Release Notes - Version 5.6.22

StrataMax has been dedicated to meeting the needs of Strata Managers for over 20 years through the continual enhancement of our software suite. We are committed to providing new functionality to support you in servicing your clients and to provide opportunities for you to optimize efficiency within your office environment.

This document describes exciting new features and enhancements available in the above release.

A history of Release Notes can be reviewed on the StrataMax Online Help



THE COMPLETE STRATA MANAGEMENT SOLUTION





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What's New

1. Communication Module Enhancements

Enhancements have been made to the Communication module to record the building number when emails have been sent via StrataMax and provide the ability to search and filter by Building.

1.1 Sent Emails – Record Building Number

A new column has been added to the Communications module to record the building number when emails are sent via StrataMax. This will allow users to search the communications logs for all correspondence relating to a specific building. To review this change, please use the steps below:

- 1. Navigate to 'Communication module'
- 2. Click on 'File'
- 3. Select 'View Log'
- 4. New field 'Building Number' will show in the Communications Log

MaxSoft Communication Log											
File				Emails Found: 10							
SentDate	Status	FromUser	Recipient	Subject	SentAs	Туре	SendDelayAfterr	MessageID	Receipt	BuildingNumber	
27/04/21 15:41:24	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	terrare and the second	Levy Notice0210000116999	то	SMTP		1195	N		
27/04/21 15:46:30	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	THE REPORT OF A	Levy Arrears Notice - A/c 02100001-L	TO	SMTP		1196	N		
27/04/21 15:52:04	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	phone in the second second	DocMax Document	то	SMTP		1197	N		
27/04/21 15:52:04	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	and the second second	DocMax Document	BCC	SMTP		1197	N		
27/04/21 15:57:42	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	and all the second second	L6999Work Order to Contractor	то	SMTP		1198	Y		
27/04/21 16:00:22	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	CONTRACTOR AND A	Quotation-16999 #00000135	то	SMTP		1199	Y		
28/04/21 09:08:53	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	The second state of the	Contraction of the second s	то	SMTP		1200	N	16999	
28/04/21 10:12:51	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	A REAL PROPERTY.	TESTING PBI 159427	то	SMTP		1202	N	16999	
28/04/21 10:15:03	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	international distance into	Finanicals	то	SMTP		1203	N	16999	
28/04/21 10:15:03	ready	Renee <renee.soderlund@stratamax.com></renee.soderlund@stratamax.com>	and the second se	Finanicals	BCC	SMTP		1203	N	16999	

1.2 New Email Search Log

A new search log has been added to the Communications module. This will allow users to apply filtering criteria and narrow down the searches to Building and/or user specific. Searching fields that are available are:

- Building Number
- Date/Time
- From
- Id
- Receipt Requested
- Send Delay After
- Send Status
- Subject
- To

- Type
- User (Please note: This will only be available if the user searching has permissions to search other users)

Sort Order and Display columns can also be configured. To utilise the new search please follow the below steps:

- 1. Navigate to 'Communications module'
- 2. Click on 'File'
- 3. Select 'Search Logs'
- 4. Add the required fields from the drop-down lists and associated values

MaxSoft Communication Log				
🕞 Refresh 🛛 Export	Advanced			
🛨 Field	Condition	Value		
Date/Time	▼ is on or after	Specific Dates 1 week in the past	•	
То	▼ contains	r		
Building Number	▼ is equal to	•		
User	is equal to	renee.soderlund		
Building Number	7			
Date/Time				
From				
Id				
Receipt Requested				
I Send Delay After				
Dat Send Status	То	Subject	Building Nurr	Туре
28/C Subject	TEST@TEST.com.au	Finanicals	16999	SMTP
28/C To	tenconnect@yahoo.com	Finanicals	16999	SMTP
28/0 Type	renee@Testing.com.au	TESTING PBI 159427	16999	SMTP
28/0 User	tenconnect@yahoo.com	CYPRESS APARTMENTS CTS 16999	16999	SMTP
27/04/2021 4:00:22 Pivi ready r	enee <renee service@fvs.com.au<="" th=""><th>Quotation-16999 #00000135</th><th></th><th>SMTP</th></renee>	Quotation-16999 #00000135		SMTP

- 5. Click 'Refresh'
- 6. Records will then be displayed and preview window, if a document was attached to the email

