Release Notes – Version 5.6.119

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

What's New 3
1. Proxy Contacts and Proxy Manager UI changes 3
1.1 Adding a Proxy in the Roll 3
1.2 Edit a Proxy in the Roll 5
1.3 Terminate a Proxy 5
1.4 Proxy Manager – Report Distribution 6
1.5 Proxy Manager Security 7
What's Better 9

What's New

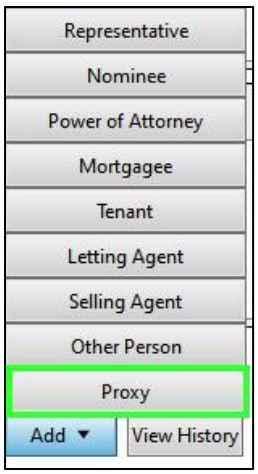
1. Proxy Contacts and Proxy Manager UI changes

On upgrade to V5.6.119, Proxy data stored in Proxy Manager will be imported into the Roll. Contact cards will be created for each proxy and new proxy contacts will be added and set up through the Roll.

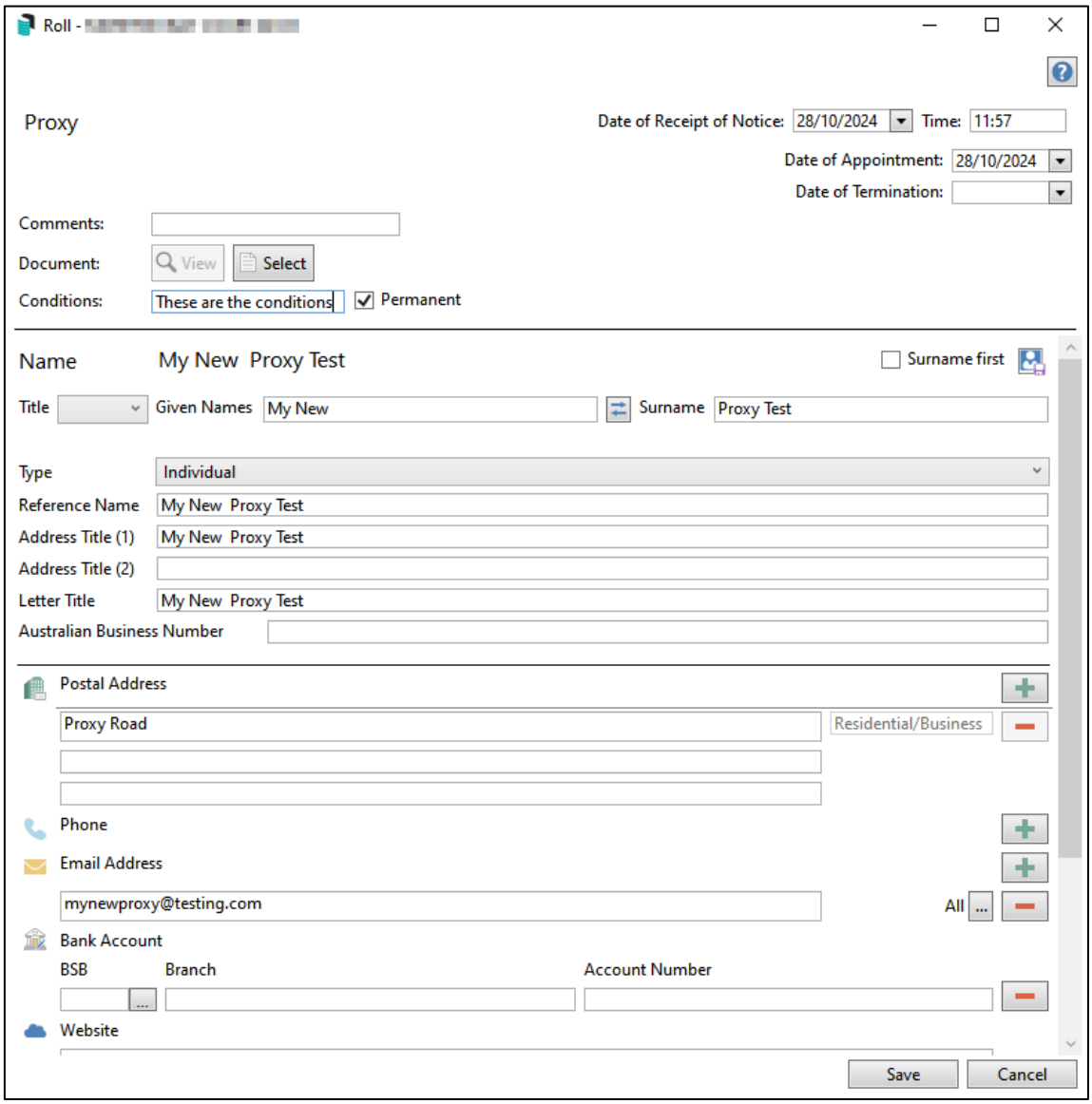
1.1 Adding a Proxy in the Roll

The ability to set up a new Proxy has been added to the Roll / Add function.

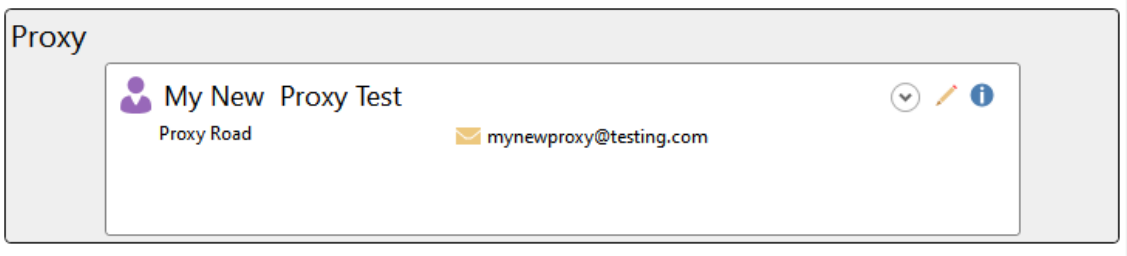
- Navigate to the Roll
