## Release Notes – Version 5.6.132

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 <u>StrataMax Online Help</u>



THE COMPLETE STRATA MANAGEMENT SOLUTION





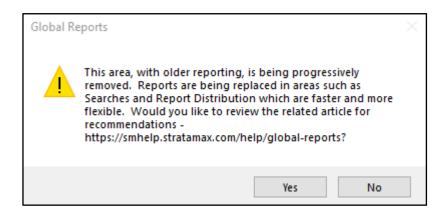


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# What's New

## 1. Reports/Utilities (Global)

A new notification message has been added to the 'Reports/Utilities (Global)' menu item. When users click on this menu, they will now see a message informing the, that this option is being gradually phased put, as most reports have been moved to Report Distribution or Searches. The message also provides a link to a help article for users who wish to learn more about new features.



### 2. Master List legacy reports - Removed

The below 3 legacy reports have been removed from StrataMax, as the varied reporting outputs are now replaced by 'Search Local Accounts'.

- Master List
- Master List A/C Groups
- Master List Tax Code



Please Note – For more information on 'Search Local Accounts' please see <a href="https://smhelp.stratamax.com/help/search-local-and-global-accounts">https://smhelp.stratamax.com/help/search-local-and-global-accounts</a>

### 3. Enhanced Email Communication logging

Additional logging has been added to Email Communication. The system will now capture and log detailed information whenever an email is:

- Edited
- Resumed
- Deleted
- Resent

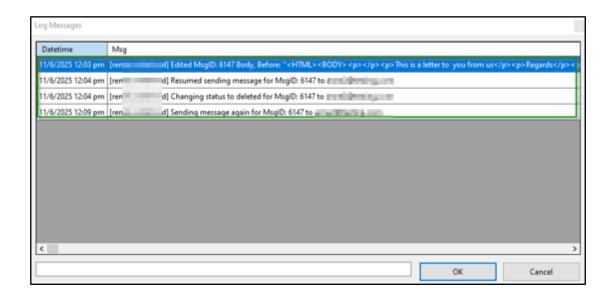
Each Log entry will be included:

- The Type of Action performed
- Specific details of the changes made (where applicable)
- The user who performed the action
- Date and Time of the event

#### 3.1 Viewing Log Messages

To view any events for an email in the View Log, following the below steps:

- 1. Navigate to 'Communications'
- 2. Click on 'File, View Log'
- 3. Right click on the email and select action 'View Log Messages'
- 4. The system will show all events carried out for the original email selected when viewing the log.



### 4. Search Buildings – Enhanced field options

The following fields in 'Search Buildings' have been updated to only 'Yes or No' options, eliminating the previously 'Not Set' choice. The following fields have been updated:

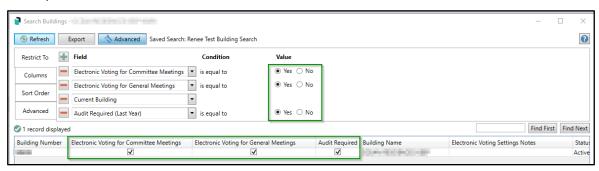
- Electronic Voting for General Meetings
- Electronic Voting for Committee Meetings
- Electronic Voting for Committee Elections
- Audit Required (Last Year)
- Audit Done (Last Year)
- Report to StrataHub Manually
- Strata Renewal Committee Established

**Please Note** – When 'No' option is selected, the system will return information where the settings are explicitly marked as 'No" or was previously 'Not set'

#### Example - Fields set to 'No' or was previously 'Not Set'



#### Example - Fields set to 'Yes'



### 5. Inspections Register Re-write Overview

The Inspections Register has been enhanced with a new User Interface to simplify the creation and management of Inspections.

Inspections Register will replace the existing module whilst still allowing users the same functionality.

Some key aspects of the enhancements are:

- New interface
- Ability to record multiple records for an inspection category
- Attached multiple documents & images to a record
- Ability to record the creditor & additional participants
- Ability to record & track any issues identified during an inspection
- Ability to attach documents & images to a recorded issue
- Account Group (Multi OC) filters
- Auto-calculated Next Due date
- New field titled 'Next Planned' (date) for custom date entry
- Track groups of Inspection Types across multiple buildings through the use of categories.

