Release Notes – Version 5.6.139

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.   Levy Management Enhancements

1.1   Zero Levies

A new option is now available when creating manual levies in Levy Management to allow zero-dollar value levies. Use the flowing steps to create a zero levy.

1. Navigate to Levy Management
2. Click 'Add'
3. Click 'Manual'
4. Set the Gross Amount as 0.00 – the Zero Levy option will then be enabled.

5. Tick the 'Zero Levy' Option

6.   Save

A Zero Levy will be created and can then be Approved and Generated and Printed from Create transactions and Notices. (See Configuration below).

1.2   Levy Notice Configuration – Show Zero Amount Levies

Levy Notices can now be configured to show zero amount levies. Navigate to Levy Management / Reports / Distribute and click the configuration cog beside the Levy Notice template.

Setting this will show zero amount levies on the Levy Notice when run from Levy Management distribution.

Note: This is a global setting. The setting will default to 'On' when upgraded to this version.

1.3   Net Rate Per U/E Column

The Net Rate Per U/E Column has been re-introduced into the Levy Management Screen.

1.4 Budget amount for GST Net Style buildings

The Budget (Current) amount for GST Net Style buildings will now display the Net amount, and the amount including GST.


1.5 Levy Management - Report Distribution

A new configuration option is now available to allow users to choose if the postal address is included on a Levy Notice where there are split contacts with the same email address and Levy Notice preference is set to email. This will use the first contact postal address for the notice.

Navigate to Levy Management / Reports / Distribute and click the Levy Template configuration cog to see and or set the new option.
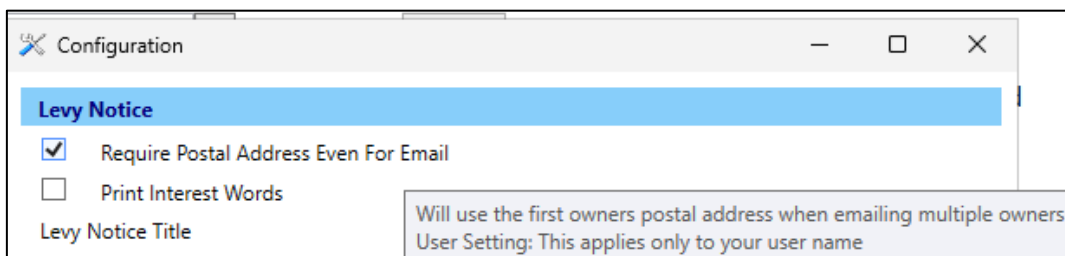
Note: This is a global setting. The setting will default to 'On' when upgraded to this version.

2.   Merge Letter Email Template – Report Name Field

An additional field called "Report Name" is now available for selection in the Correspondence (Merge Letter) email template. The new field can be selected in Merge Letters / Correspondence as a once off or can be added to the Merge Letter email Template.

2.1   Merge Letters

To set the Report Name field temporarily for a letter or report, use the following steps.

