Release Notes – Version 5.6.42

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

StrataMax StrataCash TRATAPAY

What's New 3
1. Process Recoveries – Preview Summaries 3
1.1 Previewing 'By Building' for selected invoice codes 3
1.2 Previewing 'By Recovery Type' for selected invoice codes 4
1.3 Previewing 'By Account Manager' for selected invoice codes 6
2. BCMax Email Server – notification for failed email 8
3. Office Bearers Report – Lot Fields 9
3.1 Office Bearer Report 9
What's Better 11

What's New

1. Process Recoveries – Preview Summaries

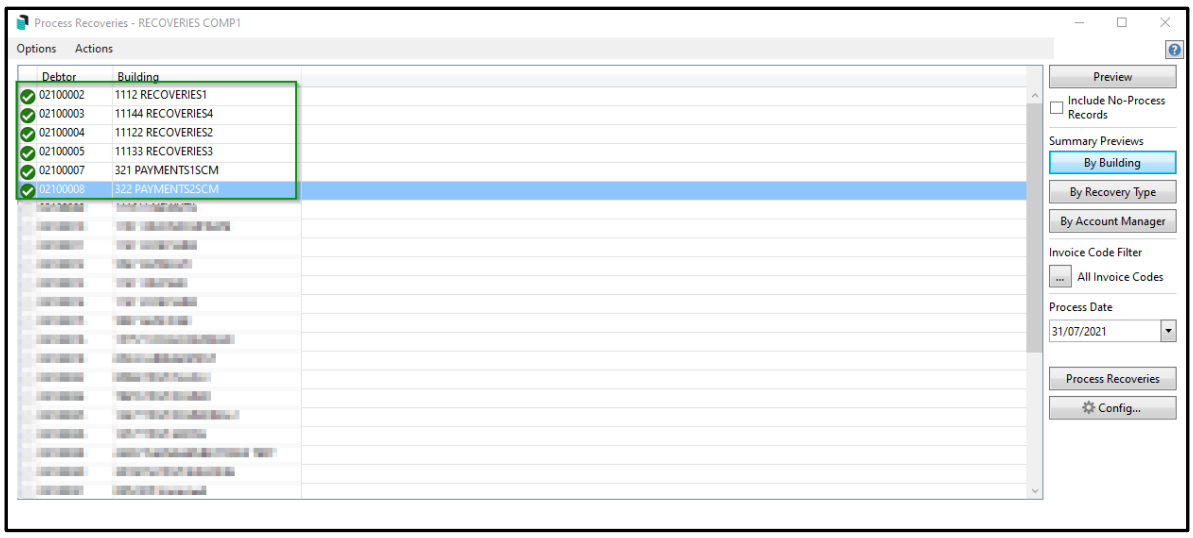
We have added the ability to preview unprocessed recoveries with different Summary previews now available:

- By Building
- By Recovery Type
- By Account Manager
- Preview (which will report all recoveries ready for processing)

