

Release Notes – Version 5.6.112

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. Search Insurance Claims

1.1 Search Insurance Claims

Search Insurance Claims is a new search which has been added to make it easier to monitor insurance claims entered into the Insurance Claims register.

Type Search Insurance Claims into the BCMax Desktop search and click to open.



The search will default to the current building when opened but can be run globally by removing the current building restriction.

The screenshot shows the 'Search Insurance Claims - 24 DEPPER STREET 2506' window. It includes a table with the following data:

Field	Condition	Value
Current Building		

2 records displayed

Building Number	Building Name	Incident Date	Claim Number	Reference Name	Date Lodged	Insurance Code	Insurance Type	Insurer	Insurers Reference	Insurance Policy Num
2506		29/05/2024	00000002	TEST NOT LODGED		904	PUBLIC LIABILIT	CHU		
2506		01/04/2024	00000001	TEST CLAIM	01/05/2024	901	BUILDING	CHUBB	12345	11111

Examples of useful saved searches include:

- Claims not lodged – based off Date Claim Lodged field if it is empty; set based on number of days since the Date of Incident field.
- Claims not finalised – based off date paid/finalised field if it is empty; set based on number of days since the date claim lodged field.

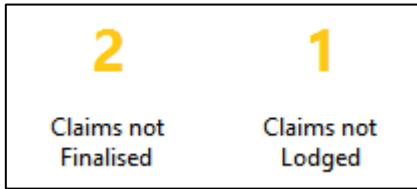
Information entered into the Insurance Claims register can be filtered for searches using the fields below.

Account Manager
Amount Claimed
Amount Paid
Brief Details
Building Name
Building Number
Building Number Alternate
Claim Number
Current Building
Date Lodged
Date Paid
Excess
Excess Paid By
Incident Date
Insurance Code
Insurance Policy Number
Insurance Type
Insurer
Insurers Reference
Management Office
Other Policy Details
Police Event Number
Police Notified Date
Police Officer Name
Police Station
Property Owner
Reference Name
Remarks
Third Party
What Happened

Search results can then be exported to Excel by clicking the Export button.

1.2 Search Insurance Claims Dashboard Items

Dashboard items can be created based on Saved Searches for Current Building and / or All Buildings. For example, the searches above can be added as Dashboard items

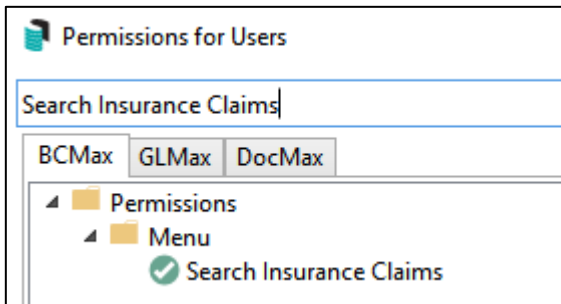


Dashboard									
CLAIMS TESTING Dash									
Claims not Finalised	Building Number	Building Name	Account Manager	Management Office	Incident Date	Claim Number	Reference Name	Date Lodged	Insuranc
	2506	CLAIMS TESTING			29/05/24	00000002	TEST NOT LODGED		904
	2506	CLAIMS TESTING			01/04/24	00000001	TEST CLAIM	01/05/24	901

Search results from the Dashboard can also be exported to Excel by clicking the Export icon.

1.3 Search Insurance Claims – Security Setup

A new security control has been added to manage access to Search Insurance Claims. Navigate to Security Setup, right click the User or User Group, select Edit Permissions and type 'Search Insurance Claims' into the filter to review permissions for the search.



2. Data Health – Option to remove historical financial years

A new option has been added to the Data Health Dashboard to allow clients to manage how many historical financial years of data they would like to keep.

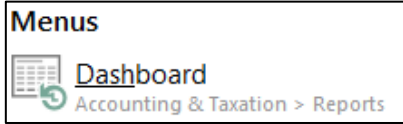
A new field has been added to the configuration under the 'Financial' header called 'No. of years to keep historical financial data.'

Please Note – Minimum number of years field can be set to is 7 and this will be the default if not set.

