Release Notes – Version 5.6.150

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.   DocMax – New Search and Document Property Fields

Navigate to DocMax, click Advanced Search, and use the field selector to view / select these new fields.

1.1   Building Year Start and Building Year End Date

Building Year Start and Building Year End Date fields have been added to DocMax Advanced Search to allow searches to filter based on Building Year Start and Building Year End Dates.
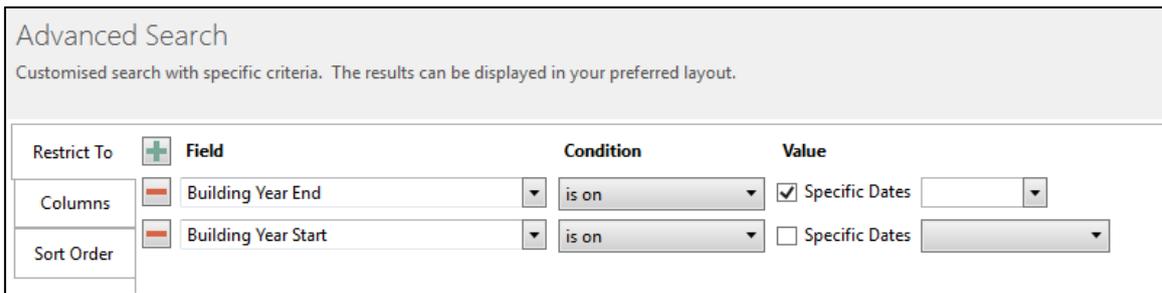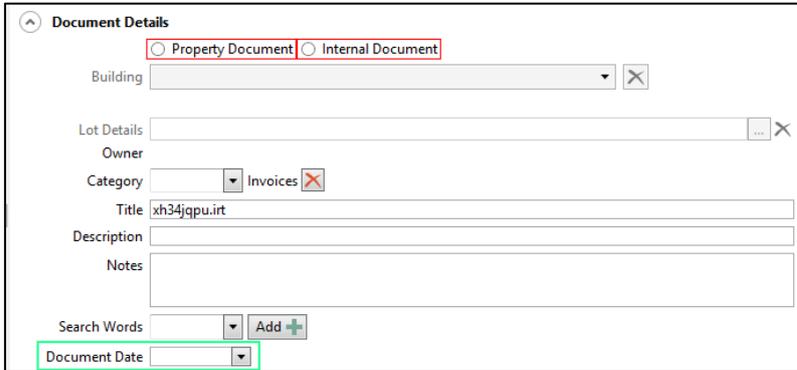

The fields can be added to a Saved Searches and Work Queues, added as columns, and set in Sort Order.
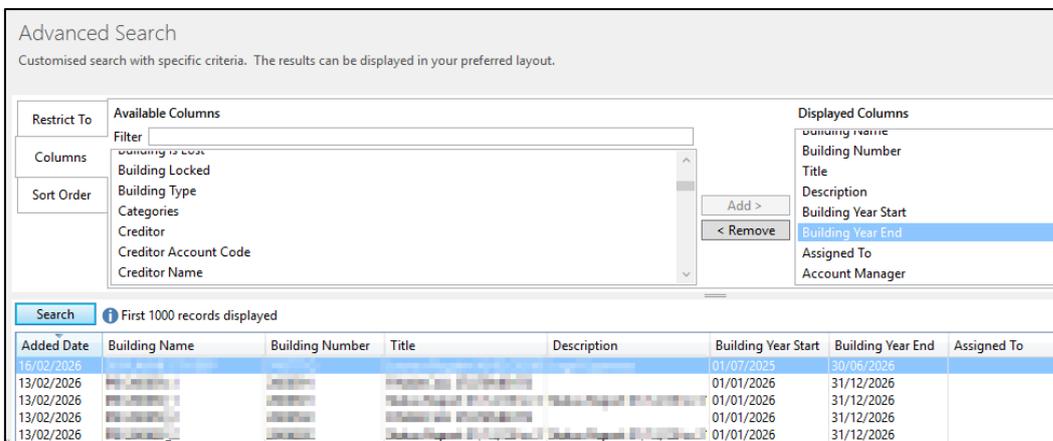
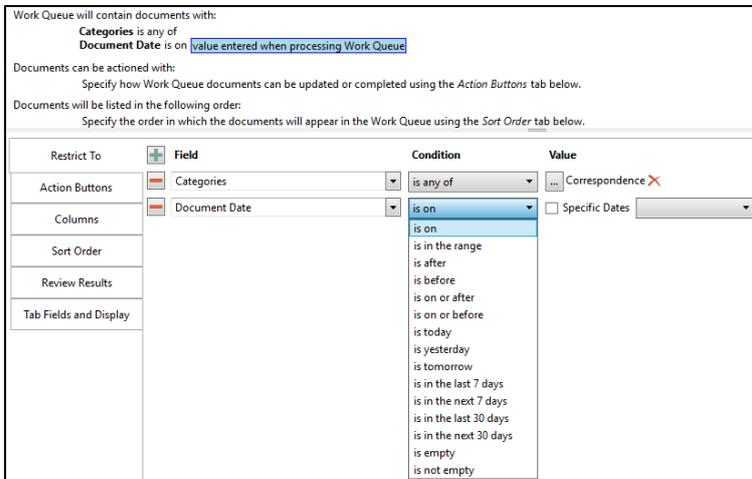**Please note –** Last AGM/Next AGM will not be supported at this time