1.1 Previewing 'By Building' for selected invoice codes

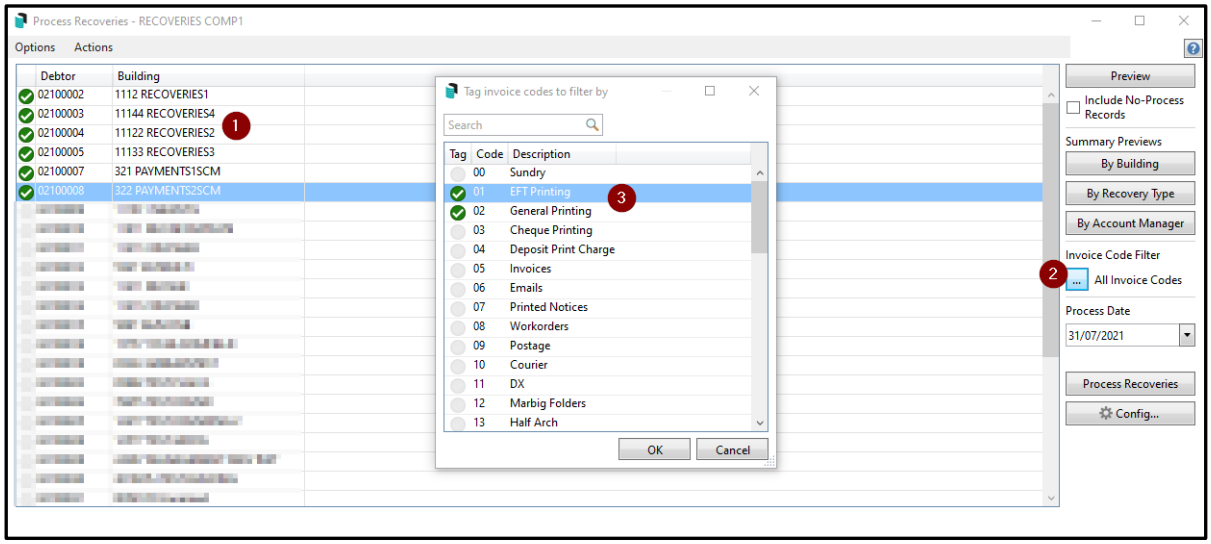
To preview recoveries that are ready to be processed 'By Building' only is now available for all or selected Invoice Codes. Follow the steps below to generate the preview:

1. Navigate to a GLMax company
2. Click on 'Process Recoveries' module
3. The Process Recoveries screen will open – which no buildings selected
4. Select a single, multiple or all buildings to report

