Release Notes – Version 5.6.93

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

StrataMax StrataCash TRATAPAY

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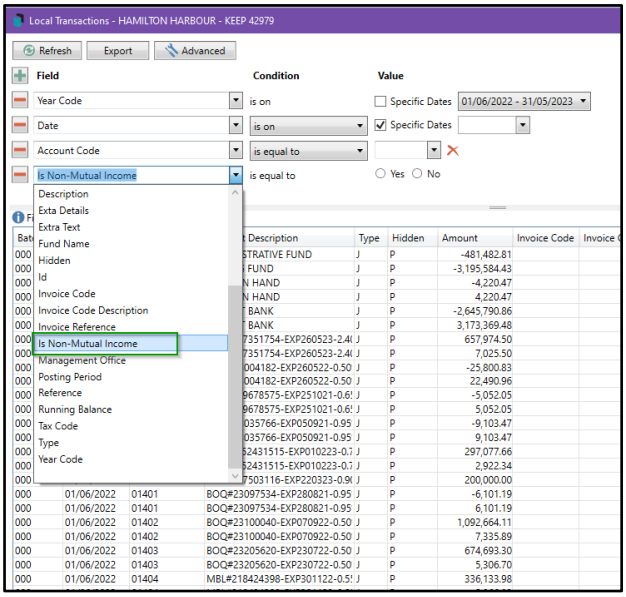
What's New

1. Transaction Search – Global and Local Transactions

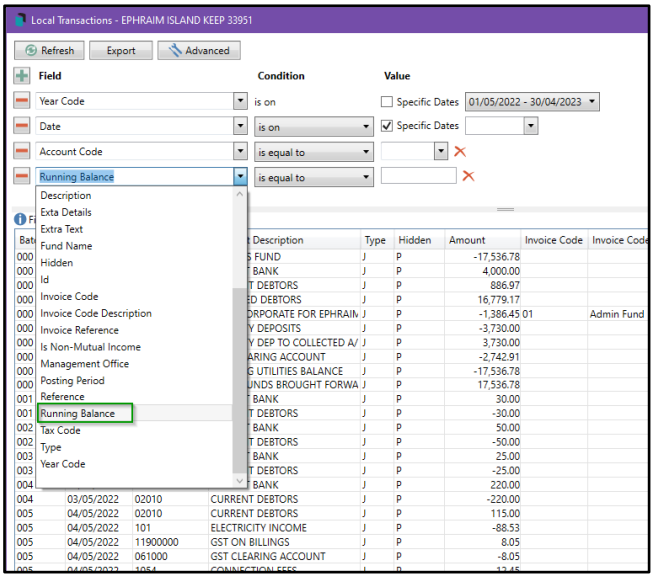
1.1 Non-Mutual Income

The 'Is Mutual Income' has been updated to report as 'Is Non-Mutual Income' now.



1.2 New Field – Running Balance

A new field, 'Running Balance', is now accessible, enabling users to search and generate running balance reports on the search similar to the old Transaction Search reports.



2. Strata Hub – Reporting

2.1 Annual Uploading

Annually, after entering the last Annual General Meeting data in Building Information, data can be uploaded to the Strata Hub Portal for individual buildings, those associated with a specific Account Manager, those with pending reports or all buildings. To access NSW Strata Hub in StrataMax, users must have access to Strata Hub.

To upload an individual building click on the Upload icon

To upload buildings based on Account Manager, select the Account Manager, and choose Upload All.

To upload buildings where the plan is due; tick 'Show plans where report is due' and then select Upload All. The buildings are identified based on whether the last report date is prior to the date in the Last AGM Date field in Building Information.

