Release Notes – Version 5.6.136

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

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What's New

1.   Certificates Preview – Integration with Report Distribution

This release introduces a new preview feature for Certificates, utilising Report Distribution. Users will have the ability to switch between the two interfaces Legacy Certificates and Certificate Preview as needed if permissions are granted to do so.

Administrators can grant access to the 'Change Preview Feature,' allowing users to choose between the existing legacy certificate view or the new preview mode integrated with Report Distribution.

Benefits using the Certificates Preview are:

- Reliability in emailing certificates that have large CMS documents and other Document Inclusions
- Reduce risk of delivery failures due to the file size
- Enhanced user flexibility with interface selection
- Users can continue to work as usual, with the legacy certificate process if they wish

Please Note – This feature will be available across all states. For certificates produce for VIC or NT, existing settings from the Special Menu will be automatically carried over if previously configured.

If any updates are required for Requisitions, changes will need to be made in the Legacy Certificates interface before generating the certificate in Certificate Preview.

1.1   Security Settings to grant access

A new security permission 'Change Preview Features' has been introduced to control user access to switch between Legacy Certificate view and the Certificate Preview. When this permission is enabled, users will be able to toggle between the two interfaces as needed.

1.1.1   Security

Under the User/Group in security there is a new option 'Preview Features' this will appear when the 'Change Preview Features' permission is enabled.
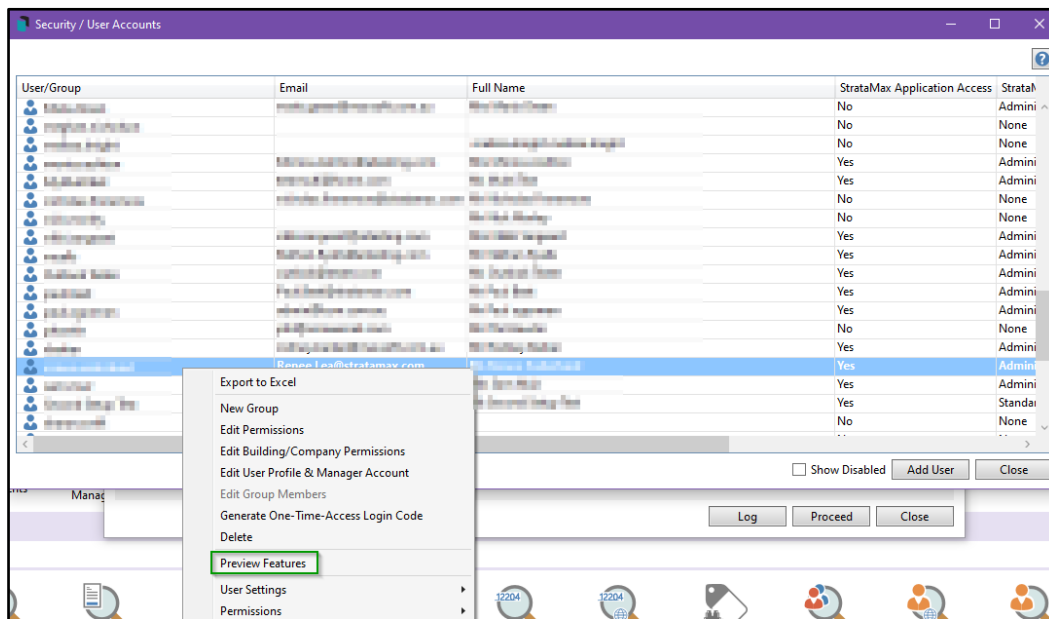
This will open a configuration window as per below where the setting can be turned on of off at the user level.
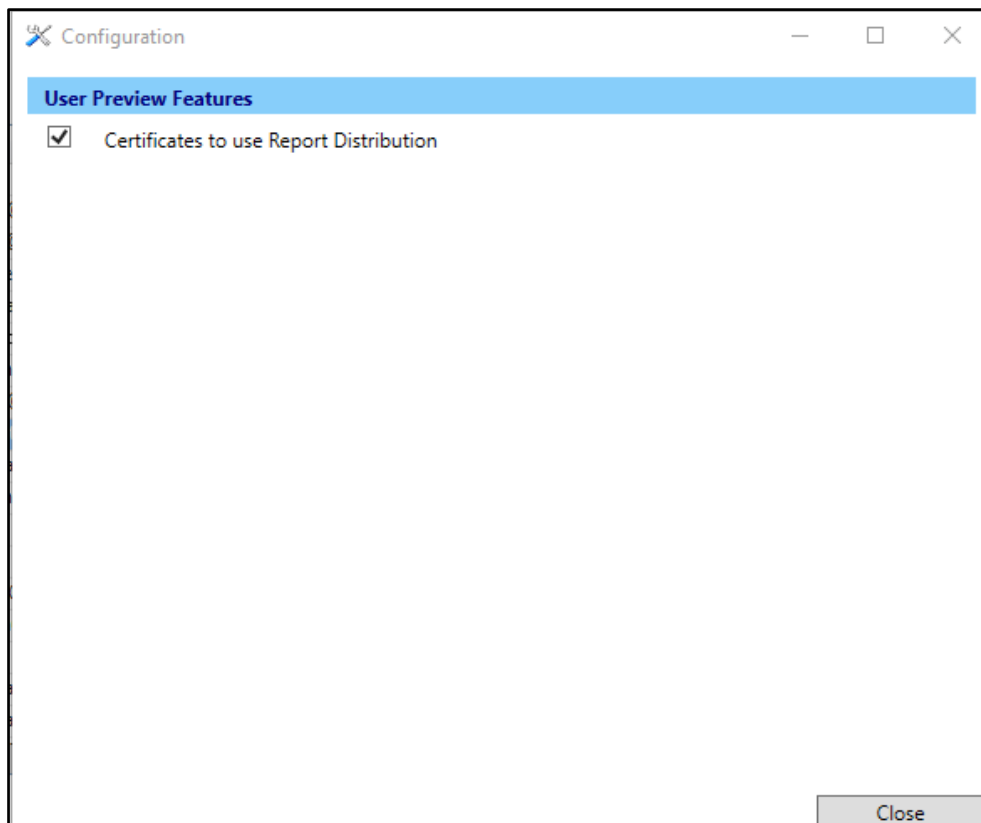
1.1.2   Accessing Configuration using - User name

