## 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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## 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 Pary 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'.

- Manager Accounts Portal	
No Access No Access	This user does not have access to this StrataMax Drive & its portfolio of buildings on the Portal.
Standard Privileges Administrator Privileges	The user has access to Meeting Hub allowing them to create meetings and agendas and manage standard meeting templates.
StrataMax Application	
Access to StrataMax Application only	This can be used for a Manager Account to access StrataMax Applications, but not the Portal website.

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)

Testing 5.6 Sql Server 5.4	6.92.17							
Stra	ita <mark>Ma</mark> x	x						
	Search		٩					
	Untitled							
	Management Fees Report	Management Fees Setup	Creditor Invoices	Dashboard	Global Transactions	Transaction List	Local Transactions	Search Building Info History

**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

Testing 5.6 Sql Server 5.6.92.17								
StrataMax								
	Global	×						
	Menus							
	Global Transactions							
	Reports / Utilities ( <u>Global</u> ) Property Info > Reports							
	Unpaid Creditors Report (Global) Creditors & Payments > Reports	or Invoices						
	Contacts							
	Simro <u>Global</u> Pty Ltd							
	Help							
	Search Help for ' <u>Global</u> '							
		-						

3. Global Transaction search will open

Refresh	h Export	🔧 Advanced								_	>
Field			Condition	Value							
<ul> <li>Date</li> </ul>			is on	✓ Speci	fic Dates	-					
Accour	nt Code	·	is equal to	•	X						
First 1000	) records displayed										
Date		Account Description	а Туре	Amount	Invoice Code	Invoice Code Description	Description	Reference	Exta Details	Extra Text	
14/01/2019	08200022		C	-1.285.21	18	Other		D0000001	851746		
4/01/2019	220003		C	1,285,21	18	Other	08200022 - Committed	DA000001	851746		
4/01/2019	402		J	-1.285.21			Trf Surplus/Deficit	J0000001	To Cap. A/c		
4/01/2019	005		J	1,285,21			Trf Surplus/Deficit	J0000002	From PL A/c		
2/02/2019	08200023		C	-360.95	18	Other		D0000002	633241		
2/02/2019	120010		c	360.95	18	Other	08200023 - Committed	DA000002	633241		
2/02/2019				-360.95			Trf Surplus/Deficit	J0000003	To Cap. A/c		
2/02/2019	004		1	360.95			Trf Surplus/Deficit	J0000004	From PL A/c		
2/02/2019			C	-2.143.46	18	Other		D0000003	384427		
2/02/2019	220005		c	2,143,46		Other	08200024 - Committed	DA000003	384427		
2/02/2019	402			-2,143.46			Trf Surplus/Deficit	J0000005	To Cap. A/c		
2/02/2019			i i	2,143,46			Trf Surplus/Deficit	10000006	From PL A/c		
4/02/2019			c	-2.237.80	18	Other	in ourplus, benere	D0000004	886904		
4/02/2019	120002		c	2.237.80		Other	08200025 - Committed	DA000004	886904		
4/02/2019			i i	-2.237.80		o the	Trf Surplus/Deficit	J0000007	To Cap. A/c		
4/02/2019			i i	2,237,80			Trf Surplus/Deficit	J0000008	From PL A/c		
9/02/2019			c	-142.77	18	Other	in surplus bener	D0000005	153671		
9/02/2019	120010		c	142.77		Other	08200026 - Committed	DA000005	153671		
9/02/2019	401		1	-142.77		ouror -	Trf Surplus/Deficit	10000009	To Cap. A/c		
9/02/2019			j j	142.77			Trf Surplus/Deficit	J0000003	From PL A/c		
7/01/2019			c	-45.85	18	Other	in surplus/perior	D0000006	145535		
7/01/2019			c	45.85		Other	08200027 - Committed	DA000006	145535		
7/01/2019				-45.85	10	other	Trf Surplus/Deficit	J0000011	To Cap. A/c		
7/01/2019			, j	-45.85			Trf Surplus/Deficit	J0000011	From PL A/c		
0/02/2019			, C	-1,184.08	10	Other	in aurplus/Deficit	D0000012	234991		
0/02/2019			c	-1,184.08		Other	08200028 - Committed	DA000007	234991		
0/02/2019				1,184.08	10	Other	vozuuuzo - Committed	DA000007	224991		

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

Global Transactions -					
Refresh Export	dvanced				
+ Field	Cor	ndition	Value		
- Date	▼ is c	on 🔻	✔ Specific Dates ▼		
Account Code	▼ is e	equal to 🔹	×		
Account Group		rts with 🔹	×		
Account Group Account Manager	^   cor	ntains 🔹	mel 🗙		
Amount Fi Batch No					
xta D Building Name	de	Fund Name	Account Group	Building Number	Building Name
0000 Building Number		OPERATING FUND	OC 1	809941N	
000 Cheque Book Reference		OPERATING FUND	OC 1	809941N	
0001 Current Building		OPERATING FUND	OC 1	809941N	
0000 Date		OPERATING FUND	OC 1	809941N	
0001		OPERATING FUND	OC 1	809941N	
0000 Description		OPERATING FUND	OC 1	809941N	
0000 Exta Details		OPERATING FUND	OC 1	809941N	
000! Extra Text		OPERATING FUND	OC 1	809941N	
0001 Fund Code		OPERATING FUND	OC 1	809941N	
000 Fund Name		OPERATING FUND	OC 1	809941N	
000: Hidden		OPERATING FUND	OC 1	809941N	
0000		OPERATING FUND	OC 1	809941N	
		OPERATING FUND	OC 1	809941N	
0001 Invoice Code		OPERATING FUND	OC 1	809941N	
000 Invoice Code Description	$\sim$	OPERATING FUND	OC 1	809941N	
000502	004	OPERATING FUND	OC 1	809941N	
000501	004	OPERATING FUND	OC 1	809941N	
000786	004	OPERATING FUND	OC 1	809941N	
000499	004	OPERATING FUND	OC 1	809941N	
000498	004	OPERATING FUND	OC 1	809941N	

