Release Notes – Version 5.6.145

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 STRATAPAY

1. DocMax Code Refresh Stage Two - Overview

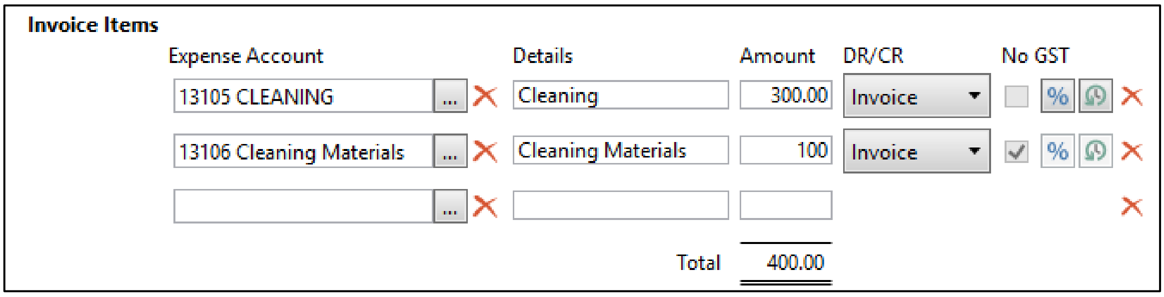
Included in this release is Stage 2 of the DocMax code refresh. This change brings the DocMax backend up to newer standards which will improve reliability and performance. While most of the work for this change has been done behind the scenes, there are a few noticeable differences.

- Document Properties - Invoice Details - Multi Expense Invoice Item - now adds another invoice line item when first item is completed.
- Document Properties - Invoice Details – Add GST option is now available.
- Document Properties – Invoice Details – View Expense Account History.
- Document Import – will now import .csv file.
- Sub-Groups and Lost buildings can now be filtered in searches and work queues.

1.1 Document Properties – Invoice Detail - Multi Expense

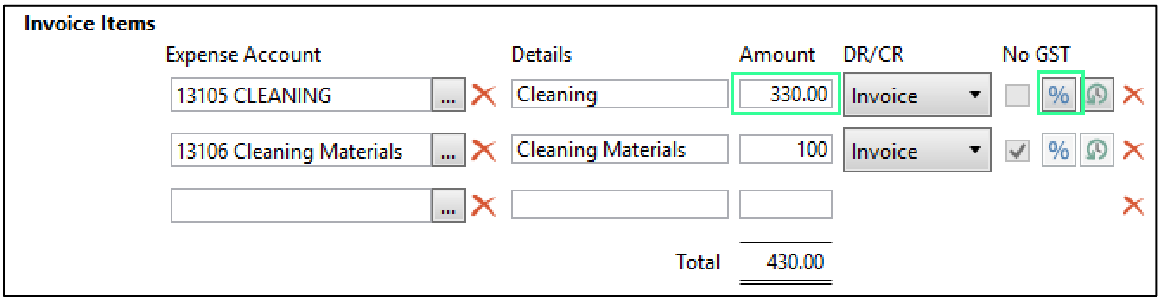
Additional Invoice items will now be automatically added when an expense account is set for the Invoice item above it which allows more streamlined data entry for multi expense invoices.

In Document Properties, expand the Invoice Details section, add an expense account to the first item. Another item will automatically be enabled. Further items are added once expense accounts are populated for the last line item.



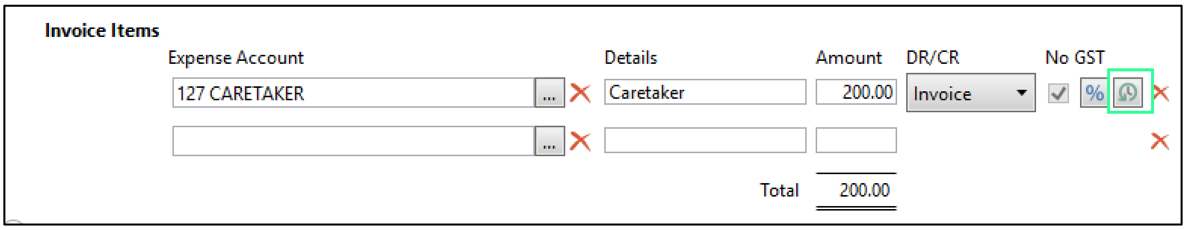
1.2 Document Properties - Invoice Details – Add GST option

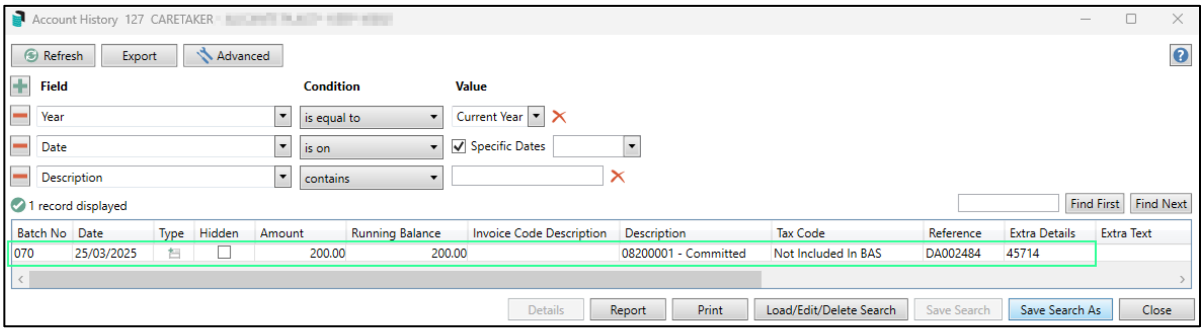
This release includes an option to add GST to Expense items which will be calculated as a percentage of the expense amount. Click the % icon to add GST to the line-item amount.



1.3 Document Properties – Invoice Details – View Expense Account History

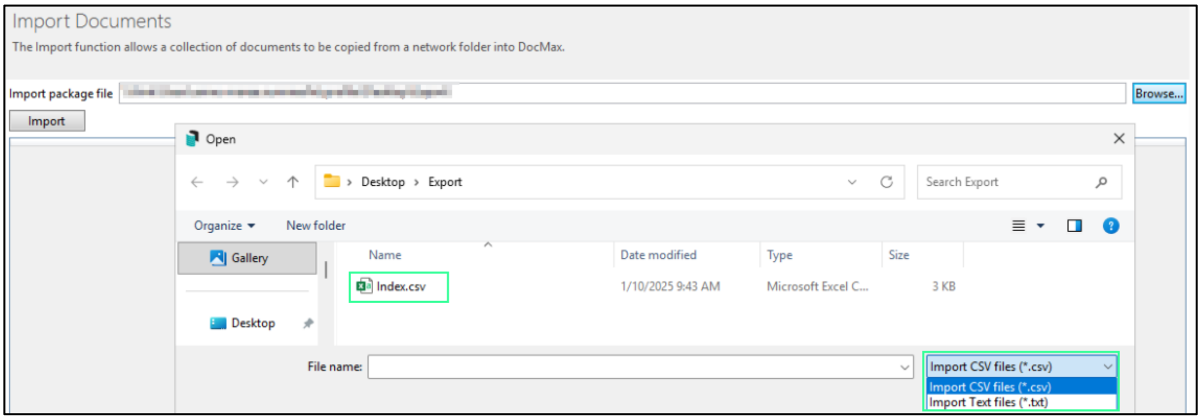
This release includes an option to view the history of the Expense Account from the Invoice line item. Click the icon to view the history of the account.





