

Release Notes – Version 5.6.149

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



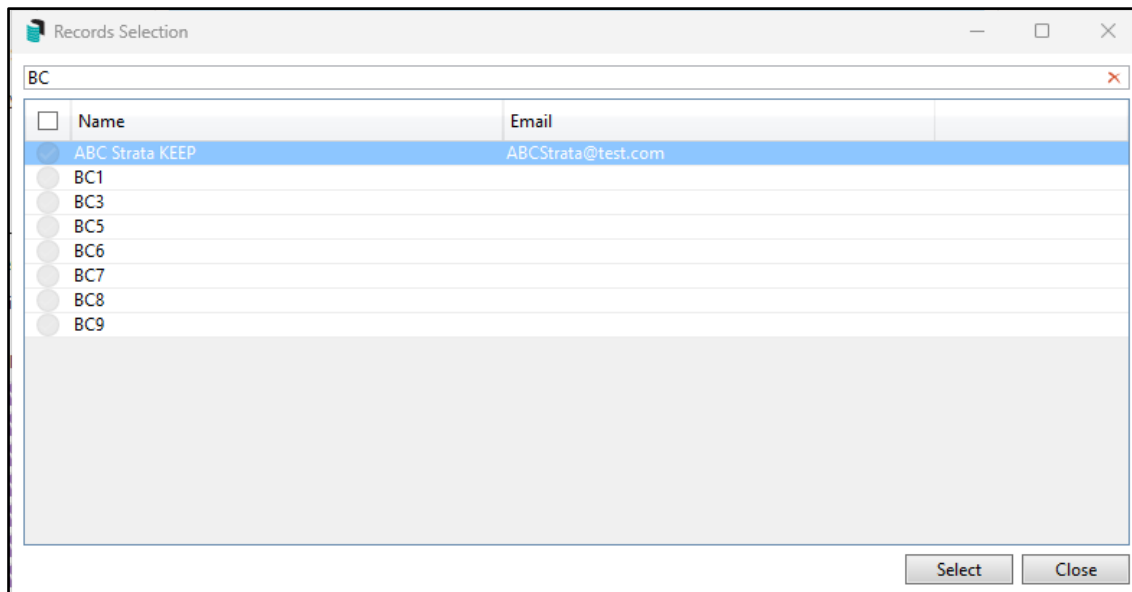
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What's New

1. Levy Generation Schedule – Account Manger

Enhancements have been made to the new account manager configuration to allow users to search Account Managers available in the list. To access this configuration, follow the below steps:

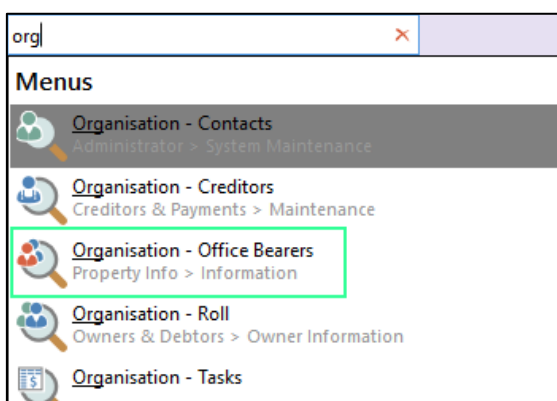
1. Navigate to Levy Management.
2. Click on Reports.
3. Select Levy Generation Schedule.
4. Click on the Configuration option.
5. New Account Manager Field will be available.
6. Click on the Account Manger option.
7. Account Manager selection list will appear.
8. New Search field will now be available.
9. Type Account Manager in the Search field and the system will return the matching Account Manager entered into the search.



2. Organisation Search – Office Bearers

A new organisation search is now available to search Office Bearers across organisations. The search is available to users who have access to multi drives.