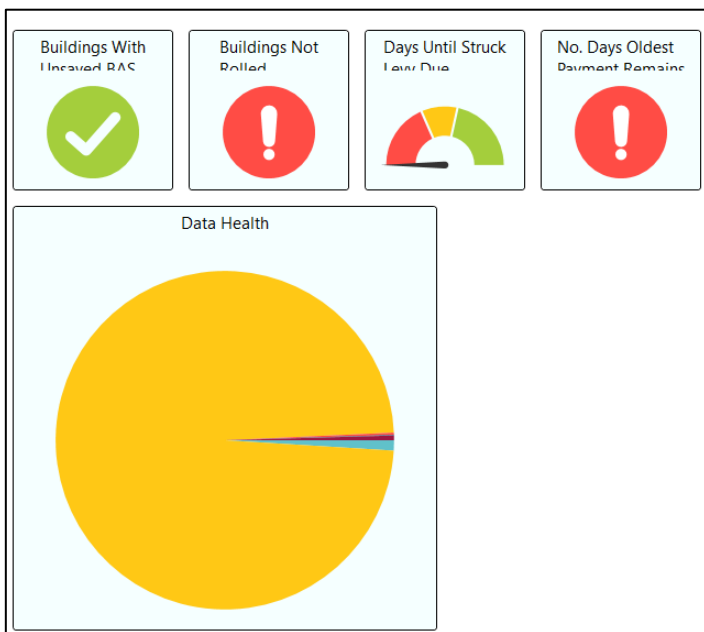
This new Configuration setting is a global setting.

To set this configuration follow the below steps:

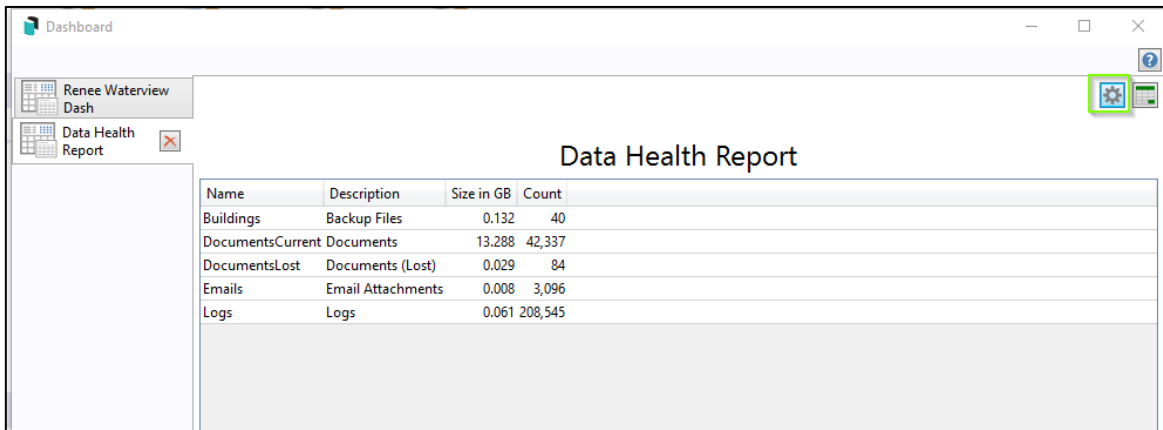
- Navigate to Dashboard menu option



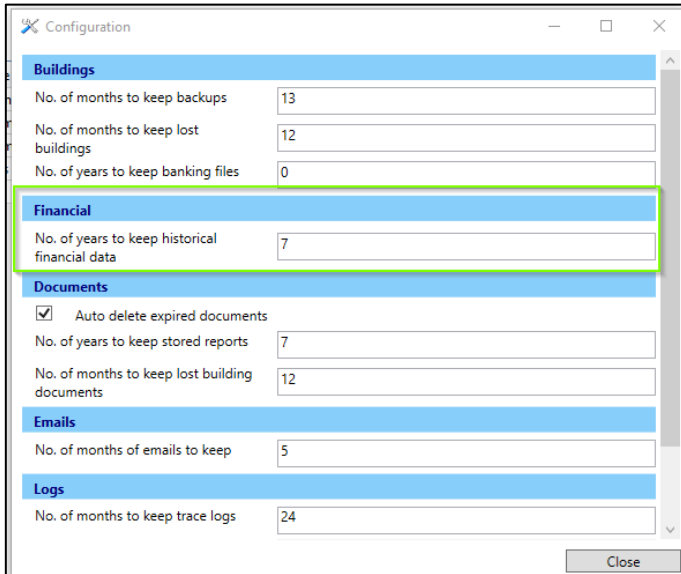
- Click on Data Health (if not available will need to be added)



- Click on Data Health to open,
- When Data Health Report is displayed select the cog to view Configuration settings



- Enter the number of years of financial data to be saved.



