Release Notes – Version 5.6.59

StrataMax has been dedicated to meeting the needs of Strata Managers for over 30 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. DocMax – Merge Fields

We have created the ability to use Merge Fields for DocMax Title, Description & Notes fields and allow these to be applied on profiles and action buttons of work queues.

Specific fields that can be included are:

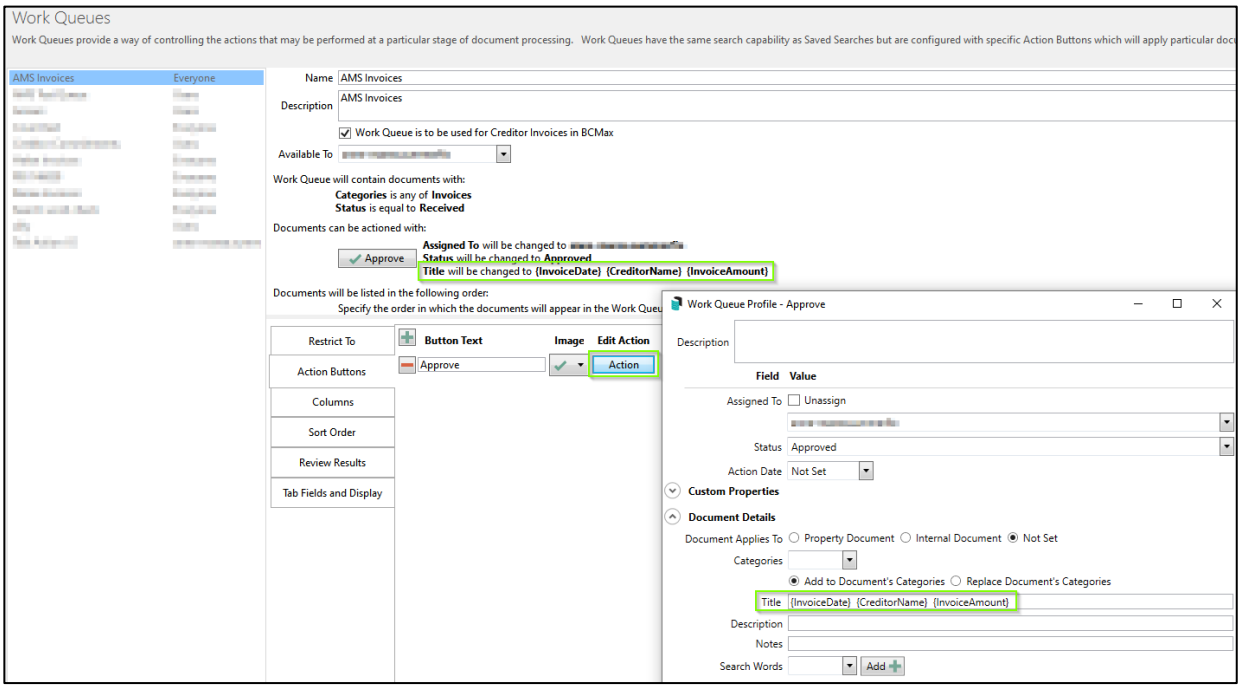
- Building Name / Company Title - {BuildingName}
- Financial Year Start - {FinancialYearStart}
- Financial Year End - {FinancialYearEnd}
- Creditor Name - {CreditorName}
- Invoice Number - {InvoiceNumber}
- Invoice Amount - {InvoiceAmount}
- Invoice Date - {InvoiceDate}
- Today - computer date - {Today}
- Current Username - {CurrentUser}
- Action Date - {ActionDate}

If these fields are set up in a profile or work queue, the data will be populated in DocMax when the document profile is applied or when the action button is used in a Work Queue. To use the fields, add or edit a profile or work queue using the following steps:

