Release Notes – Version 5.6.157

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. Inspections Bulk Upload

The Inspections Register has been enhanced to allow Bulk Updates of multiple Inspections.

Security has been introduced to access Bulk Inspections changes. The new security permission is titled 'Inspections – Bulk Change Inspection Types' and can be accessed via current security permissions.

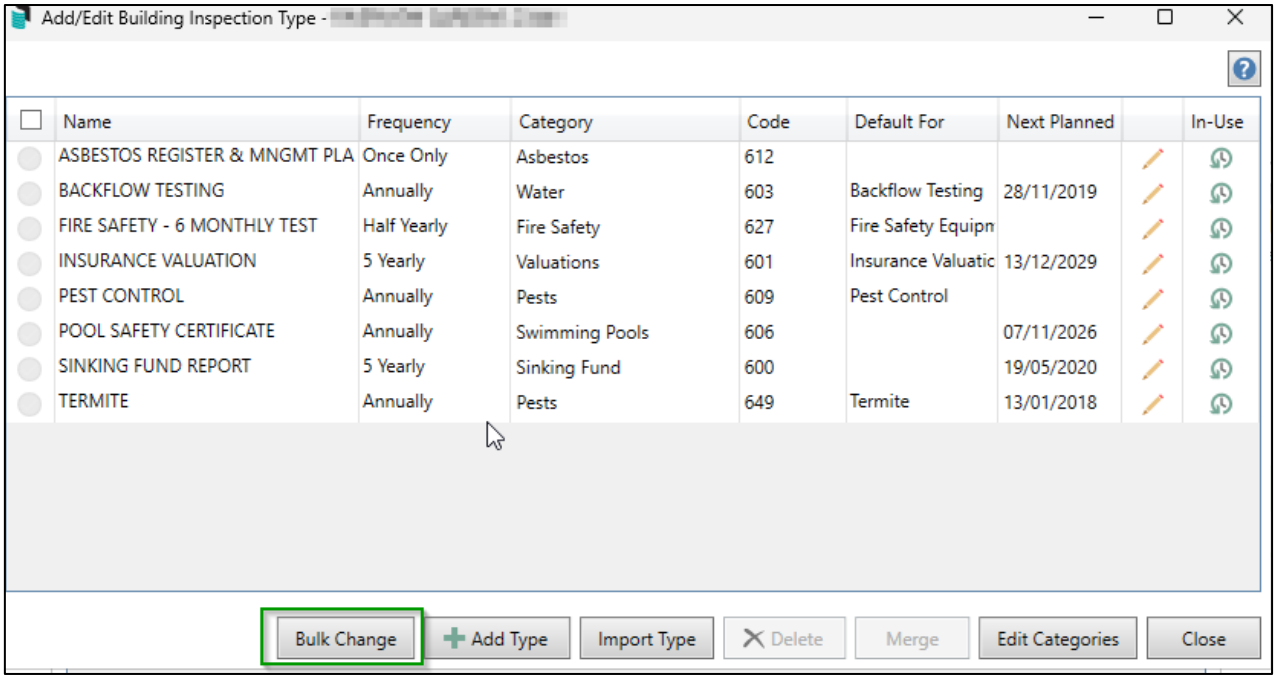
The following fields can be updated for multiple Inspections:

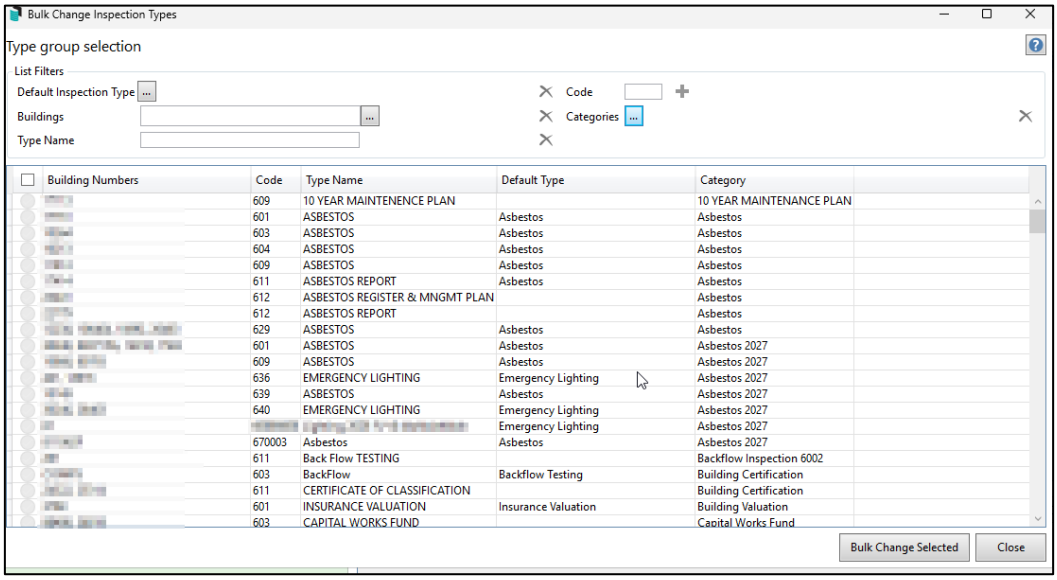
- Abbreviation Code
- Type Name
- Frequency
- Category
- Default Inspection

.

To access Bulk Inspections:

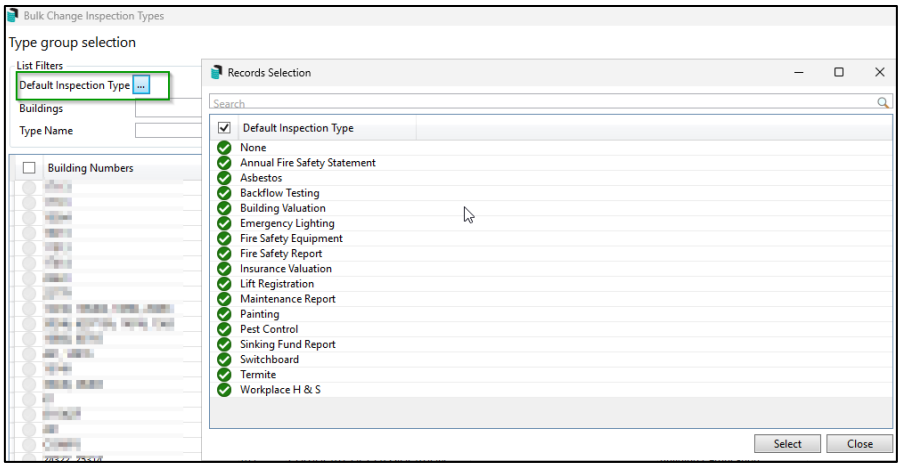
1. Navigate to Inspections
2. Add/Edit Inspection Types
3. Select Bulk Change