### 5.1 Inspections - New Interface

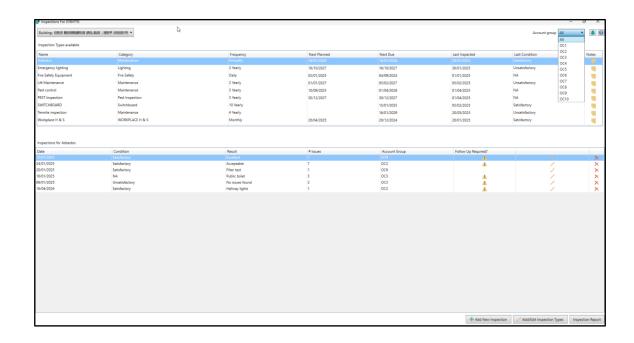


The Inspections screen serves as a central hub offering quick access to all tools necessary for efficient inspection management. From this screen, you can create, manage, and view the following:

- Inspection Types
- All Inspections For any selected Type
- Add New Inspections
- View Inspections Report

#### To access Inspections:

- Navigate to Inspections
- Select the Inspection Type







#### Important Key Information:

- The 'Next Due date' is now calculated by using the 'Last Inspected' date and the 'Frequency.'
- 'Next Planned date' is a new optionally manually entered field, as opposed to the 'Next Due Date' If the two differ.
- Inspections created <u>before</u> the upgrade with no 'Next Due Date' or 'Last Inspected' date, will be created as a Type or Inspection as part of the upgrade,
- Any Inspection entered <u>before</u> the upgrade that had a custom value in the 'Period' field, will default to 'Annual' after the upgrade.

## 6. Inspections Register - Add/Edit Inspection Types

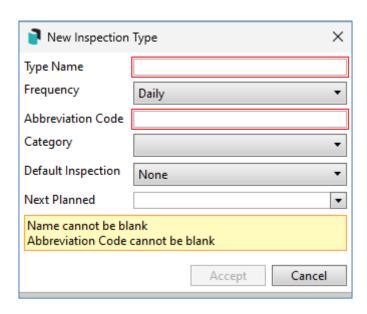
### 6.1 Add/Edit Inspection Types

The Add/Edit Inspection Type function can be selected from the 'Inspection Types Available' screen and will open as a separate pop-up screen. This will allow users to:

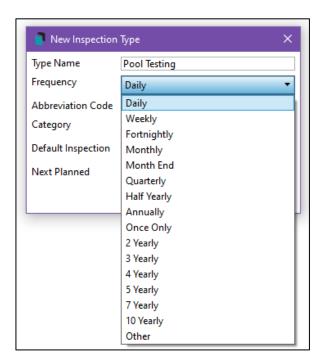
- Add and Edit Inspection Types: Users can create new inspection types based on their needs by specifying the Type Name, frequency, and other relevant details for each type.
- Import Types: If an inspection type already exists on another building, this function allows users to Import Types that are not already present on their building.
- **Delete Inspection Types**: Users have the option to remove unwanted inspection types.
- **Merge Inspection Types**: Users can now merge multiple Inspection Types into one Inspection
- Edit Categories: Categories can be added, edited, and deleted (if the category Is not in use)

#### 6.1.1 Add Inspection Type

Selecting the 'Add Type button' via the Add/Edit Building Inspection Type screen. The 'Add/Edit Building Inspection Type form will open a new window titled 'New Inspection Type.'



As per current functionality the Frequency selection is a drop-down list.



#### Important Information:

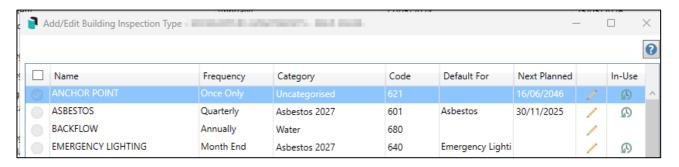
- The 'Type Name, Abbreviation' Code (previously titled code) and 'Category' are mandatory.
- Abbreviation Code must start with 6
- The Accept button will not be enabled until these fields are entered.