If access has been granted, users can also access the configuration directly from the StrataMax Desktop by clicking on their username located at the bottom right hand corner of the screen and selecting 'Preview Features'

This allows users to also switch between Legacy Certificates and Certificate Preview modes without need to go through the security settings.
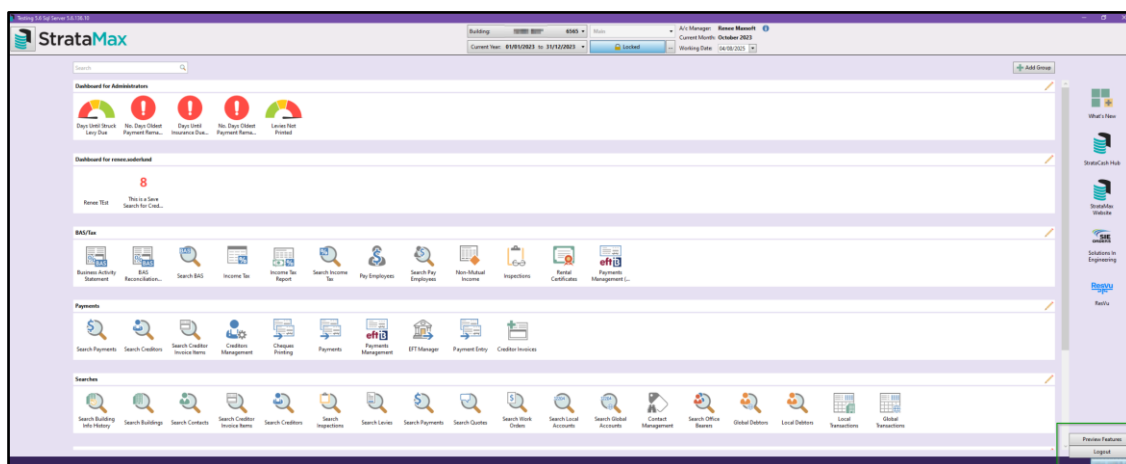
Please Note – By default, users are granted access to switch between Legacy Certificate and Certificate Preview modes.

