Communication

Last Modified on 27/09/2024 11:47 am AEST

The instructions in this article relate to ***Communication***. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Many areas in the program can send e-mails and SMS. Any reports that come to the screen can be e-mailed from StrataMax. There is also a facility to use the e-mail address already stored in some of the areas in StrataMax to send these reports. These areas include Owners, Creditors, Committees, Agents, Others (Applicants) and Account Managers. Instructions are included below to explain how to use the various email functions included in StrataMax. ***Search Roll***, ***Search Office Bearers***, ***Search Creditors*** can assist with producing global lists of email addresses.

The StrataMax Support Team enables and configures emailing in StrataMax, which is called *Email Server***.** Once the email server has been installed, each user must have an email address set up via ***Security Setup***.

Check out the *Email Deliver-ability* article to learn more about how e-mails work in StrataMax.

Compose E-mail

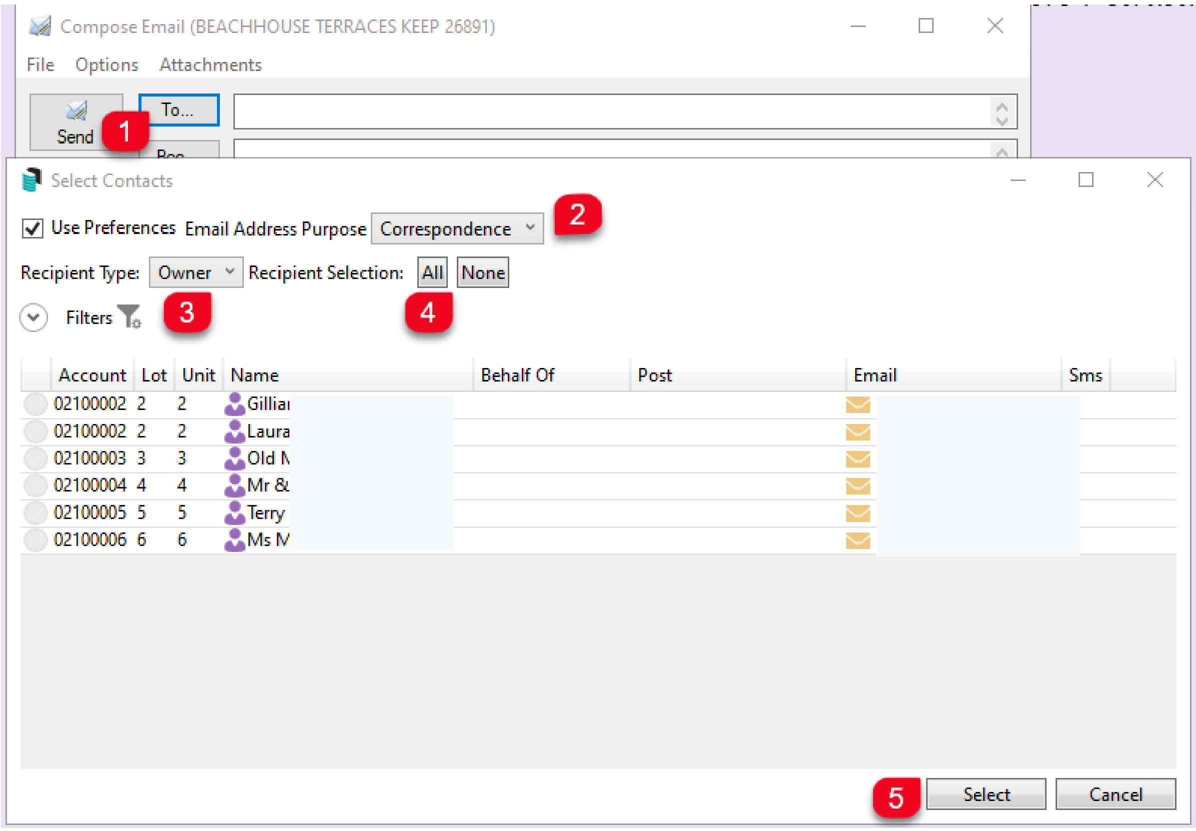
StrataMax has various ways to pick up the recipient's details if entered into other areas of StrataMax. If you do not record this information, you can manually type or copy & paste the email address into the *To...* or *Bcc...* fields. This area is designed to include the contact information for each individual.

> To send an e-mail to a large number of recipients, such as all creditors or owners, you will need to obtain a list of their email addresses. You can get these lists of owners, creditors and office bearers for multiple or all buildings for use in mass communication by using the corresponding Search. ***Search Roll***, ***Search Office Bearers***, ***Search Creditors***.

1. Clicking the *To...* and *Bcc...* buttons will display a contacts list to choose recipients from.
2. Make a selection for *Use Preferences Email Address Purpose* with the tick box and the address priority.
3. The *Recipient Type* drop-down list consists of contacts from the following areas:
   - Owners - ***Roll***/Lot Accounts.
   - Other Debtor - **Second Debtor** / ***Debtor Maintenance*** (available from Sub-Group)
   - Letting Agents - *Letting Agents* added to a lot within the ***Roll***.
   - Tenant - *Tenant* contacts added to a lot within the ***Roll***.

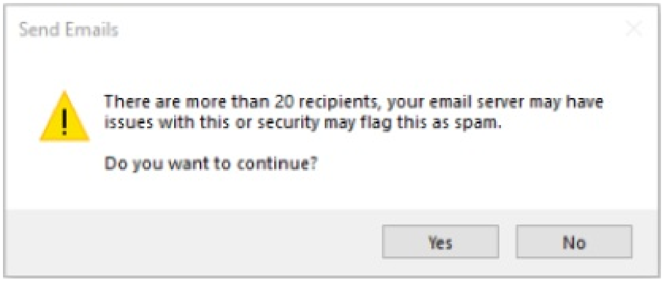
- Creditors - ***Creditor Maintenance***.
- Office Bearers - These are the members assigned in ***Office Bearers***.
- Applicant - ***Applicant Maintenance*** records used for various areas.
- Resident - Any contact flagged as *Owner Occupied* in the ***Roll***.
- Internal Users - Any internal user configured in ***Security Setup*** with a valid email address will be available in this area.

4. Click *All* to tag all Recipients, or select *None* to remove Tags so that you can select and tag the Recipients as required.
5. Review the tagged records and click *Select*. (Use Ctrl + X to untag all; for more keyboard shortcuts, click here)



6. Expanding the *Filters* option will include the *Report Distribution* filters and allow for these to be included as needed.
7. An e-mail subject can be typed in the 'Subject' field
8. For attachments, see the next section below.
9. In the body of the e-mail, text formatting can be changed using the toolbar above the e-mail body.

10. Click the *Send* button to send the e-mail.
    - A warning may appear to notify you if the e-mail is being sent to more than 20 recipients, just as a precaution in case it gets caught by spam filters, and you can choose to continue or not.

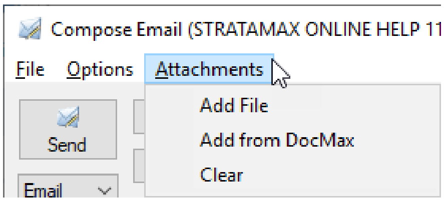


Attachments Menu

You can attach multiple files to StrataMax e-mail, but only one attachment can be added.

Each e-mail sent from StrataMax has a total file size limit of 10 MB.

Within the *Compose Email* window, click the *Attachments* menu and then one of the sub-menus.



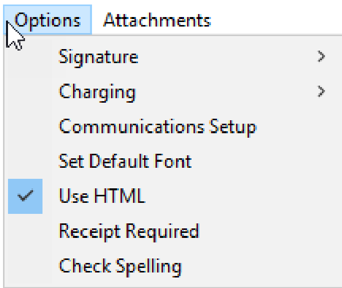
Add File
It will display the usual Windows *Open File* prompt where you can navigate to the file.

