

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



Contents

What's New.....	3
1. Communication Module Enhancements.....	3
2. TaskMax – Bulk Finalise.....	5
3. Management Fees Report.....	7
4. DocMax – Add Documents – New Auto Prefill Building Option.....	11
What's Better.....	14

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

SentDate	Status	FromUser	Recipient	Subject	SentAs	Type	SendDelay/After	MessageID	Receipt	BuildingNumber
27/04/21 15:41:24	ready	Renee <renee.soderlund@stratamax.com>		Levy Notice0210000116999	TO	SMTP		1195	N	
27/04/21 15:46:30	ready	Renee <renee.soderlund@stratamax.com>		Levy Arrears Notice - A/c 02100001-1	TO	SMTP		1196	N	
27/04/21 15:52:04	ready	Renee <renee.soderlund@stratamax.com>		DocMax Document	TO	SMTP		1197	N	
27/04/21 15:52:04	ready	Renee <renee.soderlund@stratamax.com>		DocMax Document	BCC	SMTP		1197	N	
27/04/21 15:57:42	ready	Renee <renee.soderlund@stratamax.com>		16999Work Order to Contractor	TO	SMTP		1198	Y	
27/04/21 16:00:22	ready	Renee <renee.soderlund@stratamax.com>		Quotation-16999 #00000135	TO	SMTP		1199	Y	
28/04/21 09:08:53	ready	Renee <renee.soderlund@stratamax.com>			TO	SMTP		1200	N	16999
28/04/21 10:12:51	ready	Renee <renee.soderlund@stratamax.com>		TESTING PBI 159427	TO	SMTP		1202	N	16999
28/04/21 10:15:03	ready	Renee <renee.soderlund@stratamax.com>		Financials	TO	SMTP		1203	N	16999
28/04/21 10:15:03	ready	Renee <renee.soderlund@stratamax.com>		Financials	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:

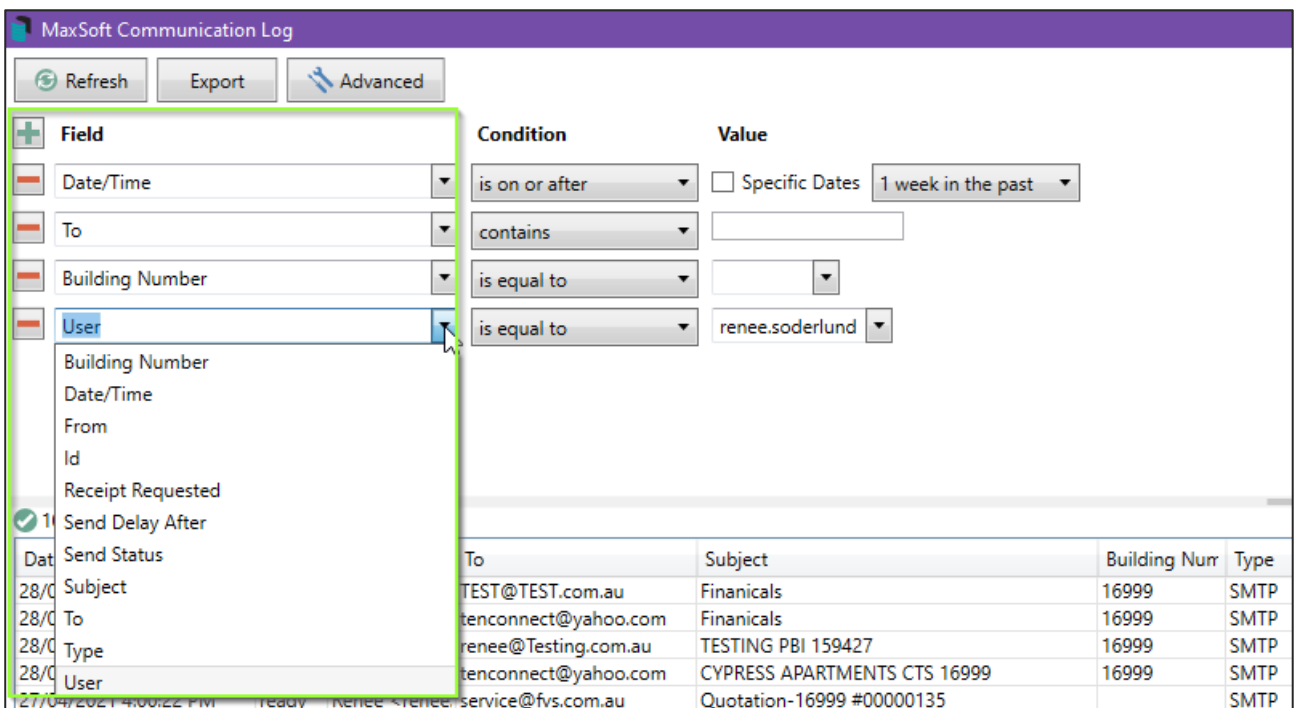
- Building Number
- Date/Time
- From
- Id
- Receipt Requested
- Send Delay After
- Send Status
- Subject
- To