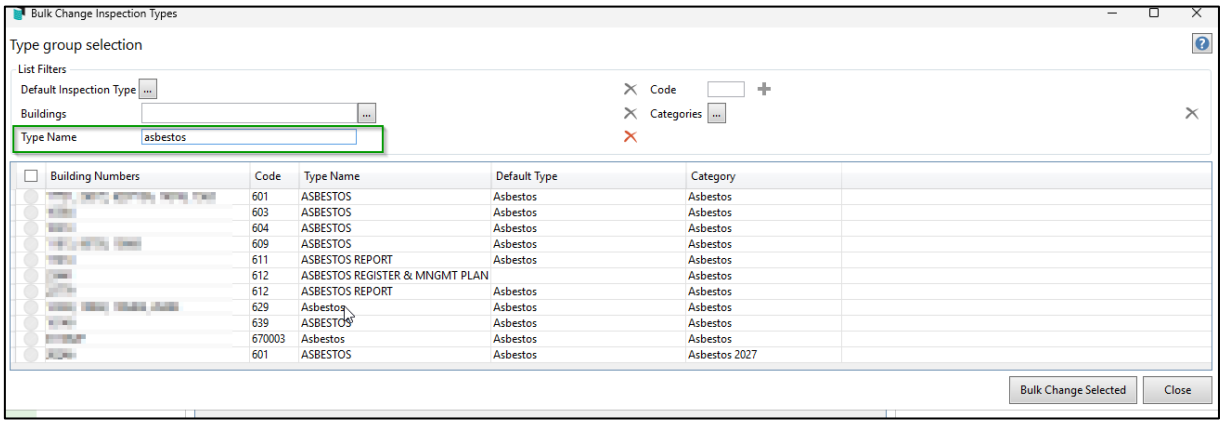


1.1 Bulk Change Inspection Types – Filters

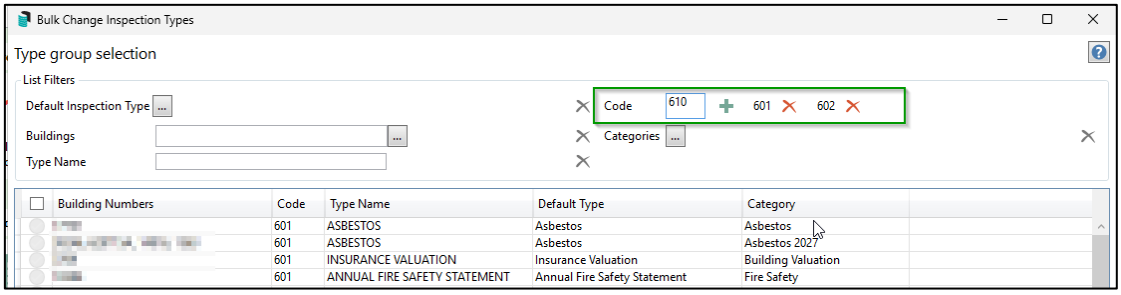
- **Default Inspection Types:** allows clients to search, select multiple or select all Default Inspections



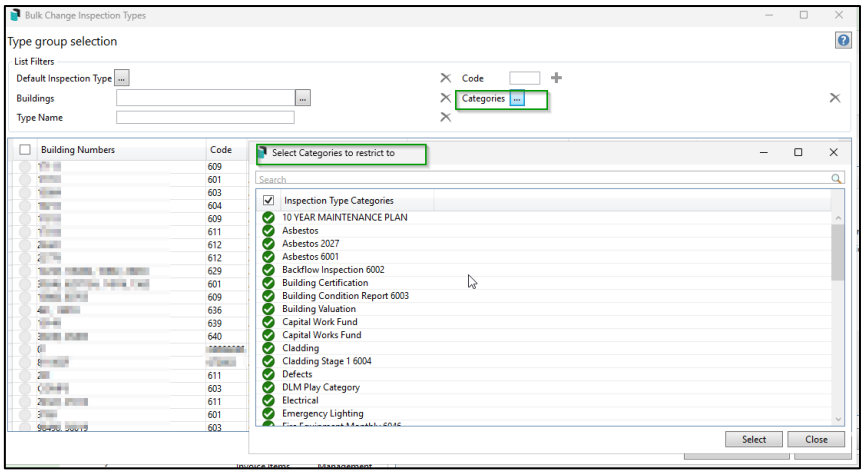
- **Buildings:** is the standard building selector used in StrataMax
- **Type Name:** allows client to search by Inspections Type names



- **Code**: to search by code, enter the code in the code field and select the + button. Multiple codes can be searched on



- **Categories:** allows clients to search, select multiple or select all Categories



Important Information:

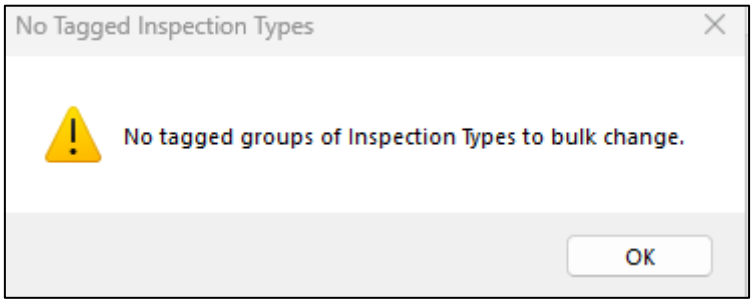
When you enter your search criteria, buildings that share the same Code, Type Name, Default Type, and Category will be grouped together in the Building Numbers column.