#### 2.2 Local Transactions

Local Transactions search will replace Search Transactions for all transactions for the building.

Account Group buildings that are selected will automatically have Account Group Field available by default.

To access the new search, follow the below steps:

- 1. Select an Account Group building (for this example)
- 2. Navigate to Local Transactions
- 3. New Search will be available if permissions allow to select

Testing 5.6 Sql Server 5.6.92.17									
StrataMax									
	local ×								
	Menus								
	Accounting & Taxation > Reports								
	Creditors								
	LOCAL CREDITOR 0000 Master Chart 08200343 tor Invoices								
	Help								
	Search Help for 'local'								

- 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.

Sefre	ish Exp	port 🔨 Adva	anced											
Restrict	To 🚹 F	ield		c	ondition	Value								
Column	15	/ear Code	•	is	on	Specific	Dates	01/08/202	0 - 31/07/2021 •					
Sort Orc	-	Date	•	i	s on 💌	✓ Specific	Dates		•					
		Account Code	•	i	s equal to 🔹		• ×							
Advance	ed 📃 /	Account Group	×	i	equal to 🔹		• ×							
First 100	00 records di	splayed				_	-							
Batch No		Account Code	Account Group		Account Descriptio	n	Туре	Hidden	Amount	Invoice Code	Invoice Code Description	Description		
01	04/08/2020	08205065	OC 2				с	P	-135.30	18	Other	Floor Decals		
1	04/08/2020	1530602	OC 2				с	P	135.30	18	Other	08205065 - Co	mmitte	
1	04/08/2020	1530602	OC 2				1	P	-12.30			GST		
1	04/08/2020		OC 2				6	P	12.30			GST 1530602		
1	04/08/2020		OC 2				í –	P	-123.00			Trf Surplus/Def	ficit	
1	04/08/2020		OC 2				í.	P	123.00			Trf Surplus/Def		
2	04/08/2020		OC 2				C	P	-1.113.73		Other	Notice Board	nere	
2	04/08/2020		OC 2				c	p	1,113,73		Other	08204448 - Co	mmitte	
2	04/08/2020		OC 2				-	P	-101.25		Otilei	GST	minico	Ì
2	04/08/2020		OC 2				6	P	101.25			GST 1530602		
2	04/08/2020		OC 2 OC 2				6	P	-1.012.48					
2	04/08/2020		OC 2					P	-1,012,48			Trf Surplus/Def		
			OC 2				,	P			Other	Trf Surplus/Def		
3	03/08/2020						P	P	-30,000.00	18	Other	MELB INNER O		
3	03/08/2020		OC 1				J	P	30,000.00			Balancing entry	/	
3	03/08/2020		OC 1				J	r	2,727.27			GST		
3	03/08/2020		OC 1				J	P	-2,727.27			GST 10101		
3	03/08/2020		OC 1				J	P	27,272.73			Trf Surplus/Def		
3	03/08/2020		OC 1				J	P	-27,272.73			Trf Surplus/Def		
4	03/08/2020		OC 2				Ρ	P	-30,000.00	18	Other	MELB INNER O	IC2 AF	
4	03/08/2020		OC 2				J	P	30,000.00			Balancing entry	y	
4	03/08/2020	10102	OC 2				J	P	2,727.27			GST		
4	03/08/2020	06100002	OC 2				J	P	-2,727.27			GST 10102		
4	03/08/2020	40102	OC 2				J	P	27,272.73			Trf Surplus/Def	licit	
4	03/08/2020	00402	OC 2				J.	P	-27,272.73			Trf Surplus/Def		
5	05/08/2020		OC 2				Р	P	1,113,73			EFT Payment		
5	05/08/2020		OC 2				J.	P	-1,113.73			Balancing Entry	v	
ne .	05/00/2020	00005065	000				n		100.00			CET 0	·	

### 2.3 New Security permissions – Global and Local Transactions

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

Security	- 🗆 X
File Permissions For ×	Email ^
Name         renee.soderlund           BCMax         GLMax         DocMax	
Permissions     Menus     Global Transactions     Local Transactions	s aulene keet@maxsoft.com ctest@email.com
	lmin@bcm.com.au naria.green@maxsoft.com
	Paul.Beet@stratamax.com admin@bcm.com.au
transactions Filter Close	odney.barker@maxsoft.co }enee.Soderlund@stratam v
	Add User Close

**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.

💥 Configuration		_		$\times$
BingMail Settings				
Account ID	MAX70995			
Portal User	BCMAX-Upload-MAX70995			
Portal Password	******			
Global Setting: Changing this v Hold For Approval	vill affect all users			
Colour Model	Full colour			~
			Close	e

**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.