

Release Notes – Version 5.6.137

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. Inspections Register – Default Inspections

A change has been made to update the Default Inspections drop-down list to be in alphabetical order.

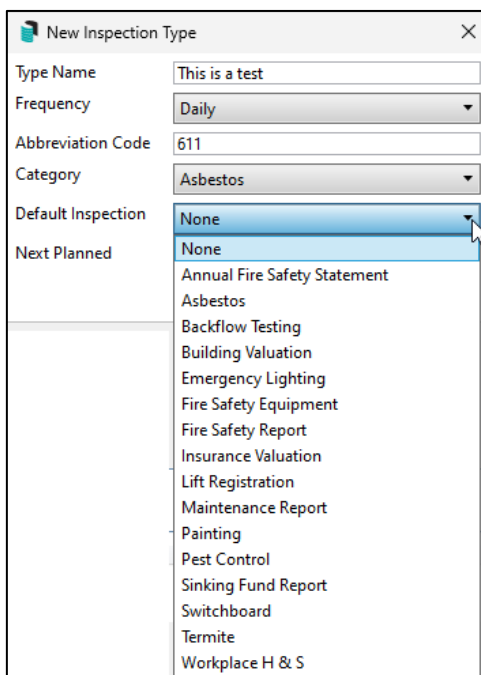
The change affects the following screens:

- Add/Edit Inspection Types
- Search Inspections

To view the Default Inspections list:

1. Navigate to Inspections
2. Add/Edit Inspection Types
3. Add or Edit Inspection Type

The Default Inspection list is in alphabetical order.



The screenshot shows a 'New Inspection Type' dialog box with the following fields and values:

Field	Value
Type Name	This is a test
Frequency	Daily
Abbreviation Code	611
Category	Asbestos
Default Inspection	None (selected)
Next Planned	None

The 'Default Inspection' dropdown menu is open, displaying a list of inspection types in alphabetical order:

- Annual Fire Safety Statement
- Asbestos
- Backflow Testing
- Building Valuation
- Emergency Lighting
- Fire Safety Equipment
- Fire Safety Report
- Insurance Valuation
- Lift Registration
- Maintenance Report
- Painting
- Pest Control
- Sinking Fund Report
- Switchboard
- Termite
- Workplace H & S

4. Navigate to Search Inspections
5. Add Default Inspection type as a field

The Default Inspection list is in alphabetical order.

The screenshot shows the 'Search Inspections' window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. Below these is a table with columns 'Field', 'Condition', and 'Value'. The 'Field' column has a dropdown menu with 'Current Building', 'Type Code', and 'Default Inspection Type'. The 'Condition' column has a dropdown menu with 'is equal to'. The 'Value' column has a dropdown menu with a list of inspection types. The 'Default Inspection Type' field is selected, and the list of inspection types is displayed in a dropdown menu. The list includes: Annual Fire Safety Statement, Asbestos, Backflow Testing, Building Valuation, Emergency Lighting, Fire Safety Equipment, Fire Safety Report, Insurance Valuation, Lift Registration, Maintenance Report, Painting, Pest Control, Sinking Fund Report, Switchboard, Termite, and Workplace H & S. Below the table, there is a section titled '2 records displayed' with a table showing two records:

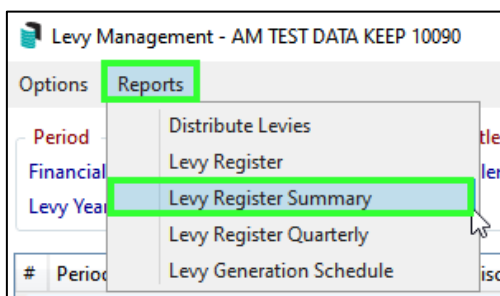
Type Code	Type Name	Category
601	POOL CERTIFICATE	Swimming Pools
601	POOL CERTIFICATE	Swimming Pools

2. Levy Management – Levy Reports.

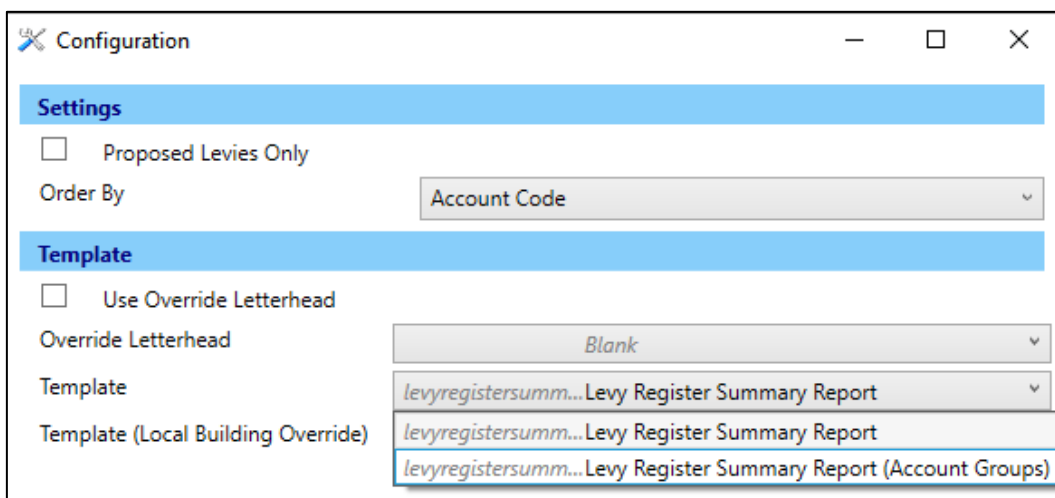
Enhancements have been made to Levy Management Reports to include the Levy Register Summary in the Report menu and show 'Proposed' on Levy Register templates when 'Proposed only is ticked'.

2.1 Levy Register Summary Report

The Levy Register Summary Report has been added to the Levy Management Report Menu. Navigate to Levy Management and click the Reports menu icon to open the Levy Register Summary Report in Report Distribution mode.



Click the configuration cog to set report configurations and set the default template or set the template for Account Groups.

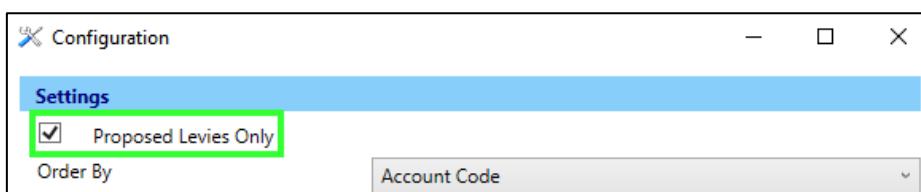


2.2 Proposed Levies Only templates update.

The Levy Register Report templates have been enhanced to show 'Proposed' when 'Proposed Levies Only' is set in the configuration for the following reports.

