

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



What's New.....	3
1. Levy Management Enhancements	3
1.1 Zero Levies.....	3
1.2 Levy Notice Configuration – Show Zero Amount Levies.....	4
1.3 Net Rate Per U/E Column.....	4
1.4 Budget amount for GST Net Style buildings.....	5
1.5 Levy Management – Report Distribution.....	5
2. Merge Letter Email Template – Report Name Field.....	6
2.1 Merge Letters.....	6
2.2 Email Template Manager.....	8
3. Roll – Lot Documents.....	9
4. Report Distribution – Search Recipient.....	10
5. Search Insurance – Commission fields added	11
6. Preview Features – New Stored Reports.....	12
6.2 Search and Filter options.....	14
6.3 Right Click Options Menus.....	15
6.4 Re-arrange Display Columns.....	17
7. New menu Item – Meeting Summary	18
8. Report Distribution – New Owner Roll Details.....	18
9. Qld Certificates – Levy Periods for all Levies.....	19
What's Better.....	20

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.

Create Levy - Zero Dollar levies 457144

Invoice Code: 01 Admin Fund Regular

Entitlement Schedule: Contribution Entitlements (Entitlements: 5.0000)

Period: 01/05/2026 To 31/07/2026

Due Date: 01/05/2026 Due in 232 days

Gross Amount per U/E: 0.00 Gross Total Amount: 0.00

Rate 0 x 5.0000 entitlements (with rounding) = Gross Total 0.00

☒ Zero Levy

Discount Rate (%): 0

Please specify levy amount via either Rate per U/E or Gross Total

View Save Cancel

5. Tick the 'Zero Levy' Option

Create Levy - Zero Dollar levies 457144

Invoice Code: 01 Admin Fund Regular

Entitlement Schedule: Contribution Entitlements (Entitlements: 5.0000)

Period: 01/05/2026 To 31/07/2026

Due Date: 01/05/2026 Due in 232 days

Gross Amount per U/E: 0.00000000 Gross Total Amount: 0.00

Rate 0 x 5.0000 entitlements (with rounding) = Gross Total 0.00

☒ Zero Levy

Discount Rate (%): 0

View Save Cancel

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).

01 Admin Fund		Total: 37,500.00	Less Discount: 37,500.00	Budget (Current): -30,000.00	Budget (Next): 0.00	Instalments: 5 / 4	
1	01/10/25 to 31/10/25	0.00000000	0.00000000	01/10/25	0.00	11/09/25	11/09/25 Contribution Entitlements 0.00 0.00
<div>Reverse Edit View Lot Charges</div>							
2	01/11/25 to 31/01/26	3,000.00000000	3,000.00000000	01/11/25	0.00	11/09/25	11/09/25 Contribution Entitlements 15,000.00 15,000.00
3	01/02/26 to 30/04/26	3,000.00000000	3,000.00000000	01/02/26	0.00	11/09/25	11/09/25 Contribution Entitlements 15,000.00 15,000.00
4	01/05/26 to 31/07/26	1,500.00000000	1,500.00000000	01/05/26	0.00	11/09/25	11/09/25 Contribution Entitlements 7,500.00 7,500.00
6	01/05/26 to 31/07/26	0.00000000	0.00000000	01/05/26	0.00		Contribution Entitlements 0.00 0.00

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.

Levy Notice	
<input type="checkbox"/>	Require Postal Address Even For Email
<input type="checkbox"/>	Print Interest Words
<input checked="" type="checkbox"/>	Show Zero Amount Levies

1.3 Net Rate Per U/E Column

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

Options Reports											
Period			Entitlements			Levy Year Totals			View		
Financial Year: 01/05/2025 to 30/04/2026			Contribution Entitlements: 7,000			Total: 35,446.25			Group By Levy Name		
Levy Year: 01/05/2025 to 30/04/2026			Interest Entitlements: 7,000			Less Discount: 28,357.00			<input type="checkbox"/> Show Historical Levies		
#	Period	Rate per U/E	Net Rate per U/E	Due Date	Discount Rate	Discount Date	Generation Date	Approved Date	Entitlement Schedule	Total Charge	Less Discount
01 Administrative Fund Total: 29,671.25 Less Discount: 23,737.00 Budget (Current): -29,671.25 Budget (Next): 0.00 Instalments: 4 / 4											
54	01/05/25 to 31/07/25	1,051.25000000	841.00000000	30/05/25	20.00	30/05/25	24/04/25	23/07/24	Contribution Entitlements	7,358.75	5,887.00
										Reverse	Edit View Lot Charges
60	01/08/25 to 31/10/25	1,062.50000000	850.00000000	30/08/25	20.00	30/08/25	28/07/25	05/05/25	Contribution Entitlements	7,437.50	5,950.00
61	01/11/25 to 31/01/26	1,062.50000000	850.00000000	30/11/25	20.00	30/11/25		05/05/25	Contribution Entitlements	7,437.50	5,950.00
62	01/02/26 to 30/04/26	1,062.50000000	850.00000000	02/03/26	20.00	02/03/26		05/05/25	Contribution Entitlements	7,437.50	5,950.00
66	01/05/26 to 31/07/26	1,062.50000000	850.00000000	30/05/26	20.00	30/05/26		28/05/25	Contribution Entitlements	7,437.50	5,950.00
07 Sinking Fund Total: 5,775.00 Less Discount: 4,620.00 Budget (Current): -5,775.00 Budget (Next): 0.00 Instalments: 4 / 4											
59	01/05/25 to 31/07/25	136.25000000	109.00000000	30/05/25	20.00	30/05/25	24/04/25	23/07/24	Contribution Entitlements	953.75	763.00
63	01/08/25 to 31/10/25	228.75000000	183.00000000	30/08/25	20.00	30/08/25	28/07/25	05/05/25	Contribution Entitlements	1,601.25	1,281.00
64	01/11/25 to 31/01/26	228.75000000	183.00000000	30/11/25	20.00	30/11/25		05/05/25	Contribution Entitlements	1,601.25	1,281.00
65	01/02/26 to 30/04/26	231.25000000	185.00000000	02/03/26	20.00	02/03/26		05/05/25	Contribution Entitlements	1,618.75	1,295.00
67	01/05/26 to 31/07/26	231.25000000	185.00000000	30/05/26	20.00	30/05/26		28/05/25	Contribution Entitlements	1,618.75	1,295.00