Add from DocMax
It will display the Select Document window in DocMax, and will already display a list of current documents belonging to the building. You can also use the Advanced Search function as well.

Clear
It will remove <u>all</u> of the attachments in the e-mail.

Options Menu

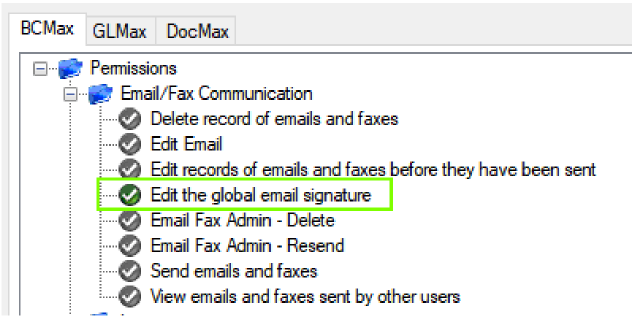
This section covers the various functions and items under the *Options* menu.



Signature

StrataMax e-mails support signatures, which can be specific to the user or global for all users. Signatures are created and saved in the bottom section of the ***Compose Email*** screen, the default screen appearing when you open the ***Communication*** menu.

The global e-mail signature is restricted in the ***Security Setup*** menu. The permission is 'Edit the global email signature'.



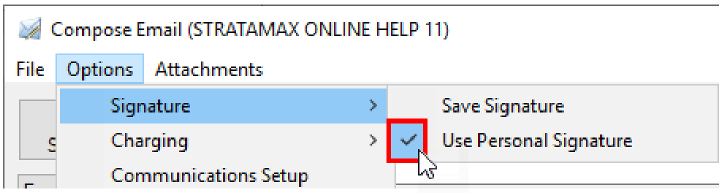
Personal vs Global Signature

The below instructions apply to both a Global Signature and a Personal Signature.

When running any global processes, for example, ***Levy Generation***, ***Levy Arrears***, or ***distribution of Meeting Agenda Packs***, the global signature may be required. If this is the case, then follow step **2** below. A personal signature can be set up and used for any singular emails sent.

To change either to a Personal or Global signature:

1. Click *Options* > *Signature* and tick *Use Personal Signature* option.
    - When ticked, the personal signature will be used on any e-mails sent from this user, and any changes made to the signature on the screen will only apply to the personal signature.
2. Click *Options* > *Signature* and remove the tick from the *Use Personal Signature* option. When **not** ticked, the global signature will be used, and any changes made will be saved to the global signature only.



There are several ways to insert a signature, including images, text, web links, HTML, lines and tables. It also supports multiple font types for your text, which can be copied and pasted from other programs.

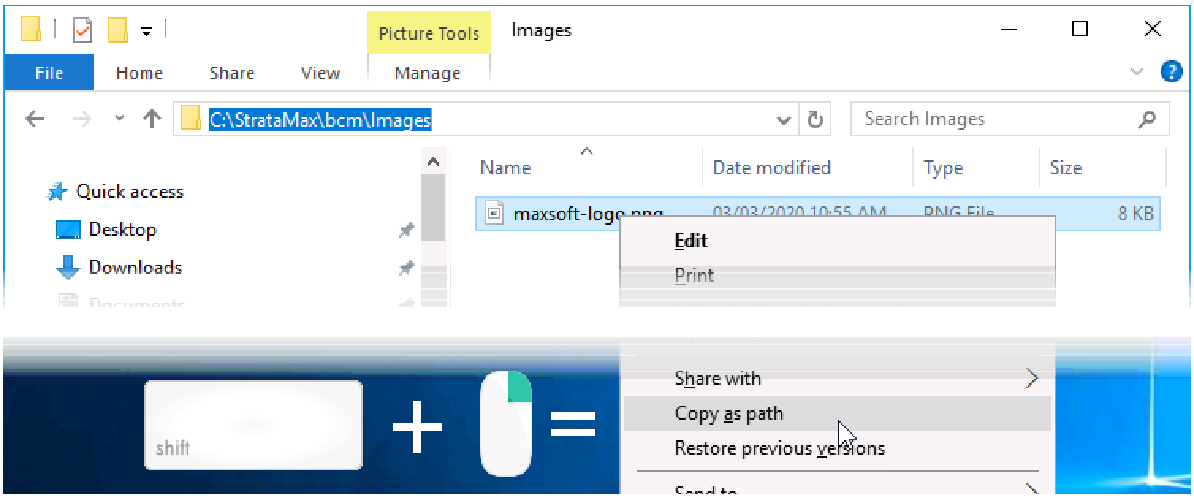
Inserting Images

The accepted file format for images are .jpg and .png. Files. Any images that need to be inserted into a StrataMax e-mail signature should be stored in a network folder on a server.

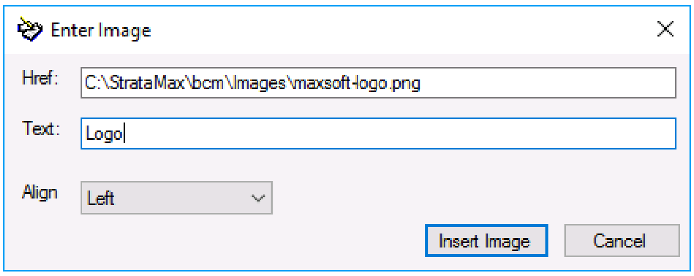
Moving, removing or renaming the file in Windows will remove it from StrataMax.

1. In the signature section, on the Compose Email screen, right-click your mouse and select *Insert* > *Image*.
2. In the *Href*: field, insert the image's file path, including the image name.

An easy way to do this is to use a handy Windows feature called *Copy as path*. To use it, hold the keyboard *Shift* key and right-click the file. This will copy the entire file path so you can simply paste it into the *Href*: field. **However**, the double quotation marks need to be removed.



For example, for the above image, the text in the *Href* field should be the following:



3. In the *Text:* field, placeholder text can be typed, which can be whatever is needed - it doesn't need to be the image file name.
4. Align the Image by clicking the drop-down arrow and selecting the preference.
5. Click the *Insert Image* button, and the image should appear in the signature section.
6. Click *Options > Signature > Save Signature.*

Inserting Text, Lines, Web Links

Text

1. Right-click in the signature section and select *Insert > Text.*
2. In the *Enter Text* field, type in the required text and click *OK.*

Line

1. Right-click in the signature section and select *Insert > Line.*
2. Click and drag the line to the required location.

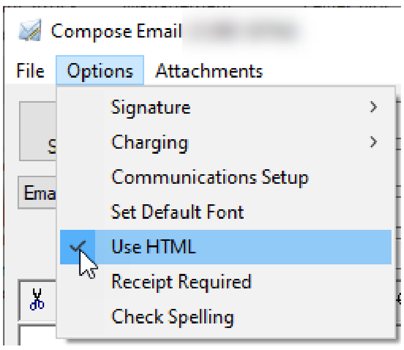
Web Link

1. Type the text you want to link, then highlight it with your mouse.
2. Right-click the text and select *Insert > Web Link*.
3. Type the full web address in the Href: field, including the http:// at the beginning.
4. Click the *Insert Href* button, and the text should change to blue and be underlined.

Inserting HTML

Inserting HTML (HyperText Markup Language) is for being able to consistently enclose tags within angle brackets and write scripts to enable the display of a signature. We recommend having at least some understanding of HTML coding when using this; however, it's not essential.

1. In the ***Communication*** window, select *Options* and make sure 'Use HTML' is ticked.



2. Right-click in the signature section in the bottom section of the ***Communication*** window, and select *Insert >Html*.

