

# Release Notes – Task Management

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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



## Contents

<b>1.</b>	<b>Task Management Overview.....</b>	<b>3</b>
<b>2.</b>	<b>Task Details .....</b>	<b>3</b>
2.1	Basic Information.....	3
2.1.1	<i>Adding Task Categories.....</i>	<i>4</i>
2.2	Links .....	5
2.3	Documents .....	6
2.4	Checklist .....	7
2.5	Notes.....	8
<b>3.</b>	<b>Creation of Tasks.....</b>	<b>9</b>
3.1	Manual Creation from the 'Task Management' screen.....	9
3.2	Manual Creation using a 'Quick Task' button .....	9
3.3	Scheduled Tasks.....	10
3.4	Events .....	11
<b>4.</b>	<b>Task Management Board.....</b>	<b>12</b>
4.1	Filters.....	12
4.2	View Types .....	14
4.3	Configuration.....	16
<b>5.</b>	<b>Search Tasks .....</b>	<b>18</b>
<b>6.</b>	<b>Pending Tasks Interactive Dashboard.....</b>	<b>18</b>
<b>7.</b>	<b>Security.....</b>	<b>19</b>

## 1. Task Management Overview

The Task Management module will enable users to create a task for each unit of work they wish to track from initiation to completion. Each task will include a due date, a category, along with the option to assign it to an individual or a group responsible for its execution.

To provide clear visibility and to allow users to manage tasks throughout their lifecycle, tasks can be created and updated on a centralised Task Management board, allowing them to quickly assess the status and progress of each task.

## 2. Task Details

All the particulars of the task can be maintained on the 'Task Details' screen.

The screenshot shows the 'Task Details' window with the following fields and values:

- Due Date:** 1/07/2025
- Title:** New Task
- Description:** (Empty text area)
- Building:** (Dropdown menu)
- State:** Not Started
- Priority:** Medium
- Assigned To:** Iaulene.keet
- Category:** (Dropdown menu)
- Add Link:** URL and Name fields with a '+' icon
- Checklist:** (Empty list with an 'Add' button)
- Notes:** (Empty text area with an 'Add' button)
- Documents (0) / Links (0):** (Empty list)
- Buttons:** Add Document, Save and Close, Close

### 2.1 Basic Information

The following basic information can be specified for each task:

- Due Date – The date at which the task should be completed.
- Title – A title for the task.
- Description – A detailed description for the task.

- **Building** – If the task relates to a specific building, that building can be specified here.
- **State** – The State of the task is used to indicate where the task is in its lifecycle. The task 'State' can be one of the following values:
  - Not Started
  - In Progress
  - Complete
  - Blocked
  - Abandoned
- **Priority** – The priority of the task. The user can select one of the following options:
  - Low
  - Medium
  - High
- **Assigned To** – The person or group of people responsible for the completion of the task. The user can select a single option from a drop-down list of all the users and groups defined in the Security module.
- **Category** – The category for the task. The user can select a single option from a drop-down list of custom defined task categories.

## 2.1.1 Adding Task Categories

To add a new task category:

1. Navigate to 'Task Management'.
2. Click on the 'Categories' button.
3. Click on the 'Add Category' button.

4.

Category Name	In Use	Tasks
Annual General Meeting	7	
Correspondence	10	
Financial	29	
Internal Procedure	8	
Legal Action	0	
Maintenance	12	

Category Name:


+ Add Category   Save Changes   Close

5. Enter a 'Category Name' and click on the 'Save Changes' button.

## 2.2 Links

Multiple hyperlinks can be added to a task.


To add a link to a task:

1. Navigate to 'Task Management'.
2. Select the task you want to add the link to.
3. Enter the 'URL' and the 'Name' for the link and click on the  button.

Add Link



URL

Name




4. The link will be added to the 'Links' tab on the task.


Documents (0)   Links (1)

 The MaxSoft Website 

### Note:

To access the URL specified in the link, click on the  button.

