

Release Notes – Version 5.6.92

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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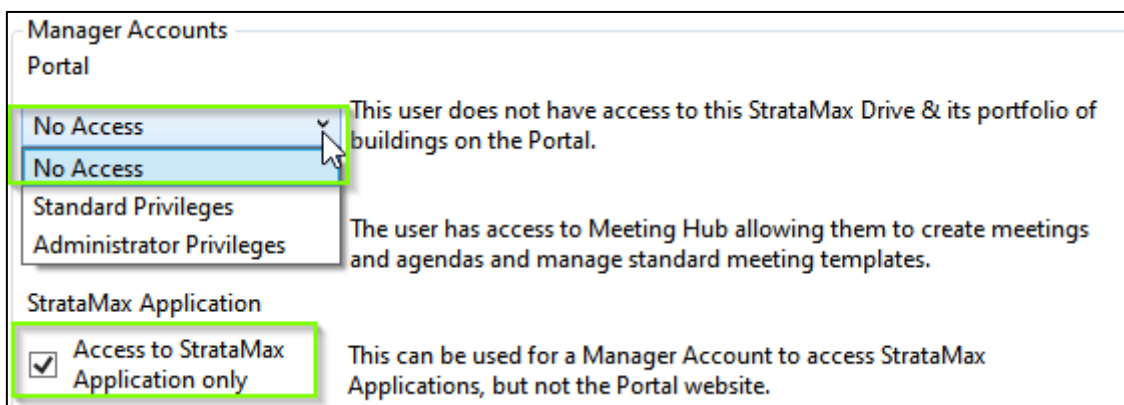
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What's New

1. Centralised Log In – Access to StrataMax Application only

We have added the ability to allow access to BCMax without providing access to the StrataMax Portal for use in circumstances where Portal Access is not appropriate – for example Third Party Access – Search Agent / Auditor / Accountant. To set an account with StrataMax access only, use the following instructions:

1. Navigate to Security Setup.
2. Click 'Add User' or right click on the user you are setting up.
3. Click 'Edit User Profile and Manager Account'.
4. Select 'No Access' in the Manager Accounts section – Portal Access selector. The Access StrataMax Application Only setting will be activated.
5. Tick 'Access to StrataMax Application only'.
6. Click 'Save'.

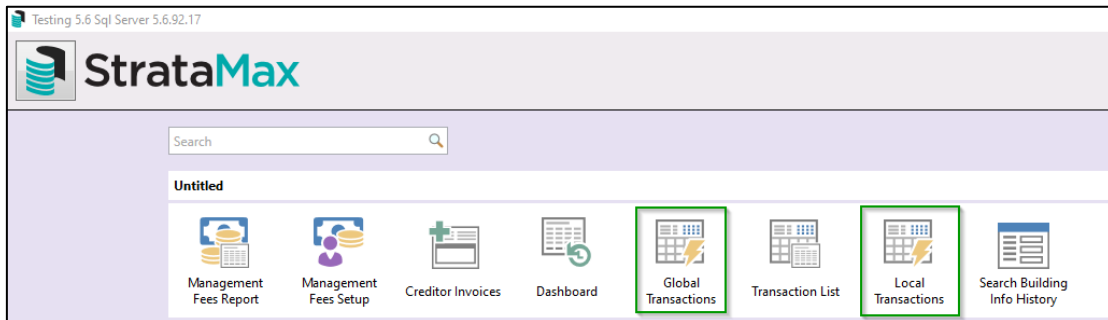


Once set, the user will have access to StrataMax application but will not have Managers access to any buildings on that drive on the portal.

2. New Searches are now available

Enhancements have been made to multiple searches to assist with clarity. There are now two new searches available 'Global Transactions' and 'Local Transactions', which will replace the following:

- Search Transactions
- Search Transactions (All Buildings)



Please Note: Local and Global Transaction searches will also be available in GLMax without Fund/OC field options.

Any saved searches from 'Search Transactions (All Buildings)' will be automatically converted to 'Global Transactions' saved searches. Any saved searches from 'Search Transactions' will also be converted to 'Local Transaction' saved searches.

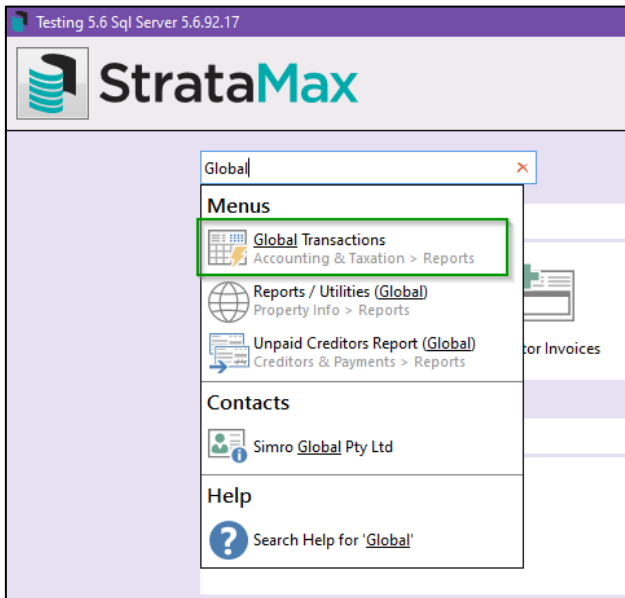
2.1 Global Transactions

A Global Transaction search will return search results from the 'Transaction Breakup' tables for all transactions for all buildings including OC buildings.

