Release Notes – Version 5.6.144

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

StrataMax StrataCash TRATAPAY

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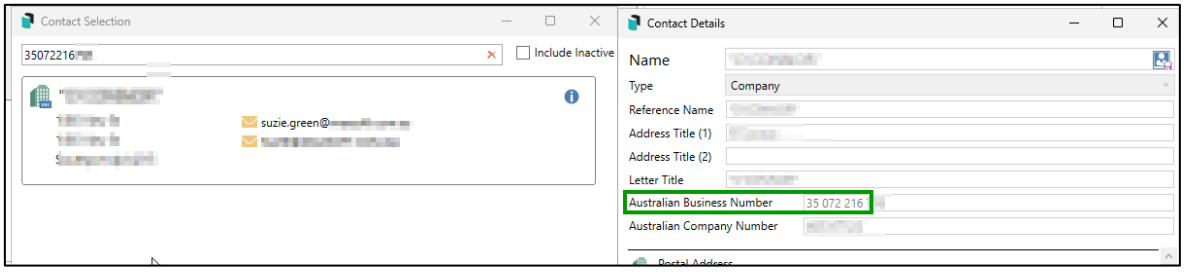
What's New

1. Select Contact – search for ABN and ACN

The Select Contact, Contact selection and Create/Select Contact screens have been updated to allow searches for ABN and ACN's.

To search for ABN or ACN:

1. Locate Select Contact
2. Enter ABN or ACN in search bar.



2. Report Distribution – Preview Screen Distribution Button

The Proceed button in the Report Publish Preview screen has been replaced with a new distribution summary button. This button provides enhanced visibility into distribution details before execution.

The summary button will display:

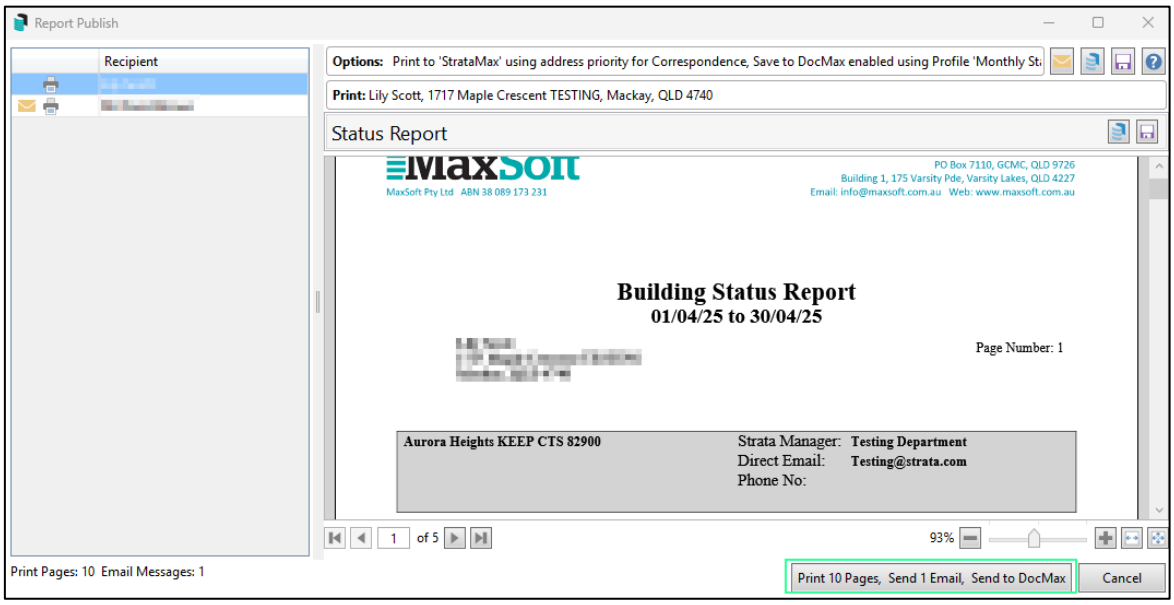
- Number of emails to be sent
- Number of pages to be printed
- Indicate if distribution will be sent to DocMax.

This will improve transparency and decision-making prior to finalising distribution.

Use the following steps to see this change:

1. Navigate to a Report Distribution screen (e.g. Merge Letters)
2. Select a letter or report.
3. Set required recipients.
4. Set required distribution methods and preferences.
5. Click Proceed

6. In the review screen, review the summary to confirm the distribution is correct.
7. Click the Summary button to complete the distribution

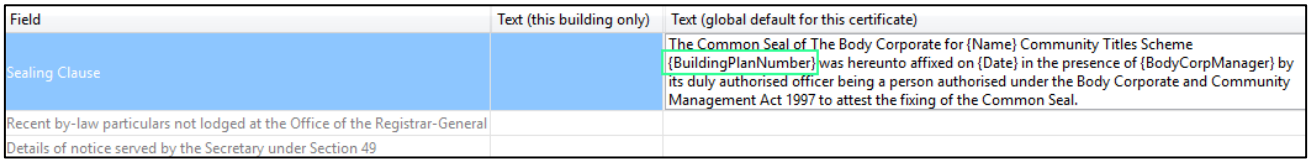


3. Certificates – New Sealing Clause Merge Field - BuildingPlanNumber

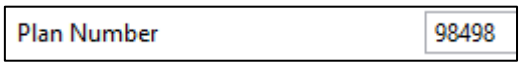
A new merge field has been activated for use with the Certificate Sealing Clause to allow either the Lot Plan Number or the Building Plan number to be output if they are different.