1.4 Budget amount for GST Net Style buildings

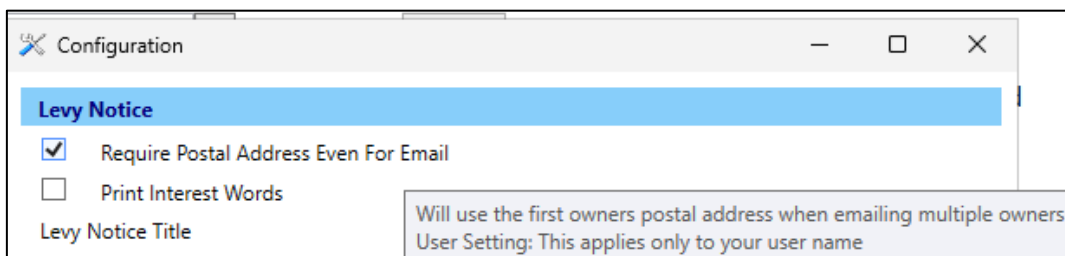
The Budget (Current) amount for GST Net Style buildings will now display the Net amount, and the amount including GST.

Options Reports											
Period			Entitlements			Levy Year Totals			View		
Financial Year: 01/06/2025 to 31/05/2026			Contribution Entitlements: 6786.0000			Total: 886,873.90			Group By Levy Name		
Levy Year: 01/06/2024 to 31/05/2025			Interest Entitlements: 6786.0000			Less Discount: 720,498.74			<input type="checkbox"/> Show Historical Levies		
#	Period	Rate per U/E	Net Rate per U/E	Due Date	Discount Rate	Discount Date	Generation Date	Approved Date	Entitlement Schedule	Total Charge	Less Discount
01 Admin Fund Total: 659,999.88 Less Discount: 527,999.90 Budget (Current): -655,050.00 (Net -595,500.00) Budget (Next): -331,650.00 (Net -301,500.00) Instalments: 4 / 4											
59	01/06/24 to 31/08/24	21,782.000000	17,425.600000	01/06/24	20.00	01/06/24	22/04/24	04/09/23	Contribution Entitlements	147,812.80	118,250.26
										Reverse	Edit View Lot Charges
60	01/09/24 to 30/11/24	21,782.000000	17,425.600000	01/09/24	20.00	01/09/24	22/07/24	04/09/23	Contribution Entitlements	147,812.80	118,250.26
69	01/12/24 to 28/02/25	26,847.500000	21,478.000000	10/12/24	20.00	10/12/24	29/10/24	29/10/24	Contribution Entitlements	182,187.14	145,749.69
70	01/03/25 to 31/05/25	26,847.500000	21,478.000000	01/03/25	20.00	01/03/25	29/10/24	29/10/24	Contribution Entitlements	182,187.14	145,749.69
71	01/06/25 to 31/08/25	24,314.800000	19,451.840000	01/06/25	20.00	01/06/25	17/04/25	29/10/24	Contribution Entitlements	165,000.03	132,000.34
72	01/09/25 to 30/11/25	24,314.800000	19,451.840000	01/09/25	20.00	01/09/25	17/07/25	29/10/24	Contribution Entitlements	165,000.03	132,000.34
07 Sinking Fund Total: 171,874.46 Less Discount: 137,499.28 Budget (Current): -171,875.00 (Net -156,250.00) Budget (Next): 0.00 (Net 0.00) Instalments: 4 / 4											
63	01/06/24 to 31/08/24	6,332.000000	5,065.600000	01/06/24	20.00	01/06/24	22/04/24	04/09/23	Contribution Entitlements	42,969.10	34,375.30
64	01/09/24 to 30/11/24	6,332.000000	5,065.600000	01/09/24	20.00	01/09/24	22/07/24	04/09/23	Contribution Entitlements	42,969.10	34,375.30
73	01/12/24 to 28/02/25	6,331.900000	5,065.520000	10/12/24	20.00	10/12/24	29/10/24	29/10/24	Contribution Entitlements	42,968.13	34,374.34
74	01/03/25 to 31/05/25	6,331.900000	5,065.520000	01/03/25	20.00	01/03/25	20/01/25	29/10/24	Contribution Entitlements	42,968.13	34,374.34
75	01/06/25 to 31/08/25	6,332.000000	5,065.600000	01/06/25	20.00	01/06/25	17/04/25	29/10/24	Contribution Entitlements	42,969.10	34,375.30
76	01/09/25 to 30/11/25	6,332.000000	5,065.600000	01/09/25	20.00	01/09/25	17/07/25	29/10/24	Contribution Entitlements	42,969.10	34,375.30
13 Insurance Total: 54,999.56 Less Discount: 54,999.56 Budget (Current): -70,556.83 (Net -64,142.57) Budget (Next): 0.00 (Net 0.00) Instalments: 4 / 4											
67	01/06/24 to 31/08/24	2,836.700000	2,836.700000	01/06/24	0.00		22/04/24	04/09/23	Interest Entitlements	19,249.98	19,249.98
68	01/09/24 to 30/11/24	2,836.700000	2,836.700000	01/09/24	0.00		22/07/24	04/09/23	Interest Entitlements	19,249.98	19,249.98
77	01/12/24 to 28/02/25	1,215.700000	1,215.700000	10/12/24	0.00		29/10/24	29/10/24	Interest Entitlements	8,249.80	8,249.80
78	01/03/25 to 31/05/25	1,215.700000	1,215.700000	01/03/25	0.00		20/01/25	29/10/24	Interest Entitlements	8,249.80	8,249.80
79	01/06/25 to 31/08/25	2,026.200000	2,026.200000	01/06/25	0.00		17/04/25	29/10/24	Interest Entitlements	13,749.95	13,749.95
80	01/09/25 to 30/11/25	2,026.200000	2,026.200000	01/09/25	0.00		17/07/25	29/10/24	Interest Entitlements	13,749.95	13,749.95