1.2   Document Date

Document Date has been added as a document property field in the Document Details section.
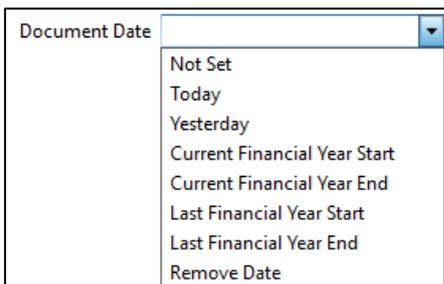

The field can be added to Advanced and Saved Searches and can be set in Profiles or Work Queue restrictions and Actions
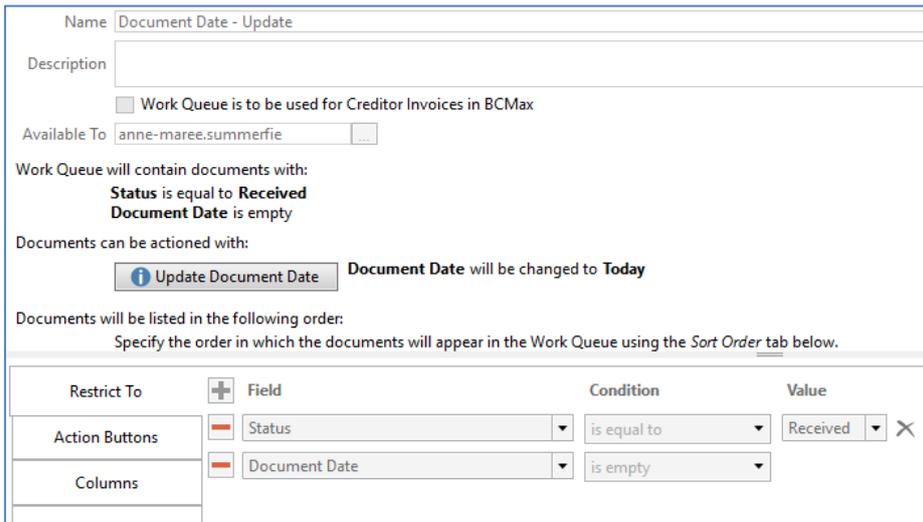
Search Conditions available:

Actions available to use in Work Queues or Profiles:

Example of a Work Queue to set Document Date as today.

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2. Building Certificate Information

Currently the Certificate Information column on the excel export via Building Information, is not being populated. This column has been removed.

New functionality has been introduced via Certificates, allowing clients to export Building Certificate information to excel.
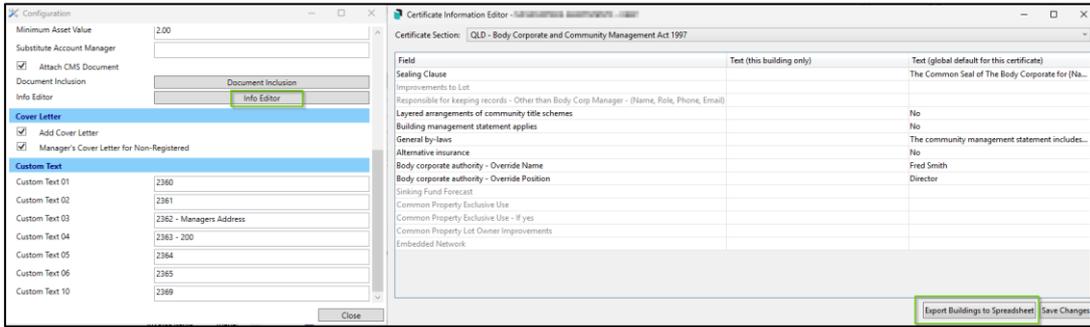
1. Navigate to Certificates

