Release Notes – Version 5.6.154

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

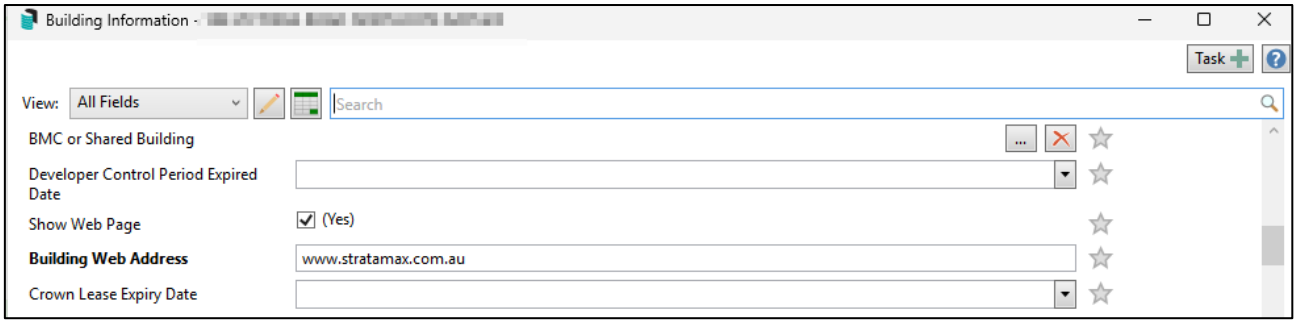
1. Levy Register – New Icon

Levy register is now available as a menu icon; users can now add this to desktop to streamline their reporting.

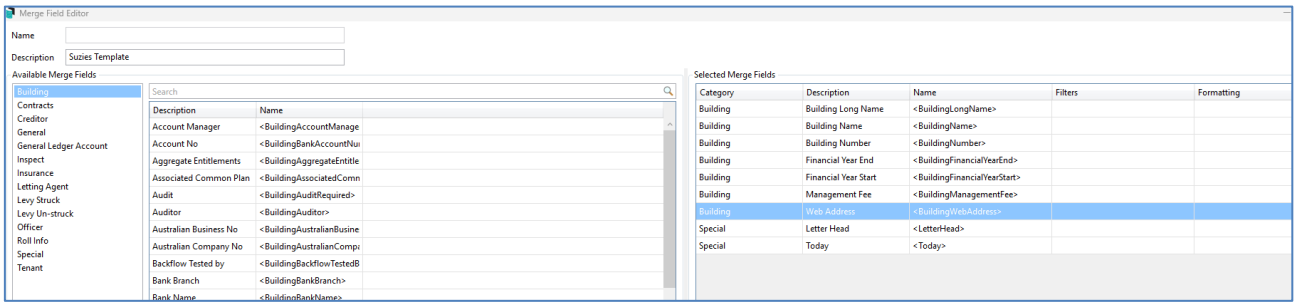
Please Note – The security around the Levy Register will remain the same, if access is granted to Levy/Notice/Reports then the user will have access to this Report option.

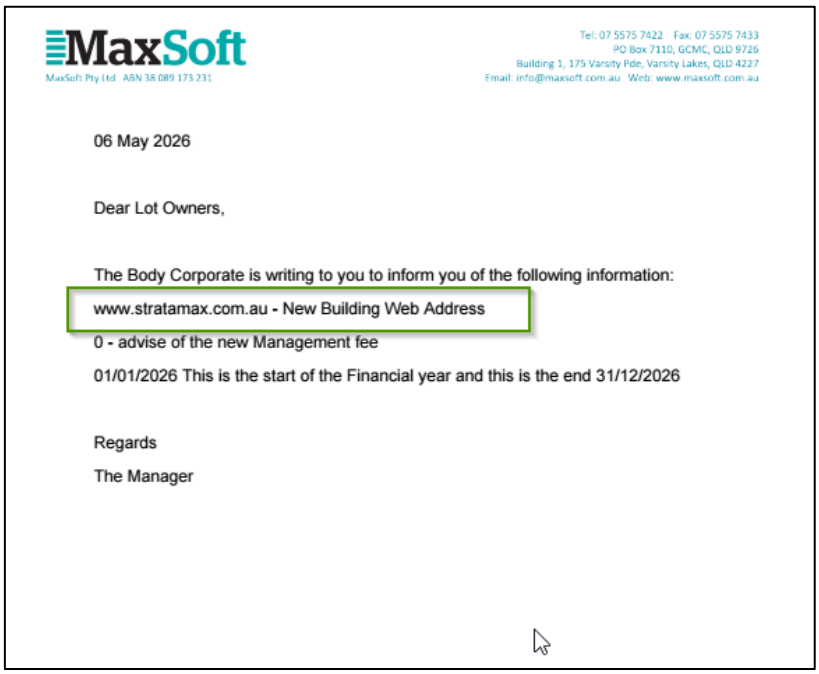
2. Merge Letters – Building Web Address

Clients can now insert the Building Web address located on the Building Information screen, into Merge Letters



1. Navigate to Merge Letters
2. From Merge Letter List select Fields
3. Locate and add <BuildingWebAddress> to template
4. Edit Template to insert <BuildingWebAddress> into Merge letter