- Select the Lot Account that requires a new proxy
- Click Add
- Click Proxy



- Add the Proxy Name and other details
- Set the Appointment Date
- Set a Termination Date if Required
- Set if position is permanent by ticking the 'Permanent' checkbox
- Add Comments and/or conditions if required
- Click Save to save the record



Once saved the Proxy will be displayed in the Roll as a Roll Position contact.

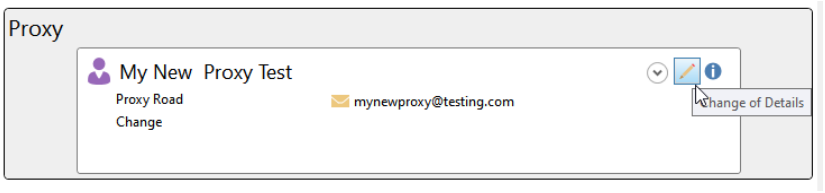


1.2 Edit a Proxy in the Roll

Proxy contacts can be edited or updated in the same way as other Roll contacts.

1.2.1 Change of Details

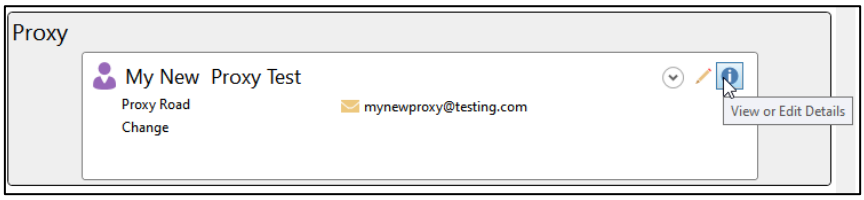
Click the Change of Details pencil icon to open the contact details screen.



Make any required changes and save.

1.2.2 Edit Details

Click the View or Edit Details to open the contact card.

