

# Release Notes – Version 5.6.143

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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



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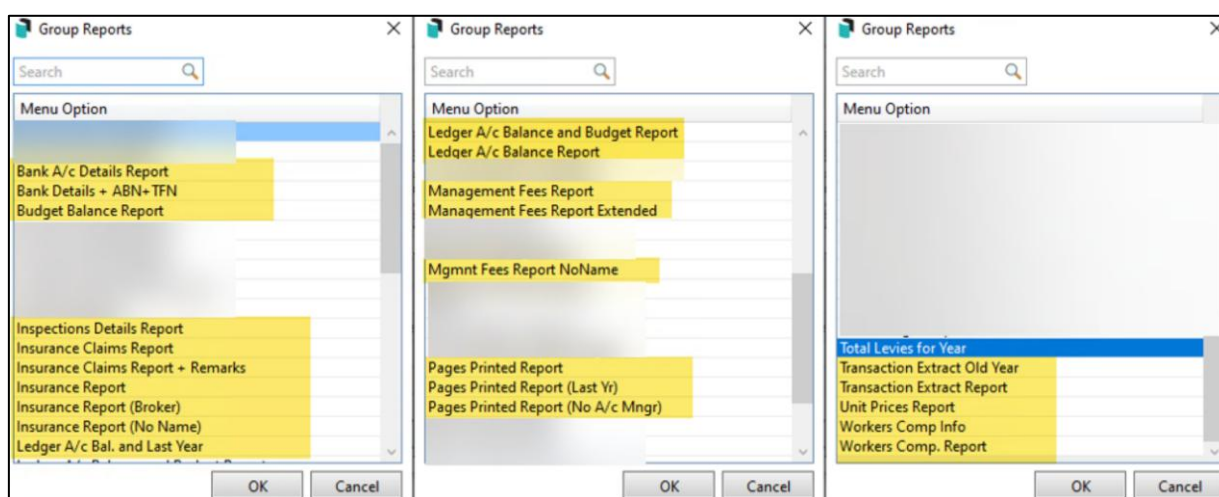
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# What's New

## 1. Reports/Utilities (Global)

Many reports in Global Reports have been replaced with searches or other reports. As part of the upgrade the following highlighted reports have been removed from Reports/Utilities (Global).



## 2. Certificate Section 56

A new Certificate Section 56 has been created which applies only to ACT Buildings that have the Type of 'Community Title Scheme' and Regulatory Module of 'Community'. The new Certificate will allow clients to complete the Certificate via StrataMax and alleviate having to complete the form manually.

Following changes that have made to the Certificate.

ACT – Section 56 template has been updated to merge information from data within StrataMax where possible.

- Building Information
  - Address
  - Overdue Interest Rate
  - Interest By Law AGM Date
  - Unit Class
  - Block
  - Section
  - Office Bearers

- Roll
- Body Corporate Manager
- Common Property Register (Category must be Lot Owner-Exclusive Use)
- Insurance
- Levy Management

Info Editor has been enhanced to allow information to be entered that is Global (used for all Section 56 certificates for Community Title Schemes) or building specific for areas where there is currently nowhere in StrataMax to merge this from. Information entered into Info Editor is saved and used for subsequent certificates.

Field	Text (this building only)	Text (global default for this certificate)
Sealing Clause		
1.6 - Easement over common property		
5.1 - Merger and division of bodies corporate - unanimous resolution (Date of: dd/mm/yyyy)		
5.1 Additional Details		
5.2 Interest rate fixed for overdue contributions - Details		
5.4 Revocation of exclude by-law - Details		
5.5 - Agreement of amalgamation - unanimous resolution (Date of: dd/mm/yyyy)		
5.5 - Agreement of amalgamation - Details		
5.6 - Consent of subsidiary schemes to amalgamation of scheme - ordinary resolution (Date of: dd/mm/yyyy)		
5.6 - Consent of subsidiary schemes to amalgamation - Details		
6.1 - Is the body corporate exempt (by unanimous resolution) from taking out building insurance (Date of: dd/mm/yyyy)		
7.2 - Is there anything that would restrict or extend the use of the common property - Details?		
7.3 - Are there any encumbrances, easements, leases, licences or other rights related to the common property that are not discoverable - Details?		
7.4 - Are there any claims that would restrict right of passage to/from the lot or common property - Details?		
7.5 - Is any resumption of the common property intended in the future, or being progressively carried out - Details?		
7.6 - Has any work been carried out on common property that remains unpaid - Details?		
7.7 - Certificate Attached - Certificate of fitness of occupancy and use?		
7.7 - Certificate Attached - Certificate of compliance?		
7.8 - Has Body Corp. agreed to transfer or charge the common property or certificate of title - Details?		