- Levy Register Summary
- Levy Register
- Levy Register Quarterly

Set 'Proposed Levies Only' in the configuration screen



When the report is run, the title will show 'Proposed'

- Levy Register Summary

Page 1		PROPOSED LEVY REGISTER SUMMARY						31 July 2025	
Strata Plan No. 10090									
Levy Year		Last Annual General Meeting	Entitlements			Total Number of Lots	Financial Year		
Start	End						Start	End	
01/01/2026	31/12/2026	17/02/2025	200.0000			15	01/01/2025	31/12/2025	
Description	Period	Determined	Rate per U/E	Due Date	Discount Rate	Discount Date	Notice Date	Schedule	Total

- Levy Register

Page 1		PROPOSED LEVY REGISTER					31 July 2025	
Strata Plan No. 10090								
Levy Year		Last Annual General Meeting	Entitlements	Total Number of Lots	Financial Year			
Start	End				Start	End		
01/01/2026	31/12/2026	17/02/2025	200.0000	15	01/01/2025	31/12/2025		

- Levy Register Quarterly

Proposed Levies									
Strata Plan No. 10090									
Lot	Unit	Fund	01/01/26 to 31/03/26	01/04/26 to 30/06/26	01/07/26 to 30/09/26	01/10/26 to 31/12/26	Total		


3. ACT Rental Certificate – Insulation Status

From 1st July the [Unit Titles \(Management\) Rental Certificate Determination 2025](#) came into effect, which made amendments to provide further clarity about what units are required to provide for ceiling insulation information.

Enhancements have been made to add 'Class B – Not Applicable' to the Lot Edit Insulation Status found in the Roll for correct reporting on the Rental Certificate.

3.1 Setting Insulation Status – Class B- Not Applicable

To set the Insulation Status to 'Class B – Not Applicable' follow the below steps:

- Navigate to 'Roll'
- Select a Lot
- Click on the Lot  to edit the Lot information selected
- Click 'Insulation Status' drop down

5. Select 'Class B – Not Applicable'
6. This will populate the field as per below

The screenshot shows the 'Lot Edit' dialog box in the StrataMax application. The 'Insulation Status' dropdown menu is open, and 'Class B - Not Applicable' is selected. The 'Copy Insulation' button is highlighted in blue. The dialog box also contains fields for Lot Number, Unit Number, Plan Number, Title/Reference, Lot Address, Effective Date, and Insulation R-Value.

7. Copy Insulation using the button option 'Copy Insulation'
8. Select Lots to copy setting to
9. Click 'OK'

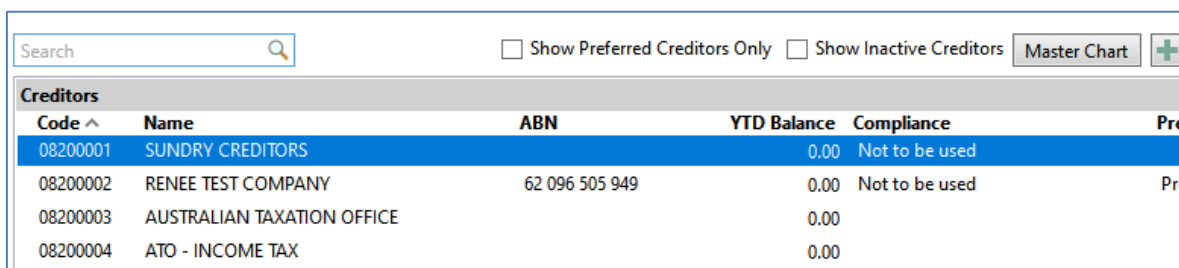
The screenshot shows the 'Account Code List' dialog box in the StrataMax application. The 'Copy Insulation' button is highlighted in blue. The 'Account Code List' table shows a list of lots with their respective codes and names. The table has columns for Code, Name, Lot, Unit, Plan, and YTD.

Code	Name	Lot	Unit	Plan	YTD
02100001	Bernadine Elamin	1	1	33	
02100002	Ming Tharston	1	2	33	
02100003	Ming Tharston	2	3	33	
02100004	Gracie Pecot	3	3	33	
02100005	Yuhon Kazan	4	3	33	
02100006	Hymen Hegeman	5	3	33	
02100007	Hymen Hegeman	6	3	33	
02100008	Joseph Cousins	7	7	33	

4. DocMax – Selection Changes

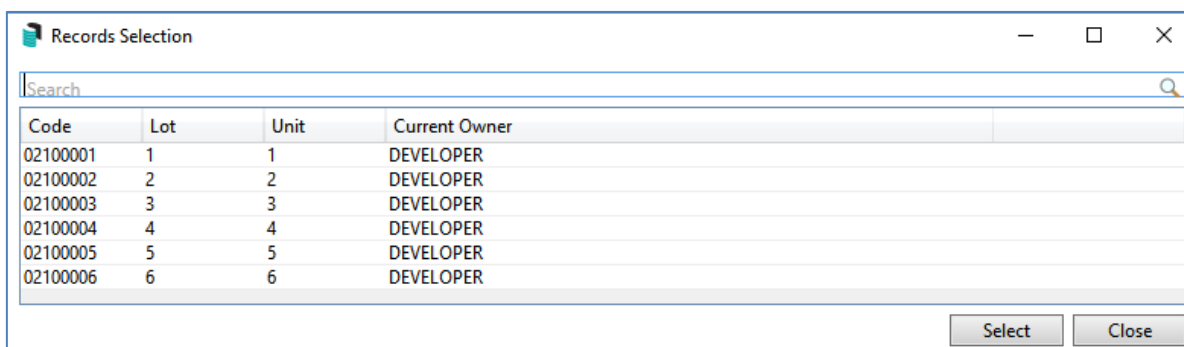
The following field value selectors have been enhanced for better performance and stability in Document Searches and Properties.

- Creditor selection – Creditors can now be selected from Master Chart if applicable.