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.

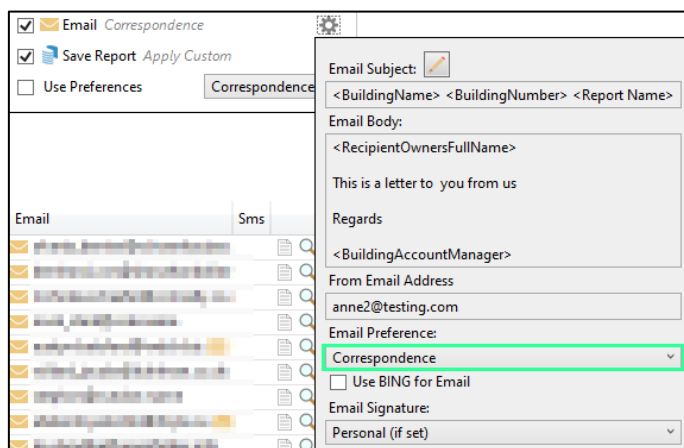
2.1 Merge Letters

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

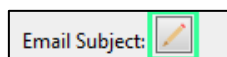
1. Navigate to Merge Letters (or Report Distribution) and click the configuration cog for Email.



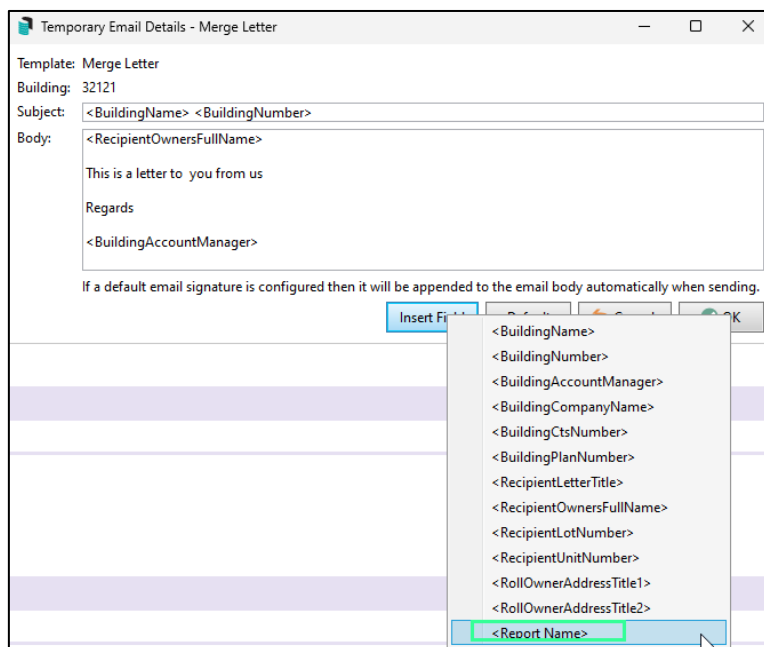
2. Ensure Correspondence is set as the Email Preference.



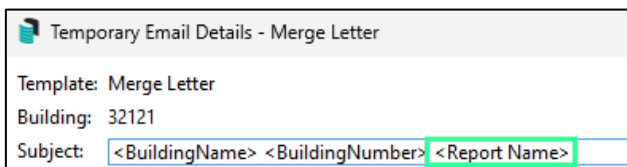
3. Click the edit icon beside “Email Subject”



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.



Temporary Email Details - Merge Letter

Template: Merge Letter

Building: 32121

Subject: <BuildingName> <BuildingNumber> <Report Name>

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.