1.   Navigate to Merge Letters (or Report Distribution) and click the configuration cog for Email.

2.   Ensure Correspondence is set as the Email Preference.
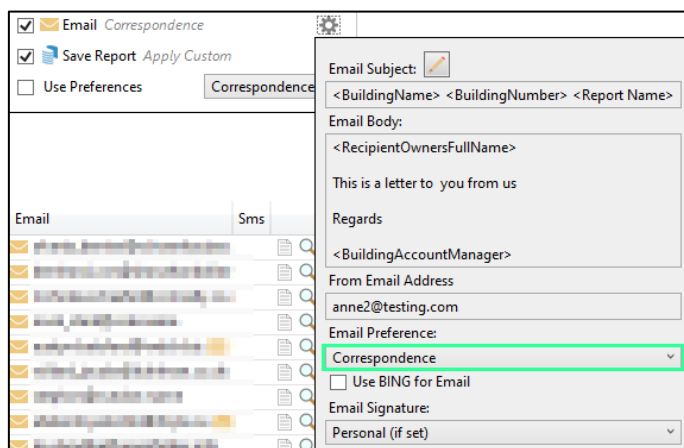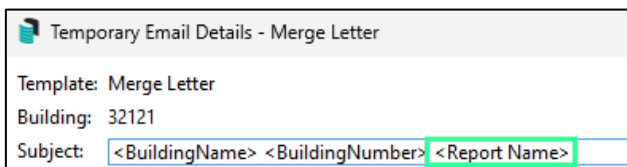
3. Click the edit icon beside "Email Subject"
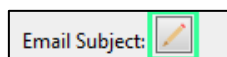
4. Click into the area the field should be added (E.g. Subject or Body)
5. Click Insert Field
6. Select 'Report Name' Field
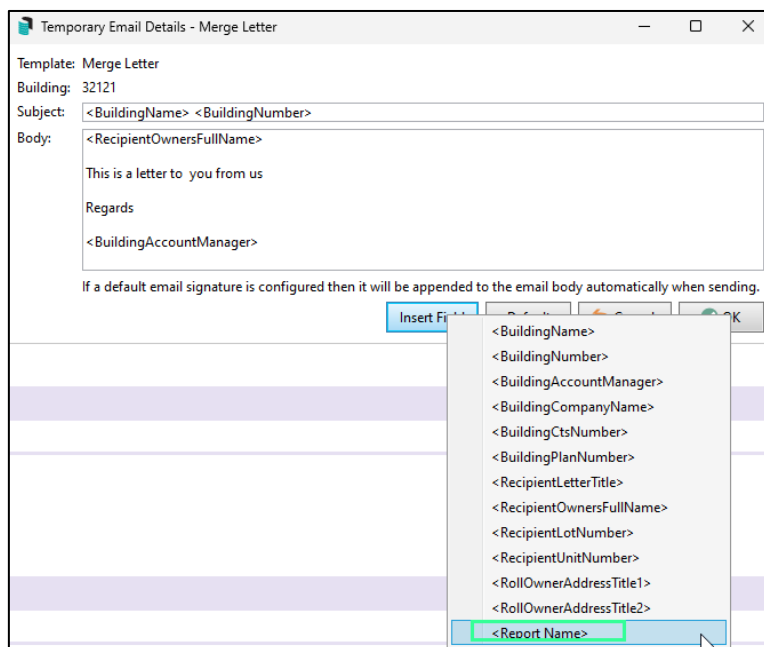
The report name field will be added to the template and will populate the report name in the email.

2.2   Email Template Manager

To set the Report Name field permanently for correspondence, use the following steps.

1. Navigate to Email Template Manager
2. Set the Template Type as Merge Letter.
3. Click the Edit Icon for the Merge Letter email template.
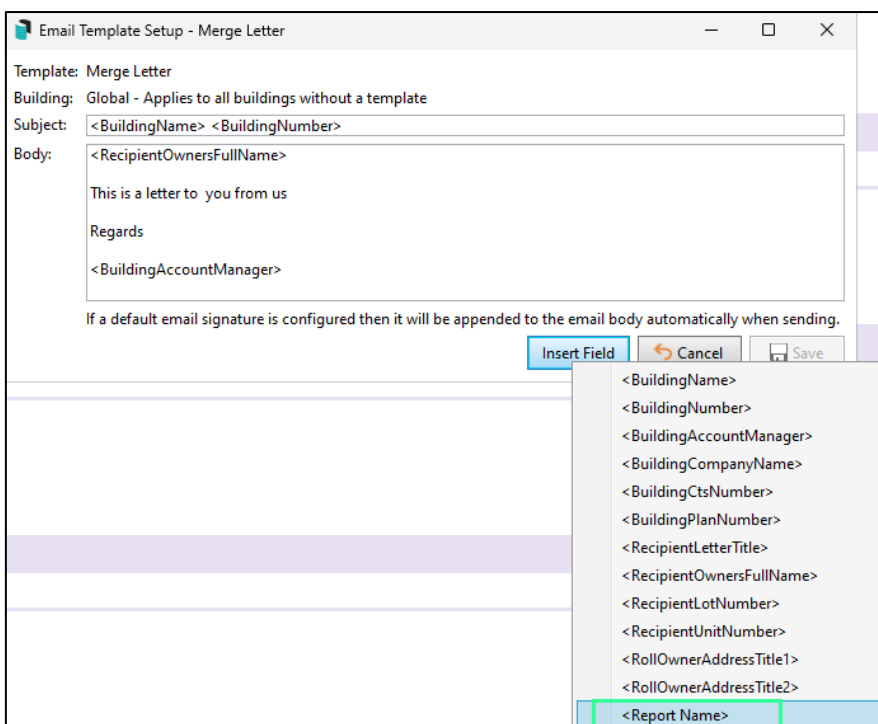
4. Click into the area the field should be added (E.g. Subject or Body)
5. Click Insert Field
6. Select 'Report Name' Field