MaxSoft Communicatio	n Log									
3 Refresh Export	Ad	vanced						To:	service@fvs.com.au	
								Subject	Quotation-16999 #00000135	
🛨 Field		Condition	Value					Attachments	s Quotepdf (145 K8)	
Date/Time		 is on or after 	Specific Dates 1 week in the past							
То		 contains 						Quotation	h Request - See attachment	
Building Number		 is equal to 								
- User		 is equal to 	renee.soderlund *					Test Test	 Internation 	the second se
								W look	A DEVICE AND A DEV	
									2 DESCRIPTION OF	
								Global		
					_					
10 records displayed										
Date/Time	Send S Fro	m To	Subject	Building Num	Туре	Send Delay After	Receipt			
28/04/2021 10:15:03 AM	ready Ren	re <renee. td="" test@test.com.au<=""><td>Finanicals</td><td>16999</td><td>SMTP</td><td></td><td>No</td><td></td><td></td><td></td></renee.>	Finanicals	16999	SMTP		No			
28/04/2021 10:15:03 AM	ready Ren	ee <renee.tenconnect@yahoo.com< td=""><td>Finanicals</td><td>16999</td><td>SMTP</td><td></td><td>No</td><td></td><td></td><td></td></renee.tenconnect@yahoo.com<>	Finanicals	16999	SMTP		No			
28/04/2021 10:12:51 AM	ready Ren	ee <renee.renee@testing.com.au< td=""><td>TESTING PBI 159427</td><td>16999</td><td>SMTP</td><td></td><td>No</td><td></td><td></td><td></td></renee.renee@testing.com.au<>	TESTING PBI 159427	16999	SMTP		No			
28/04/2021 9:08:53 AM	ready Ren	e krenee tenconnect@yahoo.com	CYPRESS APARTMENTS CTS 16999	16999	SMTP		No			
27/04/2021 4:00:22 PM	ready Ren	e <renee service@fvs.com.au<="" td=""><td>Quotation-16999 #00000135</td><td></td><td>SMTP</td><td></td><td>Yes</td><td></td><td></td><td></td></renee>	Quotation-16999 #00000135		SMTP		Yes			
27/04/2021 3:57:42 PM	ready Ren	ee <renee_service@fvs.com.au< td=""><td>CYPRESS APARTMENTS16999Work Order to Cr</td><td></td><td>SMTP</td><td></td><td>Yes</td><td></td><td></td><td></td></renee_service@fvs.com.au<>	CYPRESS APARTMENTS16999Work Order to Cr		SMTP		Yes			
27/04/2021 3:52:04 PM	ready Ren	ee <renee.renee@test.com< td=""><td>DocMax Document</td><td></td><td>SMTP</td><td></td><td>No</td><td></td><td></td><td></td></renee.renee@test.com<>	DocMax Document		SMTP		No			
27/04/2021 3:52:04 PM	ready Ren	ee <reneeligalvaniz@value.net.nz< td=""><td>DocMax Document</td><td></td><td>SMTP</td><td></td><td>No</td><td></td><td></td><td></td></reneeligalvaniz@value.net.nz<>	DocMax Document		SMTP		No			
27/04/2021 3:46:30 PM	ready Ren	ee <renee_tenconnect@yahoo.com< td=""><td>Levy Arrears Notice - A/c 02100001-Cypress A</td><td></td><td>SMTP</td><td></td><td>No</td><td></td><td></td><td></td></renee_tenconnect@yahoo.com<>	Levy Arrears Notice - A/c 02100001-Cypress A		SMTP		No			
27/04/2021 3:41:24 PM	ready Ren	e <renee_tenconnect@yahoo.com< td=""><td>Levy Notice0210000116999</td><td></td><td>SMTP</td><td></td><td>No</td><td></td><td></td><td></td></renee_tenconnect@yahoo.com<>	Levy Notice0210000116999		SMTP		No			

Important Note: The building number will only be recorded for any new emails sent after Version 5.6.22 update. 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.