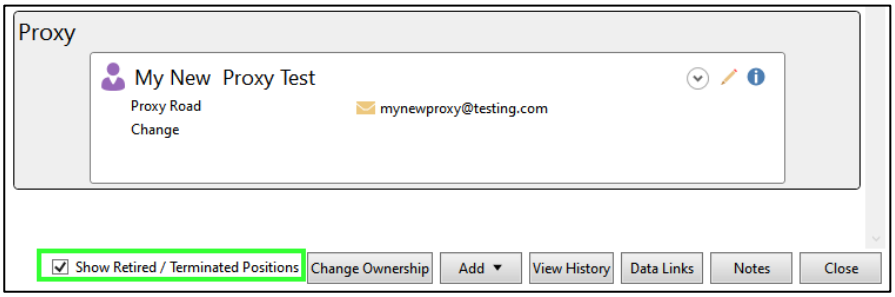


Make any required changes and save.

1.3 Terminate a Proxy

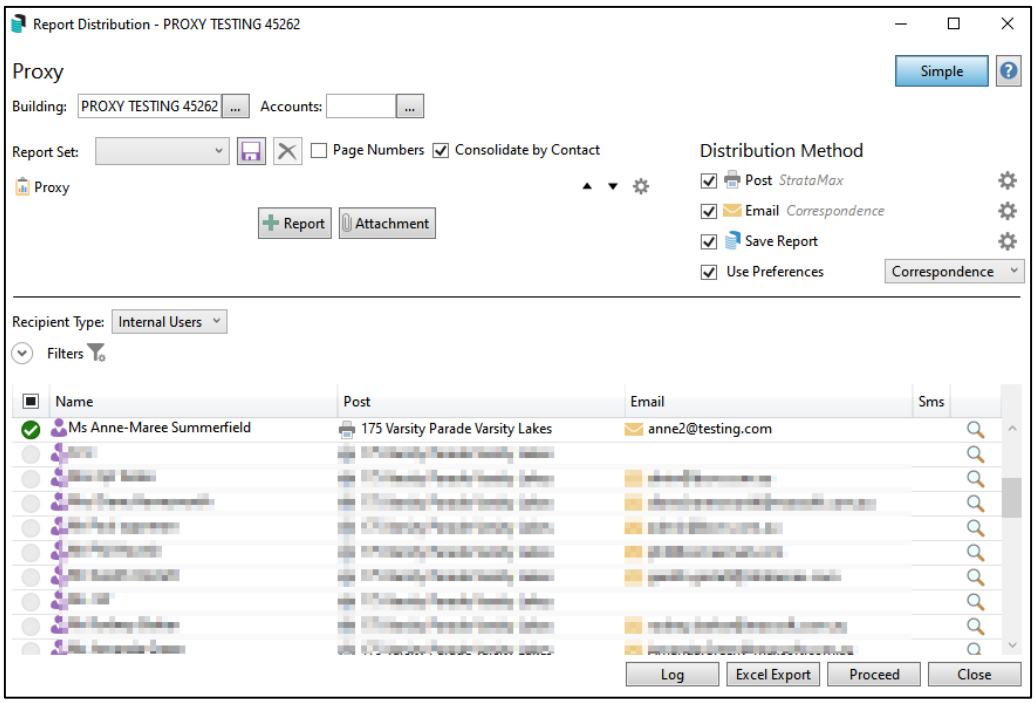
A proxy can be terminated by clicking the Change of Details icon, add a Date of Termination and Click Save.

Once the termination date is reached, the proxy will be retired and no longer displayed on the Roll screen. The proxy contact details can be reviewed after expiry by ticking the 'Show Retired / Terminated Positions' checkbox.