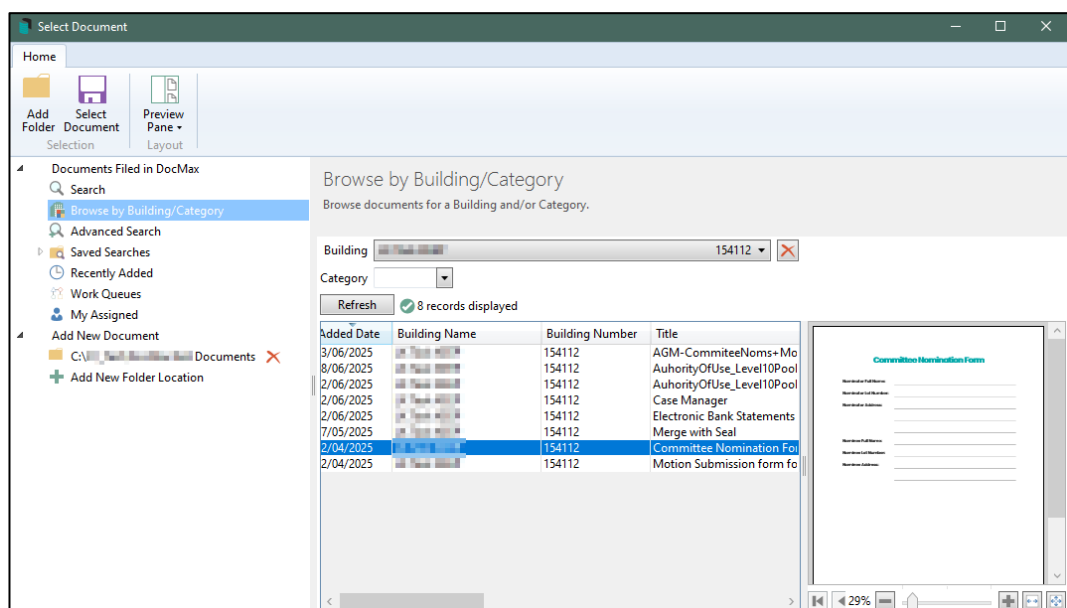
To remove a link from a task:

1. Navigate to 'Task Management'.
2. Select the task from which you want to remove the link.
3. Click on the  button next to the link you want to remove.

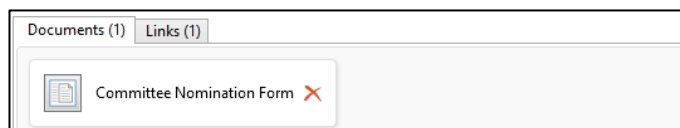
## 2.3 Documents

Multiple documents can be added to a task. To add a document to a task:


1. Navigate to 'Task Management'.
2. Select the task you want to add the document to.
3. Enter the 'Add Document' button.
4. Search for and select the document you want to add to the task.




5. The document will be added to the 'Documents' tab on the task.



### Note:

To access the document added to the task, click on the  button.

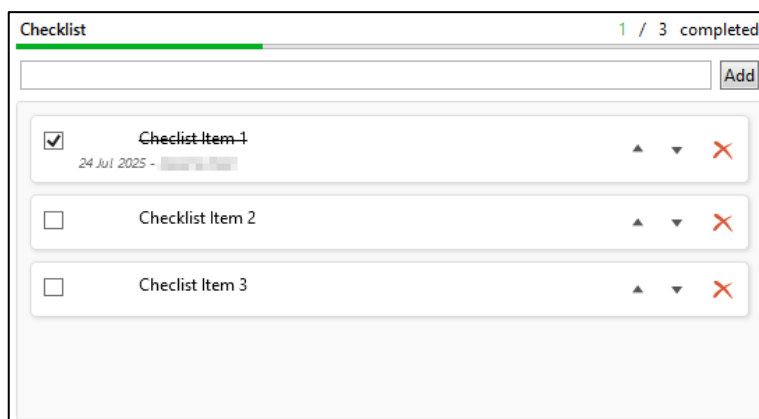
To remove a document from a task:

1. Navigate to 'Task Management'.
2. Select the task from which you want to remove the document.
3. Click on the  button next to the document you want to remove.

## 2.4 Checklist

If a single task consists of multiple steps that need to be completed, a checklist can be added to the task. Each checklist item can be ticked off as it is completed and, if configured this way, the task's 'State' will automatically be set to 'Complete' when the last checklist item is ticked off.

When a checklist item is ticked off, the user that ticked the item as well as the date on which it was ticked will be displayed on the checklist item.