1.2   Certificate Preview

1.2.1   Configuration

When a user has Certificate Preview enabled and selects the Certificates module, the Report Distribution window will automatically open.

If a CMS is attached to the Building Information, it will appear by default along with the Certificate, Cover Letter and additional documents previously added via Document Inclusions.

To modify any settings, click the configuration cog next to Certificate. The following configurations can be managed from this window:

- **Applicant** – If left blank, this will default to the selected Owner. Alternatively, an applicant can be selected from the dropdown list of available applicants marked with the 'Certificate' business type via 'Applicant Maintenance.'
- **Certificate Settings** – options include Seals, Attache CMS, Calculate Interest , Current Levies Only, Assets Value, Document Inclusion, and Info Editor.

- **Cover Letter** – Manage and customise the cover letter included with the certificate
- **Custom Text** – Add or Edit custom text as needed

1.2.2   Attach CMS Document setting

When enabled, this setting will automatically include the CMS from the Building Information, if available.

We recommend users to save the CMS to the Building Information and ensure the 'Attach CMS Document' options are selected. This allows the CMS to be added to the certificate automatically, without needing to use Document Inclusion, which can also help reduce the overall size of the emailed document.

Building Information – CMS setup
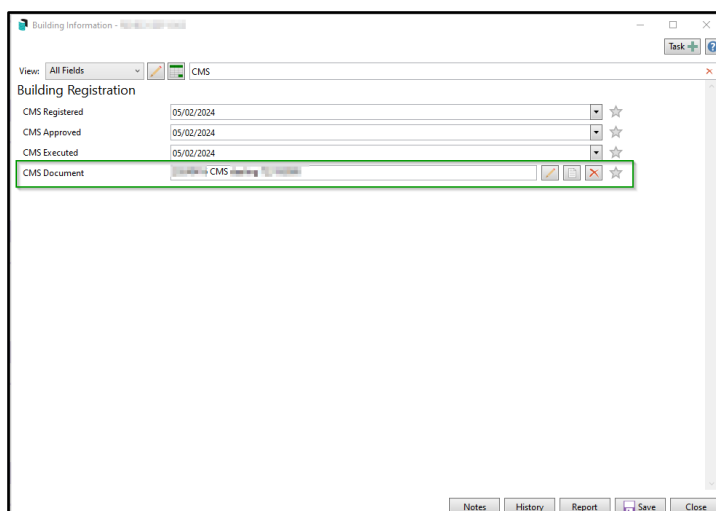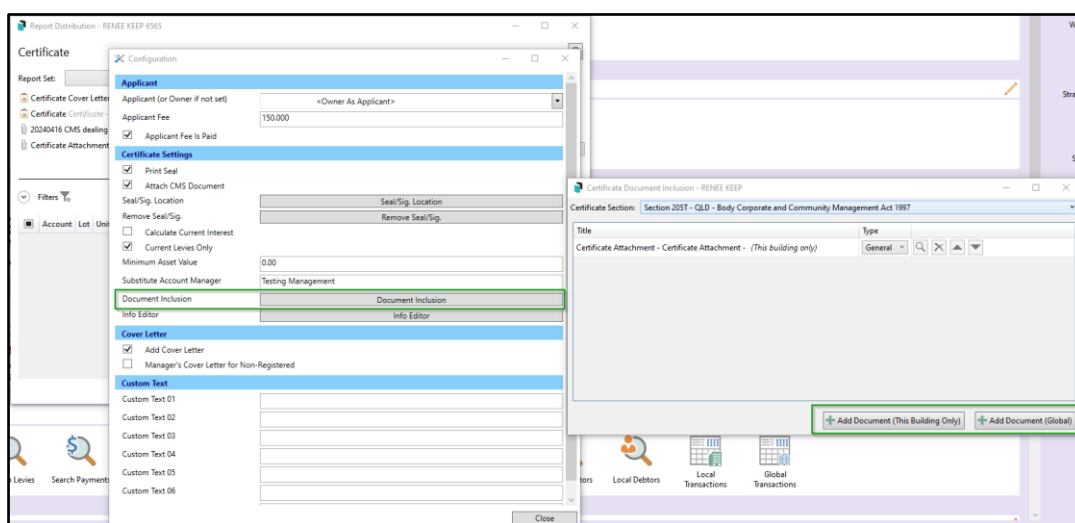