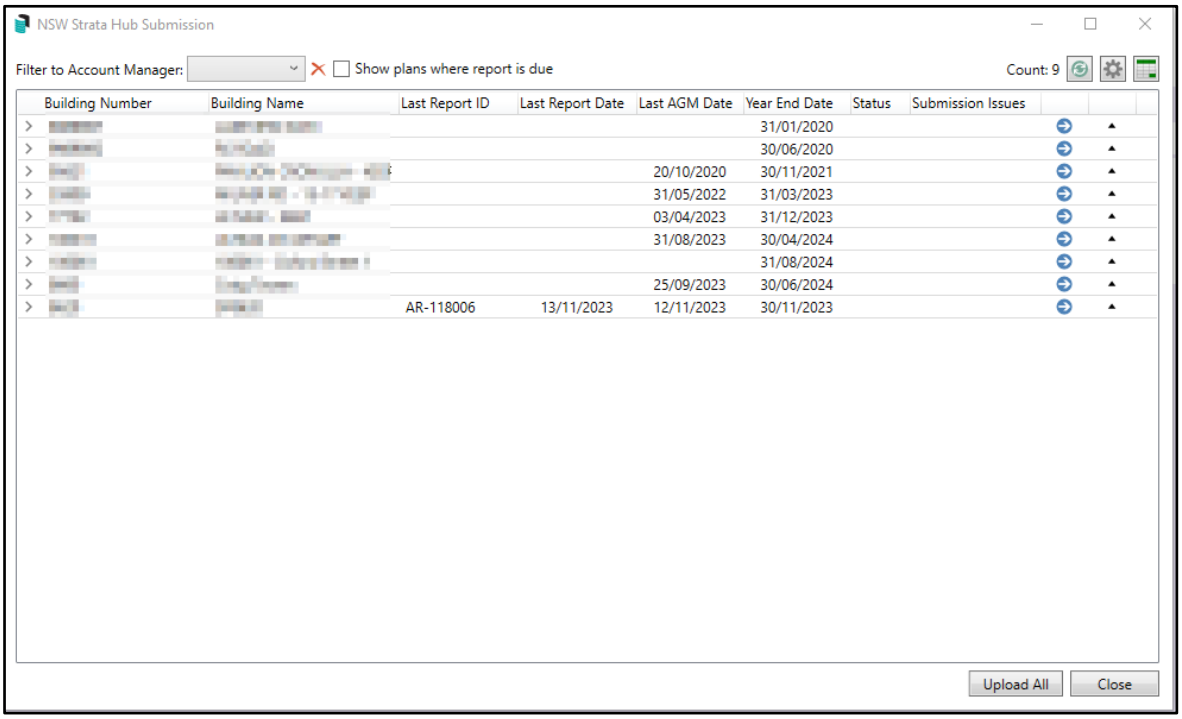
To upload all buildings; ensure no account manager is filtered and 'Show plans where report is due' is not ticked then select Upload All.

The building/buildings that upload successfully will have the 'Last Report ID' and' Last Report Date' populated and a tick in the 'Status column; moving the mouse cursor over the Last Report Date will identify the user that submitted the report. The field' Last NSW Scheme Report Date' in Building Information will also update automatically with the date of submission.

Buildings that cannot upload due to submission issues will have an explanation mark in the 'Status column' and the number of issues will be identified in the 'Submission Issues' column; click on the '>' icon next to the building to view details of the submission errors for that building or click the Excel icon to report the selected buildings to excel which will include details of each submission issue.

If the NSW Strata Hub is closed, when next opening the Strata Hub only the details of successful submissions will be visible. The user can attempt to upload the building again to view submission issues.

The refresh icon is available in case data in a building has been updated while the NSW Strata Hub form is open, clicking refresh is required to ensure the updated information is uploaded when a building/s is uploaded.



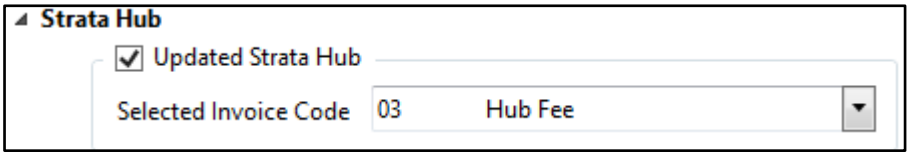
2.2 TRMax Disbursement Charges for Strata Hub Updates

Enhancements have been added to allow charges for Strata Hub Updates to be recorded and charged using TRMax Disbursements.