Checklist 1 / 3 completed

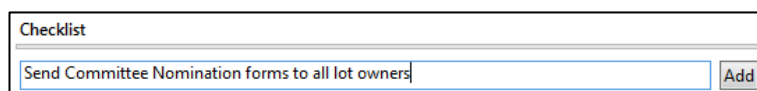
☒ Checklist Item 1  
24 Jul 2025 - John Doe

☐ Checklist Item 2

☐ Checklist Item 3

To add a checklist item to a task:

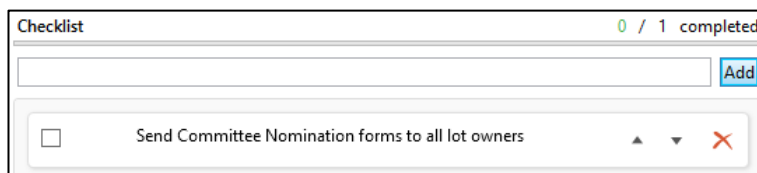
1. Navigate to 'Task Management'.
2. Select the task to which you want to add a checklist item.
3. Enter the description for the checklist item and click on the 'Add' button.



Checklist

Send Committee Nomination forms to all lot owners Add


4. The checklist item will be added to the 'Checklist' section on the task.

**Note:**

To change the order of the items in the checklist, click on either the ▲ or ▼ arrows to move the item up or down in the list.

To mark a checklist item as completed, check the checkbox on the left-hand side of the item.

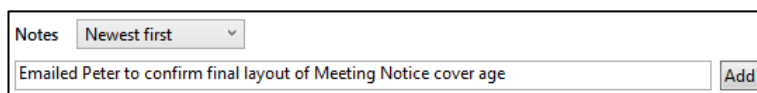
To remove a checklist item from a task:

1. Navigate to 'Task Management'.
2. Select the task you from which you want to remove the checklist item.
3. Click on the  button next to the checklist item you want to remove.

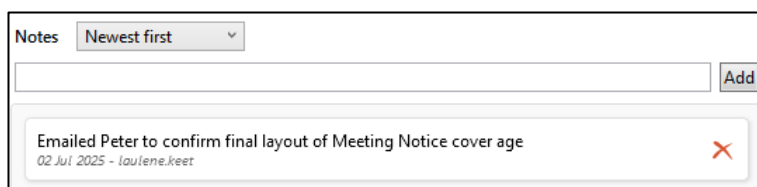
## 2.5 Notes

Multiple notes can be added to the task by different users. To add a note to a task:

1. Navigate to 'Task Management'.
2. Select the task to which you want to add a note.
3. Enter the description for the note and click on the 'Add' button.



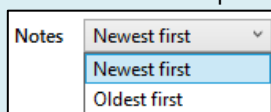
4. The note will be added to the 'Notes' section on the task.






**Note:**

1. To change the display order of the notes, you can toggle between showing the newest notes at the top or the oldest notes at the top.



To remove a note from a task:

1. Navigate to 'Task Management'.
2. Select the task you from which you want to remove the note.
3. Click on the  button next to the note you want to remove.

### 3. Creation of Tasks

Tasks can either be created manually by the user, or they can be automatically created by defining a scheduled task or an event.

#### 3.1 Manual Creation from the 'Task Management' screen

To create a new task manually from the 'Task Management' screen:

1. Navigate to 'Task Management'.
2. Click on the 'Add Task' button.
3. Enter the relevant information for the task.
4. Click on the 'Save and Close' button.

#### 3.2 Manual Creation using a 'Quick Task' button

A  button has been added to multiple screens that will allow the user to add a task from that screen.

A 'Quick Task' button has been added to the following screens:

- Add New Building
- Building Transfers
- DocMax

- Office Bearers
- Inspections
- Invoice Hub > Review Invoices

To create a new task manually:

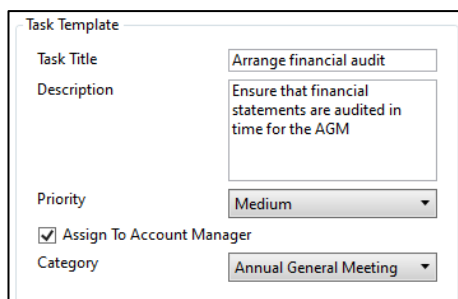
1. Navigate to the relevant screen.
2. Click on the 'Quick Task' button.
3. Enter the relevant information for the task.
4. Click on the 'Save and Close' button.

### 3.3 Scheduled Tasks

Scheduled tasks will automatically create tasks based on a fixed recurring pattern, e.g., levies to be generated every quarter.

To create a scheduled task:

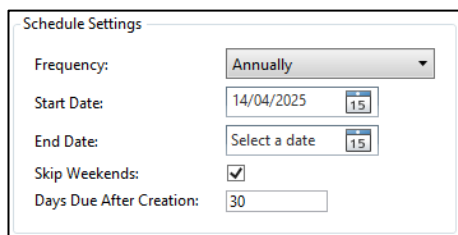
1. Navigate to 'Task Management'.
2. Click on the 'Schedules' button.
3. Click on the 'Add Schedule' button.
4. Enter a 'Name' for the schedule.
5. Enter the information for the task to be created from this schedule in the 'Task Template' section.