2. Select Configuration Cog
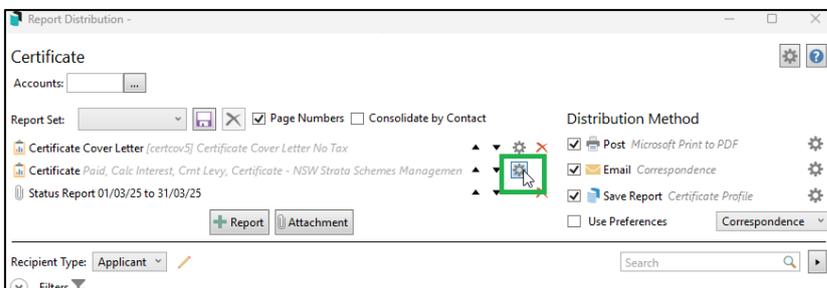
3. Select Recipients
4. Select Info Editor
5. Enter Text required on Certificate
6. Select 'Export To Buildings Spreadsheet.'

7. Select building/s

8. Data will be exported to Excel.

3. Label Printing

3.1 Label Printing Menu Item

Label printing is currently being phased out. If any of the following menu options are selected, a message has been introduced to obtain feedback, and understand client needs as why Label menu options are still needed.

Labels can also be managed via merge letters more efficiently, keep an eye out for the March training newsletter which will include a session on using merge letters & exporting recipients' details for external mail houses.
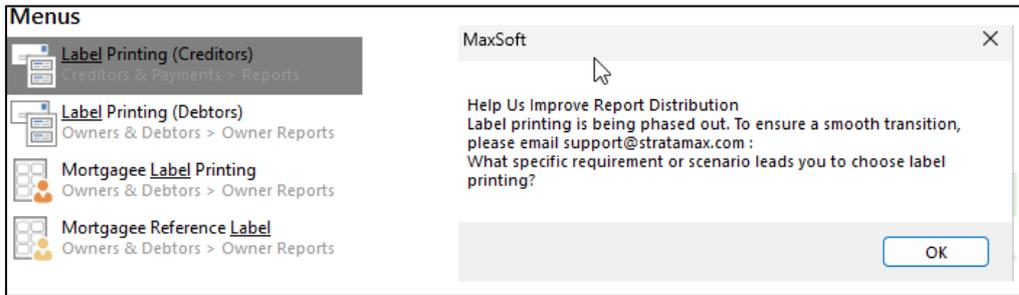
3.2   Label Merge Data Export – Report Distribution

To facilitate the removal of the Label Printing module, the merge data export has been moved to Report Distribution,