Use the steps below to modify the clause:

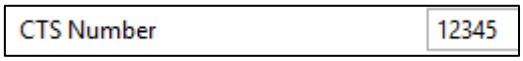
1. Navigate to Certificates
2. Click the Configuration cog beside the certificate Template.
3. Scroll to Certificate Settings - Click Info Editor
4. Click into the Sealing Clause field to update - this may be for the set building only or global. (The sealing clause text can be copied from the Sealing Clause tab in the legacy screen into the Info Editor field for the Sealing Clause if necessary).
5. Add the field {BuildingPlanNumber}
6. Close



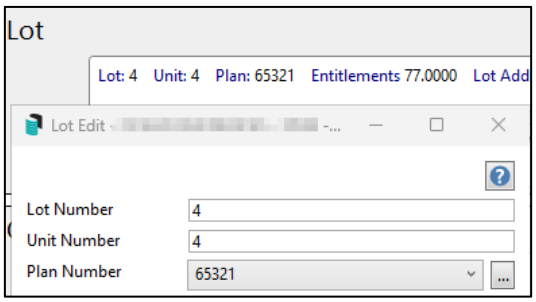
- To output the Building Plan Number from Building Information, use the {BuildingPlanNumber} field in the Sealing Clause. This is useful if the Building Plan Number is required but is different to the Lot Plan Number.



- To output the CTS number from Building Information, use the {CTSNumber} field.



- To output the Lot Plan Number from Roll – Lot Editor, use the {PlanNumber} field.



Note: Building Plan Number is only available in Sealing Clause.

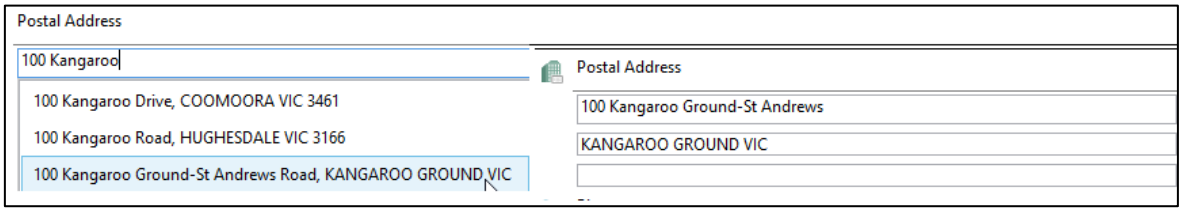
Lot Plan Number will always override Building Plan Number in the actual Certificate.

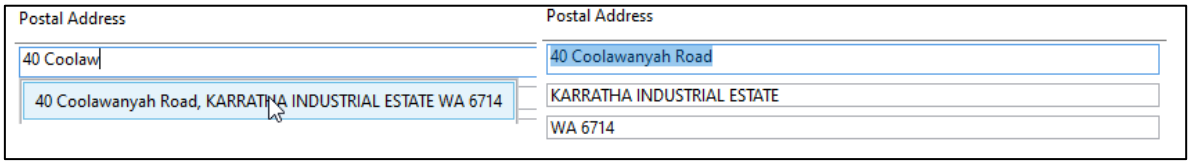
4. Address lookup updates.

The following updates have been made to Address lookup on the contact details screen.

- If the second line with the Suburb State and Postcode exceeds thirty characters, it will split between Suburb and State.
- Addresses prefixed with 'ATT' will be ignored.

