

Release Notes – Version 5.6.84

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



What’s New..... 3

1. Management Fees Setup..... 3

 1.1 *New Columns added*..... 3

 1.2 *Management Setup Report*..... 3

2. Report Distribution – Simple/Advance 4

3. Roll – Change of Ownership..... 5

4. Centralised Login Overview 7

 4.1 *Creating your User Account – Current Users*..... 7

 4.2 *Logging in to BCMax*..... 8

 4.3 *Creating a new BCMax user*..... 9

 4.4 *Remember Me, Password Reset and Locked Accounts*..... 10

 4.5 *Standard Business Reporting Client*..... 11

 4.6 *Supervisor Password Prompt and Supervisor Password Reset* 11

 4.7 *Your Action Items*..... 11

5. Receipting configuration – Qld Legislation 12

6. Building Info – Account Group Buildings – ABN/TFN/GST and Number of Lots/Entitlements. 13

What’s Better..... 14

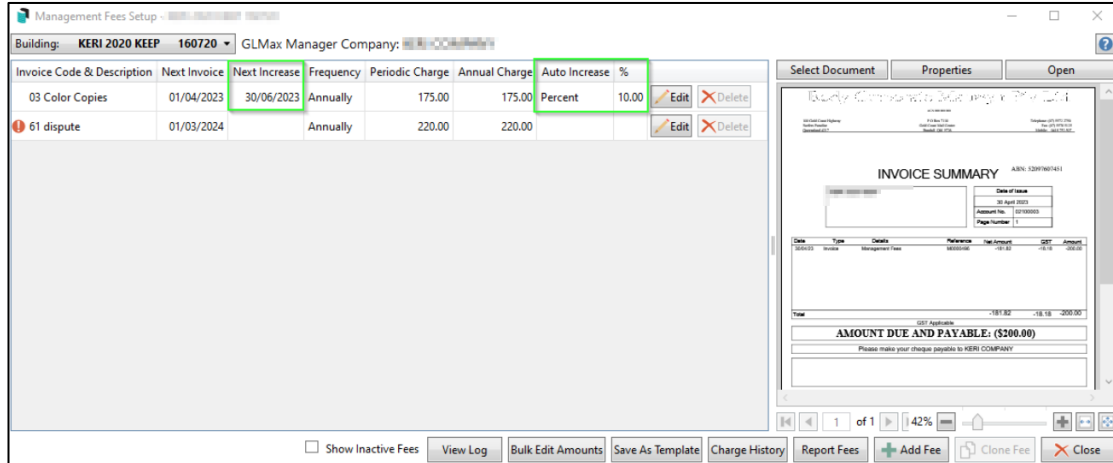
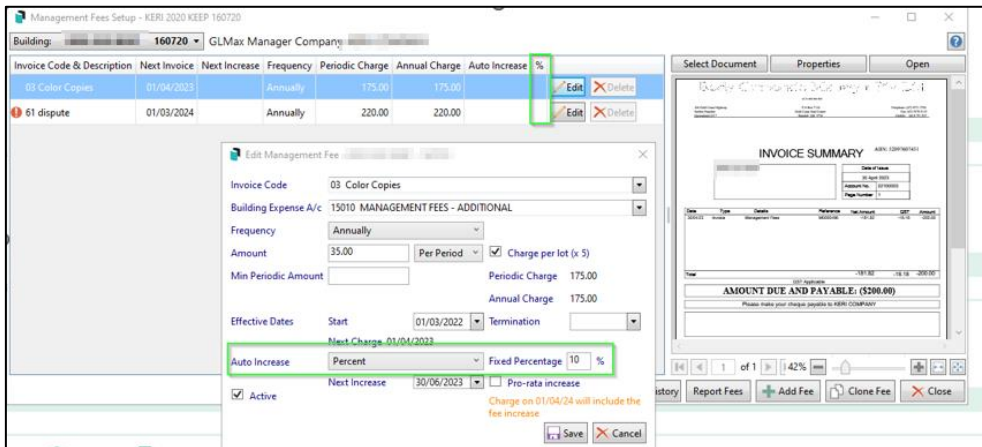
What's New

1. Management Fees Setup

1.1 New Columns added

Management Fees Setup screen will now display the percentage increase if set. This will allow users without permissions to view this information without having to select edit.