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

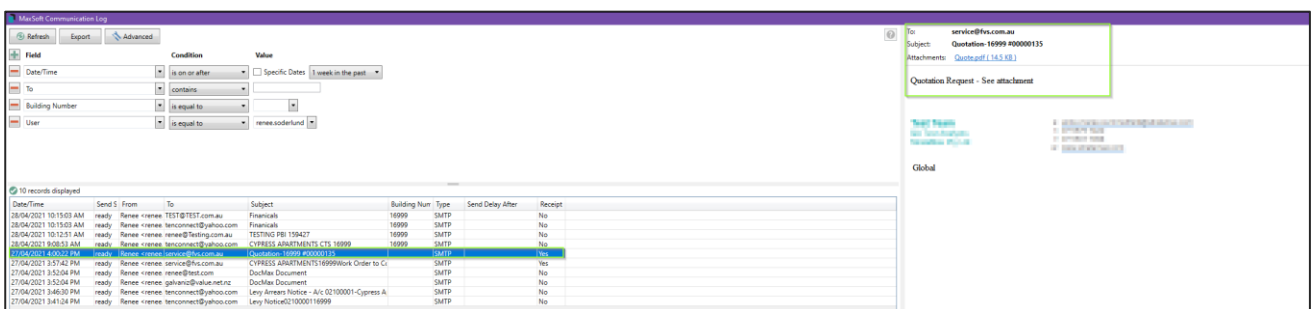
Sort Order and Display columns can also be configured.

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



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



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.

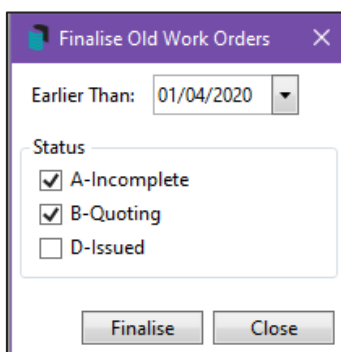
2. TaskMax – Bulk Finalise

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:

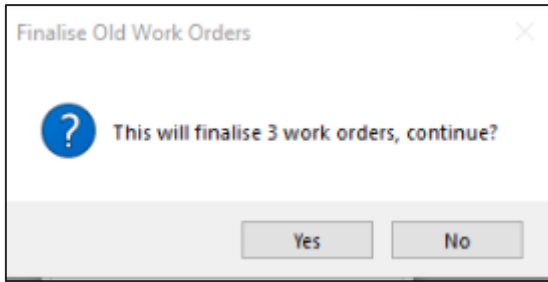
- A-Incomplete
- B-Quoting
- D-Issued

To utilise the new enhancement, follow the steps below:

