

Release Notes – Version 5.6.88

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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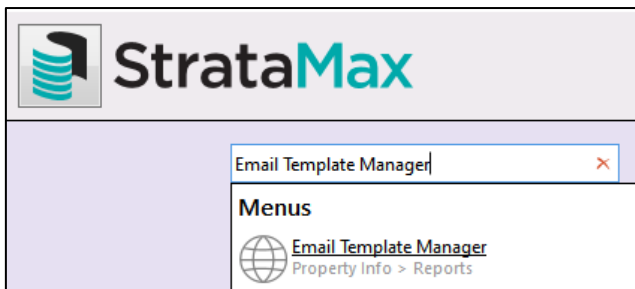
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What's New

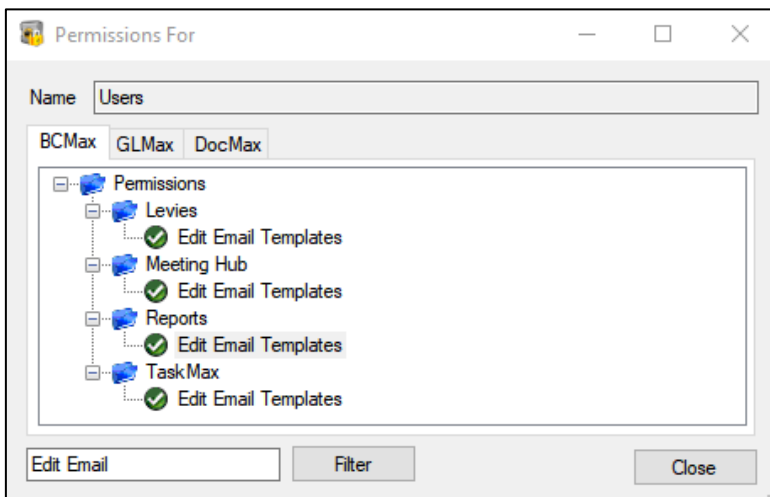
1. Email Template Manager

Access to the Email Template Manager will now be available from the StrataMax Desktop Search or can be added to the desktop as a stand-alone menu icon. To see the new item, click into the StrataMax Desktop Search and type 'Email Template Manager'. This is in addition to access through Levy Notice and Reports, TaskMax, Meeting Hub and Report Distribution screens.



1.1 Edit Email Template Security

The Reports - Edit Email Templates Security permission will control access to Email Template Manager from the desktop. Any access provided previously for this permission will be used to manage access to the desktop menu item. Current security settings will remain applied for Levy Notice Templates, Meeting Hub Template and TaskMax Templates. If access was previously denied to editing email templates in these areas, it will not be available for selection in Email Template Manager from the Desktop menu item.

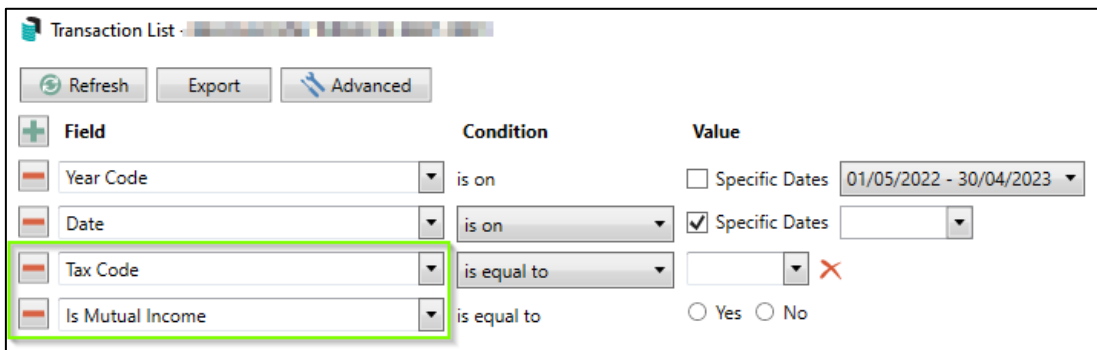


2. Search Transactions – New Search Fields and Conditions

Tax Code and Mutual Income and Invoice Reference fields have been added to the Search Transactions search. Further list operators have been added for Account Code and Invoice Code fields and Batch and Reference No can be searched using 'Starts With' condition.

To review these changes search for 'Search Transactions.'

Click the 'Field' selector to see Tax Code and Mutual Income fields.



Set Account Code and Invoice Code fields and review conditions to see new list options.