The screenshot shows a 'Task Template' form with the following fields and values:

Task Template	
Task Title	Arrange financial audit
Description	Ensure that financial statements are audited in time for the AGM
Priority	Medium
<input checked="" type="checkbox"/> Assign To Account Manager	
Category	Annual General Meeting

6. Specify the details for the fixed recurring pattern that should be used to determine when a task should be created from this schedule.



Schedule Settings

Frequency: Annually

Start Date: 14/04/2025

End Date: Select a date

Skip Weekends: ☒

Days Due After Creation: 30

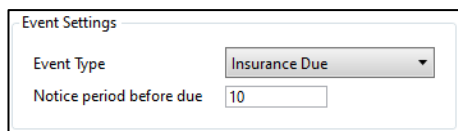
7. Click on the 'Save' button.
8. Click on the 'Close' button.

### 3.4 Events

Events will automatically create tasks when specific events occur. The user will need to click on the 'Generate Auto Tasks' button, on the 'Task Management' screen, to create tasks from the events defined.

To create a scheduled event:

1. Navigate to 'Task Management'.
2. Click on the 'Schedules' button.
3. Click on the 'Add Event' button.
4. Enter a 'Name' for the scheduled event.
5. Enter the information for the task to be created from this event in the 'Task Template' section.
6. Specify 'Event Type' and the number of days before this event the 'Due Date' should be set to on the created task.



Event Settings

Event Type: Insurance Due

Notice period before due: 10

7. Click on the 'Save' button.
8. Click on the 'Close' button.

**Note:**

Tasks will be created if the specified event will occur within the number of months specified on the 'Configuration' screen – see section [4.3 below](#)

## 4. Task Management Board

The 'Task Management' board is the central point from which users can search for and manage tasks as well as maintain task categories and schedules.

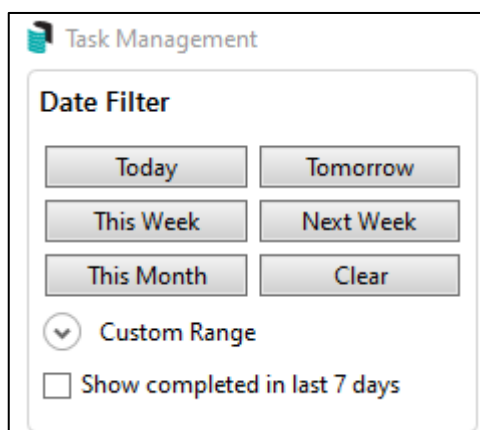
Tasks will display in different colours depending on the 'Priority' specified on the task. If the task's 'Priority' is set to:

- Low – The task will be displayed in green.
- Medium – The task will be displayed in yellow.
- High – The task will be displayed in red.

### 4.1 Filters

The tasks on the board can be filtered by specifying criteria for one or more of the filters on the right-hand side of the screen.

#### Date Filter Section



The screenshot shows a 'Task Management' window with a 'Date Filter' section. It contains several buttons for quick selection: 'Today', 'Tomorrow', 'This Week', 'Next Week', 'This Month', and 'Clear'. Below these is a 'Custom Range' option with a dropdown arrow. At the bottom, there is a checkbox labeled 'Show completed in last 7 days'.

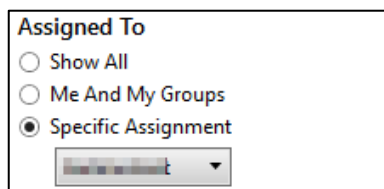
Tasks can be filtered based on the 'Due Date' by either selecting one of the quick filters or by selecting a custom date range.

The user can choose to view:

- Only the cases that were completed within the last day by not checking the 'Show completed in the last 7 days' checkbox.
- All the cases that were completed within the last 7 days by checking the 'Show completed in the last 7 days' checkbox.

**Note:**

The user can set the number of days of completed cases to display, when the 'Show completed in the last...' checkbox is checked, on the screen's configuration – see section [4.3 below](#).

**Assigned To**A screenshot of the 'Assigned To' filter control. It features a title 'Assigned To' followed by three radio button options: 'Show All', 'Me And My Groups', and 'Specific Assignment'. The 'Specific Assignment' option is selected. Below the radio buttons is a dropdown menu showing a list of users or groups, with a small downward arrow on the right side.