1.4 Document Import - .csv file types

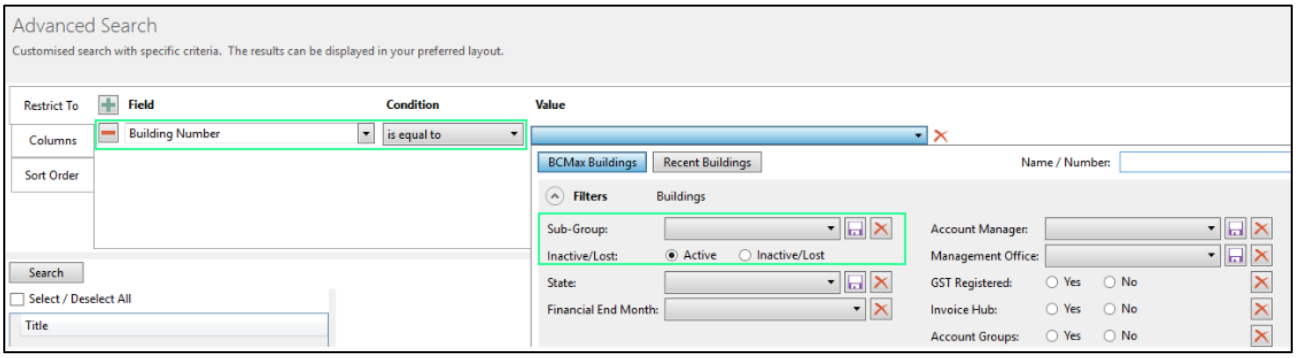
DocMax Import will now recognise .csv files for document import. This is particularly useful where building documents have been provided from previous managers with an exported index.csv file and removes the requirement to rename the file as txt.



1.5 Sub-Groups and Lost buildings

Sub-Groups and Lost buildings can now be filtered in searches and work queue restrictions.

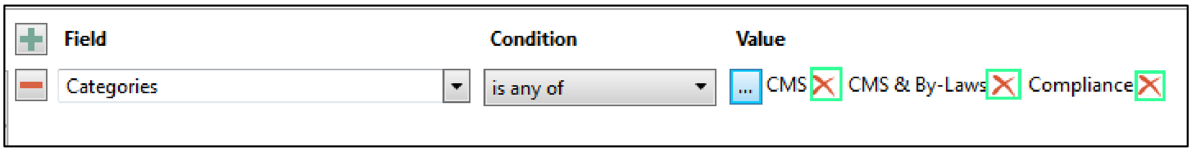
Use the Building Number restriction with condition 'Is Equal To' or 'Is Not Equal To' and click the building selector arrow to show the filter for Sub-Groups and Lost/Inactive buildings.



Use the Building Number restriction with condition 'Is Any Of' or 'Is Not Any Of' and click the building selector arrow to show all buildings including Sub-Group and Lost/Inactive buildings.

1.6 Categories – Is Any Of – Remove Individual Selection

Multiple categories that have been selected using the 'Is Any Of' restriction can now be easily removed individually by clicking the 'x' beside the selection that is no longer required.

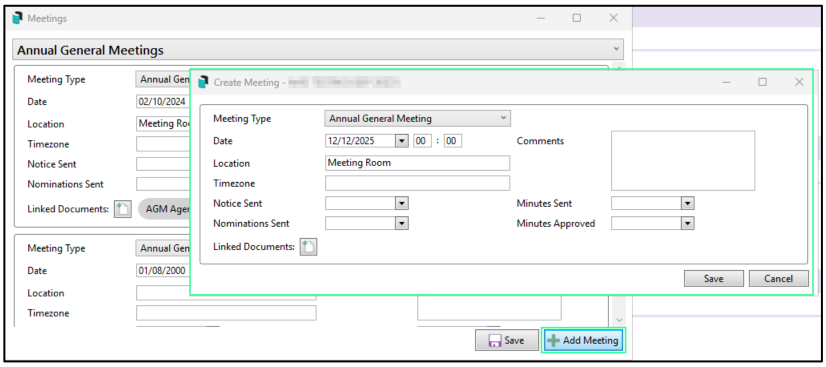


1.7 GLMax Company Documents

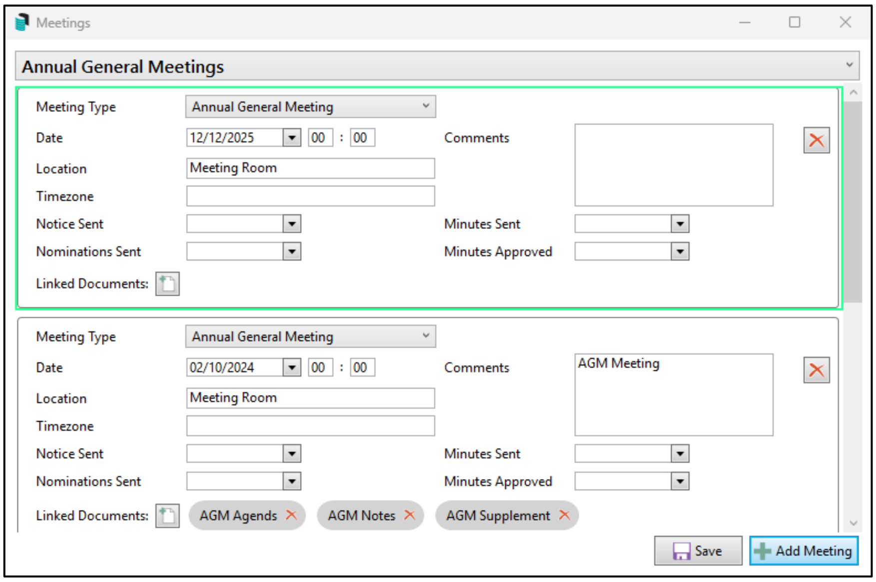
Property Documents will no longer be enabled for GLMax Company documents. Documents added for GLMax Companies should be set as Internal documents only.

2. Meeting Summary – Add New Meeting

Add New Meeting will now pop out a new meeting form when Add Meeting is clicked.