2. TaskMax – Bulk Finalise

Enhancements have been made to reduce the time restriction from 2 years to 1 year in the 'Finalise Old Work Orders' menu option in TaskMax. This will allow users to bulk finalise work orders with the following status's:

- A-Incomplete
- B-Quoting
- D-Issued

To utilise the new enhancement, follow the steps below:

- 1. Navigate to 'TaskMax'
- 2. Click on 'Edit' menu
- 3. Select 'Finalise Old Work Orders'
- 4. New window will appear
- 5. Enter the date you require
- 6. Select the type status to finalise

🔋 Finalise Old Work Orders 🛛 🗙								
Earlier Than:	01/04/2020 🔻							
Status A-Incomplete								
✓ B-Quotir	ng							
D-Issued								
Fina	lise Close							

- 7. Click 'Finalise'
- 8. A message will appear advising the number of Old Work Orders that will be finalised Select 'Yes or No'



9. If there were no work orders matching the criteria the system will return the following message



Please Note: Validation has also been added if the date filter is outside the correct time period.

tatus	Reference Number	Date Entered	Time	ContractorField	Change Building
					New
				_	Open
		Finalise	e Old Work Orders	×	Report
		Earlier Tha	in: 01/01/2021	•	Show Quotes
		Status		_	Close
		A-Inc	omplete		
		D-Issi	ued		
		Date filter	must be on or bef	ore 01/04/2020	
			Finalise	Close	Ontines
				_	Options D

3. Management Fees Report

Improvements have been made to the Management Fees Report. The following criteria has been added to the setup for improved search speed and to prevent the search retrieving records for lost buildings.

- New 'Building Active' Field criteria
- New columns available "Building Active"
- New Sort Order added 'Building Active'
- Change Title of Active Column to 'Fee Active'

3.1 New 'Building Active' field

A new field has been added to the Management Fees Report Setup to allow users to search for Active or Non-Active buildings.

To utilise the new enhancement, follow the steps below:

- 1. Navigate to 'Management Fees Report'
- 2. Click on the' Field +' icon
- 3. Click on the dropdown
- 4. Select new field 'Building Active'

Refresh Export Advanced Field Condition Value Building Number is equal to v v Account Manager v is equal to v v Account Group Account Group Account Group Account Manager Amount Building Active Building Active Building Name Next Part Part Part Part Part Part Part Par	ease Date	Fe
Field Condition Value Building Number Account Manager Account Group Account Manager Amount Build Annual Charge ber Account Manager Auto Increase Pricent Auto Increase Pricent Building Number Building Number Building Number Crediting Active	ease Date	Fe
Building Number Account Manager Account Manager Account Manager Account Manager Account Manager Active Lots Amount Building Active Building Active Building Active Building Active Building Active Building Name Building Name Building Name Building Active Crediting Active Crediting Active Crediting Active Crediting Active Crediting Active Crediting Active Account Manager Account Manager Amount Annual Charge Building Active Building Active Building Active Crediting Active Crediting Account Code	ease Date	Fe
Account Manager Account Group Account Manager Account Annual Charge Account Manager Account Annual Charge Accoun	ease Date	Fe
Account Group Account Manager Active Lots Amount Buil Annual Charge Building Active Building Active Building Active Building Active Building Name Building Name Building Name Building Name Building Name Building Name Building Name Building Name Building Active Building Active Building Name Building Na	'ease Date	Fe
Account Group Account Manager Active Lots Amount Buil Annual Charge Building Charge Building Active Building Active Building Active Building Name Building Name Building Name Building Active Building Active Buildin	rease Date	Fe
Account Manager Active Lots Amount Buil Annual Charge ber Account Manager Amount Annual Charge Frequency Id Next Charge Date Building Active Next Incn Auto Increase Percent Auto Increase Type Building Active Building Name Building Number Crediting Account Code	'ease Date	Fe
Active Lots Amount Bui Annual Charge ber Account Manager Amount Annual Charge Frequency Id Next Charge Date Building Active Next Incn Auto Increase Prcent Auto Increase Type Building Active Building Name Building Name Creditive Account Code	ease Date	Fe
Amount Bui Annual Charge ber Account Manager Amount Annual Charge Frequency Id Next Charge Date Building Active Next Incn Auto Increase Type Building Active Building Active Building Name Creditive Account Code	rease Date	Fe
Auto Increase Prenet Auto Increase Prenet Building Active Building Number Creditor Account Code	rease Date	Fe
Auto Increase Type Building Active Building Name Building Number Creditive Code		
Building Active Building Name Building Number Creditive Account Code		
Building Name by Building Number Creditive Account Code		
Building Number		
Creditor Account Code		
Debtor Account Code		
		se

