Release Notes – Version 5.6.130

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 STRATAPAY

What's New

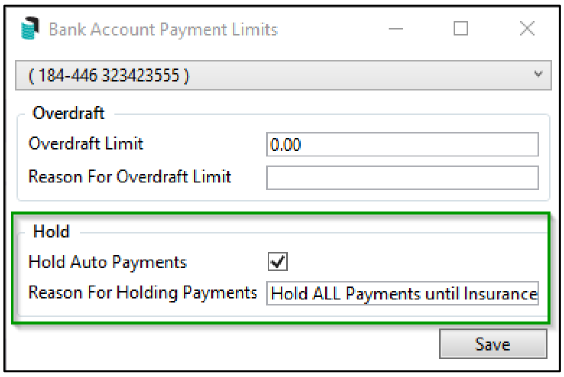
1. Set Overdraft Limit Rename and added Enhancements

The existing 'Set Overdraft Limit' has been renamed to 'Set Bank Account Limits.' While the core functionality remains unchanged, a new feature has been introduced that allows users to hold all Global Payment runs for specific buildings that are set to Hold Auto Payments.

Additionally, the 'Set Bank Account Limits' interface can now be accessed through 'Bank Account Setup', provided the appropriate permissions are assigned.

Summary of Key Changes:

- The menu option 'Set Overdraft Limit' has been renamed to 'Set Bank Account Limits'
- A new 'Hold' section has been added to the user interface
- Set Bank Account Limits is now accessible via Bank Account Setup
- Bank account selection is now available; however, only the Operating Account can be selected at this time.