3. Search Creditor Invoice Items – Invoice Hub Status

Search Creditor Invoice Items has been updated to include a new column/search, titled Invoice Hub Status. This allows clients to search for invoices with the following status.

- Approved
- Not Uploaded
- Retracted
- Uploaded

Search Creditor Invoice Items -

Refresh Export Advanced

Restrict To **Field** **Condition** **Value**

Columns Invoice Hub Status is equal to

Sort Order

Advanced

First 10000 records displayed

Reference	Invoice Date	Invoice Amoun	Invoice Hub Status	Invoice Number	Creditor Code
D0000814	18/05/2024	20.00	Not Uploaded	121212	08200159
D0000005	13/05/2024	20.00	Not Uploaded	111	08200337
D0000002	30/06/2023	2,000.00	Not Uploaded	testing	08200464
D0000006	25/08/2019	1,985.41	Not Uploaded	926446	08200255
D0000806	27/05/2024	22.22	Not Uploaded		08200461
D0000013	15/05/2024	10.00	Not Uploaded	LK2222	08200338
D0000811	27/05/2024	800.00	Not Uploaded	7895412	08200457
D0000015	09/08/2019	1,026.41	Not Uploaded	152139	08200257
D0000816	18/05/2024	10,687.00	Not Uploaded	141414	08200460

4. Dashboard – No. Days Oldest payment remains Unpresented (cheque only)

4.1 New Configuration option

The No. Days Oldest Payment Remains Unpresented (cheque only) has been updated to include a new tick box called 'Show only unprinted' to only show unprinted cheques.

To access this setting:

- Navigate to the Dashboard Configuration
- Select the Edit Pencil

Dashboard Configuration

User / Group Administrators

Title	Display	Desktop	
Total Income Per Account Manager	Pie		[Edit] [Up] [Down] [Close]
Buildings With Unsaved BAS	Traffic Light	<input checked="" type="checkbox"/>	[Edit] [Up] [Down] [Close]
Buildings Not Rolled	Traffic Light	<input checked="" type="checkbox"/>	[Edit] [Up] [Down] [Close]
Days Until Struck Levy Due	Radial Gauge Low High	<input checked="" type="checkbox"/>	[Edit] [Up] [Down] [Close]
No. Days Oldest Payment Remains Unpresentec	Traffic Light	<input checked="" type="checkbox"/>	[Edit] [Up] [Down] [Close]
Roll Submissions	Single Number	<input checked="" type="checkbox"/>	[Edit] [Up] [Down] [Close]
Days Until Insurance Due to Expire	Traffic Light	<input checked="" type="checkbox"/>	[Edit] [Up] [Down] [Close]
No. Days Oldest Payment Remains Unpresentec	Traffic Light	<input checked="" type="checkbox"/>	[Edit] [Up] [Down] [Close]