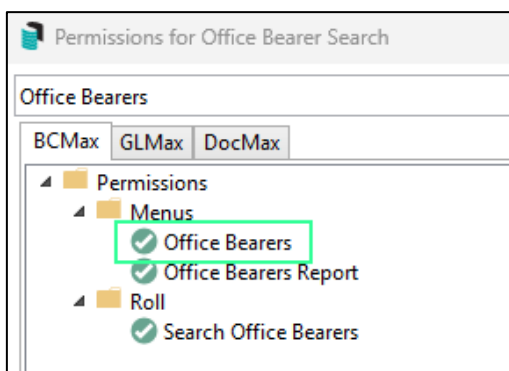
If logged in where multi drive access is available, search and select 'Organisation – Office Bearers.'



Searches can be saved and added as Dashboard items if required.

2.1 Organisation – Office Bearers Security

The Organisation – Office Bearers search security access is controlled by the Office Bearers Menu permission. User will need to have allow permissions on each drive they are using for the search to see results for the drive.



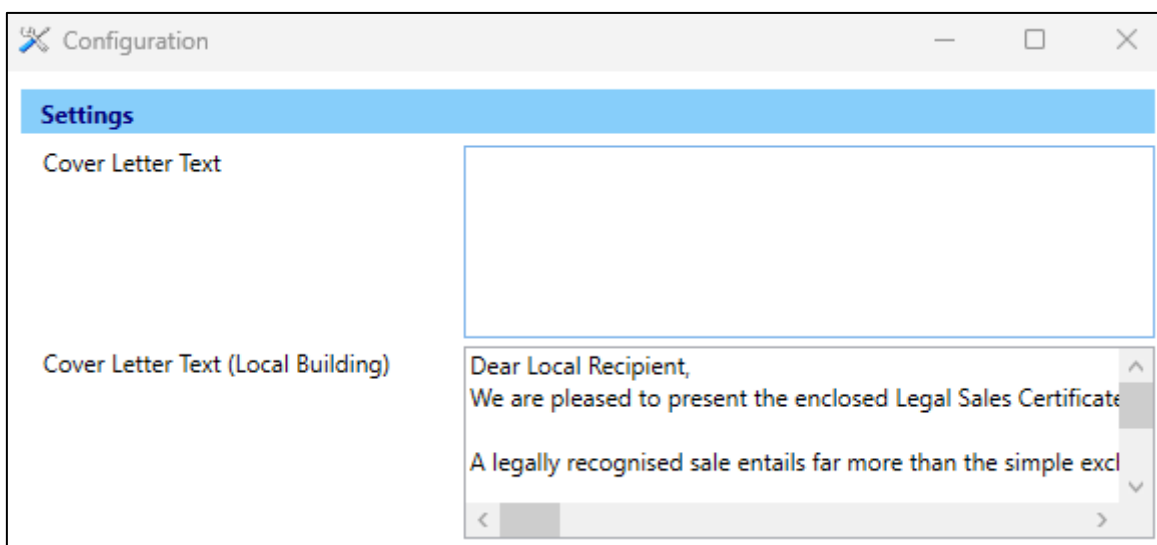
3. Certificate Cover Letter – Local and Global Text

The local text character limit for Certificate cover letters has been extended and will now allow up to four thousand characters of text.

While both the Local and Global cover letter text allow for four thousand characters, the letter can only produce one page, and we therefore recommend not exceeding two thousand characters to prevent formatting issues.

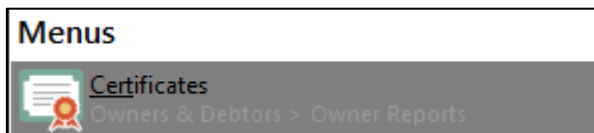
The ability to extend the number of pages for a cover letter will be introduced in a future release.

Navigate to Certificates and click the configuration cog beside the cover letter to view the Global and Local cover letter text fields.

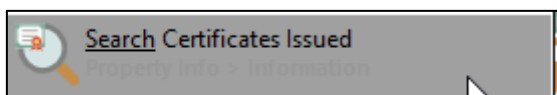


4. Certificates menu updates

The Certificates (Disclosure Statement) menu icon in StrataMax will now be titled Certificates, and the Disclosure Statement will not be able to be produced via the Certificates menu.



