Release Notes – Version 5.6.87

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. Centralised Logins - One-time Access Codes for Managers

We have added the ability for Managers to generate a one-time access code which can be used to provide limited access to temporary users such as search agents.

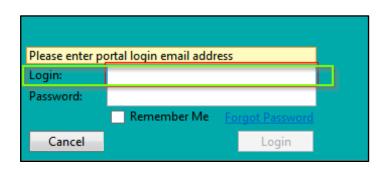
This code can be provided to the search agent who can then access StrataMax with the permissions set for the selected User.

To create a one-time access login code, please use the following steps:

- 1. Navigate to Security Setup
- 2. Right click the Username you want to provide access to.
- 3. Click 'Generate One-Time-Access Login Token The Login Code will be generated and displayed as per below.

Security						\times
Usemame	This login co and is valid fo directly into (*Expiry perio	or the next 30* the BCMax log od subject to cl	gle login as the minutes. This in field (no pas	sword needed).	Email Romainterrapionen Romain	^
Search Agent 1	User User	None None	None None	Mr Search Agent 1	search@testing.com	
	User User	Administrator None	Administrator None	It has been	and the second second	~
					Add User Close	•

4. Add the code to the 'Login' field on the StrataMax login screen.



Once entered the Login option will become available.

5. Click 'Login' to access StrataMax.

Access Code:	#0007973A
Cancel	Login

Please Note: This code will expire after 30 minutes. If the code has not been used in that time a new code should be generated.

2. DocMax – Notes field

Enhancements have been made to the Notes section of DocMax. The highlighted notes section below will now wrap text to allow more visibility to the user

Document View	— П X						
Home							
LR H 📛 🗙 🖶 🛄 🚯 🚯							
Preview Save and Open Delete Print Email View Copy to Pane - Close Document History Buildings							
Layout Document							
Document							
Notice of Annual General Meeting							
Document Profile Assigned To	· [
Status	Biological Solution (2010) State Solution (2						
Custom Properties							
Document Details							
Property Document Internal Document	03 August 2023						
Building CO	00832419						
Lot Details							
Owner							
Category MeetingHub Meeting Notices	Bethania						
Title Notice of Annual General Meeting							
Description Notice of Annual General Meeting for							
Notes This is a really long sentence that contains no page breaks, this should automatically wrap as soon as it gets to the end of the							
notes section on the line							
Search Words Add +							
✓ Online Portal							
✓ Invoice Details							
Document Source							
👽 File Details							

3. Search Selection Filters

Enhancements have been made to separate out selected items from the selection of the item when doing certain searches. The selected item will now only be updated when an item in the drop-down is double clicked or 'Enter' is pressed.

You can view this change in the following areas:

• Building Info - Account Manager Search

Building Information - Test Building RS 5689								ı ×
								0
View: Favourites 🔶 🗸 🗸	Search							Q
Building Registration								
Status	Active			Mar	k as Lost	*		
State, Legislation & Type	State Q)LD			~	*		
	Type B	uilding Format Plan (B.F.P.)			~			
	Regulatory Module A	Accommodation			~			
	Body Corporate and Commu	inity Management Act 1997						
Body Corporate Name	Test Building RS					*		
	5689					7		
Plan Number						Χ		
CTS Number	5689					*		
Property Type	Property Type 1					*	ď	
Structural								
Number of Lifts	7					*		
Number of Storeys						*		
Management								
Account Manager	Renee renee@testing.	.com.au		-	× ×	*	ď	
Other	Filter Laulen							
Financial Year Audit	Name Email Addres					.		
	Laulene Keet LK@Testing.c	tom				<u> </u>		
			Notes	History	Report	S S	ave	Close

• Filter selection in Searches – Creditor Search as example – Building Name, Account Manager type filters.

Creditor Invoice Items			-	×
Refresh Export Advanced				0
Field Cor	ndition	Value		
Invoice Date is o	on or after 🔹	✔ Specific Dates		
Building Number 🔹 is e	equal to 🔹	COMP1 RS TEST 2 VIC		
Account Manager 🔹 is e	equal to 🔹	Filter 9989894		
		Number Building Name Account Manager Management Office 9989894 RS SQUARE		

• DocMax - Creditor Search

	Discard Changes			
Document Profile			Assigned To	
Status		•	Action Date	•
 Custom Property 	ties			
 Document Det 	ails			
	Property Document Internal Doc	ument		
Building	Test Building RS	5689 • 🗙		
	Renee			
Lot Details				- 🗙
Owner				
Category	•			
Title	Renee Test Creditor Invoice			
Description				
Notes				
Search Words	 Add + 			
 Online Portal 				
 Invoice Details 				
	Building is not Active on Invoice Hub			
		Include Inactive Creditors		
Creditor	08200008 TEST CREDITOR 1			- 🗙
Invoice Date	Filter renee test			
Invoice Number	Code Name			
Invoice Items	08200002 RENEE TEST COMPANY			
	(
			•	
Document Sou	rce			
 File Details 				