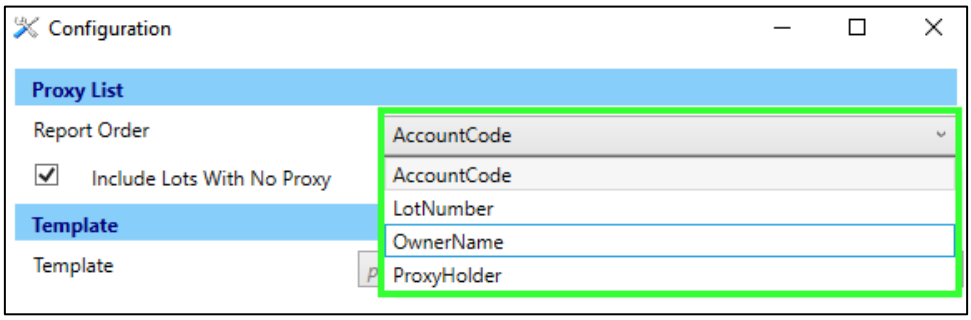


1.4 Proxy Manager – Report Distribution

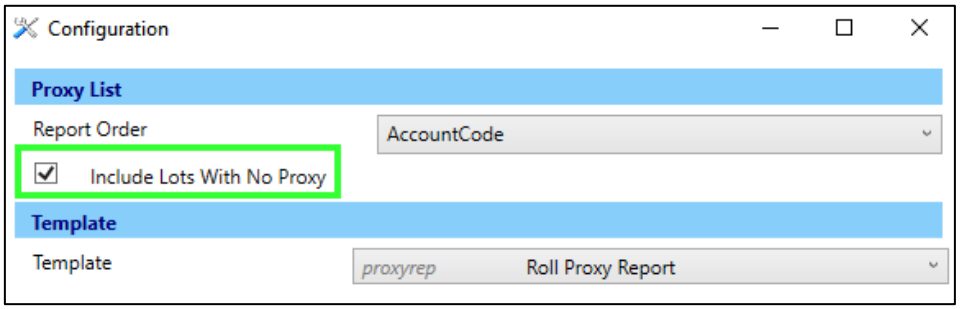
Opening Proxy manager will now present the Proxy / Nominee Report in Report Distribution mode. Recipient Type will default to Internal User.



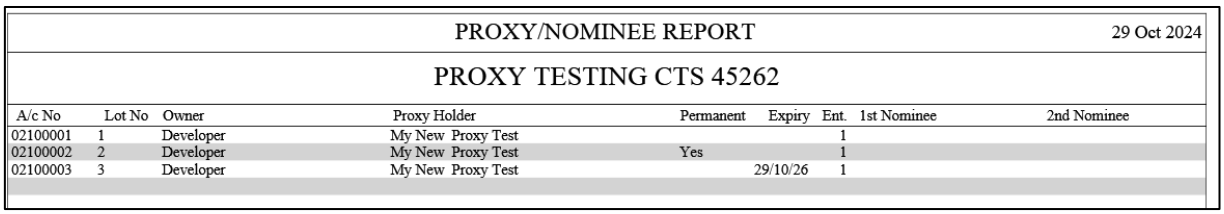
Click the configuration cog to set report order options.



Tick 'Include Lots with No Proxy' to include all lots in the report.



Tag the relevant recipient if required and click Proceed to generate the Report.

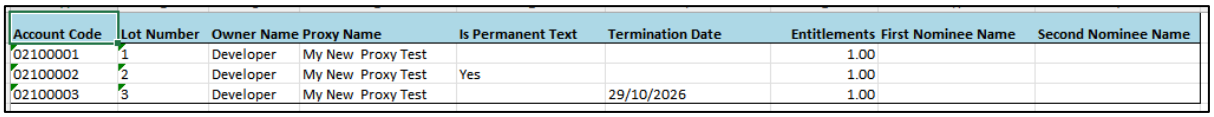


PROXY/NOMINEE REPORT 29 Oct 2024

PROXY TESTING CTS 45262

A/c No	Lot No	Owner	Proxy Holder	Permanent	Expiry	Ent.	1st Nominee	2nd Nominee
02100001	1	Developer	My New Proxy Test			1		
02100002	2	Developer	My New Proxy Test	Yes		1		
02100003	3	Developer	My New Proxy Test		29/10/26	1		