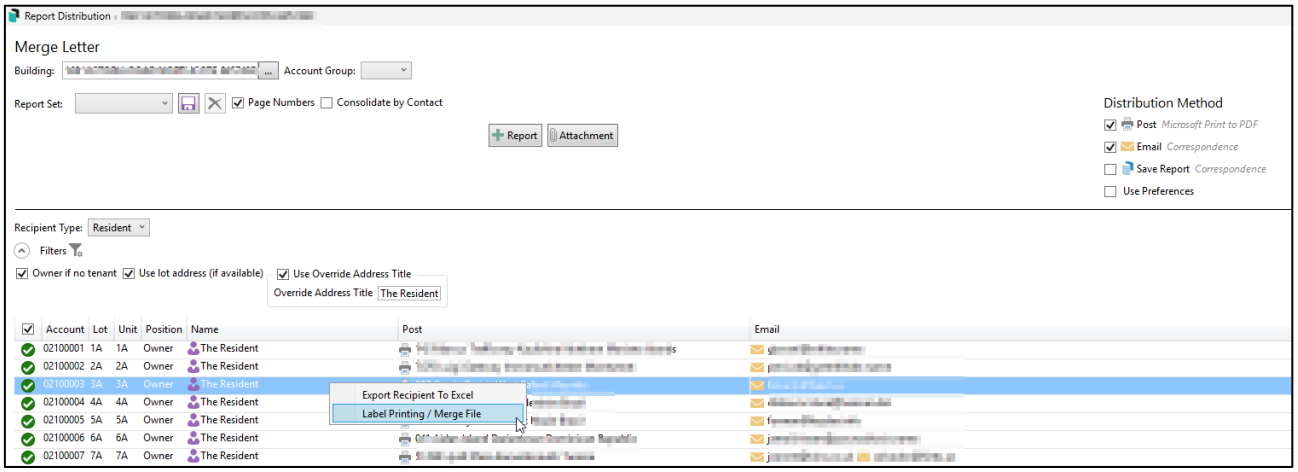


3. Report Distribution – Label printing

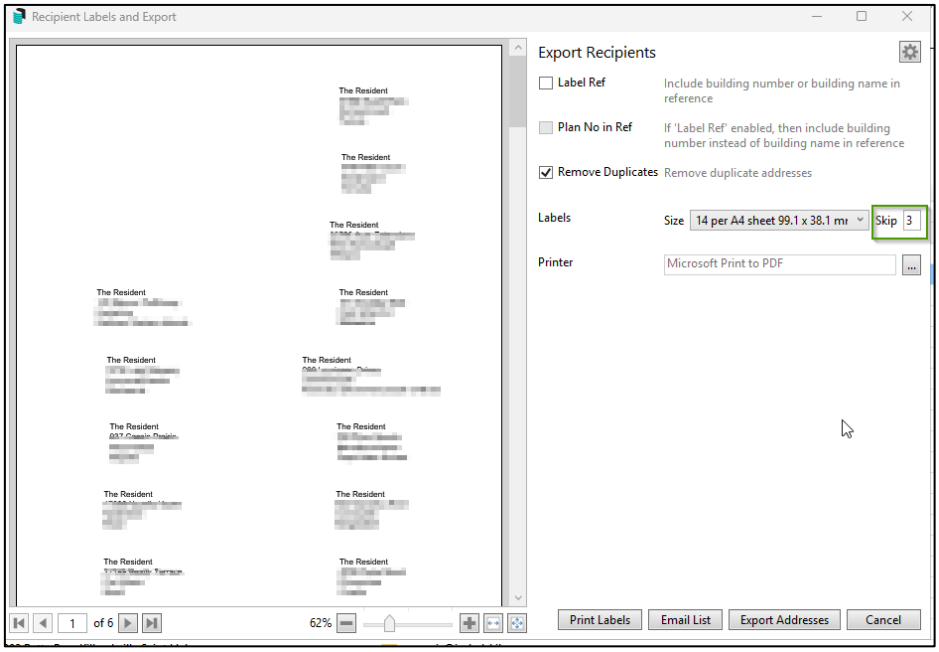
Labels can now be printed both Report Distribution and Current Label function. Report Distribution includes the following label-printing features:

- Override Address Title
- Removal of duplicates
- Ability to set at which label to start printing
- Export Address and Email lists
- Ability to set the 'The Resident' title

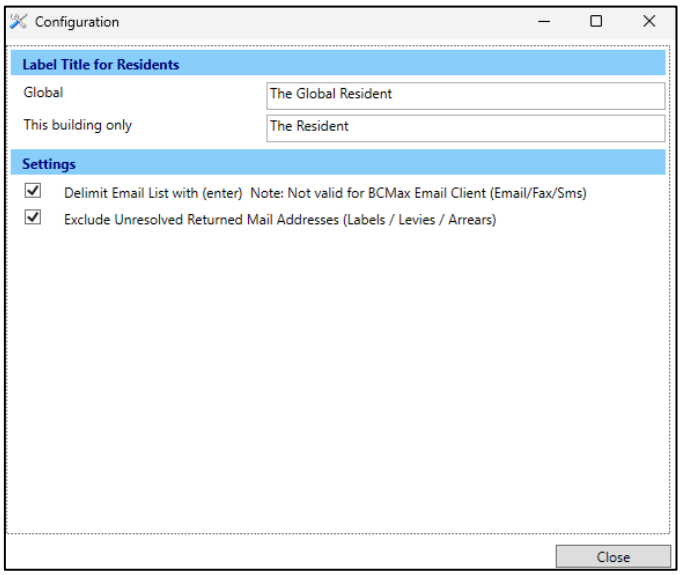
1. Navigate to Merge letters
2. Select Recipient Type
3. Right click and select Label Printing/Merge file



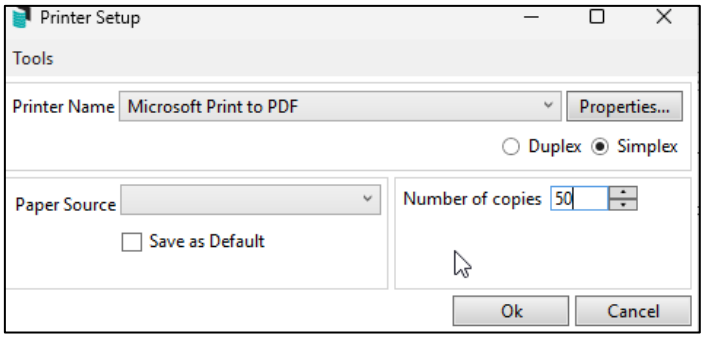
4. Enter number in Skip field to start printing at a specific label



5. Select Configuration to set 'The Resident' title



6. Select Printer menu for Printer setup

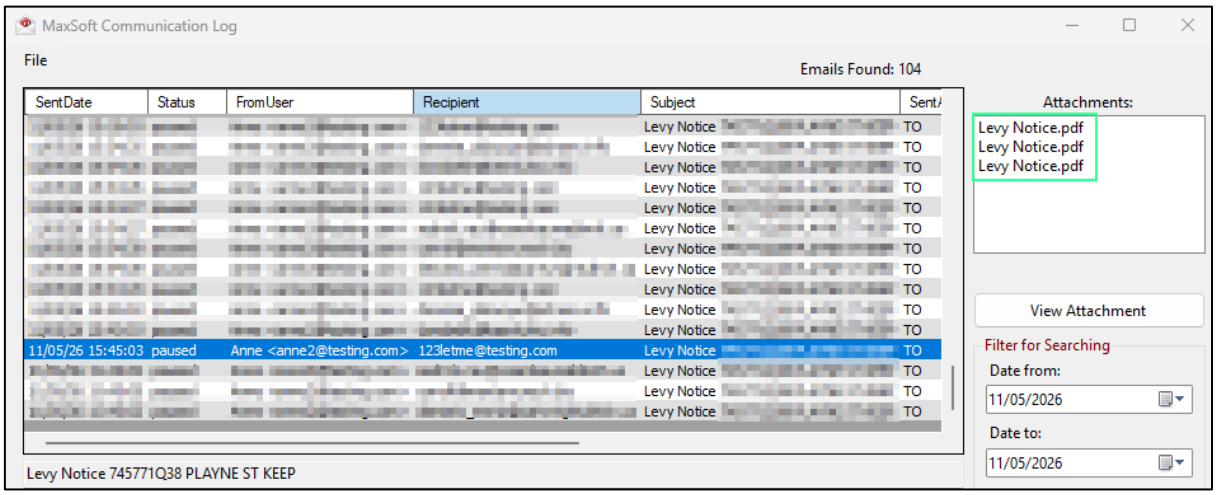


4. Report Distribution – Consolidate by Email options

4.1 Overview

This release introduces new **Consolidate by Email** options within **Report Distribution**. The enhancement allows reports and notices for multiple lots that share the same email address to be sent in **a single email with separate attachments**, improving communication efficiency and reducing duplicate emails.