The report name field will be added to the template and will populate the report name in any emails sent using the template.
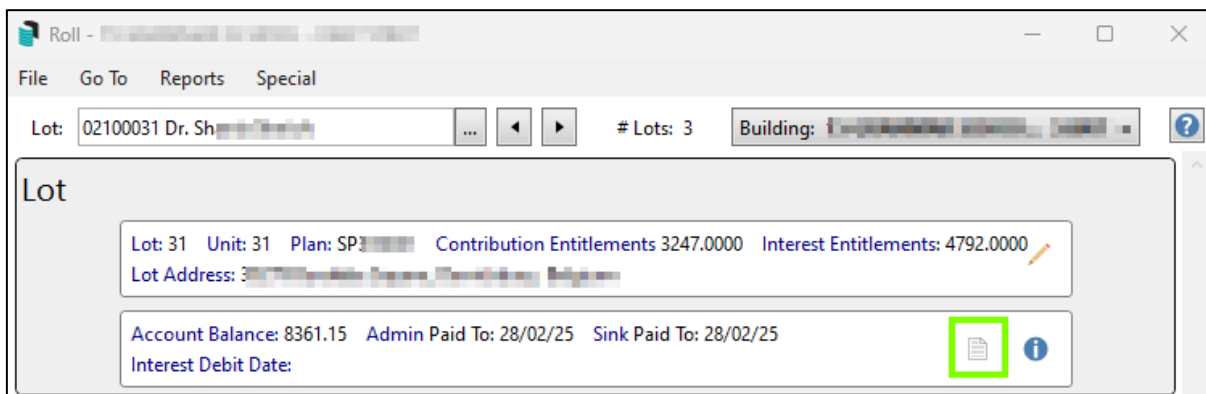
The report name can be derived in several ways.

- If one Merge Letter is selected, the report name will populate the Description name of the Merge Letter
- If more than one Merge Letter is selected, the report name will populate the Description name of the last Merge Letter selected.
- If a Report Set is selected with no Merge Letter, the Report Name will populate the name of the Report Set
- If a Report Set is selected with a Merge Letter, the Report Name will populate the Description name of the Merge Letter.

3.   Roll – Lot Documents

The order of the Lot Document column headings has been changed. This will allow clients to view the Email Recipient without using the scroll bar.

1. Navigate to Roll
2. Select a Lot Owner
3. Click document button.
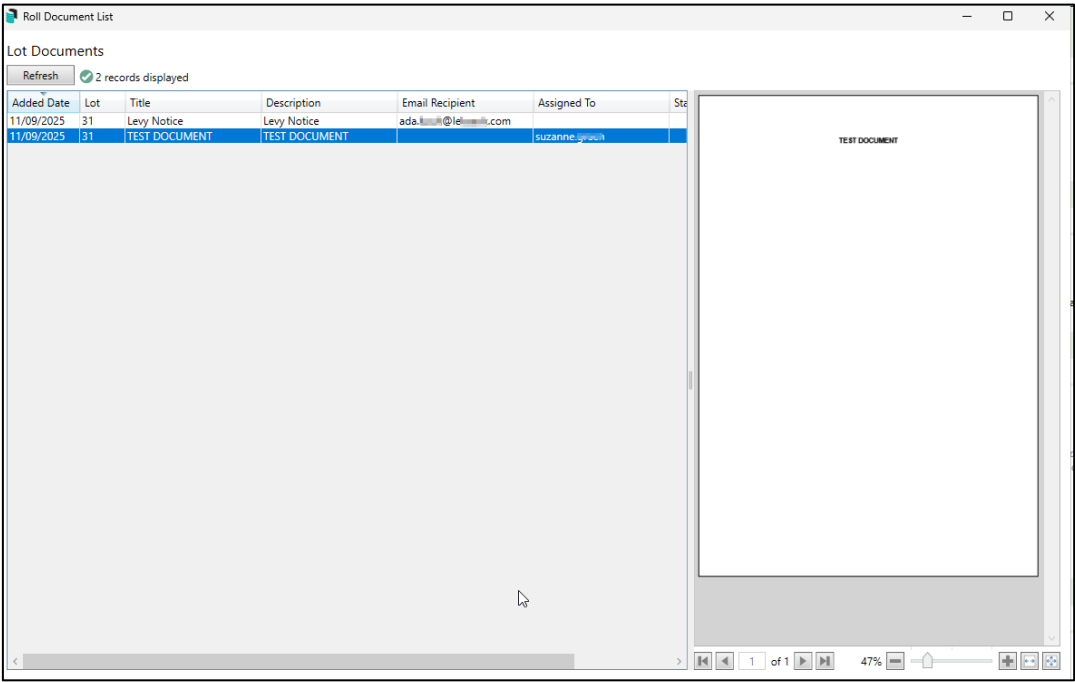
4. Report Distribution – Search Recipient