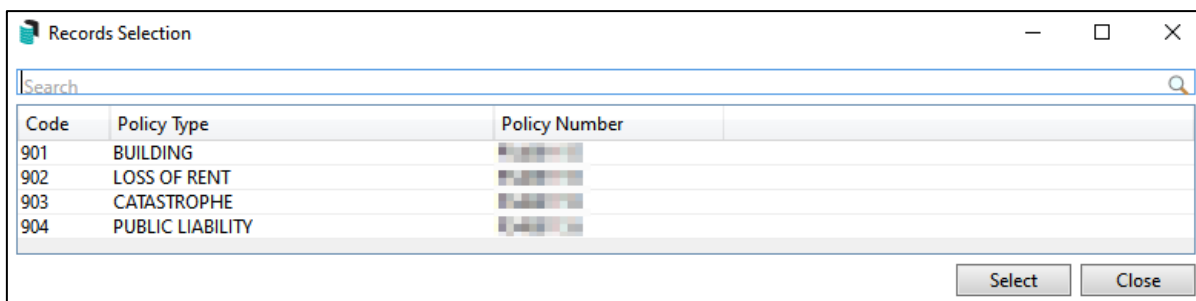
Code ^	Name	ABN	YTD Balance	Compliance	Pre
08200001	SUNDRY CREDITORS		0.00	Not to be used	
08200002	RENEE TEST COMPANY	62 096 505 949	0.00	Not to be used	Pr
08200003	AUSTRALIAN TAXATION OFFICE		0.00		
08200004	ATO - INCOME TAX		0.00		

- Lot selection



Code	Lot	Unit	Current Owner
02100001	1	1	DEVELOPER
02100002	2	2	DEVELOPER
02100003	3	3	DEVELOPER
02100004	4	4	DEVELOPER
02100005	5	5	DEVELOPER
02100006	6	6	DEVELOPER

- Insurance Policy selection



Code	Policy Type	Policy Number
901	BUILDING	
902	LOSS OF RENT	
903	CATASTROPHE	
904	PUBLIC LIABILITY	

- Insurance Claim selection

Records Selection

Search

Code	Reference Name	Insurance Number
00000001	GARBAGE DISPOSAL UNIT L5	901
00000002	WATER DAMAGED KITCHEN - LOT 6	901
00000003	WATER DAMAGE - LOT 4	901

Select Close

- Invoice Items Expense Account selection – Accounts can now be selected from the Master Chart if applicable.

Search Master Chart +

Expense - Admin Fund

Code ^	Name	YTD Balance	Budget
12103	INCOME TAX	0.00	200.00
12104	TAX RETURN PREPARATIONS	0.00	180.95
122	BANK CHARGES	3.55	30.00
1221	STRATAPAY FEES	0.00	0.00
12401	ADMINISTRATION AGREEMENT	1,376.88	2,753.76
12402	ADMINISTRATION AGREEMENT - ADD	272.00	240.00
12403	DISBURSEMENTS	74.25	220.00

Count: 81 OK Cancel

- Assigned To selection. Deleted/disabled users can no longer be selected but will be shown and can be searched if previously assigned to

Records Selection

Search

Name	First Name	Surname	Department
StrataMaxSupport11			
StrataMaxSupport2	Support	User	
StrataMaxSupport3			
StrataMaxSupport4			

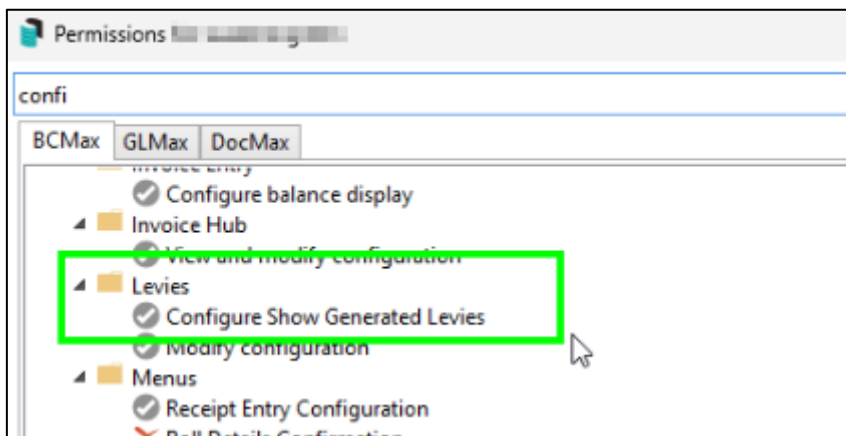
Select Close

5. New Security Option

5.1 Levies – Show Generated Levies

A new security option has been added to for “Show Generated Levies’ configuration.

Navigate to Security Setup, right click user or user group and search ‘Configure Show Generated Levies’ to see the permission.



6. Preview Features

This release introduces another two (2) more preview features for the following modules:

- StrataMax Building Uploads (StrataMax)
- New Subgroup Manager (New Sub-Group and Delete Subgroup)

Users will have the ability to switch between the two (2) interfaces, Legacy versus new as needed if permissions are granted to a user to do so.

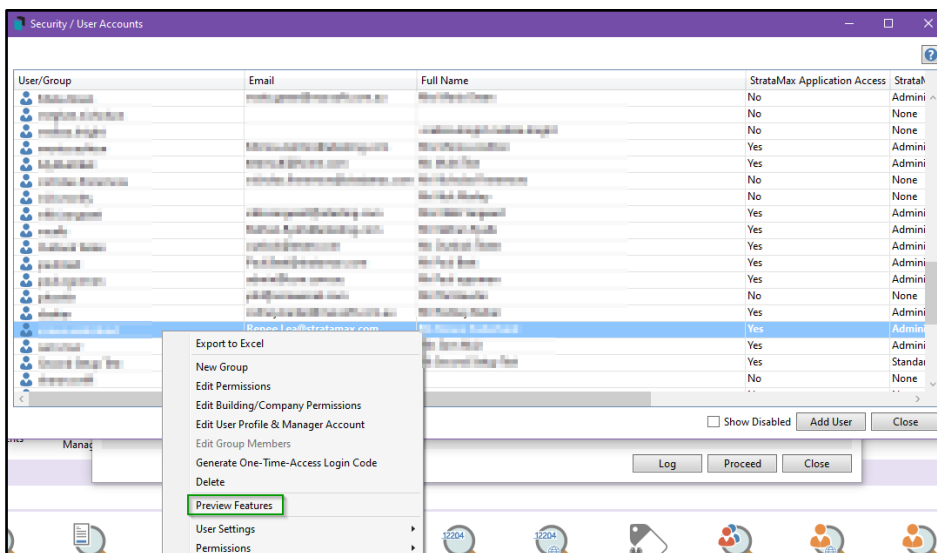
Administrators can grant access to the ‘Change Preview Feature’ allowing users to choose between the existing Legacy modules and the new Preview Features.

