Release Notes – Version 5.6.89

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. StrataCash Periodic Payment – Creditor List

Preferred Creditors and Inactive Creditor filters have been added to the Periodic Payments account selector.

To view this enhancement following the below steps:

- 1. Navigate to StrataCash Hub
- 2. Select Periodic Payments
- 3. Click on Select
- 4. Select Payee
- 5. Click on the Add

Periodic Payments -									Х
Fees and Charges may apply 🕞 Refresh								Ado	9
Reference	Status	Payee	Payee Name	Start Date	End Date	Amount	Frequency		
0000001	1	08200008	TEST CREDITOR 1	13/09/2023	31/10/2023	200.00	Fortnight	у	

- 6. The Creditor Account code list will open.
- 7. The new Options showing below will be available.

Reference		ayee Name	Start Date	End Date	Amount	Frequency
0000000	08200008	TEST CREDITOR 1	13/09/2023	31/10/2023	200.00	Fortnightly
	Periodic Pay	ment Edit - Renee Test PP 4565	i96		- 🗆	×
	Reference	(Create)				0
	Payee					
Account	Code List - Renee Test PP	456506				
 Account 	Code List - Kenee Test PP 4	420290				
		20230	Show	Preferred Cred	itors Only 🔲 S	Show Inactive Credit
earch			Show	Preferred Cred	itors Only 🔲 S	
earch	Name	OPCOCT		Preferred Cred		
Gearch Creditors	٩					Show Inactive Credit
Search Creditors Code ^	Name	ABN			T BSB	Show Inactive Credit
earch Creditors Code ^ 08200001	Name SUNDRY CREDITORS	ABN	YT	D Balance EF	T BSB	Show Inactive Credit
earch Creditors Code ^ 08200001 08200002	Name SUNDRY CREDITORS RENEE TEST COMPANY	ABN	γT	D Balance EF	T BSB	Show Inactive Credit

- 8. Click on 'Show Inactive Creditors'
- 9. The Inactive Creditors will now appear on the Account Code List

account (Code List - Renee Test PP 456596				_	· 🗆 X
Search	Q	[Show Preferred Cr	editors	Only 🖌 Sho	w Inactive Creditors
Creditors						
Code ^	Name	ABN	YTD Balance	EFT	BSB	Account Numb
08200001	SUNDRY CREDITORS					
08200002	RENEE TEST COMPANY			γ	184-446	4573452
08200003	AUSTRALIAN TAXATION OFFICE	Exempt				
08200004	ATO - INCOME TAX	Exempt				
08200008	TEST CREDITOR 1		0.00	Υ	184-446	13453647
08200010	TEST CREDITOR 3	51 824 753 556		γ	182-403	225874
08200014	AMS CREDITOR			Y	184-446	236565265

2. New Searches are now available.

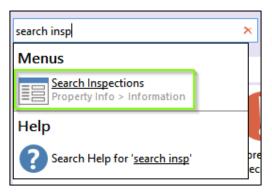
2.1 Search Inspections

'Search Inspections' is now available for users to search for all Inspection type information.

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

To access the new search, follow the below steps:

- 1. Navigate to the Search field.
- 2. Type in 'Search Inspections'



- 3. The 'Inspection Search' will open defaulting to 'Current Building' and 'Account Code'.
- 4. Change the search criteria you wish to search (status filters are available to match the Inspections module)
- 5. System will return the results based on the search criteria.

Search Inspectio	ns							—
S Refresh	Export Advanced							
Restrict To	Field		Condition	Value				
Columns	Current Building	•						
	Category	-	contains 🔻	Pest 🗙				
Sort Order			contains					
Advanced								
Advanced								
	ed			_				
8 records display		Account Code	Account Name	Category	Period	Next Due	Last Done	Inspected By Code
	red Building Name	Account Code 60015	Account Name PEST INSPECTIONS	Category PEST INSPECTIONS		Next Due 18/07/2016	Last Done 18/07/2015	Inspected By Code 08202038
8 records display uilding Number	Building Name				Period Annually Annually			
8 records display uilding Number	Building Name	60015	PEST INSPECTIONS	PEST INSPECTIONS	Annually	18/07/2016	18/07/2015	08202038
8 records display uilding Number	Building Name	60015 60015	PEST INSPECTIONS PEST INSPECTIONS	PEST INSPECTIONS PEST INSPECTIONS	Annually Annually	18/07/2016 11/08/2018	18/07/2015 11/08/2017	08202038 08202038
8 records display uilding Number	Building Name	60015 60015 60015	PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS	PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS	Annually Annually Annually	18/07/2016 11/08/2018 31/07/2019	18/07/2015 11/08/2017 31/07/2018	08202038 08202038 08202038
8 records display uilding Number	Building Name	60015 60015 60015 60015	PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS	PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS	Annually Annually Annually Annually	18/07/2016 11/08/2018 31/07/2019 31/07/2019	18/07/2015 11/08/2017 31/07/2018 31/07/2018	08202038 08202038 08202038 08202038 08202038
8 records display uilding Number	Building Name	60015 60015 60015 60015 60015 60015	PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS	PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS PEST INSPECTIONS	Annually Annually Annually Annually Annually	18/07/2016 11/08/2018 31/07/2019 31/07/2019 30/03/2022	18/07/2015 11/08/2017 31/07/2018 31/07/2018 30/03/2021	08202038 08202038 08202038 08202038 08202038 08202038