A new menu option 'Search Certificates Issued' has been created to allow searching for Certificates issued. The search screen will provide current search functionality in line with other StrataMax searches.



Field	Condition	Value
Building Name	starts with	the

7 records displayed

Building Number	Building Name	Date	Applicant Code	Applicant Name	Lot No.	Lot Account Code	Fee	Paid	Delivered By
1	1	04/08/2025	02100005	1	1	02100005	150.00	Paid	Emailed
1	1	17/09/2025	02100014	1	1	02100001	15.00	Paid	Printed
1	1	17/09/2025	02100014	1	1	02100001	15.00	Paid	Printed
1	1	17/09/2025		1	1	02100001	150.00	Paid	Emailed
1	1	17/09/2025		1	1	02100003	150.00	Paid	Printed
1	1	17/09/2025		1	1	02100004	150.00	Paid	Emailed
1	1	17/09/2025	02100007	1	1	02100007	150.00	Paid	Emailed

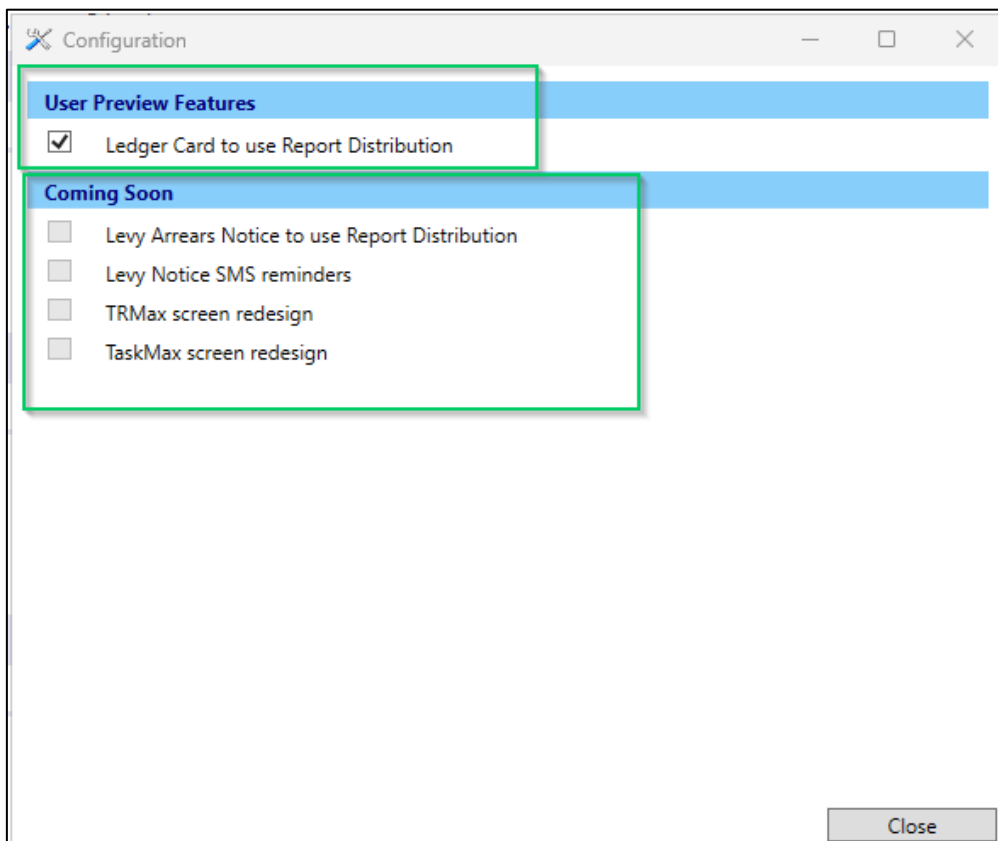
5. Preview Features – Removed

We have now retired a number of legacy views and removed the Preview Feature configurations. The following modules will now automatically use Report Distribution.

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

Please note – the legacy Ledger Card will still have a ‘User Preview Feature’ configuration available but will be retired also in the future.

Users will now also have the ability to view ‘Coming Soon’ other feature previews that we also have coming up.

