

# Release Notes – Version 5.6.98

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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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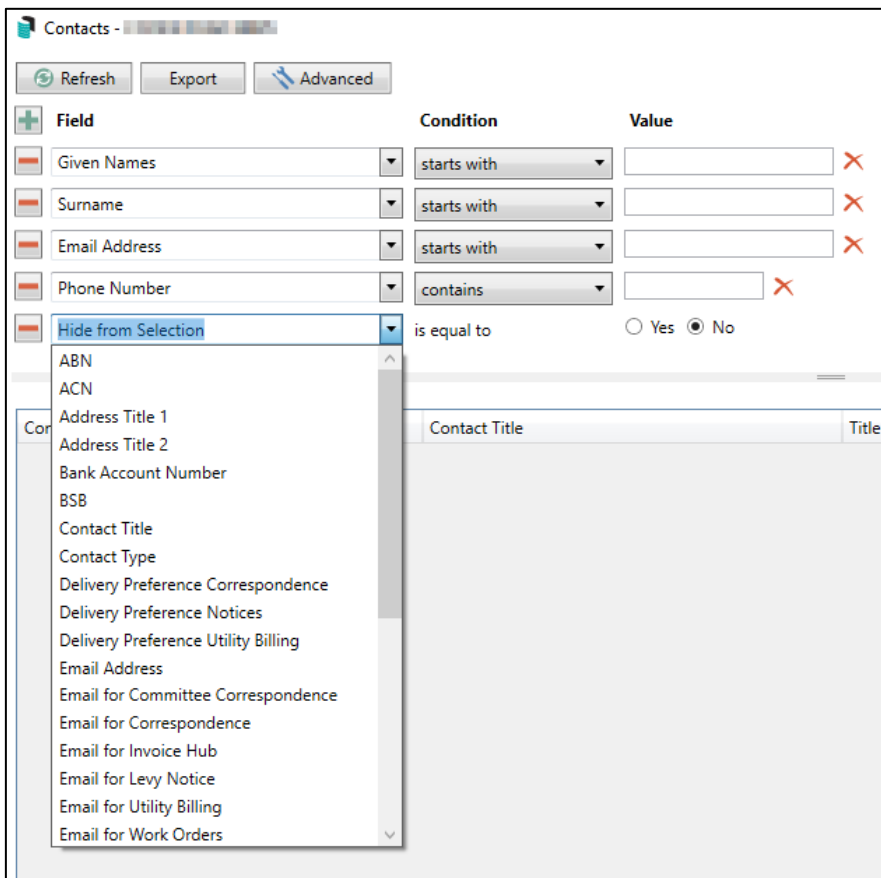
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# What's New

## 1. Search Contacts

A new search function has been added to simplify searching for contacts. The search allows for filtering using multiple contact fields and will search across all buildings. Type 'Search Contacts' into the BCMMax desktop search and click to open and use this feature.



## 2. API Enhancements

### 2.1 Office Bearers

Contact ID has been added to the Office bearers table to identify which specific contact from a lot is the Office Bearer.

### 3. Save Searches as Dashboards

Enhancements have been made to 'Saved Searches' to enable a user to flag a particular search to be viewed on the individual user's dashboard.

An Additional option 'Add To My Dashboard' has been added to the following Saved Searches:

- Search Bank Accounts
- Search Creditor Invoice Items
- Search Work Order
- Search Quotes
- Search Building
- Search Inspections
- Search Levies
- Management Fees Report

The new option will allow users to add an item to their dashboard linked to a saved search configuration. Once added, the dashboard can be edited or removed from either the saved search configuration or from the dashboard management.