Email Template Management

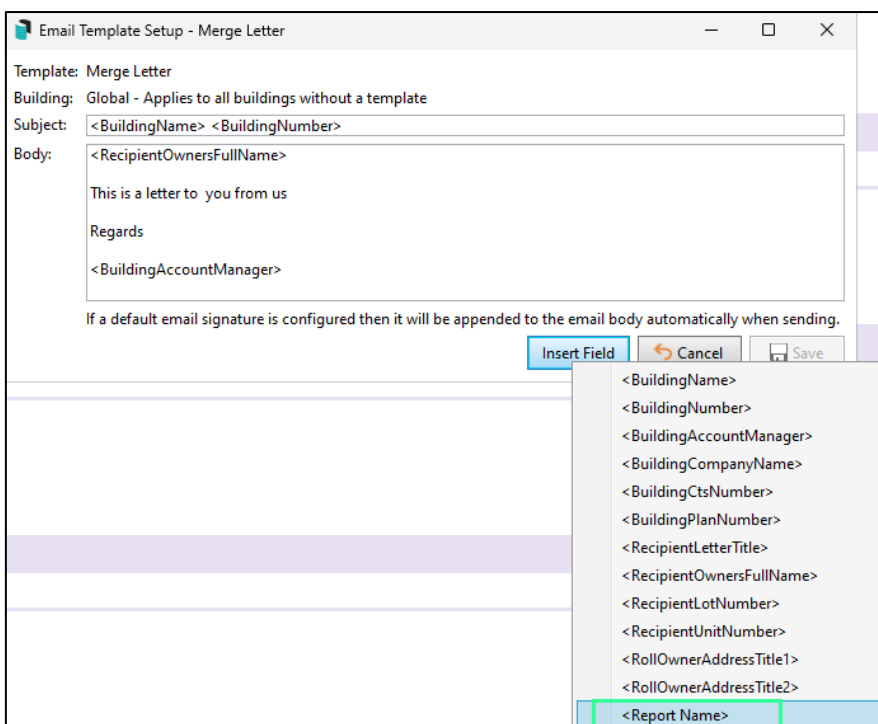
Template Type: Merge Letter

Search Building Name / Number

Global Template

<BuildingName> <BuildingNumber>

4. Click into the area the field should be added (E.g. Subject or Body)
5. Click Insert Field
6. Select 'Report Name' Field



Email Template Setup - Merge Letter

Template: Merge Letter

Building: Global - Applies to all buildings without a template

Subject: <BuildingName> <BuildingNumber>

Body: <RecipientOwnersFullName>

This is a letter to you from us

Regards

<BuildingAccountManager>

If a default email signature is configured then it will be appended to the email body automatically when sending.

Insert Field Cancel Save

<BuildingName>

<BuildingNumber>

<BuildingAccountManager>

<BuildingCompanyName>

<BuildingCtsNumber>

<BuildingPlanNumber>

<RecipientLetterTitle>

<RecipientOwnersFullName>

<RecipientLotNumber>

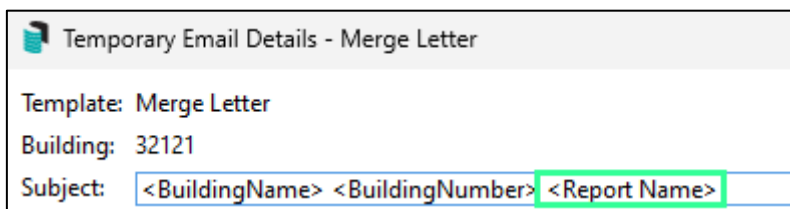
<RecipientUnitNumber>

<RollOwnerAddressTitle1>

<RollOwnerAddressTitle2>

<Report Name>

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



Temporary Email Details - Merge Letter

Template: Merge Letter

Building: 32121

Subject: <BuildingName> <BuildingNumber> <Report Name>

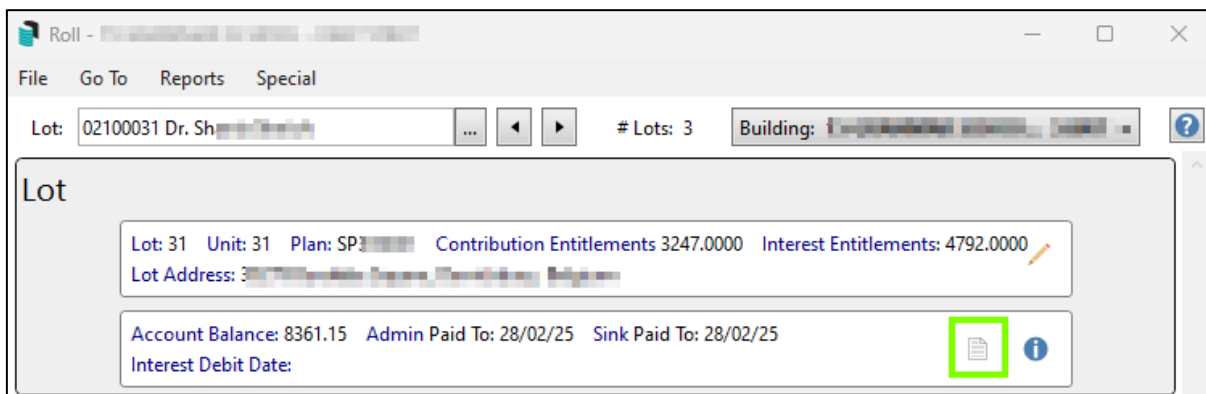
The report name can be derived in several ways.

- 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.



Roll - [Application Name]

File Go To Reports Special

Lot: 02100031 Dr. Sh... # Lots: 3 Building: 1...