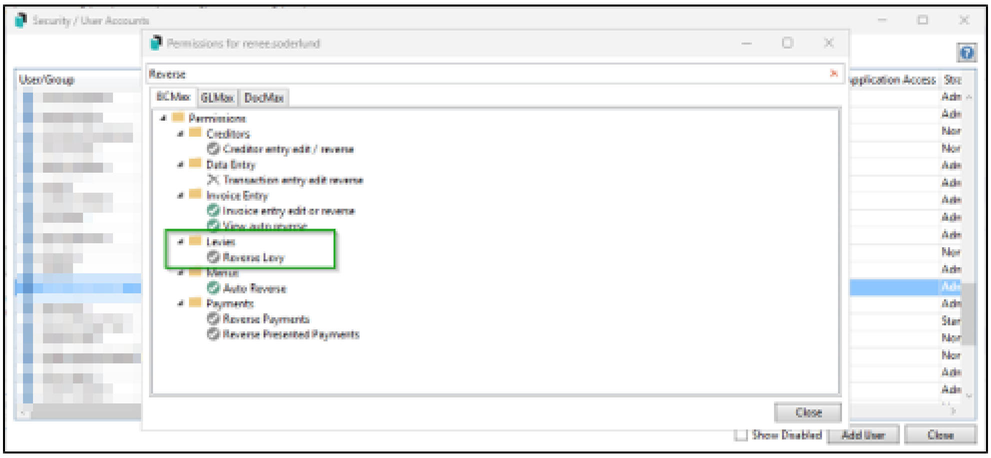
Once the details have been added and saved, the meeting details will be displayed in the Meetings screen in chronological order – the newest meeting at the top.



Navigate to Meeting Summary and click 'Add Meeting' to review the change.

3. New Security Permission – Reverse Levy

A new permission has been added to Security Setup for 'Reverse Levy,' If set to Deny the Reverse Levy option will be greyed out and not available to the user.



4. Report Distribution – Resume Failed Distribution

Report Distribution has been enhanced to track distributions and enable the ability to resume a distribution that has failed. For example, if a printer was offline or invalid at the time of distribution, Report Distribution can now be set to resume for the reports or letters that were not sent.

If a distribution is not completed, the Report Distribution log will now show options to:

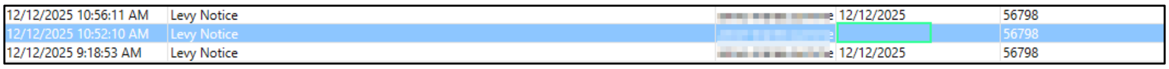
Resume - Resumes the Distribution from where it failed.

Repeat All – Start the original Distribution again.

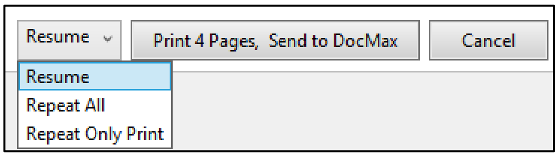
Repeat only Print – Start the Distribution for records set to print only.

Use the following steps to see this change:

1. Navigate to the Report Distribution log
2. Select the Distribution that was not completed – incomplete distributions will not have a finished date



3. Click View
4. Select Resume, Repeat All or Repeat Only Print to complete the Distribution



Once completed the distribution will be marked with a Finished date in the log.

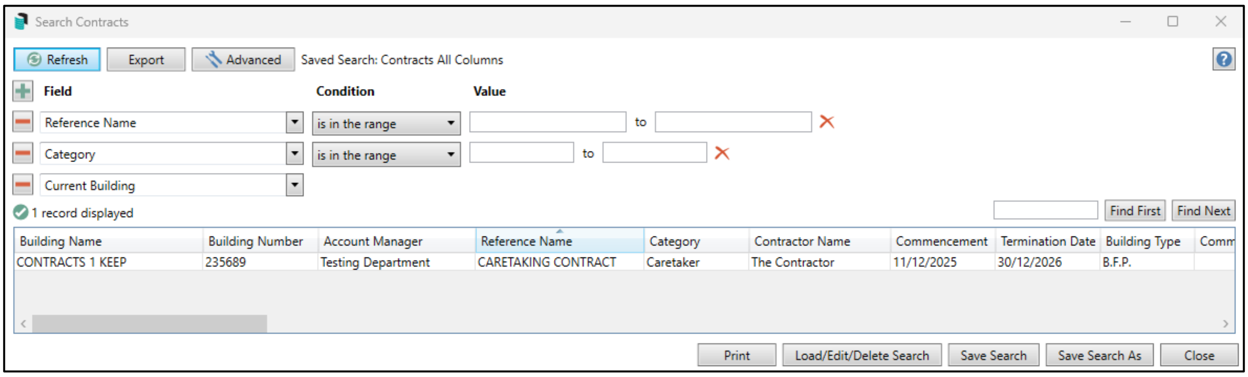
Note: Emails can be resent from the Communications log if required.

5. Search Contracts

A new feature titled 'Search Contracts' is introduced with this release to allow searches for contracts for local buildings and across a global portfolio.

Search and select 'Search Contracts' to open the new search. The following fields will be available to set as filter restrictions.

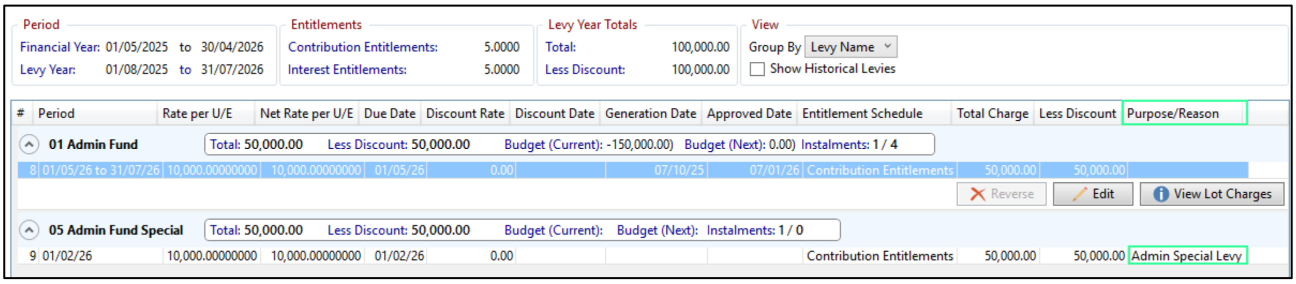
Reference Name
Category
Contractor Name
Contractor Address 1
Contractor Address 2
Contractor Address 3
Details of Duties
Delegated Powers
Estimated Cost of Contract
Estimated Cost of Renumeration
Estimated Cost Outlays
Basis of Renumeration
Commencement Date
Terms of Contract
Options
Copy of Agreement on File
Name of Financier
Date of Advice from Financier
Date of Withdrawal of Financier
Worker Comp Number
Termination Date
Next Option renewal date
Option Notice Period
Last renewal Date
Increase Rate
Expiry Date
Common Property Group
Doc ID
Taken on Date
Building Type
Regulatory Module
Account Manager
Management Office
Legislation



Search results can be exported to Excel or printed in report format.