### Additional notes:

1. StrataMax is unable to merge document names onto section 9 for documents attached via Document Inclusion or manually attached therefore section 9 will include a note 'refer to contents page'; it is recommended to include a Contents Page by selecting this from the available reports as the contents page will automatically list each document and its page number.

Report Set: ▼ 📄 ✕ ☒ Page Numbers ☐ Consolidate by Contact

- Certificate Cover Letter [certcov] Certificate Cover Letter ▲ ▼ ⚙️ ✕
- Contents Page [repset] Report Set ▲ ▼ ⚙️ ✕
- Certificate Certificate - ACT Community Title Act 2001 - Form 6 ▲ ▼ ⚙️ ✕
- AGM Minutes 2025 ▲ ▼ ✕

➕ Report 📎 Attachment

2. Borders around sections has intentionally been omitted as the borders are not able to automatically expand when required.

To view Certificate:

1. Navigate to Certificates
2. Select Lot Account
3. Select Applicant
4. Click Proceed

**Certificate**

Accounts:  ...

Report Set:  [Print] [X] ☒ Page Numbers ☐ Consolidate by Contact

▲ ▼ ⚙️ ✖️  
 
 ▲ ▼ ⚙️

**Distribution Method**

☐ Print Post  
☒ Email Correspondence ⚙️  
☐ Save Report Certificate Profile  
☐ Use Preferences

Correspondence ▼

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Recipient Type:  ✎

Search

Filters 🏠

Category	Name	Post	Email	Sms
<input checked="" type="radio"/> Certificate	[Redacted]		[Redacted]	
<input type="radio"/> Certificate	[Redacted]		[Redacted]	

Example Below of the partial certificate:

[illegible]

### 3. Report Distribution – Excel

Column formatting has been activated for Reports generated to excel. This will allow reports where data is set to four decimal places to appear as four decimal places.

Example of Report and formatting in Excel.

Page			Roll List		19 November 2025	
Plan of Subdivision No. 74334254						
A/c No	Lot No	Unit No	Name	Address (3)	Contrib Entit.	Interest Entit.
02100001	1G	1G	John James Smith	Swaziland	91.0000	86.0000
			John James Smith	Swaziland		
02100002	1R	1R	John James Smith	Norfolk Island	88.0000	97.0000
02100003	2G	2G	John James Smith	Guam	109.0000	105.0000
02100004	2R	2R	John James Smith	Qatar	83.0000	92.0000
02100005	3G	3G	John James Smith	Guam	107.0000	103.0000
02100006	101	101	John James Smith	Saint Helena	77.0000	77.0000
02100007	102	102	John James Smith	Malaysia	64.0000	66.0000
02100008	103	103	John James Smith	Bosnia and Herzegovina	94.0000	91.0000
02100009	105	105	John James Smith	Western Sahara	85.0000	83.0000

Account Code	Lot Number	Unit Number	Name	Address Line Last	Contrib Entitlement	Interest Entitlement
02100001	1G	1G	John James Smith	Swaziland	91.0000	86.0000
			John James Smith	Swaziland		
02100002	1R	1R	John James Smith	Norfolk Island	88.0000	97.0000
02100003	2G	2G	John James Smith	Guam	109.0000	105.0000
02100004	2R	2R	John James Smith	Qatar	83.0000	92.0000
02100005	3G	3G	John James Smith	Guam	107.0000	103.0000
02100006	101	101	John James Smith	Saint Helena	77.0000	77.0000
02100007	102	102	John James Smith	Malaysia	64.0000	66.0000
02100008	103	103	John James Smith	Bosnia and Herzegovina	94.0000	91.0000
02100009	105	105	John James Smith	Western Sahara	85.0000	83.0000