A new search feature is now available that allows users to search by selected Recipient type. This makes it easier to quickly locate Recipient and use the arrow provided to continue to the next record that matches the search. All Recipient types will now support this enhanced search functionality.
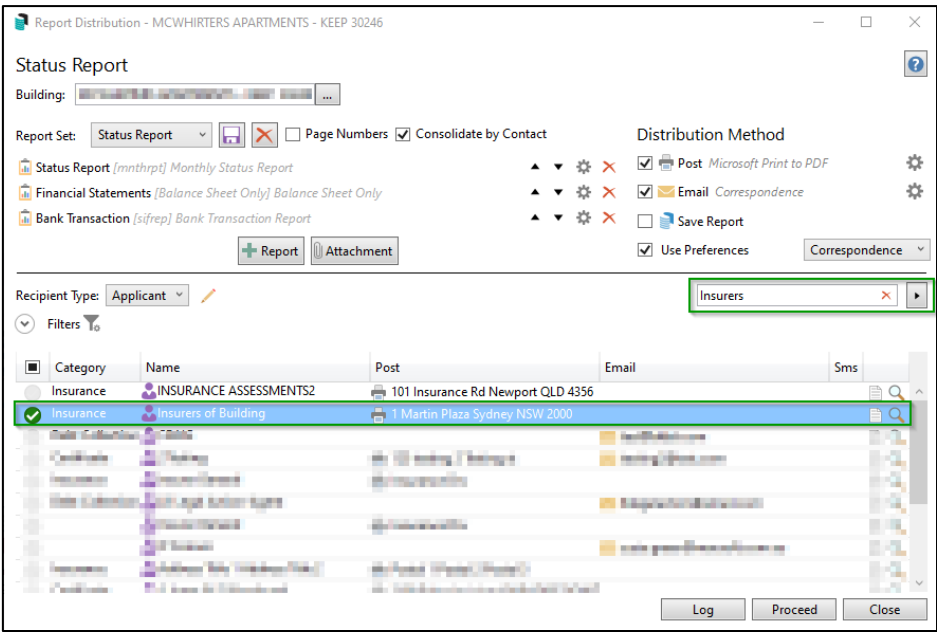
Please Note – the search function when entering Alpha characters will only return records for, Lot numbers, Unit Numbers, Email Addresses and Addresses. The Account field is excluded from the search.

5.   Search Insurance – Commission fields added

Two fields have been added to the Search Insurance Function:

- Commission Last Amount
- Commission Last paid.
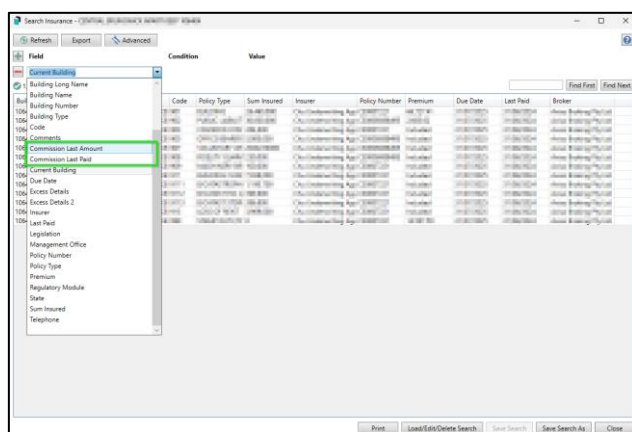
These fields can be displayed, sorted, and used for filtering results.