+ Add Dashboard Item

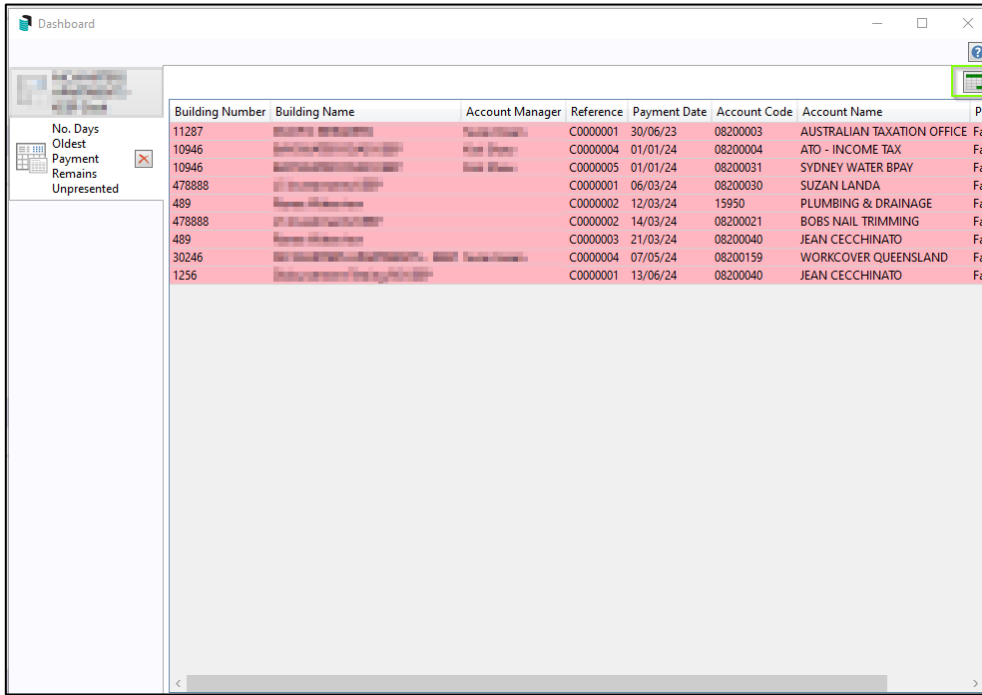
- Select the new Options shown below

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

- Report:** No. Days Oldest Payment Remains Unpresented
- Display Title:** No. Days Oldest Payment Remains Unpresented
- Number of days the oldest payment has been unpresented:** (highlighted in green)
 - For Cheques
 - Show only unprinted
- Filter Buildings:** All Active Buildings
- Management Office Filter Buildings Value:** (empty)
- Display Type:** Traffic Light
- Show On Desktop
- Lower Limit Value:** 30
- Upper Limit Value:** 45
- (where limit is the number of days the oldest payment has been unpresented)*
- Preview:** Three icons: a green checkmark, a yellow warning triangle, and a red exclamation mark.
- Save:** A button with a floppy disk icon.

4.2 Report output to Excel

No. Days Oldest Payment Remains unpresented can now be outputted to excel. Click on the Dashboard option and click on the Excel option.

