

Release Notes – Version 5.6.129

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. Bank Reconciliation – Posting to Clearing Accounts

1.1 Overview

This release introduces stricter validation controls in Bank Reconciliation to prevent users from posting directly to tax clearing accounts such as PAYG Withholding, GST Clearing, and PAYG Instalment Clearing. These changes are designed to improve compliance and ensure correct posting to the ATO creditor account.

1.2 Key Enhancements

1.2.1 Posting Restrictions to Tax Clearing Accounts

- **New Validation Rule:** Users will no longer be able to post transactions in Bank Reconciliation directly to:
 - PAYG Withholding Tax
 - GST Clearing
 - PAYG Instalment Clearing
- This applies to the screens noted below, and ensures amounts are correctly directed to the ATO creditor.

1.3 Bank Reconciliation – Main Screen

If any of PAYG Withholding Tax, GST Clearing or PAYG Instalment Clearing are selected or inserted by a legend, the Bank Reconciliation screen will display validation error "Cannot post to tax clearing accounts – post to the ATO creditor instead"

Bank Reconciliation

44787 The Loft at Westwood KEEP 012 CASH AT BANK Testing Departm ☐ Show un

Closing Balance: 0.00 Bank: MBL Bsb: 182-244 Account Number: 45678555

Date	Type	Details	Reference	Amount
> Brought forward				
<div> <div>Type: Other</div> <div>Date: 15/04/2025</div> <div>Details: Testing</div> <div>Amount: 0.00</div> <div>Balance: 0.00</div> <div>Account: 061002 PAYG CLEARING ACCOUNT</div> </div>				

Cannot post to tax clearing accounts - post to the ATO creditor instead

1.4 Bank Reconciliation – Create Allocation

If any of PAYG Withholding Tax, GST Clearing or PAYG Instalment Clearing are selected when creating an allocation, the Bank Reconciliation screen will display validation error "Cannot post to tax clearing accounts – post to the ATO creditor instead"

Allocate Bank Reconciliation -

Date: 28/02/2025

Account	DR	CR	GST	Invoice C
<div> <div>Account: 061002 PAYG CLEARING A/C</div> <div> <div>DR</div> <div>CR</div> </div> <div> <div>Amount:</div> <div>New Account Balance: 660.00</div> </div> <div> <div>Details:</div> <div>Explanation:</div> </div> </div>				

Cannot post to tax clearing accounts - post to the ATO creditor instead

1.5 Bank Reconciliation – Creating a Legend

Selecting PAYG Withholding Tax, GST Clearing or PAYG Instalment Clearing accounts will no longer be possible when creating Local or Global legends in Bank Reconciliation. If existing legends have these codes setup, the Bank Reconciliation screen will display validation error "Cannot post to tax clearing accounts – post to the ATO creditor instead" on processing.

The screenshot shows a 'Bank Reconciliation' form with the following fields and values:

- Type: Deposit
- Date: 08/04/2025
- Details: Cash/Cheques
- Reference: PAYG CLEARING
- Amount: 630.00
- Balance: 2,130.00
- Account: 061002 PAYG CLEARING ACCOUNT
- Reason for not Auto Processing: Cannot post to tax clearing accounts (061002) - post to the ATO creditor instead

At the bottom of the form, there are two buttons: 'Create Receipt' and 'Reverse Payment'. A red error message is displayed at the bottom of the form: 'Cannot post to tax clearing accounts - post to the ATO creditor instead'.

2. StrataMax Add-in for Outlook

2.1 Overview

This release includes an updated version of the StrataMax Outlook Add-in, which will be automatically applied when users update to the latest version of the StrataMax platform. The new add-in introduces changes to login behaviour and enhances functionality related to document queuing with DocMax.

2.2 Key Enhancements and Changes

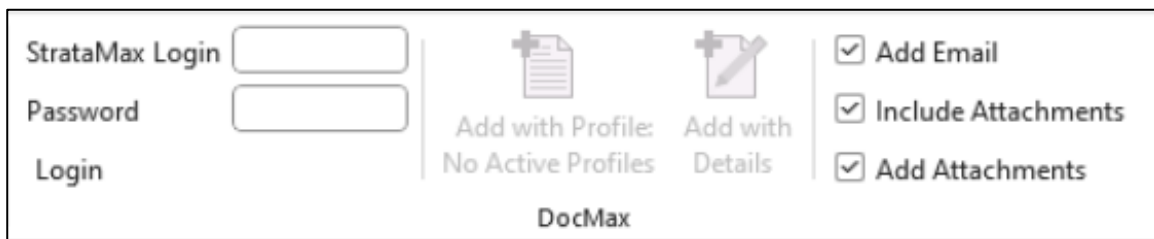
IMPORTANT: Users should continue to use the Classic Outlook. This is just the first set of changes required for the new Outlook.

2.2.1 1. Add-in Auto-Update

- The StrataMax Outlook Add-in will be updated alongside the main platform update.
- Upon launching Outlook post-update, the updated version of the add-in will be applied automatically for users.

2.2.2 New Login Behaviour for Add-in

- **Impacted Users:** After updating to this release, users who do not have 'Remember Me' set on logging in to BCMax will see a new log in option for the StrataMax Outlook Add in in Outlook.
 - These users will now be prompted to log into the StrataMax Outlook Add-in when accessing Outlook.



- Users who have logged in with 'Remember Me' set will not see a change in how the add-in is presented.

2.2.3 DocMax Document Queuing

- Emails sent from Outlook to DocMax no longer require BCMax to be running.
- If BCMax is closed, the email will be added to a Queue in the database and processed the next time the user opens BCMax.
- Behaviour varies based on how the document is added:
 - **Add with Details:** DocMax opens in "Add Document" mode when next BCMax session is started by the user.
 - **Add using Profile:** The email is processed per the profile configuration, with optional property editing.
- If BCMax is open while adding documents, the add-in will continue to function as per current behaviour however the progress bar will no longer be displayed when sending to DocMax.

2.3 Add-in Disabled Recovery

If users find the add-in disabled:

1. Navigate to File > Options in Outlook.
2. Go to Add-ins, then click GO next to Manage COM Add-ins.
3. Enable StrataMax.OutlookAddin by checking the box.
4. Click OK to apply.

What's Better

- Payments – Log entries will be made if a creditor or building is excluded from the Payments screen
- Utility Billing – Retrieve from Finalised will now update YTD Total for Debtor.
- Creditor Invoices – when a Creditor Invoice is created as is On Hold, this will now be logged under Log Viewer.
- Income Tax Report – can now be generated directly from the Tax icon and Report Distribution.
- Report Distribution – File access error when attempting to save the preview to a file already open in another process has been resolved and a new validation message will appear to alert the user to close other application, check permissions and try again.