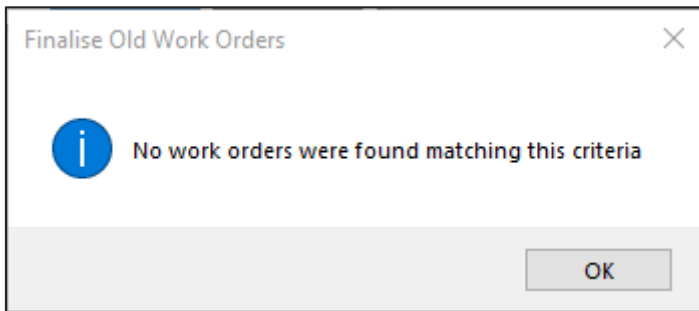
1. Navigate to 'TaskMax'
2. Click on 'Edit' menu
3. Select 'Finalise Old Work Orders'
4. New window will appear
5. Enter the date you require
6. Select the type status to finalise



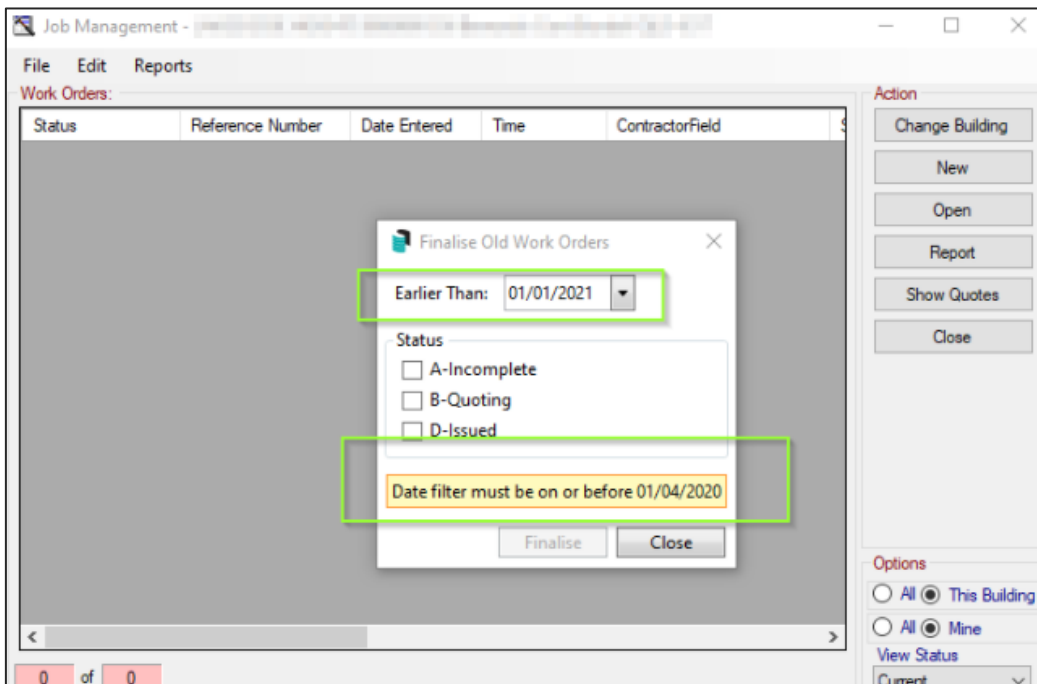
7. Click 'Finalise'
8. A message will appear advising the number of Old Work Orders that will be finalised – Select 'Yes or No'



- 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.



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.