Navigate to Merge Letters and right click the recipient list to see export options.
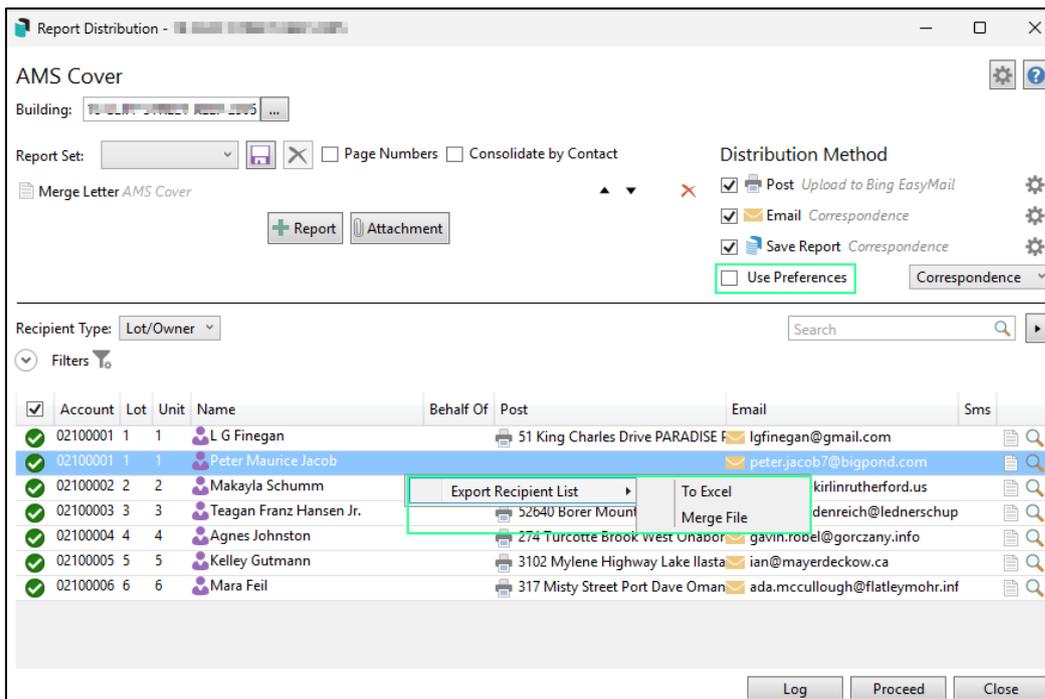
Recipient information can be exported to an Excel file or exported in the original .txt format.

3.2.1   Recipient Types

Data can be exported to Excel or Merge file for available recipient types by selecting the recipient type in Report Distribution. Select the required recipient type prior to right clicking the list and exporting to export for the selected type.
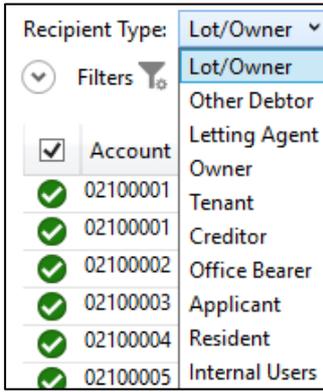
3.2.2   Export to Excel

1. Set the Required Recipient type.
2. Untick Use Preferences
3. Right click the recipient list
4. Hover mouse over Export Recipient List to pop out the options.
5. Click To Excel

The full list will be exported to Excel.

Account (	Lot	Unit	Address Title 1	Address Title 2	On Behalf Of 1	On Behalf Of 2	Address Line 1	Address Line 2	Address Line 3	Email Addresses
02100001	1	1	L G Finegan				51 King Charles Drive	PARADISE POINT QLD		lgfinegan@gmail.com
02100001	1	1	Peter Maurice Jacob							peter.jacob7@bigpond.com
02100002	2	2	Makayla Schumm				6266 Camylle Oval	Jeradton	Mongolia	caterina@kirlinrutherford.us
02100003	3	3	Teagan Franz Hansen J				52640 Borer Mountain	Andresberg	Turkey	jeanie_heidenreich@lednerschuppe.biz
02100004	4	4	Agnes Johnston				274 Turcotte Brook	West Onaborough	Saint Vincent and the C	gavin.robel@gorczany.info
02100005	5	5	Kelley Gutmann				3102 Mylene Highway	Lake Ilastad	Gambia	ian@mayerdeckow.ca
02100006	6	6	Mara Feil				317 Misty Street	Port Dave	Oman	ada.mccullough@flatleymohr.info

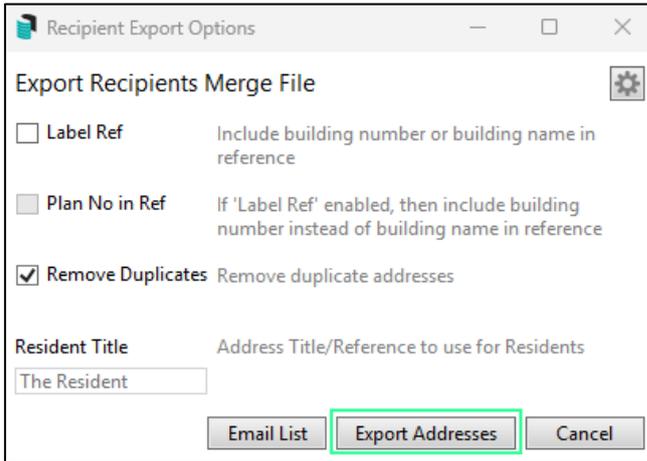### 3.2.3   Export to Merge Data file.