Example below:



1.2 Management Setup Report

The Management Setup report will now report all fields below:

- Description
- Annual Amount
- Frequency
- Periodic Amount
- Next Invoice

- Next Amount
- Next Adjustment
- Increase Style
- Inc %
- Start Date
- Term Date

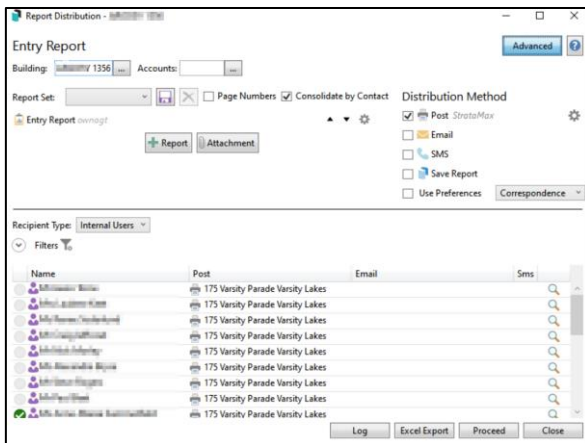
Management Fees Schedule 04 Jul 2023										
JUNDEL CREST TERRACES - KEEP CTS 31704										
Description	Annual Amount	Frequency	Periodic Amount	Next Invoice	Next Amount	Next Adjustment	Increase Style	Inc. %	Start Date	Term. Date
23 Management Fees	15,600.00	Fortnightly	600.00	01/08/23	600.00	30/09/23	Highest of CPI or	5.00	01/05/2023	
24 Renee Test	200.00	Quarterly	50.00	01/08/23	50.00	29/12/23	CPI		01/05/2023	27/10/2023
23 Management Fees	1,800.00	Monthly	150.00	01/08/23	150.00	01/12/23	Fixed Percentage	5.00	01/05/2023	

2. Report Distribution – Simple/Advance

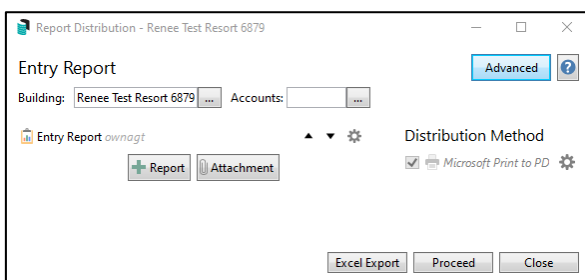
Report Distribution – Internal Reports (Roll List and Entry Report) now have the ability to be viewed in Simple or Advanced mode.

Advanced mode will show all options while simple mode will show a smaller screen with reduced options.

Example of Advanced:



Example of Simple:



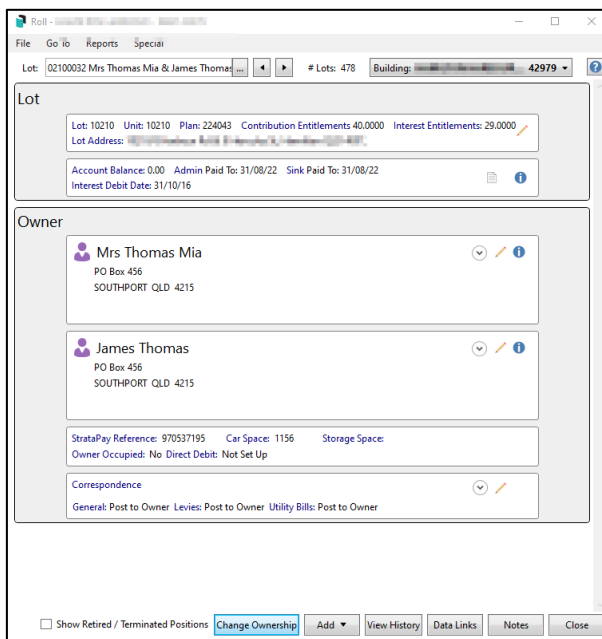
3. Roll – Change of Ownership

Enhancements have been made to provide an option during Change of Ownership to keep the StrataPay number and some of the original owners due to a Deceased/Divorced ownership.