1. Navigate to Roll
2. Select 'Lot' and click edit icon.
3. Contact details - Postal address.

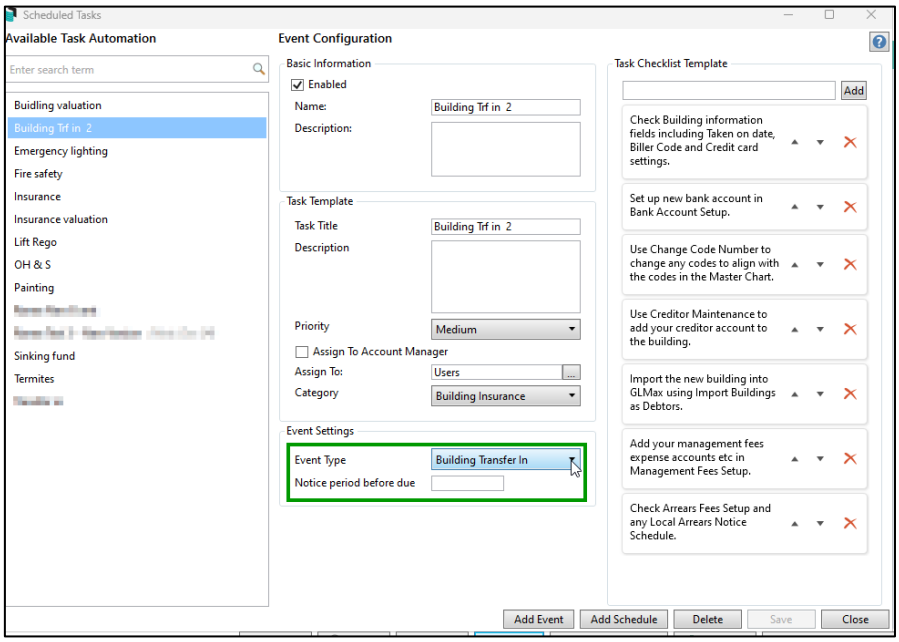




5. Task Management – Building Transfer In

A new Event Type has been created in Task Management titled 'Building Transfer In.' When Event type 'Building Transfer In' is selected, the Task Checklist template will be automatically populated with a list of preset tasks to be completed as part of transferring a building. When a building is transferred into StrataMax via the Building Transfer function; a task will automatically be created based on your event configuration.

1. Navigate to Task Management
2. Select Schedules
3. Click Add Event
4. Click Event Type selector.



6. Journal Preparation Enhancements

6.1 No GST Option for Non-GST buildings

Enhancements have been made to hide the 'No GST' option on the User Interface if the building is not registered for GST. The following will apply based on the building setup:

Tax codes can be selected where:

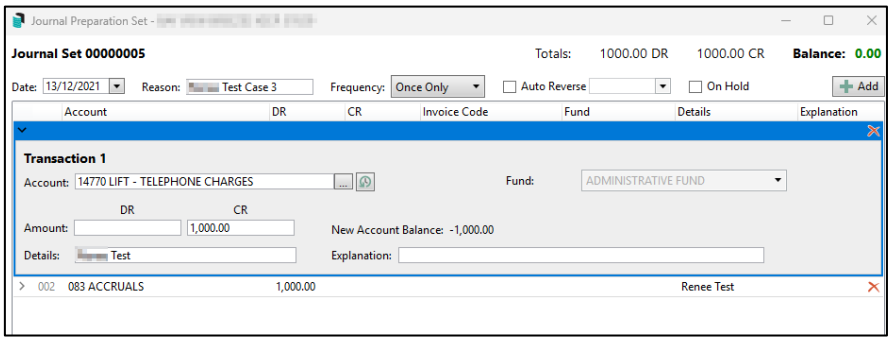
- A non-account group building that is Registered for BAS
- An account group building where an account group is selected that is registered for BAS.

No GST checkbox will be available where:

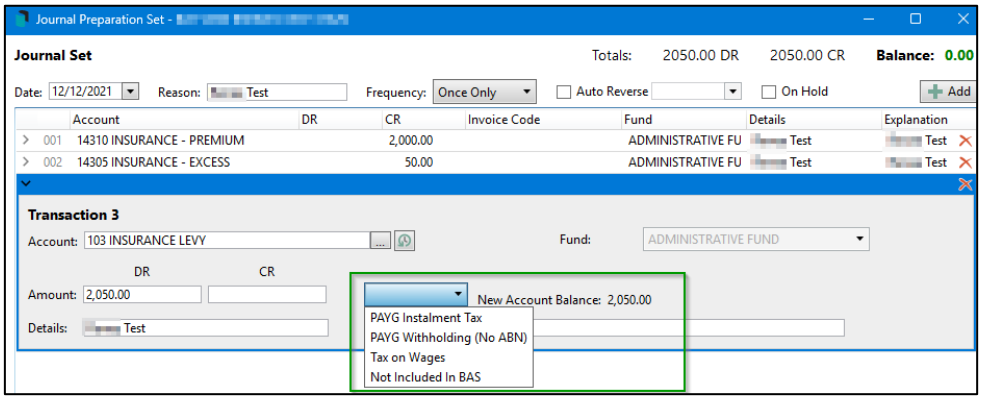
- A non-account group building that is registered for GST.
- An account group building where an account group that is registered for GST is selected.

If the No GST checkbox is available, GST tax codes will also be selectable. If No GST checkbox is not available, then only the non-GST tax codes will be selectable.

Example Non-GST Registered Building User Interface



Example Non-GST Registered Building by Registered for PAYG User interface.