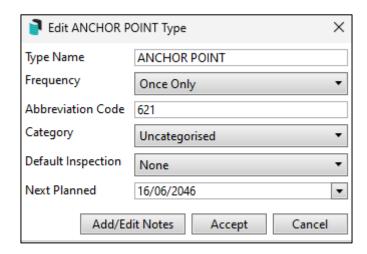
#### 6.1.2 Edit Inspection Type

Edit Type can be done via the Add/Edit Building Inspection Type screen, by selecting the Edit button (pencil).

Edit Type screen has added functionality:

- Next Planned date
- Add/Edit Notes





#### Please Note

- 'Add/Edit Notes' is current functionality, and the notes icon will only appear against an Inspection, IF notes are added
- Notes can also be updated by clicking on the Notes icon on the Inspections screen
- 'Next Planned date' is a new field allowing users to add dates as required

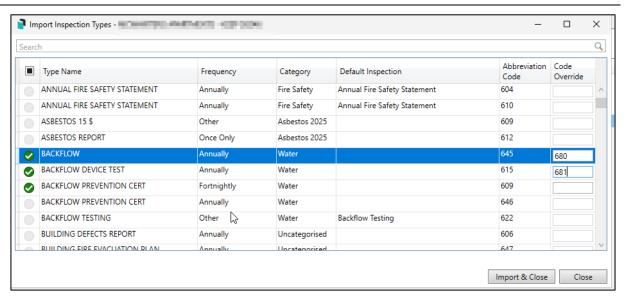
#### 6.1.3 Import Inspection Type

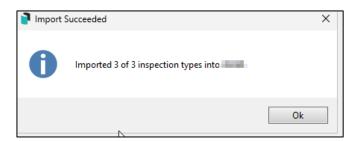
'Import Type' is a new function allowing users to Import Type Names created by other buildings

- Users can select 'all' or select specific ones to Import.
- Code Override field allows users to update the Type Abbreviation code before Importing to avoid clashes with codes on existing Inspection types.
- When Imported Types will appear in the Add/Edit Building Inspection screen and the Inspections screen

From the Add/Edit Building Inspection Type screen

- Select Import Type
- Select All or some Type names
- If required, update Abbreviation Code using the Code Override field
- Select Import & Close
- When the Import is completed a validation message will display



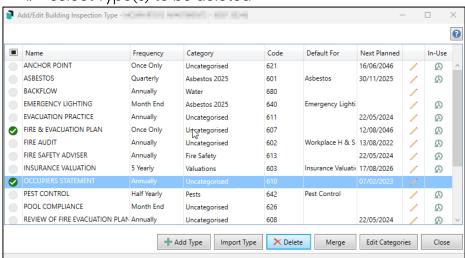


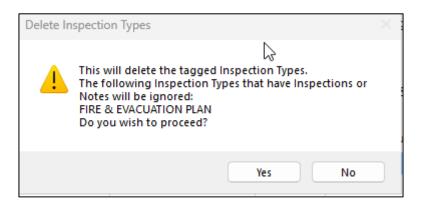
**Important Note** - System will not allow duplicate codes to be imported or entered in the 'Code Override field.'

#### 6.1.4 Delete Inspection Types

The 'Delete' function only allows users to delete Types that do not have an Inspection, or Notes attached. Types with existing Inspections or notes will be flagged as 'In-Use'