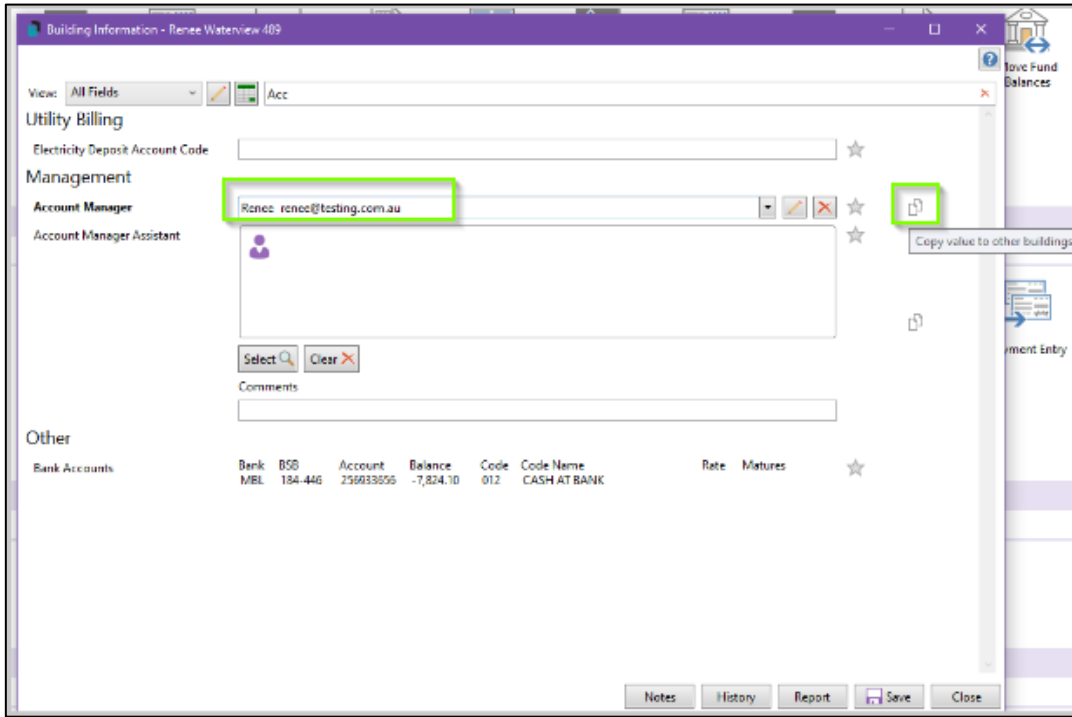


Building Number	Building Name	Account Manager	Reference	Payment Date	Account Code	Account Name	Printed or Emailed
11287	Australian Taxation Office	Janine Green	C0000001	30/06/2023	08200003	AUSTRALIAN TAXATION OFFICE	False
10946	ATO - INCOME TAX	Janine Green	C0000004	1/01/2024	08200004	ATO - INCOME TAX	False
10946	SYDNEY WATER BPAY	Janine Green	C0000005	1/01/2024	08200031	SYDNEY WATER BPAY	False
478888	SUZAN LANDA	Janine Green	C0000001	6/03/2024	08200030	SUZAN LANDA	False
489	PLUMBING & DRAINAGE	Janine Green	C0000002	12/03/2024	15950	PLUMBING & DRAINAGE	False
478888	BOBS NAIL TRIMMING	Janine Green	C0000002	14/03/2024	08200021	BOBS NAIL TRIMMING	False
489	JEAN CECCHINATO	Janine Green	C0000003	21/03/2024	08200040	JEAN CECCHINATO	False
30246	WORKCOVER QUEENSLAND	Janine Green	C0000004	7/05/2024	08200159	WORKCOVER QUEENSLAND	False
1256	JEAN CECCHINATO	Janine Green	C0000001	13/06/2024	08200040	JEAN CECCHINATO	False

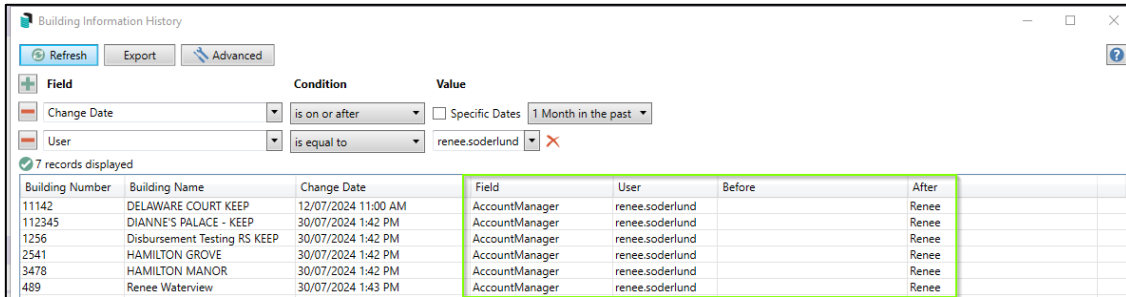
5. Account Manager – Logging

When Account Manager is copied to Other Buildings from Building Information the system will now log the changes made.

- Navigate to Building Information
- Search for Account Manager fields
- Enter or Change the Account Manager
- Select the Copy Value to other buildings (shown below)



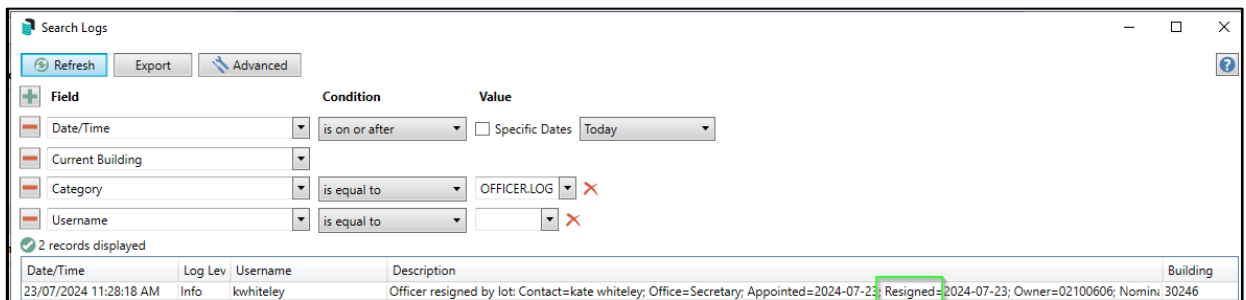
- Select buildings that need to be updated to the same Account Manager
- Click Save
- The Logs will now reflect the Account Manager changes



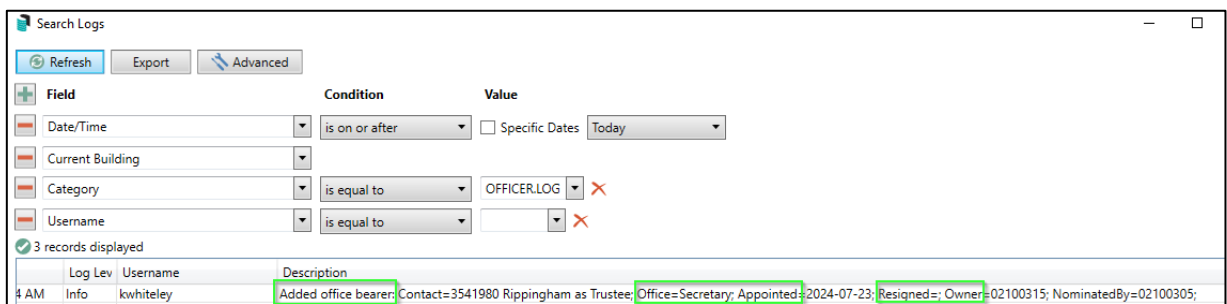
6. Roll – Change of Ownership

When a Change Of Ownership is carried out and the officer is resigned via the Roll the system will now add a log for selections made.