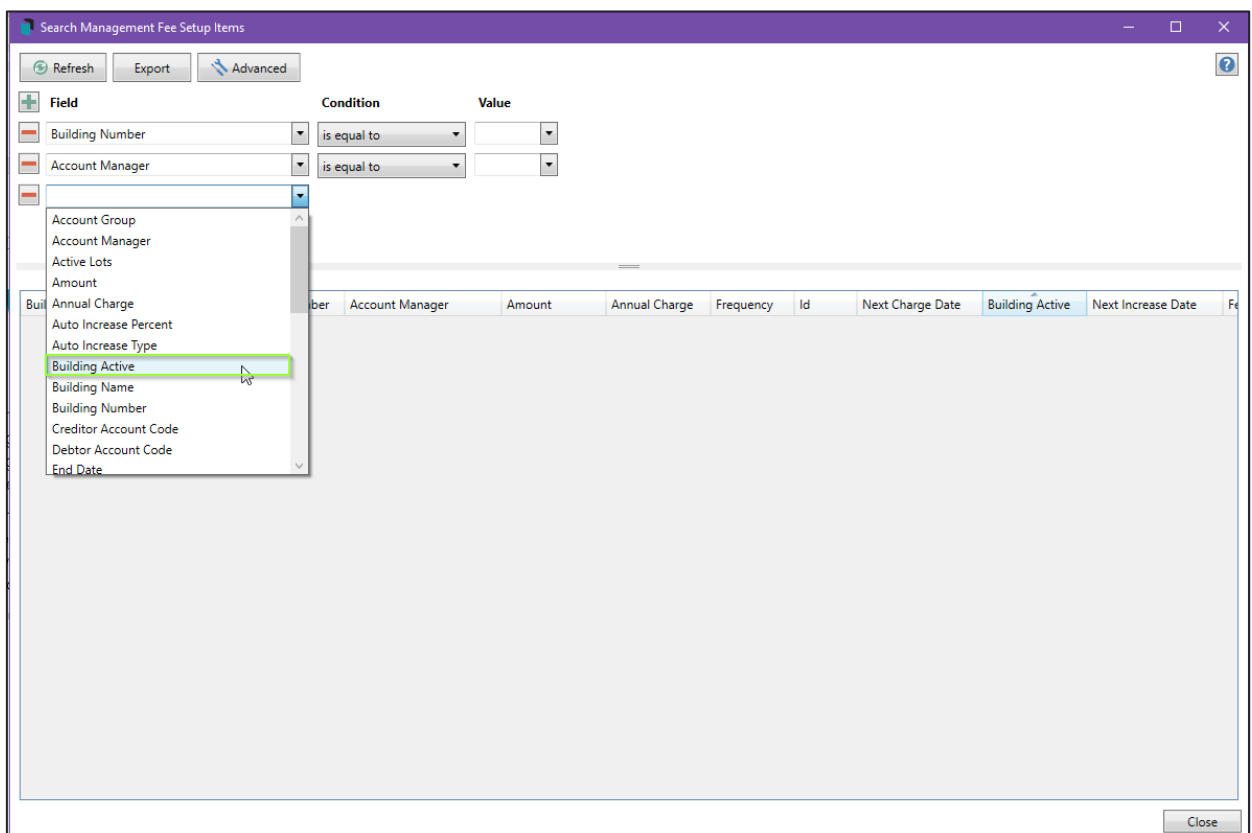
- New 'Building Active' Field criteria
- New columns available – "Building Active"
- New Sort Order added – 'Building Active'
- Change Title of Active Column to 'Fee Active'