- 5. Conditions will appear Value Yes/No for selection
- 6. All records will appear as per the criteria selected 'Active Buildings'

🗿 Search Management Fee Setuj	o Items								- 🗆	\times
S Refresh Export	Advanced									(
Field		Condition Val	lue							
Building Number	▼ i	s equal to 🔹	•							
Account Manager	▼ i	s equal to 🔻	•							
Building Active	▼ is	equal to 💿	Yes 🔿 No							
				_						
56 records displayed Building Name	Building Number	Account Manager	Amount	Annual Charge	Frequency	ld	Next Charge Date	Building Active	Next Increase Date	
RS TEST 8	008	, itee and ite and ite	3000.00	12000.00	Quarterly	10	01/01/2021	True		
RS TEST 9	9999		900.00	3600.00	Quarterly	11	01/01/2021	True		
RS TEST 9	0000		80.00	960.00	Monthly	12	01/11/2020	True		
RS TEST 10	101010		10.00	120.00	Monthly	13	01/11/2020	True		
13 1231 10	101010	And	1202.58	14442.06	Monthly	14	01/07/2020	True		
Contraction in the second second	10.00	the second second	275.00	3300.00	Monthly	16	01/11/2020	True		
RECOVERIES2	11122	And Annual States of the State	10.00	520.00	Waakhy	21	02/01/2021	True		
RECOVERIES2	11122	And Street Street Street	12.00	144.00	Monthly	22	01/01/2021	True		
	11122	the second s	52.00	52.00	Earthighthy	22	01/09/2020	True		
CCCVERIES2	11/112		12.00	12.00	Quartarly	2.5	01/02/2020	True		
CC3005	101010		1200.00	15600.00	Monthly	20	01/05/2021	True		
RECOVERIESS	11122	And the second second second	255.00	255.00	Appually	30	01/10/2020	True	28/11/2020	
	11144	And State and State	255.00	255.00	Annually	22	01/06/2021	True	01/06/2021	
and the second se	30505	Comments.	1600.00	19200.00	Monthly	32	01/00/2021	True	01/00/2021	
OC TEST O	0000		100.00	400.00	Quarterly	34	01/12/2020	True	01/03/2021	
MANAGEMENT EEES TEST	24267		5000.00	20000.00	Quarterly	25	01/01/2021	True	01/03/2021	
ANAGEMENT FEES TEST	24307		2000.00	20000.00	Quarterly	26	01/02/2021	True		
MANAGEMENT FEES TEST	24307		2000.00	42000.00	Monthly	27	20/01/2021	True		
MANAGEMENT FEES TEST	24307		1200.00	42000.00	Monthly	20	01/11/2020	True		
	1112	Read and an other	250.00	1000.00	Quartarly	20	01/02/2021	True		
STMUT	5547	from Industry	100.00	5200.00	Weekly	40	20/11/2020	True		
	0000		1200.00	14400.00	Monthly	40	01/11/2020	True		
	11122	And Street and Street	2000.00	24000.00	Monthly	41	01/01/2020	True		
ALCOVENIES2	102017	from Indextoni	2000.00	24000.00	Monthly	42	01/12/2020	True		
Sector Sector	102017		50.00	600.00	Monthly	45	01/12/2020	True		
	102017	Second Second and	50.00	600.00	Monthly	44	01/12/2020	True		
	102017		50.00	000.00	Monthly	45	01/12/2020	nde		
<										>

3.2 New Building Active Column and Sort Order available

When Setting up the Management Fees report, a new column has now been made available 'Building Active' this will allow users to report if a building is active or not.