CMS Setting - Certificate Preview
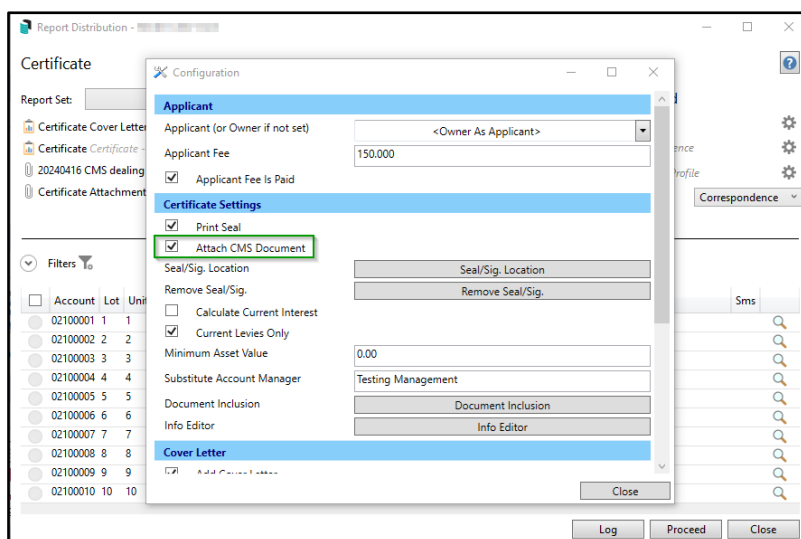
1.2.3   Document Inclusion

Document Inclusion will automatically display any documents configured in the Legacy Certificates for both building specific and global attachments.

Users can also add/delete new documents directly within Certificate Preview by following these steps:

1. Navigate to 'Certificate Preview'
2. Click on the Certificate Settings Cog
3. Click on 'Document Inclusion'
4. Click Add Document, choose either Building Only or Global
5. Save documents from either a file or DocMax


1.2.4   Info Editor

Info Editor will retain all existing information from the Legacy Certificates and any available data will be automatically populated into the Certificate Preview.

If users wish to update while using Certificate Preview, this can be done through Configuration settings in Report Distribution.

If the Certificate Preview is on:

1. Navigate to 'Certificates'
2. Click the certificate settings cog to open Configurations
3. Click 'Info Editor'
4. The Certificate Information Editor will open, and text can be entered to the relevant fields.