3.1 New 'Building Active' field

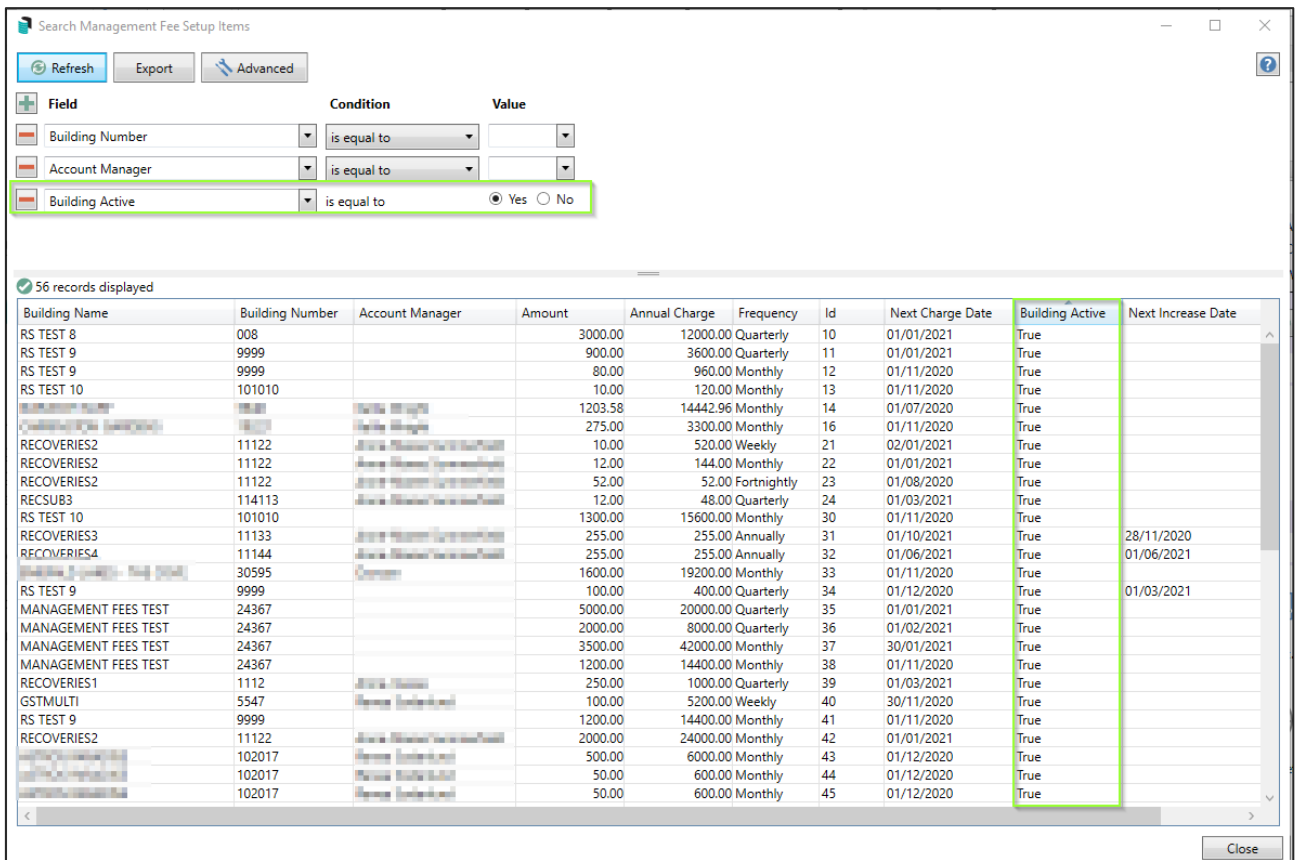
A new field has been added to the Management Fees Report Setup to allow users to search for Active or Non-Active buildings.

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'