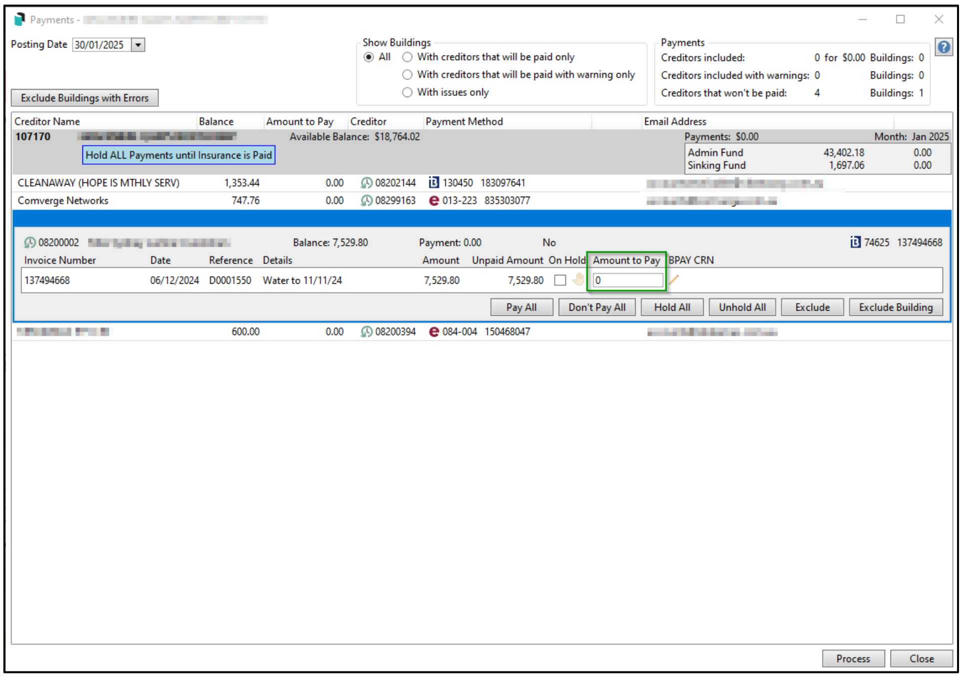


1.1 Hold Auto Payments

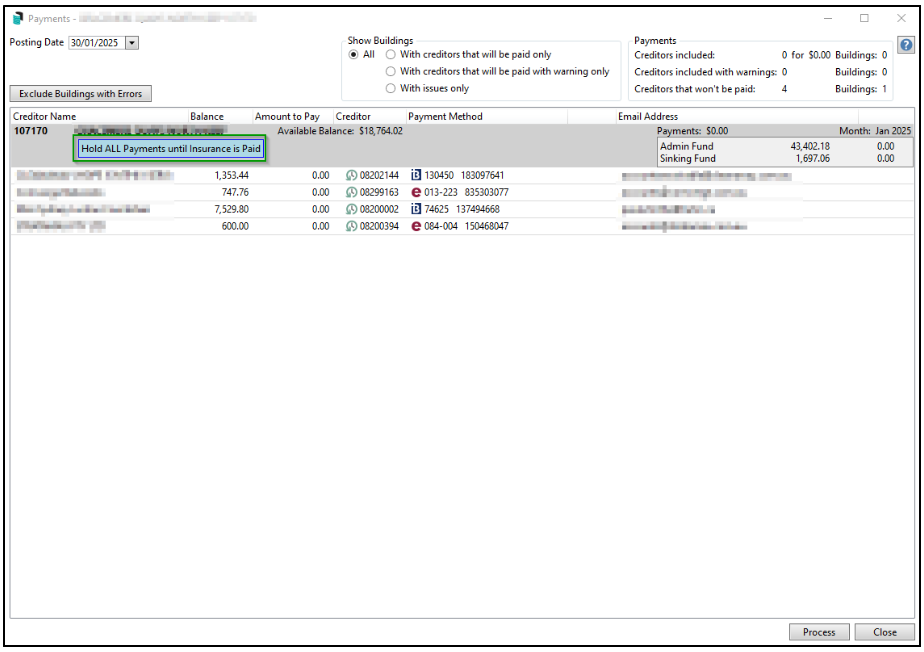
This enhancement has been introduced to provide greater control over payment processing by allowing specific buildings to be excluded from Global or Auto Payment runs. This may be necessary for various operational reasons—for example, if a building is no longer under management (lost), and no further payments should be processed, or if payments need to be temporarily withheld due to a large insurance invoice that must be paid first.

When ‘Hold Auto Payments’ is selected, the following will occur:

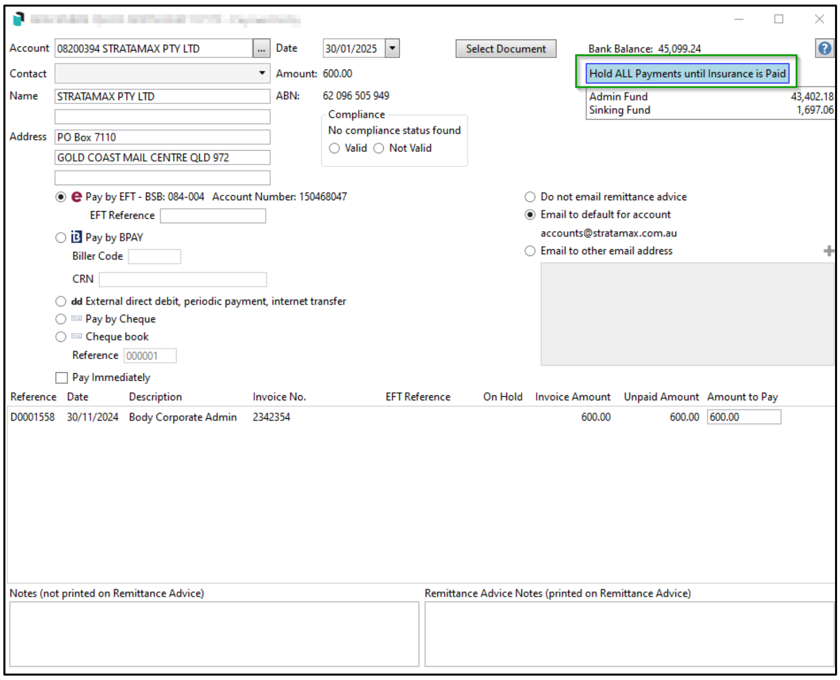
- All payments for the selected building will be excluded from Global and Auto Payment runs.
- In the Payments, all payment amounts will default to 0.00 in the user interface. If a one-off payment is required, users can manually enter an amount in the ‘Amounts to Pay’ field as shown below:



- Payments menu will now display the ‘Hold Reason’ specified in the Set Bank Account Limits screen.