6.1 Security Settings to grant access

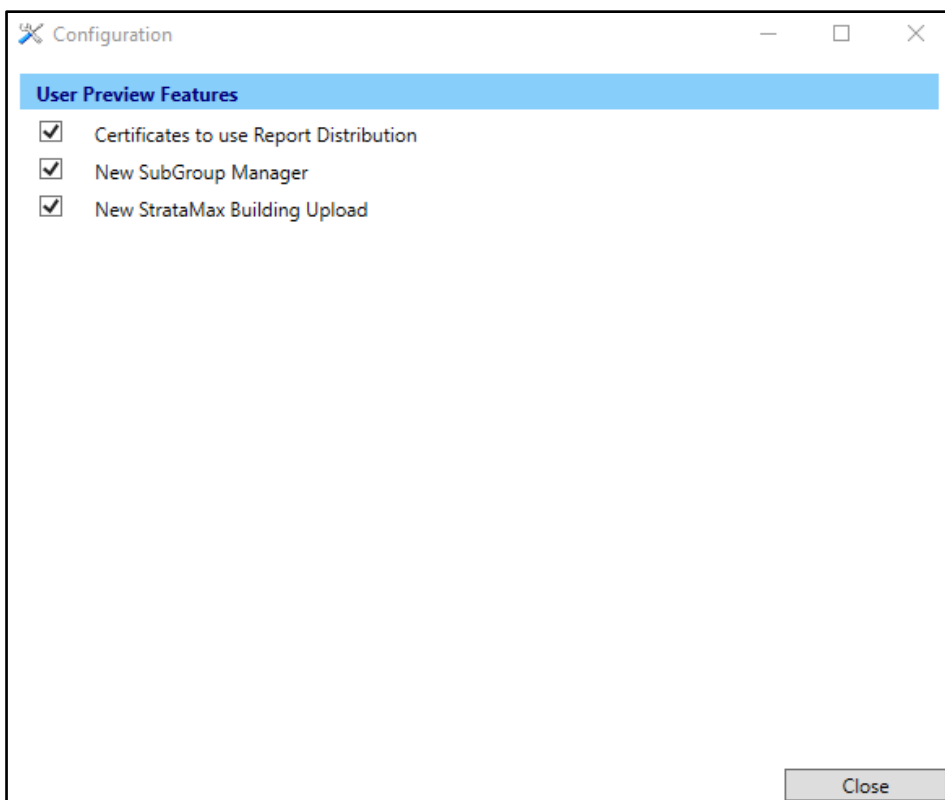
A new security permission ‘Change Preview Features’ has been introduced to control user access to switch between Legacy Certificate view and the Certificate Preview. When this permission is enabled, users will be able to toggle between the two interfaces as needed.

6.1.1 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 or off at the user level.

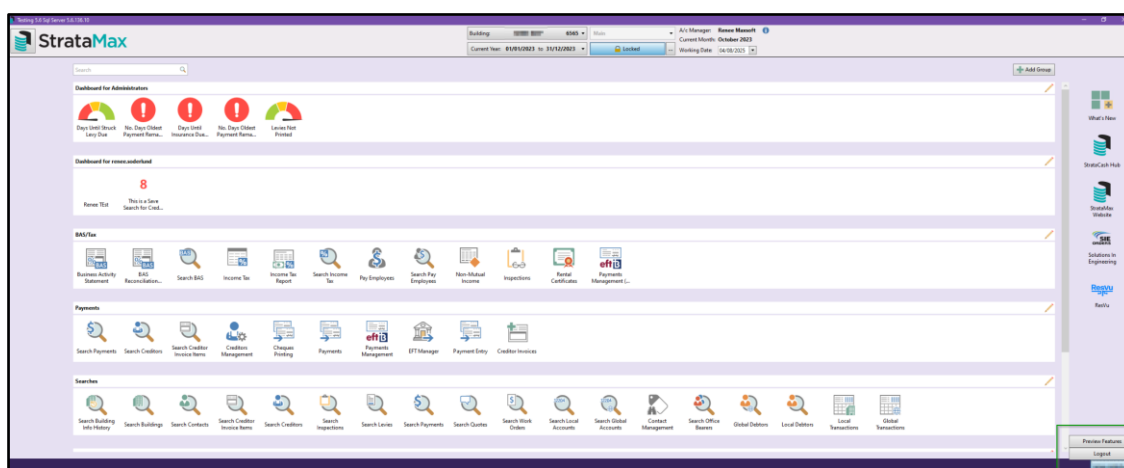


Please Note – By default, the new Preview Features will be enabled on upgrade

6.1.1 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 and new Preview modes without the need to go through the security settings.

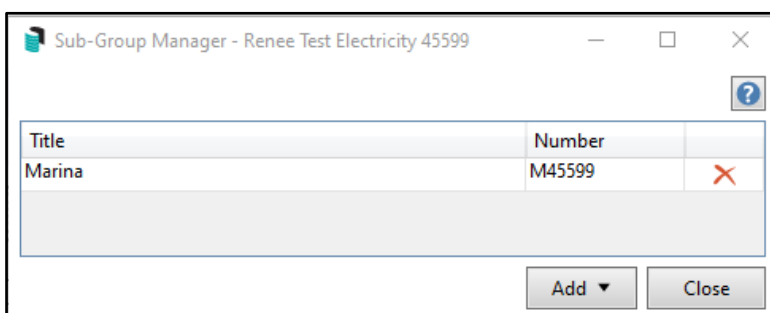


Please Note – By default, users are granted access to switch between Legacy Certificate and Certificate Preview modes.

6.2 New Subgroup Manager

When a user has Sub-Group Manager Preview feature enabled and selects either 'New Sub-Group' or Delete Subgroup' the new Sub-Group Manager user interface will automatically launch.