Lot

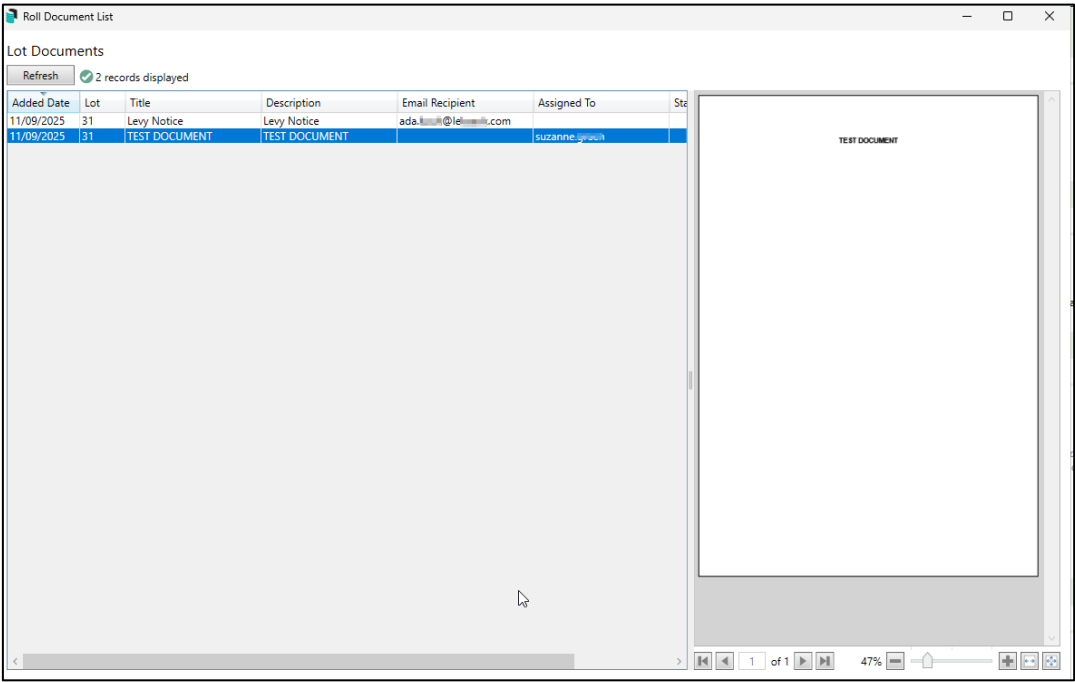
Lot: 31 Unit: 31 Plan: SP3 Contribution Entitlements 3247.0000 Interest Entitlements: 4792.0000

Lot Address: 3...

Account Balance: 8361.15 Admin Paid To: 28/02/25 Sink Paid To: 28/02/25

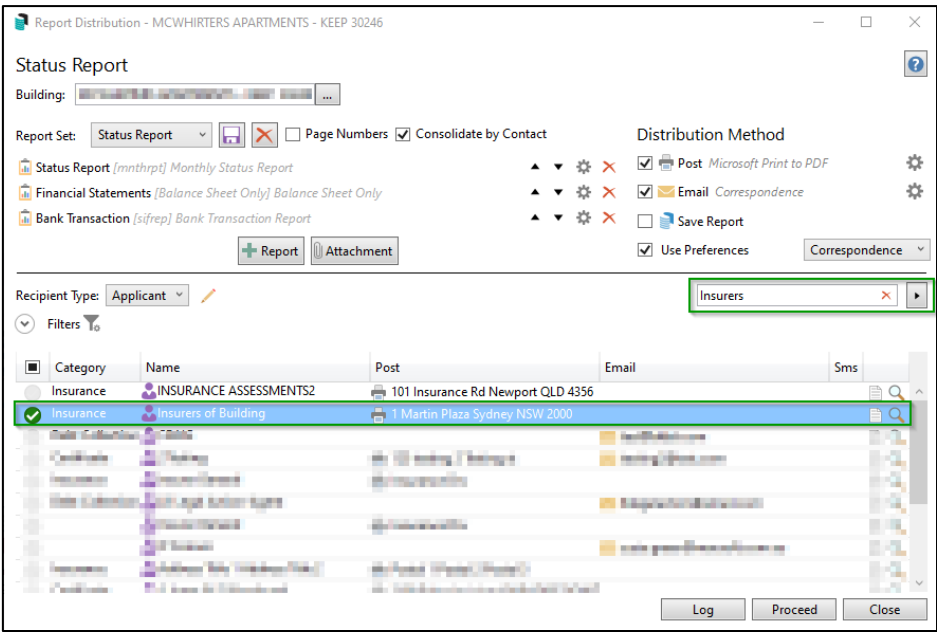
Interest Debit Date:

[Document Icon] [Info Icon]



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.

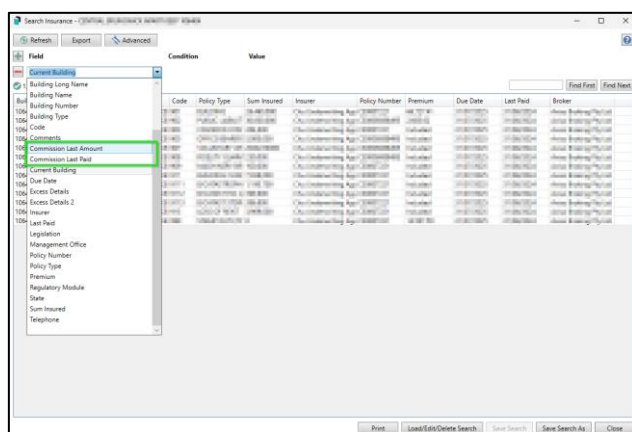


Please Note – the search function when entering Alpha characters will only return records for, Lot numbers, Unit Numbers, Email Addresses and Addresses. The Account field is excluded from the search.