To setup this criterion, follow the below steps:

- 1. Navigate to 'Management Fees Setup'
- 2. Set up the required Filters

Search Man	Search Management Fee Setup Items										
🕞 Refresh	Export Advanced										
Restrict To	Field	Condition	Value								
Columns	Building Number	▼ is equal to ▼	•								
Sort Order	Account Manager	▼ is equal to ▼	•								
Advanced	_										

- 3. Select 'Advance'
- 4. Click 'Columns'
- 5. In the Available Columns 'Building Active' will now be available
- 6. Highlight the column, click on add
- 7. This will add 'Building Active' to the display columns

Search Mana	agement Fee Setup Items			-		×
Refresh	Export Advanced					?
Restrict To	Available Columns		Displayed Columns			
Columns	Filter Account Group	^	Annual Charge Frequency		^	
Sort Order	Active Lots Auto Increase Percent	Add >	Id Next Charge Date			^
Advanced	Auto Increase Type	< Remove	Next Increase Date			\checkmark
	Creditor Account Code	\sim	Building Active		\sim	

- 8. Click on 'Sort Order' Option
- 9. The 'Building Active' is available to be a sort order if required
- 10. Highlight 'Building Active', click Add

Search Mana	Search Management Fee Setup Items - C X									
🛞 Refresh	Export					0				
Restrict To	Available Columns		Sorted Columns							
	Filter		Building Active	False F	irst					
Columns	Building Name	•	-							
	Building Number									
Sort Order	Creditor Account Code	Add >				\sim				
Advanced	Debtor Account Code	< Remove				\sim				
- Advanced	End Date									
	F 0.1.0.11									

- 11. The 'Building Active' can be sorted by, False First or True First
- 12. Click on Refresh display records will be displayed based on criteria set

Search Mana	agement Fee Setup It	ems		*****	<u> </u>					- 0	×
🛞 Refresh	Export	Advanced									?
Restrict To	Available Columns					Sorted Colun	nns				
	Filter					Building Acti	ive			False First	
Columns	Account Group			^							
Sort Order	Account Manager				Add >						
	Active Lots				- D						
Advanced	Amount				< Remove						
	Annual Charge			~							
/1 records di	isplayed						_		A	•	
Building Name		Building Number	Account Manager	Amount	Annual Charge	Frequency	ld	Next Charge Date	Building Active	Next Increase Date	
RS TEST 2		002		424.00	5088.00	Monthly	2	01/10/2020	False	10/09/2020	^
RS TEST 3		003		45.00	540.00	Monthly	4	01/10/2020	False		_
RS TEST 5		005		3455.00	41460.00	Monthly	6	01/10/2020	False		
RS TEST 7		007		444.00	5328.00	Monthly	9	01/11/2020	False		
RS TEST 6		006		500.00	6000.00	Monthly	20	01/10/2020	False	01/01/2021	
RS TEST 7		007		60.00	5040.00	Monthly	26	01/09/2020	False		
RS TEST 7		007		1300.00	15600.00	Monthly	28	01/11/2020	False		
RS TEST 1		001	New College	560.00	6720.00	Monthly	1	01/10/2020	False		
RS TEST 3		003		2355.00	28260.00	Monthly	3	01/10/2020	False		
RS TEST 4		004		60.00	720.00	Monthly	5	25/10/2020	False		
RS TEST 5		005		324.00	1296.00	Quarterly	7	01/10/2020	False		
RS TEST 1		001	Normal Contractors	100.00	400.00	Quarterly	17	01/12/2020	False		
RS TEST 7		007		70.00	5880.00	Monthly	25	01/11/2020	False		
RS TEST 6		006		1200.00	4800.00	Quarterly	27	01/12/2020	False		
RS TEST 7		007		130.00	23660.00	Month End	29	01/11/2020	False		
Contract of the		30595	Provide State	1600.00	19200.00	Monthly	33	01/11/2020	True		
IMPORT BUILDI	ING TEST	4566		658.06	7896.72	Monthly	67	01/02/2022	True	01/01/2023	
MANAGEMENT	FEES TEST	24367		5000.00	20000.00	Quarterly	35	01/01/2021	True		
IMPORT BUILDI	ING TEST	4566		3000.00	12000.00	Quarterly	70	01/02/2022	True		
MANAGEMENT	FEES TEST	24367		3500.00	42000.00	Monthly	37	30/01/2021	True		
RS TEST 8		008		12000.00	48000.00	Quarterly	72	01/02/2021	True		
RECOVERIES1		1112	and the second se	250.00	1000.00	Quarterly	39	01/03/2021	True		
IMPORT BUILDI	ING 2	22		6000.00	24000.00	Quarterly	74	01/04/2022	True		
RS TEST 9		9999		1200.00	14400.00	Monthly	41	01/11/2020	True		
TESTCOMPCHA	NGE3	77757	International Astronomy Party	100.00	400.00	Quarterly	76	01/06/2021	True		
ATTACK PARTY.	10	102017	Name (Address)	500.00	6000.00	Monthly	43	01/12/2020	True		
<									-		>
										Clo	ose

