

Release Notes – Version 5.6.77

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. NSW Strata Hub – Strata Hub AGM Meeting Dashboard Report

NSW Legislation requires data to be uploaded into Strata Hub within 3 months of an AGM. Clients need to ensure this is met or else fines apply. To make it easier for clients to determine which buildings have not updated this data, we have added a Dashboard tile to show buildings where reporting has exceeded the configured threshold since last AGM Date.

To access and add the new item click the Dashboard configuration icon, click 'Add Dashboard Item', scroll to Strata Hub AGM Report and click OK. The report configuration screen will open and from this screen, the following can be configured:

- The Display Title of the Report can be modified
- The Number of Days to be reported can be configured (this defaults to 90 days to meet NSW legislative requirements)
- Buildings can be filtered by All Active, My buildings (Account Manager), Current Building or Management Office
- Tile can be set to 'Display on Desktop'
- Display type parameters can also be configured

The screenshot shows the 'Dashboard Configuration' window for the 'Strata Hub AGM Report'. The window is titled 'Dashboard Configuration' and has a close button in the top right corner. The configuration is organized into several sections:

- Report:** A dropdown menu showing 'Strata Hub Agm Report'.
- Display Title:** A text input field containing 'Strata Hub Agm Report'.
- Strata Hub AGM Report:**
 - Number of days not reported:** A text input field with the value '90'.
 - Filter Buildings:** A dropdown menu with 'Current Building' selected.
 - Management Office Filter Buildings Value:** A dropdown menu with 'All Active Buildings' selected.
- Display Type:** A dropdown menu with 'Traffic Light' selected.
- Show On Desktop:** A checked checkbox.
- Lower Limit Value:** A text input field with the value '30'.
- Upper Limit Value:** A text input field with the value '45'.

Below the configuration fields, there is a preview section titled 'Preview' showing three icons: a green checkmark, a yellow warning triangle, and a red exclamation mark. A 'Save' button is located at the bottom right of the window.

Click Save once configured and the report tile will show on the desktop if ticked. Click the tile to drill in to data:

Buildings that have an AGM meeting date that exceeds the configured no of days will be displayed to in red, buildings that fall between the configured no. of days will display in yellow and buildings that require no action will display in white to easily determine which ones need to be reviewed.

Building Number	Building Name	Last Reported	Last AGM
80570	VILLA CAPRELA	26/03/23	
549333	AM NSW	15/02/23	
55000	WILSON RD - 15 - 17 KEEP	31/05/22	

Please refer to the Help File [Dashboard](#) for more information regarding configuring Dashboard Report items.

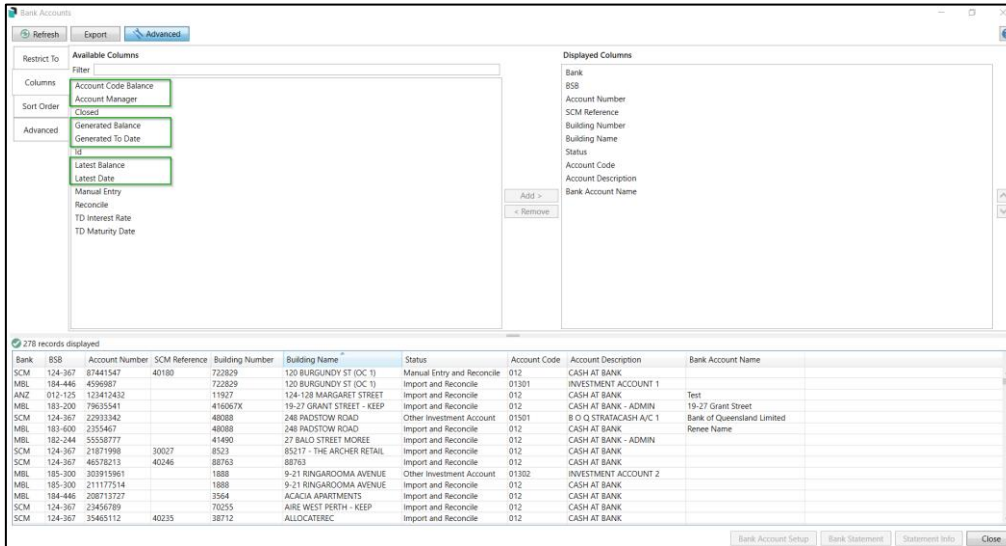
2. All Bank Accounts – New Columns available

Enhancements have been made to ‘All Bank Accounts’. New columns have been added which will allow users to export more information in relation to Account Balances for example. The columns that have been added are:

- Account Code Balance
- Account Manager
- Latest Date – latest from statement information
- Latest Balance – latest from statement information
- Generated Date – latest from processed statement information
- Generated Date – latest from processed statement information

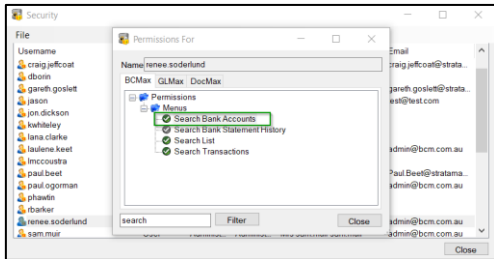
To generate a report using these new columns, follow the below steps:

1. Navigate to ‘Bank Account Setup’
2. Click on ‘All Bank Accounts’ (please note - permissions required to access)
3. Click on ‘Advance’ option
4. Click on ‘Columns’
5. Add the new fields to report



3. New Security permission – All Bank Accounts

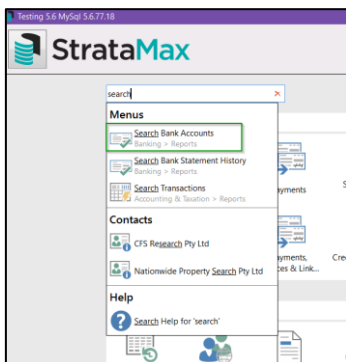
New Security permission 'Search Bank Accounts' has been added to permissions for access to 'All Bank Accounts' in Bank Account Setup.



4. New menu – Search Bank Accounts

A new menu item has been added 'Search Bank Accounts'. This option when launched will display the same information as 'All Bank Accounts' option in Bank Account Setup to allow users to view and report only.

Please note: The above permission 'Search Bank Accounts' is required to access this menu.

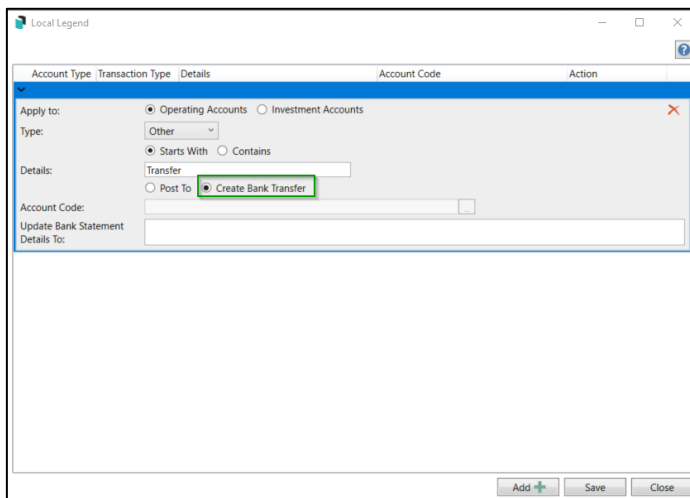


5. Bank Rec – Automate Create Bank Transfers

Enhancements have been made to allow users to define a legend that would help identify potential transfer between accounts and process them automatically.

To setup the legend, follow the below steps:

1. Navigate to 'Bank Reconciliation'
2. Click on 'Global or Local Legend' option
3. Click 'Add'
4. Select 'Operating Fund'
5. Enter Details
6. Select 'Create Bank Transfer'



7. Click 'Save'

Please Note: Some fields in the legend template do not have to be completed if 'Create Bank Transfer' is selected

The Transactions in the bank reconciliations for Operating Fund and Investment Fund need to match the legend on the Operating Account. The process will not look at the description on the investment account, but the transaction type has to be Other, Interest or Deposit

What's Better

- Utility Bills – Arrears Notices – GST was not being added to Arrears Fees if the Main Building is registered with GST.
- Base Building – GST Setup will no longer crash when opening
- Buildings API queries – Account Manager Assistant field data will now be retrieved when the "buildings/info" and "buildings/meeting-info" queries are called, Quorum Percent and Quorum Special Resolution Date fields have been added to the "buildings/meeting-info" query.
- Global Reports – Owner Extract – long Car Space numbers generated a value violates the MaxLength error. This has been resolved.
- Roll – BSB Lookup is filling Bank Account Branch but if details are too long a crash occurs. This has been resolved.
- TaskMax – We have removed the minimum date validation to the 'Finalise Old Work Orders' function in TaskMax. Please Note: If no date is entered the system will return a validation message.
- Bank Account Setup – Validation was not preventing Save without Account code. This has now been resolved.