6.2 Auto – Reverse Journal

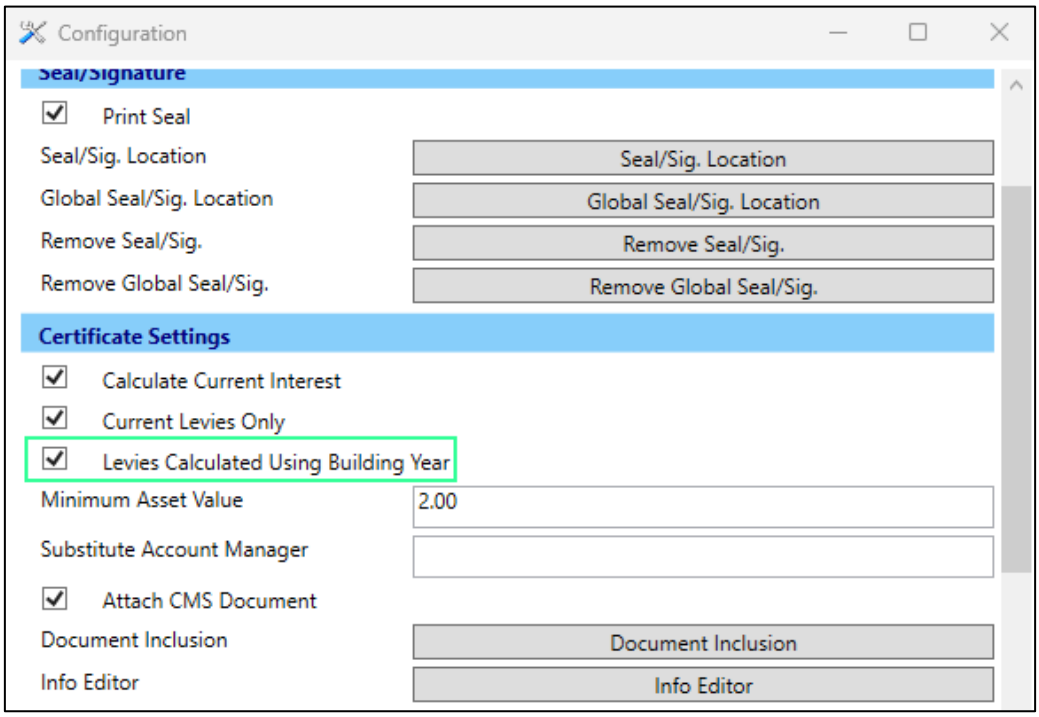
Changes have been made in Journal Preparation when processing journals. If a new journal is to be auto reversed on or before the current month. the system will now automatically post the Auto Reverse journal on processing the other journals and users will no longer have to close and reopen Journal Prep to process separately.

7. Certificates – New Configuration - Levies Calculated Using Building Year

A new configuration option is available to allow calculating levies by Building Year on Certificates. Setting this will calculate the levies based on the Building Financial Year and will show the amount on Certificates where the terminology 'Current Financial Year' is applicable.

Navigate to Certificates, click the configuration cog beside the Template, and scroll to Certificate Settings beside the Template to review the new configuration option.

Note: This setting applies to the selected building only and is optional.



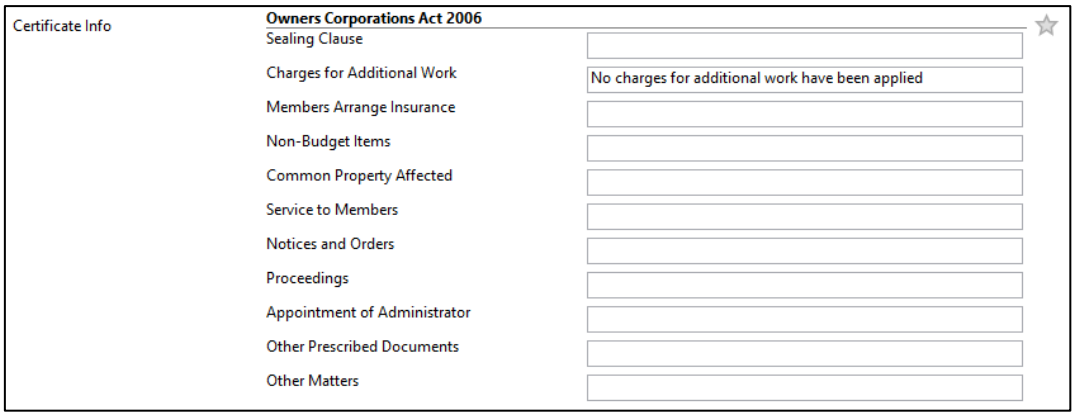
8. Certificates – Building Information Certificate Section