Tasks can be filtered based on the user or group they are assigned to by selecting:

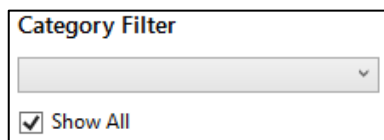
- Show All – To display all tasks irrespective of the 'Assigned To' value.
- Me and My Groups – To display all tasks assigned to the current user and any security groups they are a member of.
- Specific Assignment – To display all the tasks assigned to the user or group specified in the filter.

**Building / Company Filter**A screenshot of the 'Building / Company Filter' control. It features a title 'Building / Company Filter' followed by four radio button options: 'All Buildings', 'Current Building', 'My Buildings (Account Manager)', and 'Office Tasks'. The 'All Buildings' option is selected.

Tasks can be filtered based on the 'Building' specified on the task by selecting:

- All Buildings – To display all tasks irrespective of the building specified on the task.
- Current Building – To display the tasks linked to the current building.
- My Buildings (Account Manager) – To display the tasks linked to the buildings where the current user is specified as the 'Account Manager'.
- Office Tasks – To display all the tasks that are not linked to a building.

## Category Filter

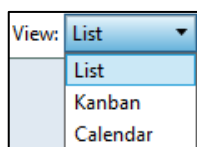
A UI element titled 'Category Filter' containing a dropdown menu and a checkbox labeled 'Show All'.

Tasks can be filtered based on the 'Category' specified on the task by:

- Checking the 'Show All' checkbox – To display all tasks irrespective of the 'Category' specified on the task.
- Unchecking the 'Show All' checkbox and selecting the relevant category in the filter – To display only the tasks for the selected category.

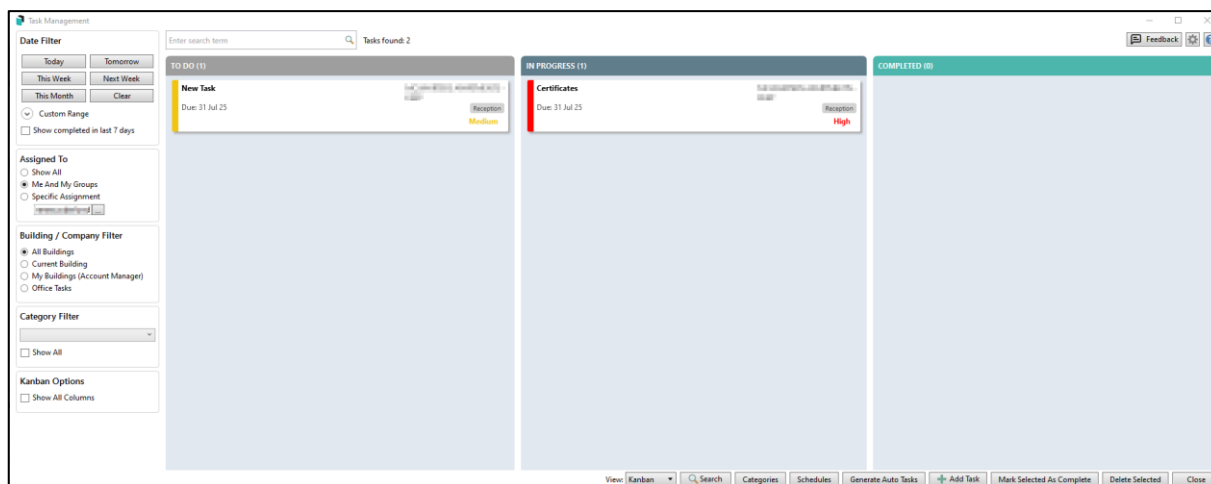
## 4.2 View Types

The Task board can be accessed by navigating to 'Task Management' and can be displayed in different ways by selecting the required view in the 'View' field,

A dropdown menu labeled 'View:' with options: List, List, Kanban, and Calendar.

### The 'Kanban' view

The 'Kanban' view will display tasks in different columns based on the current 'State' of the task. The tasks in each column will be ordered by 'Due Date', with the oldest dates at the top.