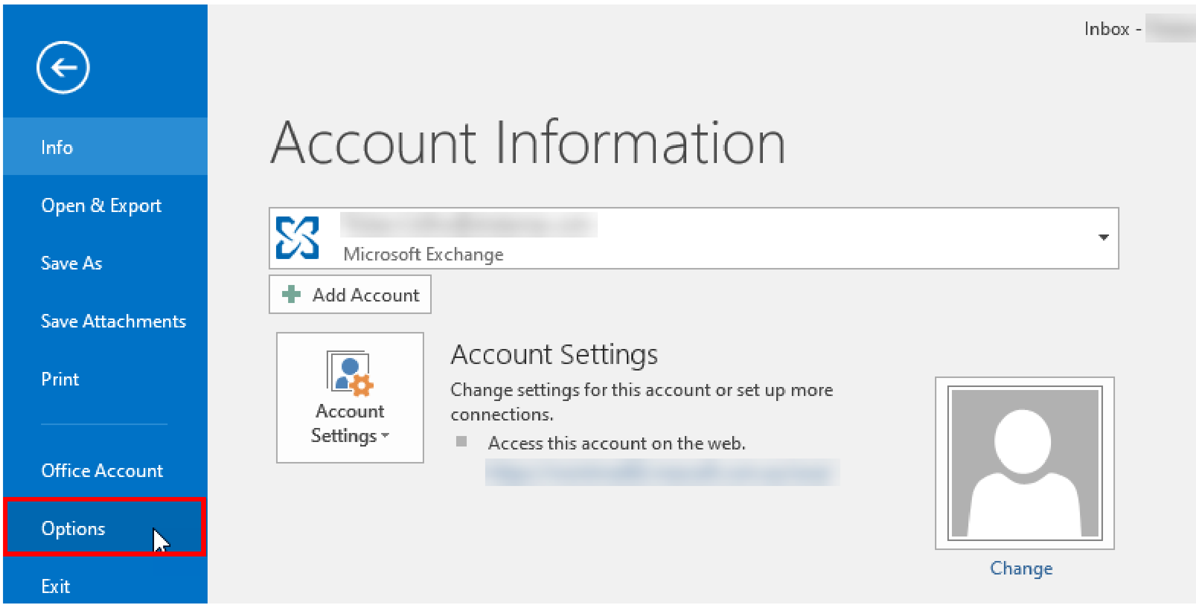
3. Paste the required HTML and click *OK*.

Outlook Signature HTML

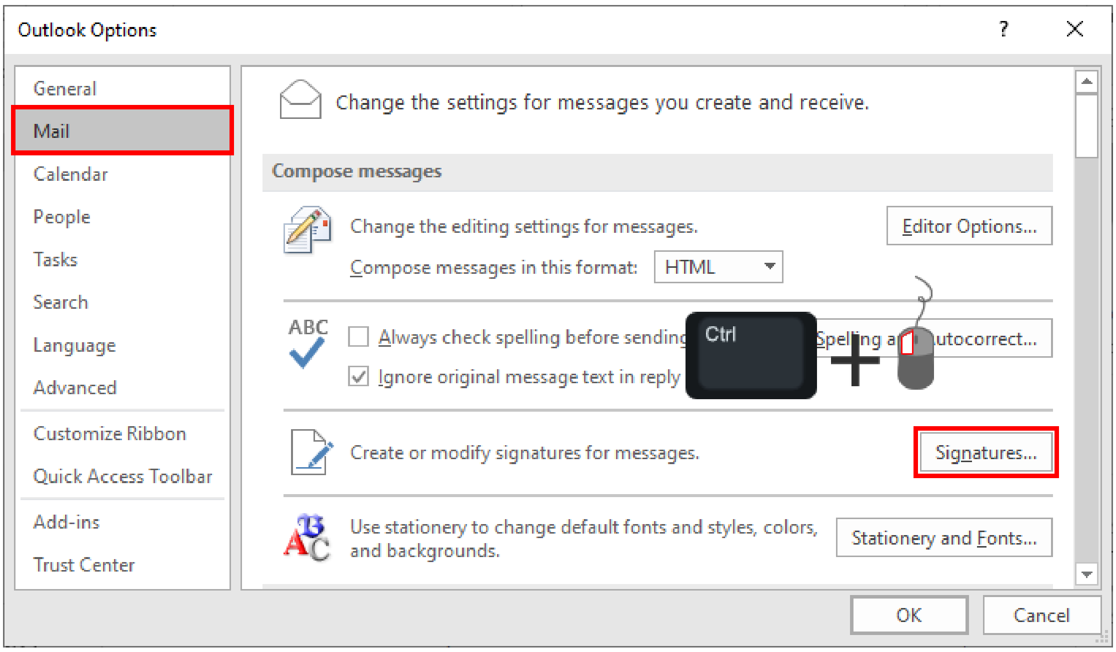
It can be handy to copy and paste the HTML from an existing signature, such as your email client (Outlook). The location of your Outlook signature will depend on which version of Windows you are using and the version of Outlook.

However, if you have Outlook 2013, 2016, or 2019 installed, you can open the *Signature* folder like this:

1. In the Outlook main screen, click *File* in the top left.
2. In the *File* menu, select *Options*.

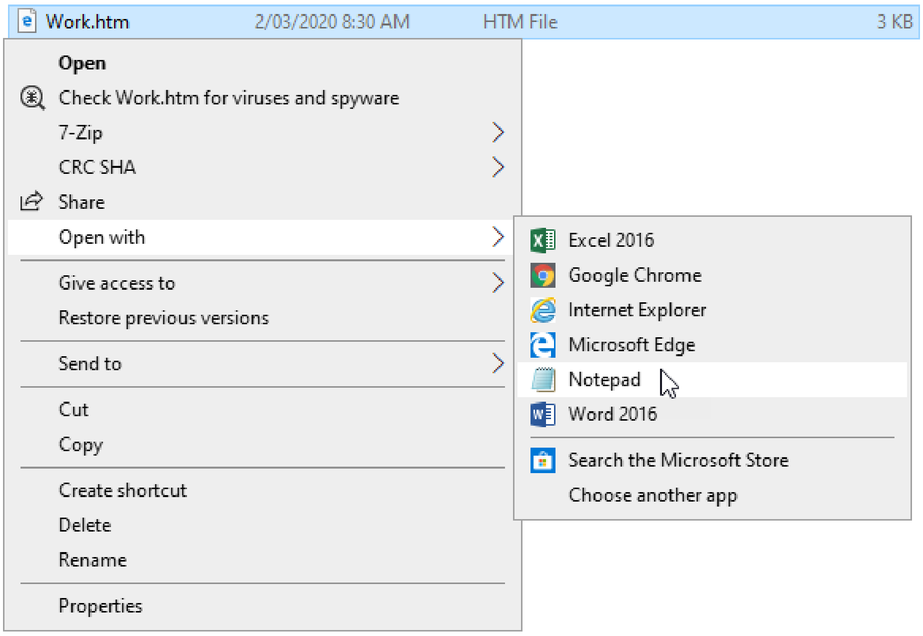


3. In the *Options* menu, select *Mail*, then hold the keyboard *Ctrl* key and left-click the *Signatures...* button.



The signature file is an HTM file with a .htm file extension. The file name and the icon will vary, depending on the Windows settings.

5. Once located, right-click the signature file, hover your mouse cursor over *Open, and* click *Notepad*.



6. Once Notepad opens with all the HTML, select all the text and copy it.
7. Now back in StrataMax, right-click in the signature section in the ***Communication*** window, and select *Insert > Html*.
8. Paste the HTML and click *OK*.