Please Note - the new search fields will <u>not</u> be displayed in the results list by default. The user can add and position the columns using the Advanced option/ Column selection i.e. adding them to the Displayed Columns selection.
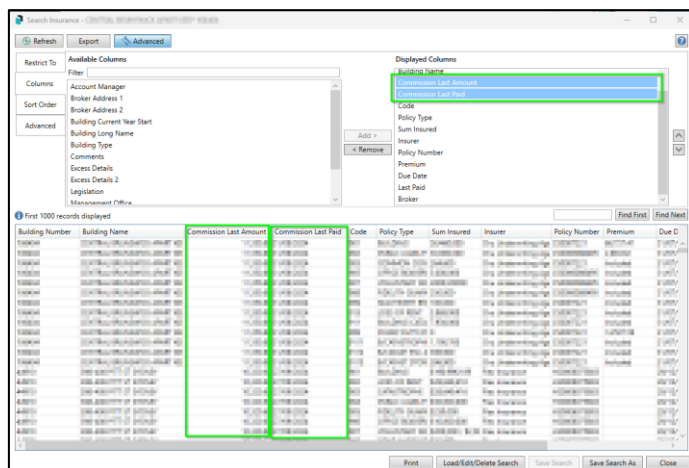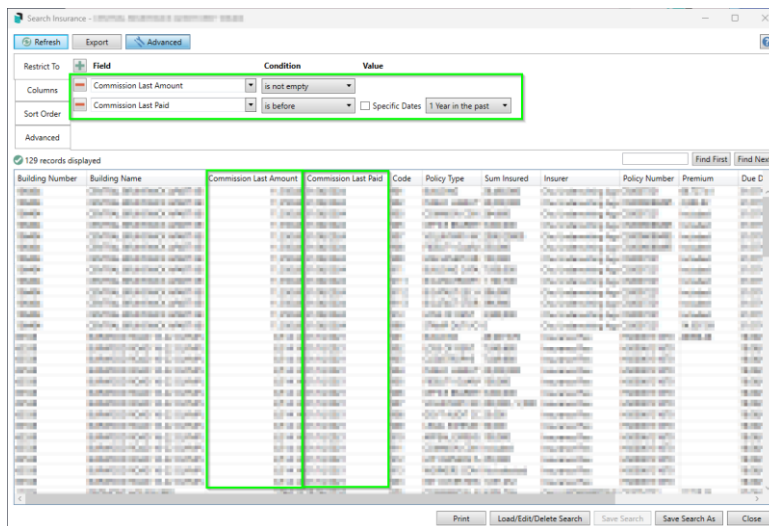
6. Preview Features – New Stored Reports

A new Preview Feature is introduced with his release which will open Stored Reports in a new interface if configured. Enhancements for the new feature include:

- Ability to review all stored reports in one place. This means reports that were previously stored in Stored Reports that are now stored in DocMax will be available in the one place. E.g. Levy Notices from Levy Notices and Reports as well as Notices sent from Levy Management. Other reports available are Certificates, Levy Arrears Notices, Ledger Cards, Status Reports and Month End Financials.
- Report documents can be previewed in the same window.
- Reports can be resent or reprinted.
- Reports can be opened in DocMax to view document properties.
- Reports can be searched or filtered by Account, Report Name, Email Recipient or Date
- Select multiple reports using CTRL Shift
- Re-arrange columns in the display