6. Levy Management – Purpose / Reason

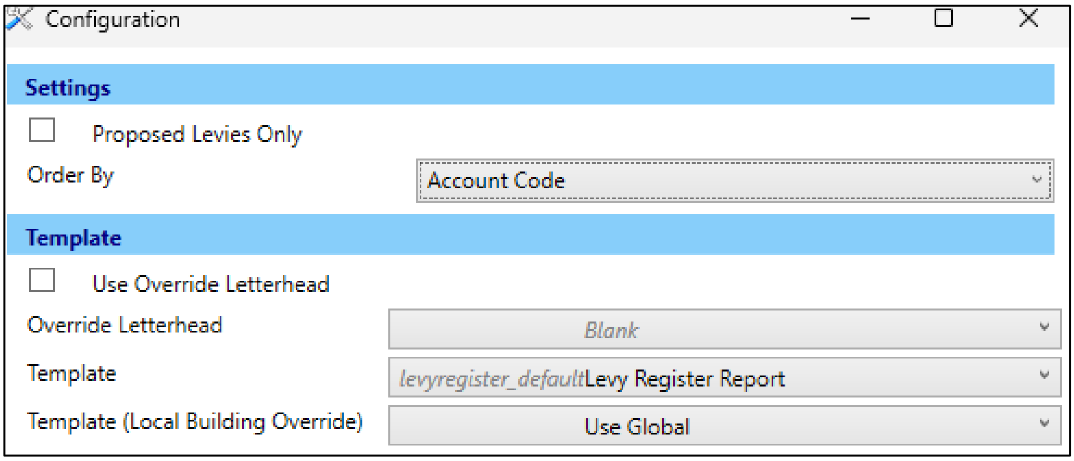
The Levy Management screen will now include a column to show Purpose / Reason for Special Levies.



7. Levy Register and Levy Register Summary report

The Levy Register Summary report will now be Order by the settings for the Levy Register report.

1. Navigate to Levy Management
2. Select Reports> Levy Register
3. Select Cog, set Ordered by to Account Code



4. Select Reports> Levy Register Summary

Page 1	LEVY REGISTER SUMMARY	30 April 2025

Levy Year Start	Levy Year End	Last Annual General Meeting	Entitlements	Total Number of Lots	Financial Year Start	Financial Year End
01/02/2025	31/01/2026	23/04/2025	1044.0000	97	01/02/2025	31/01/2026

Description	Period	Determined	Rate per U/E	Due Date	Discount Rate	Discount Date	Notice Date	Schedule	Total
Admin Fund	01/02/25 to 30/04/25	03/04/2024	370.3700	28/02/2025	20.00	28/02/2025	13/01/2025	Contribution	386,666.28
Admin Fund	01/05/25 to 31/07/25	03/04/2024	370.3700	31/05/2025	20.00	31/05/2025	07/04/2025	Contribution	386,666.28
Admin Fund	31/03/25 to 30/06/25	06/10/2025	110.0000	01/07/2025	20.00	31/07/2025	01/07/2025	Contribution	114,840.00
Admin Fund	01/02/26 to 30/04/26	29/10/2025	170.0000	08/07/2025	20.00	07/08/2025	08/07/2025	Contribution	177,480.00
Admin Fund	01/05/26 to 31/07/26	30/10/2025	170.0000	29/07/2025	20.00	28/08/2025	29/07/2025	Contribution	177,480.00
Admin Fund	01/08/25 to 31/10/25	06/10/2025	370.3700	01/08/2025	20.00	31/08/2025	01/08/2025	Contribution	386,666.28
Admin Fund	01/08/26 to 31/10/26	30/10/2025	170.0000	18/08/2025	20.00	17/09/2025	18/08/2025	Contribution	177,480.00
Admin Fund	01/11/25 to 31/01/26	06/10/2025	170.0000	01/11/2025	20.00	01/12/2025		Contribution	177,480.00
Admin Fund	01/11/25 to 31/01/26	06/10/2025	190.0000	01/11/2025	20.00	01/12/2025	01/11/2025	Contribution	198,360.00
Sinking Fund	01/02/25 to 30/04/25	03/04/2024	62.9200	28/02/2025	20.00	28/02/2025	13/01/2025	Contribution	65,688.48
Sinking Fund	01/05/25 to 31/07/25	03/04/2024	62.9200	31/05/2025	20.00	31/05/2025	07/04/2025	Contribution	65,688.48
Sinking Fund	01/08/25 to 31/10/25	09/10/2025	76.0870	01/08/2025	20.00	01/08/2025		Contribution	79,434.98
Sinking Fund	01/11/25 to 31/01/26	09/10/2025	76.0870	01/11/2025	20.00	01/11/2025		Contribution	79,434.98

8. Task Management – Enhancements

The following enhancements have been made to the Task Management module.

1. Create New Task – Double Click
2. Notifications

8.1 Double clicking to create a New Task

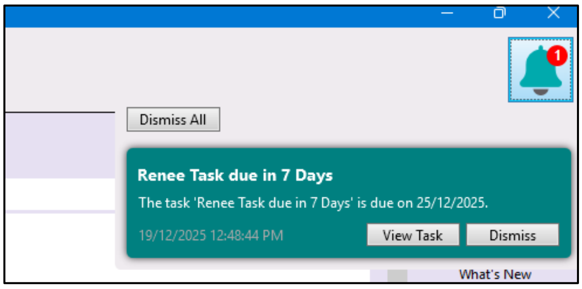
In Task Management, where the views allow e.g. calendar view a user can now double click a blank space on a date to create a new task. These newly created tasks will then be saved and show on all Task displays.

If there are existing tasks a user can now double click the task to open that task.

8.2 Notification – Upcoming work

All tasks that are due will now show as a notification in the main screen of BCMax. To receive a notification the following rules, apply:

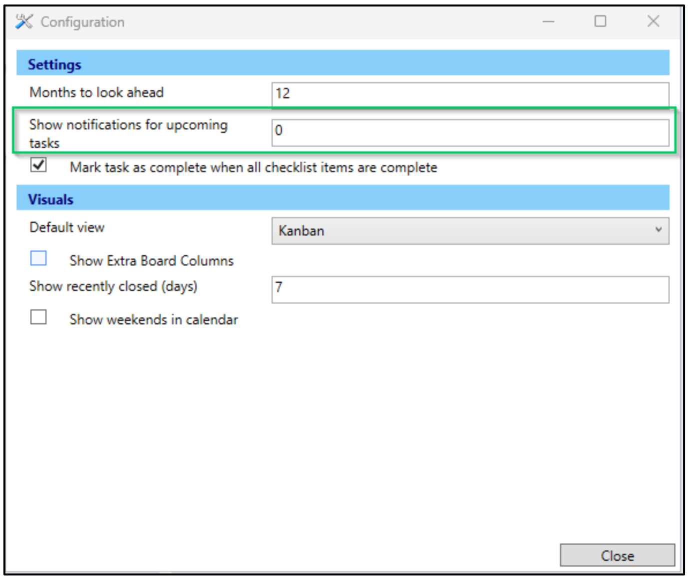
- Default is 7 days ahead and that are not marked as Complete
- All overdue tasks will appear unless marked as Completed
- Once marked as complete – they will appear under the notification bell until BCMax is closed and re-opened.