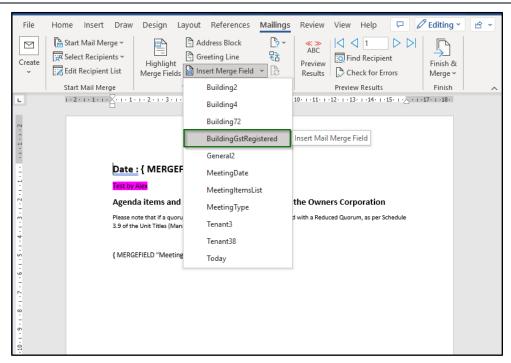
4. Meeting Hub Document Generation - New Field

A new merge field 'GST Registered' has been added to the merge field selection list. This will allow users to select this merge field to be used on templates:

uilding 🔨	Search	Q	Category	Description	Name
ontracts	Description	Name	Building	Building Long Name	<building-72></building-72>
reditor eneral	GST Registered	<buildinggstregistered< td=""><td>Building</td><td>Building Number</td><td><building-2></building-2></td></buildinggstregistered<>	Building	Building Number	<building-2></building-2>
eneral Ledger Account	Higher Interest Period (Day	<buildinghigherinterest< td=""><td>Building</td><td>Building Type</td><td><building-4></building-4></td></buildinghigherinterest<>	Building	Building Type	<building-4></building-4>
spect	Insurance Valuation	<buildinginsurancevalua< td=""><td>Building</td><td>GST Registered</td><td><buildinggstregistered></buildinggstregistered></td></buildinginsurancevalua<>	Building	GST Registered	<buildinggstregistered></buildinggstregistered>
surance etting Agent	Insurance Valuation By	<buildinginsurancevalua< td=""><td>General</td><td>Account Code</td><td><general-2></general-2></td></buildinginsurancevalua<>	General	Account Code	<general-2></general-2>
evy Struck	Insurance Valuation Date	<buildinginsurancevalua< td=""><td>Meeting Hub - Items</td><td>Meeting Items List</td><td><meetingitemslist></meetingitemslist></td></buildinginsurancevalua<>	Meeting Hub - Items	Meeting Items List	<meetingitemslist></meetingitemslist>
evy Un-struck	Interest Days	<buildinginterestdays></buildinginterestdays>	Meeting Hub - Meeting	Meeting Date	<meetingdate></meetingdate>
leeting Hub - Adjournment	Last Annual General Meetir	<meetinglastannualger< td=""><td>Meeting Hub - Meeting</td><td>Meeting Type</td><td><meetingtype></meetingtype></td></meetinglastannualger<>	Meeting Hub - Meeting	Meeting Type	<meetingtype></meetingtype>
leeting Hub - Attendance leeting Hub - Committee	Last Audit Date	<buildinglastauditdate< td=""><td>Special</td><td>Today</td><td><today></today></td></buildinglastauditdate<>	Special	Today	<today></today>
leeting Hub - Items	Last Backflow Tested	<buildinglastbackflowt< td=""><td>Tenant</td><td>Lot Number</td><td><tenant-38></tenant-38></td></buildinglastbackflowt<>	Tenant	Lot Number	<tenant-38></tenant-38>
leeting Hub - Meeting	Last Committee Meeting D	<meetinglastcommitte< td=""><td>Unknown</td><td>Unknown or invalid merge</td><td><tenant-3></tenant-3></td></meetinglastcommitte<>	Unknown	Unknown or invalid merge	<tenant-3></tenant-3>
fficer oll Info	Last Financial Year End Dat	<buildinglastfinancialy< td=""><td></td><td></td><td></td></buildinglastfinancialy<>			
pecial	Last Financial Year Start Da	< RuildingLastFinancialVi	<	_	

Merge Field Editor Example below:

New merge field once available can be added to the template document, example below:



New Field will show on the Notice document that includes the new field as 'Yes', example below:

15 August 2023	
IS THE BUILDING GST REGISTERED	

What's Better

- Refunds Processing a refund generates a YearCode not found error, this has been resolved
- Building Info Account manager was sometimes cleared when editing Building Information, this has now been resolved.
- Funds Management Report The Cover Sheet has been updated to report 'Regulation Date 2022'
- Report Distribution Reports were printing for Letting Agents and Tenants even if preference is email only. This has been corrected.
- Roll/Change Ownership Postal Address will be limited to 30 characters when a Change of Ownership is performed if 'Owner Occupied' is set.
- Utility Billing Templates Follower pages were not producing in Utility Billing Templates. This has been corrected.
- Roll Details Confirmation Report Lot owner's address will now be displayed on the report even if the report is emailed and not posted or printed.
- Report Distribution Levy Notice Output Account Groups Unpaid Invoices will now be displayed under the relevant Account Group when generated in Report Distribution.
- Report Distribution Print tray option will be suppressed in Report Distribution screen when already set in Printer Properties.