13. Click 'Export'

14. Report will open in Excel showing the new reporting fields

Management Fee Setup Items										
Building Name	Building Number	Account Manager	Amount	Annual Charge	Frequency	Id	Next Charge Date	Building Active	Next Increase Date	Fee Active
RS TEST 2	002		424.00	5088.00	Monthly	2	1/10/2020	No	10/09/2020	Yes
RS TEST 3	003		45.00	540.00	Monthly	4	1/10/2020	No		Yes
RS TEST 5	005		3455.00	41460.00	Monthly	6	1/10/2020	No		Yes
RS TEST 7	007		444.00	5328.00	Monthly	9	1/11/2020	No		Yes
RS TEST 6	006		500.00	6000.00	Monthly	20	1/10/2020	No	1/01/2021	Yes
RS TEST 7	007		60.00	5040.00	Monthly	26	1/09/2020	No		No
RS TEST 7	007		1300.00	15600.00	Monthly	28	1/11/2020	No		Yes
RS TEST 1	001	Renee Soderlund	560.00	6720.00	Monthly	1	1/10/2020	No		Yes
RS TEST 3	003		2355.00	28260.00	Monthly	3	1/10/2020	No		Yes
RS TEST 4	004		60.00	720.00	Monthly	5	25/10/2020	No		Yes
RS TEST 5	005		324.00	1296.00	Quarterly	7	1/10/2020	No		Yes
RS TEST 1	001	Renee Soderlund	100.00	400.00	Quarterly	17	1/12/2020	No		Yes
RS TEST 7	007		70.00	5880.00	Monthly	25	1/11/2020	No		Yes
RS TEST 6	006		1200.00	4800.00	Quarterly	27	1/12/2020	No		Yes
RS TEST 7	007		130.00	23660.00	Month End	29	1/11/2020	No		Yes
CONTRACTOR OF A DATE	30595	(and a second se	1600.00	19200.00	Monthly	33	1/11/2020	Yes		Yes
And the second second	4566		658.06	7896.72	Monthly	67	1/02/2022	Yes	1/01/2023	Yes
CONTRACTOR OF THE OWNER.	24367		5000.00	20000.00	Quarterly	35	1/01/2021	Yes		Yes
Address Standards State	4566		3000.00	12000.00	Quarterly	70	1/02/2022	Yes		Yes
CONTRACTOR OF THE OWNER.	24367		3500.00	42000.00	Monthly	37	30/01/2021	Yes		Yes
and Table 1	008		12000.00	48000.00	Quarterly	72	1/02/2021	Yes		Yes
ALCO PAGE	1112	And A Design	250.00	1000.00	Quarterly	39	1/03/2021	Yes		Yes
STORY SHOWS A	22		6000.00	24000.00	Quarterly	74	1/04/2022	Yes		Yes
ALC: NOT THE OWNER OF THE OWNER OWNE	9999		1200.00	14400.00	Monthly	41	1/11/2020	Yes		Yes
The second s	77757	torial disease to a second second	100.00	400.00	Quarterly	76	1/06/2021	Yes		Yes
and the second se	102017	have balanced	500.00	6000.00	Monthly	43	1/12/2020	Yes		Yes
All Contractor and	102017	forms industry	50.00	600.00	Monthly	45	1/12/2020	Yes		Yes
IN THE OWNER	9999		900.00	3600.00	Quarterly	11	1/01/2021	Yes		Yes
within a	00002	with the state	500.00	6000.00	Monthly	48	30/11/2020	Yes		Yes
and the second se	101010		10.00	120.00	Monthly	13	1/11/2020	Yes		Yes
Marine .	99985	Anna Street Special Solution	150.00	7800.00	Weekly	50	6/12/2020	Yes		Yes
CHER AND DRIVEN DRIVEN	19221	Address Sectors	275.00	3300.00	Monthly	16	1/11/2020	Yes		Yes
and states, support	COMP1		5000.00	5000.00	Annually	52	1/01/2021	Yes		Yes
And State and	COMP1		500.00	6000.00	Monthly	54	1/01/2021	Yes		Yes
the second s	11122	torial disease to a second second	12.00	144.00	Monthly	22	1/01/2021	Yes		Yes
state from some	COMP1		60.00	60.00	Fortnightly	56	1/01/2021	Yes		Yes
10000	114113	interfaces to the first	12.00	48.00	Quarterly	24	1/03/2021	Yes		Yes
And the same	COMP1		400.00	800.00	Half Yearly	58	1/01/2021	Yes		Yes
	00001	where such	150.01	1800.12	Monthly	60	1/02/2022	Yes		Yes
THE OWNER AND	6899		1300.00	15600.00	Monthly	62	28/01/2022	Yes		Yes