1.1 Add or Edit a Work queue

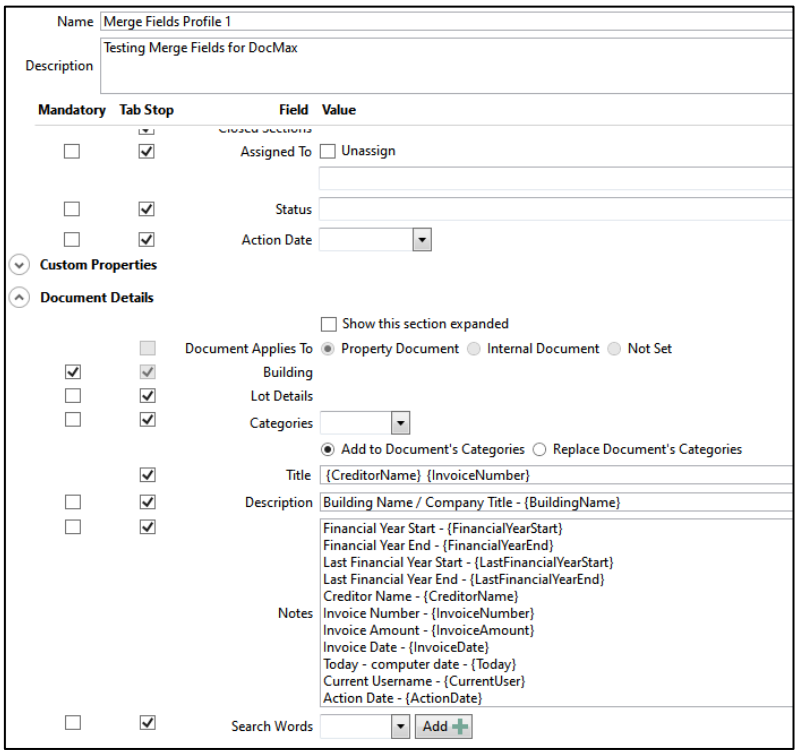
1. Navigate to DocMax Administration
2. Click Work Queues
3. Select the Work Queue you would like to add the fields to and click Edit
4. Alternatively, click 'Add New'
5. Select 'Action'
6. Edit Action
7. Add the Merge Field as displayed above using {} to the required field - Felds can be added to Title, Description or Notes sections only.
8. Click Save Changes

For example, to set Invoices to add the Creditor and Invoice details to the title, edit the Invoice work queue action to add the fields.

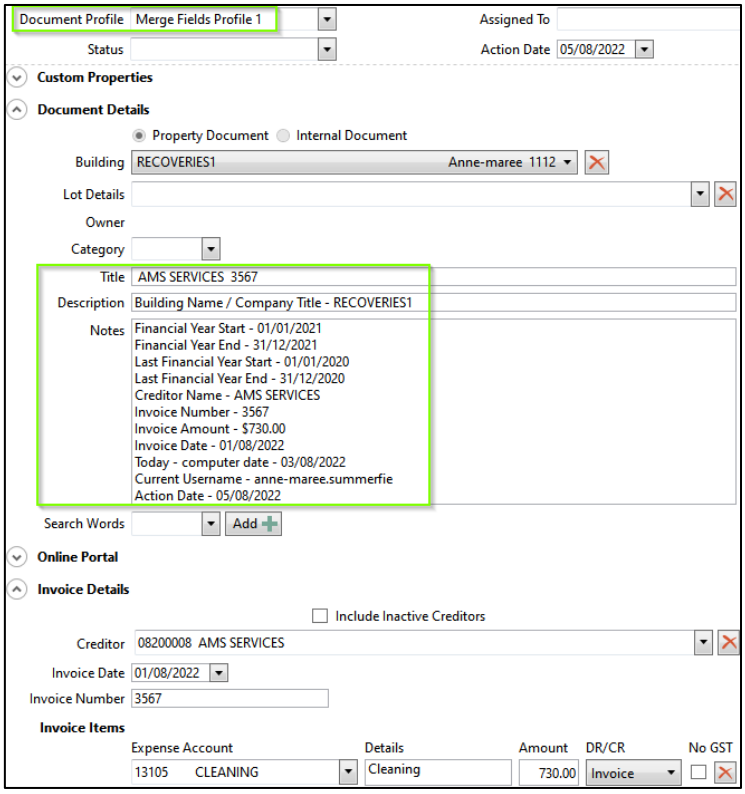


1.2 Add or Edit a Profile:

1. Navigate to DocMax Administration
2. Click Profiles
3. Select the profile you would like to add the fields to and click Edit
4. Alternatively, click 'Add New'
5. Add the Merge Field as displayed above using {} - Felds can be added to Title, Description or Notes sections only.
6. Click Save Changes



When the profile is applied to added documents, the data will be populated into the DocMax record in the selected sections:



Please Note: For building specific merge fields to populate, the building must be selected prior to selecting the profile.