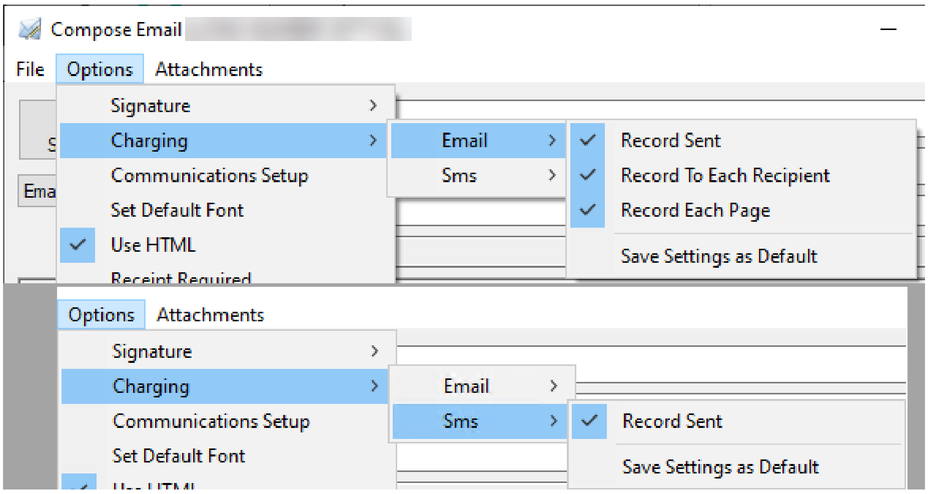
Inserting a Table

Inserting a table can assist with the alignment of an email signature. To insert a table into the signature:

1. Right-click in the signature section and select *Insert > Table.*
2. After changing the *Caption*, *Table*, and *Cell Properties*, click *Insert*.
3. To change the table, right-click on it and select *Table > Properties*.

Charging

The charge options in the ***Communication*** menu will only apply to e-mails and SMS messages sent manually. Automated communications will be charged as per the settings in the ***Disbursements Setup*** menu.



Record Set
Will record only a single e-mail or SMS sent from the ***Communication*** menu, regardless of how many recipients are in the *To...* field. For example, one e-mail to fifty recipients will only record a single e-mail or SMS.

Record To Each Recipient
Will record every e-mail sent from the ***Communication*** menu, for each recipient. For example, one e-mail to fifty recipients will record all fifty e-mails.

Record Each Page
Will record each page of an attachment sent through the ***Communication*** menu.

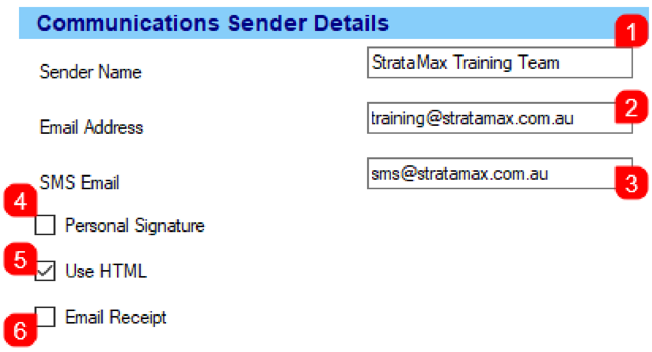
Once all required options have been set, the menu must be opened again to click *Save Settings as Default*.

Communication Setup

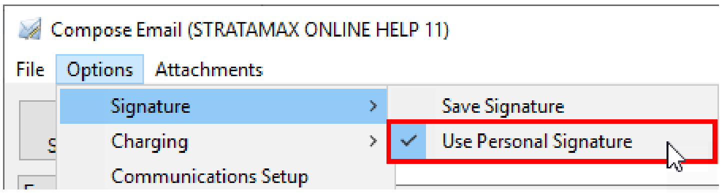
1. Search or select ***Communication*** menu.
2. Click *Options > Communication Setup.*

Communications Sender Details

The Sender Name and Email Address are configured under ***Security Setup***, you may need to discuss with your StrataMax Administrator in your office to arrange for this detail to be updated.

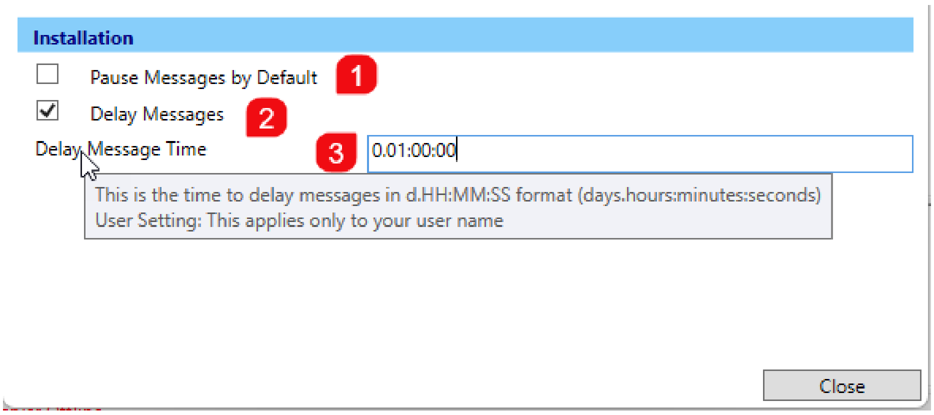


1. **Sender Name** (User Setting configured under ***Security Setup***): The name that will appear as the sender in the recipient's e-mail client.
2. **Email address** (User Setting configured under ***Security Setup***): The e-mail address that the e-mail will appear to be from.
3. **SMS Email** (User Setting): The e-mail address that will appear as the sender on the SMS at the recipient's end.
4. **Personal Signature** (User Setting): Tick to enable insert the personal signature for all e-mails. This is effectively the same as clicking *Options > Signature > Use Personal Signature*.



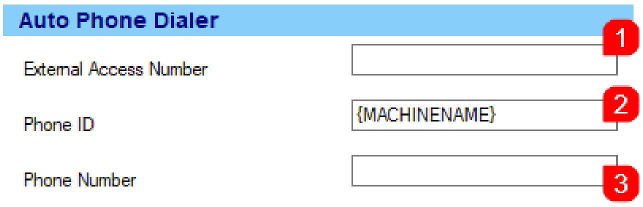
5. **Use HTML:** Allows the formatting and framework of an email to be displayed in a graphic / link supported message type.
6. **Email Receipt:** Requests an email receipt for emails sent manually from the system. This does not include global or bulk functions like *Levies* or *EFTs Remittance Advices*.

Installation (Pausing and Delay Messages)



1. **Pause Messages by Default:** Will allow emails and faxes to be viewed in the Communication Log, and will not be sent without manual confirmation.
   - The ***Security Setup*** permission for this is named 'Pause Messages'.
2. **Delay Messages:** Will place a delay on all emails sent within StrataMax. It should be used in conjunction with the *Delay Message Time* field. Any emails that are subject to a delay, will appear with a *ready* Status in the Communication Log until the delay timer expires. *(Global setting)*.
   - The ***Security Setup*** permission for this is named 'Delay Messages'.
3. **Delay Message Time:** Used in conjunction with the above setting. The field format is in **days.hours:minutes:seconds**.