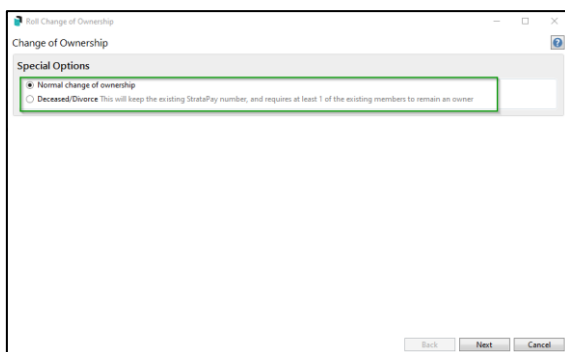
This new option will only be available if there are 2 or more owners with separate contacts in the roll.

To change an ownership due to deceased/divorced ownership, follow the below steps:

1. Navigate to 'Roll'
2. Select the lot for the change

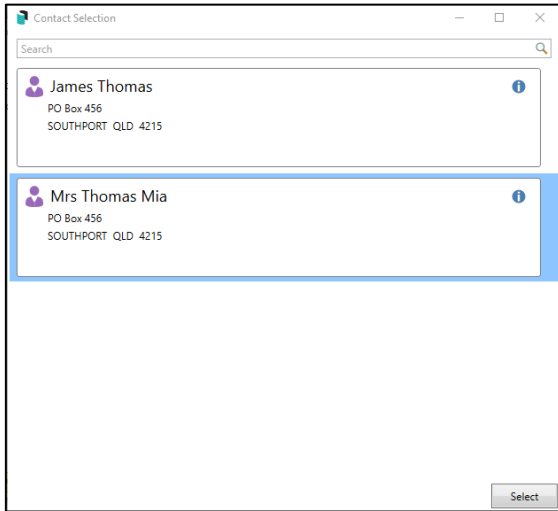


3. Click on 'Change of Ownership'
4. New Screen below will appear

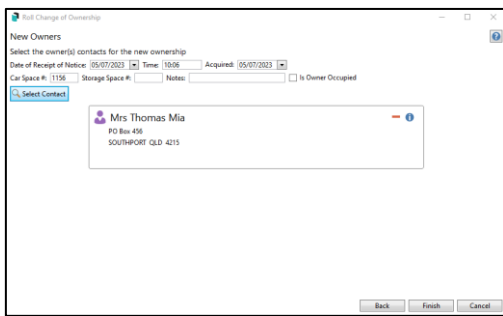


5. Select 'Deceased/Divorced' option
6. Click 'Next'

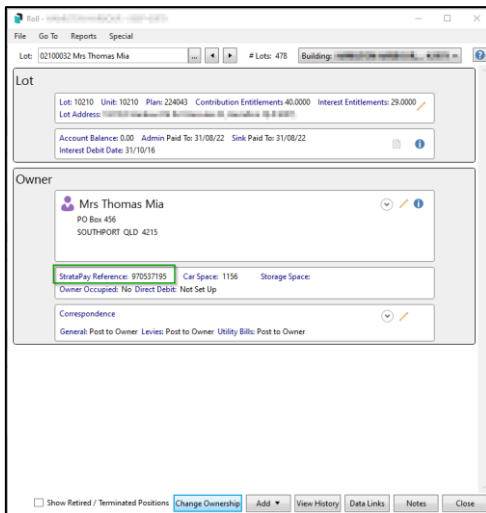
- 7. Click 'Select Contact'
- 8. Select the contact that you need to keep



- 9. Click 'Select'
- 10. Check the details and click 'Finish'



- 11. Print the Roll Distribution reports 'Close'
- 12. The Roll Record will be updated with the selected contact and StrataPay References will be the same as before



4. Centralised Login Overview

Switching to Email-Based Logins

Until now, your Windows username has been your key to accessing StrataMax. We're now switching gears to enable login via your email address. This transition is part of a broader strategy to make StrataMax more streamline and use fewer system resources, which means easier, more reliable, and more secure access for you.

If you've been using the Portal or Meeting Hub, you're already ahead, you've got a StrataMax user account tied to your email address. For others, setting up a new account at login directly from StrataMax will be a few simple steps.