To clear filters, click the X (clear/remove) against each filter.

1.2 Bulk Change Selected – Bulk update

Once your search criteria has been entered, tag the Inspections you wish to update.

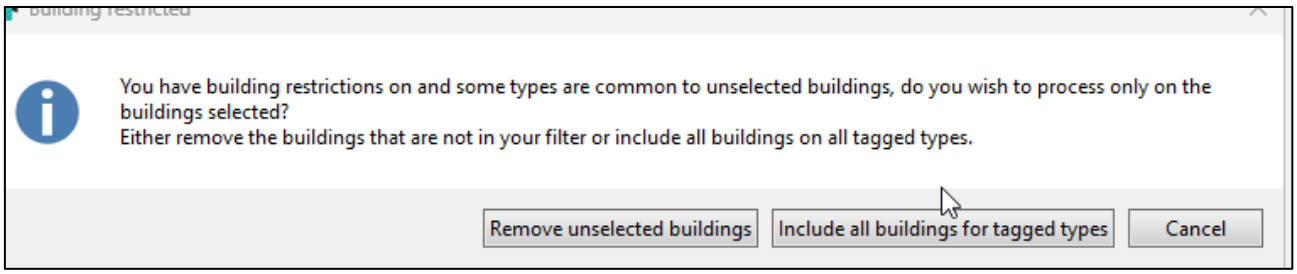
If you have not tagged buildings, a message will be display.



When you have tagged your buildings, the following message may also appear.

This gives the option to:

- Remove buildings that may have not been selected but are listed against the Inspection Types you wish to update
- Include all buildings tagged for types