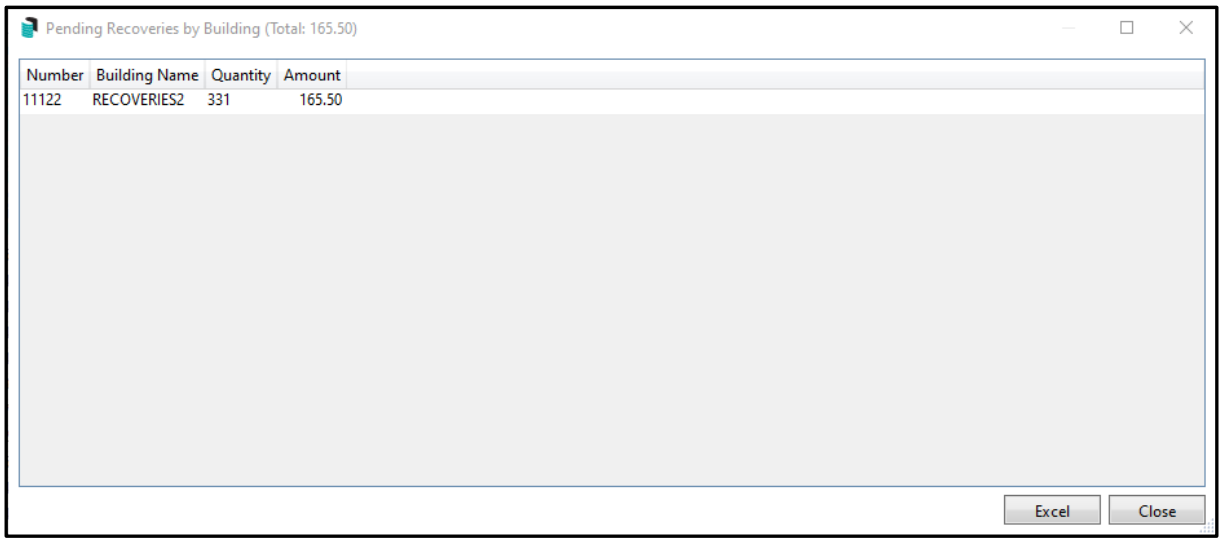


5. Click on 'Invoice Code Filter' If you wish to only select a subset of Invoice Codes to report

6. Select Invoice Codes that need reporting



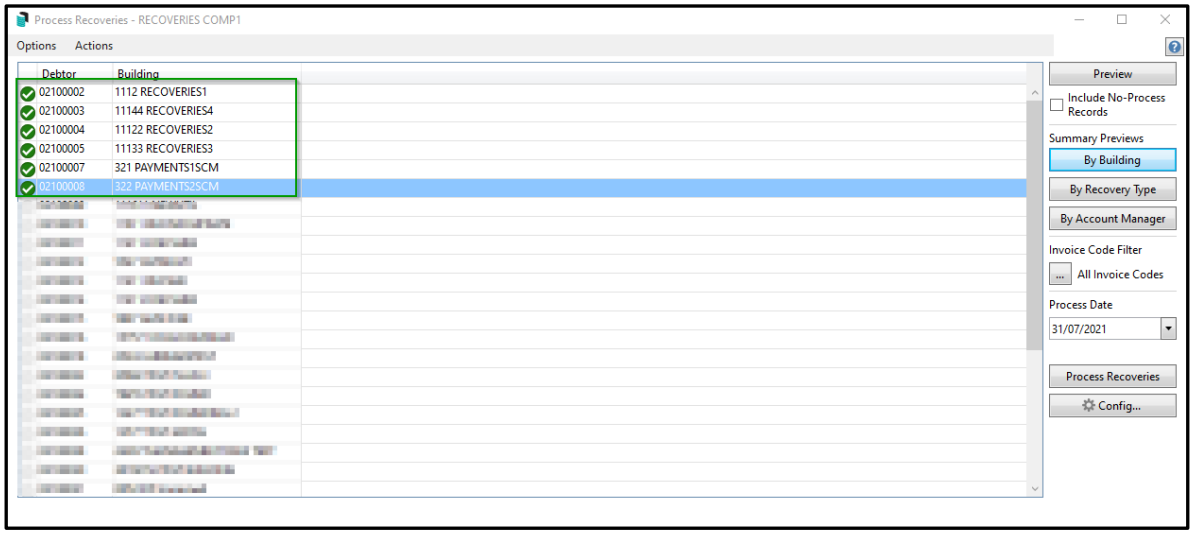
7. Click 'Ok'
8. Select 'By Building'
9. This will return all pending recoveries by building type for selected invoices which can be exported to Excel



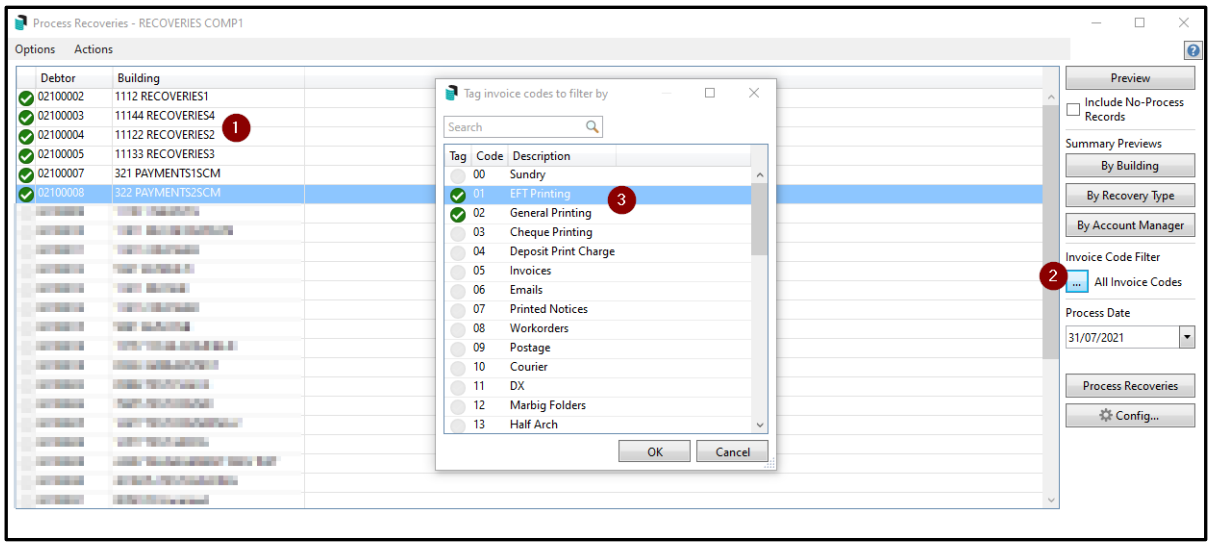
1.2 Previewing 'By Recovery Type' for selected invoice codes