For example, if an agent manages several lots in a building and notices are set to be emailed, Report Distribution can now be configured to send all notices in one email as separate attachments A record will be added to DocMax and the Roll for each account. This can be configured as default or as a one-off configuration.



This feature can be applied:

- As a **default configuration**
- As a **one-off (per use) configuration**

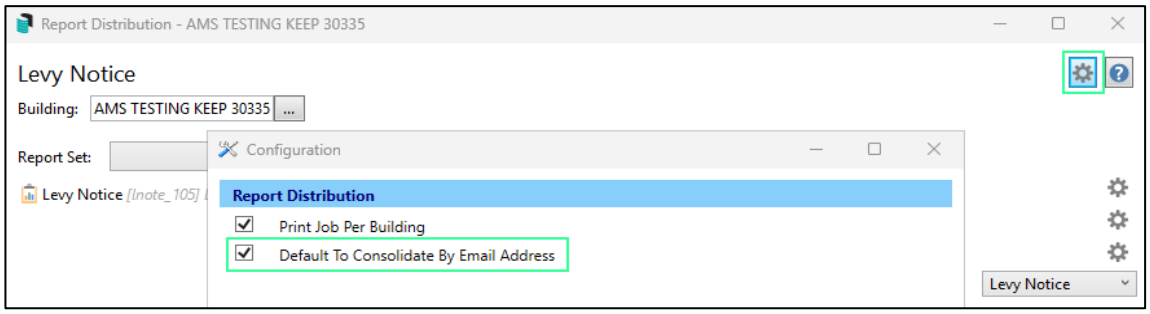
4.2 Configuration Options

4.2.1 Default to Consolidate by Email Address

A new configuration setting has been added to control consolidation behaviour by default.

Location:

- Navigate to:
  Levy Management > Reports > Distribute
- Click the Configuration cog icon



Behaviour:

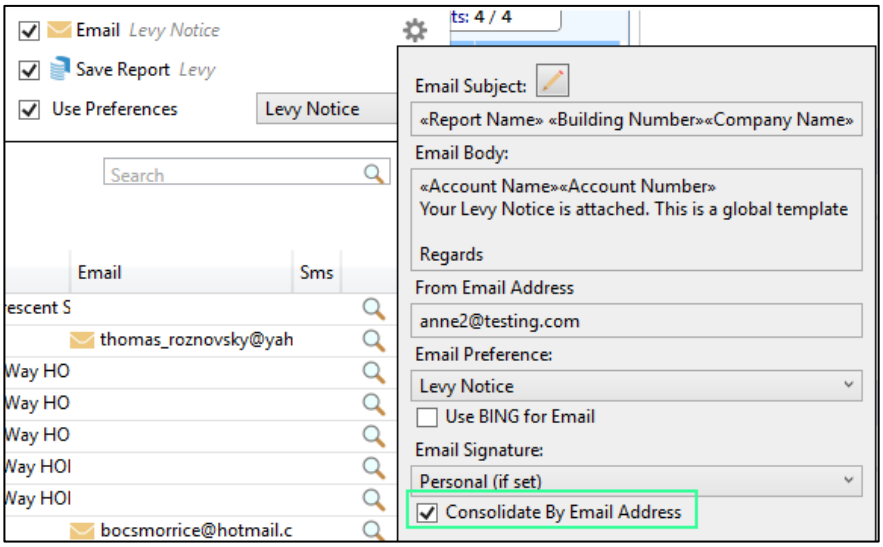
- When enabled, emails for multiple accounts sharing the same email address will be sent as one consolidated email with separate attachments by default.
- The Report Distribution screen must be closed and reopened for the setting to take effect.
- When set, this configuration applies across all Report Distribution screens.

4.2.2 Consolidate by Email Address (Per Use)

If the default setting is not enabled, users can apply consolidation on a per-use basis.

Location:

- Click the Email Template Configuration cog
- Setting is located at the bottom of the configuration screen



Behaviour:

- Sends all notices to the same email address in one email with separate attachments
- This setting is not persistent and must be configured each time the feature is required.

4.3 Important Notes and Dependencies

- If **Default to Consolidate by Email Address** is not enabled, the per-use setting will reset after each distribution.

- If **Consolidate by Contact** is enabled notices will be consolidated into **one combined document**, not multiple attachments.
- Consolidation behaviour applies only to **email distributions**.
- Setting this by default will set as default in all Report Distribution screens.
- Email Template Body: Only the content from the first notice email body will appear in the email body. For example, if levy notices for two lots are sent together, the details shown (such as merge fields) will come from the first lot in the report.
- Email Template Subject Line: Unique subject lines will be combined. We recommend not using merge fields in the subject, as this could make the subject too long and exceed email character limits.

It is recommended that email templates are reviewed if intending to use this setting.

5. Owner Info refresh – New Preview Option

We are excited to introduce a refreshed Owners Info module, now available to clients as a Preview Feature.

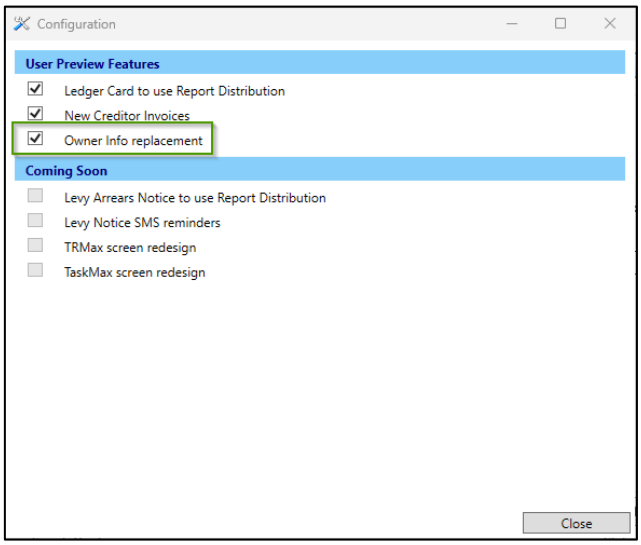
The module has been redesigned to enhance usability, improve clarity and deliver better overall performance. Key Improvements include:

- Modernised Interface – A clearer, more intuitive layout that makes it easier to view and manage owner details.
- Improved Navigation - Streamlined structure to help the user to quickly find and update information
- Enhanced Data Visibility – Better organisation of fields and report options along with delivery preferences of the contacts

5.1 Enabling the Owner Information Preview

The refreshed module is currently available via Preview Features. To enable:

1. Select your username in the bottom right-hand corner of BCMax
2. Navigate to Preview Features
3. Enable the Owner Info Replacement by ticking the box

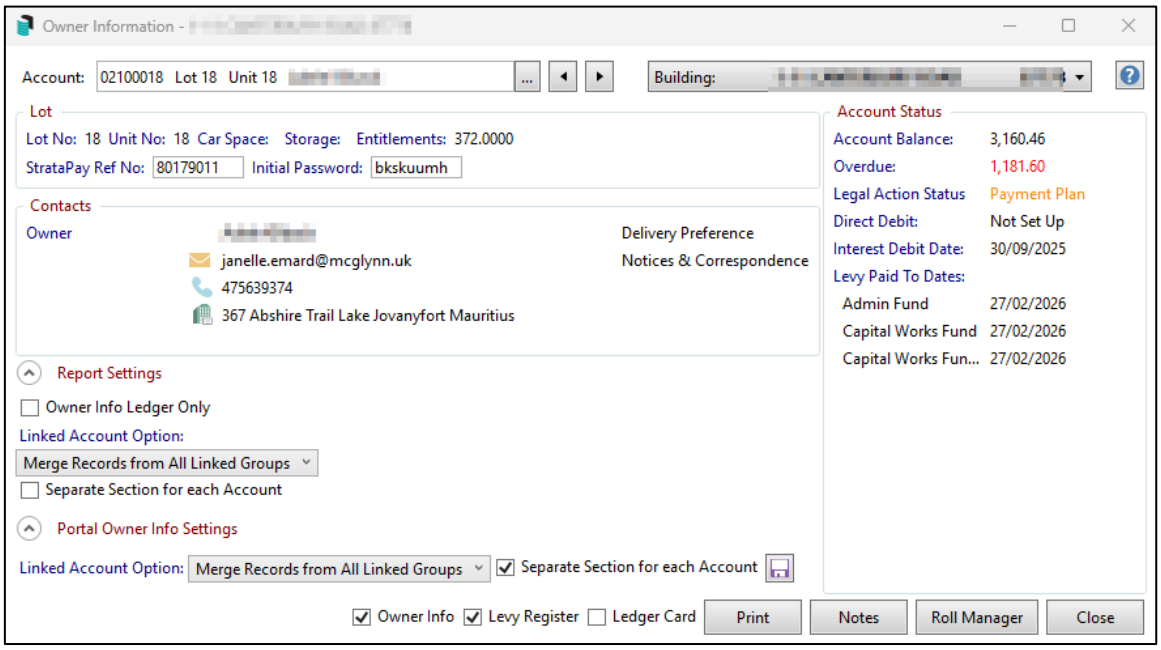


5.2 Using the Refreshed Owner Info module

Once the Preview feature is enabled, the updated Owner Information interface will automatically be displayed when accessing Owner Info.

The refreshed view consolidates all key information for the selected lot into a single page including:

- Lot details
- Contact information including Delivery preferences
- Account Status
- Report Settings, Portal Owner Configurations
- Access to Notes
- Access to Roll Manager
- Printing Options for key reports, including:
  - Owner Information
  - Levy Register
  - Ledger Card



Please Note: As this is a Preview release, some features may continue to evolve based on the user feedback. We encourage you to explore the refreshed module and share your feedback to help us refine the experience.

6. Bank Reconciliation Enhancements and Validation

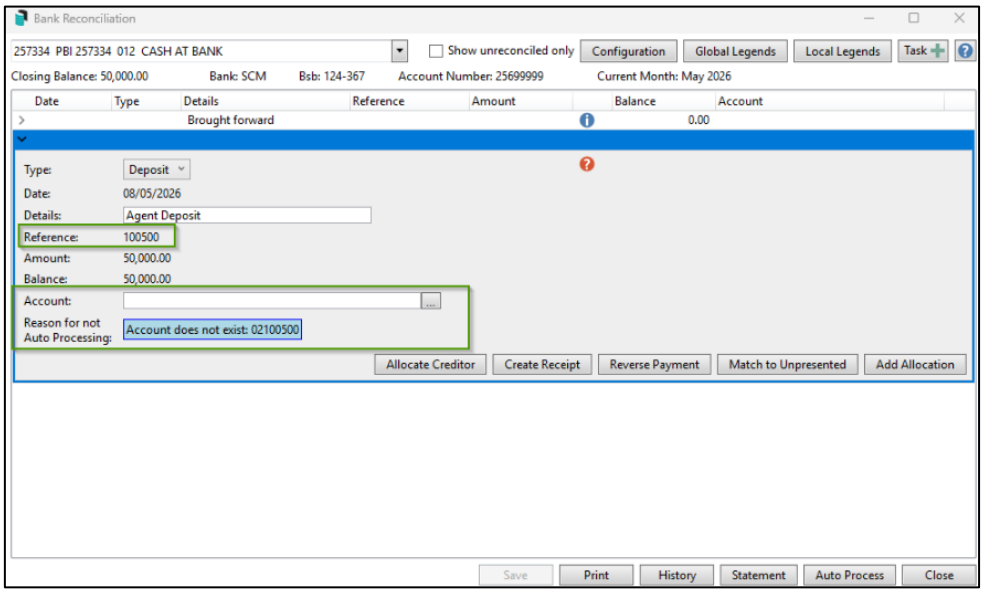
Enhancements have been introduced to improve accuracy and transparency during bank reconciliation processing.

When a transaction reference is invalid or cannot be matched, the system will no longer automatically populate the Account Code field and add it to the database. Instead, a validation message will be displayed to notify the user that the transaction could not be processed due to an unknown bank account reference.

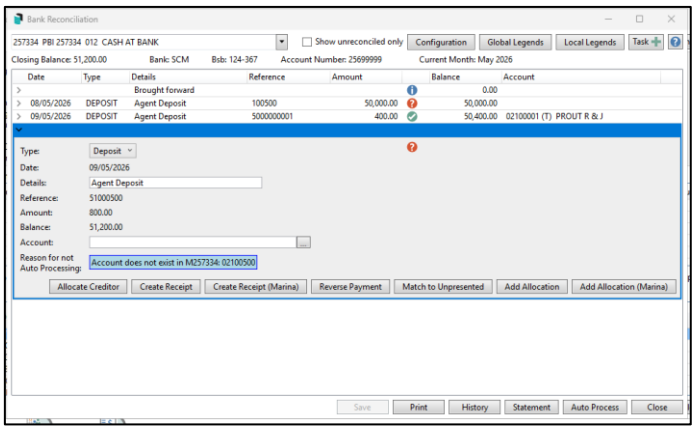
In addition, where the transaction reference may relate to a subgroup (for example, reference begins with a specific prefix such as "5") the system will provide an on-screen prompt indicating that the transaction may belong to a subgroup, assisting users in identifying and resolving the allocations correctly.