Transaction List - [Title]

Refresh Export Advanced

Field	Condition	Value
Year Code	is on	<input type="checkbox"/> Specific Dates 01/07/2023 - 30/06/2024
Date	is on	<input checked="" type="checkbox"/> Specific Dates
Account Code	is equal to	

262 records displayed

Batch No	Date	Account Code	Account Description	Typ
000	01/07/2023	004	ADMINISTRATIVE FUND	J
000	01/07/2023	02100001	General Testing Trust Co	J
000	01/07/2023	02100001	General Testing Trust Co	J
000	01/07/2023	02100002	General Testing Trust Co	J
000	01/07/2023	02100002	General Testing Trust Co	J
000	01/07/2023	02100003	General Testing Trust Co	J
000	01/07/2023	02100003	General Testing Trust Co	J
000	01/07/2023	02100004	General Testing Trust Co	J
000	01/07/2023	02100004	General Testing Trust Co	J
000	01/07/2023	02100005	General Testing Trust Co	J
000	01/07/2023	02100005	General Testing Trust Co	J
000	01/07/2023	02100006	General Testing Trust Co	J
000	01/07/2023	02100006	General Testing Trust Co	J
000	01/07/2023	02100007	General Testing Trust Co	J

- 004 - ADMINISTRATIVE FUND
- 005 - SINKING FUND
- 006 - TRANSFERS
- 011 - CASH ON HAND
- 012 - CASH AT BANK
- 01300 - BANK BALANCE ADMIN FUND
- 01301 - INVESTMENT ACCOUNT 1
- 01302 - INVESTMENT ACCOUNT 2
- 01400 - BANK BALANCE SINKING FUND
- 01401 - INVESTMENT A/C SINKING FUND
- 01402 - INVESTMENT A/C SINKING FUND 2
- 01510 - BANK BALANCE ADDITIONAL FUND 1
- 01511 - INVESTMENT A/C ADDITIONAL 1
- 01520 - BANK BALANCE ADDITIONAL FUND 2
- 01521 - INVESTMENT A/C ADDITIONAL 2
- 021 - LEVIES IN ARREARS
- 02100001 - General Testing Trust Co.

Set Batch and Reference No fields to use the 'Starts With' condition for these fields.

Transaction List - BEACHHOUSE TERRACES KEEP 26891

Refresh Export Advanced

Field	Condition	Value
Year Code	is on	<input type="checkbox"/> Specific Dates 01/05/2022 - 30/04/2023
Date	is on	<input checked="" type="checkbox"/> Specific Dates
Batch No	starts with	
Reference	starts with	

3. Search Buildings

A 'Search Buildings' feature has been added which will allow fields from Building Information to be searched across all Buildings and exported to excel. This will offer much faster reporting than Custom Reports.