- Payment Entry – Will display the 'Hold Reason' to alert a user that payments should not be made

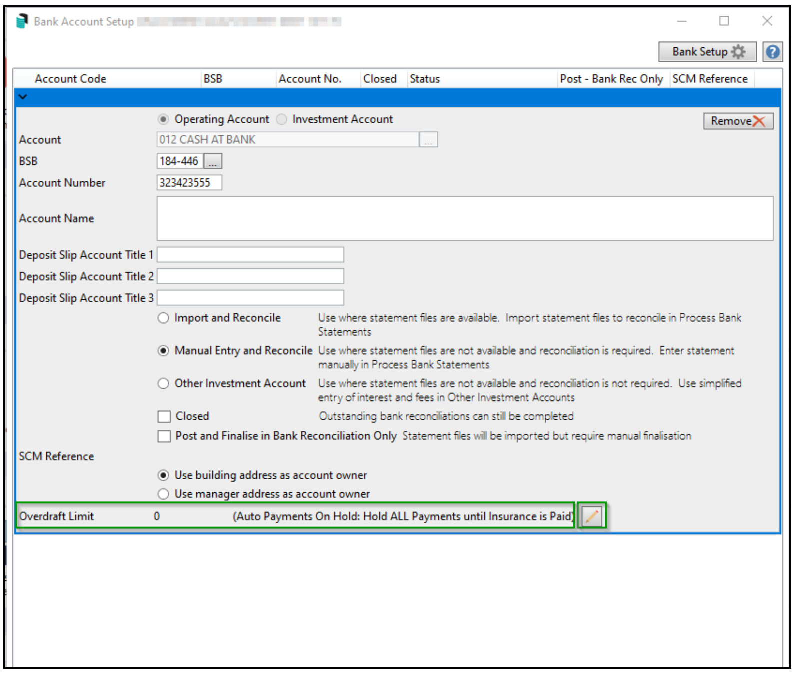


Important Note: Users can still process one off payments. This enhancement will only stop Auto Payment runs from paying invoices. All invoices that are paid manually can still be paid, but the user will be made aware that the Building's Bank Account is on Hold from Auto Payments via the message displaying in the user interface.

1.2 Bank Account Setup – Access to 'Set Bank Account Limits'

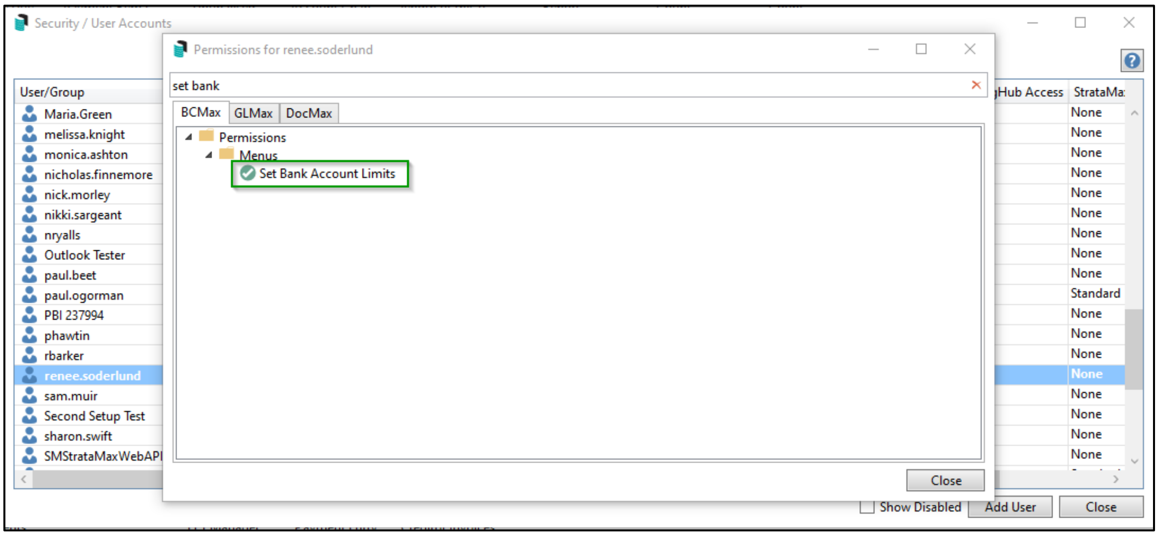
'Bank Account Setup' now provides access to the 'Set Bank Account Limits;' option, allowing users to make changes—provided the necessary permissions have been granted.