To setup charging for every Strata Hub update initiated from StrataMax use the 'Disbursements' menu. An invoice code will need to be setup in the GLMax company so it can be selected.

Once setup every time a StrataHub update is uploaded successfully to the StrataHub, a TRMax recovery will be created.

It is recommended to use Management Fee Setup for the annual charges.

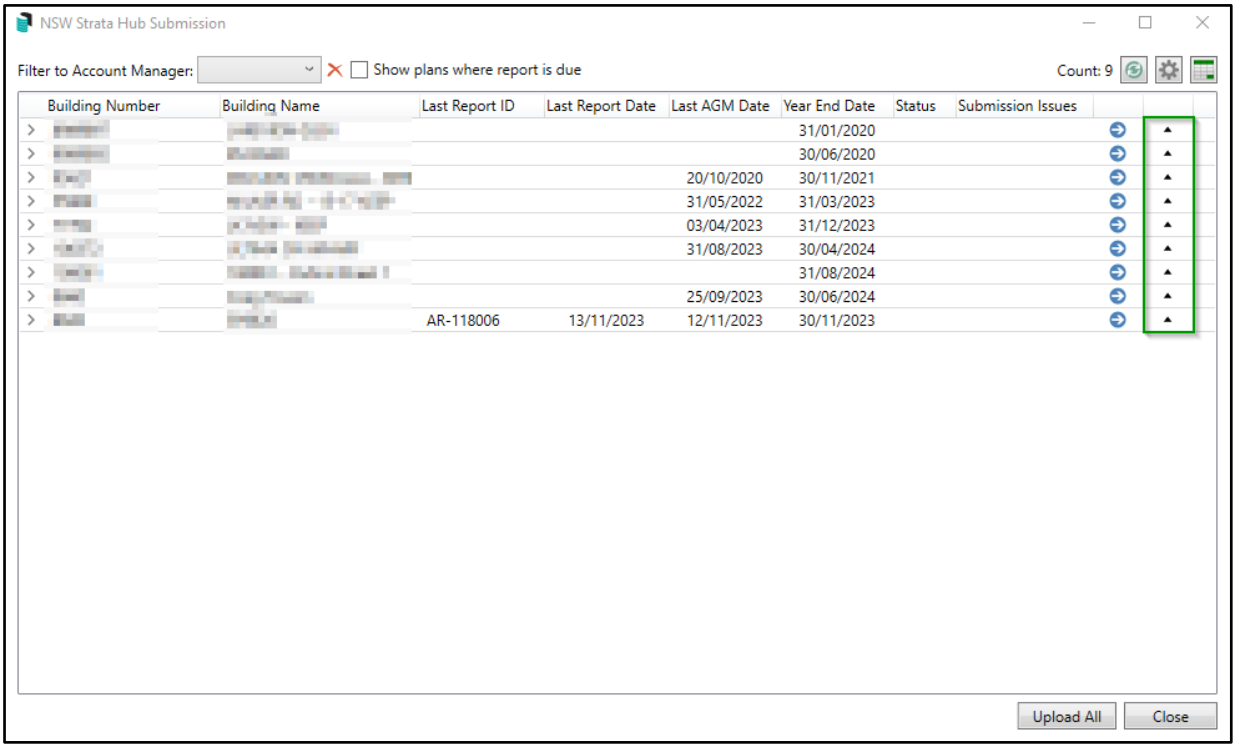


2.3 Update Current Strata Hub Report

To initiate a data update request for a finalised report, follow the below steps. This process will refresh information in the last report for any modified fields, excluding the AGM date.

Please Note – Strata Hub does not support AGM date changes through this method, as the AGM data is used to identify if a new annual report is to be created.