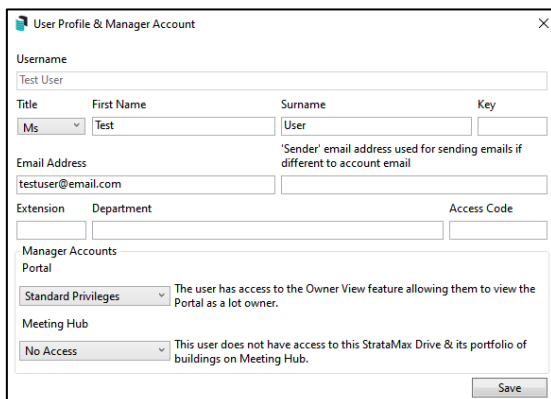


Important Note: Please ensure portal accounts for all active users are created and checked as soon as possible. Delays in creating and verifying these accounts could result in delays receiving future updates.

4.1 Creating your User Account – Current Users

Existing BCMMax users will need to ensure their user profile in BCMMax Security Setup has a unique, valid email address and access to the StrataMax Portal is enabled.

Standard privileges are required as a minimum.

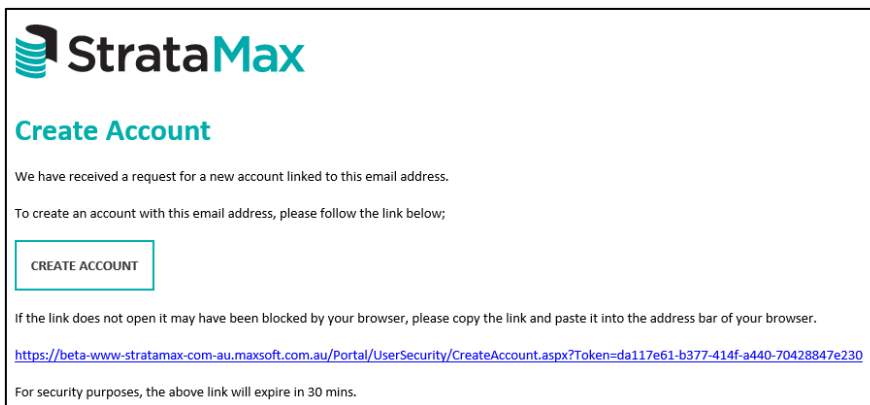


Once saved in BCMMax, a user account can be created using the StrataMax Portal.

4.1.1 Creating the account and password on the Portal

Follow the steps below to create the account and password on the StrataMax Portal.

1. Navigate to <https://www.stratamax.com.au>
2. Enter the email address that matches the user profile in BCMMax Security Setup
3. Click 'Send Email' – an Automated email will be sent to the specified email address.
4. Access the email and click the link to create a password.
5. Enter user details and tick Terms and Conditions on the next page to complete activation of the account.



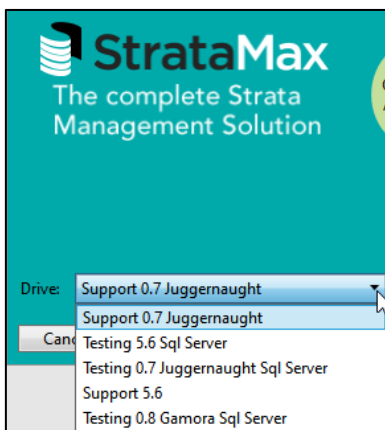
Your email address and portal password will be your BCMMax Login Credentials.

4.2 Logging in to BCMMax

Once you have created usernames and passwords, click the BCMMax launcher and the new login screen will be presented. Click Login to open BCMMax.



Managers with access to multiple drives will be presented with a drop down list of drives and can select which one they would like to work in.



4.3 Creating a new BCMax user

Security Administrators will have the ability to create a new user for new staff members who need to access BCMax.

To create a new user, use the steps below:

1. Login to BCMax using credentials with Administrator access.
2. Search or select Security Setup
3. Click 'Add User'.
4. Add the required data.
5. Click 'Save'

Once saved, a portal account can be created (See [Section 1.1](#)).