To preview recoveries that are ready to be processed 'By Recovery Type' is now available for all or selected Invoice Codes. Follow the below steps to generate the preview:

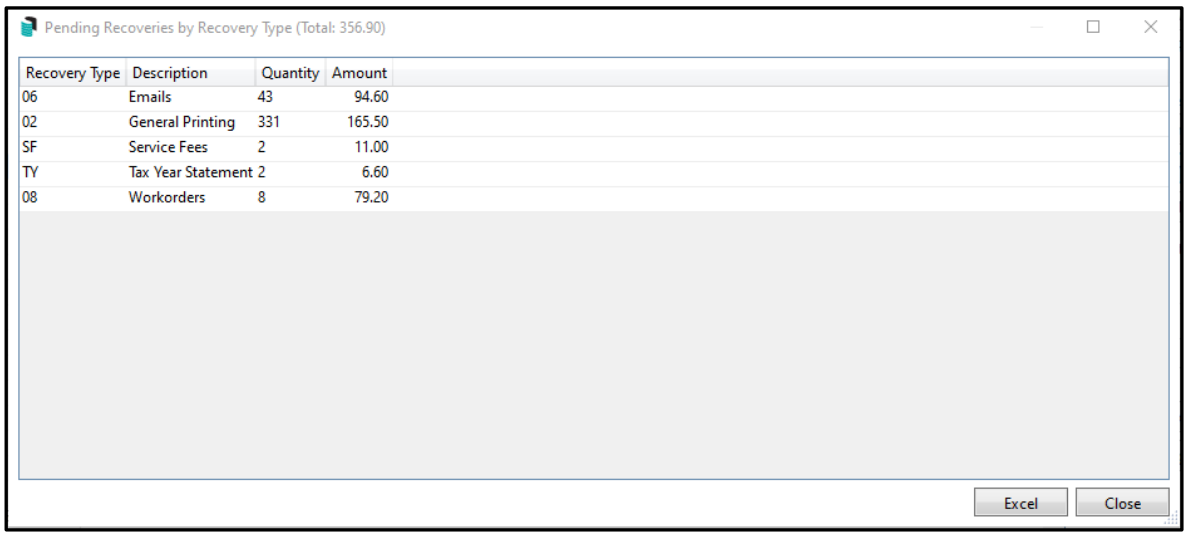
1. Navigate to a GLMax company
2. Click on 'Process Recoveries' module
3. The Process Recoveries screen will open – with no buildings selected
4. Select a single building, multiple or all buildings to report



5. Click on 'Invoice Code Filter' If you wish to only select a subset of Invoice Codes to report
6. A list of available Invoice codes will appear that can be tagged for reporting



7. Click 'Ok'
8. Select 'By Recovery Type'
9. Pending recoveries by 'Recovery Type' for selected buildings will appear on screen