8.2.1 Configuration – upcoming task notification

If a user prefers to disable notifications or adjust the default 7-day notification period they can update the configuration setting to '0 days' or '14' days for example to extend the notification time by following the steps outlined below"

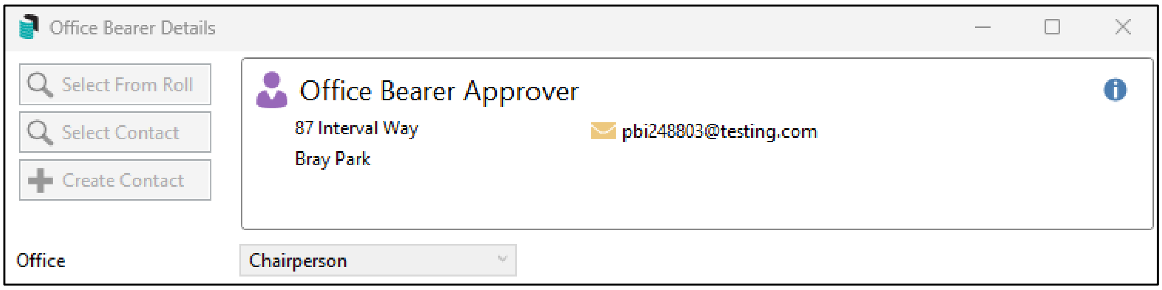
1. Navigate to Task Management
2. Click on the Cog available on the UI
3. Change the default from '7' to '0'



9. Office Bearers – Invoice Hub Approvers

The ability to change the Contact Entity or Office Held on an Office Bearer Contact record once it is linked to a Portal User Account will now be disabled to prevent conflicts on the Invoice Hub.

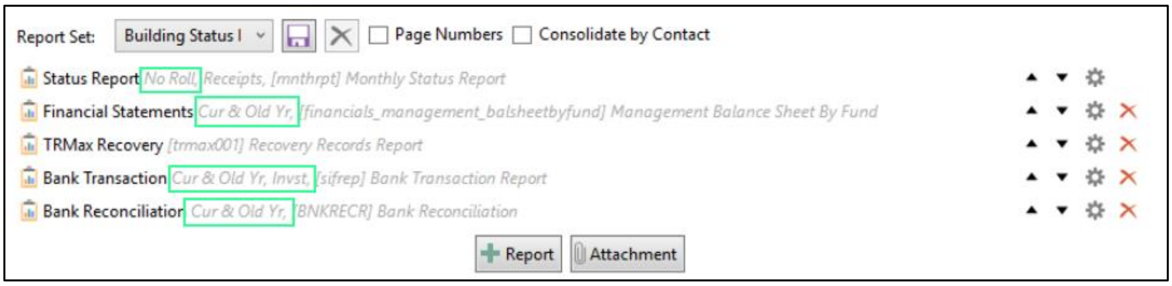
If the position has changed or the Office Bearer has changed, the Office Bearer record should be resigned, and a new one should be created for the new committee member.



10. Report Distribution – Global Report Configurations

Report Distribution will now show abbreviations of some Global Report configurations in the Report Distribution screen. This is to assist in determining if the correct report settings are configured for the user's requirements.

For example, where reports can be configured for Old Year, Current Year or both, the configuration will now show beside the report.



11. Owners Tax Year Report

11.1 New Menu Item

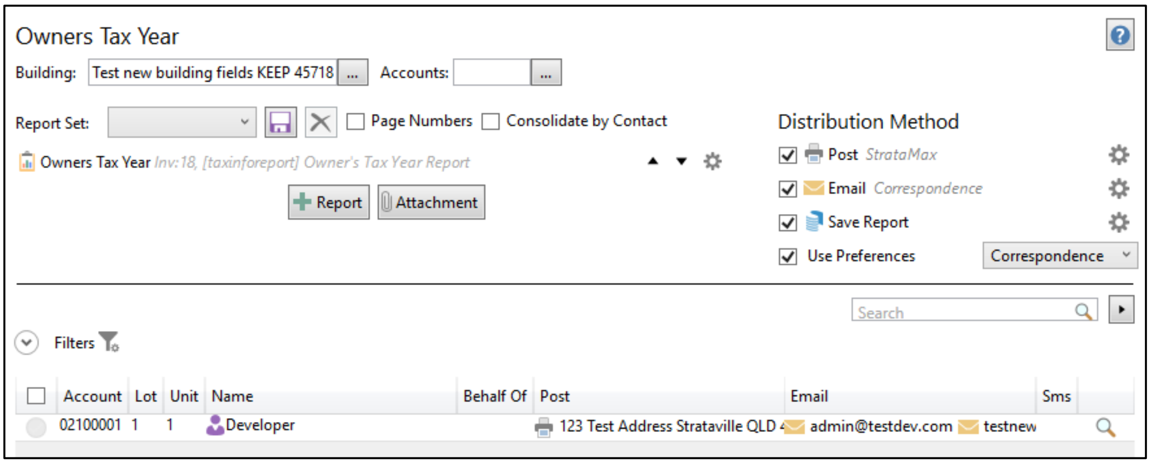
A new menu option has been created for the StrataMax main menu to allow clients to generate the Owner's Tax Year Report in Report Distribution mode.