5. Search Insurance – Commission fields added

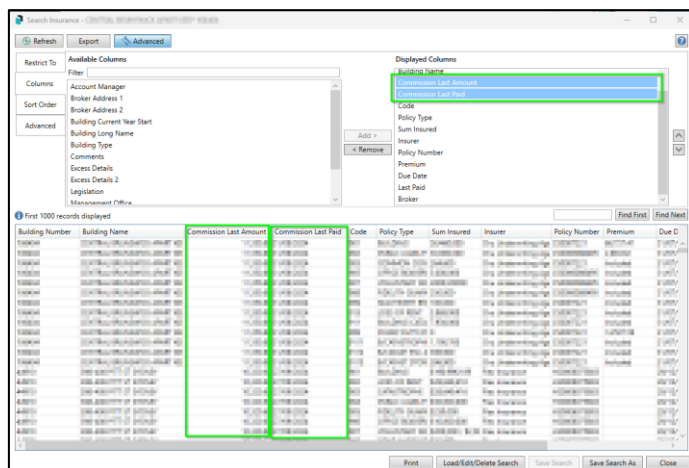
Two fields have been added to the Search Insurance Function:

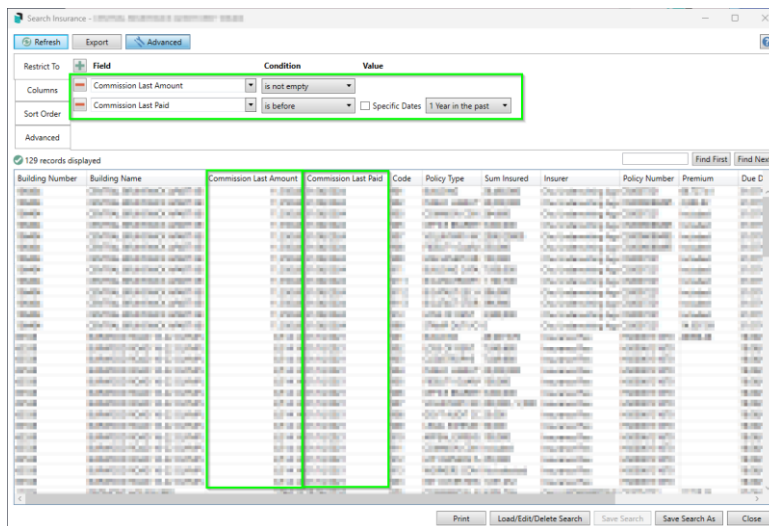
- Commission Last Amount
- Commission Last paid.



These fields can be displayed, sorted, and used for filtering results.

Please Note – the new search fields will not 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.





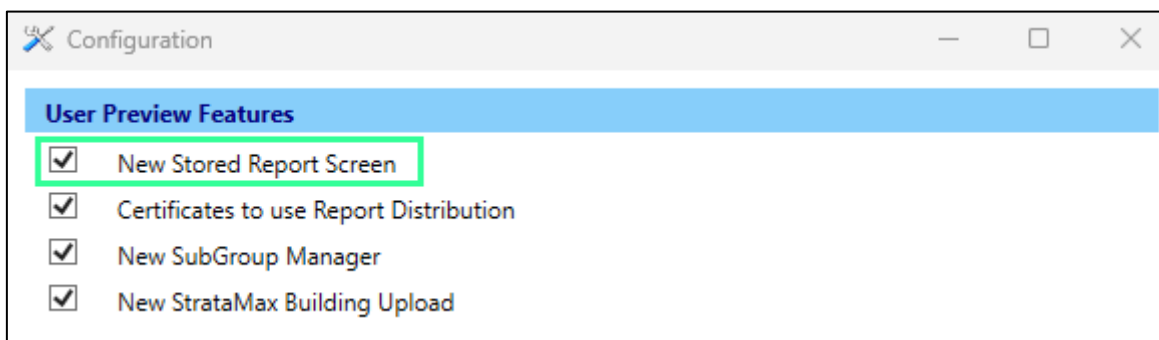
6. Preview Features – New Stored Reports

A new Preview Feature is introduced with this 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.

Stored Reports - The module of StrataMax

Search [Search] [P] [A] [B]