The information configured in 'Set Bank Account Limits' will also be displayed within the 'Bank Account Setup' user interface.



1.3 Security Permissions – Set Bank Account Limits

Set Overdraft Limits permissions have been renamed to 'Set Bank Account Limits'

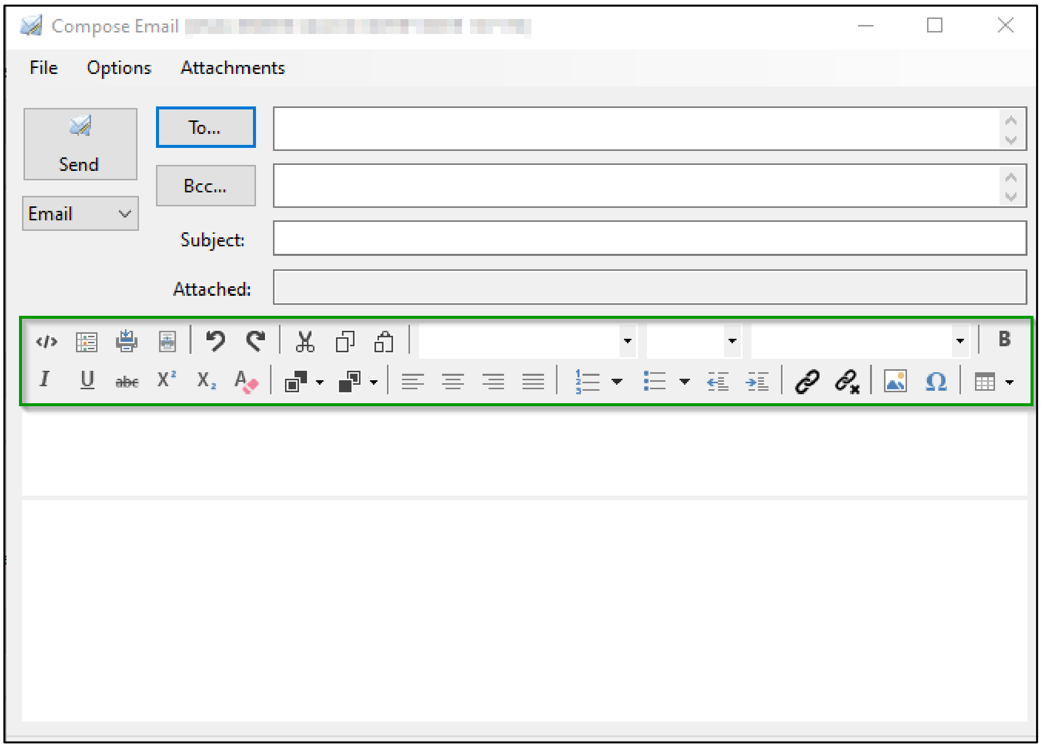


2. Communication Enhancements

Enhancements have been carried out to switch to a newer supported version for .Net8. While the core email functionality remains unchanged and users can expect similar results when sending emails, this upgrade introduces expanded formatting capabilities.

Key Benefits:

- Enhanced compatibility with modern frameworks
- A wider range of font styles now available for email communications and Logs

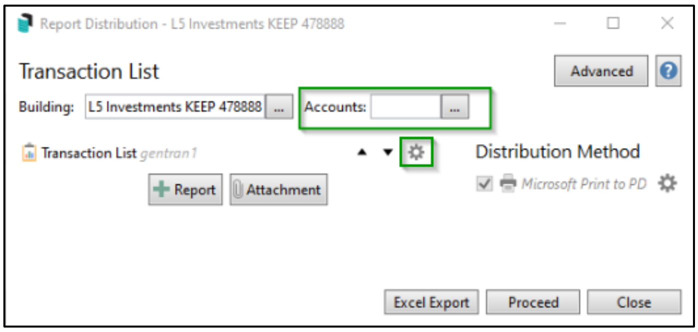


3. Transaction List (old) – removal

As part of the ongoing enhancements, the old Transaction List interface has now been removed. This legacy report relied on outdated functions and reports that are no longer supported.