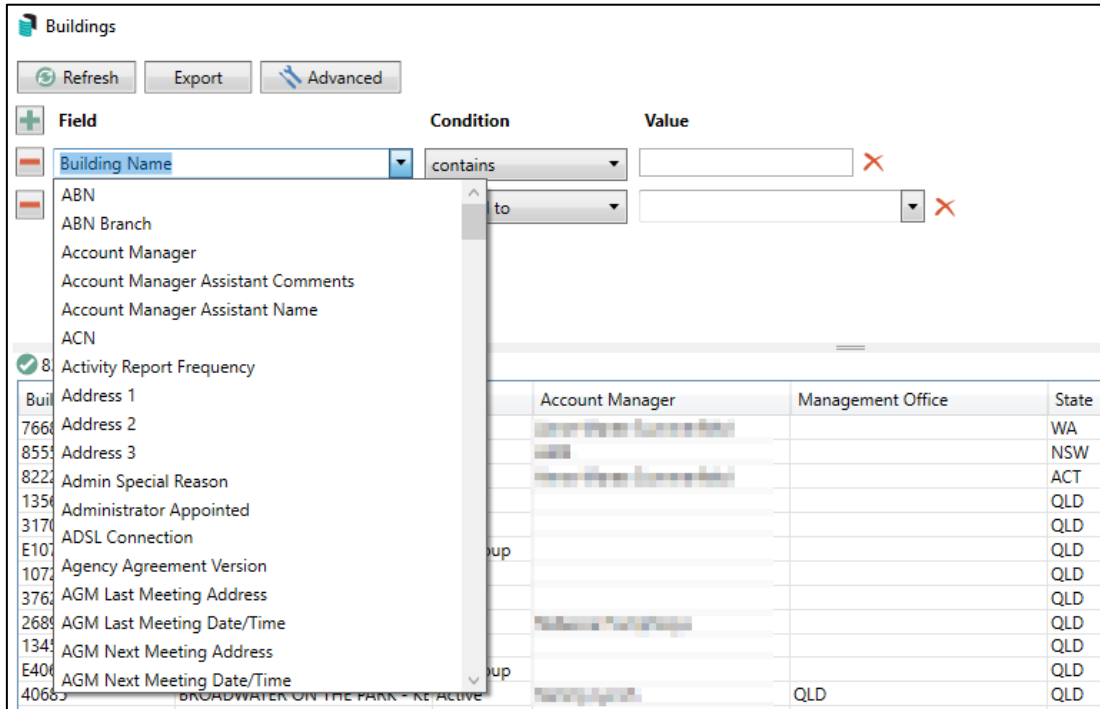
search buildings

Menus

- Search Buildings
Property Info > Information

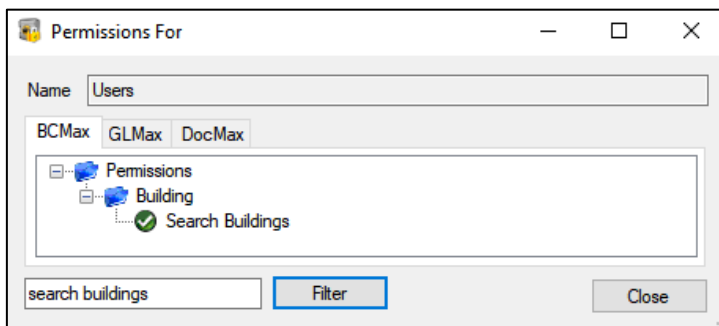
To see the new search type 'Search Buildings' into the BCMax or GLMax desktop search and click the menu item. Standard search conditions and values are available, and searches can also be saved.

It is recommended to create & save searches for global reporting requirements that custom reports may have previously been used for.



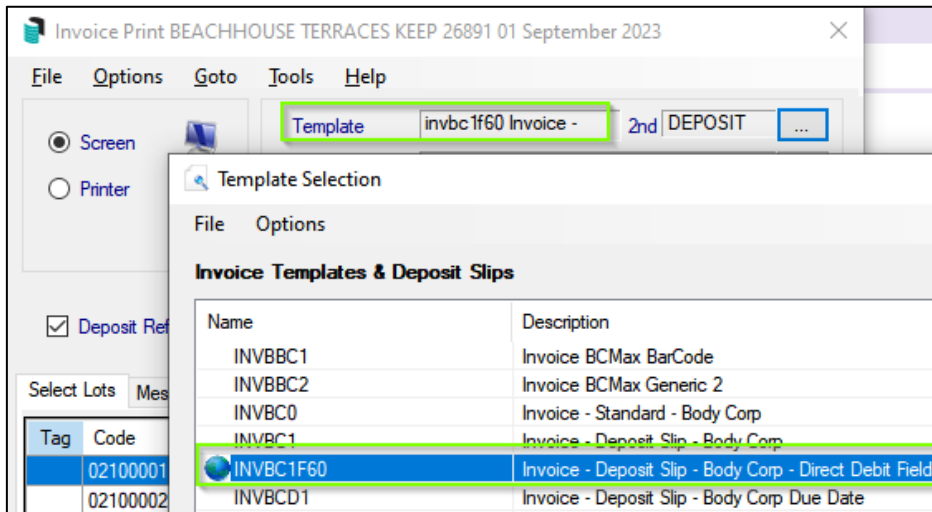
3.1 Search Buildings Security

A new security permission has been added to Building permissions - Building - Search Buildings. To review the new security permission, navigate to Security Setup, type 'Search Buildings' into the filter and click filter. Right click to set Allow, Deny, or Inherit.



4. Invoice Printing – DDR message (Field 60)

The Direct Debit message (Field 60) has been activated for Invoices. The INVBC1F60 template now has this field and can be used to display the message on an Invoice. Navigate to Invoice Entry, click the template selector, and select INVBC1F60 to use this template.



[Click here to see the StrataMax Help pages for Direct Debit setup process and messages.](#)

What's Better

- Search Creditor Invoices – GLMax – Was generating an error if a BPay CRN was included. This field has now been removed. Log Level Error search will now complete if ID is included also.
- Merge Letters – Subgroup Unit Number and Lot Number Merge Fields have been activated.
- New Style Levy Notices – VB Levy Reports using New Style Templates were not reading Report Tags.
- Report Distribution – Levy Notice, Merge Letters and Ledger Card was not showing owner address title when sending to agent/other.
- Roll – Insert Original Owner – The correct date will now be populated in History when adding an Original Owner.
- Dashboard Arrears vs Budget Percent report – This report was not showing part-paid arrears and was therefore not reflecting correct building arrears totals. The report will now calculate the correct arrears total where arrears are part paid.