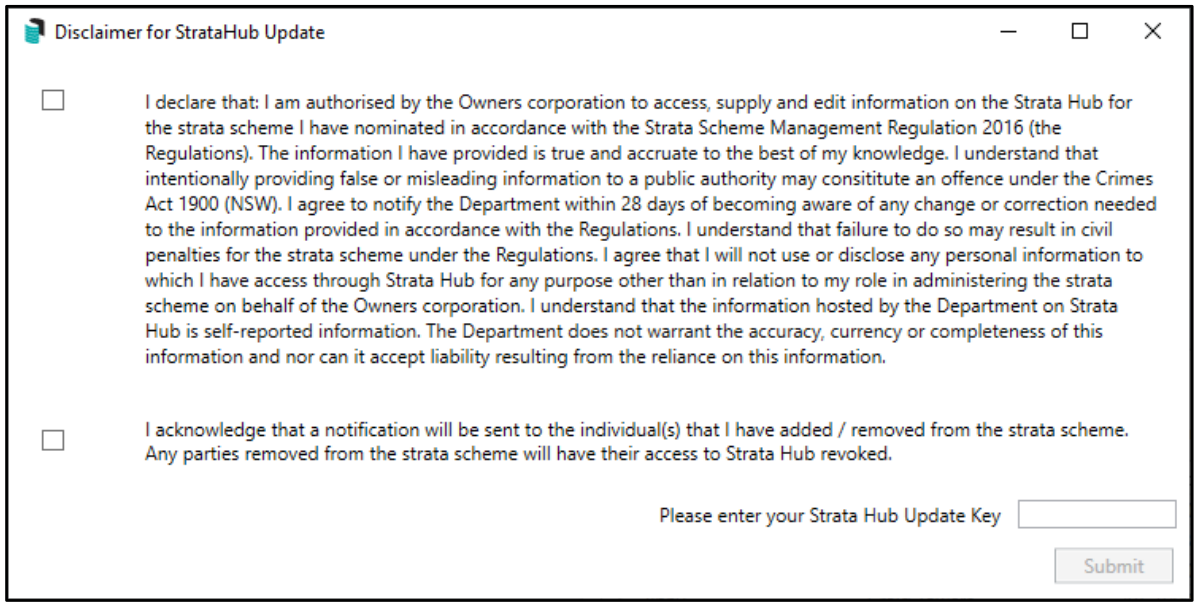
1. Update required data based on your requirements
2. Search or select 'NSW Strata Hub'
3. Click om the Update Current Report Icon



4. Tick the Required disclaimer boxes and enter your API Key that is available on the NSW Government's Strata Hub website within the Profile section.

   Note– The Key is different to the one used in the configuration for annual reports

5. Click 'Submit'



No additional actions are needed on the NSW Government Strata Hub websites for updates however to confirm updated information has been received you can log into the Strata Hub website, select the scheme, and select 'Audit History'

What's Better

- Invoice Hub Active filter now includes the year code restriction for accurate Old-Style Building list results.
- Report Distribution/ Ledger Card - with Style 'From Last Zero Balance' selected was crashing if the last Zero was a Year End Brought Forward, this has now been resolved.
- Merge Letters – now correctly sets PDF print orientation for landscape-oriented merge letters
- Levy Notices – LNOTE_208 and LNOTEMULTIOC_208 have had length restrictions removed on extended Lot/Unit number outputs.
- GLMax - EFT References will no longer list buildings instead of GLMax Companies.
- Communication -When composing an email, the Email server shows offline for sites where the database is in a different time zone to their machine, this has now been resolved.
- Roll Confirmation Report - If Agent/Tenant/Mortgagee has a Retired Contact as First Agent/Tenant/Mortgagee it was displaying none on the report. This has now been resolved
- 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)". Other changes have also been made when moving across to a new style template:

    - Moved "Secretary Address" and "Secretary Phone" into Info Editor and shows instead of actual address
    - Fixed showing other levies
    - Fixed showing other custom text fields

    Please note - Minimum version to see these changes is 5.6.93 and edit before print is no longer available on any new certificates.