### 4. Report Distribution – Ledger Card

Enhancements have been made to the configuration settings for Ledger Card produced via Report Distribution. The following two settings have been added:

- Style – All history has been added to the selection dropdown for historical reporting for the years available.
- Interest setting– Date for interest calculation (blank for Today)

The Configuration window is divided into two main sections: Settings and Template. The Settings section includes a 'Style' dropdown menu set to 'All history', a checkbox for 'Do not calculate interest', a 'Date for interest calculation (blank for Today)' dropdown, a 'Message' text area containing 'This is the message', and a 'Building Override Message' text area. The Template section includes a checkbox for 'Use Override Letterhead', an 'Override Letterhead' dropdown set to 'Blank', and a 'Template' dropdown set to 'ledgercard1 Statement/Ledger Card - Deposit Slip (Le)'. A 'Close' button is located at the bottom right.

## 5. Account Maintenance – Account Group and Copy to Buildings

Account Maintenance/Account Group drop down selector now validates eligible account groups within the module and supports copying system flag changes across buildings.

The Account Maintenance window displays the following fields: 'Code' (145101), 'Description' (LIFT - MAINTENANCE OC1), 'Type' (Posting), 'Account Type' (Expense), 'Trading Fund' (Admin Fund), 'System Flag' (None), 'Tax Code' (GST on Expenses), 'Default Tax Code' (GST on Expenses), 'Non Mutual Income' (checkbox), 'Non Claimable Income' (checkbox), 'Income Tax Expense Category' (dropdown), 'Comments' (text area), 'Report Group' (text area), 'Restrict Access' (checkbox), 'Account Group' (OC1 - Whole Building), and 'Category' (dropdown). A green box highlights the 'Account Group' dropdown. At the bottom, there is a checkbox for 'Apply Changes To Master Chart & Buildings', a 'Save' button, and a 'Cancel' button.

The following rules apply when selecting or modifying account groups:

- **No Transactions / Zero Balance** – All account groups (or the option to clear) can be selected if there are no transactions and all account groups have a zero balance.
- **Single Account Group with Balance** – If only one account group has a balance, that group or the option to clear can be selected.
- **Multiple Account Groups with Balances** – If multiple account groups have balances only the option to clear can be selected
- **Changing Account Group** – If the selected account group differs from the one with a balance, the user must update the account group before saving.
- **Copying Changes Across Buildings**– If an account group change is attempted on a building that meets these rules and is copied to another building with existing transactions, the change will not apply to the other building.



# What's Better

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- Levy Management – Add by budget will now add order by period start descending.
- DocMax Prefill – Historical roll contacts will no longer be considered during matching.
- EFT Manager – Finalise EFT where Financial Year Start and Financial Year End has been changed will no longer generate an error
- Certificates – Certificates where a reference was applicable, reference was not being displayed. Issue has been resolved.
- Levy Management – End of the month restriction for Levy Year Roll Over has been removed
- Payment Entry – Will now open a blank Payment Entry form if account code no longer exists
- Levy Report – Levy Notice will now include Address Line 2 when produced from Report Distribution
- Process Bank Statements – Other Investment Accounts – Save will now be disabled where there are validation errors
- Budget Summary Setup – Invalid data is added when adding a new Budget Summary item for an Account. This has now been resolved.
- Diary – has been removed as well as all security options
- Preview Features – "New Stored Report Screen", "New Subgroup Manager" and "New StrataMax Building Upload" has been removed from the preview feature settings.
- Task Management – A comprehensive list of Inspection types has been added to Task Management to allow the creation of Tasks for Inspections
- Report Distribution – Account Dissection report now sorts by default in Code Number order. Can also be sorted by Unit Number, Lot Number and Name order. Note Legacy report only sorts by Code number.
- DocMax – If a profile is deleted or changed but has not been updated in Report Distribution, an error was reported. This has now been resolved
- Certificates – changes have been made to use Certificate Fields instead of hard coded invoice numbers to determine where certificate info is displayed, this will affect which levies should in the levy admin or sinking fund sections.