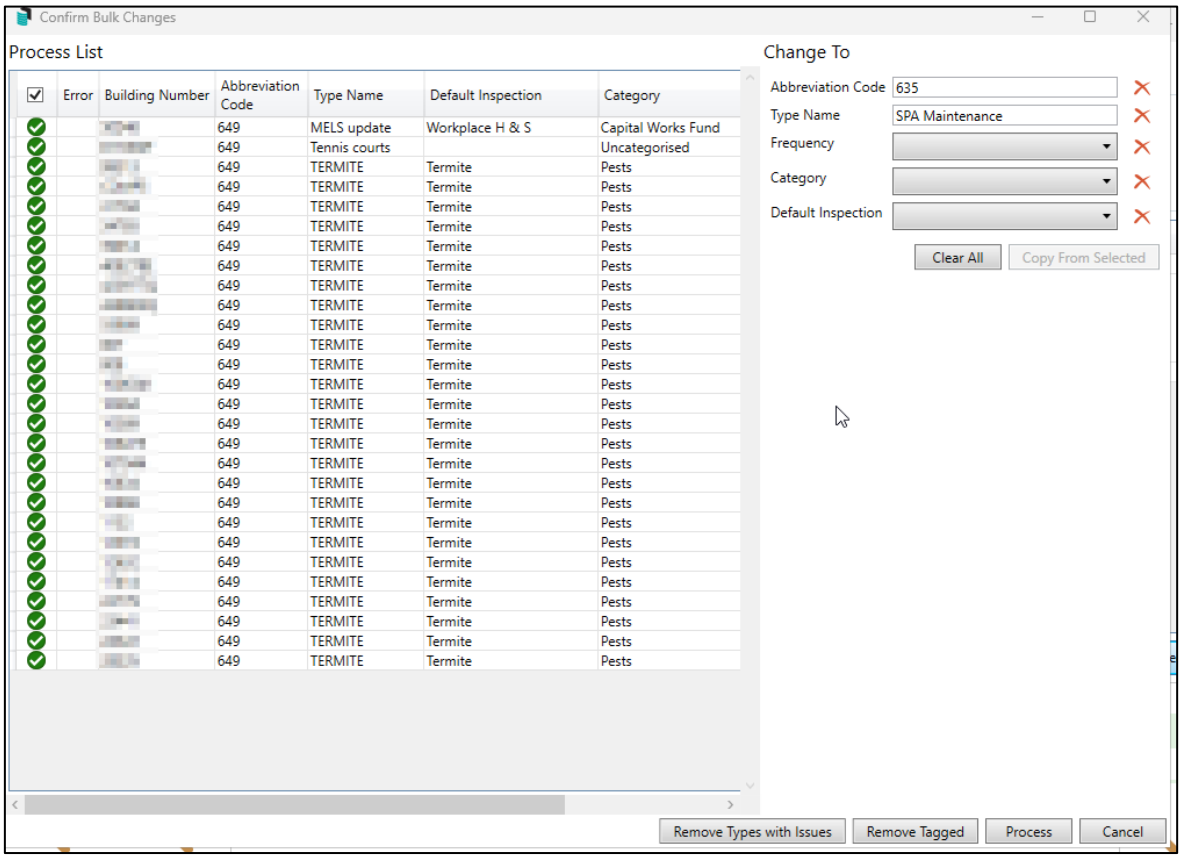


1. Click Bulk Change Selected

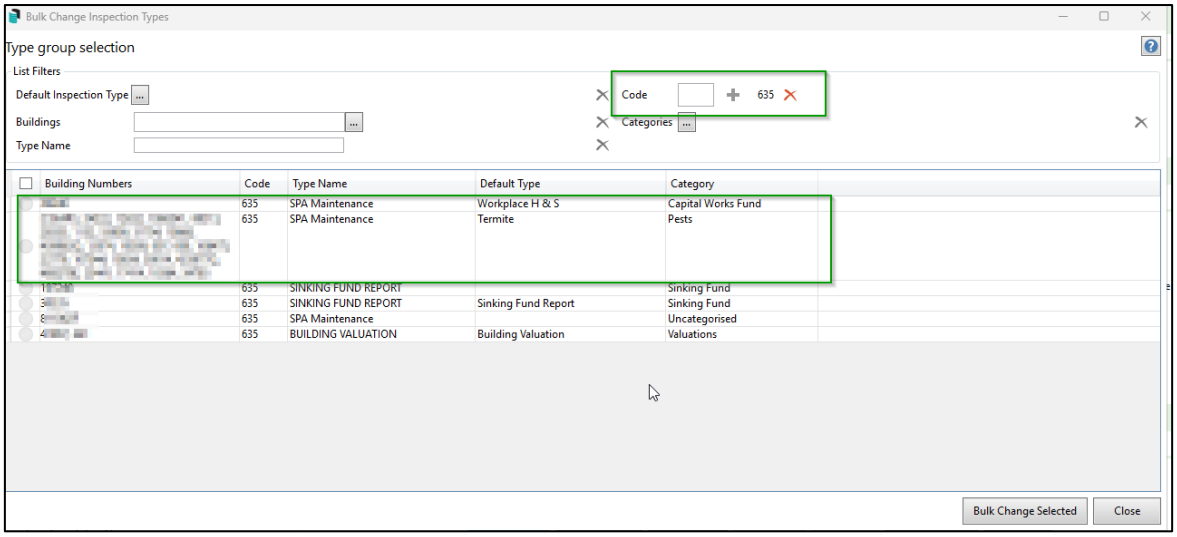
All buildings selected will appear in the Process list on separate rows

From this screen you can update the following:

- Abbreviation Code
- Type Name
- Frequency
- Category
- Default Inspection



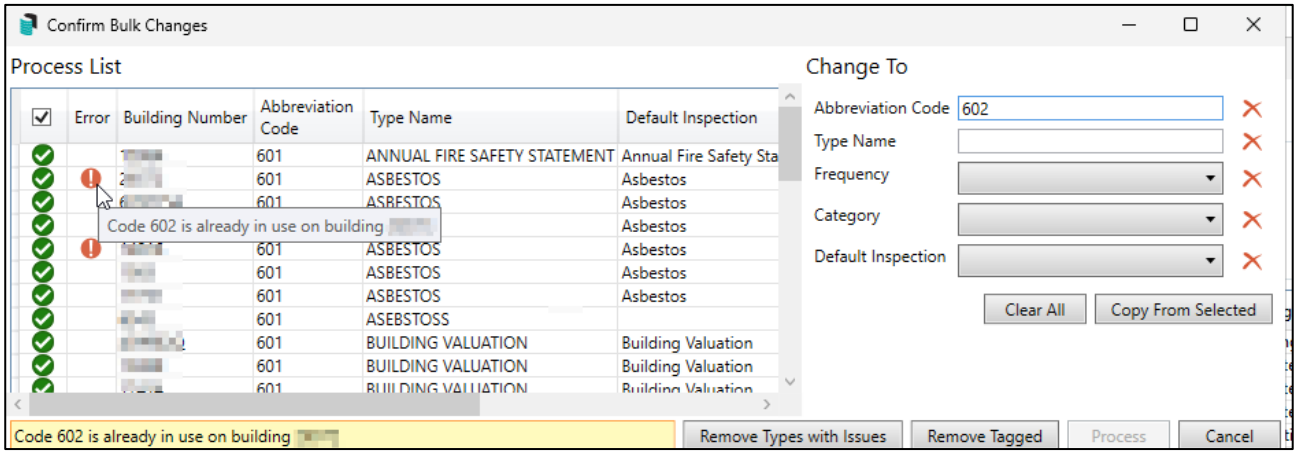
Once your changes are entered and Process selected, you can view the updated Inspections by searching on the Building Change Inspection Types screen