Use the following steps to access the new report:

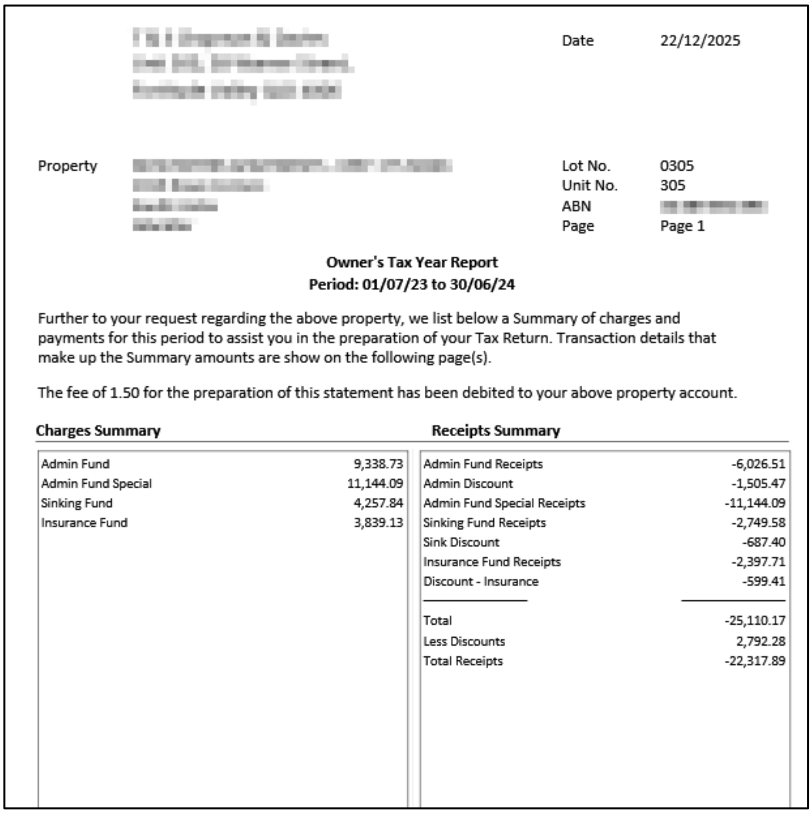
1. Navigate to StrataMax Main menu search
2. Search and select 'Owner's Tax Year Report'

11.2 Owner's Tax Year Report – Report Distribution

The Owner Tax Year Report will open in Report Distribution mode when run from the new menu item icon showing lots configured to receive the report.



Tag the lot and proceed to generate the report.



Date 22/12/2025

Property

Lot No. 0305
Unit No. 305
ABN
Page Page 1

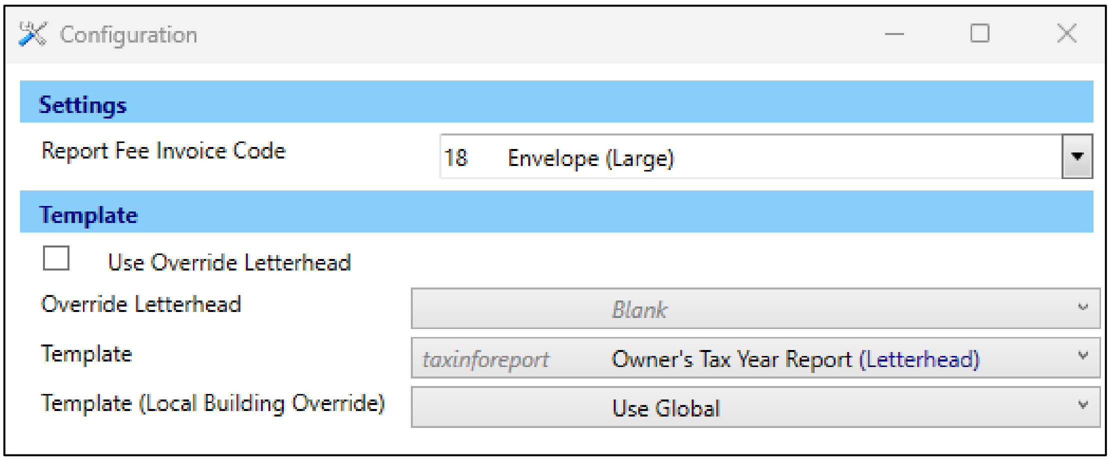
Owner's Tax Year Report
Period: 01/07/23 to 30/06/24

Further to your request regarding the above property, we list below a Summary of charges and payments for this period to assist you in the preparation of your Tax Return. Transaction details that make up the Summary amounts are show on the following page(s).

The fee of 1.50 for the preparation of this statement has been debited to your above property account.

Charges Summary		Receipts Summary	
Admin Fund	9,338.73	Admin Fund Receipts	-6,026.51
Admin Fund Special	11,144.09	Admin Discount	-1,505.47
Sinking Fund	4,257.84	Admin Fund Special Receipts	-11,144.09
Insurance Fund	3,839.13	Sinking Fund Receipts	-2,749.58
		Sink Discount	-687.40
		Insurance Fund Receipts	-2,397.71
		Discount - Insurance	-599.41
		Total	-25,110.17
		Less Discounts	2,792.28
		Total Receipts	-22,317.89

Click the configuration cog to set configuration options for this report.

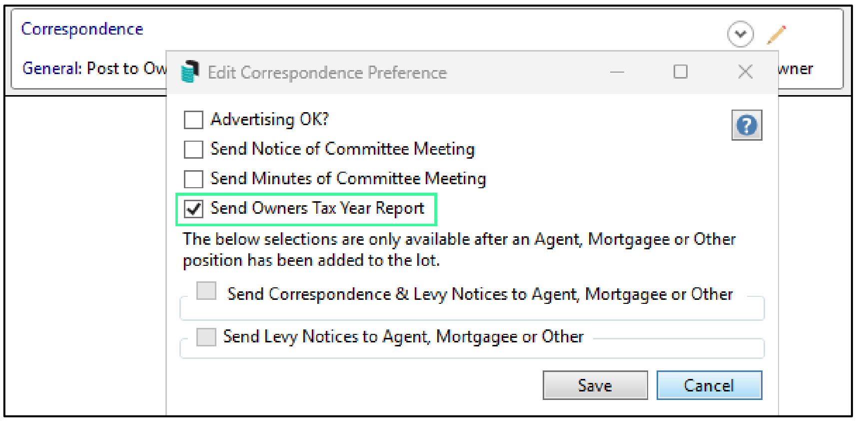


11.3 Owner's Tax Year Report Setup - Roll

'Setup from the Owners Year Tax Report configuration via Ledger Card will be migrated to the roll as part of this update and all future changes must be made in the Roll.'

To set up the Owner's Tax Year Report for Report Distribution, use the following steps:

1. Navigate to the Roll
2. Select the Lot / Owner the report is required for
3. Click the Edit Correspondence icon
4. Tick the Send Owner's Tax Year Report field
5. Save



The lot will then be available for the report in Report Distribution.