Date & Time	Report	Account	Recipient	Lot	Unit
14/08/2025 8:14:11 AM	Levy Arrears Notice	02100096	First Home Owners Unit	109	10
14/08/2025 8:14:11 AM	Levy Arrears Notice	02100097	Strata Leasing Pty Ltd	110	11
14/08/2025 8:14:11 AM	Levy Arrears Notice	02100101	Strata Leasing	204	20
14/08/2025 8:14:11 AM	Levy Arrears Notice	02100102	Strata Leasing	205	20
14/08/2025 8:14:11 AM	Levy Arrears Notice	02100104	Strata Leasing	207	20
14/08/2025 8:14:11 AM	Levy Arrears Notice	02100106	Strata Leasing	209	20
14/08/2025 8:14:12 AM	Levy Arrears Notice	02100108	Strata Leasing	211	21
14/08/2025 8:14:12 AM	Levy Arrears Notice	02100113	Strata Leasing	216	21
14/08/2025 8:14:12 AM	Levy Arrears Notice	02100114	Strata Leasing	217	21
14/08/2025 8:14:12 AM	Levy Arrears Notice	02100115	Strata Leasing	218	21
14/08/2025 8:14:12 AM	Levy Arrears Notice	02100118	Strata Leasing	301	30
14/08/2025 8:14:12 AM	Levy Arrears Notice	02100122	Strata Leasing	305	30
14/08/2025 8:14:13 AM	Levy Arrears Notice	02100124	Strata Leasing	307	30
14/08/2025 8:14:13 AM	Levy Arrears Notice	02100126	Strata Leasing	309	30
14/08/2025 8:14:13 AM	Levy Arrears Notice	02100127	Strata Leasing	310	31
14/08/2025 8:14:13 AM	Levy Arrears Notice	02100128	Strata Leasing	311	31
14/08/2025 8:14:13 AM	Levy Arrears Notice	02100131	Strata Leasing	314	31
14/08/2025 8:14:13 AM	Levy Arrears Notice	02100132	Strata Leasing	315	31
14/08/2025 8:14:13 AM	Levy Arrears Notice	02100134	Strata Leasing	317	31
14/08/2025 8:14:14 AM	Levy Arrears Notice	02100136	Strata Leasing	319	31
14/08/2025 8:14:14 AM	Levy Arrears Notice	02100137	Strata Leasing	320	32
14/08/2025 8:14:14 AM	Levy Arrears Notice	02100140	Strata Leasing	403	40
14/08/2025 8:14:14 AM	Levy Arrears Notice	02100142	Strata Leasing	405	40
14/08/2025 8:14:14 AM	Levy Arrears Notice	02100144	Strata Leasing	407	40
14/08/2025 8:14:14 AM	Levy Arrears Notice	02100146	Strata Leasing	409	40
14/08/2025 8:14:14 AM	Levy Arrears Notice	02100147	Strata Leasing	410	41
14/08/2025 8:14:15 AM	Levy Arrears Notice	02100153	Strata Leasing	417	41
20/08/2025 10:56:21 AM	Levy Notice	02100002	Strata Leasing	B	B
20/08/2025 12:27:49 PM	Levy Notice	02100001	Strata Leasing	A	A
20/08/2025 12:28:23 PM	Levy Notice	02100002	Strata Leasing	B	B
16/09/2025 1:12:41 PM	Certificate	02100001	Strata Leasing	A	A
16/09/2025 1:42:43 PM	Monthly Status		Strata Leasing		
17/09/2025 1:48:54 PM	Levy Notice	02100005	Strata Leasing	141	14
17/09/2025 1:57:43 PM	Levy Notice	02100002	Strata Leasing	B	B
17/09/2025 1:59:48 PM	Levy Notice	02100001	Strata Leasing	A	A
17/09/2025 1:59:48 PM	Levy Notice	02100002	Strata Leasing	B	B

Body Corporate Manager Pty Ltd
439 Thomas Park Leuchstedt JamaicaTAX INVOICE
ABN 54 452 292 986

NOTICE OF MAINTENANCE CONTRIBUTIONS

Date of Notice: 31 May 2025
Lot Number: B
Entitlements: 153
Unit Number: B

Plan of Subdivision No. 629715A
439 Thomas Park Leuchstedt Jamaica

Account	Period	Determined	Due Date	Amount	Discount	If paid by	Net Amount
Maintenance Fund Special	01/05/25	30/05/24	01/05/25	98.76	0.00		98.76
Administrative Fund	01/05/25 to 31/07/25	01/11/24	01/05/25	687.50	0.00		687.50
Administrative Fund	01/08/25 to 31/10/25	18/12/24	18/08/25	687.50	0.00		687.50
Loan Repayment	27/05/25	17/04/25	27/05/25	535.62	0.00		535.62
This is other wording				105.00			105.00
Totals (Levies include GST)				1,378.10	0.00		\$1,378.10

GST component on levies of \$1,378.10 is \$133.98

AMOUNT PAYABLE: \$1,378.10

Please deposit your payment directly into our trust account using the detachable deposit slip below.
Please make your cheque payable to: Plan of Subdivision No. 629715A

Payment Instructions wording Payment Instructions wording Payment Instr

Amount Paid: \$
Date Paid: / /

STRATAPAY
9734 9671 1
Amount: \$1,378.10
Due Date: 01 May 25

Strata Managers
629715A/2025/0002
Unit B/B
First Home Owners Unit
64537 Troy Summit

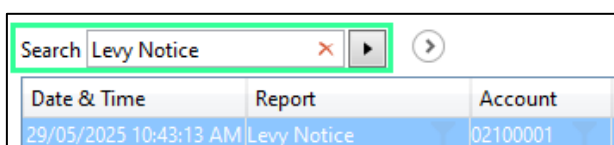
Some reports will have a grey background – these are reports that are currently stored in the old Stored Reports module.

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.

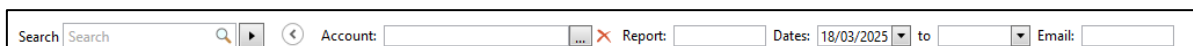


6.2.2 Filter Options

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.




This will expand filter options.




- 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.