6.1.1   Accessing Configuration from Username

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.' Tick "New Stored Report Screen' and click Close.
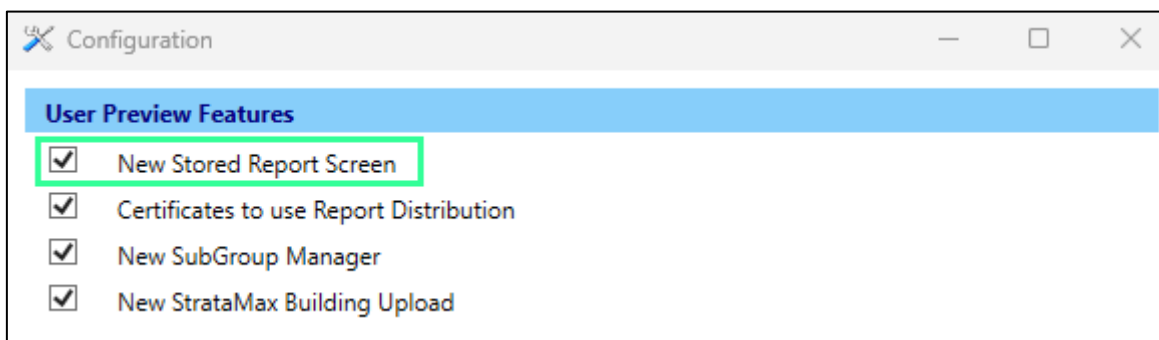
Please note: If access to Stored Reports is currently denied in Security Setup, new Stored Reports will not be available for selection in the BCMax menu.

Once configured, search and select Stored Reports to open the new module. Click a report in the search results screen on the left to preview the associated document.

Some reports will have a grey background – these are reports that are currently stored in the old Stored Reports module.

Reports that have a white background are reports that have been sent to DocMax and are not stored in the old Stored reports module.

6.2   Search and Filter options

6.2.1   Search

Click into the search filter and start typing to highlight a report or report type. The search can look for a Report Name, an email recipient, a Lot, or Unit. Click the arrow next to the search field to move to the next record in the search.

Search	Levy Notice	×	▶	⊗

| Date & Time	Report	Account
29/05/2025 10:43:13 AM	Levy Notice	02100001
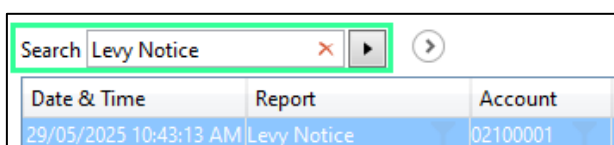
6.2.2   Filter Options

Filter options can be displayed by clicking the ⊗ icon beside the Search field. Stored reports can also be filtered by right clicking & selecting filter on a specific field for a report.

Search	Search	🔍	▶	⊗

This will expand filter options.

Search	Search	🔍	▶	⊗	Account:	...	×	Report:		Dates:	18/03/2025	▾	to		▾	Email:	
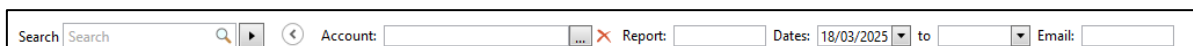
- Filter By Account – Click the Account selector ellipses to select a specific account to filter. Reports for the selected Account only will be presented.
- Filter by Report – Type a Report name into this field to display specific report types only.
- Filter by Date – Set a Date range to display reports by date.
- Filter by Email – Enter an email address to display reports sent to a specific email address.

In the results window, reports can be filtered by type and account.

Click the filter icon beside Report to filter by the selected report type.

Click the filter icon beside Account to filter results for that account only.

6.3   Right Click Options Menus

6.3.1   Old Style Stored Reports

Right Click an old-style report (grey background) to review the options menu for these reports.

Options available are:

- Filter – This will filter results for the selected report type and account.
- Clear Filters – This will clear the filter and display all results.
- View Document Properties – This will open the document in DocMax where properties can be viewed or modified.
- Send Again – This will popout option to resend the report.

- Compose Email will open the Communications module in Compose mode with the selected report attached.
- Print Selected Items will open the print preview screen. Reports can be re-printed from this screen.
 - Delete Document – This will delete the selected document.