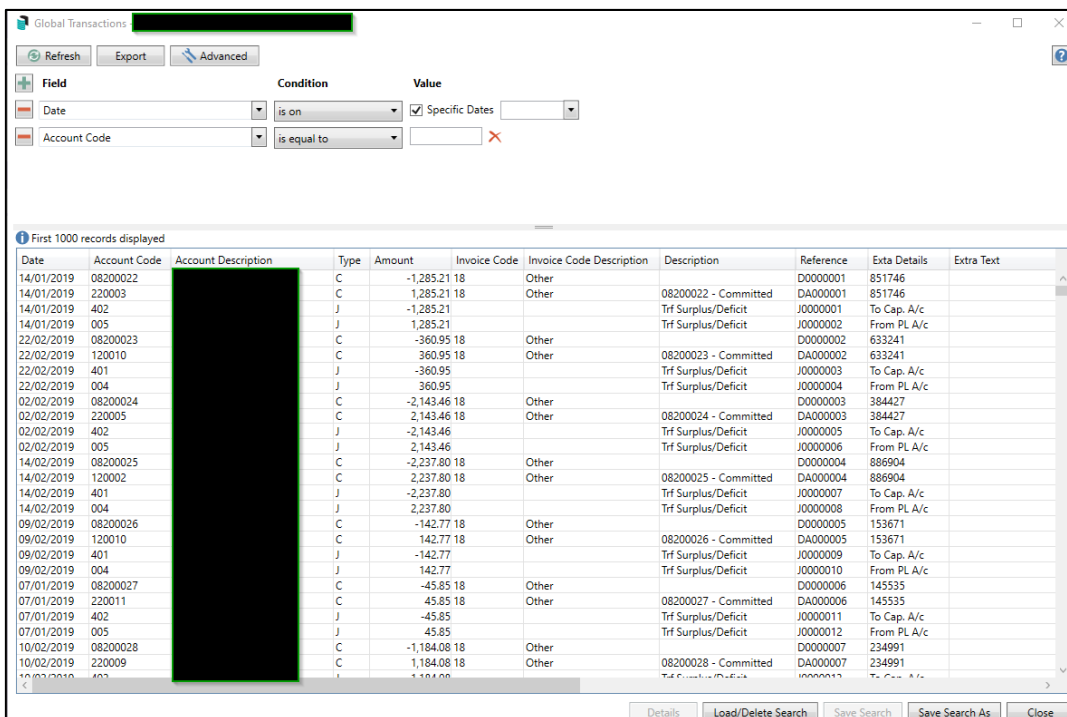
Account Group, Fund Code and Fund Name has been added to the new field selections.

To access these new searches, follow the below steps:

1. Navigate to Global Transactions
2. New Search will be available if permissions allow



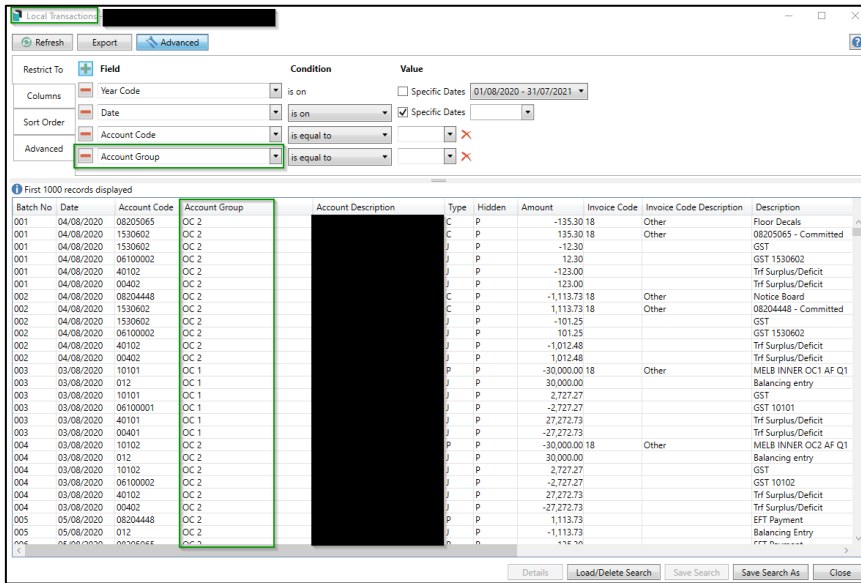
3. Global Transaction search will open



4. New fields for Fund/OC buildings will be available to be added to the filter and as displayed columns

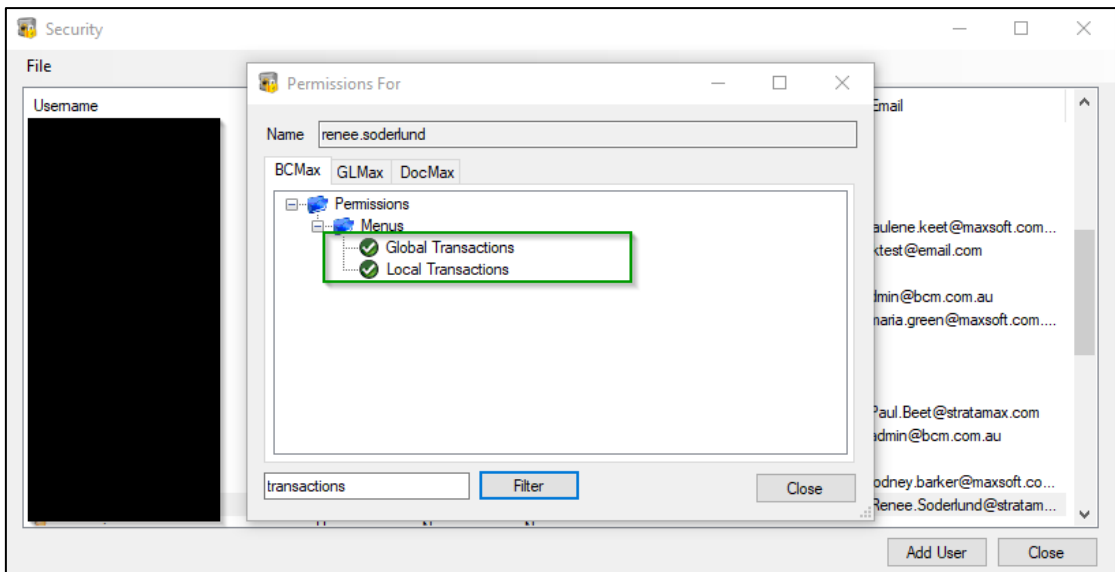
- 4. Select Local Transactions
- 5. Local Transaction search will open, Account Group will be a defaulted field

Note: There may be some transactions which appear to be duplicated if they are split between funds. Adding the Account Group / Fund columns would reveal the differences.



2.3 New Security permissions – Global and Local Transactions

New Security Permissions are available to replace the security permissions of the removed searches.



Please Note: Security set up for ‘Search Transactions (All Buildings)’ will automatically be converted to use ‘Global Transactions’ security and ‘Search Transactions’ will be automatically converted over to ‘Local Transactions’ Security.

3. BingMail Settings

The BingMail Settings have been changed from user level settings to Global settings. This will reduce the risk of output changing on standard processes purely because an individual was absent, and the process was run by another user.

The screenshot shows a 'Configuration' window with the following settings:

- Account ID: MAX70995
- Portal User: BCMAX-Upload-MAX70995
- Portal Password: *****
- Global Setting: Changing this will affect all users
- Hold For Approval
- Colour Model: Full colour

A green box highlights the 'Global Setting' and 'Hold For Approval' options. A 'Close' button is located at the bottom right of the window.

Please note: All tool tips for each of the below options have been updated to display correctly as global settings:

- Account ID
- Portal User
- Portal Password
- Duplex
- Hold For Approval
- Colour Model

When re-sending a prior job from the Report Distribution Log the recorded BingMail settings for duplex, hold and Colour model will now be used.

What's Better

- DocMax will no longer allow windows to be opened off screen.
- The performance of Receipt Entry has been improved.
- Disclosure Statements Sec 205 – This Statement was not adding included info in the correct field and "exceptions to clause 7.4(2)" has been changed to "exceptions to clause 7.4(3)".
- Report Distribution - Levy Templates with ledger page - New Levy Style Templates where there is a second page ledger card were outputting all ledger history and not reading the grid lines from the template. This is now resolved.
- Linked Lots - Change Ownership - Where a lot is linked and Change Ownership is clicked, the Data Links page should default to Apply Change where there are lots linked to a Subgroup.
- Auto Transfers - Pending transfer screen - We have added a column to show if transfer is incoming or out outgoing.
- Report Distribution - When viewing a prior job from the Report Distribution Log the error message "Documents not stored" was not shown when there are no documents and the Proceed button was disabled, the error message will now show correctly.