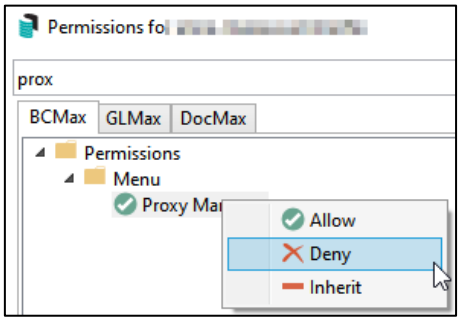
Click Excel to report the report to Excel



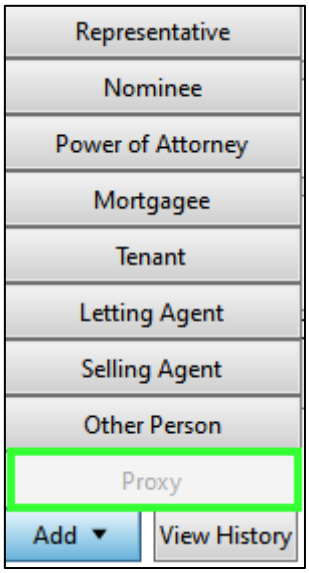
Account Code	Lot Number	Owner Name	Proxy Name	Is Permanent Text	Termination Date	Entitlements	First Nominee Name	Second Nominee Name
02100001	1	Developer	My New Proxy Test			1.00		
02100002	2	Developer	My New Proxy Test	Yes		1.00		
02100003	3	Developer	My New Proxy Test		29/10/2026	1.00		

1.5 Proxy Manager Security

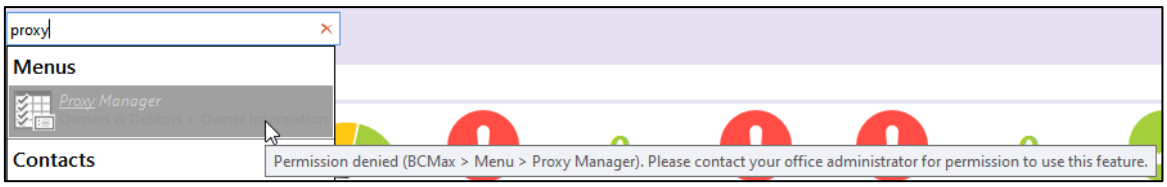
Security settings for adding and editing proxy data and running the Proxy report are unchanged. Navigate to Security setup and use the filter to search for 'Proxy Manager' to review the permissions.



If set to Deny, access to add a proxy in the Roll will not be available.



If set to Deny, access to Proxy Manager (Report) will not be available.



Note: Any permissions currently set will be retained on upgrade to this version.

What's Better

- EFT Manager – When selecting the history option to launch the account history the system was not returning the creditor information as the status column was the incorrect type. This has now been corrected.
- Financials - Lot Budget Summary - Account code (Lot number) was not in numerical order. This has now been resolved.
- Creditor Maintenance - Master Chart - Creditor Compare should only delete creditors that have had no activity when 'Delete where possible' is selected.
- Account Selection List - The Account Selection List will now reflect a 0.00 instead of a blank for Lot accounts that have had no recent transactions
- A new filter has been added to the Local Transactions search to allow users to search and include the 'Levy Number.'
- Financial Statements - When output to Excel is selected in Financial Statements clicking Proceed auto selects Printer and prints the report. This is resolved and if Excel is selected the report will no longer print.
- Unpaid Creditor Invoices Report - Summary Report and Excel output has been corrected
- Creditor Management – Edit Creditor option button was slightly cut off on the user interface. This has now been resolved.
- Building Information / Meetings - Add New folder Location button was not working if clicked to the right of the text.
- Invoice Hub - Flag historical year invoices in Invoice Hub as invalid to upload
- Change Code – Validation has been reimplemented to prevent changing codes across different funds
- Change Transaction Code – Invoices and Transactions that are generated via Process Recoveries and Management Fees in GLMax can now be selected to run Change Transaction Code in BCMax.
- Subgroup - When creating an invoice in a utility subgroup the Tax Code was being overridden and set to "Not Included In BAS". This caused invoices to skip the GST calculation, and no GST was showing incorrectly on invoices
- Report Distribution – Saved PDF documents that were unusually large were potentially undeliverable. This has now been corrected