6.3.2   New Style Stored Reports

Right Click a new-style report (white background) to review the options menu for these reports.
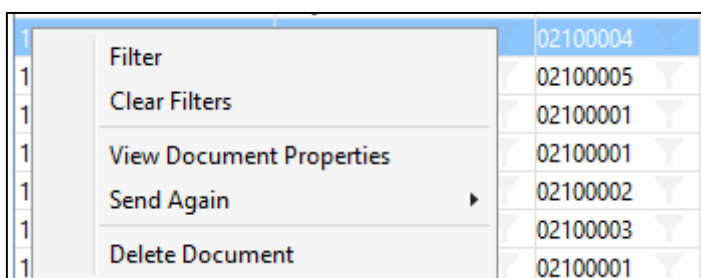

Options available are:

- Filter – This will filter results for the selected report type and account.
- Clear Filters – This will clear the filter and display all results.
- View Document Properties – This will open the document in DocMax where properties can be viewed or modified.
- Send Again – This will popout option to resend the report.
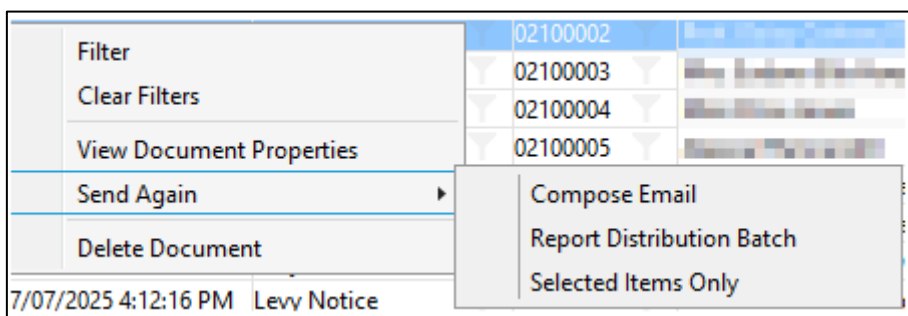
- Compose Email will open the Communications module in Compose mode with the selected report attached.
- Report Distribution Batch will open the original batch the report was sent with in Report Distribution.
- Selected Items Only will open the Selected report/s only in Report Distribution. **Please Note:** This option is only designed to be used where multiple new-style reports are selected.
  - Delete Document – This will delete the selected document.

6.4   Re-arrange Display Columns

The column display order can be re-arranged by clicking the column heading and dragging to the optimal position in the results window.

Note: changing column headers will not be retained when closing and reopening Stored Reports.

Drag to required position
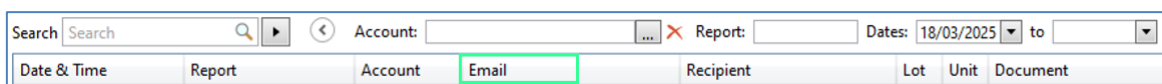
7.   New menu Item – Meeting Summary

To streamline the way users, access the meeting details from the Building Information more efficiently, an enhancement has been done to support faster navigation and improved usability for users managing meeting related tasks.

A new menu item has been added that opens the existing meeting window, replicating the behaviour of the Meetings buttons found in Building Information window.
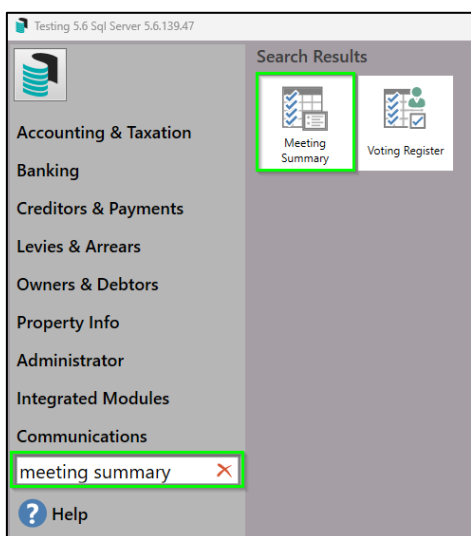
8.   Report Distribution – New Owner Roll Details

New Owner Roll Details reports are now available in Report Distribution to include when producing a certificate. The following templates will be available for selection:

- rollnew
- rollnew1 (No Company Title)
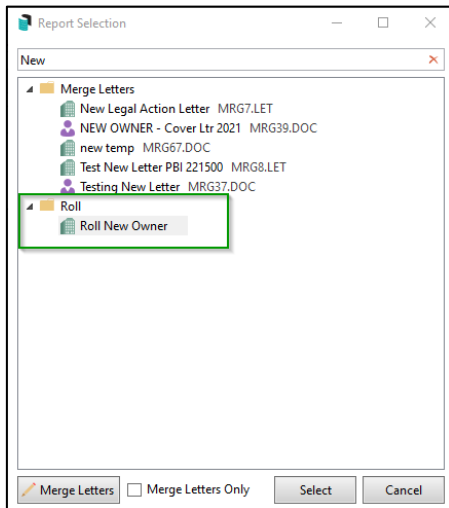
9. Qld Certificates – Levy Periods for all Levies