8.1 Requisition data for Vic Buildings

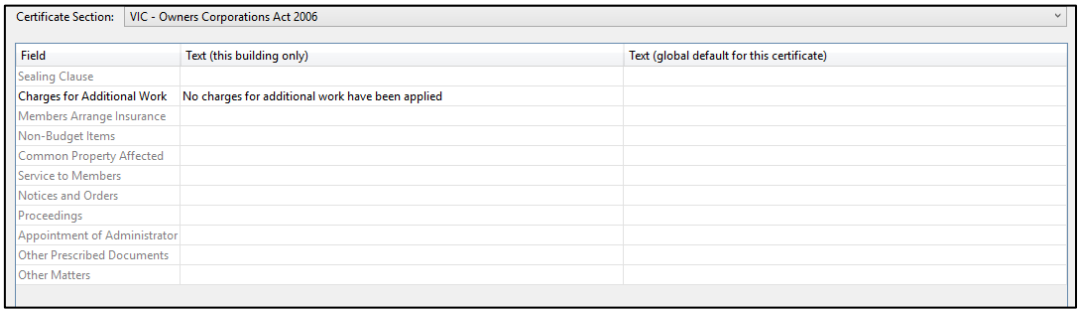
Requisition data for Victorian buildings has been migrated into the new Certificate module within Info Editor. Additionally, local requisitions can now be entered directly in Building Information – Certificate Ifo.

Users can add, edit, or review Certificate requisition data by navigating to:

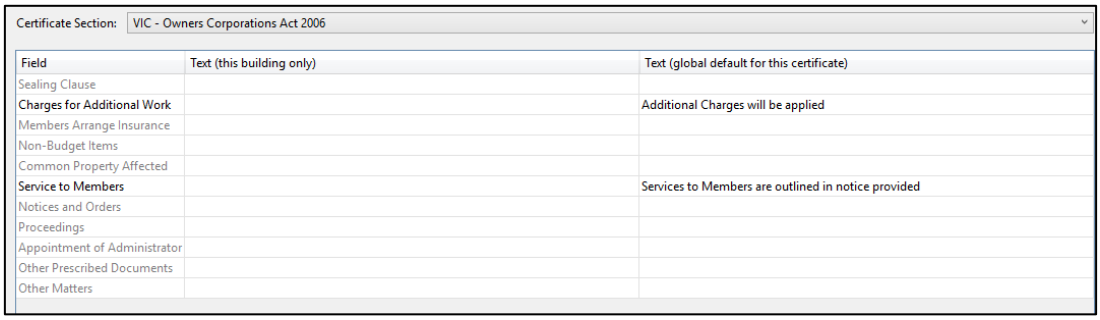
- Building Information - Certificates Info section. Enter text into the relevant field.



- Data entered for local buildings will replicate automatically in Certificates / Info Editor.

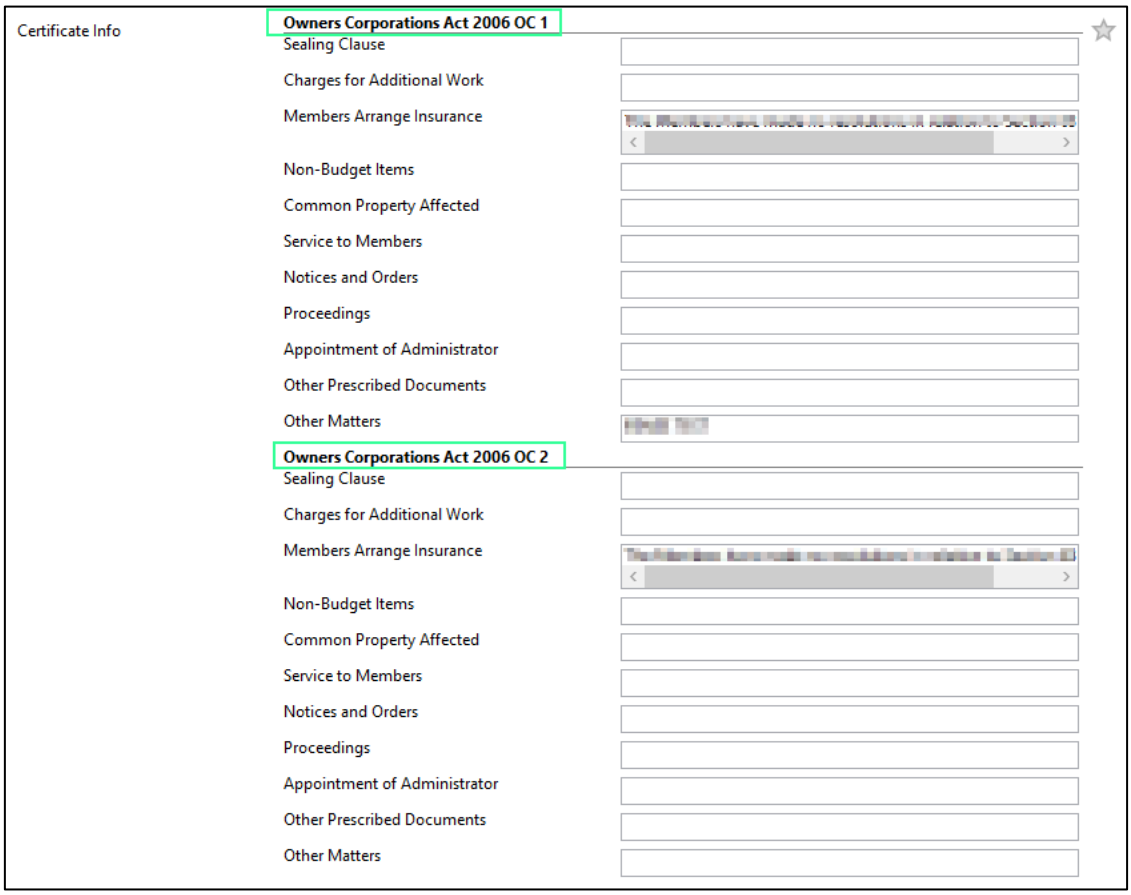


- Global requisition data can also be entered or modified within the Certificates module.