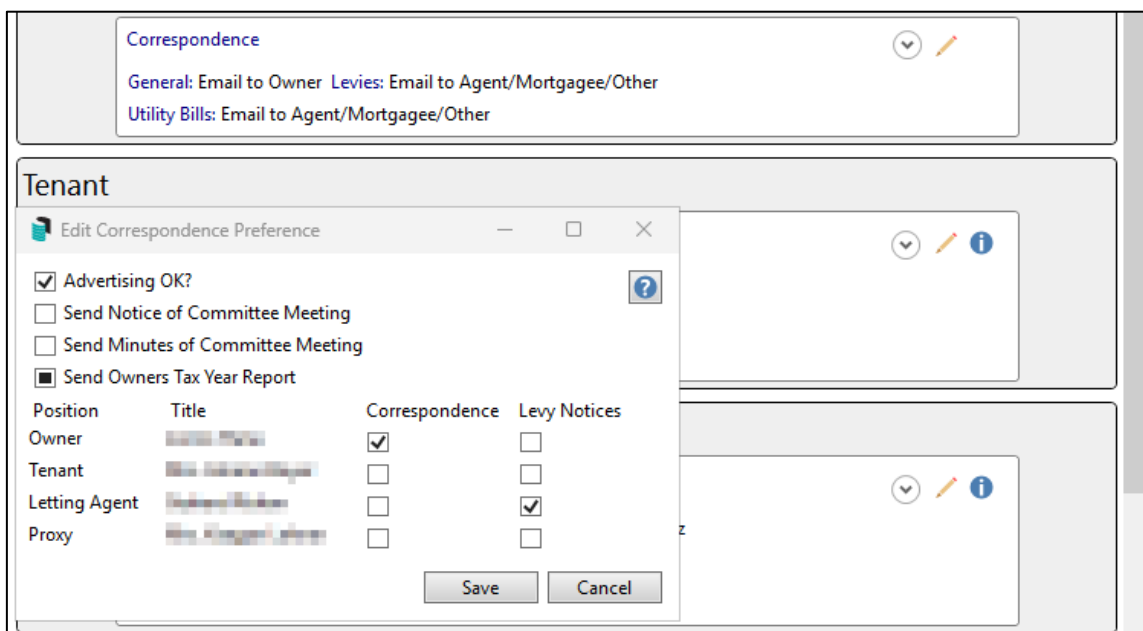


6. Roll – Edit Correspondence Preferences

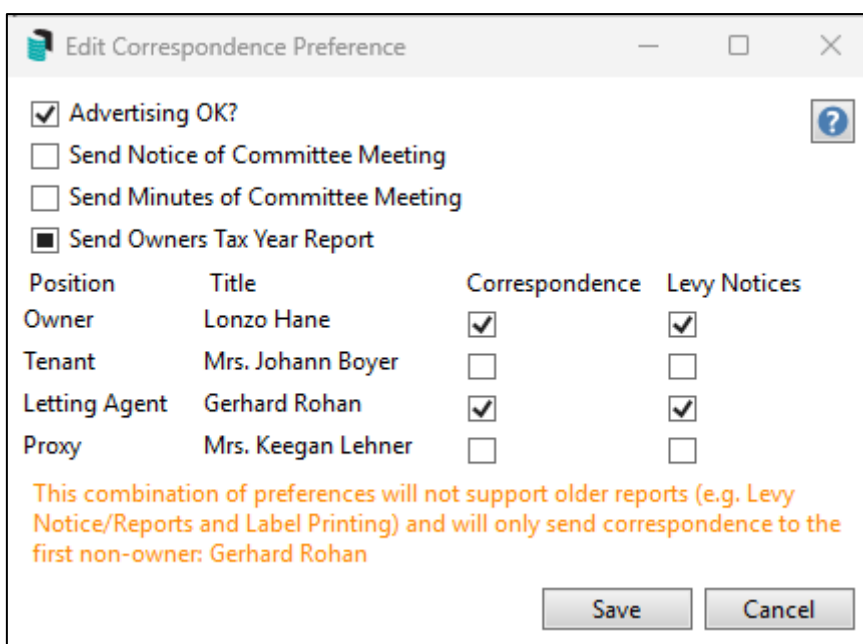
This version introduces new functionality in the Roll that allows a user to specify whether they want to send correspondence or levy notices to be sent to the owner only, the agent/mortgagee/other only or both. Correspondence Preferences can now be set using a tick box where multiple recipients can be selected for delivery regardless of whether they are owner, agent, mortgagee or other.