1. Select Type(s) to be deleted



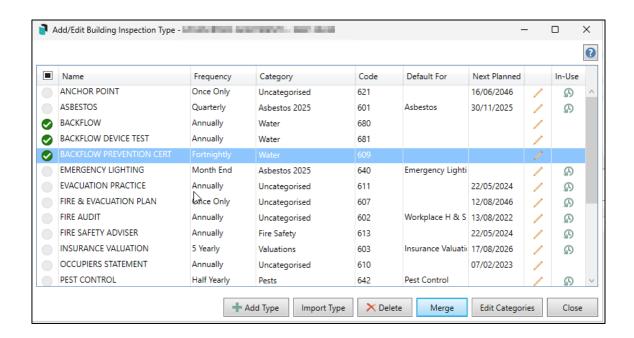


#### 6.1.5 Merge Inspection Types

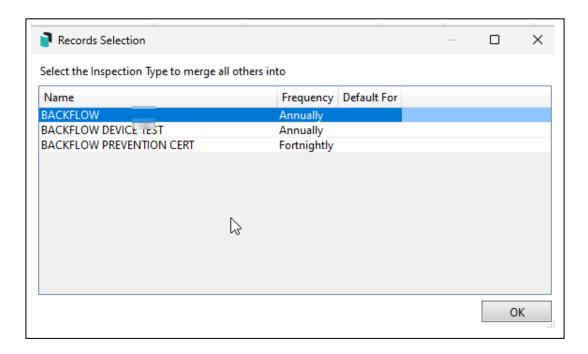
A new "Merge" feature has been added to allow users to combine multiple Types into one. All Inspections attached to the merged Type will be available under the merged 'to' Type.

To merge Types:

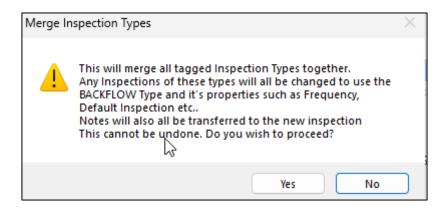
- 1. Select 'Types' to be merged
- 2. Select 'Merge' button



3. Select the Inspection Type to merge all other Types to



4. Users will be prompted with a confirmation message

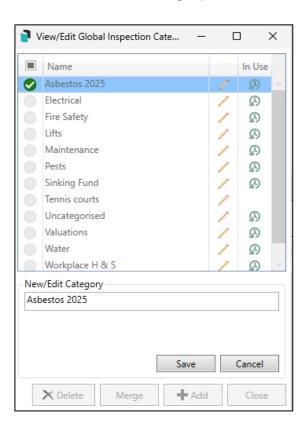


5. When confirmation message is accepted, only the merge 'to' Type will appear in the Add/Edit Building Inspection Type list

#### 6.1.6 Edit Categories

Edit Categories function allows users to manage existing Categories by Adding, Updating, Deleting or Merging Categories.

- From the 'Add/Edit Building Inspection Type' screen:
- 2. Select Edit Category

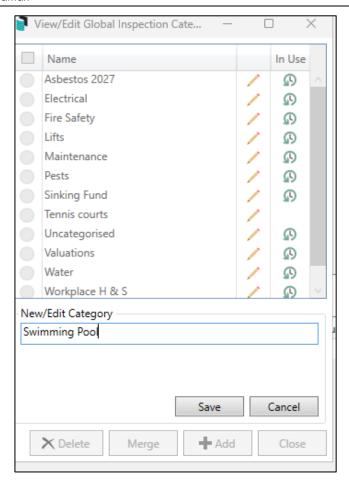


**Important Note** - Editing a Category name will update <u>ALL</u> Inspections for <u>ALL</u> buildings using the Category

#### 6.1.7 Add and Update Categories

Selecting the 'Add button' generates the New/Edit Category field, allowing new Category names to be created.

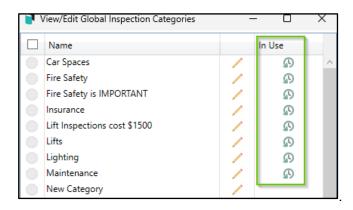
Selecting the 'Edit button' (pencil) also generates the New/Edit Category field, allowing updates to Category names.



Important Note - All buildings can view all Categories

#### 6.1.8 Delete Categories

Categories can only be deleted if the Category is not allocated to an Inspection, Categories are flagged as 'In Use' if Inspections exist.

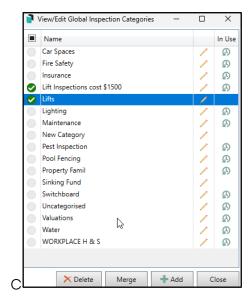


#### 6.1.9 Merge Categories

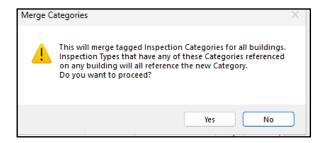
A new "Merge" feature has been added to allow users to combine multiple Categories into one.