Examples include

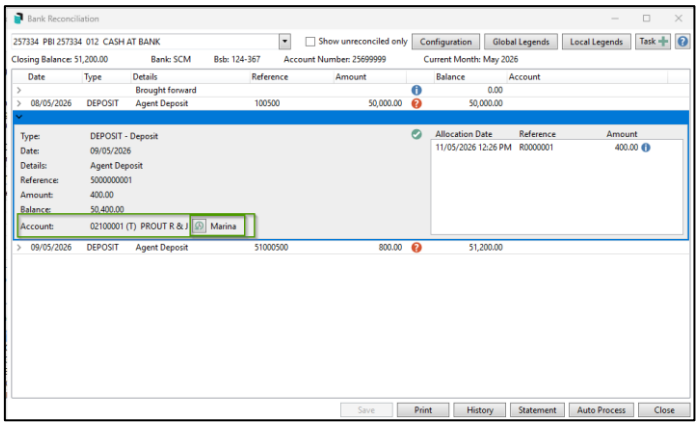
- A transaction with an unknown reference where no matching account is found



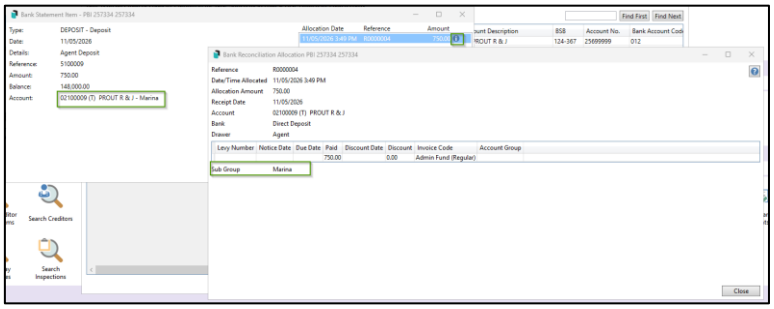
- A transaction with a reference that may correspond to a subgroup account



- A transaction that is automatically matched to the correct account as reference does match



Furthermore, the **Search Bank Statement History** module has been enhanced to display whether a transaction is associated with a subgroup within the detailed preview, providing improved visibility.



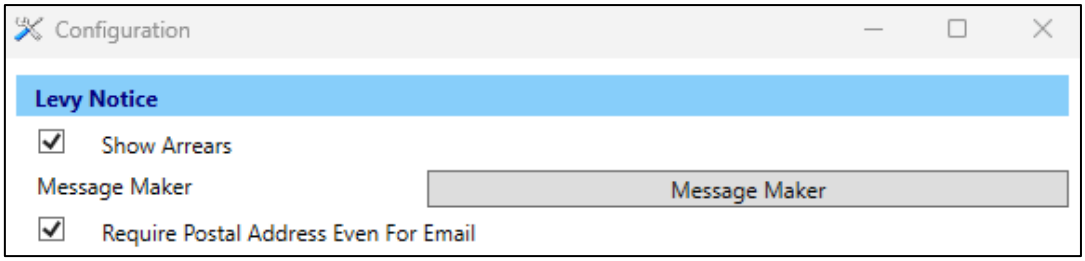
7. Levy Management - Message Maker

7.1 Overview

The Message Maker feature enables users to configure and manage Global and Local messages for Levy Management levy notices. These messages are used when issuing notices through Report Distribution.

7.2 Feature Description

Users can access the Message Maker module by navigating to Levy Management > Distribute > Configuration icon > Message Maker button.



Within this module, users can:

- Add, edit, or delete custom messages for Levy Management levy notices
- Set a message as **Active** by selecting the Star icon next to the message
- Deactivate a message by toggling off the Star icon

7.3 Functionality

- Supports both **Global** and **Local** message configuration
- Ensures only one active message is applied per context (via star selection)
- Messages will be included in generated notices when distributed through the reporting process

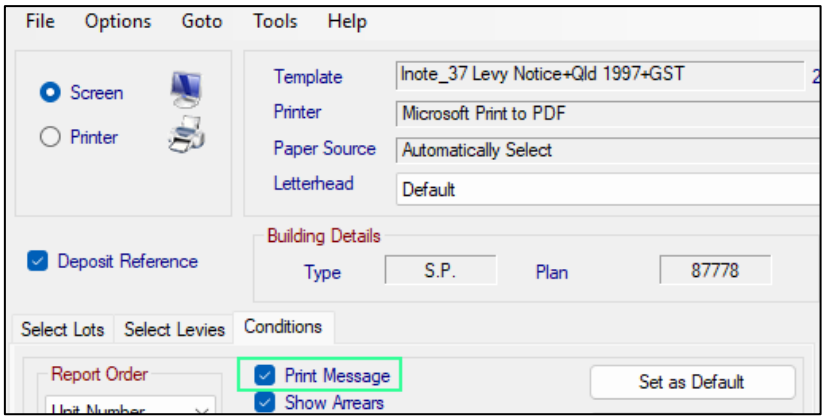
7.4 Migration Notes

- Existing messages from Levy Notices and Reports will be **automatically migrated** to Levy Management during upgrade to this version

- Post-upgrade changes are **not synchronised across modules**:
  - Messages added, edited, or deleted in Levy Notices after upgrade will not be added or updated in Levy Management
  - Messages added, edited, or deleted in Levy Management after upgrade will not be added or updated in Levy Notices.

7.5 Configuration Dependency

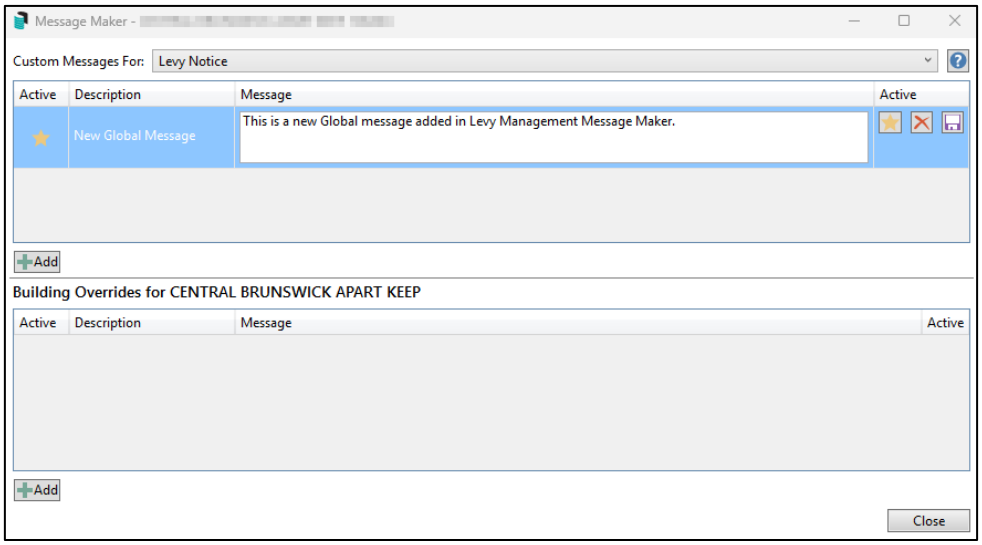
- The Message Maker module observes the **"Print Message"** setting in Levy Notices and Reports.
- If "Print Message" is disabled (unticked):
  - Messages will not be printed, even if configured as active in Message Maker