This is particularly useful where clients want correspondence to only go to the agent or where the lot has more than one ‘other’ representative.

Navigate to the Roll and click the 'Edit Correspondence Preferences' icon to review the change. Recipients can be set by ticking the box for the type of documents the position holder should receive.



These settings will be used in new report distribution screens for reports, notices, and merge letters but older screens may not support selections. For example, Levy Notices and Reports will not support sending notices to more than one 'other' recipient type. This will be indicated in the Edit Contact Preferences screen when set.



Please Note: If there are no delivery preferences specified for a particular delivery method, the option to set this in Correspondence Preferences will be disabled.

Position	Title	Correspondence	Levy Notices
Owner	[Redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tenant	[Redacted]	<input type="checkbox"/>	<input type="checkbox"/>
Letting Agent	[Redacted]	<input type="checkbox"/>	<input type="checkbox"/>
Proxy	[Redacted]	<input type="checkbox"/>	<input type="checkbox"/>

Delivery Preferences	
Correspondence	<input type="checkbox"/> Send by post <input type="checkbox"/> Send by email
Levy Notice	<input type="checkbox"/> Send by post <input type="checkbox"/> Send by email
Utility Bill	<input type="checkbox"/> Send by post <input type="checkbox"/> Send by email

7. Statement / Ledger Card (Second Debtors)

7.1 New Style Templates (Report Distribution)

The following templates have been updated to the new style, enabling Ledger Card Second Debtor to use Report Distribution when preview is enabled for Ledger Cards.

- ledgercard_3 – Statement/Ledger
- ledgercard_a1
- ledgercard_b1
- ledgercard_g1
- ledgercard_i1
- ledgercard_rpt_0
- ledgercard_sp1
- ledgercard_w1
- ledgercard_wb1
- ledgercard1

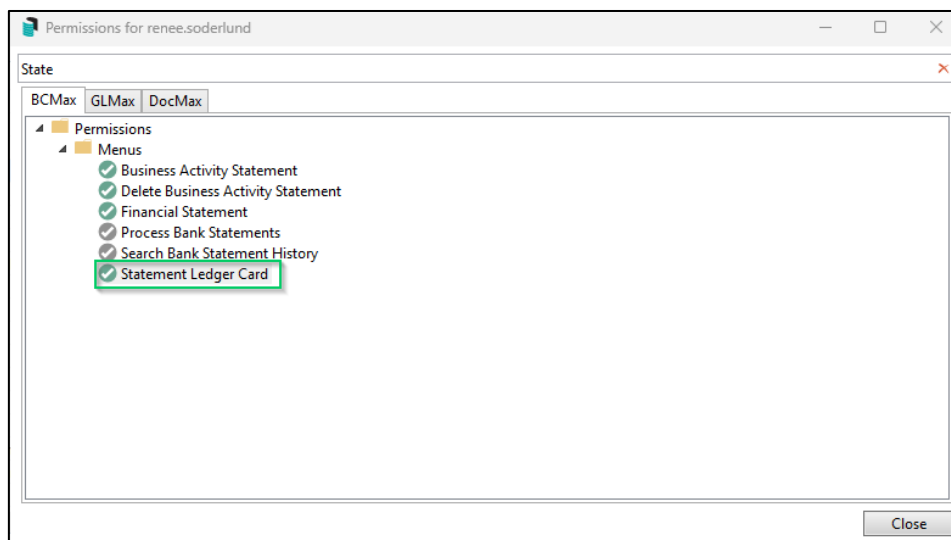
- LedgerCardInternal

To apply a template, open the Statement/Ledger Card (Second Debtors) in preview mode, select the configuration cog, and choose the required template from the Template drop-down menu, as shown below:

ledgercard_a1	Statement/Ledger Card - Building Address
ledgercard_3	Statement/L-Card - DepositSlip - Addr Barcode - RD (Letterhead) (Deposit)
ledgercard_a1	Statement/Ledger Card - Building Address -RD (Letterhead) (Deposit)
ledgercard_b1	Ledger Card Addr Bar Code- DepositSlip - RD (Letterhead) (Deposit)
ledgercard_g1	Company Statement - Deposit Slip - RD (Letterhead) (Deposit)
ledgercard_i1	Ledger Card International - RD (Letterhead) (Deposit)
ledgercard_rpt_0	Ledger Report - RD (Letterhead)
ledgercard_sp1	Ledger Email StrataPay -RD (Letterhead) (Deposit)
ledgercard_w1	Statement/Ledger Card - BCLHD-RD (Letterhead) (Deposit)
ledgercard_wb1	Ledger Card Bar Code BCLHD - RD (Letterhead) (Deposit)
ledgercard1	Statement/Ledger Card - Deposit Slip (Letterhead) (Deposit)
LedgerCardInternal	Ledger Card - No Recipient (Letterhead) (Deposit)

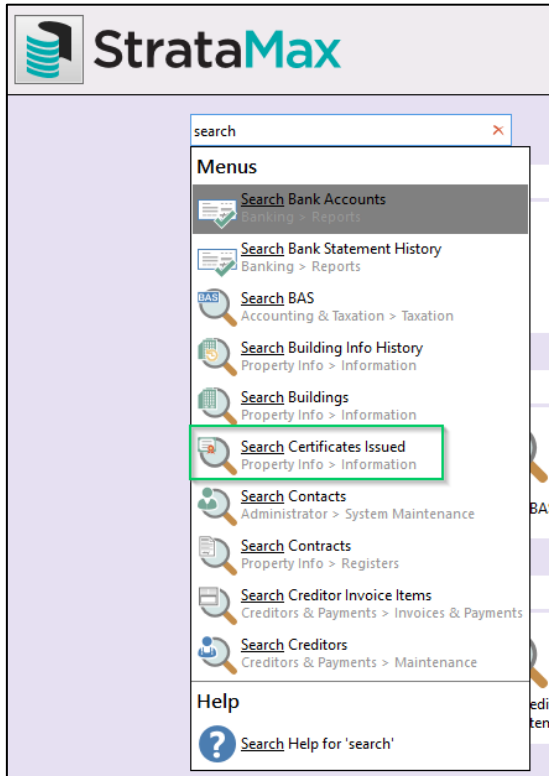
7.2 Security Statement/Ledger Card Second Debtors

To access the Statement/LedgerCard Second Debtors security permissions to the following menu will need to be set:



8. New Search – Certificates Issued

A new search has been added “Search issued certificates. This is available via a new menu option as shown below:



All certificates issued will display for a selected building or all buildings depending on the available filters selected. The records can be easily exported to excel to report records.