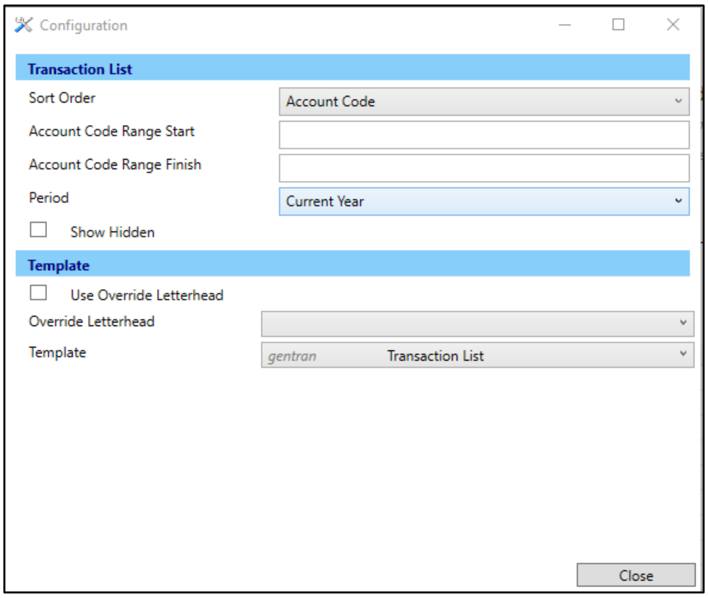
The Transaction List icon will now redirect users to Report Distribution, where Transaction List will be available.

- Users can now select multiple accounts using the 'Accounts' option on the 'Report Distribution ' screen



- Users can manage configurations by using the . Transaction lists can be configured by:

1. Sort Order – Account Code, Entry, Date, Account Code, Account Code Date
2. Account Code Range - Start and Finish can be manually entered
3. Period – Current Year, Current Month, Old Year, Current and Old Year



Local Transactions is the replacement for a complete general ledger which provides the Search functionality to allow the user to setup and save for a more specific view, export to Excel or PDF Report. Local Transactions also has access to the Report for Transaction List as above.

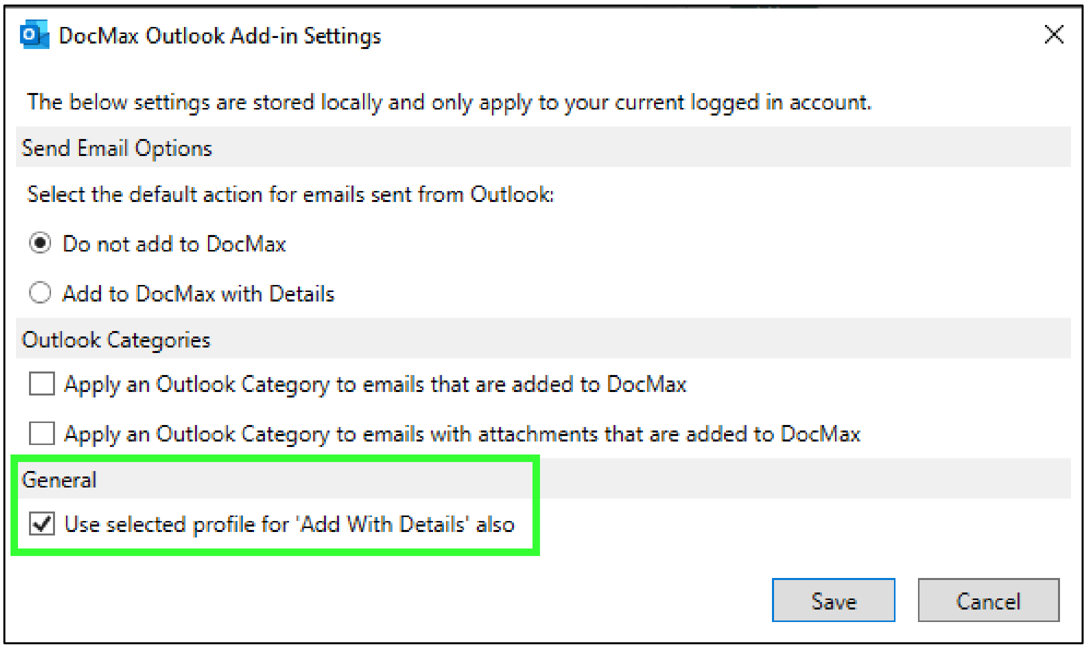
Global Transactions can also be used if transactions are required to be reports across Buildings.