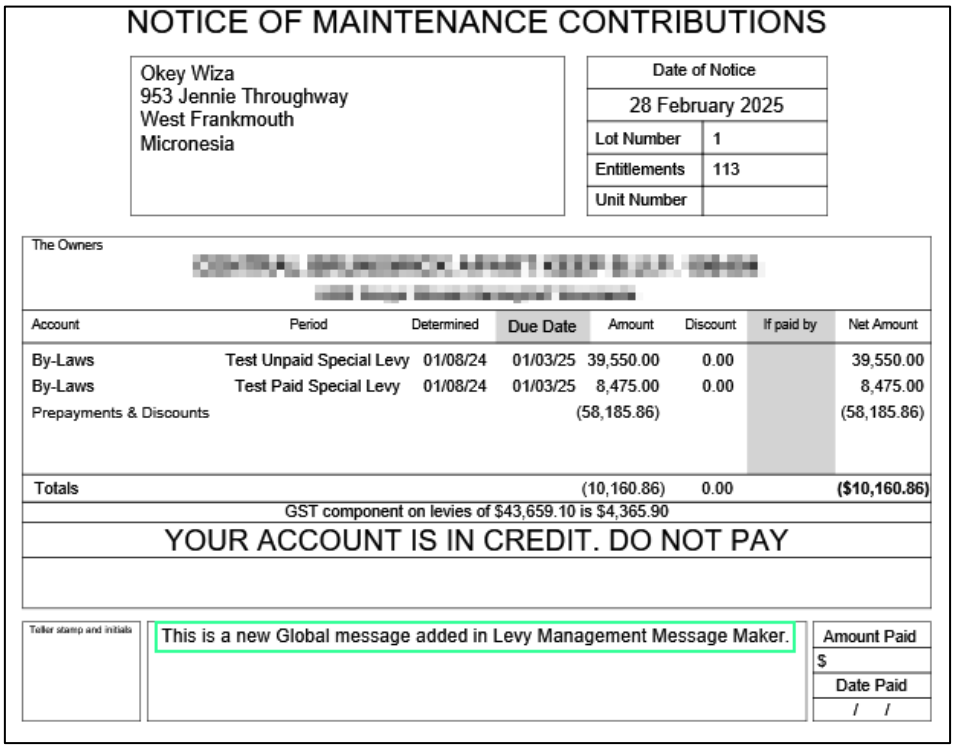
7.6 Using Levy Management Message Maker

Use the steps below to set up, edit or delete messages and set as active or inactive.

1. Navigate to Levy Management > Distribute > Configuration icon > Message Maker
2. Click the 'Add' button under Global or Building Override windows to add a new message line item
3. Click onto the line item to highlight and activate
4. Click into the Description field and click again to activate the cursor and add a Description for the note
5. Click into the Message field and click again to activate the cursor and add the message
6. Click the 'Save' icon to save the message
7. Click the 'Star' icon to set the message as active. Toggling this icon will remove the Active status if required
8. Click the delete icon to remove a message if required.
9. Close will close the screen



The active message will be produced on the notice.



NOTICE OF MAINTENANCE CONTRIBUTIONS

Okey Wiza
953 Jennie Throughway
West Frankmouth
Micronesia

Date of Notice	
28 February 2025	
Lot Number	1
Entitlements	113
Unit Number	

The Owners [redacted]

Account	Period	Determined	Due Date	Amount	Discount	If paid by	Net Amount
By-Laws	Test Unpaid Special Levy	01/08/24	01/03/25	39,550.00	0.00		39,550.00
By-Laws	Test Paid Special Levy	01/08/24	01/03/25	8,475.00	0.00		8,475.00
Prepayments & Discounts				(58,185.86)			(58,185.86)
Totals				(10,160.86)	0.00		($10,160.86)

GST component on levies of $43,659.10 is $4,365.90

YOUR ACCOUNT IS IN CREDIT. DO NOT PAY

Teller stamp and initials

This is a new Global message added in Levy Management Message Maker.

Amount Paid
$
Date Paid
/ /

8. Strata Manager – New Annual Report

A New Annual Report has been introduced to assist Strata Manager in meeting both legislative and client reporting requirements.

In line with the Section 55 of NSW legislation, Strata Managers are required to provide a summary of activities undertaken on behalf of a building. While this information has historically been available across multiple modules, this enhancement delivers a single, consolidated report for improved efficiency and providing greater visibility,

The report also has been designed to be used by other states as well for a streamlined, one-stop reporting solution.

8.1 Report Overview

The Annual Report provides comprehensive summary of management activity for a selected building across either:

- The building's financial year
- A user-defined date range

This enables managers to quickly generate a complete overview of services delivered to a scheme.

8.2 Report Inclusions

The Report consolidates key operational metrics and activities including:

- Total Activities captured
- Lots in the Scheme
- Total Bank Balance
- Levies
- Collection Rate %

Activity Summary

- DocMax Documents Added
- TRMax Recoveries (total Time Recorded)
- Emails Sent (from StrataMax)
- Work Orders Issued
- Quote Requests Issued
- Creditor Invoices Entered
- Levy Notices Issued
- Arrears Notices Issued
- Certificates Issued
- Roll Changes – Change of Ownership & Change of Details
- Insurance Claims Managed
- Meetings Held
- Tasks Completed
- Payment Plans Managed
- Debt Collections Commenced

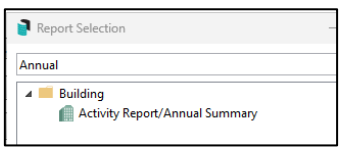
Please Note – Additional reports can also be included in the Report Set, new reports now available are:

- Insurance Claims
- Work Orders (Building)
- Work Order Quotes (Building)