4.4 Remember Me, Password Reset and Locked Accounts

4.4.1 Remember Me

Tick the 'Remember Me' option on the login page means StrataMax can keep you logged in for up to seven days.

4.4.2 Forgot Password

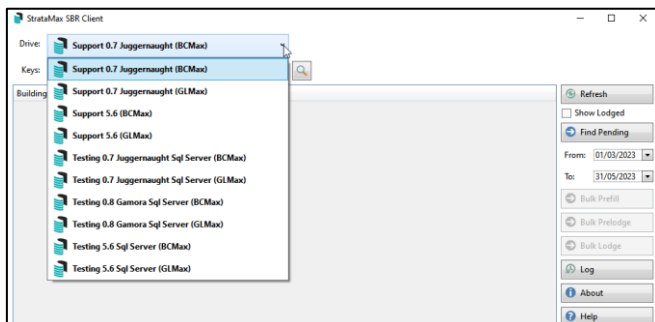
Click 'Forgot Password' and follow the steps to reset if you have forgotten your login password.

4.4.3 Locked Accounts

If the incorrect credentials are used 5 times, the account will become locked and will not be reset for fifteen minutes. The user can try again after the lockout period or alternatively use the Forgot Password function to reset their password.

4.5 Standard Business Reporting Client

Accessing the SBR client from BCMax will now also present the log in screen. Use your credentials to log in to the client. Managers with access to multiple drives will be presented with a drop-down list of drives and can select which one they would like to work in.



4.6 Supervisor Password Prompt and Supervisor Password Reset

The Supervisor Password override prompt and Password reset options have been removed in this version. Right click overrides will still present a confirmation screen where applicable but an override password will not be required.

4.7 Your Action Items

1. **Verify User Accounts:** Please ensure each StrataMax user account is linked to the correct individual email address and user details. Review this [page](#) for details)
2. **Clean Out Unused Accounts:** If a team member has moved on, please delete their StrataMax account. All their activity logs will still be available for your reference. Learn how to delete users [here](#).
3. **Avoid Generic Email Addresses or Sharing:** Using shared or generic email addresses (like levies@abcstrata.com) for login as it can make it tricky to track activities in the logs to a specific person. To ensure clear accountability, we recommend using individual email addresses for each user.

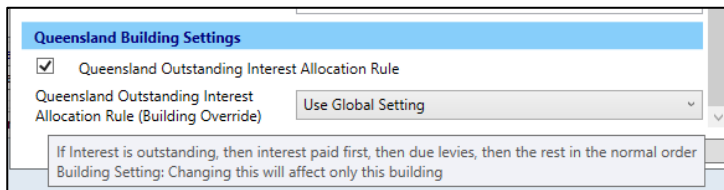
Please Note: Unique Emails: Each user account will need a separate email address to login to StrataMax. Historically, we have seen users accessing StrataMax from different windows user accounts to run simultaneous global tasks. Users will still be able to do this on different windows sessions but will be able to login with the same email for each StrataMax session. This will have the added benefit of clean and concise logs showing just one user rather than multiple.

5. Receiving configuration – Qld Legislation

A new configuration is now available for ‘Queensland Outstanding Interest Allocation Rule’.

To set this new configuration option, follow the below steps:

1. Navigate to ‘Receipt Entry’
2. Select ‘File/Configure’
3. New configuration is available to set as per below:



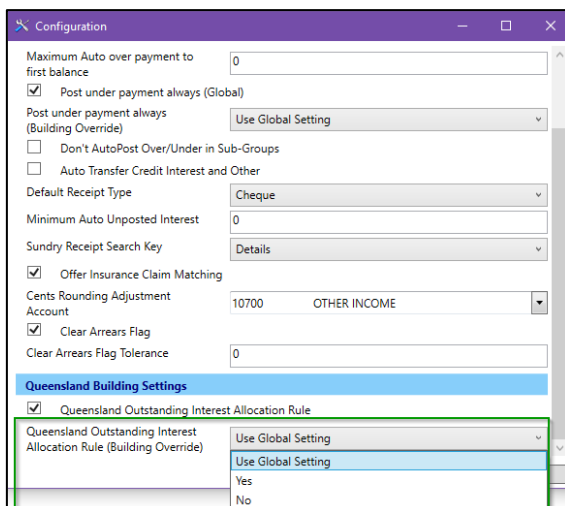
The allocation using this new setting will implement in the following order:

- Interest is outstanding
- The building is in Queensland
- The global configuration ‘Queensland Outstanding Interest Allocation Rule’ is on and not overridden to Off OR is overridden too On.