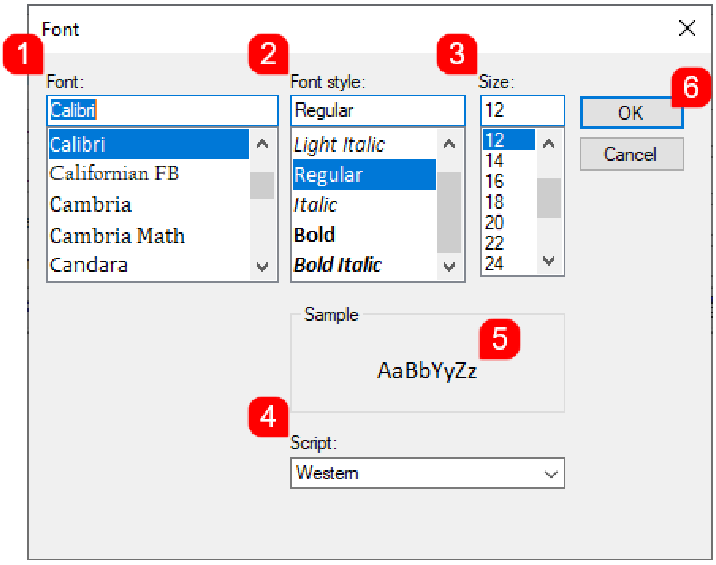
Auto Phone Dialer



1. **External Access Number:**
2. **Phone ID:**
3. **Phone Number:**

Set Default Font

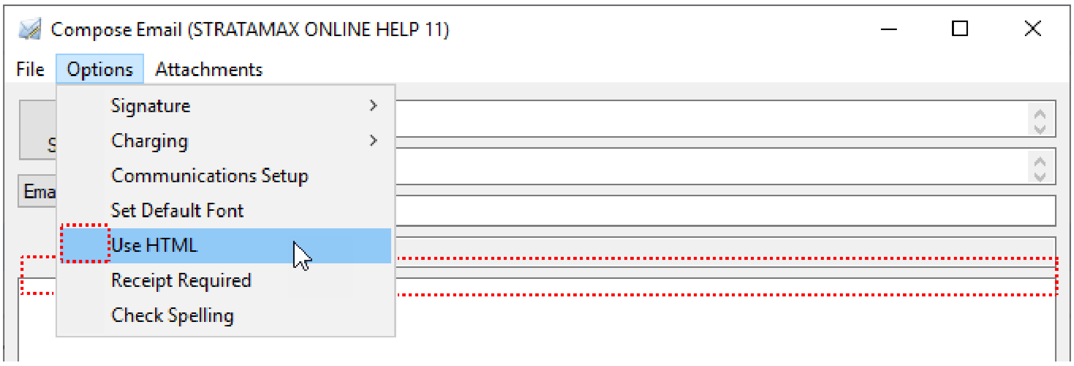
This opens the *Font* window where the default font for the body of the e-mail can be chosen.



1. Select the *Font*.
2. Select the *Font Style*.
3. Select the *Size*.
4. Select the *Script* (*Western* is the default).
5. Check that the Sample looks like what is required.
6. Click *OK*.

Use HTML

This is ticked by default and is recommended. By removing the tick, the editing toolbar in the Compose Email window will disappear. See step 5. in the *Compose E-mail* section at the top of this article.



Receipt Required

When ticked, a delivery receipt will be requested from the e-mail recipient. Similar to the *Request a Delivery Receipt* setting found in Outlook.

Check Spelling

StrataMax can also check the spelling of emails before being sent. Just click this option right before click the *Send* button.

1. If any misspelled or unknown words are detected, it will display the content of the e-mail, with any unknown/misspelled words in red.
2. To change the word you can either type the replacement word manually into the *Replace with:* field or click one of the words in the *Suggestions:* field, then click the *Replace* button.
3. Click the *Replace All* button to replace this word throughout the whole email.
4. Clicking *Ignore* or *Ignore All* ignore the spelling error.
5. Clicking *Add* will add the word to the dictionary and it will no longer be flagged as an incorrect word in future emails from the ***Communications*** menu.
6. The *Options* will display the general options available for how the dictionary in StrataMax works and what configuration is available.

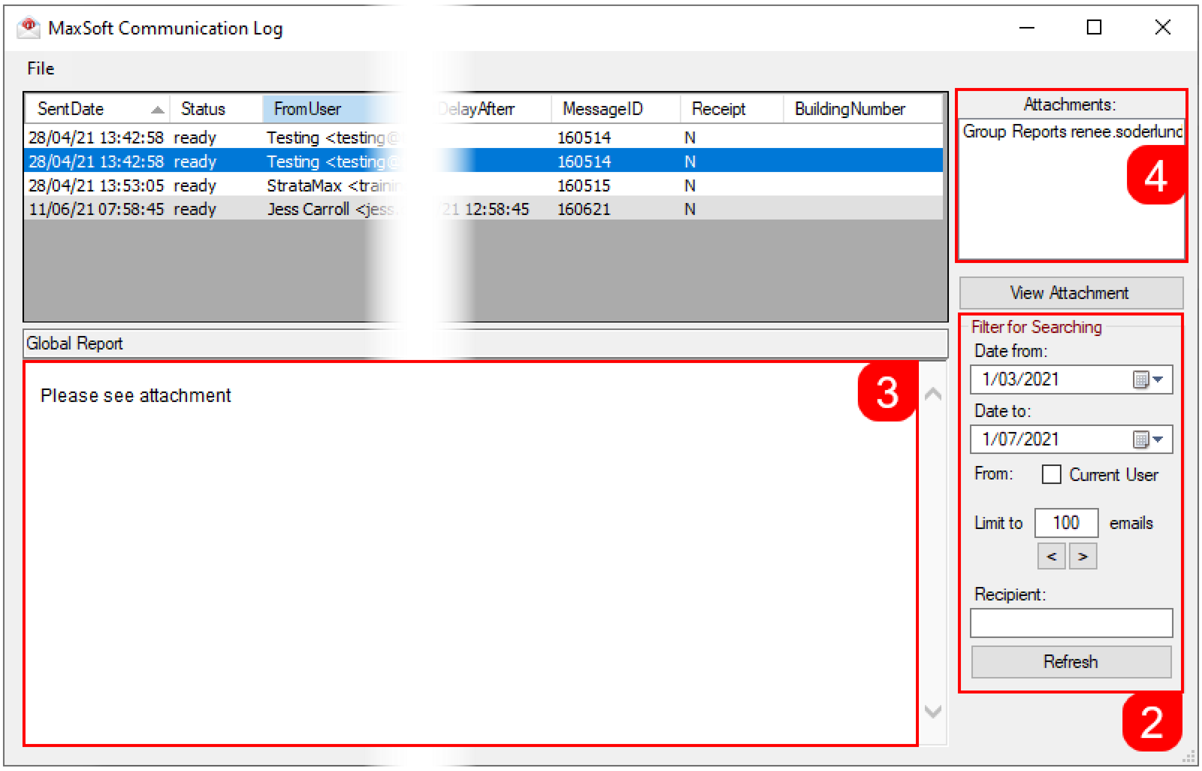
File | View Log

The *Communication Log* displays a history of any email that has been sent from within StrataMax. This includes emails that were sent manually or via various processes, such issuing of levies. This can be used to check email addresses and dates for troubleshooting emails that an owner claims they didn't receive for example.

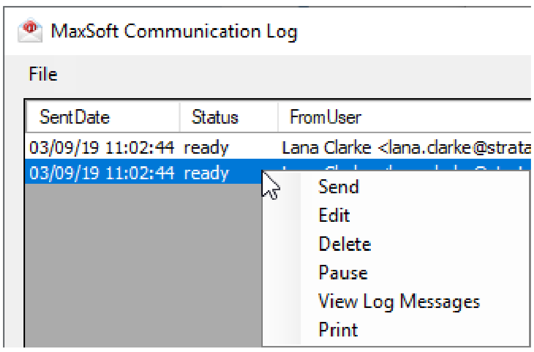
The top section displays a list of emails in a table with various headers. An important header to make a note of is the *Status* header. Different *Status'* have different meanings, which affect which actions can be performed on that email. The bottom section contains the body of the email.