To create a 'Saved Search' on a user's dashboard follow the below steps:

1. Navigate to 'Search Buildings' for example
2. Set criteria for the search you want to save as a 'Saved Search' or load an existing Saved Search

Field	Condition	Value
Building Name	starts with	
State	is equal to	QLD

3. Click on 'Save Search As'
4. Enter all the Saved Search details
5. Click on 'Add To My Dashboard'

Name: Renee Test Levy 00006

Available to current user only

Available to users in a security group

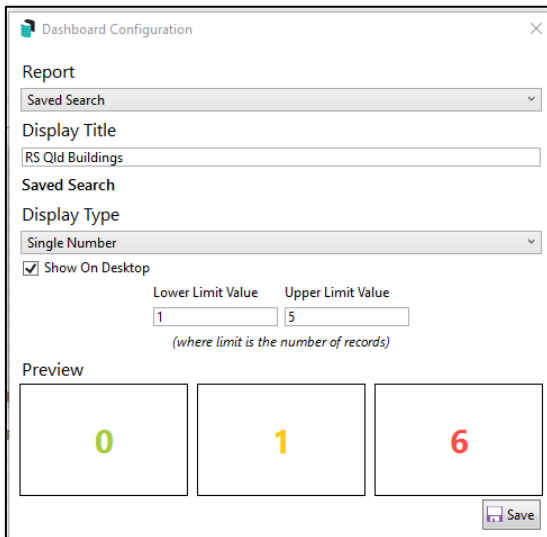
Available to all users

Save as default

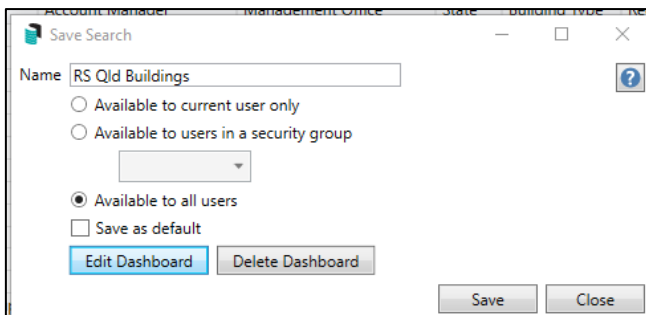
**Add To My Dashboard**

Save Close

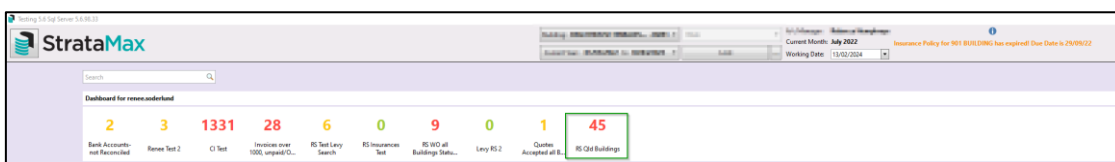
6. Dashboard Configurations will appear which is the same as what users would see via the ‘Dashboard Management’
7. Saved Search will be the defaulted Report (which cannot be changed)
8. Display Title for the user’s dashboard can be changed, it will populate the Saved Search title
9. Enter the Display type and Limits



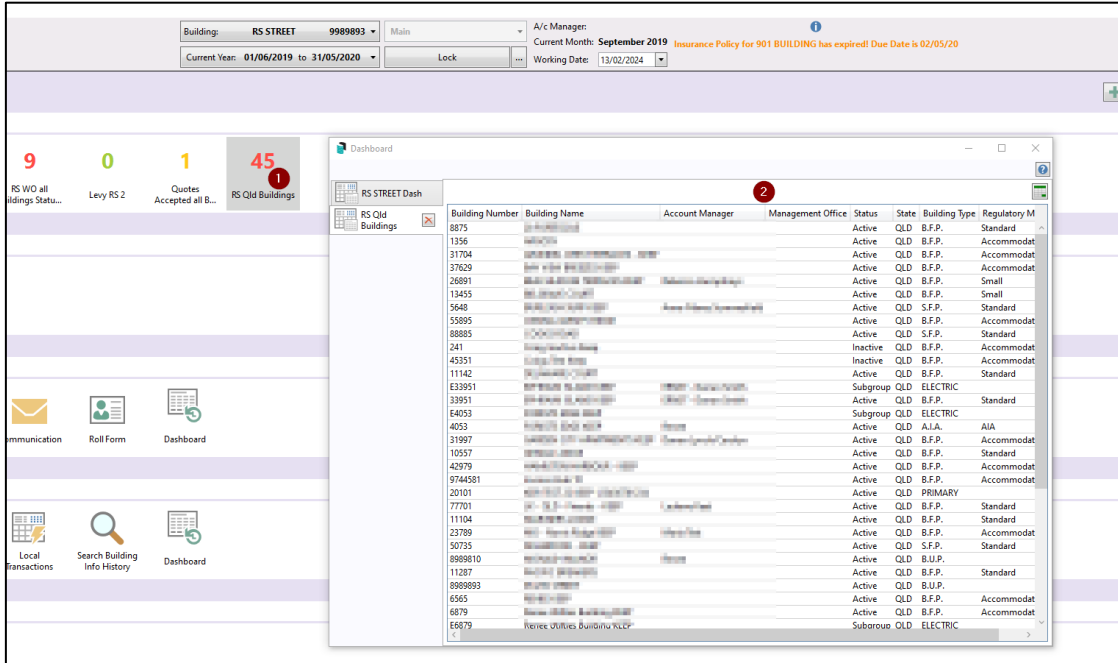
10. Click on Save
11. ‘Edit Dashboard’ and Delete Dashboard’ will now appear on the selected Save Search