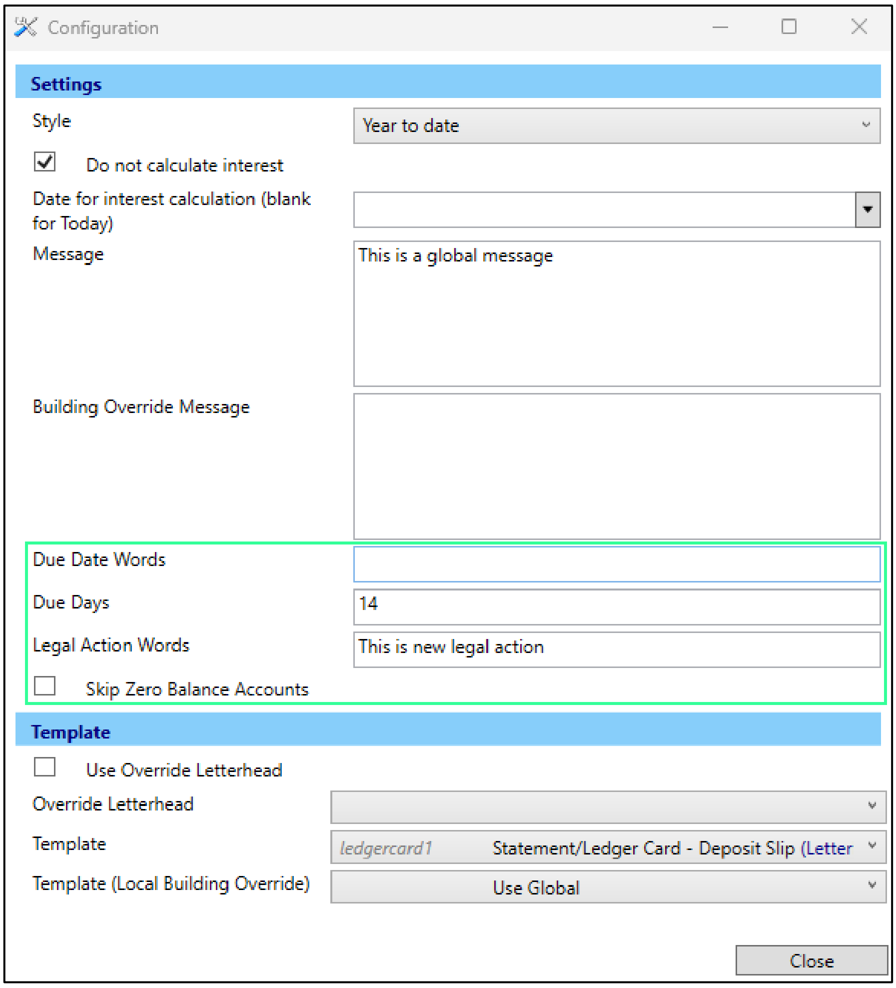
Note: The report can still be generated via Ledger card using the current process.

12. Ledger Card Preview Feature Enhancements

12.1 Ledger Card configurations

The following configuration options have been added to the Ledger Card Report Distribution Preview Feature.

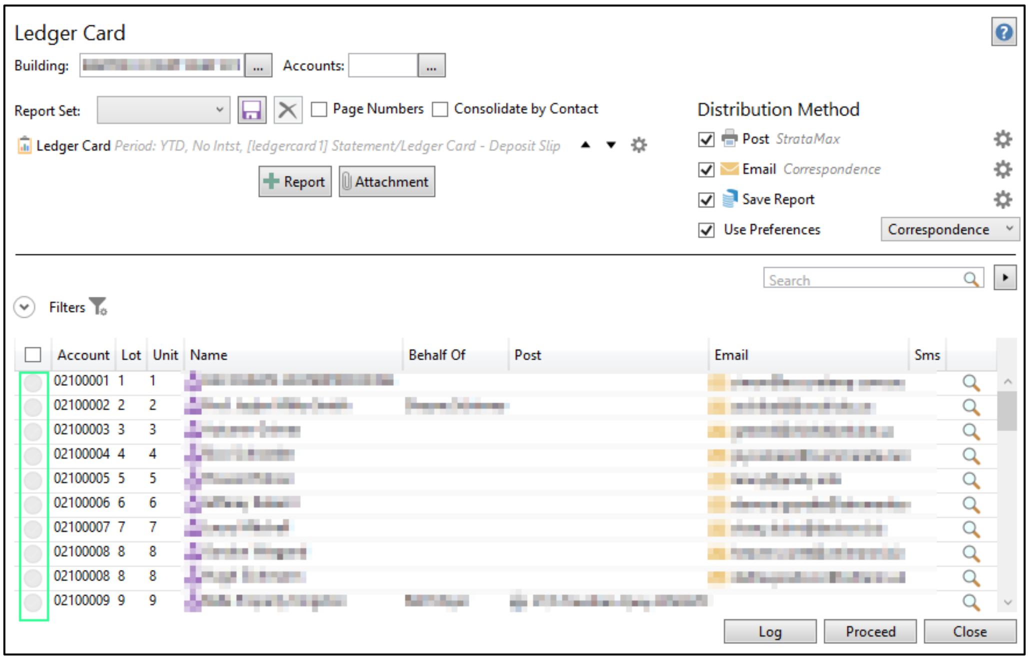
- Edit Legal Action Words
- Edit Due Date Words
- Set Due Days
- Skip Zero Balance Accounts



Note: Wording and settings from the old Ledger Card configurations will be copied on upgrade. After upgrade, the screens will be independent, and any changes will only be reflected in the module in which they were made. For example, if Legal Action words are changed in the old Ledger Card screen, they will not be updated in the new Preview Feature Ledger Card configuration and vice versa.

12.2 Tagged Lots – Default

Recipients will no longer be tagged by default when the Ledger Card screen is opened to ensure notices are not issued unintentionally, Accounts will need to be tagged as required when accessing the Ledger Card screen.



12.3 Receipt Entry and Utility Buildings Ledger Card

Receipt Entry and Utility Buildings will now open the Ledger Card in Report Distribution mode if set in Preview Features.

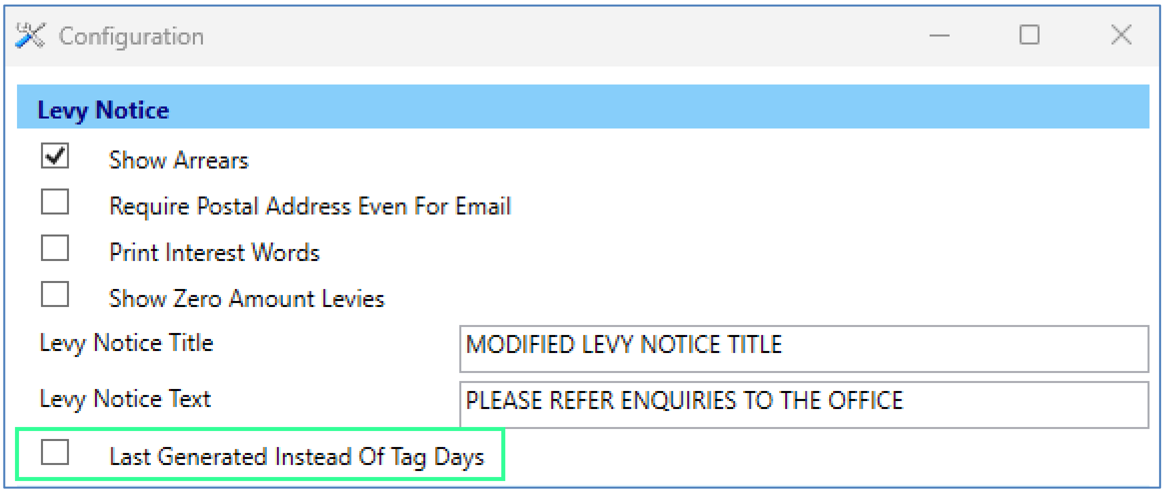
Note: Ledger Card Second Debtors (Run from Receipt Entry) will be activated to run in Report Distribution mode in a future version.