1. Set the Required Recipient type.
2. Untick Use Preferences
3. Right click the recipient list
4. Hover mouse over Export Recipient List to pop out the options.
5. Click Merge File
6. Click Export Addresses

Save file dialogue will open, and file can be saved to the desired location in .txt format.

3.2.1   Export Email List

1. Set the Required Recipient type.
2. Untick Use Preferences
3. Right click the recipient list
4. Hover mouse over Export Recipient List to pop out the options.
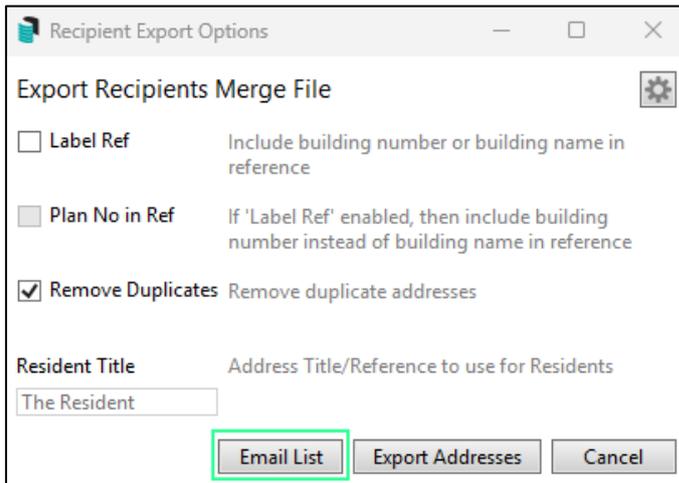5. Click Merge File
6. Click Export Addresses
7. Click Email List

Save file dialogue will open, and file can be saved to the desired location in .txt format.

```
"1-1-1" <alena.pfannerstill@marquardt.us>
"1-1-1" <developer@gmail.com>
"2-2-2" <123letme@testing.com>
"3-3-3" <herminia_farrell@kuhlman.name>
"4-4-4" <john@wehneroconnell.com>
"4-4-4" <othrep@email.com>
"5-5-5" <omer@bailey.co.uk>
"5-5-5" <sarai_nitzsche@bosco.biz>
"6-6-6" <samir@romagueraerdman.biz>
"7-7-7" <toby@nolan.com>
"8-8-8" <terrance_breitenberg@bartolettiherman.info>
"8-8-8" <eddie@goodwinhills.biz>
```

3.2.2   Recipients Export Options screen Configuration

The Recipients Export Options screen includes options for data exported to merge files.

- Tick Label Ref to include Building Name
- Tick Label Ref and Plan No in Ref to include Building Number instead of Building Name.

Note: Label Ref must be ticked if Plan No in Ref is ticked. If Label Ref is not ticked, Plan No in Ref will be disabled.

- Tick Remove Duplications to remove recipients that are duplicated.
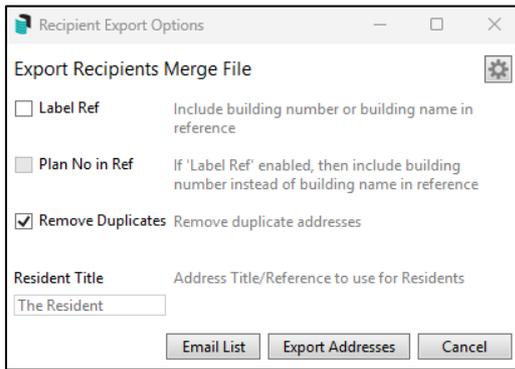
- If Recipient type is set to Resident, the Resident Title for the export can be changed for once off exports by clicking into the text field under Resident Title and adding the required title.
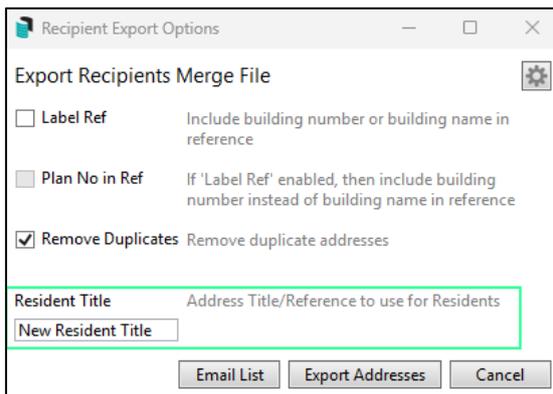
**Please Note -** This will be used as once off title and will not be retained after export.