If this setting is Ticked, then the following order of allocation of receipt will occur in this order:

- Interest if outstanding will be paid first
- Due Levies
- Rest of the amount will post as per the normal order

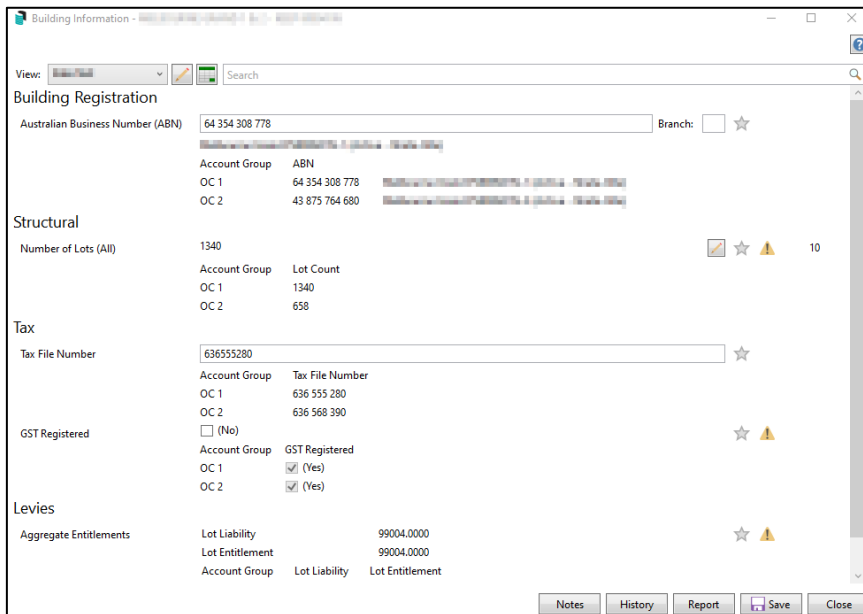
Please Note: The building setting will only affect the building that you are currently in when selecting the Building Override setting to Use Global, Yes, No:



6. Building Info – Account Group Buildings – ABN/TFN/GST and Number of Lots/Entitlements

Enhancements have been made to Building Information for Account Group Buildings to display the ABN, TFN, GST Registered and Number of Lots/Entitlements based on the Account Group Setup.

These enhancements can be seen in Building Information, example below:



Please Note: All the information reporting in Building Information this only read as all the information is setup in Account Group Setup. Users can also report to excel if these fields are selected. Essentially each of the Account Groups should display these fields specific to the Account Group.

What's Better

- Log Viewer – Description field has been made wider
- Notes – Currently images can be posted into Notes, these notes are stored in BCMax database, but these should really be DocMax documents. Notes will now automatically strip images on paste.
- Report Distribution – Ledger Card – The Report Distribution Ledger Card was including Levies not Due on the report (not Deposit Balance). The report will now match the BCMax report where Levies not due are not included.
- Merge Letters – Report Distribution – Nameandaddressauto and NameandLevyNoticeaddressauto fields were only including the name of the first contact if addresses are the same. Both contacts will now be shown on the letter. Roll Details Confirmation Report will now produce a form for each contact in the same report using the individual contact name if the address is the same.
- Add New Building – Vic Buildings – Split Lot data will not be populated in GenLed
- Tax File Number is no longer stored or transmitted, therefore the TFN field has been removed from the Webapi and Datasync.
- Reduce database size by removing the duplication in cheques and eft tables. This will also simplify the upgraded process to the new payments process.
- Report Distribution – Crash was occurring due to a Printer Name longer than 50A, this has now been resolved
- Budget Update – Menu/GoTo/Levy Maintenance menu option has been disabled if Selected for a building's old year.
- Bing Mail – Levies (old screen) – sending to BING includes empty letters array data which prevents address data being read