

Release Notes – Version 5.6.151

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



What's New.....	3
1. Building Health Report.....	3
1.1 <i>Building Health Report Security.....</i>	<i>5</i>
2. Search Enhancement – Advanced Button.....	5
3. DocMax Enhancements.....	6
3.1 <i>Work Queue Action Buttons Re-ordering.....</i>	<i>6</i>
3.2 <i>Email Documents for Multiple Buildings.....</i>	<i>6</i>
3.3 <i>Search Restrictions – Selection Controls.....</i>	<i>7</i>
4. ACT Rental Certificate – Info Editor Terminology.....	7
5. Report Distribution – Combined Address Title.....	8
What's Better.....	9

What's New

1. Building Health Report

The Building Health Report will now be available in BCMax and can be accessed by searching and selecting 'Building Health.' New fields are available for selection which includes Term Deposit information & GST registered; GST registered can be used along with the Annual Levies fields to monitor GST registration requirements based on ATO thresholds.

Buildings highlighted red are potentially at financial risk based on whether 012 Bank Balance plus Total Investment Accounts is less than Creditors Balance Owed plus Insurance Outstanding.

Only Investment accounts entered in BCMax Bank Account Setup will be included in Investment Account Balance for this release.

Building Number	Building Name	Account Manager	Bank Balance (012)	Bank Balance (at bank)	Investment Bank Balance	Creditors Balance Owed	Insurance Outstanding	Insura
			0.00		0.00	5,600.00	0.00	0.00
			-1,700.00		2,616.29	36,135.60	0.00	0.00
			1,000.00		0.00	13,422.43	0.00	14811.00
			850.00		0.00	5,569.00	0.00	
			-4,148.00		1,099.99	11,200.00	0.00	0.00
			397.30	397.30	-1,777.82	0.00	0.00	0.00
			0.00		0.10	34,000.00	0.00	0.00
			0.00		0.90	25.00	0.00	0.00
			0.00		0.00	0.00	0.00	
			950.43		31,725.80	993.00	0.00	5,859.10
			360,095.30		-2,901.85	2,000.00	0.00	
			2,750.00		-220.91	1,349.00	0.00	0.00
			0.00		0.00	0.00	0.00	
			5,472.30	5,472.30	0.00	222.00	763.00	\$4,637.00
			65,037.37		0.00	37.00	0.00	13371.00
			0.00		0.00	0.00	0.00	
			193,577.25	199,291.33	1,000,000.00	31,508.22	0.00	12638.00
			60,763.99	60,949.20	0.00	90.91	0.00	19,247.00
			1,560.00		0.00	400.00	0.00	0.00
			170,098.37		-2,438.66	57,131.73	0.00	\$1,889.00
			297,960.92	297,960.92	-14,930.34	17,642.34	0.00	11,174.00
			75,811.40		8.35	11,690.50	0.00	\$23.45
			6,484.46	6,484.46	-786.12	395.00	0.00	
			135,370.18		1,040.82	0.00	0.00	817.95
			106,443.12		0.00	2,160.00	0.00	
			11,407.40		570,953.11	6,799.56	6,387.00	\$2,640.00
			13,646.56	13,646.56	0.00	0.00	0.00	222.00
			0.00		0.00	0.00	0.00	

The report will load with the following fields as default:

Building Number

Next Levy Value

Building Name	Total Arrears 30 Days
Account Manager	Total Arrears 60 Days
Bank Balance (012)	Arrears 30 Days % of Last Year
Bank Balance (at bank)	Arrears 60 Days % of Last Year
Investment Bank Balance	Arrears 30 Days % of Budget
Creditors Balance Owed	Arrears 60 Days % of Budget
Insurance Outstanding	Lots O/S 30 Days
Insurance Premium 901	Lots O/S 60 Days
Insurance Due Date 901	Lots O/S 90 Days
Annual Levies Last Year	Lots O/S > 90 Days
Annual Levies This Year Budget	Calculated Available Balance
Last Levy Date	Number of Lots
Next Levy Date	Building Current Year Start
	Building Current Year End

Additional fields that can be added are:

Account Manager	Management Office
Building Locked	Next TD Amount
Building Long Name	Next TD Maturity Date
Calculated Balance Below Zero	Number of Lots
Current Building	Taken On Date
GST Registered	Regulatory Module
Investment Bank Balance	State
Legislation	

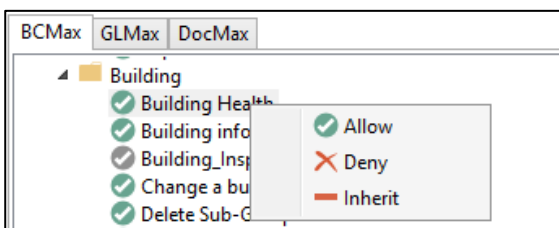
This report can be modified and saved as a Saved Search and added as a Dashboard item. The report can also be exported to Excel.