12. Click Save and Close
13. The Saved Search will now appear on the user’s dashboard

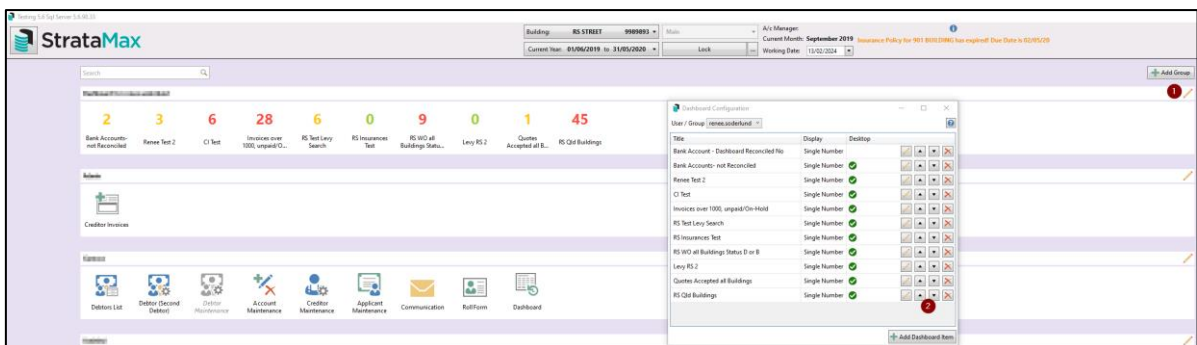


14. To view the saved search, click on the saved search from the desktop
15. The Dashboard results will be displayed, which will match the results from the saved search via the search module