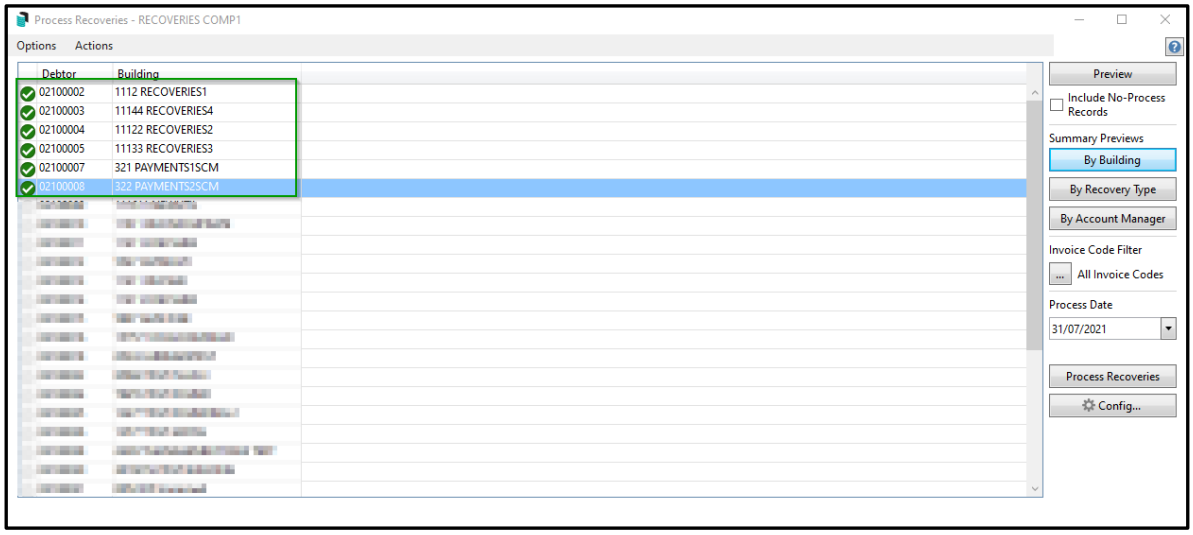
10. Click on 'Excel' to report and print

Recovery Type	Description	Quantity	Amount
06	Emails	43	94.60
02	General Printing	331	165.50
SF	Service Fees	2	11.00
TY	Tax Year Statement	2	6.60
08	Workorders	8	79.20

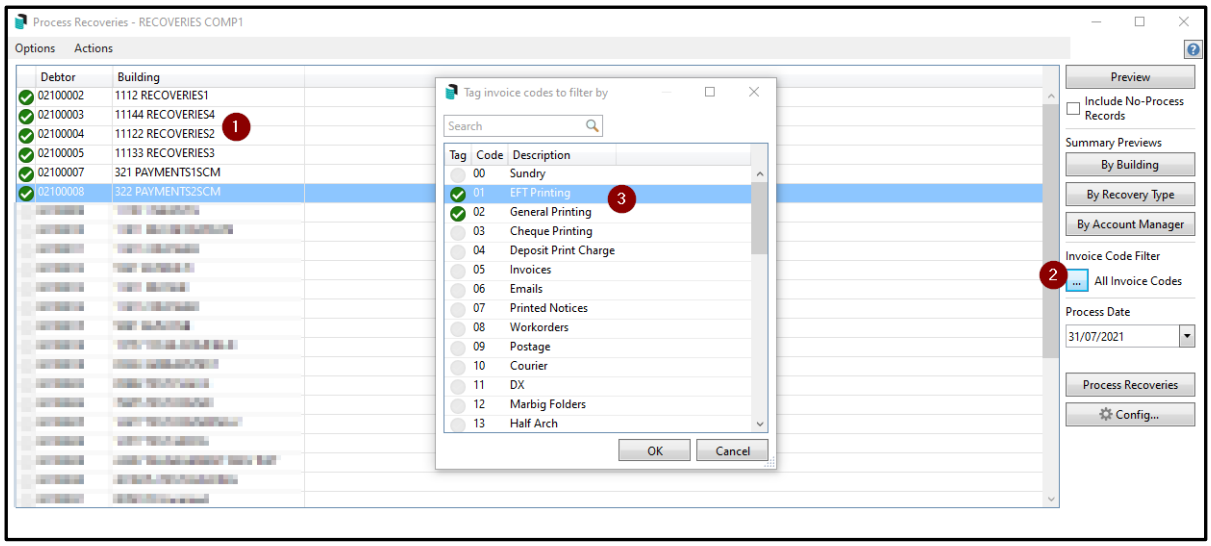
1.3 Previewing 'By Account Manager' for selected invoice codes

To Preview recoveries that are ready to be processed 'By Account Manager' only is now available for all or selected Invoice Codes. Follow the below steps to generate the preview:

1. Navigate to a GLMax Company
2. Click on 'Process Recoveries' module
3. The Process Recoveries screen will open – which no buildings selected
4. Select a single building, multiple buildings or all buildings to report

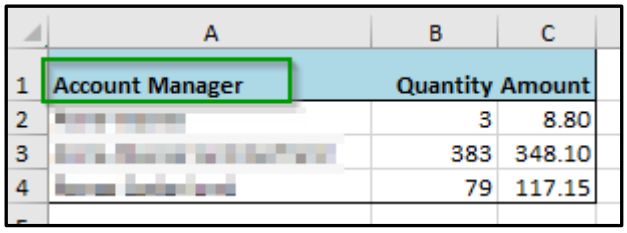


5. Click on 'Invoice Code Filter' If you wish to only select a subset of Invoice Codes to report
6. List of available Invoice codes will appear that can be tagged for reporting



7. Click 'Ok'
8. Click 'By Account Manager'
9. Pending recoveries 'By Account Manager' for selected buildings will appear on screen

10. Click on 'Excel' to report and print

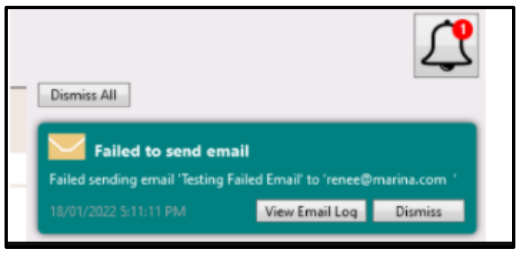


Please Note: To report all invoice codes for any of the Summary Previews now available, 'Invoice Code Filter' does not need to be selected as default is 'All Invoice Codes'.

2. BCMax Email Server – notification for failed email

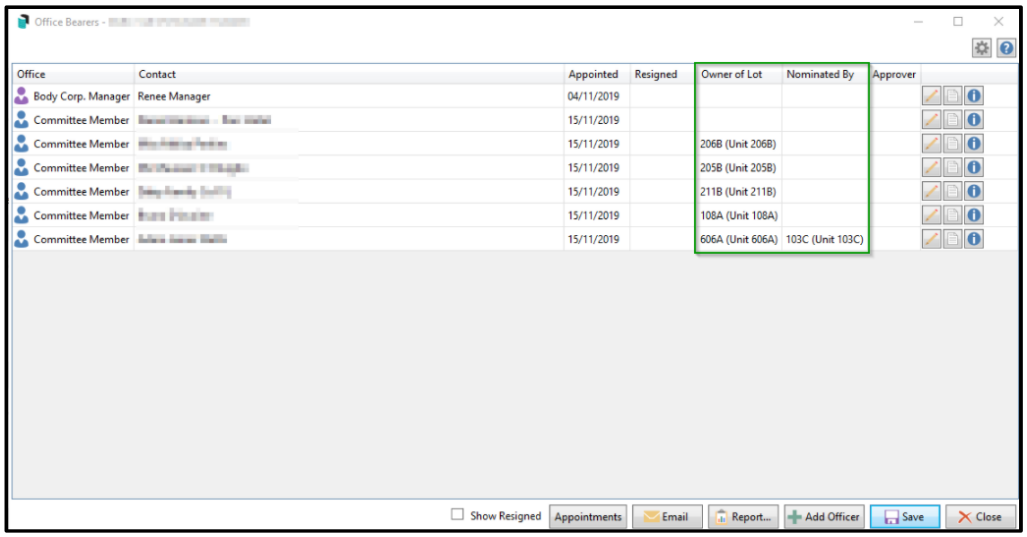
Notifications will now be sent to the sender of failed emails.