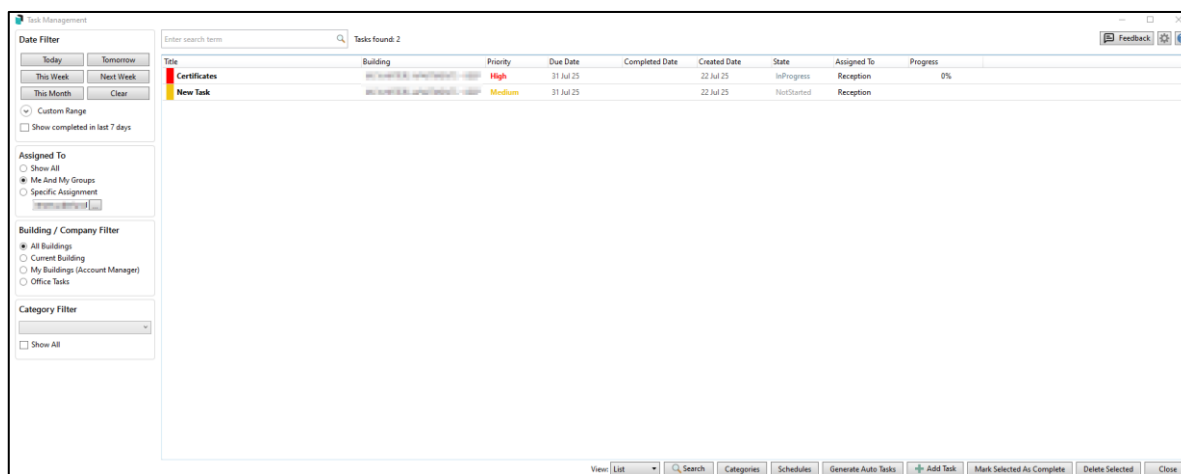


The user can choose to view some or all columns on the board. If the 'Show All Columns' field in the 'Kanban Options' section is:

- Checked – The following columns will be displayed:
  - TO DO
  - IN PROGRESS
  - COMPLETED
- Unchecked – The following columns will be displayed:
  - TO DO
  - IN PROGRESS
  - COMPLETED
  - BLOCKED
  - ABANDONED

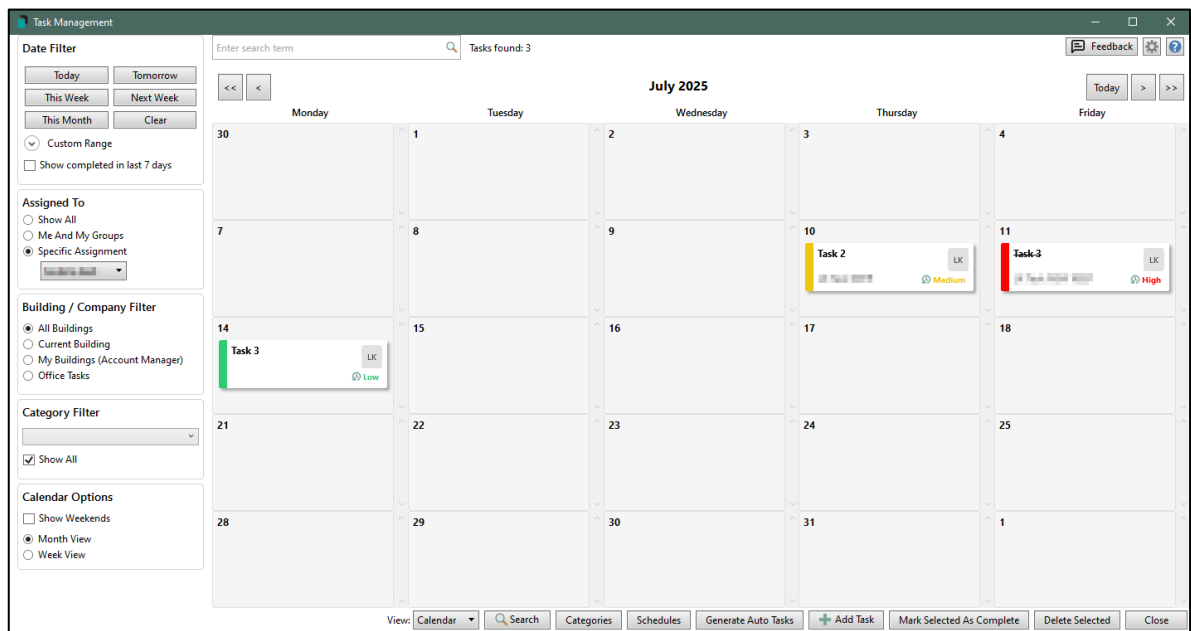
## The 'List' view

The 'List' view will display all tasks in a list.



## The 'Calendar' view

The 'Calendar' view will display tasks in a calendar based on the 'Due Date' specified on the task. Tasks that have been completed will be struck through.