Change of Ownership – Resigning Office Bearer

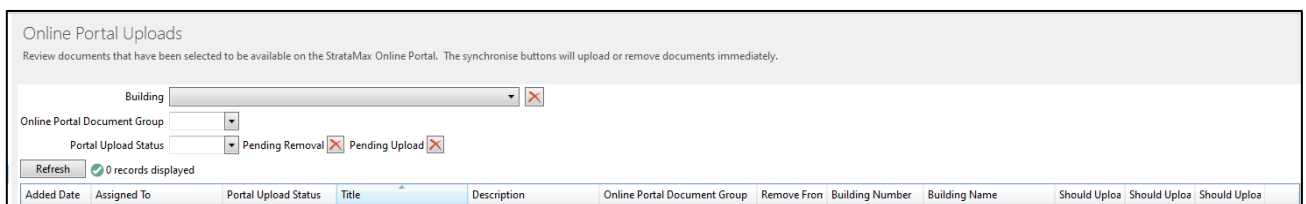


Change of Ownership – Skip the step to Resign Office Bearer



7. DocMax – Synchronise All and Synchronise Selection

DocMax Online Portal Uploads screen the ‘Synchronise All’ and ‘Synchronise Selection’ buttons have been removed as these operations are now automated.

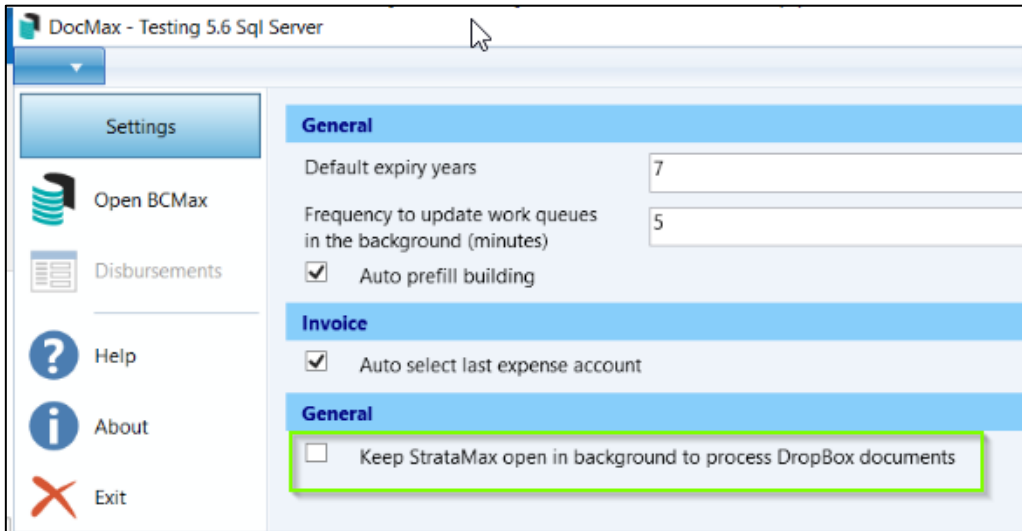


8. DocMax – Setting/Tick Box for DropBox Documents

A new tick box has been added in DocMax to keep the StrataMax icon open in the Windows system tray.

This will provide a more stable experience for users who have an active DocMax DropBox enabled and running.

This tick box can be found in DocMax > Settings, and under a new heading called 'General'.



What's Better

- Invoice Hub – Building status was not reported when getting the last upload date of a building, these will now report values Active, Uploading, Not Found and Inactive.
- Saved Search – When exporting search data which contains an empty criteria an error was being returned. This has been resolved
- Roll – When saving correspondence preferences, the save button will now be disabled if there are errors when the system is saving or loading data.
- Account Maintenance – Allow saving an account after setting the system flag.
- Creditor Maintenance – if there was already a tax creditor in the building and another tax creditor was added from the master chart the system would crash. This will no longer crash but return a new validation message to alert the user.
- Creditor Invoice Entry – Issue resolved when viewing a new document in creditor invoices
- Local Transactions/Change Transaction option – will no longer allow change code from historic years