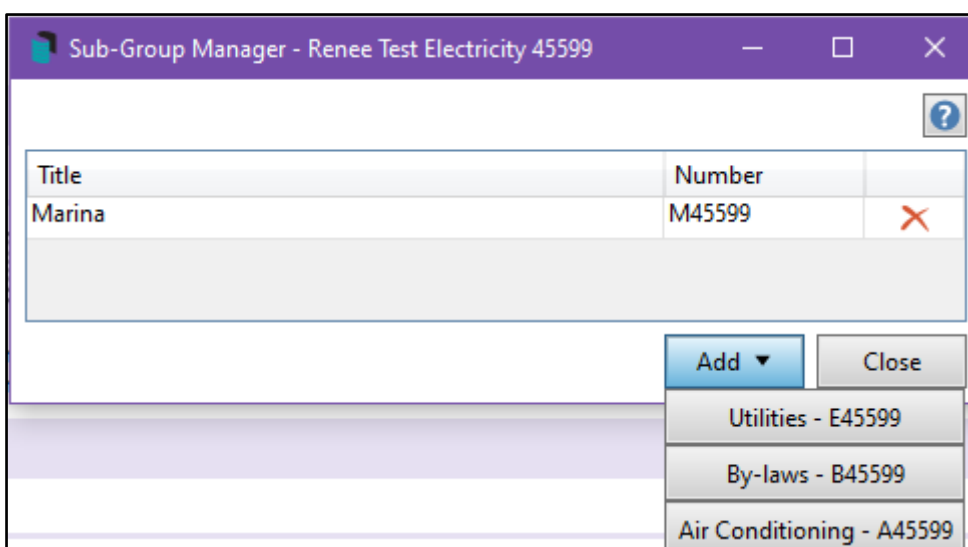
Please Note – If a sub-group has already been set up, it will be displayed on the screen as shown below.



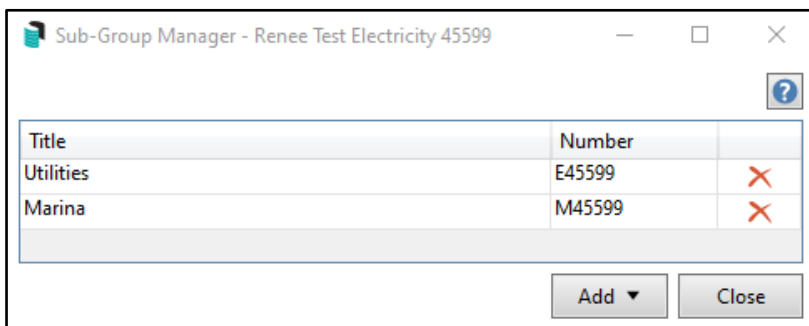
6.2.1 Creating a New Sub-Group using the Sub-Group Preview Feature

To create a new sub-group using the Sub-Group Preview feature, follow the below steps:

1. Navigate to 'New Sub-Group' option
2. A new user interface will be displayed
3. Click on the 'Add' button
4. A drop-down list will appear.



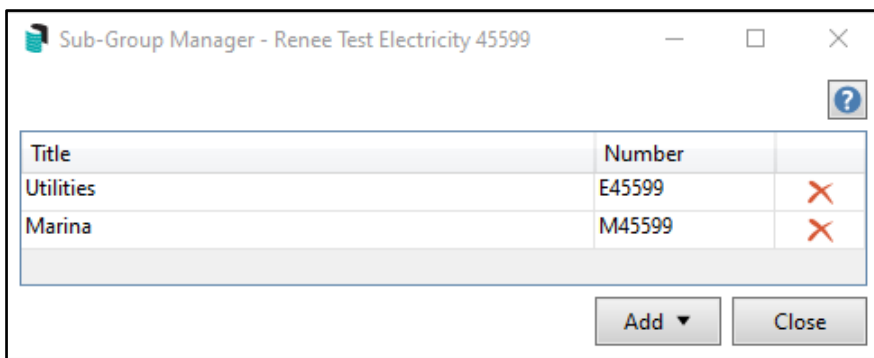
5. Select the Sub-Group type to be added
6. The Setup Sub-Group Debtors options will be presented, providing the same options as the legacy interface:
 - Emulate All Lots – Copies all Lots from the main to the sub-group
 - Emulate Selected Lots – Enables users to select specific lots from an account code list that will be displayed
 - No Lot Emulation – Creates the new sub-group without copying any debtors from the main.
7. Once configured, the Sub-group will be created and will appear within the Sub-Group Manager form.




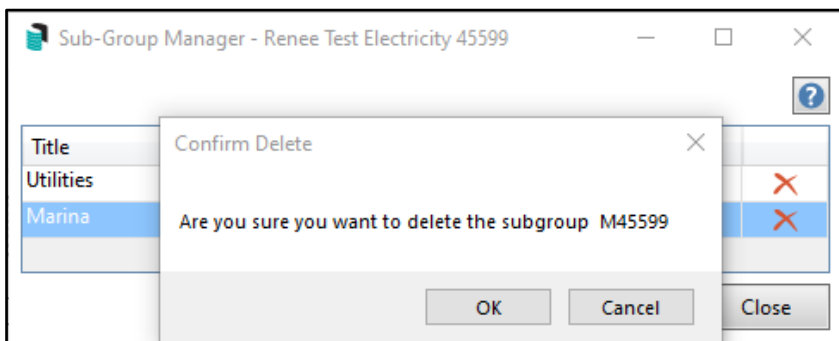
6.2.2 Deleting a Sub-Group

To delete a sub-group using the Sub-Group Manager Preview feature, follow the below steps:

1. Navigate to 'Delete Sub-Group'
2. A new user Interface will be displayed



3. Click on Delete Option 
4. Message will display to confirm the deletion

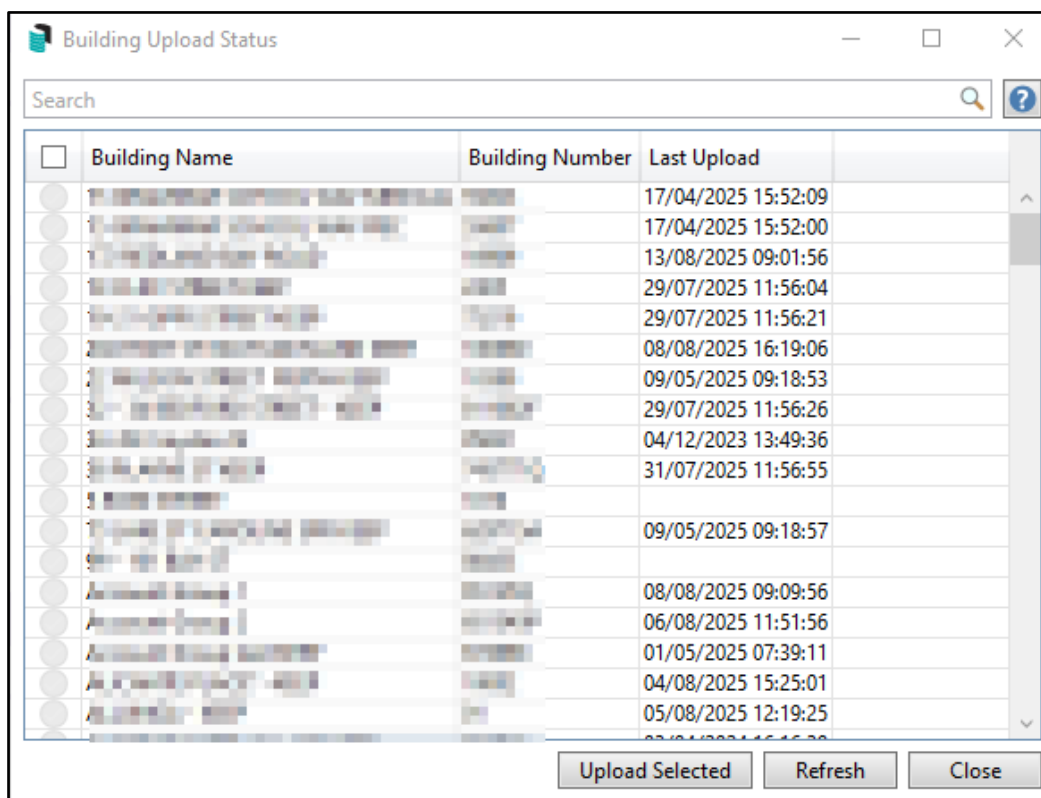


5. Click on Ok to delete Sub-group
6. Sub-group will no longer display or be accessible for the selected building

Please Note – If the delete permissions is denied for the user or user group, the delete option will not be available

6.3 New StrataMax Building Upload

When a user has the New StrataMax Building Upload Preview feature enabled and selects 'StrataMax' the new user interface will automatically launch.



6.3.1 Selecting a building For Upload

Follow the below steps to upload a Building to StrataMax

1. Open the Building Upload module 'StrataMax'
2. Select a building in the list
3. Click on Upload Selected
4. The buildings will be uploaded

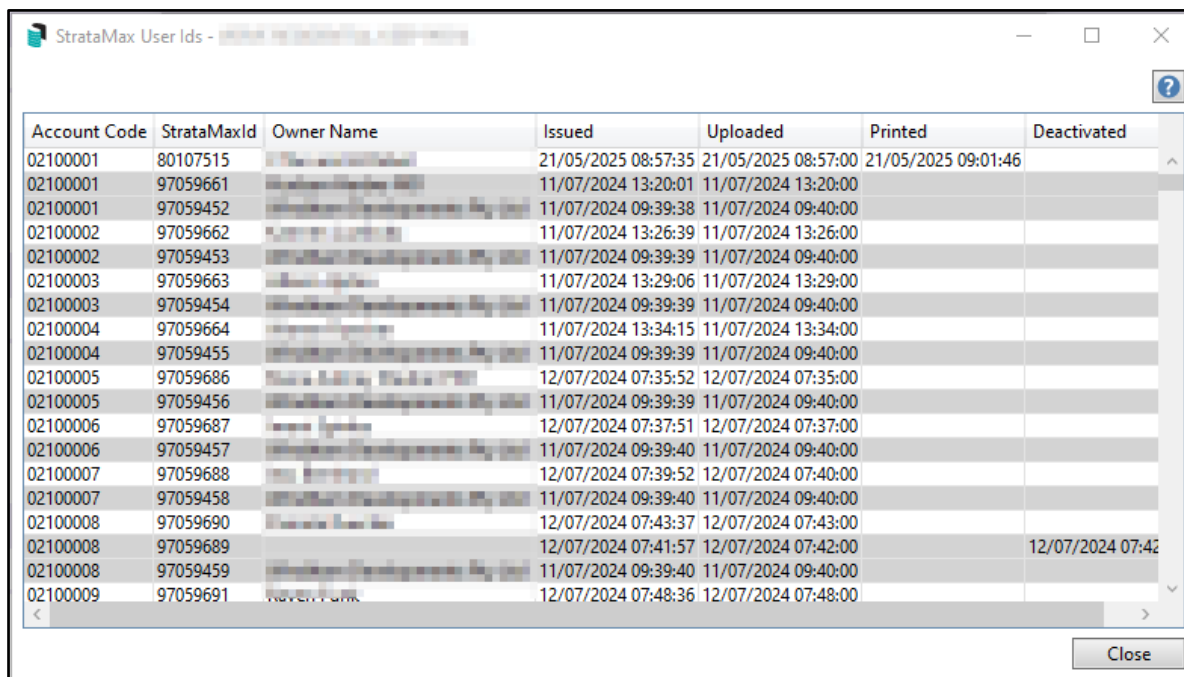
Please note – Click the refresh option to update the Last Uploaded dates and times.

Global and Master Chart options are also available to select and upload

6.3.2 View StrataMax User ID's

Follow the below steps:

1. Open the Building Upload module 'StrataMax'
2. Right Click on a Building that is showing in the List
3. Select 'StrataMax User IDs'
4. The StrataMax User ID's and history will be presented.



The screenshot shows a window titled "StrataMax User Ids" with a table containing the following columns: Account Code, StrataMaxId, Owner Name, Issued, Uploaded, Printed, and Deactivated. The table lists 19 rows of user data, including account codes, IDs, owner names, and timestamps for when the user ID was issued, uploaded, printed, and deactivated.