If an email is sent via MaxSoft Communications and fails to send, a BCMax notification will appear on the desktop of BCMax. Example below of the notification :



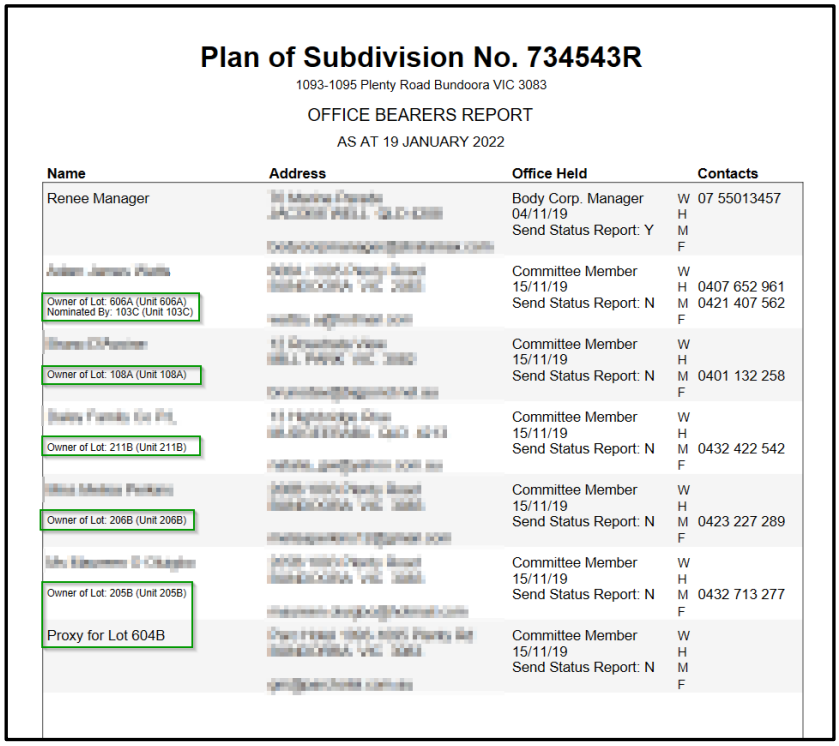
3. Office Bearers Report – Lot Fields

The new Office Bearer module has been enhanced to display the Lot number and Unit number for Owner of Lot and Nominated By fields, example shown below:



3.1 Office Bearer Report

Office Bearer Report has been enhanced to replace account numbers with Lot and Unit Numbers for Owner of Lot and Nominated By fields if the template selected reports the Nominated By field. See Example below:



Plan of Subdivision No. 734543R

1093-1095 Plenty Road Bundoora VIC 3083

OFFICE BEARERS REPORT

AS AT 19 JANUARY 2022

Name	Address	Office Held	Contacts
Renee Manager	[redacted]	Body Corp. Manager 04/11/19 Send Status Report: Y	W 07 55013457 H M F
[redacted] Owner of Lot: 606A (Unit 606A) Nominated By: 103C (Unit 103C)	[redacted]	Committee Member 15/11/19 Send Status Report: N	W H 0407 652 961 M 0421 407 562 F
[redacted] Owner of Lot: 108A (Unit 108A)	[redacted]	Committee Member 15/11/19 Send Status Report: N	W H M 0401 132 258 F
[redacted] Owner of Lot: 211B (Unit 211B)	[redacted]	Committee Member 15/11/19 Send Status Report: N	W H M 0432 422 542 F
[redacted] Owner of Lot: 206B (Unit 206B)	[redacted]	Committee Member 15/11/19 Send Status Report: N	W H M 0423 227 289 F
[redacted] Owner of Lot: 205B (Unit 205B)	[redacted]	Committee Member 15/11/19 Send Status Report: N	W H M 0432 713 277 F
Proxy for Lot 604B	[redacted]	Committee Member 15/11/19 Send Status Report: N	W H M F

What's Better

- Issues have been resolved around documents pending upload ignoring the filter by building
- Error has been corrected when adding dashboard item 'ActiveLotsWonLost' and moving over into GLMax
- The new Office Bearers setup module allows a user to update the resignation date of an office bearer, however if the resigned office bearer is an invoice hub approver, the system was not removing from the default approvers lists and resigned from Invoice Hub (Portal) this has now been resolved.
- Levy Management - When receipts are posted through the bank the Levy Management /Configuration 'Don't Show Generated Levies on the Balance Sheet for Specific Building' setting was being ignored. This has now been resolved.