4. Outlook Add-in - 'Use selected profile for Add With Details also'

A new configuration option has been added to the StrataMax Outlook Add-in to allow users to select whether the set profile will be applied when using Add With Details.

To review and set this option navigate to Outlook and click the 'Settings' cog.

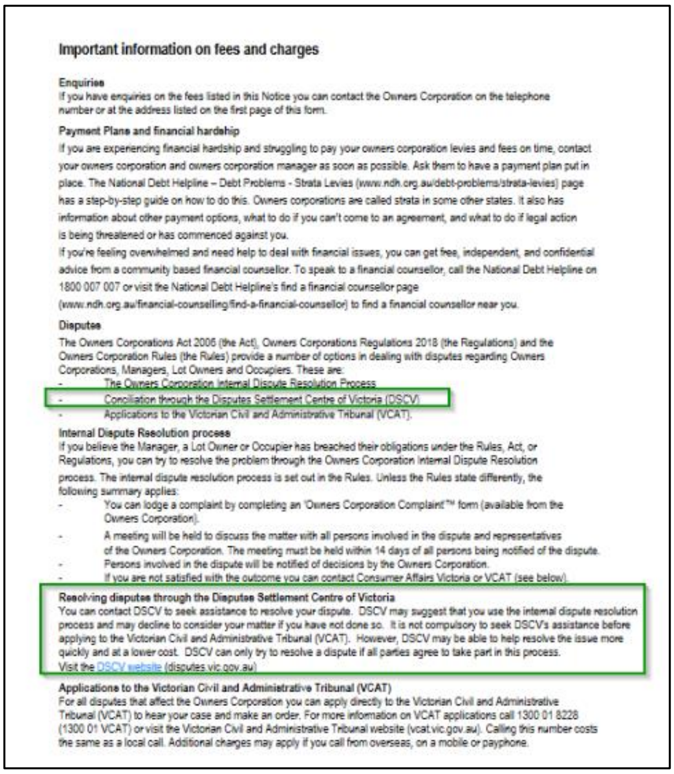
To apply the profile when Add With Details is clicked, check the 'Use selected profile for Add With Details also' option and save. This will apply the profile when opened in the Add Document window.



Uncheck the option if the profile should not be applied when using 'Add With Details'

5. Levy Notice and Arrears Final Fee – VCAT Changes

The following Templates have been updated to reflect the legislative VCAT wording changes



Important information on fees and charges

Enquiries
If you have enquiries on the fees listed in this Notice you can contact the Owners Corporation on the telephone number or at the address listed on the first page of this form.

Payment Plans and financial hardship
If you are experiencing financial hardship and struggling to pay your owners corporation levies and fees on time, contact your owners corporation and owners corporation manager as soon as possible. Ask them to have a payment plan put in place. The National Debt Helpline – Debt Problems - Strata Levies (www.ndh.org.au/debt-problems/strata-levies) page has a step-by-step guide on how to do this. Owners corporations are called strata in some other states. It also has information about other payment options, what to do if you can't come to an agreement, and what to do if legal action is being threatened or has commenced against you.
If you're feeling overwhelmed and need help to deal with financial issues, you can get free, independent, and confidential advice from a community based financial counsellor. To speak to a financial counsellor, call the National Debt Helpline on 1800 007 007 or visit the National Debt Helpline's find a financial counsellor page (www.ndh.org.au/financial-counselling/find-a-financial-counsellor) to find a financial counsellor near you.

Disputes
The Owners Corporations Act 2006 (the Act), Owners Corporations Regulations 2018 (the Regulations) and the Owners Corporation Rules (the Rules) provide a number of options in dealing with disputes regarding Owners Corporations, Managers, Lot Owners and Occupiers. These are:
- The Owners Corporation Internal Dispute Resolution Process
- Conciliation through the Disputes Settlement Centre of Victoria (DSCV)
- Applications to the Victorian Civil and Administrative Tribunal (VCAT).

Internal Dispute Resolution process
If you believe the Manager, a Lot Owner or Occupier has breached their obligations under the Rules, Act, or Regulations, you can try to resolve the problem through the Owners Corporation Internal Dispute Resolution process. The internal dispute resolution process is set out in the Rules. Unless the Rules state differently, the following summary applies:
- You can lodge a complaint by completing an 'Owners Corporation Complaint'™ form (available from the Owners Corporation).
- A meeting will be held to discuss the matter with all persons involved in the dispute and representatives of the Owners Corporation. The meeting must be held within 14 days of all persons being notified of the dispute.
- Persons involved in the dispute will be notified of decisions by the Owners Corporation.
- If you are not satisfied with the outcome you can contact Consumer Affairs Victoria or VCAT (see below).