Note: The report does not support Periodic Payments at present.

1.1 Building Health Report Security

A new security permission has been added to manage access to the Building Health Report.

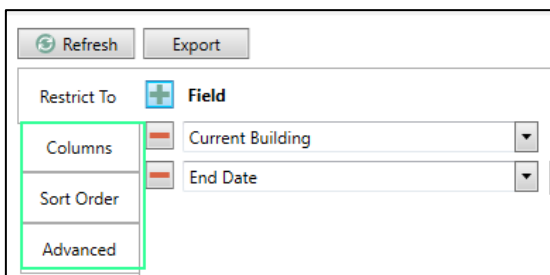
Navigate to Security Setup, right click the user or user group to modify and click Edit Permissions. Search for Building Health and set permissions as required.



Note: Permissions will not be set on upgrade.

2. Search Enhancement – Advanced Button

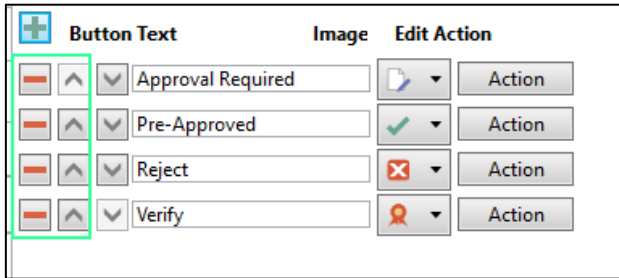
The Advanced Button has been removed from the top ribbon, and the Columns and Sort Order tabs will be available on the left under the restrict to Tab



3. DocMax Enhancements

3.1 Work Queue Action Buttons Re-ordering

Work Queue Action buttons can now be re-ordered by clicking up / down arrows when work queue is open in Edit mode.

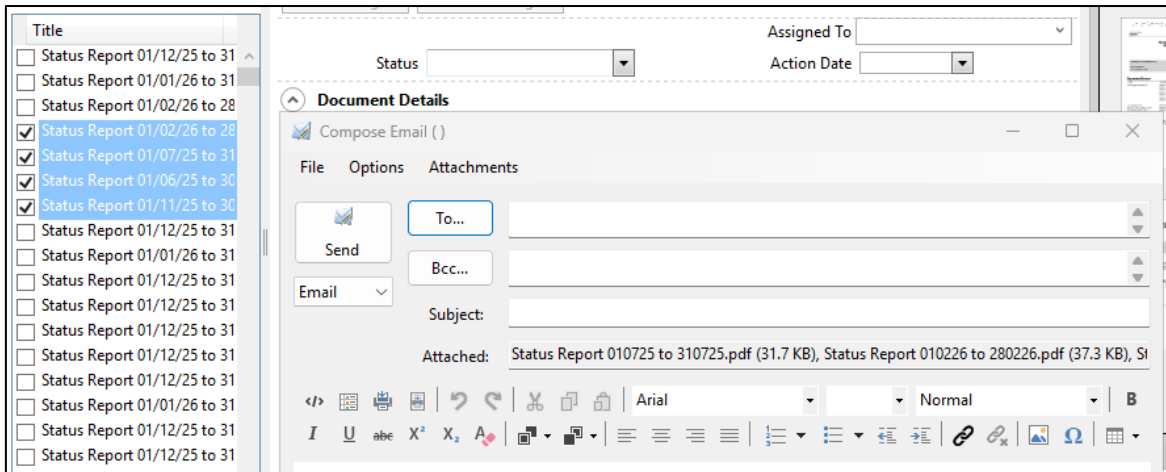


3.2 Email Documents for Multiple Buildings

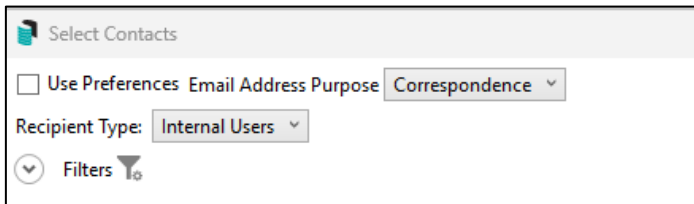
Email documents for multiple buildings will now be supported in DocMax.

To email for multiple buildings, tag the documents to be email and click Email in ribbon or right click and select email.

The Email Compose screen will open.



Add recipients manually or click the 'To' button to open a Building list and select a building. The recipient list for the selected building will open where recipients including Internal Users can be selected.