To merge Categories

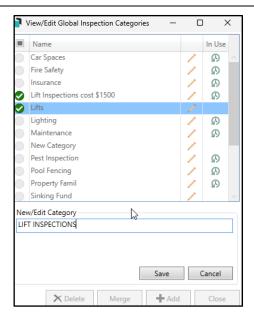
1. Select categories to be merged



2. Select Merge, users will be prompted with a confirmation message



3. When confirmation of message accepted, users will have the option to Edit or accept the Category name



4. Once saved the Update or new Category name will appear in the View/Edit Global Inspection Categories list, merged Categories have been removed.

Important Note - Merged Categories will apply to ALL buildings

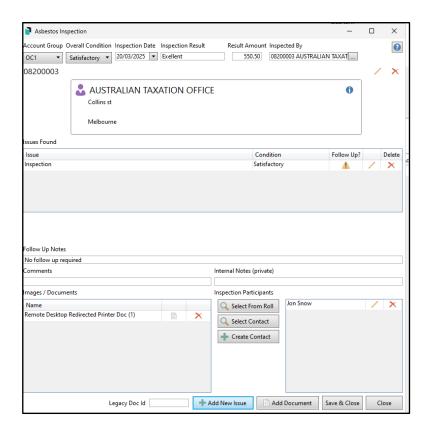
### 7. Inspections Register - Add New Inspection

The 'Add New Inspection' screen has been updated to improve user experience and streamline the process, the enhancements include:

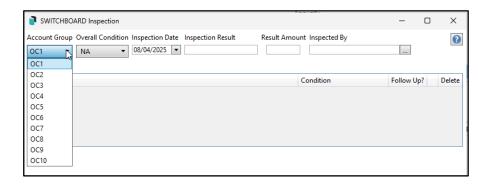
- **Simplified Navigation** The layout and flow have been optimised to make the process quicker and more intuitive.
- Clearer Fields input fields are now better organised.
- Improved Visual Design the screen design has been refreshed for a cleaner and more modern look, making it easier for users to focus on the key information.
- Participants can now be selected from the Roll, Contacts or create a new Contact.
- Documents can easily be added from DocMax.

#### 7.1 Add New Inspection

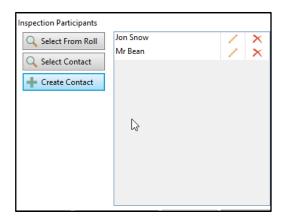
- 1. From the Inspections screen
- 2. Select 'Add New' Inspection



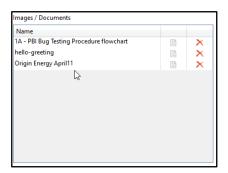
3. Account Group - is a new drop-down list that will only appear for Multiple Owner Corporation buildings.



- 4. **Inspection Participants** new functionality has been added to allow users to add Inspection Participants. This can be done by:
- Selecting From Roll
- Select Contact
- Create Contact



5. Add Document – selecting 'Add document' directs users to DocMax, allowing a user-friendly way to add documents to Inspections.

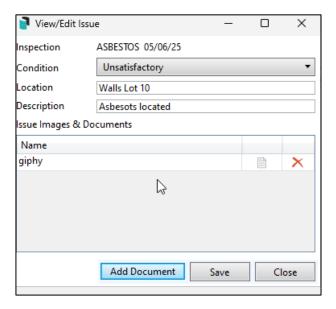


#### Important Information

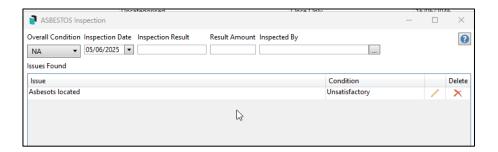
- If an Inspection had Property account and Property details, after UPGRADE these details will appear under Comments.
- If Inspections had Special Instructions, after UPGRADE these will appear under Follow up Comments.
- If an Inspection had a name in the Inspected by field but not a Creditor code, after UPGRADE the name will not appear as Inspections requires a Creditor code.
- Inspections can also be Viewed/Updated by clicking on the Inspection.