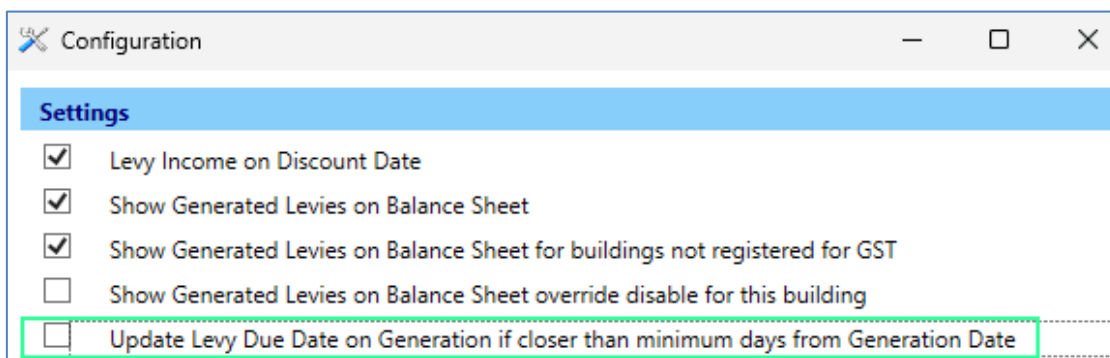
Account Code	StrataMaxId	Owner Name	Issued	Uploaded	Printed	Deactivated
02100001	80107515	StrataMax User	21/05/2025 08:57:35	21/05/2025 08:57:00	21/05/2025 09:01:46	
02100001	97059661	StrataMax User	11/07/2024 13:20:01	11/07/2024 13:20:00		
02100001	97059452	StrataMax User	11/07/2024 09:39:38	11/07/2024 09:40:00		
02100002	97059662	StrataMax User	11/07/2024 13:26:39	11/07/2024 13:26:00		
02100002	97059453	StrataMax User	11/07/2024 09:39:39	11/07/2024 09:40:00		
02100003	97059663	StrataMax User	11/07/2024 13:29:06	11/07/2024 13:29:00		
02100003	97059454	StrataMax User	11/07/2024 09:39:39	11/07/2024 09:40:00		
02100004	97059664	StrataMax User	11/07/2024 13:34:15	11/07/2024 13:34:00		
02100004	97059455	StrataMax User	11/07/2024 09:39:39	11/07/2024 09:40:00		
02100005	97059686	StrataMax User	12/07/2024 07:35:52	12/07/2024 07:35:00		
02100005	97059456	StrataMax User	11/07/2024 09:39:39	11/07/2024 09:40:00		
02100006	97059687	StrataMax User	12/07/2024 07:37:51	12/07/2024 07:37:00		
02100006	97059457	StrataMax User	11/07/2024 09:39:40	11/07/2024 09:40:00		
02100007	97059688	StrataMax User	12/07/2024 07:39:52	12/07/2024 07:40:00		
02100007	97059458	StrataMax User	11/07/2024 09:39:40	11/07/2024 09:40:00		
02100008	97059690	StrataMax User	12/07/2024 07:43:37	12/07/2024 07:43:00		
02100008	97059689	StrataMax User	12/07/2024 07:41:57	12/07/2024 07:42:00		12/07/2024 07:42
02100008	97059459	StrataMax User	11/07/2024 09:39:40	11/07/2024 09:40:00		
02100009	97059691	StrataMax User	12/07/2024 07:48:36	12/07/2024 07:48:00		

7. Levy Management – "Override Levy Generation Due Date Validation"

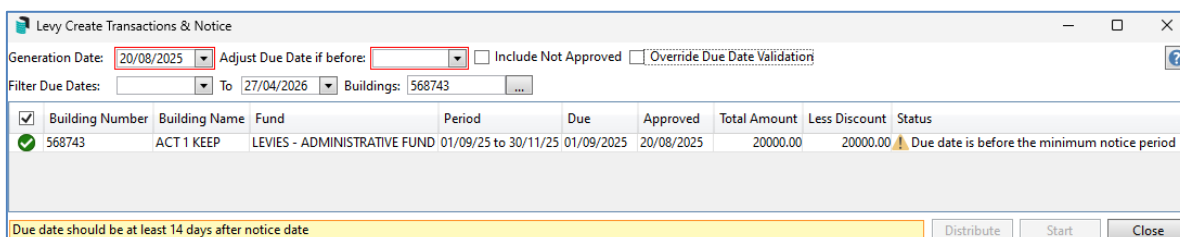
To cater for exceptions where levy due dates fall outside the legislative requirement days, we have added an option in the Create Transactions and Notices screen to override the due date validation. A new security setting is available to manage access to the override.

7.1 "Override Levy Generation Due Date Validation"

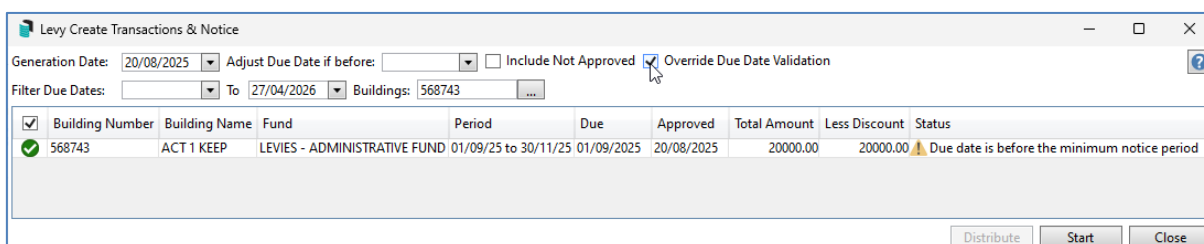
The setting "Override Levy Generation Due Date Validation" can be set when validation prevents generation and the "Update Levy Due Date if closer then minimum days from Generation Date" is **not** set in the configuration.



Without override – validation prevents generation.



With override – Validation is overridden.



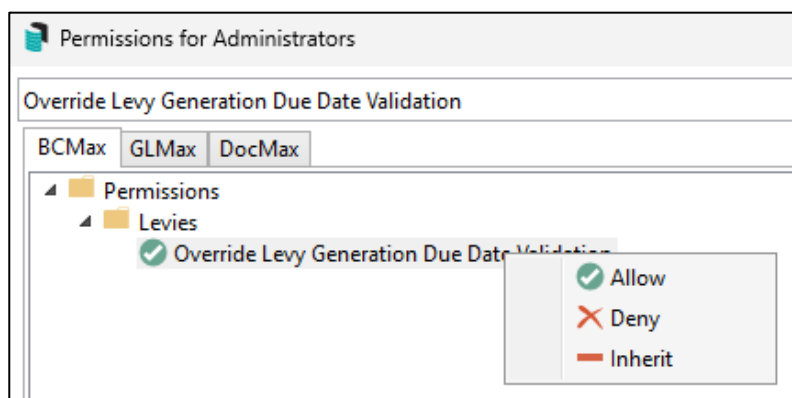
Note: If "Update Levy Due Date if closer then minimum days from Generation Date" is set in the configuration, due dates will be updated to the date set in Create Transactions and Notices