4. DocMax - Add Documents - New Auto Prefill Building Option

4.1 Auto prefill building Overview

An 'Auto prefill building' option has been added to DocMax which, when configured will attempt to match the document to a building in DocMax using keywords within the text of the document.

DocMax will first try to find the CTS number, then the Plan Number using keywords. If there are no valid keywords, DocMax will attempt to identify the building from the text in the following order and selects the first building that matches:

- ABN number
- Building address (Location 1 from Building Information)
- Email addresses that match building owner contacts
- Building Long Name and if there are no matches, Building Name

For example, if an email is added from Outlook that has an attachment with an ABN but no building name or number, DocMax will look at the ABN to see if it is in a building and pre-fill that building for you if it finds a match.

The selection can be rejected by using the 'Discard Document' option if the prefill selection is not correct. The log will record when a prefilled selection is accepted.

Supported document formats are pdf, doc, docx, xps, msg and txt.

DocMax will attempt to find the building for documents added through Outlook, Dropbox or adding documents from folder location options and will also prefill the building when using a DocMax profile if possible.

4.2 Document Keywords

The following keywords are checked to identify the CTS number:

- CTS
- C.T.S.
- Scheme

The following keywords are checked to identify the plan number:

- GTP
- G.T.P
- SP
- S.P

- Plan
- Plan No
- Scheme
- Building Number
- Building No

For example, a document that has the text '12345' will not be identified and matched as a building number unless it is accompanied with an identifying keyword such as "CTS 12345"

There can also be separator characters between the keyword and number, "Plan No-111" or "Plan No - 111" or "Plan No: 111" The ABN can have space or – separators. E.g.: "11-111-111-111-111"

Note: Only numeric characters are extracted. Buildings with alpha characters (such as Sub Groups) and GLMax companies will not be identified.

4.3 Enable / Disable Auto prefill building option

To enable the 'Auto prefill building' feature, please use the following instructions.

- 1. Navigate to DocMax
- 2. Click the arrow in the top left corner
- 3. Tick 'Auto prefill building' to enable or untick the setting to disable

PocMax - Testing 5.6 MySql						
•						
Settings	General					
	Default expiry years 7					
Open BCMax	Auto delete expired documents					
Disbursements	Frequency to update work queues in the background (minutes) Auto prefill building					
Help	Invoice					
	Auto select last expense account					
About						
Exit						

Please Note: 'Auto prefill building' is a global setting and will be set for all users. The setting will be deactivated by default and will need to be activated manually by a user with appropriate permissions.

To enable the setting, you must have access to 'Modify Configuration Settings' in security under the DocMax permissions.

Permissions For	_		×
Name renee.soderlund			
BCMax GLMax DocMax			
			^
Access to Portal Uploads			
Access to Recently Added			
- 🐼 Email a document			
- Area access to Doc Max			
Modify configuration settings			
Upload/Remove Portal documents			
View internal documents			
E. Saved Search			
±is Status			¥
Filter		Close	

Important Note: This process may select an incorrect building based of the data in the document. As such, users should do a final check prior to processing invoices etc.

What's Better

- Minor issues have been resolved when a single quote is entered into Compliance Monitor details field and saved.
- Enhancements have been made when entering new TRMax Recoveries for other operators and/or Consultants. The display list of users will no longer show users deleted from security.
- Performance improvements have been made to the 'Bank Not Reconciled' dashboard to report <u>all unreconciled buildings that have had 'Other' transactions</u>
- Minor typos have been corrected on the Disbursements module screen.
- Print Bank Slip Report when previewed and emailed will now raise a charge in TRMax.
- The Supplier Name for non-SCM banks in EFT Manager was limited to 12 characters on-screen, this has now been extended to 26 characters.