#### 7.2 Add New Issue

New functionality has been added to allow Issues to be added to an Inspection by selecting the 'Add New Issue' function.



When an Issue is created the Issue will appear under 'Issues Found' on the Inspection.



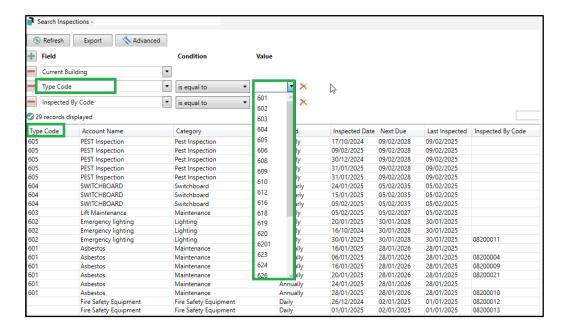
## 8. Search Inspections

Current 'Search Inspections' can be used to search data recorded in the Inspections register across your portfolio, to quickly identify and report items such as upcoming or overdue inspection due dates. Searches can be saved for continuous use, which can then be optionally exported to Excel or produced into a PDF document.

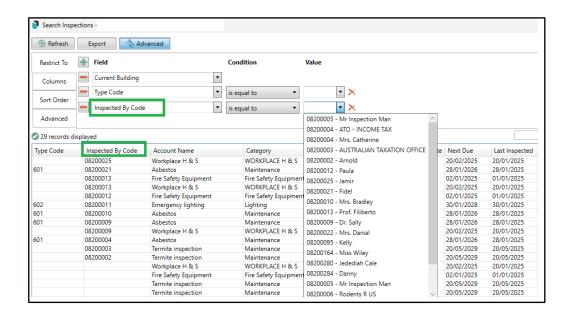
The following changes have been made or added to the Search:

- The 'Account Code' field has been renamed to 'Type Code' and is now a drop-down list.
- 'Inspected by Code' has been updated to a drop-down list.
- Next Planned Date
- Result Test
- Type Name

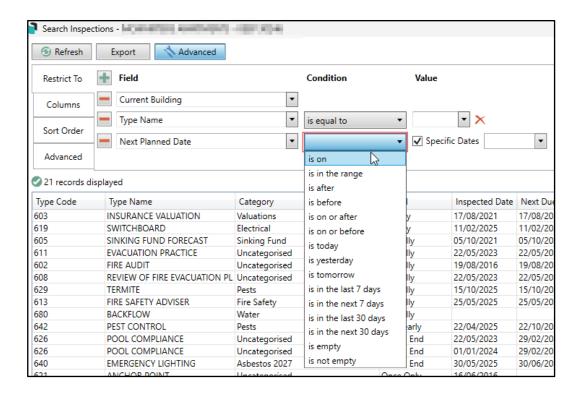
#### Search Inspections Type Code



#### Search Inspections Inspected by Code

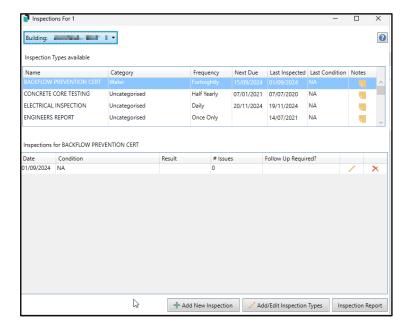


#### Search Inspections Next Planned date

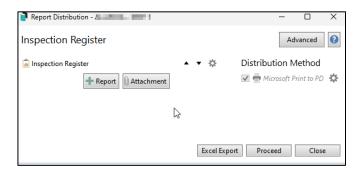


### 9. Inspections - Report

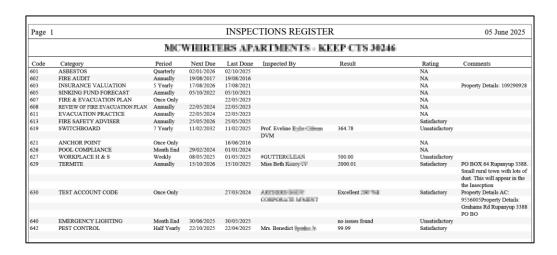
The Inspections Report can be accessed from the Inspections screen.