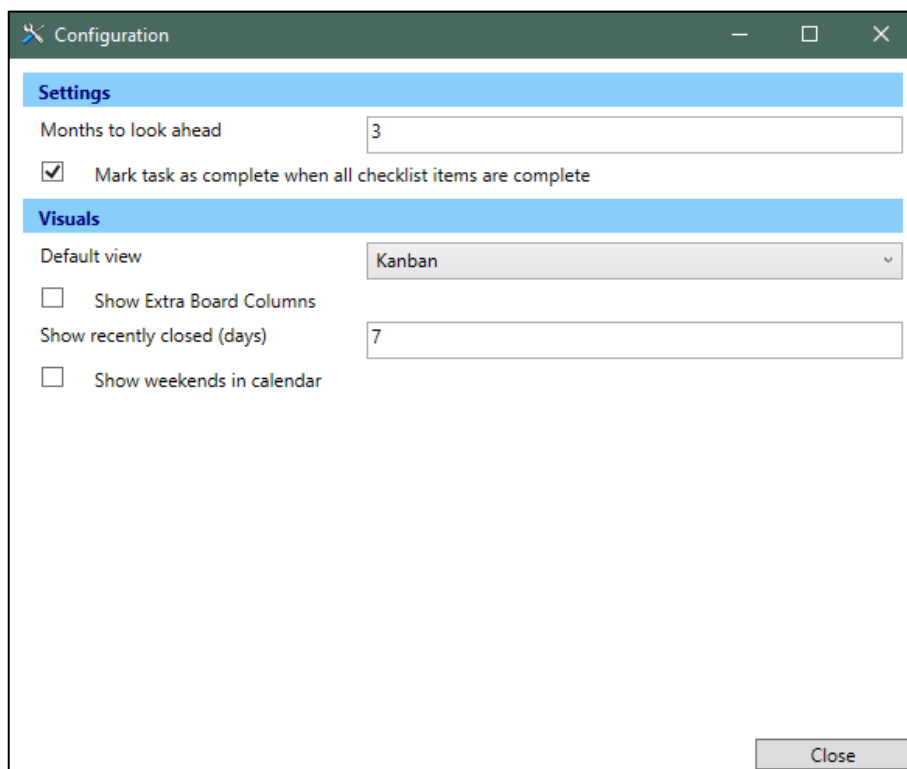
The user can choose to view:

- Weekends on the board. If the 'Show Weekends' field in the 'Calendar Options' section is:
  - Checked – The calendar will display weekdays and weekend days.
  - Unchecked – The calendar will display weekdays only.
- The calendar in 'Month View' or 'Week View' by selecting the radio button.

### 4.3 Configuration

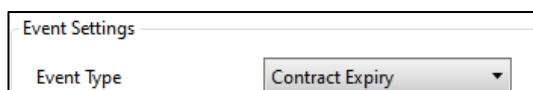
The following configuration settings can be defined for the 'Task Management' screen.





The screenshot shows a 'Configuration' window with two sections: 'Settings' and 'Visuals'. In the 'Settings' section, 'Months to look ahead' is set to 3, and the checkbox 'Mark task as complete when all checklist items are complete' is checked. In the 'Visuals' section, 'Default view' is set to 'Kanban', 'Show Extra Board Columns' is unchecked, 'Show recently closed (days)' is set to 7, and 'Show weekends in calendar' is unchecked. A 'Close' button is at the bottom right.

- Months to look ahead – This setting will impact which tasks are created when the 'Generate Auto Tasks' button is clicked on the 'Task Management' screen. Tasks will be created for the events, defined on *Task Management > Schedules* screen, with an 'Event Type' that will occur within the specified period in this configuration setting.



The screenshot shows a dropdown menu titled 'Event Settings'. The 'Event Type' is currently set to 'Contract Expiry'.

- Default View – The default view that should be displayed when the 'Task Management' screen is opened.
- Show Extra Board Columns – This setting relates to the 'Kanban' view only. If this checkbox is checked, the 'Blocked' and 'Abandoned' columns will be displayed by default when the 'Task Management' screen is opened.
- Show recently closed (days) – The number of days specified in this configuration setting will determine the number of days displayed in the 'Show completed in last...' checkbox on the 'Task Management' screen.

Date Filter

Today

Tomorrow

This Week

Next Week

This Month

Clear

Custom Range

Show completed in last 7 days

- Show weekends in calendar – This setting relates to the ‘Calendar’ view only. If this checkbox is checked, weekend days will be displayed in the calendar by default when the ‘Task Management’ screen is opened.