8.2 Multi OC's

If there are multiple Account Groups in the building, a section for each OC will be available to record data. Enter information for the required OC and this will be included on certificates produced for that Account Group.

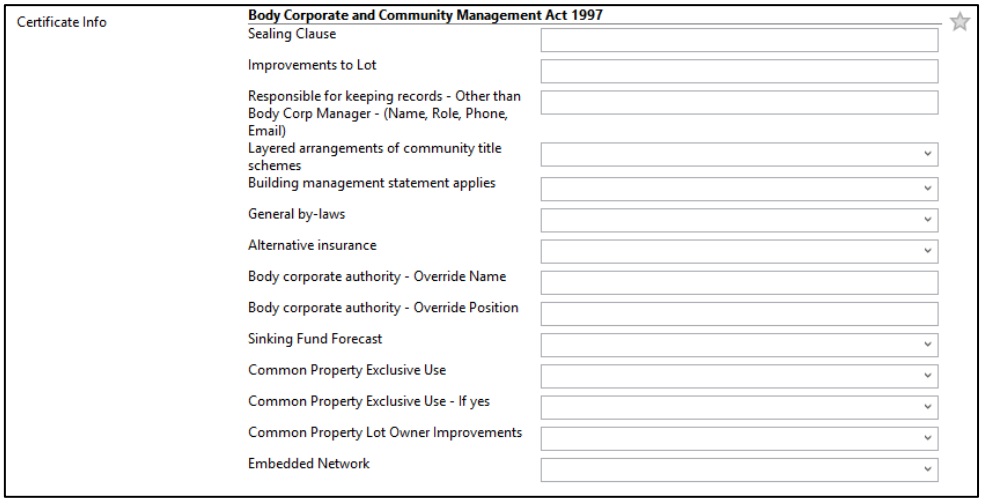


8.3 Building Information - Certificate Info - all other certificates

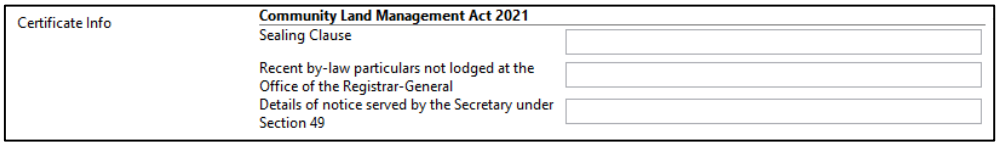
Certificate data for states other than Victoria can now be entered in Building Information. Navigate to Building Information and search or scroll to the Certificates Info section to add edit or review Certificate data.

Examples of Building Information – Certificate Info for other states.