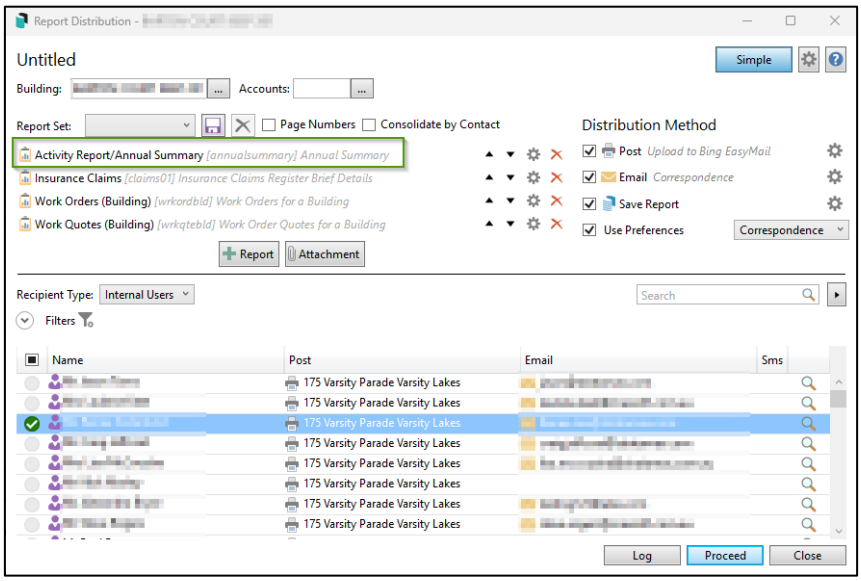
8.3 Producing - Annual Report

To access and generate the Annual Report, following the below steps:

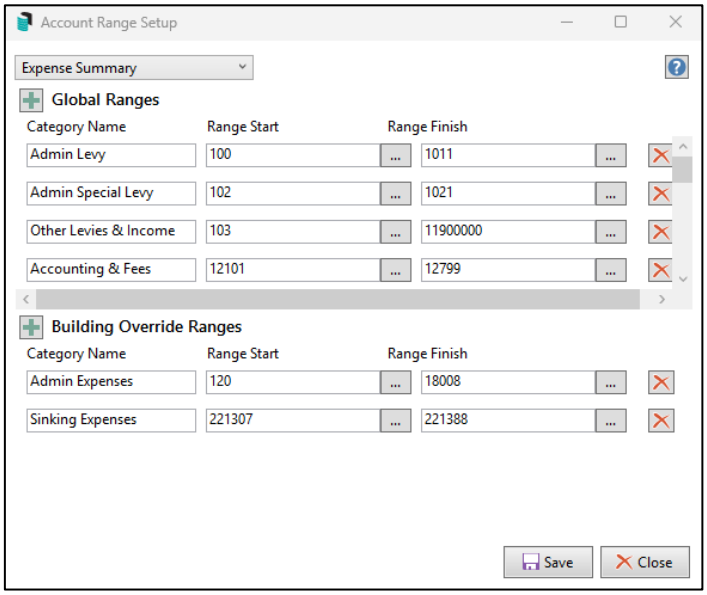
1. Navigate to 'Report Set'
2. Select the report 'Annual Report/Annual Summary



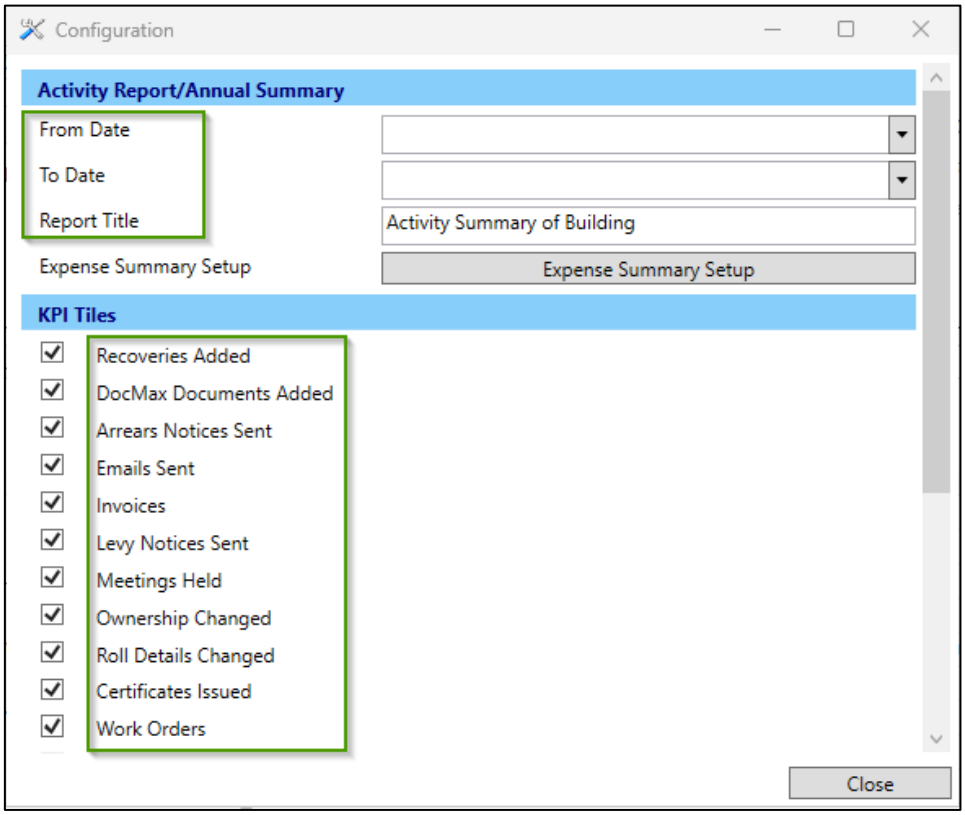
3. Add any additional reports if required



4. Click on the configuration ⚙ settings
5. Set the 'From Date and To Date'
6. Update the Report Title if required
7. Configure the Expense Summary Setup by configuring Global Ranges or Building Override ranges



8. Click 'Save' to apply Expense Summary settings
9. Select the required KPI Tiles to be displayed in the report

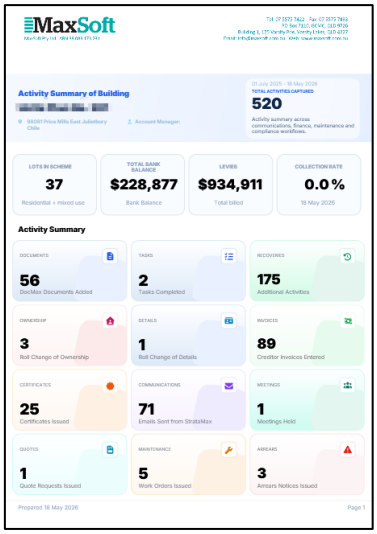


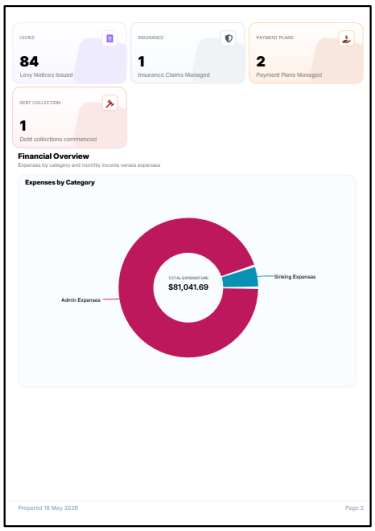
10. Select 'Recipient'
11. Click 'Proceed'

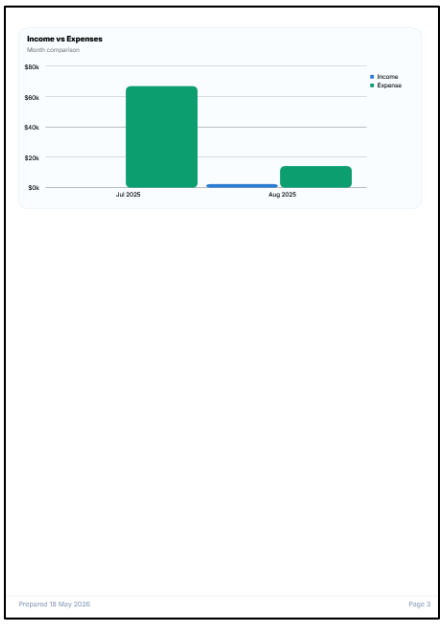
The Annual Report will then be generated

Please note – All configuration settings will reset once the module is closed, except for KPI Title selections, which will be retained.