Levy periods have been added to the following Qld Certificates

- Certificate – Qld Body Corporate Community Mgt Act – Form 33
- Certificate – Qld Body Corporate Specified Two-Lot – Form 34
- Certificate – Building Units Group Trust Act – Form 18

Please Note – this will not apply to special levies because for these the period is generally the due date.

The template will be released the week commencing 29th September 2025.

What's Better

- Levy Management - Null reference exception on Levy Invoice Code Setup has been resolved.
- Roll – When selecting a Lot and error was occurring if other menu buttons were clicked at the same time.
- Transaction List – Contra Name Column was not being populated with extra text for Journal entries.
- Levy Management - Distribute Levies - Levy Notice will no longer print Debtor Invoice Reversals
- Levy Management - Delete or modifying an un-generated levy where re-subdivision has been initiated and cancelled will no longer generate an error.
- Report Distribution – BING Printer selection validation has been resolved.
- Roll – system error was occurring when updates to Lot Owners were being made, before previous updates saved. This has been resolved by disabling the edit button until updates are saved.
- Levy Management – system error occurred when Levy Management select without a building. Levy Management option is now disabled until a building is selected.
- Global Transactions – Filtering by Current year was excluding buildings with Current year only. This has been resolved.
- Levy Management Reports - Levy Generation Schedule report configuration, deselecting all buildings was not saving. This has been resolved.
- Certificate 184 – Utility outstanding amounts were not reporting on the Certificate under section 11. This has now been resolved.
- Levy Management - Manual Levies - Period Dates will now Recalculate when Entering Levies for O/Cs
- Report Distribution - Levies printing from Distribute will now match the levies automatically tagged for printing after generation.
- Levy Management -Report distribution for levies only when Levies are set to go to the Agent, and the Owner has a Levy Notice Address set now matches when running Levy Notice from Levy Reports/Notices
- Levy Management - We have reintroduced net rate per U/E column in the Levy Management screen.
- Certificates - When Producing Certificates via Report Distribution to an Applicant the DocMax record will now populate the Lot it refers to, so it appears in the Lot Documents attached to the Roll.
- DocMax/Work queues - after saving a document with a creditor, the creditor code can sometimes show on the new document. This has now been resolved
- Levy Management - Levy Notice - Special Purpose Reason was not being produced on notice when run in Report Distribution

- Certificate Qld - Form 34 - Incorrect sign on bank balance in two lot scheme certificates. This has now been corrected.
- Report Distribution Levy Notice – where there were two Lot Owners with the same address, two Levy notices were being printed. This has been resolved.
- Levy Management – Old levies with a status of cancelled were appearing on the approval screen, this has been resolved.
- Report Distribution - When a lot had two owners with the same address, and their preferences were set to both Email and Post, two levy notices were being printed. This has been corrected.
- Levy Management - Distribute Levies Arrears Amount Net Due amount will now match Actual Amount.
- DocMax – Issues while Adding New Documents has been resolved.
- Qld Certificate - Summary of Accounts / Other Levies Paid in Advance - Not Yet Due were not reporting in the Summary correctly.
- Levy Notices and Reports - Levy Notice was being skipped for lots with 0.1 to 0.5 entitlements. This is resolved.
- DocMax - Error removing a category for bulk documents has been resolved.
- Income Tax Reports – The UI was reporting different values compared to Prepare Income Tax report. This has now been corrected
- Report Distribution - When distributing levies two notices can print for the same Lot when the preview indicated that only one would be printed - only one copy is generating now
- Report Distribution - Levy Notice - Annual Levy Amount was not being calculated Lnote_106
- DocMax - Tabbing when a profile is applied to a document and work queues with tab stops was stopping at Assigned To, Lot Account and Creditor Account when not set in tab stops for profiles and work queues.