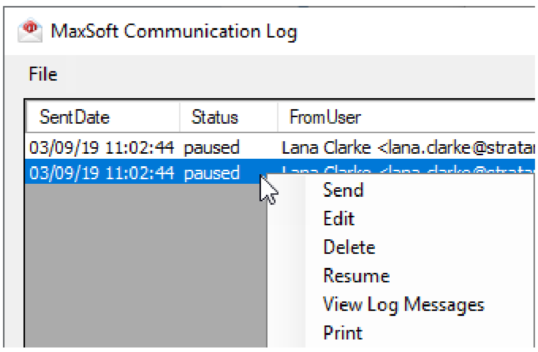
> The building number will only be recorded for any new emails sent after you were updated to version 5.6.22. All other emails will not appear to have a building number. If a Global report is generated for a number of different buildings the building number in the email log will be displayed as blank.

1. From with the ***Communication*** window, click *File > View Log*.
2. Use the filters on the right side:
   - *Date from:* and *Date to:* fields to select a date range.
   - *From: Current User* tick box should <u>not</u> be ticked to display e-mail from all StrataMax users.
   - *Limit to # emails* field to display a certain number of emails.
   - *Recipient:* field to enter part of or the whole name of a recipient, which will search the *Recipient* column after clicking the *Refresh* button.
3. The body of the email will be displayed in the bottom section of the screen.
4. The *Attachment* field in the top right will display any files that are attached to the email selected from the list. Double-click the file to open it, or click the *View Attachment* button.



5. Right-clicking an email in the list will display a sub-menu with contextual options, so some of them won't always be available :





Send

Will send an email that has a Status of *ready*, or if it has a status of *Sent* it will ask you if you would like to send it again.

Edit
Will let you edit the body of an email that has a Status of *ready* or *paused*. The editing is done in the bottom section of the screen, and the *Save Changes* button must be clicked before sending the email. Click the *Cancel Edit* button to discard any changes.

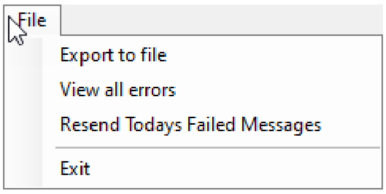
Delete
Will place the email into a *deleted* Status. A confirmation will display before deletion. If the email was previously in a *ready* Status, it will <u>not</u> be sent after the delay expires.

Pause/Resume
Changes an email Status of from *ready* to *paused*, or vice versa.

View Log Messages
Displays a more detailed breakdown of the different stages of the email.

Print
Will print the body of the email. The Windows printer dialogue will appear first to let you change any preferences.

View Log | File Menu



Export to file
Exports the current log to a .xml file, which can be opened in Excel.

View all errors
If there are any errors in the log, using this option will open a new window with only the e-mails that have errors.

Resend Todays Failed Messages
Will attempt to resend any messages that failed that day.

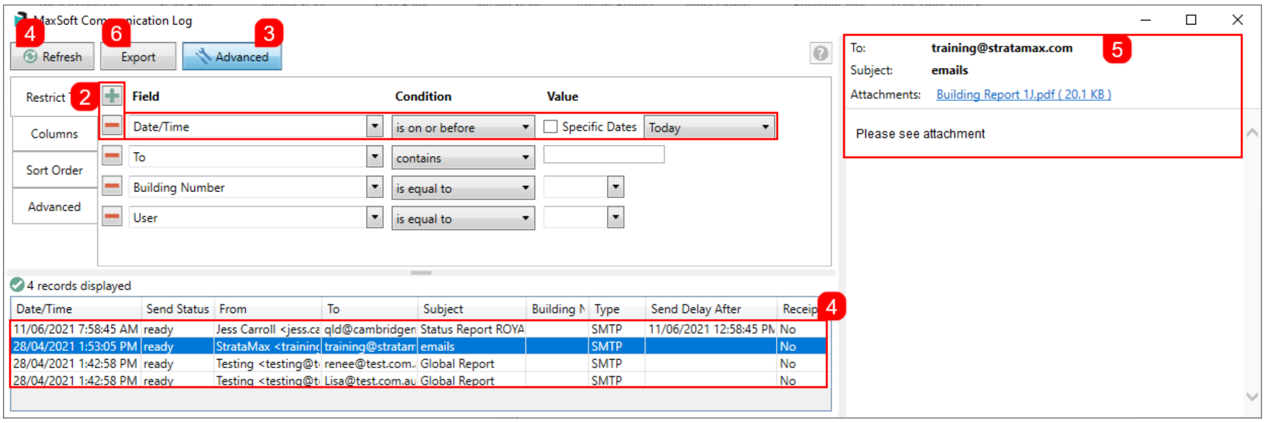
File | Search Logs

This menu has been designed for users to locate specific emails by apply filtering criteria and narrow down the searches to specific buildings and/or users. *Columns*, *Sort Order*, and the maximum number of results can be limited from 10 to unlimited. Results can be restricted with the following fields:

- Building Number
- Date/Time
- From
- Id

- Receipt Requested
- Send Delay After
- Send Status
- Subject
- To
- Type
- User (This will only be available if the user searching has permissions to search other users)

1. Open the ***Communication*** menu and click *File > Search Logs*.
    - By default, some **Filters** are already added, so if those meet your requirements, simply click the *Refresh* button.
    - If more **Filters** need to be added, proceed to the next step.
2. Click the green 'plus' button to add another filter or the red minus button to remove a filter.
    - Select the required **Field** from the drop-down list.
    - Select the relevant **Condition**, which is dynamic and will vary depending on which **Field** you have selected.
    - Select the appropriate **Value**, which is dynamic and will vary depending on which **Field** and **Condition** you have selected.
3. Click the *Advanced* button to reveal these tabe:
    - *Columns* lets you choose which columns you'd like displayed in the results window.
    - *Sort Order* lets you choose the order in which you'd like your results displayed. Newest to Oldest, by building number, etc.
    - *Advanced* has a drop-down menu to choose *Maximum Number of Records to Retrieve,* varying from 10 to unlimited.
4. After clicking the *Refresh* button, the results will be displayed.
5. Click on one of the e-mails to display its contents as well as a links to any attachments in the preview window on the right.
6. Click the *Export* button to export the table of results to Excel.



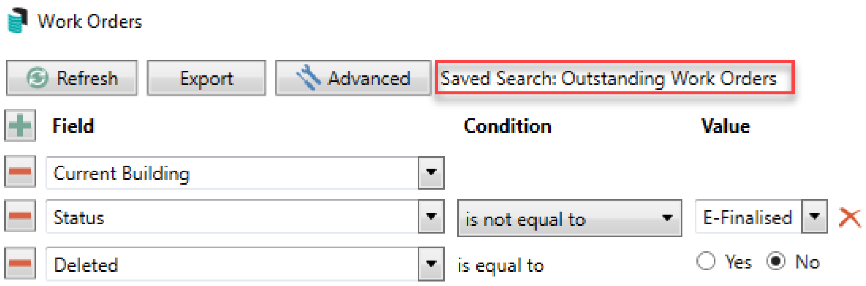
Search Logs | Saved Searches

'Saved Searches' are designed for convenience so that you can save a selection of fields, columns, and a specific sort order so that it can be loaded later.

'Saved Searches' can also be set as the 'default' search for the selected screen. This means that the selection of fields, columns, and specific sort order will be the one chosen whenever the menu screen/icon is selected.

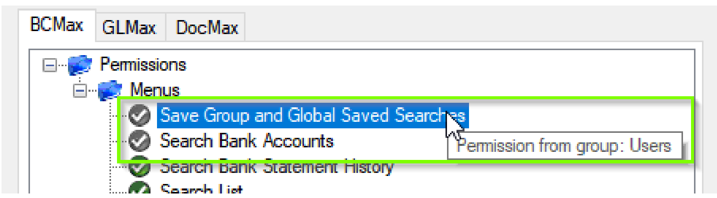
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

> If a Saved Search is loaded/opened this will be noted at the top of the search screen.