Search Certificates Issued - 06/02/2025 10:45:40 AM										
Action		Export	Advanced							
Field	Condition	Value								
90 records displayed										
Building Number	Building Name	Date	Applicant Code	Applicant Name	Lot No.	Lot Account Code	Fee	Paid	Delivered By	
10000001	10000001	06/02/2025	02100001	10000001	1	02100001	150.00	Printed	Enailed	
10000002	10000002	06/02/2025	02100002	10000002	1	02100002	150.00	Printed	Enailed	
10000003	10000003	06/02/2025	02100003	10000003	1	02100003	150.00	Printed	Enailed	
10000004	10000004	06/02/2025	02100004	10000004	1	02100004	150.00	Printed	Enailed	
10000005	10000005	06/02/2025	02100005	10000005	1	02100005	150.00	Printed	Enailed	
10000006	10000006	06/02/2025	02100006	10000006	1	02100006	150.00	Printed	Enailed	
10000007	10000007	06/02/2025	02100007	10000007	1	02100007	150.00	Printed	Enailed	
10000008	10000008	06/02/2025	02100008	10000008	1	02100008	150.00	Printed	Enailed	
10000009	10000009	06/02/2025	02100009	10000009	1	02100009	150.00	Printed	Enailed	
10000010	10000010	06/02/2025	02100010	10000010	1	02100010	150.00	Printed	Enailed	
10000011	10000011	06/02/2025	02100011	10000011	1	02100011	150.00	Printed	Enailed	
10000012	10000012	06/02/2025	02100012	10000012	1	02100012	150.00	Printed	Enailed	
10000013	10000013	06/02/2025	02100013	10000013	1	02100013	150.00	Printed	Enailed	
10000014	10000014	06/02/2025	02100014	10000014	1	02100014	150.00	Printed	Enailed	
10000015	10000015	06/02/2025	02100015	10000015	1	02100015	150.00	Printed	Enailed	
10000016	10000016	06/02/2025	02100016	10000016	1	02100016	150.00	Printed	Enailed	
10000017	10000017	06/02/2025	02100017	10000017	1	02100017	150.00	Printed	Enailed	
10000018	10000018	06/02/2025	02100018	10000018	1	02100018	150.00	Printed	Enailed	
10000019	10000019	06/02/2025	02100019	10000019	1	02100019	150.00	Printed	Enailed	
10000020	10000020	06/02/2025	02100020	10000020	1	02100020	150.00	Printed	Enailed	
10000021	10000021	06/02/2025	02100021	10000021	1	02100021	150.00	Printed	Enailed	
10000022	10000022	06/02/2025	02100022	10000022	1	02100022	150.00	Printed	Enailed	
10000023	10000023	06/02/2025	02100023	10000023	1	02100023	150.00	Printed	Enailed	
10000024	10000024	06/02/2025	02100024	10000024	1	02100024	150.00	Printed	Enailed	
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10000029	10000029	06/02/2025	02100029	10000029	1	02100029	150.00	Printed	Enailed	
10000030	10000030	06/02/2025	02100030	10000030	1	02100030	150.00	Printed	Enailed	
10000031	10000031	06/02/2025	02100031	10000031	1	02100031	150.00	Printed	Enailed	
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10000035	10000035	06/02/2025	02100035	10000035	1	02100035	150.00	Printed	Enailed	
10000036	10000036	06/02/2025	02100036	10000036	1	02100036	150.00	Printed	Enailed	
10000037	10000037	06/02/2025	02100037	10000037	1	02100037	150.00	Printed	Enailed	
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10000039	10000039	06/02/2025	02100039	10000039	1	02100039	150.00	Printed	Enailed	
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10000099	10000099	06/02/2025	02100099	10000099	1	02100099	150.00	Printed	Enailed	
10000100	10000100	06/02/2025	02100100	10000100	1	02100100	150.00	Printed	Enailed	

What's Better

- Ledger Card – hidden transactions were part of the Running Balance; this has been resolved.
- DocMax – Deleting MRG group Stored Report documents in DocMax will now be prevented. Stored Reports allows delete.
- Process Bank Statements – The error message for processing banking for subgroups where there is an update code missing has been updated to be clearer as to which account does not have an update code.
- Creditor Maintenance – Creditor Details misalignment between hide and delete account has been resolved.
- Ledger Cards – Multi OC – Report Distribution Ledger Cards will now show the relevant Account Group above the line entry.
- Rationalisation – was creating unbalanced hidden transactions. This has now been resolved and all unbalanced transactions to different debtor accounts will no longer be hidden automatically.
- Creditor Invoices – Invoice flagged as 'Do not Pay' and payment 'dd External direct debit, periodic payment, internet transfer' selected. When fully paid invoices were reversed the invoice was being placed on Hold and appeared on Invoice Hub. This has been resolved.
- Levy Balance by Fund, Building Selection and Report Setup windows and Records selection – maximising and minimising specific windows was causing errors for some clients. This has been resolved.
- Notifications do not fire for abandoned or blocked tasks
- Building selector was occasionally crashing – this has been resolved