Resolving disputes through the Disputes Settlement Centre of Victoria
You can contact DSCV to seek assistance to resolve your dispute. DSCV may suggest that you use the internal dispute resolution process and may decline to consider your matter if you have not done so. It is not compulsory to seek DSCV's assistance before applying to the Victorian Civil and Administrative Tribunal (VCAT). However, DSCV may be able to help resolve the issue more quickly and at a lower cost. DSCV can only try to resolve a dispute if all parties agree to take part in this process.
Visit the DSCV website (disputes.vic.gov.au)

Applications to the Victorian Civil and Administrative Tribunal (VCAT)
For all disputes that affect the Owners Corporation you can apply directly to the Victorian Civil and Administrative Tribunal (VCAT) to hear your case and make an order. For more information on VCAT applications call 1300 01 8228 (1300 01 VCAT) or visit the Victorian Civil and Administrative Tribunal website (vcat.vic.gov.au). Calling this number costs the same as a local call. Additional charges may apply if you call from overseas, on a mobile or payphone.

Levy Notice Templates

- note_143
- lnote_156
- lnote_204
- lnote_205
- lnote_208
- lnote_209
- lnote_multioc205
- lnote_multioc208
- lnote_multioc208b
- lnote_multioc208c
- lnote_multioc209

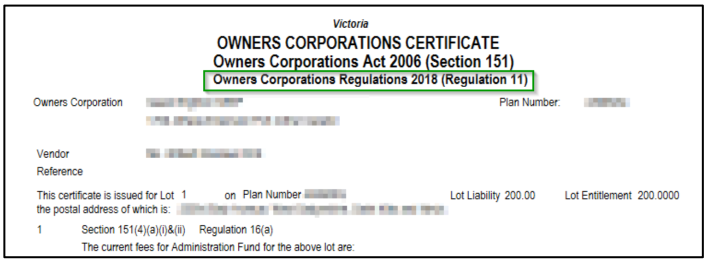
Arrears and Final Fee Notices

- Levyarr_25
- Levyarr_26
- Levyarr_26_ltrhd
- Levyarr_28
- Levyarr_34
- Levyarr_42
- Levyarr_43
- Levyarr_44
- Levyarr_multiOC28
- Levyarr_multiOC43
- Levyarr_multiOC44
- Levyarr_slr_43
- Levyarr_slr_44

Please Note: if there a client specific templates that are being used for levies and Arrears Final Fee these also have been updated.

6. Certificate Changes – Vic Certificate 151

Certificate 151 has been updated as the regulation has been updated for Certificate 151 to reflect 'Owners Corporation Regulations 2018 (Regulation 11)



Victoria

OWNERS CORPORATIONS CERTIFICATE

Owners Corporations Act 2006 (Section 151)

Owners Corporations Regulations 2018 (Regulation 11)

Owners Corporation   Plan Number:

Vendor

Reference

This certificate is issued for Lot 1 on Plan Number   Lot Liability 200.00   Lot Entitlement 200.0000

the postal address of which is:

1   Section 151(4)(a)(i)&(ii)   Regulation 16(a)

The current fees for Administration Fund for the above lot are:

What's Better

- Local Transactions Change Code (creditor invoice) - sets tax code to GST inclusive code if creditor is not registered for GST. This has now been resolved
- Management Fees Invoices Report – Performance increased for large data sets.
- Month End Rollover – Able now to post future dated Journals which include Non Mutual Instalment Tax during the Year End Rollover.
- Certificates - Substitute Account Manager override added and multiple extended answers for CERT151 are now supported (Victoria).
- Bank Transaction Reports for SCM clients now show the Bank logos of the top of the Report.
- Taskmax/Accounts Selection - Compliance Status will now display in the Account Code List grid when Compliance is active.
- Month End Rollover will now check if the user has permissions to complete the process including running the status reports.
- Certificate 205 – Total overdue was including Other Levies Unpaid rather than Other Levies Overdue this has now been resolved. The Asset grid has also been reformatted.