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

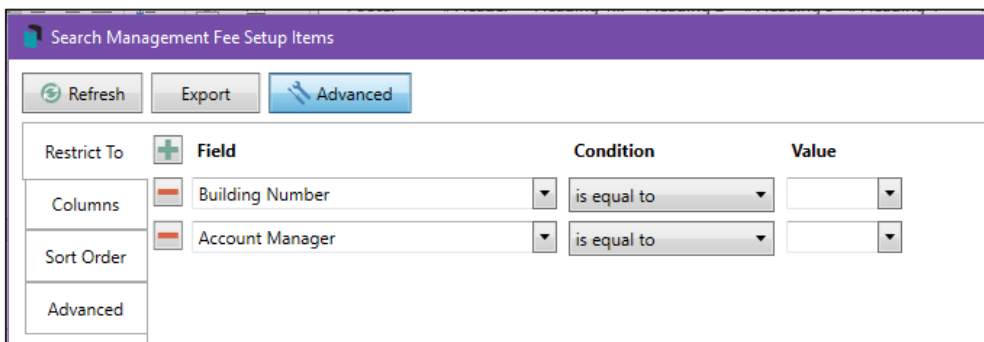


3.2 New Building Active Column and Sort Order available

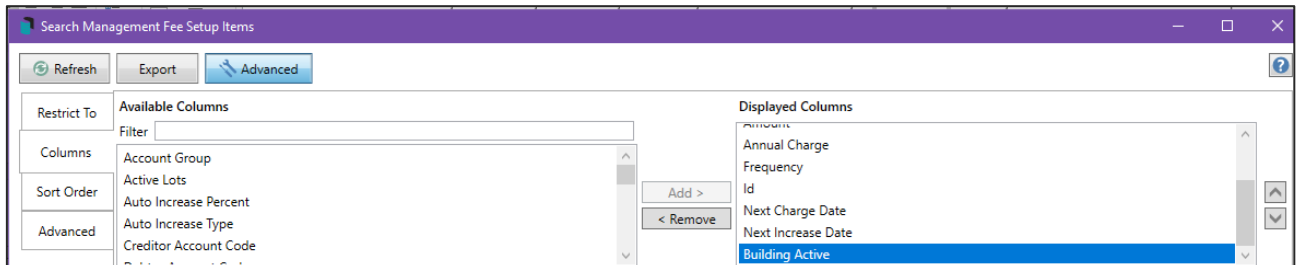
When Setting up the Management Fees report, a new column has now been made available ‘Building Active’ this will allow users to report if a building is active or not.

To setup this criterion, follow the below steps:

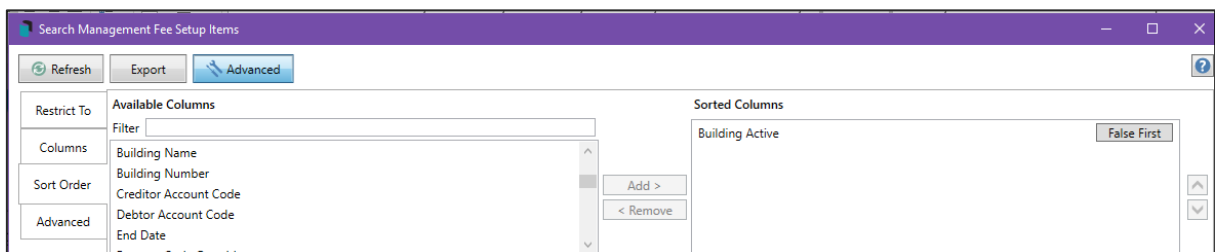
1. Navigate to ‘Management Fees Setup’
2. Set up the required Filters



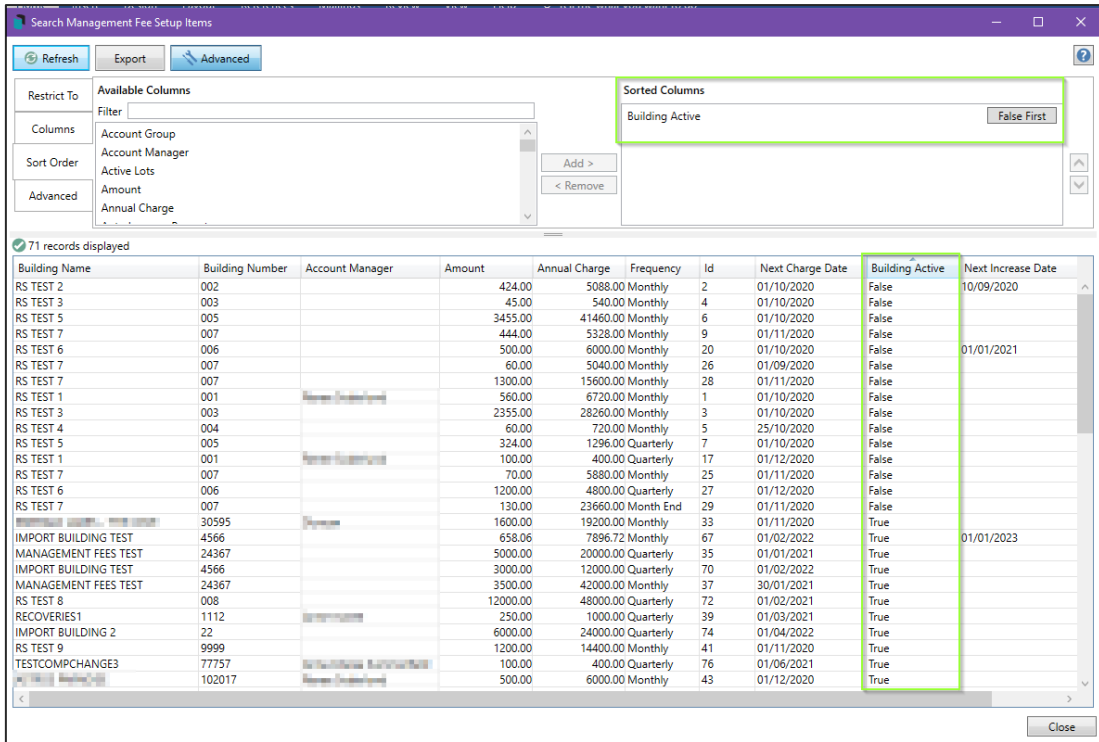
3. Select 'Advance'
4. Click 'Columns'
5. In the Available Columns – 'Building Active' will now be available
6. Highlight the column, click on add
7. This will add 'Building Active' to the display columns