5. Search Tasks

A new Search has been added that will allow users to search for tasks based on specified filter criteria. The user can also define saved searches and opt to add these saved searches to the Dashboard.

Search Tasks

Refresh

Export

Advanced

Field

Condition

Value

My Tasks

Task State

is not equal to

Complete

2 records displayed

Find First

Find Next

Building Number	Building Name	Assigned To	Due	Title	Priority	Task State
154112	LK Task KEEP		14/07/2025	Task 3	Low	Not Started
			10/07/2025	Task 2	Medium	In Progress

Edit Task

Print

Load/Edit/Delete Search

Save Search

Save Search As

Close

6. Pending Tasks Interactive Dashboard

A new Interactive Dashboard has been added for Pending Tasks, i.e., all active tasks assigned to the current user.


When the user clicks on any of the tasks in the list, the ‘Task Details’ screen will be opened where the user can edit the task.

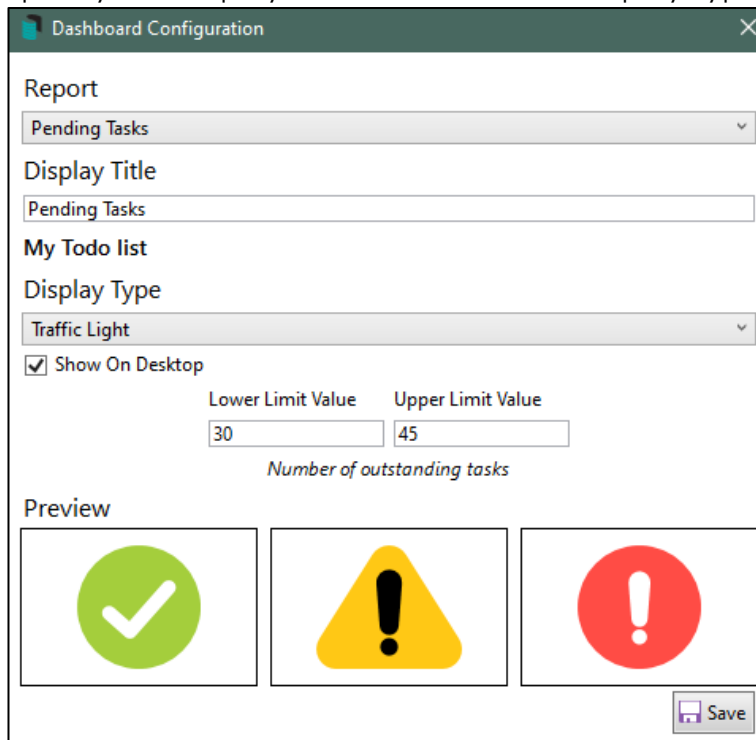
Dashboard

My Pending Tasks

Title	Building	Priority	Due Date	Completed Date	Created Da
Task 1		High	30 Jul 25		23 Jul 25
Task 2		Medium	31 Jul 25		23 Jul 25
Task 3		Low	06 Aug 25		24 Jul 25

To create a Pending Tasks Interactive Dashboard:

1. Click on the  button of the dashboard where you want to add Pending Tasks.
2. Click on the 'Add Dashboard Item' button.
3. Select 'Pending Tasks' in the 'Report' field.
4. Specify the 'Display Title' and select the 'Display Type' for the Dashboard tile.

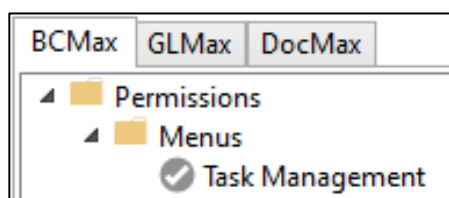


5. Click on the 'Save' button

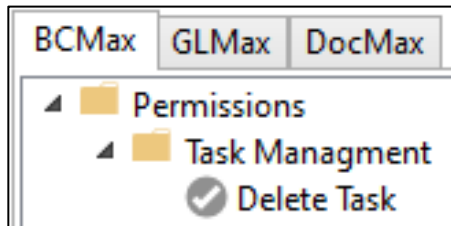
## 7. Security

The following security permissions can be defined for Task Management:

- Task Management – This permission will grant or deny the user the right to access the 'Task Management' screen.



- Delete Task – This permission will grant or deny the user the right to delete tasks created by other users, i.e., a user will always be able to delete tasks they created.



- Manage Schedule and Events – This permission will grant or deny the user the right to add, edit, remove scheduled tasks and/or events.