When selected Report Distribution will open.



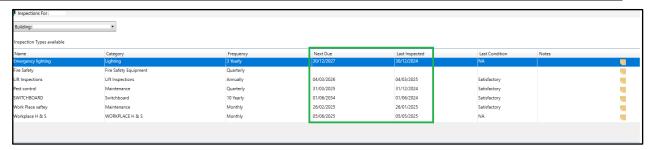
- 6. Select Recipients
- 7. Click Proceed



## 10. Building Information – Report

The current functionality of the Building Information report Inspections section will remain the same. However, the Last 'Inspected by and Next Due date' for each Inspection will populate the Building Information report for inspection types with the correct 'Default For' setting

#### Inspections Summary screen



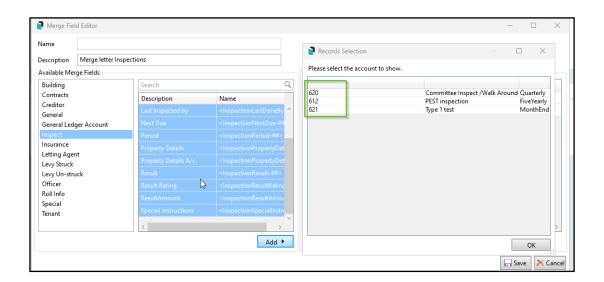
#### Building Report - Inspections

Inspections		
Emergency Lighting Last Inspected	30/12/24	
Emergency Lighting Next Due	30/12/27	
Fire Safety Equipment Last Inspected		
Fire Safety Equipment Next Due		
Workplace H & S Last Inspected	05/05/25	
Workplace H & S Next Due	05/06/25	
Workplace H & S Prepared by	_	
Termite Last Inspected	04/03/25	
Termite Next Due	04/03/26	
Asbestos Inspection Date		
Asbestos Present	N	
Switchboard Inspected	01/06/2024	
Switchboard Inspection Next Due	01/06/2034	
Pest Control Last Inspected	31/12/24	
Pest Control Next Due	31/03/25	

### 11. Merge Letters

Users can now produce a Merge Letter by Inspection

- 1. Navigate to 'Merge Letters'
- 2. View Merge letter list
- 3. Add template
- 4. Available Merge Fields, highlight Inspect, select fields to add to Merge Letter



5. Select the Inspection code the letter is to be created for and save

There is no change to Merge Letter functionality once Merge Letter Template is saved.

### 12. Log Viewer

The 'Log Viewer' in StrataMax has been designed to give users the freedom to apply more refined selections making searches quicker and results easier to review. Users will be able to use the Log Viewer which will display all actions taken within Inspections.

For more detailed information on Inspection changes, please refer to the StrataMax this link - <a href="https://smhelp.stratamax.com/help/inspections">https://smhelp.stratamax.com/help/inspections</a>

# **What's Better**

- Certificates Supported Sealing clause value will be replaced when generating a Certificate
- DocMax View Document History Long usernames will no longer be truncated in the View History log screen.
- Disclosure Statement Info Editor Entered Last Year Sinking Fund Amount will be output if required
- DocMax Documents were not sorted correctly when Sort Order is set to sort by 'Date Added' and then by 'Building Name' in work queues. This has been corrected.
- DocMax View Document History was not being displayed when adding file from drive
- Payments when updating the reference for BPAY or an EFT payment, the correct building name displays on the Payment pop-up
- DocMax Administration Saved Search. Error saving a search where Is Any Of or Is Not Any of is set with a selected building has been corrected.
- SBR Was returning errors when a BAS was being submitted for PAYG Instalments and not registered for GST . This is now resolved
- Arrears Notice Setup- Manage Arrears by Notice Sets activated by the setting under Arrears Notice /File – Enable Arrears management Style has been removed as no longer in use.
- Creditor Invoice index fix and suspected lookup issue has been resolved
- Certificates Marina Subgroups are now able to produce Certificates where required by legislation.
- Arrears Manager Will no longer crash when opening if there are Arrears Notes attached to lots.