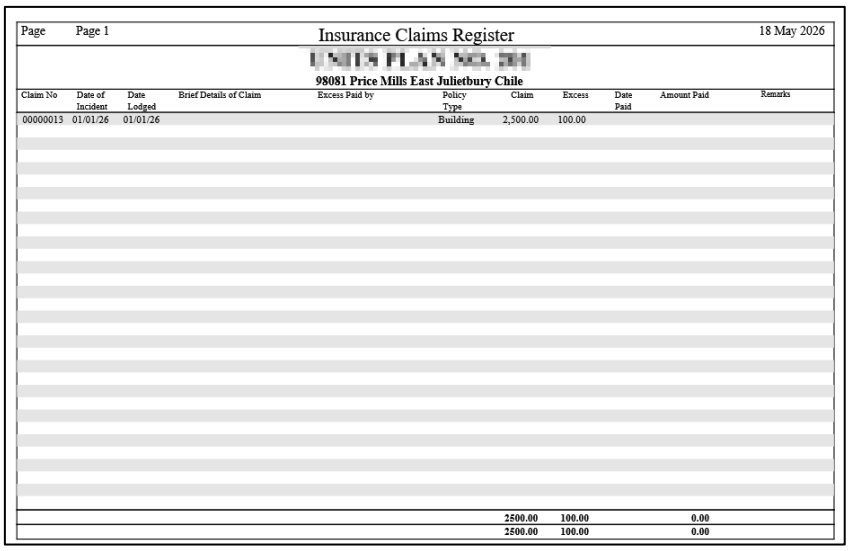
Example of Annual Report with attached reports:







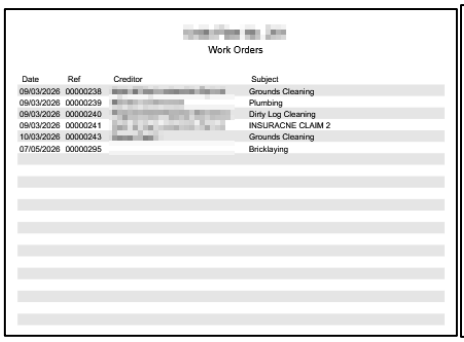
Other Reports which an be included:



Page Page 1 — Insurance Claims Register — 18 May 2026

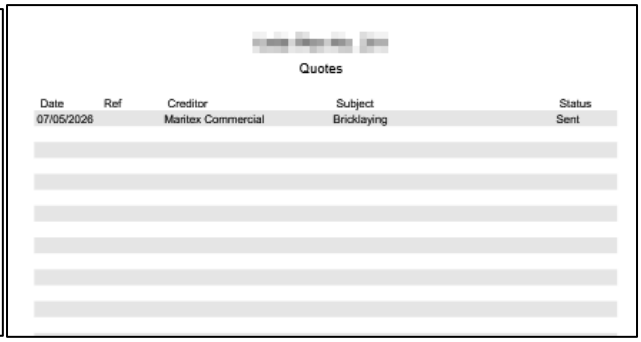
98081 Price Mills East Julietbury Chile

Claim No	Date of Incident	Date Lodged	Brief Details of Claim	Excess Paid by	Policy Type	Claim	Excess	Date Paid	Amount Paid	Remarks
00000013	01/01/26	01/01/26			Building	2,500.00	100.00			
						2500.00	**100.00**		**0.00**	
						2500.00	**100.00**		**0.00**	



Work Orders

Date	Ref	Creditor	Subject
09/03/2026	00000238		Grounds Cleaning
09/03/2026	00000239		Plumbing
09/03/2026	00000240		Dirty Log Cleaning
09/03/2026	00000241		INSURACNE CLAIM 2
10/03/2026	00000243		Grounds Cleaning
07/05/2026	00000295		Bricklaying



Quotes

Date	Ref	Creditor	Subject	Status
07/05/2026		Maritex Commercial	Bricklaying	Sent

What's Better

- DocMax Add Documents window - The Add Documents window will now maintain set size and position when altered from Outlook - Add with Details, DocMax Drop Box and Drag and Drop.
- Change Building Number – was causing an error when updating building selected in BCMax. Issue has been resolved.
- Report Distribution Export Recipient to Excel – was exporting all Recipients not tagged Recipients. This has been resolved.
- Report Distribution Distribute Levies notice – was not displaying Arrears breakdown when selected. This has been resolved.
- Report Distribution Common Property Report – Description of Area was overflowing to the next field; this has been resolved. Authority Given to and Address now combined into one column and will wrap to next Cell. Conditions and Description Text now combined into one column and will wrap to next Cell.
- Certificates – Consolidated Certificate was printing for all Account Groups. Certificate now only prints for the relevant Account Groups.
- Ledger Card (legacy) – selecting configuration was causing an error. This has been resolved.
- Creditor Compare – When deleting a Creditor that was linked to an Office Bearer, this was causing an error. This has been resolved.
- Transaction Manager – Balance brought forward containing Debtor transactions could be flagged as hidden. This has been resolved.
- Ledger card – When selecting Month to Date if there were no transactions in the month, the opening balance was displaying as zero or caused a crash. This has been resolved. Now, when Month to Date is selected the Ledger Card defaults to the current month and Balance Brought Forward is displayed.
- Account Maintenance - adding an account from the Master Chart for a Trading Fund that was not in the building was causing an error. Clients can no longer see or select accounts linked to Trading Funds that do not belong to their building.
- Financial reports – there was an issue with the variables for Income, Expense and user range not updating. This as causing the Financials - Income and Expenditure Report and Financials - selecting Pres. Financial Statements (No%) to error. This has been resolved
- Contact Cleanup - Reference constraint error when merging two contacts with bank account changes will no longer appear. A new validation message will be returned if the merging contacts with ban account changes are pending. History of changes from the merged contact will now be retained in history and will show that they were merged.
- Building Health report - Investment Bank Accounts column on Building Health search was reporting incorrectly the Investment Account Bank Balances. This has now been resolved