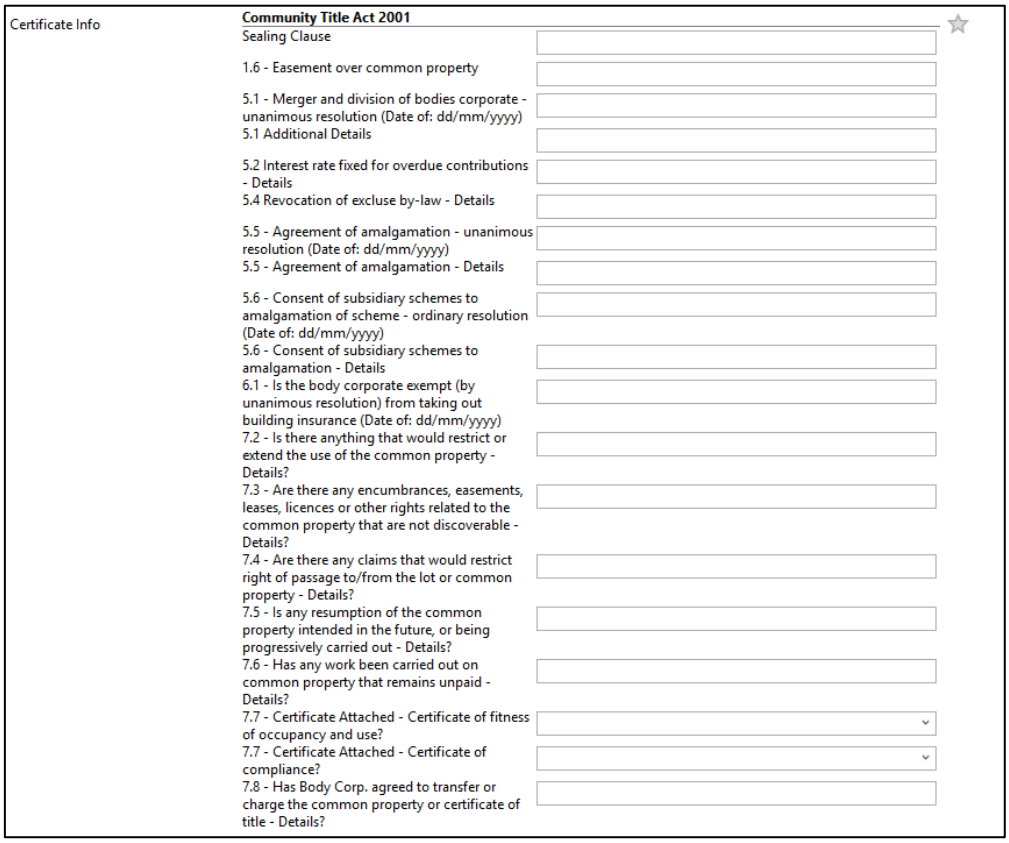
QLD



NSW



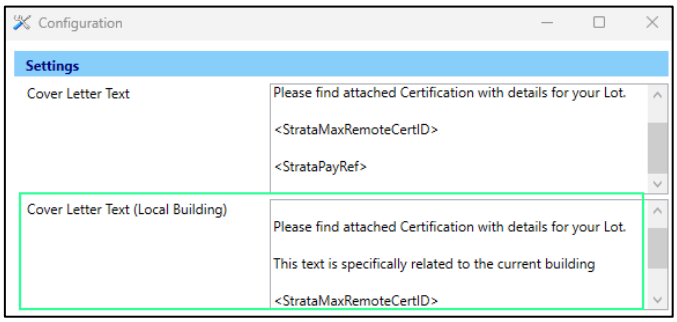
ACT



9. Certificates – Building Specific Cover Letter Text

Building specific text can now be included for Certificate Cover Letters. Navigate to Certificates, click the configuration cog beside the cover letter template to review, or add local text. The local text will override any global text on the cover letter for the selected building.

Certificate Configuration



Cover Letter.

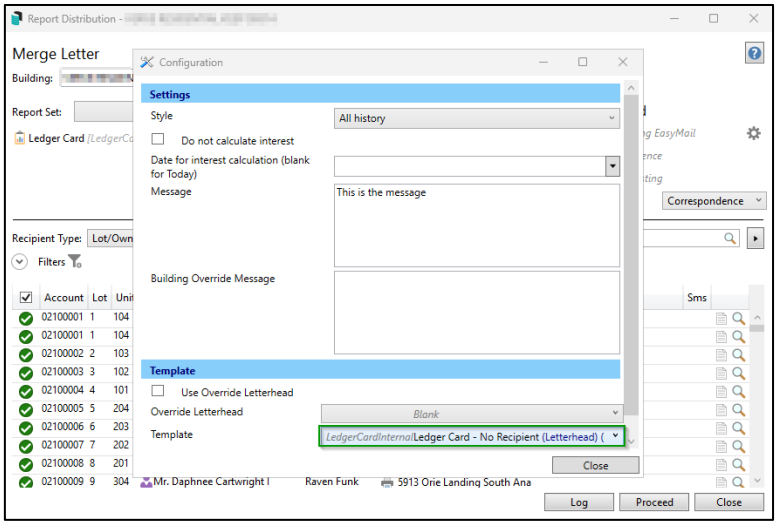
Thank you for your request.

Please find attached Certification with details for your Lot.

This text is specifically related to the current building

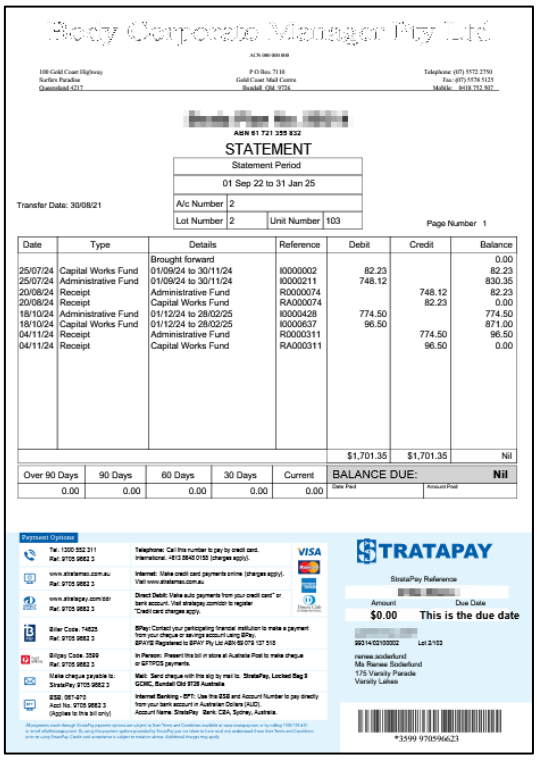
10. Report Distribution – Ledger Card Internal Use

A New Ledger Card template is now available' LedgerCardInternal' which can be selected for an internal template.