2.1.1 Search Inspection Security

Security is also available to set permissions for 'Search Inspections'

😨 Permissions For	_		×
Name			
BCMax GLMax DocMax			
emissions			
Search Inspectic Allow			
😮 Deny			
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search ins Filter		Clos	se 🛛

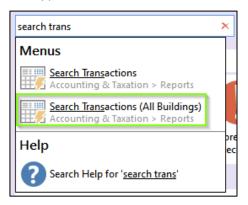
2.2 Search Transactions (All Buildings)

Users can now search for all Transactions across selected or All Buildings.

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

To access the new search, follow the below steps:

- 1. Navigate to Search Field
- 2. Type in 'Search Transactions



- 3. The Transaction Search (All Buildings) will open defaulting to 'current building', 'Date' and 'Account Code'.
- 4. Change the search criteria you wish to search (status filters are available to match the Search Transactions)

Pransaction List (All Buildings) -	0.0 0.00	
S Refresh Export Advanced		
Field	Condition	Value
Account Code	starts with 🔻	021 🗙
Amount 💌	is equal to 🔹	1000 🗙

5. System will return the results based on the search criteria.

🛞 Refresh	Export	Advanced								
Field		Conditi	on	Value						
Account	t Code	▼ starts w	ith	• 021 ×						
- Amount	:	▼ is equal	to	▼ 1000 ×						
_										
4 records o	displayed									
Date	Account Code	Account Description	Туре	Amount Invoice Code	Invoice Code Description	Description	Reference	Exta Details	Extra T	Text
31/12/2020	02100001	Party states and the	1	1,000.00 01	Admin Fund	01/03/21 to 31/05/21	10000506	L0000102		
1/12/2020	02100030	In the second second	1	1,000.00 01	Admin Fund	01/03/21 to 31/05/21	10000535	L0000131		
4/09/2017	02100206	100 B 100 B 100 B	P	1,000.00 01	Admin Fund	Refund overpayment	F0001037			
8/02/2021	02100001	president and president of the	D	1,000.00 18	Other	Test	M0000001			

2.2.1 Search Transactions (All Buildings) Security

Security is also available to set permissions for 'Search Transactions (All Buildings)

😨 Permissions For	—		×
Name			
BCMax GLMax DocMax			
Permissions Menus Search Transactions Search Transactions (All Buildings)			
search tr Filter		Close	e

Please note: This search is also available to search across all GLMax Companies when accessed through GLMax.

What's Better

- Security We have modified Email Template security Control wording to be clearer. The following controls have been changed.
 - Levies Edit Email Templates has changed to Edit Levy Email Templates
 - Meeting Hub Edit Email Templates has changed to Edit Meeting Hub Email Templates
 - TaskMax Edit Email Templates has changed to Edit TaskMax Email Templates
 - Reports Edit Email Templates has changed to Email Template Manager
- Report Distribution Ledger Card LastZeroBalance option will now show the last zero balance and the Total Debits/Credits Calculation has been corrected by displaying data in entered order.
- Centralised Logins Wording on the BCMax Login has been changed to remove the word 'Portal' from the login prompt.
- Merge Letters Selected text has been changed for better readability.
- Search Transactions Column Sort Order has been added to the Transaction Search
- Report Distribution Printing and Emailing from the log was causing an error: this has now been resolved.
- Contacts Illegal (reserved) characters will be validated and prevented when creating or editing contacts.
- Levy Notice Merge Levy Notice was crashing if the building was registered for GST, but the individual OCs were not. This has been resolved.
- Bank Transaction Report Where there is no statement data prior to the report start date and the first statement data has an opening balance, the brought forward line was missing from the report. This has been corrected.