7.2 "Override Levy Generation Due Date Validation" Security Setting

A new security setting is available in Security Setup to manage access to the "Override Levy Generation Due Date Validation" Option. To apply permissions for this setting please see the steps below:

1. Navigate to Security Setup
2. Select the User or User Group you want to set up.
3. Right Click the User or User Group

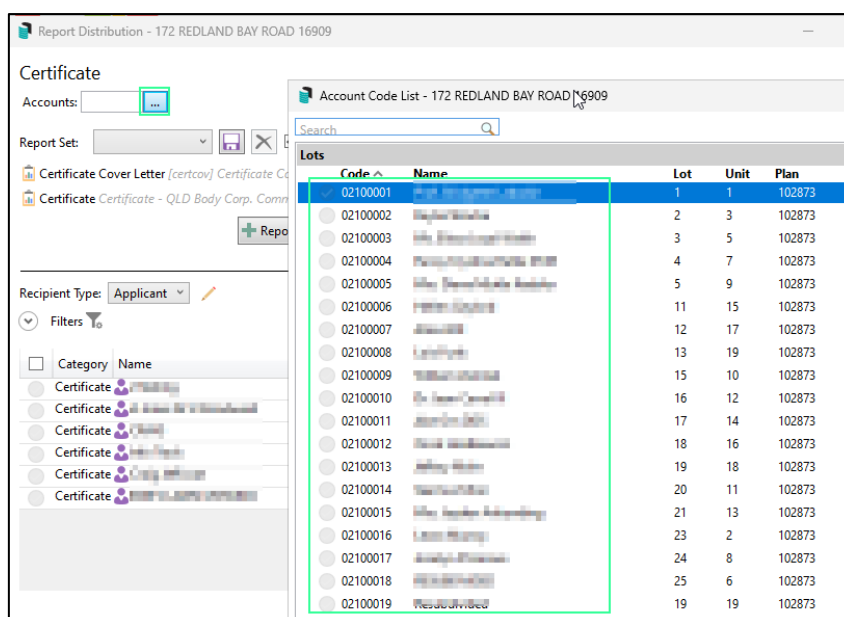
4. Click Edit Permissions
5. In the filter type “Override Levy Generation Due Date Validation”
6. Right Click the permission and set Allow, Deny or Inherit



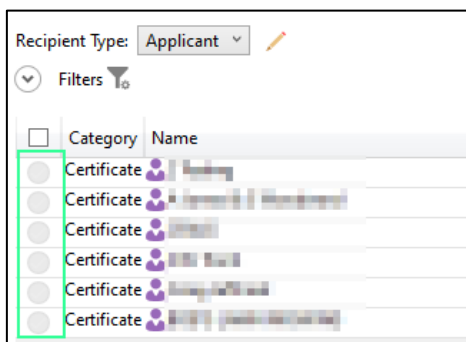
Note: Administrator Group permissions will default to ‘Allow’
User Group permissions will default to ‘Not Set’

8. Certificates – Account Selection

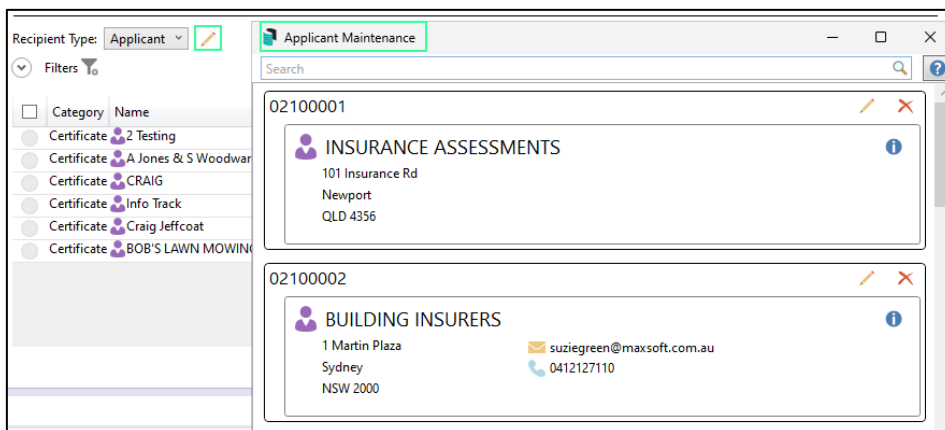
Account selection has been added to Certificates. This will determine which lot/s a certificate will be produced for. Click the selector beside Accounts and set the required account.



Select the Applicant in the recipient window.



In the recipient's section, when the Applicant type is selected an Applicant Maintenance icon now appears. Click the Applicant Maintenance icon to open Applicant Maintenance from the Certificate screen.



What's Better

- Local / Global Transactions – After viewing a transaction with more than one Transaction Fund Breakup, the search was sometimes showing wrong amounts in the running balance column.
- Disclosure Statement – has been disabled as it is no longer valid after 1st August 2025.
- Owner's Tax Year Report – If the Lot Plan number is different from the Building Plan number, the Lot Plan number will appear on the second page of the report.
Example 'Property: Building Format Plan No. 123456'
- Account Maintenance – Account Groups – Copying Account Changes to other buildings when applying to Master Chart and Buildings will no longer change or unset the Account Group.
- DocMax – Work Queues – Error was generating when editing Building Number where Is Any Of is set.
- DocMax – Saved Searches – The Added From restriction field was not loading saved values when using the Is Any Of / Is Not Any of condition.
- Inspections – Error was generating when deleting a Creditor that was attached to an Inspection.
- Levy Management – Rate per U/E column will now display 8 decimal places
- Levy Arrears – Period Start Date from Interest/Arrears Fee Lines crash will now be prevented.
- Contact Management – Was not recognising when contacts were added to an Inspection, and an error was generating when deleting unreferenced contacts or merging duplicate contacts.
- Solutions IE – Solutions IE Logo is no longer required to be displayed on the StrataMax desktop, the option is still accessible via the menu options
- Certificate Preview – When a report set was set up and selected with a CMS also attached to the Building Information it was causing the system to crash. This has now been resolved
- Certificate Preview – The Recipient Type will now default to Applicant list set to Category 'Certificate'
- Certificate Preview – The ability to add Global Seal/Signature has been added to certificates for states where a generic seal & / or signature can be used on certificates. Any building specific seal/signature will override the global.
- Task Management – When entering more than one Checklist to a schedule and clicking save the system was crashing. This has now been resolved
- Qld Certificates – Template and Formatting enhancements