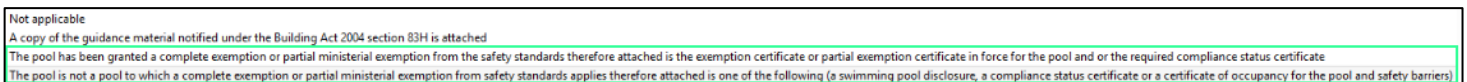
3.3 Search Restrictions – Selection Controls

When entering search restrictions, some restrictions now use a different control

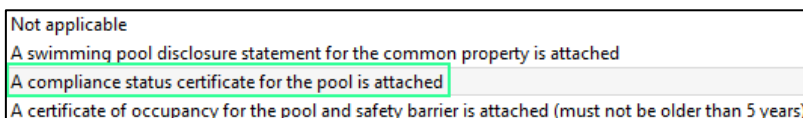
- Building number
- Account codes
- Some columns for Any / Not Any
- Some columns for Equal / Not Equal where a list is provided

4. ACT Rental Certificate – Info Editor Terminology

Certificate wording for Regulated swimming pool built before 1 May 2023 has been updated as per regulatory requirements to "The pool has been granted a complete exemption or partial ministerial exemption from the safety standards therefore attached is the exemption certificate or partial exemption certificate in force for the pool and or the required compliance status certificate" or "The pool is not a pool to which a complete exemption or partial ministerial exemption from safety standards applies therefore attached is one of the following (a swimming pool disclosure, a compliance status certificate or a certificate of occupancy for the pool and safety barriers)"



Certificate wording for Regulated swimming pool was built or substantially altered after May 2023 has been updated as per regulatory requirements to "A compliance status certificate for the pool is attached".



Navigate to Rental Certificates, Click the Configuration cog beside Certificate and click Info Editor. Click the text selection for fields Regulated swimming pool built before 1 May 2023 and Regulated swimming pool was built or substantially altered after May 2023 to review this change.

5. Report Distribution – Combined Address Title

Reports such as Ledger Cards and Merge Letters will now use Address Title 1 where populated for Roll accounts where there are multiple owners with split contacts. This will maintain consistency with Levy Notices which already uses the Address Title 1 field. This will apply to lots where split owners have the same email address or a different email address.

Ownership Details ?

Date of Receipt of Notice: Time: Acquired:

Car Space Number Storage Space Number Is Owner Occupied

Notes:

Use these names when dealing with the combined ownership:

(Combined Owner) Name

Reference Name Letter Title

Address Title (1) Address Title (2)

What's Better

- Change Code number – error was occurring when changing code to the same code. This has been resolved.
- DocMax date range – error was occurring when date range entered was extremely old. Validation messages have been added.
- Roll Non-Owner changes – updates to 'Receive Owner Correspondence' and 'Receive Owner Levy Notices' were not being saved. This has been resolved.
- Show Creditor History – Search GST 'is equal to' and 'is not equal' will now recognise GST amount that does not come to an even number of cents when divided by 11
- Search Bank Account – Building ABN Branch – Is not Empty – Is Empty error is no longer generating
- Organisational Searches – Is Current field will now apply to Dashboard search
- DocMax / SIE – Certificate Of Classification category will now be automatically added to DocMax when adding a document to Certificate of Classification in SIE to prevent crash if the category is missing in DocMax
- Bank Reconciliation Reverse Receipts – report was timing out when there were many receipts. This has been resolved
- DocMax Work Queues – appending a document will now remove the superseded document from the work queue
- DocMax – Custom Text Decimal field will now allow edit of figures after the decimal point
- DocMax Work Queue Administration – Work Queue lists will now populate more quickly where there are large number of queues.
- Searches – when printing a search and you have a number of restrictions the report information was overwritten and unreadable
- DocMax – Inactive creditor field is no longer selected in Document properties as it is included in the Account Selection dialogue. Inactive creditor field has now been removed from Profile forms
- Work Queues – Custom properties not set as a Tab Stop will now be hidden until More is selected but are showing
- Locked buildings (everything) – clients will not be able to view searches for Locked buildings (everything) by another user
- Prepare BAS – Validation now displays when Preparing BAS if changing tax code via BAS for a transaction linked to an income tax report
- Locked building (searches allowed) – can now view Search Meetings, Search Tasks and Search Contracts
- Report Distribution – the ability to tag multiple report configuration was removed, this has been resolved
- Insurance schedule – Broker address details were not populating correctly, this has been resolved

- DocMax Administration - Work Queues and Saved Searches. The summary of the search restrictions was not updating as the restrictions were entered
- Account Selection - when selecting from the master chart to add to the building in the account select dialog, if the creditor is already in the building under a different code it will now be greyed out and show the conflicting code