13. Levy Notice Configuration – Last Generated Instead of Tag Days

A new setting has been added to the Levy Notice configuration in Report Distribution to allow a levy notice to be produced showing the last generated levies regardless of the set tag conditions in Levy Management. This is particularly useful when sending Welcome Packs where the last generated levies fell outside the tag conditions dates.

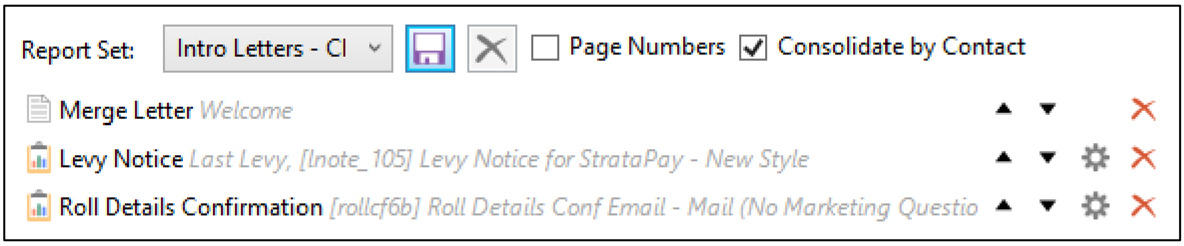
To see the new setting use the following steps:

1. Navigate to Merge Letters
2. Untick Merge Letters
3. Select Levy Notice
4. Click the Configuration Cog
5. Set 'Last Generated Instead of Tag Days' setting



We recommend that this setting be saved for Change of Ownership and Change of Details Report sets if there is a Levy Notice included to ensure a notice is produced for Welcome Packs and Change of Details.

To do this navigate to Merge Letters and click cancel. Select the Change of Ownership of Change of Details Report set, click the configuration icon, and set 'Last Generated Instead of Tag Days' setting. Close and save the report set.

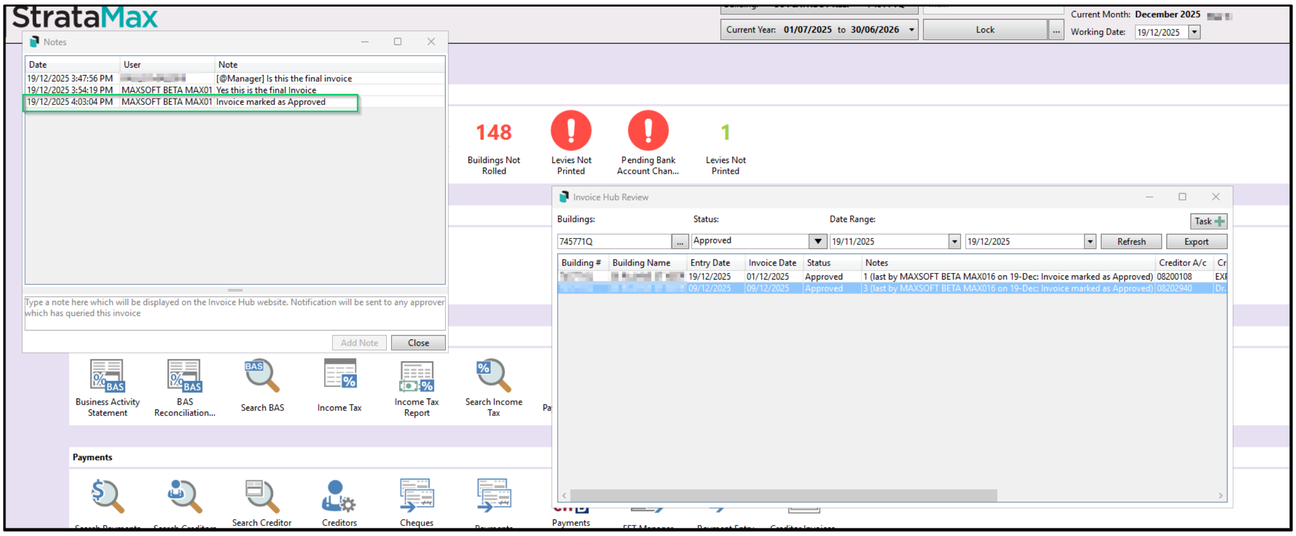


NOTE: This setting will not affect notices when running from Levy Management after Generating Levies which will produce notices based on levies generated using set tag conditions.

14. Invoice Hub – Wording enhancement

The wording in BCMax/Invoice Hub notes has been updated to 'Invoice marked as Approved' when invoices have been approved on the portal.

Example Below:



15. Preview Features – Planned for removal

As part of recent re-writes, the preview features have allowed for gradual roll out while also maintaining original functionality via the older interfaces. It is planned in version 5.6.147 that the following will be removed.

- Certificates
- Subgroup Update Report
- Receipt Report
- Report Set

It is recommended that users use the new functionality in advance of this version.

What's Better

- Status Reports – When producing a status report the report was displaying 01/01/01 date in the totals row in Payments section. This has now been resolved.
- Bank Reconciliation - Create Receipt/ Allocation where there was not an account code selected was crashing. This has now been resolved
- New Building - Create new building was no longer setting the building as selected when saved. This has been corrected.
- Lot Balance Report – Lot and Unit numbers were not displaying. This has now been resolved.
- Report Distribution - Transaction List configurations will now be retained when saved for report sets
- Building backup – Inspection Type categories were not being backed up correct. This has now been resolved.
- Roll - Adding the same contact to a roll account multiple times will now be prevented
- DocMax - Profiles. Action Date will be retained in UI after closing and re-opening.
- Report Distribution - Owner Info and Owner Info Ledger reports will now produce different reports.
- Contact Management - Merge two contacts of the same type for a lot will no longer crash
- Merge Letter – when deleting from Report set was crashing. Validation message advising that merge letter cannot be deleted now displays.
- Payments Management – when viewing payments screen and another user reversed a payment, system would crash. This have been resolved.
- New Creditors – if two users tried to create new Creditors at the same time, system would crash. This has been resolved
- Bank Reconciliation – if two users processed a bank statement at the same time, system would crash. This has been resolved
- Inspections – if two users Imported Inspections at the same time, this would produce an error. Now a validation message will appear
- Report Distribution – Receipt Report Start and End date configuration was being retained when the report closed and re-opened. This has been resolved.
- Task Management - Manual Generate Auto Task option has been removed from the UI. The Scheduled and event driven tasks are all created by scheduler now.