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



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



- 13. Click 'Export'
- 14. Report will open in Excel showing the new reporting fields

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
IMPORT BUILDING TEST	30595	Dennis	1600.00	19200.00	Monthly	33	1/11/2020	Yes		Yes
IMPORT BUILDING TEST	4566		658.06	7896.72	Monthly	67	1/02/2022	Yes	1/01/2023	Yes
MANAGEMENT FEES TEST	24367		5000.00	20000.00	Quarterly	35	1/01/2021	Yes		Yes
IMPORT BUILDING TEST	4566		3000.00	12000.00	Quarterly	70	1/02/2022	Yes		Yes
MANAGEMENT FEES TEST	24367		3500.00	42000.00	Monthly	37	30/01/2021	Yes		Yes
RS TEST 8	008		12000.00	48000.00	Quarterly	72	01/02/2021	Yes		Yes
RECOVERIES1	1112	Barbara	250.00	1000.00	Quarterly	39	01/03/2021	Yes		Yes
IMPORT BUILDING 2	22		6000.00	24000.00	Quarterly	74	01/04/2022	Yes		Yes
RS TEST 9	9999		1200.00	14400.00	Monthly	41	01/11/2020	Yes		Yes
TESTCOMPCHANGE3	77757	Barbara Soderlund	100.00	400.00	Quarterly	76	01/06/2021	Yes		Yes
TESTCOMPCHANGE3	102017	Renee Soderlund	500.00	6000.00	Monthly	43	1/12/2020	Yes		Yes
TESTCOMPCHANGE3	102017	Barbara Soderlund	50.00	600.00	Monthly	45	1/12/2020	Yes		Yes
TESTCOMPCHANGE3	9999		900.00	3600.00	Quarterly	11	1/01/2021	Yes		Yes
TESTCOMPCHANGE3	00002		500.00	6000.00	Monthly	48	30/11/2020	Yes		Yes
TESTCOMPCHANGE3	101010		10.00	120.00	Monthly	13	1/11/2020	Yes		Yes
TESTCOMPCHANGE3	99985	Barbara Soderlund	150.00	7800.00	Weekly	50	6/12/2020	Yes		Yes
TESTCOMPCHANGE3	19221	Barbara Soderlund	275.00	3300.00	Monthly	16	1/11/2020	Yes		Yes
TESTCOMPCHANGE3	COMP1		5000.00	5000.00	Annually	52	1/01/2021	Yes		Yes
TESTCOMPCHANGE3	COMP1		500.00	6000.00	Monthly	54	1/01/2021	Yes		Yes
TESTCOMPCHANGE3	11122	Barbara Soderlund	12.00	144.00	Monthly	22	1/01/2021	Yes		Yes
TESTCOMPCHANGE3	COMP1		60.00	60.00	Fortnightly	56	1/01/2021	Yes		Yes
TESTCOMPCHANGE3	114113	Barbara Soderlund	12.00	48.00	Quarterly	24	1/03/2021	Yes		Yes
TESTCOMPCHANGE3	COMP1		400.00	800.00	Half Yearly	58	1/01/2021	Yes		Yes
TESTCOMPCHANGE3	00001		150.01	1800.12	Monthly	60	1/02/2022	Yes		Yes
TESTCOMPCHANGE3	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"