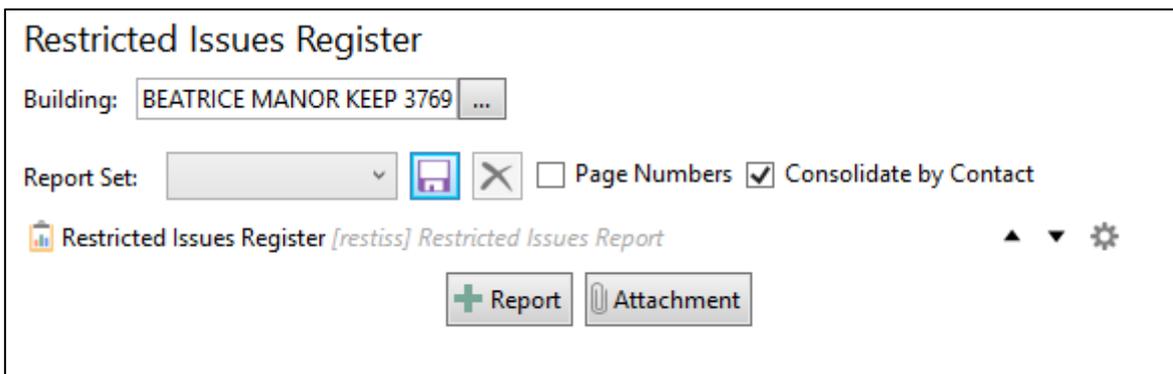### 3.2.3   Other Configurations

In the Recipient Export Options screen, click the configuration cog to see other configuration settings. Configuration can be set here for the following:

- Global and local Resident titles – these will be retained.
- Setting for Email list format
- Setting to Exclude Unresolved Returned Mail Addresses.
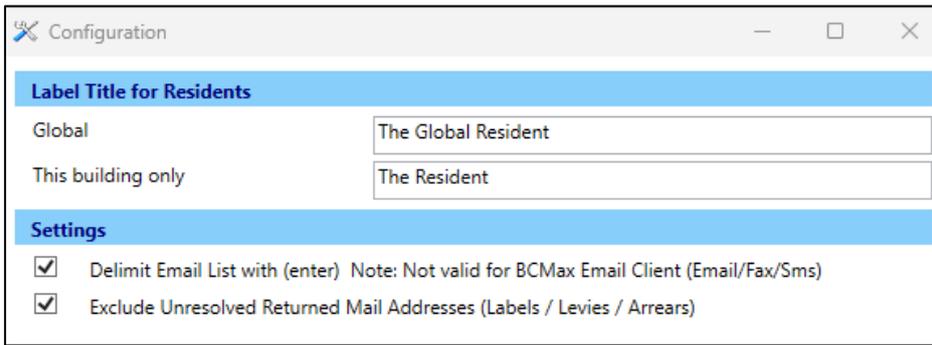
4.   Restricted Issues Report

The Restricted Issues Report will now open in Report Distribution mode. To see this change navigate to Restricted Issues and click Report, this will open Report Distribution with the Restricted Issues Template set.