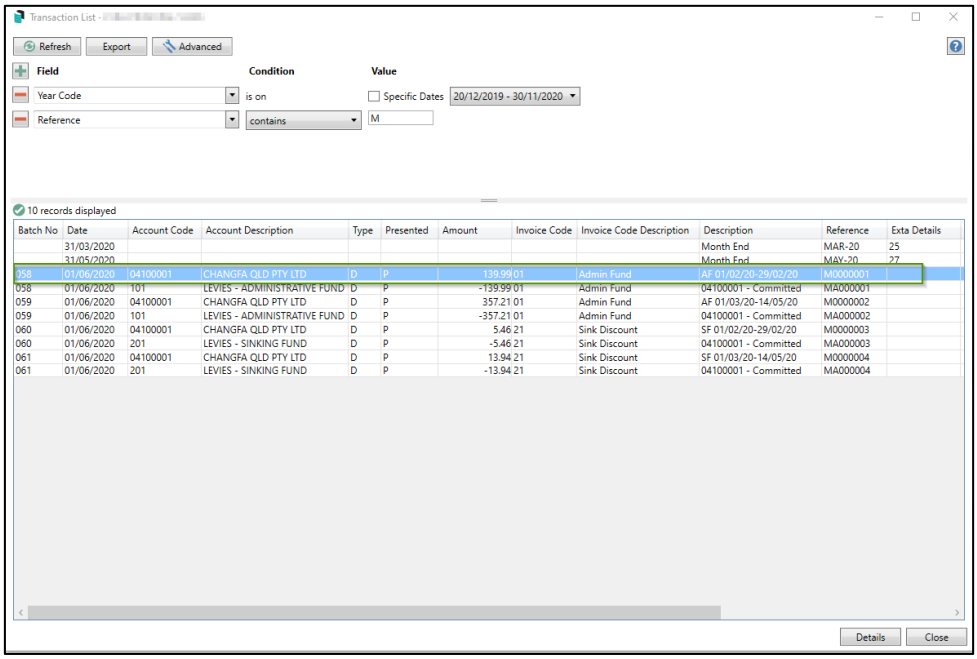
2. Edit Invoice Transaction Details – Debtor Transactions

Transaction descriptions can now be edited for debtor transaction with references that start with M0.

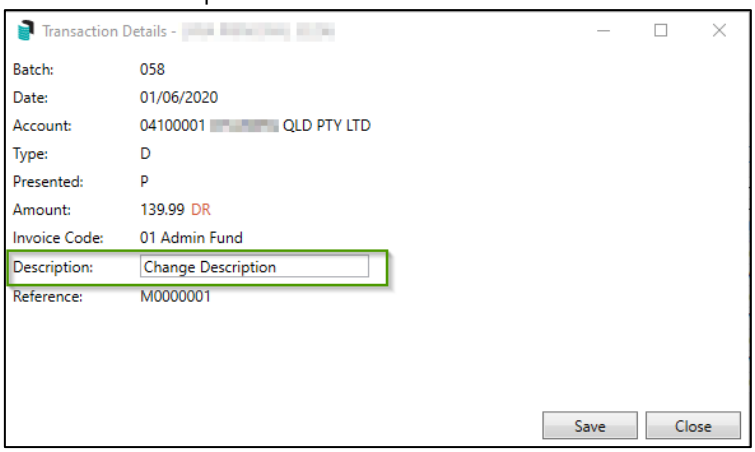
Please Note: this does not include transactions with reference MA

To access this new feature, follow the steps below:

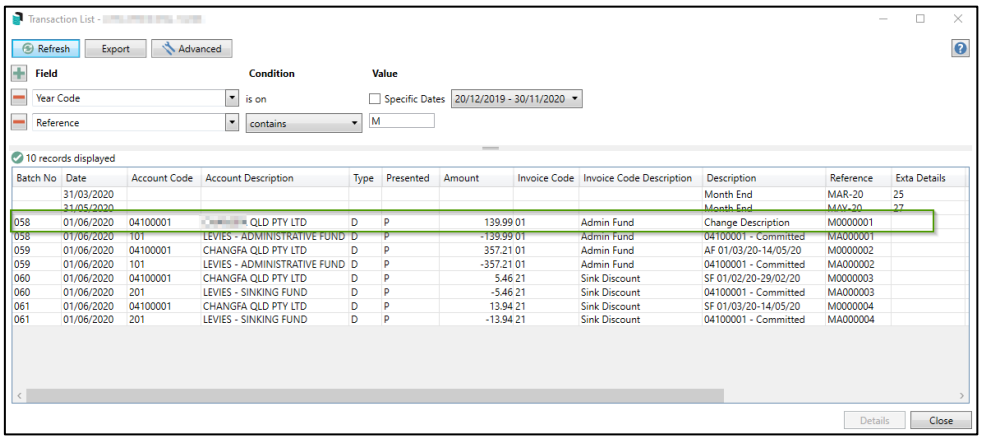
1. Navigate to 'Search Transactions'
2. Highlight a Transaction you wish to edit e.g. M0 transaction



