to the Signature field to delete the signature file.
- To view; click on the magnifying glass next to the Signature field to view the signature file.

Authorising Electronic Signature on Cheques

There is a separate program called *SignatureAuthourity.exe*, which is used to authorise signatures to be printed on cheques. This program is located in:

C:\BCMax\DotNet

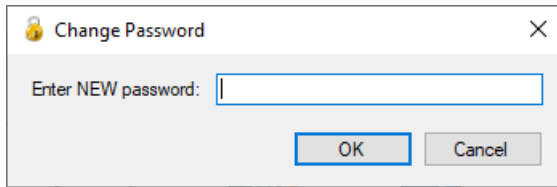


Do not open the *SignatureAuthourity.exe* program whilst you are performing this setup. (You may need to restart StrataMax for it to take affect).

The first item to check is that the user will need to have a password set up for their StrataMax username in order to proceed.

1. In the StrataMax desktop search for **Change Password**.

2. Enter the new password and click *OK*.



A dialog box titled "Change Password" with a close button (X) in the top right corner. It contains a text input field labeled "Enter NEW password:" and two buttons at the bottom: "OK" and "Cancel".

3. Repeat the new password and click *OK*.

Now you will need to ensure that a signature has been set up in **Account Manager Edit** as per [the instructions above](#).

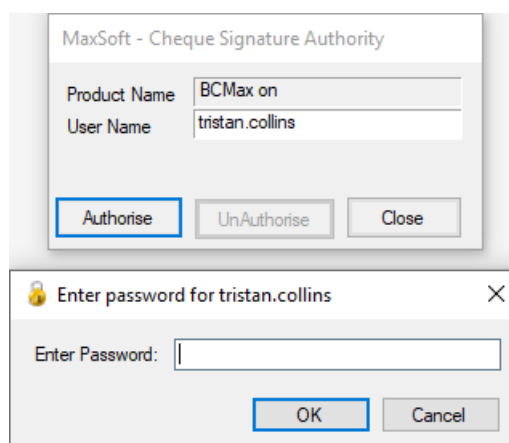
Once the signature has been set up, you will need to configure the **Payments** menu to print the signature on your cheques.

1. Search or select **Payments**.
2. Click the *File > Configure*.
3. Tick the box 'Print signature on cheques' tick box, and close the *Configuration* window.

- It is recommended to do a few test cheques prior to the payment run. Print onto plain paper and hold up against the cheque paper to see if the signature is close to the signature lines.
- Only one user in each StrataMax drive can authorise cheques at any one time due to security settings.
- You can also create a shortcut to *SignatureAuthority.exe* on your Windows desktop since you will need to open the program each time you need to authorise the signatures on cheques.

You are now ready to process cheques.

1. In the *Cheque Signature Authority* window, click the *Authorise* button.



Two overlapping dialog boxes. The top one is titled "MaxSoft - Cheque Signature Authority" and contains two text input fields: "Product Name" with the value "BCMax on" and "User Name" with the value "tristan.collins". Below these are three buttons: "Authorise", "UnAuthorise", and "Close". The bottom dialog box is titled "Enter password for tristan.collins" and contains a text input field labeled "Enter Password:" and two buttons: "OK" and "Cancel".

2. Enter your password into the prompt and click *OK*.
 - This window must remain open until the cheques has finished printing.
3. When the cheques have finished printing, click the *UnAuthorise* button, then *Close* to prevent any unauthorised cheques from being printed.