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

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

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

6.3 Right Click Options Menus

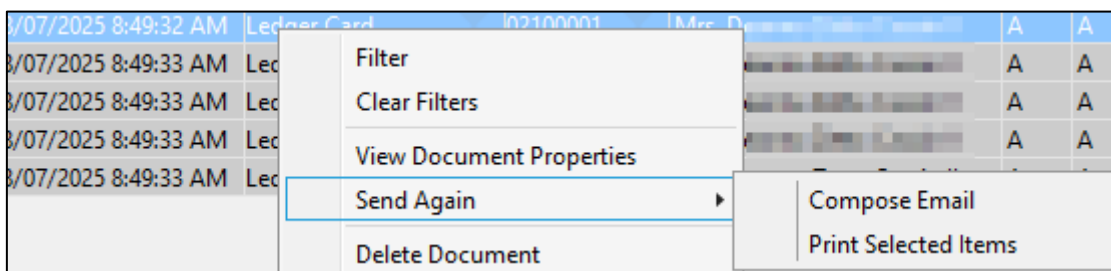
6.3.1 Old Style Stored Reports

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

18/07/2025 8:49:11 AM	Ledger Report	02100001
18/	Filter	02100001
18/	Clear Filters	02100001
18/	View Document Properties	02100001
18/	Send Again	02100001
18/	Delete Document	02100001

Options available are:

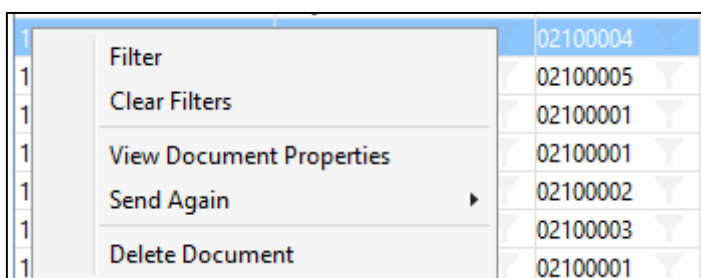
- Filter – This will filter results for the selected report type and account.
- Clear Filters – This will clear the filter and display all results.
- View Document Properties – This will open the document in DocMax where properties can be viewed or modified.
- Send Again – This will popout option to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

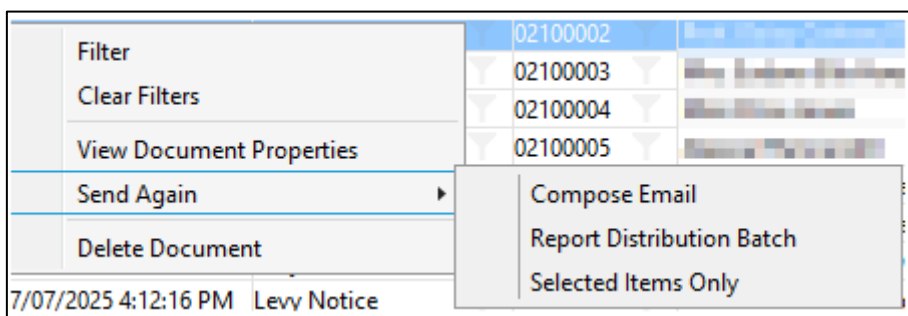
6.3.2 New Style Stored Reports

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 popup 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.

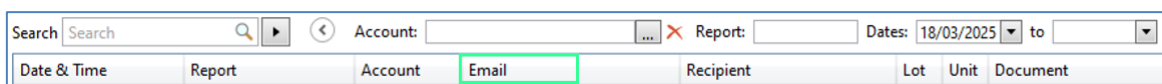
6.4 Re-arrange Display Columns

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.



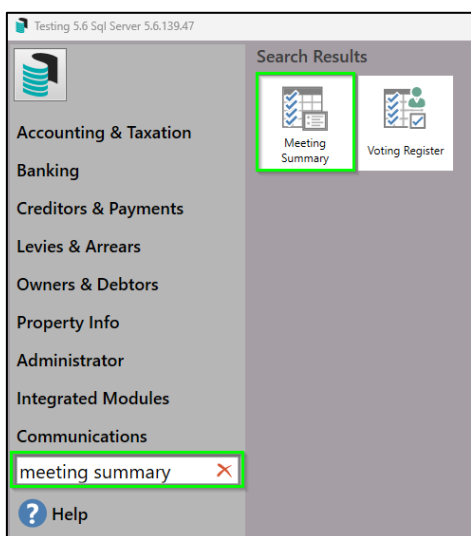
Drag to required position



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.

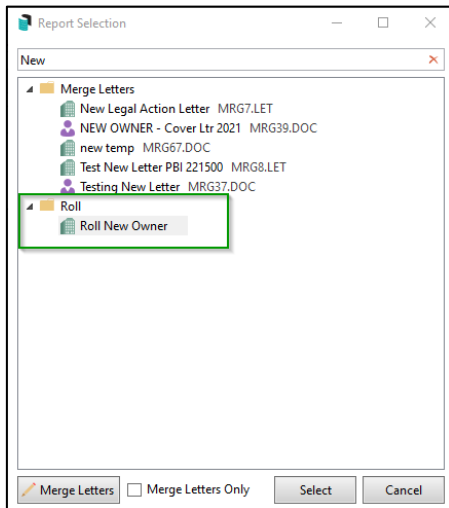
A new menu item has been added that opens the existing meeting window, replicating the behaviour of the Meetings buttons found in Building Information window.



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.