Please Note – All information previously stored in Legacy Certificates will automatically carry over into Certificate Preview.
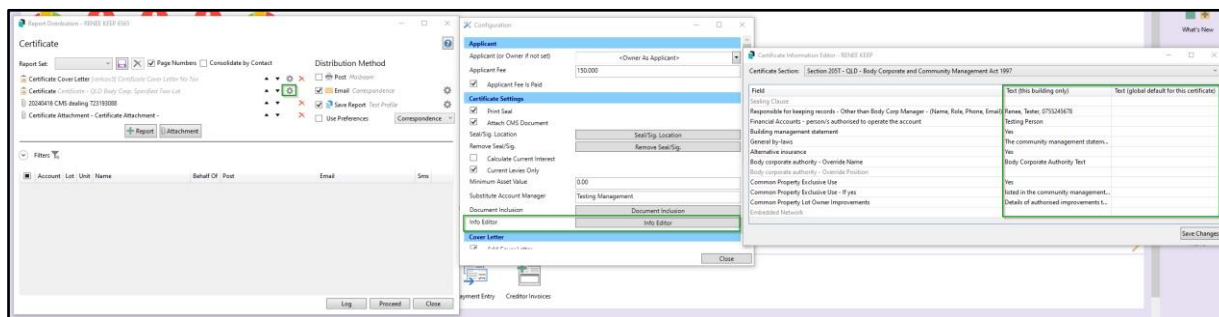
1.3   Producing Certificates utilising Report Distribution

If the Certificate Preview is on:

1. Navigate to Certificates
2. Report Distribution screen will open with Certificates
3. Change any settings needed including any Document inclusions using the Configuration cog
4. The CMS if attached in Building Info will appear on the Report Distribution screen along with the Certificate , Cover Letter and any other attachments that may have already been saved under Document Inclusion
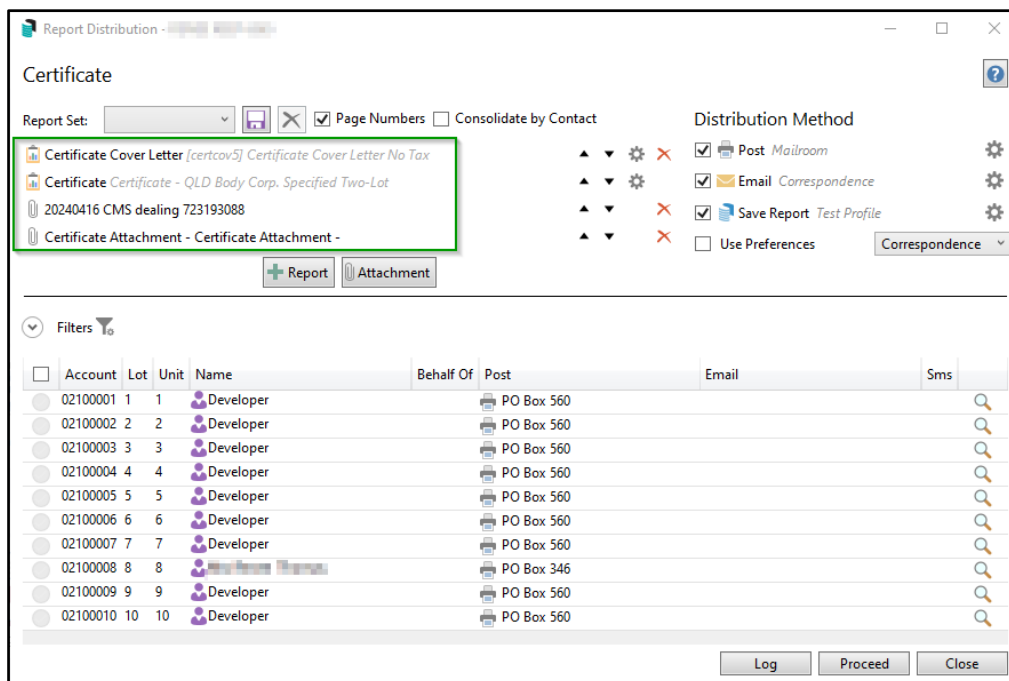
5. Select the Lot the certificate is for
6. Click on Proceed