Click the configuration cog to set whether Revoked issues should be included in the report.
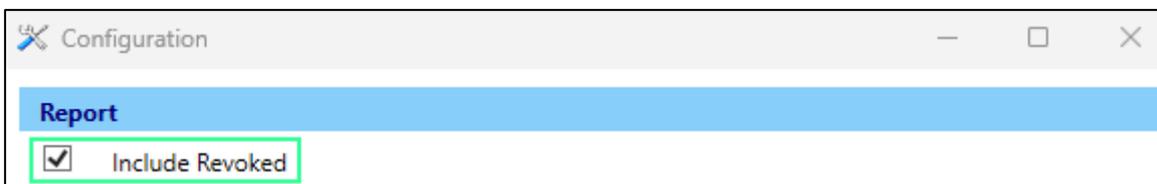
Click Proceed to generate the report to preview and email/print/ send to DocMax as per Report Distribution settings.

```
Page:  1          RESTRICTED ISSUES REGISTER              18 Feb 2026
                     BUILDING FORMAT PLAN NO. 2774

                            636 Weber Trail
                          North Theodorahaven
                            Faroe Islands

Restricted Issue No.   00000001   Meeting Type   AGM      18/02/26   Revoked   18/02/26
```
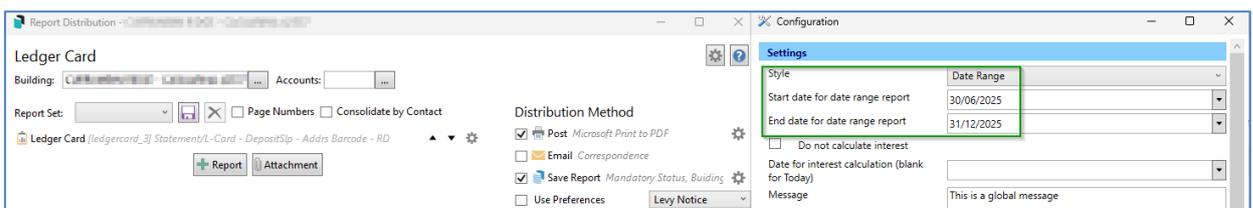
5. Ledger Card – Report Distribution

The Ledger Card now includes new date range options, enabling clients to generate reports for specific periods.

When generating the Ledger Card, configuration Style must be set to Date Range and note that when the date range is entered, the dates are temporary and will not be saved.

1. Navigate to Preview Features and select Ledger Card to use Report Distribution
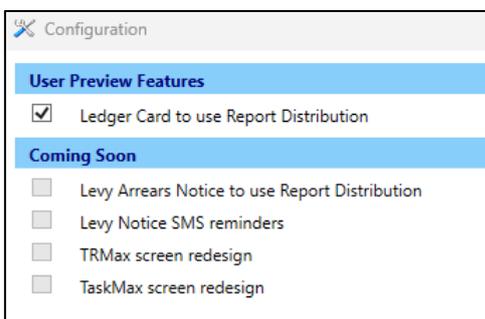
2. Select Ledger Card from the menu
3. Report Distribution, select Configuration Cog
4. Enter or select dates – new fields – 'Start date for date range report' and End date for date range report'

Ledger card is generated within the date range entered

6.   Edit Account Summary Setup

6.1   Edit Account Summary Setup – Financial Statements

The Edit Account Summary List screen has been refreshed. Navigate to Financial Statements / Options / Edit Account Summary Setup to see the new interface.

- Click the ➕ icon to add range fields. Click the ❌ to remove a set of ranges.
- Click the Account selector to set account range start and finish values.
- Account ranges can be modified for all buildings or just the selected building.
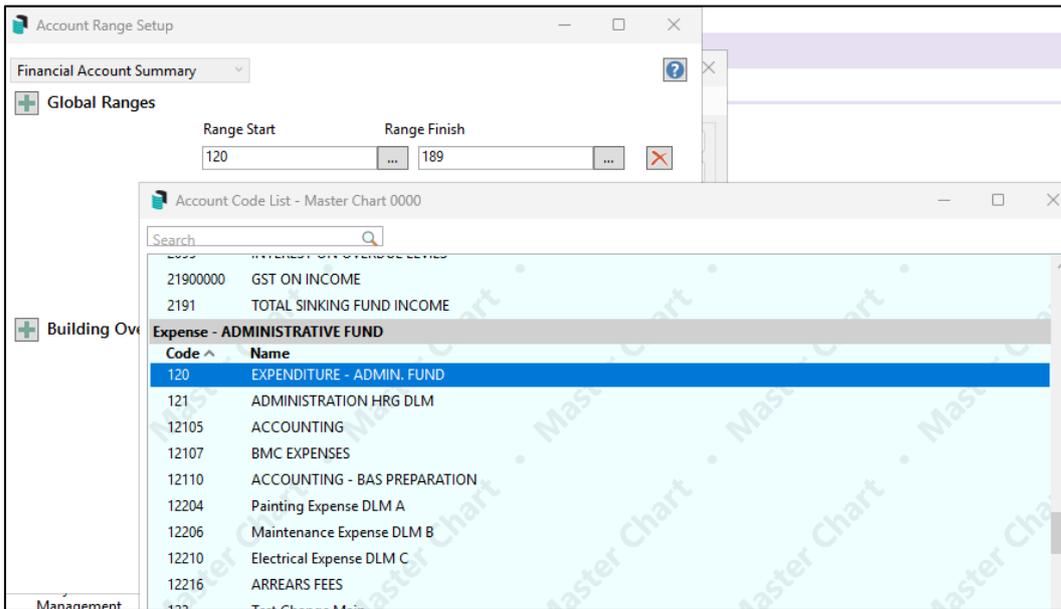
Note: Cash Flow Summary and Financial Account Summary Balance Sheet options are currently not available but will be added in upcoming releases.