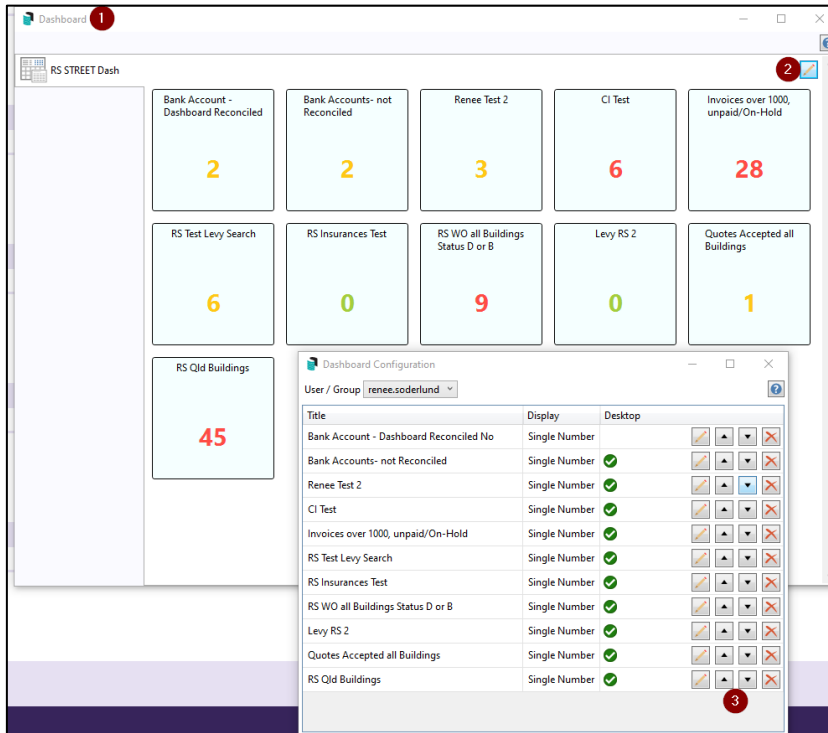


14, Saved Search configurations can be edited, and searches removed from showing via Desktop, Dashboard, or the individual Saved Search in the search module.

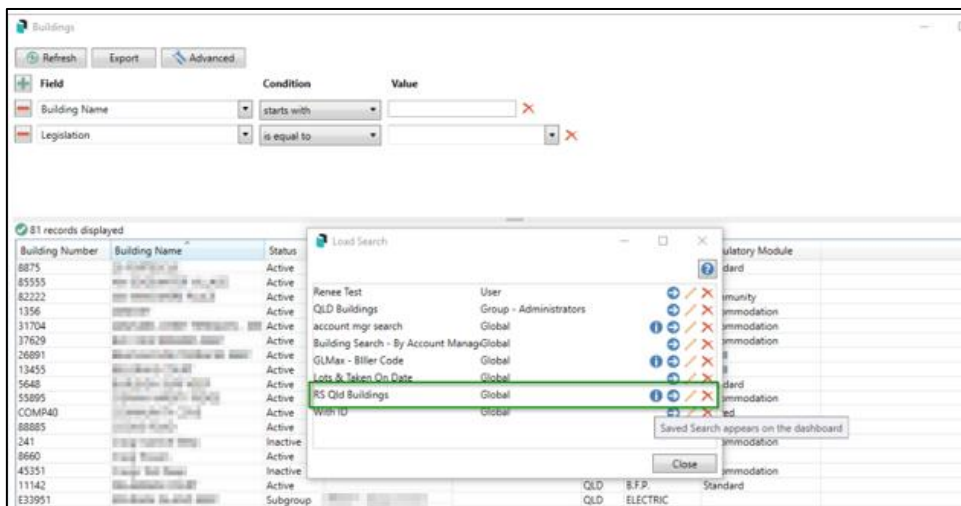
Example of Editing or Deleting via the Saved Search on the desktop:



### Example of Editing or Deleting Via 'Dashboard'



### Example of Editing/Deleting from a Saved Search:



**i** indicates that a Saved Search appears on the Dashboard

**Important Note** – a dashboard generated from a search is just for the user who clicked the 'create dashboard' button, therefore users will not see other saved searches that other users may have selected 'Add to my Dashboard' for.

# What's Better

- Merge Letters – Saving Report to DocMax Profile was receiving an unknown error crash. This has now been resolved.
- Voting Register – Power of Attorney will now report successfully on the Voting Register when the Lot has two contacts.
- Searches – Date and Time will now report on the searches e.g. – Log View and Distribution Viewer
- Report Distribution – Sub Group Building Selection was showing main buildings. Subgroup buildings will now be displayed when run from a Subgroup.
- Additional Trading Fund 2 - Account Codes Validation Issue was occurring when a second trading fund account was added. This is now validating correctly.
- Roll History – Last item in List (retrieved from RollOwnership) will always show Change Type =Transfer. This has now been resolved. If an 'Edit' has been conducted the 'Type' in the 'View History' log will now report as Type = Change of Ownership.
- Building Renumber – Error was occurring when re-numbering a building. This has now been resolved.
- Report Distribution – when saving to DocMax with a profile, the title and description will no longer be ignored.
- Report Distribution Logs – Viewing documents in the log was not working as expected. This has now been resolved.
- Report Distribution – Tray selections were getting overwritten if printing multiple report types. This has now been resolved.
- Change of ownership – Linked Lots – In some scenarios, the order of linked lots was reversed, and this was causing an error on change of ownership. This has been resolved