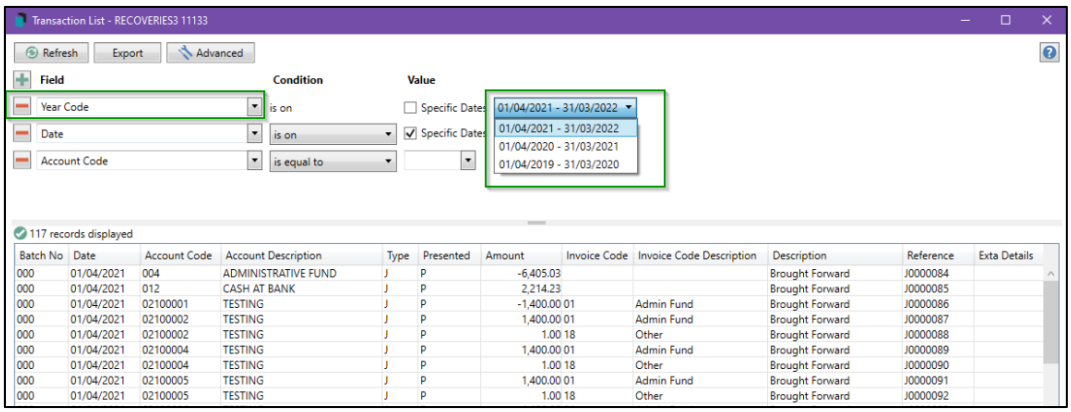
3. Click 'Details'
4. Edit 'Description' text



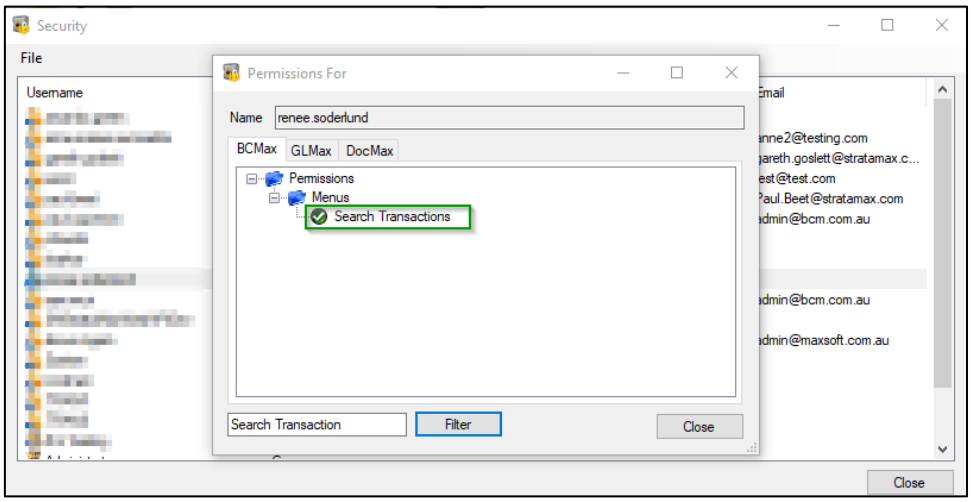
5. Click on 'Save'
6. Click 'Refresh' to reflect the description edit in the Transaction Search list



Transaction details can be edited for any financial year from 'Search Transactions' by using the search criteria 'Year Code'



To set user permissions to 'Search Transactions', navigate to security, use the filter to find 'Search Transactions' and right click to set the appropriate permissions.



Please Note: If users don't have 'Transaction Entry edit reverse' permissions the description cannot be edited.

3. South Australia – Presiding Officer, Secretary and Treasurer

Enhancements have been made to BCMax to update the office held for presiding officer to be classified as a chairperson. This change will allow committee elections for presiding officer, secretary, treasurer and ordinary members in meeting hub for South Australia in the upcoming Online voting release.

What's Better

- When exporting out of DocMax, stored report files were not translated to PDF correctly. This has now been resolved
- Historical invoice codes can NO longer be deleted if they have been used in ANY year Transactions and if any invoice codes have been deleted in prior versions to 5.6.59 then Levy Code Setup will now return validation and users must enter the Levy Codes used historic years to be put back in.
- Legal Action Report to Excel notes column was being truncated. This is now resolved and all notes will now show in full on the excel report
- When modifying large (50+) documents in one go, there was a high chance of database timeouts. This has now been enhanced to refresh the entire search instead of refreshing each document individually.
- Meeting Hub merge fields were showing resigned office bearers, this has now been resolved and the resigned positions will now be ignored.
- Resubdivide / Reallocate / Add New Lots crash where multiple contacts were selected has been resolved.