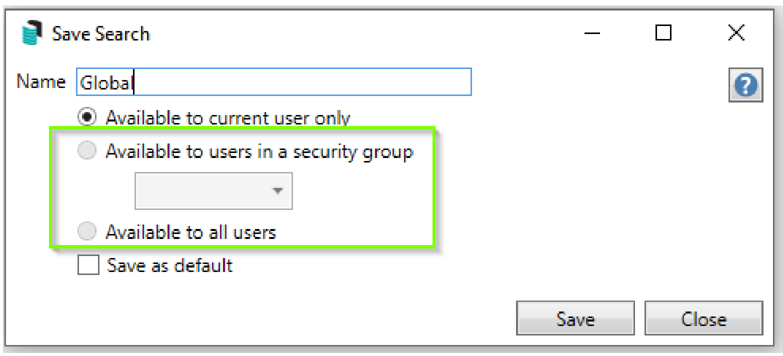


Saved Searches | Security Setup Permissions

A security permission will either allow or deny individual *Users* or *User Groups* access to create or delete a search. The permission is called ‘Save Group and Saved Searches’ under the 'Menus' category in ***Security Setup***. You can also type the word ‘Search’ into the filter field and click the *Filter* button to see the permission.



If the *User* or *User Group* do not have the permission set to 'Allow' then the ability to save a search for all users or a user group will be inactive.



Saved Searches | Set up a new Saved Search

1. Configure the required fields and click the *Refresh* button to display the required data.
    - Optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
2. Click the *Refresh* button to display the data.
3. Click the *Save Search As* button, and the 'Save Search' window will appear.
4. Enter a 'Name'.
5. Select one of the three radio buttons, depending on your requirement:
    - *Available to current user only* will save the search for the current user only.
    - *Available to users in security group* will save the search for the *User Group* selected from the drop-down (this radio button is only available if you have the right permission, and the *User Groups* available in this list are limited to the *User Groups* that you are a member of).
    - *Available to all users* will save the search for all StrataMax users (this radio button is only available if you have the right permission).
6. Optionally tick the *Save as default* box to load this 'Saved Search' whenever the menu screen/icon is opened.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search*, or click the red cross button to delete the *Saved Search*.
3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh automatically and load the *Saved Search* data.
4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

When a Saved Search is loaded/opened, the Saved Search name will be noted at the top of the search screen.

Saved Searches | Edit a Saved Search

1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required fields, and optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
4. Click the *Refresh* button to display and check the data.

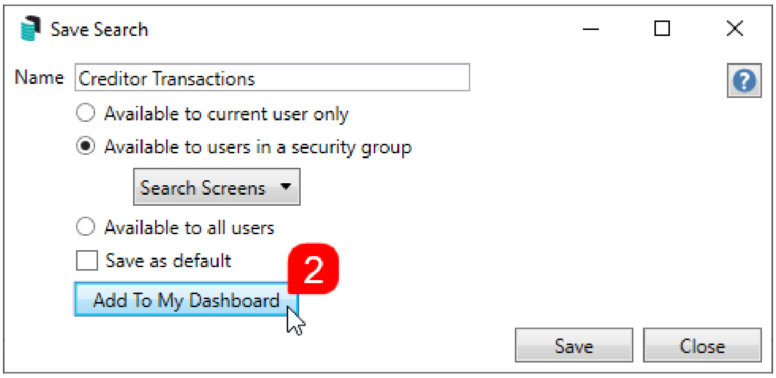
5. Click the *Save Search* button to save the applied changes.

Saved Searches | Add To My Dashboard

There is the option to add certain searches to your own ***Dashboard***. This is limited to your own ***Dashboard*** only (you cannot add it to the ***Dashboard*** of another user or group), and only available in these specific 'Search' screens:

- ***Search Office Bearers***
- ***Search Bank Accounts***
- ***Search Creditor Invoice Items***
- ***Search Work Orders***
- ***Search Quotes***
- ***Search Building***
- ***Search Inspections***
- ***Search Levies***
- ***Management Fees Report***

1. Follow the steps to set up a new Saved Search, or edit a Saved Search (see the two relevant sections above).
2. In the 'Save Search' window, click the *Add To My Dashboard* button.



3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See *Display Types* for more information.
7. Tick *Show On Desktop* if preferred.
8. Depending on which *Display Type* was chosen, the fields for the different number values will change. Observe the *Preview* to assist with picking the right number values suited to the *Display Type.*
9. Click the *Save* button.
10. Back in the 'Save Search' screen, there are now buttons to *Edit Dashboard* and *Delete Dashboard.*
11. Click the *Close* buttons on any remaining screens.

Examples of Searches for Dashboard

The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes and your particular setup of Restrict To, Display Columns and Sort Order may vary to suit your requirements.

Last AGM where minutes have not been sent (Search Buildings)

Restrict To:

Field	Condition	Value
Building Name	starts with	
AGM Last Meeting Date/Time	is on or before	Specific Dates 2 weeks in the past
AGM Last Meeting Minutes Sent	is empty	

Displayed Columns:

Displayed Columns
Building Number
Building Name
Account Manager
AGM Last Meeting Date/Time
AGM Last Meeting Minutes Sent

Assigned Team Members (Search Buildings)

Restrict To: No requirements however you may filter by Account Manager for example

Displayed Columns:

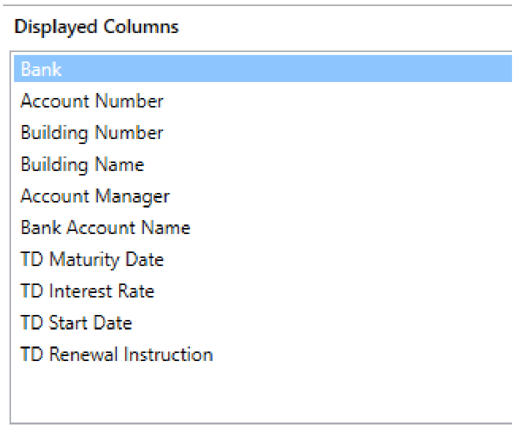
Displayed Columns
Building Number
Building Name
Account Manager
Account Manager Assistant Name
Strata Finance Manager Name
Asset Manager Name

Term Deposits maturing in next 30 days where no instruction has been provided (Search Bank Accounts)

Restrict To:

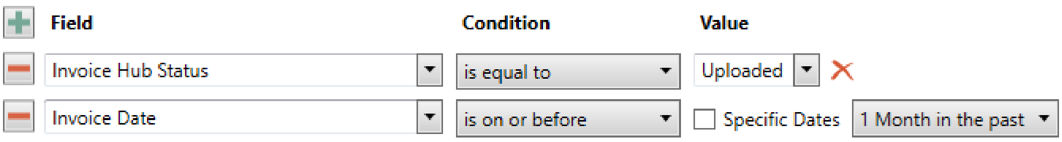
Field	Condition	Value
Building Number	is equal to	
Status	is not equal to	Removed
Account Code	is not equal to	012 - CASH AT BANK
TD Maturity Date	is in the next 30 days	
TD Renewal Instruction	is empty	

Displayed Columns:

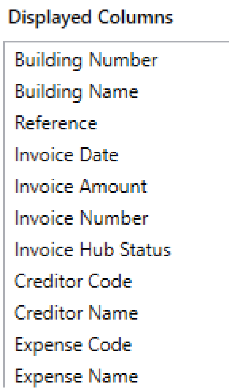


Creditor Invoices Awaiting Invoice Hub Approval & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

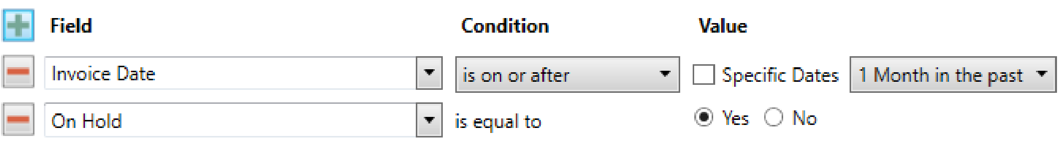


Displayed Columns:



Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:



Displayed Columns:

Displayed Columns
Building Number
Building Name
Reference
Invoice Date
Invoice Amount
Invoice Number
On Hold
Invoice Hub Status
Creditor Code
Creditor Name
Expense Code

Inspections due in next 30 days (Search Inspections)

Restrict To: setting the category to specific values allows dashboards specific to inspection types.