6.2 Edit Account Summary Setup – Report Distribution

The Account Summary setup can now be edited through Report Distribution where the Account Summary Report has been selected.

1. Navigate to Merge Letters (for example)
2. Untick Merge Letters
3. Search and select Account Summary
4. Click the Configuration cog beside the report
5. Click Account Summary Setup to open the Account Summary Setup screen.
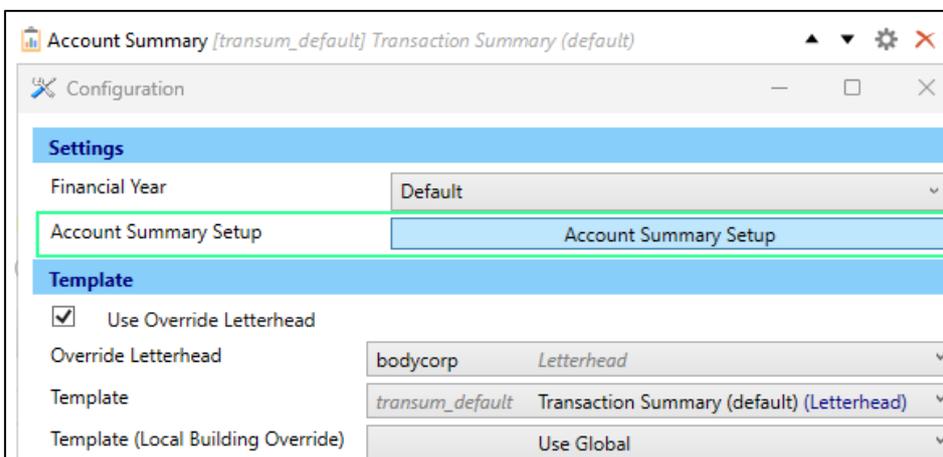
What's Better

- API – The Letting Agent, Nominee and Tenant contact IDs can now be retrieved from the relevant Endpoints.
- Invoice Hub Submissions – Building last uploaded date was not formatted correctly. This has been resolved.
- Levy Management - Levy Reversal was incorrectly hiding opening balances. This has been corrected.
- Report Distribution - Printing reports that have a deposit slip set for pre-printed paper will now be support in Reports Distribution. Eg Levy Notice Distribution and Ledger Cards.
- Receipts Report – was reporting more accounts than selected. This has been resolved.
- Process Bank Statements - Changes have been made to speed up scrolling and prevent errors in Process Bank Statements screen.
- GLMax Invoice Printing - Invoice Printing will now honour configuration setting to include CTS number and type in the invoice template(s) when printing Management Fees and recoveries invoices.
- Report Distribution -Marina Levy Notice - ABN and Tax Invoice stamp will now output on Levy Notice
- Search Contracts - Year Code search error has been corrected.
- Invoice Hub Creditor Override – when approving Creditor Override invoices, second layer approval is no longer required.
- Levy Management – Summary calculations included prior year levies, this has resolved.
- Ledger Card (Report Distribution) - When the Interest Calculation Date is left blank, todays date will now be entered for unposted interest.
- Utility Billing - The Activity Report has been removed from Utility Billing.
- Owner Ledger Card – Levy Opening balance transactions were shown in error and have now been corrected to report the correct balances to match the local transactions and Ledger Card.
- DocMax - Previewer error when deleting a large number of documents was being generated.
- Creditor Invoices – Viewing a document that had not been saved yet was causing issues and crashing, this has now been resolved.
- ACT Section 119 will now include the lot number as well as the unit number on the first page.
- Report Distribution – The "Print Job per Building" that was accessible via Printer Setup from an old report has now been moved to Report Distribution/Configuration and renamed to Report Distribution – Print Job Per Building.