The following will be available on the Ledger Card Internal template:

- Name and Address will not display on the new template.
- Lot and Unit number will display.



Body Corporate Manager Pty Ltd

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Gold Coast Mail Centre
Bundall Qld 9726

Telephone: (07) 5572 2750
Fax: (07) 5578 5125
Mobile: 0418 752 507

[redacted]

ABN 61 721 355 832

STATEMENT

Statement Period			
01 Sep 22 to 31 Jan 25			
A/c Number	2		
Lot Number	2	Unit Number	103

Transfer Date: 30/08/21

Page Number 1

Date	Type	Details	Reference	Debit	Credit	Balance
		Brought forward				0.00
25/07/24	Capital Works Fund	01/09/24 to 30/11/24	I0000002	82.23		82.23
25/07/24	Administrative Fund	01/09/24 to 30/11/24	I0000211	748.12		830.35
20/08/24	Receipt	Administrative Fund	R0000074		748.12	82.23
20/08/24	Receipt	Capital Works Fund	RA000074		82.23	0.00
18/10/24	Administrative Fund	01/12/24 to 28/02/25	I0000428	774.50		774.50
18/10/24	Capital Works Fund	01/12/24 to 28/02/25	I0000637	96.50		871.00
04/11/24	Receipt	Administrative Fund	R0000311		774.50	96.50
04/11/24	Receipt	Capital Works Fund	RA000311		96.50	0.00
				$1,701.35	$1,701.35	Nil

Over 90 Days	90 Days	60 Days	30 Days	Current	BALANCE DUE:	Nil
0.00	0.00	0.00	0.00	0.00	Date Paid	Amount Paid

Payment Options

Tel: 1300 552 311
Ref: 9705 9662 3

Telephone: Call this number to pay by credit card.
International: 4613 8840 0155 (charges apply).

www.stratamax.com.au
Ref: 9705 9662 3

Internet: Make credit card payments online (charges apply).
Visit www.stratamax.com.au

www.stratapay.com/ddr
Ref: 9705 9662 3

Direct Debit: Make auto payments from your credit card* or bank account. Visit stratapay.com/ddr to register
*Credit card charges apply.

Biller Code: 74625
Ref: 9705 9662 3

BPay: Contact your participating financial institution to make a payment from your cheque or savings account using BPay.
BPAY® Registered to BPAY Pty Ltd ABN 69 079 137 518

Bilpay Code: 3599
Ref: 9705 9662 3

In Person: Present this bill in store at Australia Post to make cheque or EFTPOS payments.

Make cheque payable to:
StrataPay 9705 9662 3

Mail: Send cheque with this slip by mail to: StrataPay, Locked Bag 9 GCMC, Bundall Qld 9726 Australia

BSB: 067-970
Acct No: 9705 9662 3
(Applies to this bill only)

Internet Banking - EFT: Use the BSB and Account Number to pay directly from your bank account in Australian Dollars (AUD).
Account Name: StrataPay Bank: CBA, Sydney, Australia.

All payments made through StrataPay payment options are subject to their Terms and Conditions available at www.stratapay.com or by calling 1300 155 431 or email info@stratapay.com. By using the payment options provided by StrataPay you are taken to have read and understand their Terms and Conditions prior to using StrataPay. Credit card acceptance is subject to notation above. Additional charges may apply.

STRATAPAY

StrataPay Reference

[redacted]

Amount	Due Date
$0.00	This is the due date

[redacted]

99314/02100002 Lot 2/103

renee.soderlund
Ms Renee Soderlund
175 Varsity Parade
Varsity Lakes

*3599 9705966623

What's Better

- Bank Reconciliation - Account Group Building. posting interest to a different account group than the term deposit is for will now be prevented.
- Ledger Card From Last Zero balance was not working correctly –this has been resolved.
- Change Code - was failing if the code was being used by a saved Journal Prep journal that was not yet processed that was using the code associated with the Change Code. This has now been corrected.
- Debtor Adjustments - Crash is generated if an incomplete adjustment is closed after another adjustment has been completed.
- Account Group OC will now output successfully to Vic certificates.
- Inspections Issues - Excluded possibility of corrupted data being imported into issue whilst making code more efficient.
- Task Management - The Event Type drop down will now display in alphabetical order.
- Month End Rollover Configuration Security – When a user is denied access to the Edit Month End Rollover Configuration permissions they will no longer be able to change any configs.
- Report Distribution - Error generating the Email text when distributing Levy Notices, this has now been resolved and will now accept HTML for example - bold in the Email Levy Template.