Field	Condition	Value
Category	is equal to	Sinking Fund Forecast
Next Due	is in the next 30 days	

Displayed Columns:

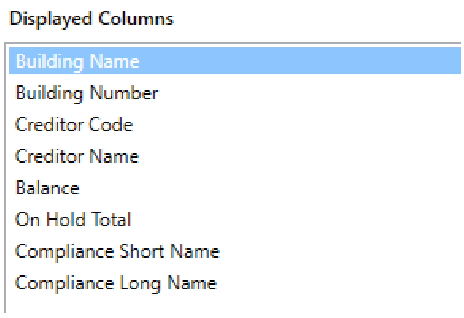
Displayed Columns
Building Number
Building Name
Category
Period
Next Due
Last Due
Inspected By Code
Inspected By Name
Result
Result Rating

Identify Creditors with no Compliance Code that have had recent activity

Restrict To:

Field	Condition	Value
Compliance Short Name	is empty	
Last Activity	is in the last 7 days	

Displayed Columns:



SMS Functionality

To enable the SMS functionality within StrataMax you will need to establish an account with a telecommunications service provider to send a message. The StrataMax Support team will then need to configure the provider's IP address to forward emails to for conversion into SMS messages. The service provider then forwards these messages to a mobile phone as an SMS.

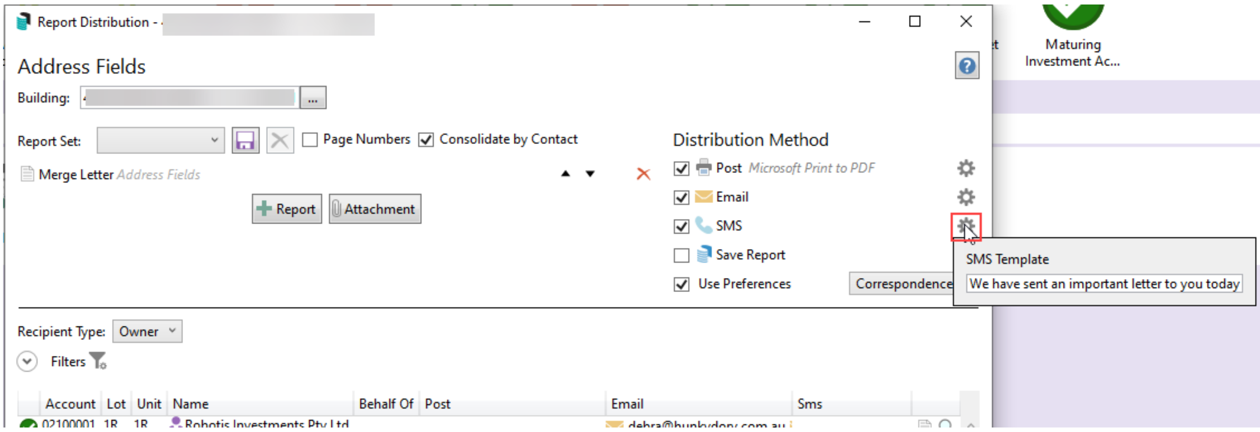
When speaking with the service provider, please be fully aware of the costs involved in sending messages via SMS, as costs vary depending on the account type as well as how many SMS you plan on sending each month. All charges to both the building and the recipient should be confirmed at the time of arranging an account with a telecommunication service provider.

StrataMax takes no responsibility for high usage or volume charges encountered as a result of this service. It would be worth considering charging a fee to owners or recipients to warrant utilising this feature.

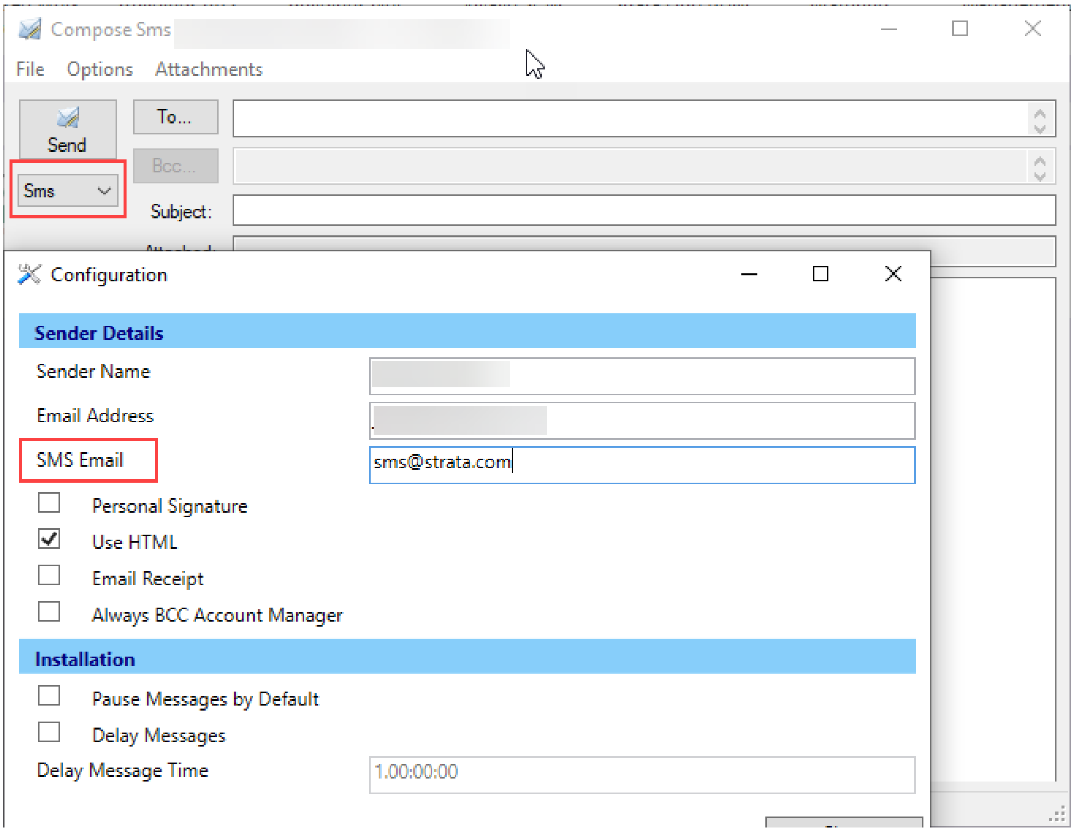
This option must be investigated to its full potential for integration between StrataMax and the SMS service provider to ensure connectivity.

Important information for sending an SMS through StrataMax:

- There is no Subject line on an SMS message, only text from the body of the email window.
- Formatting will not be kept; like standard SMS messages, it will be treated as one line, as this is how the recipient will receive it.
- The Report Distribution window will allow multiple buildings to send an SMS based on the SMS template set.



- The alternative method is available via the ***Communications*** menu, which is a per building option.



To initiate the SMS option, please e-mail the StrataMax Support Team at *support@stratamax.com.au*

See the SMS Broadcast website for more information: *https://www.smsbroadcast.com.au/*