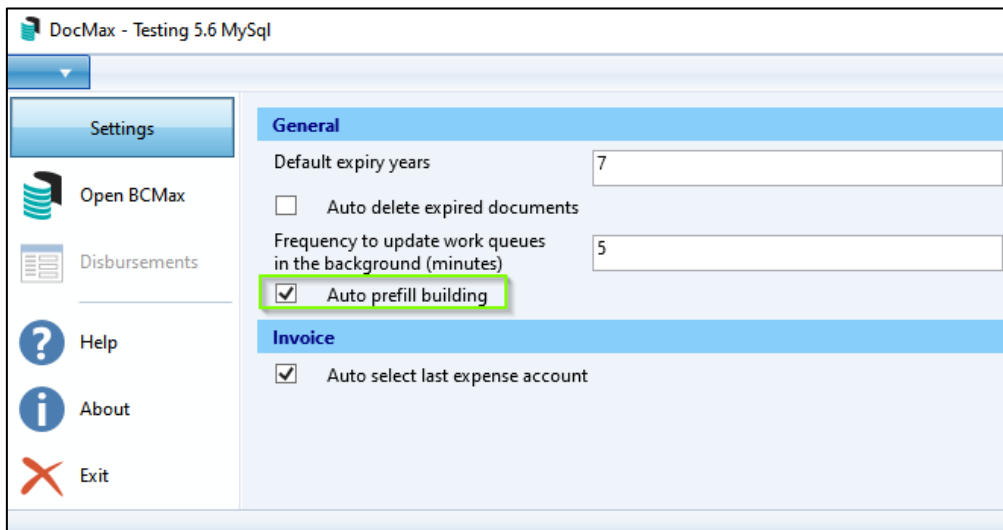
There can also be separator characters between the keyword and number, "Plan No-111" or "Plan No - 111" or "Plan No: 111" The ABN can have space or – separators. E.g.: "11-111-111-111"

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

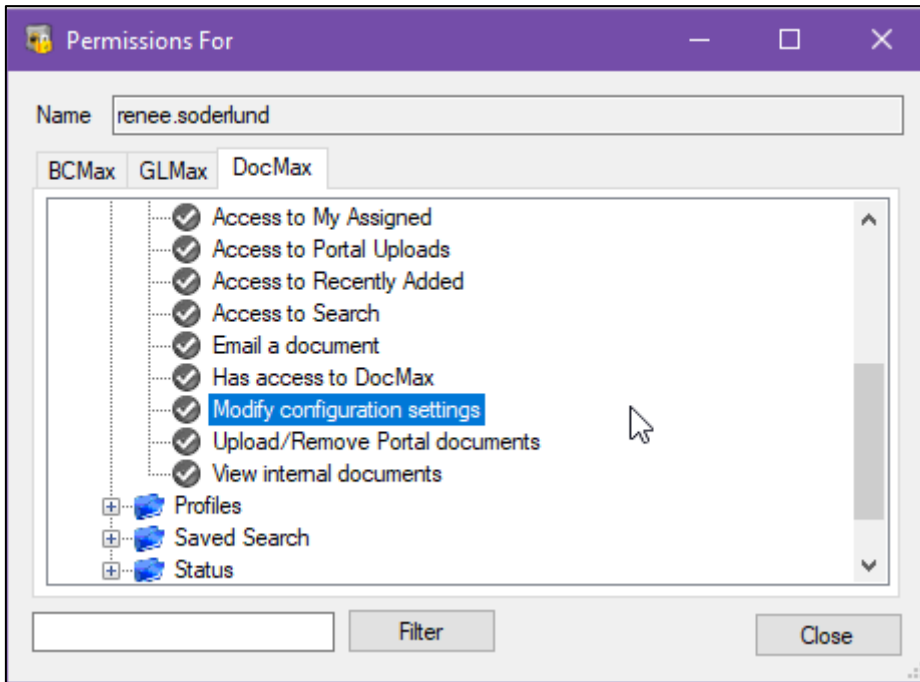
To enable the 'Auto prefill building' feature, please use the following instructions.

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



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.



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 all unreconciled buildings that have had 'Other' transactions
- 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.