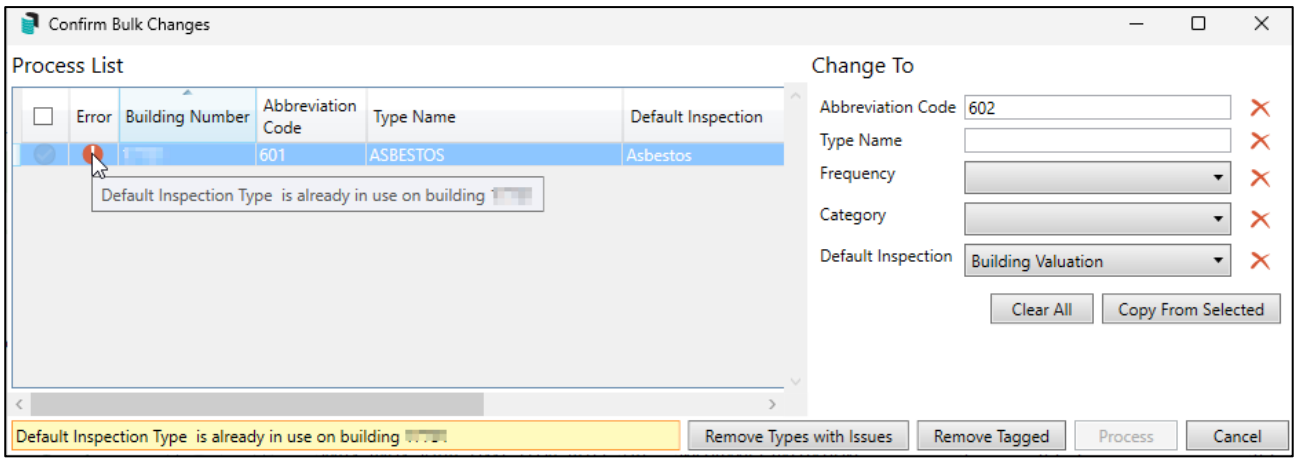


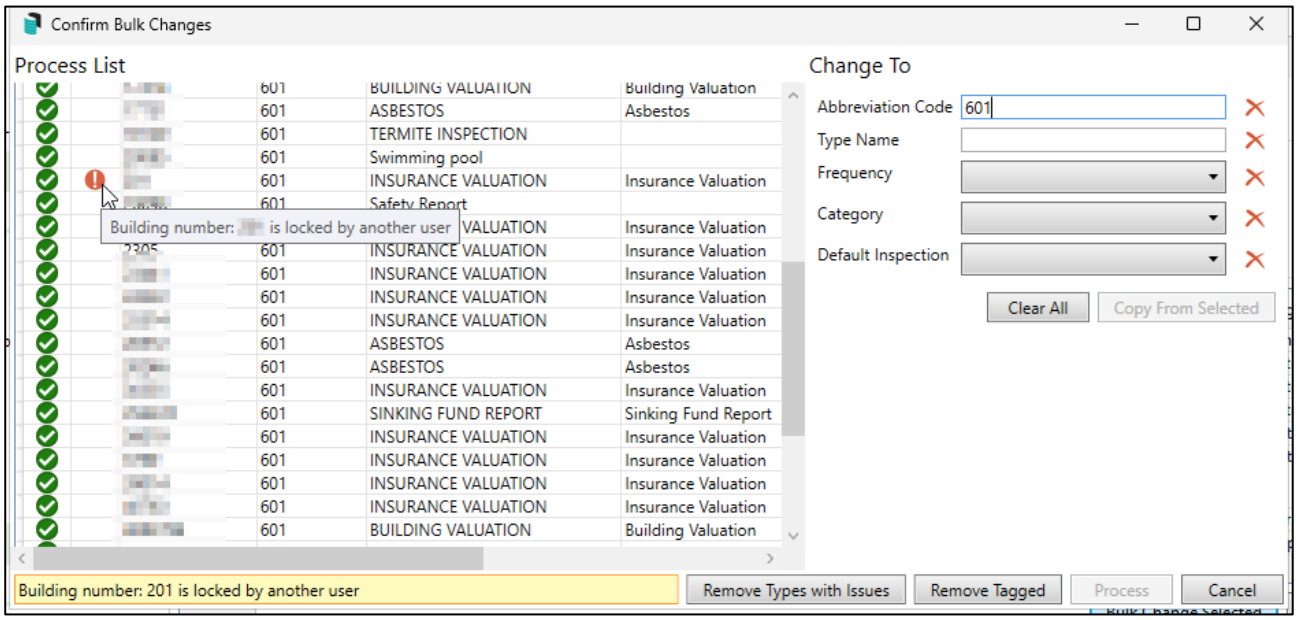
Important Information

- If a building is in error, it will flag and the process button will be disabled
- If an Abbreviation code is entered that is already used by a building, the building will be flagged in error
- If a Type Name is already in use by a building, the building will be flagged in error
- If a Default Inspection is already in user by a building, the building will be flagged in error
- Changes to Frequency will also update the Inspection dates on the Inspections screen
- If a single building is listed multiple times due to having more than one selected Inspection type, you will not be able to make updates as properties must be unique to each building. Buildings may have to be removed to process list

Example of errors





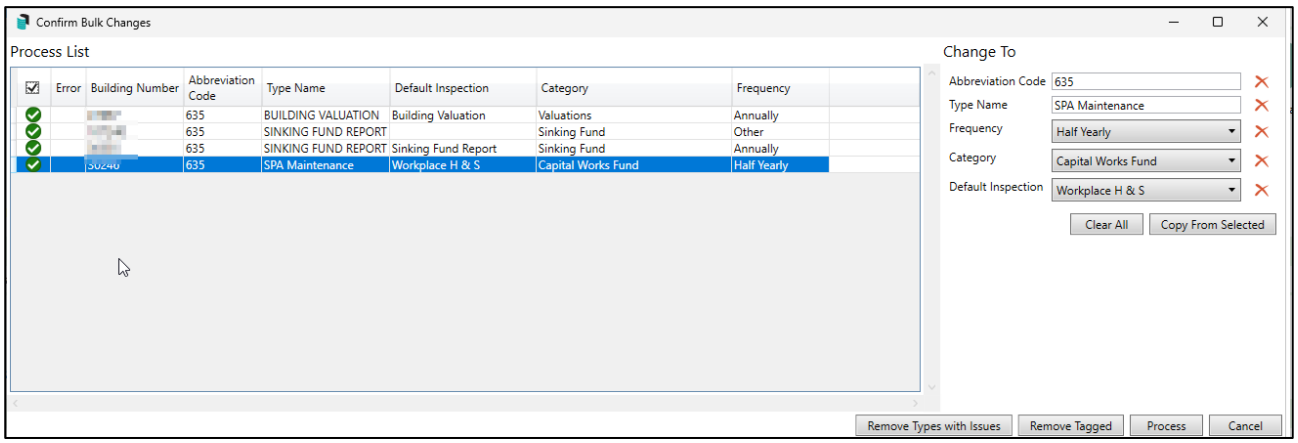


1.3 Bulk Change Selected – 'Copy from Selected'

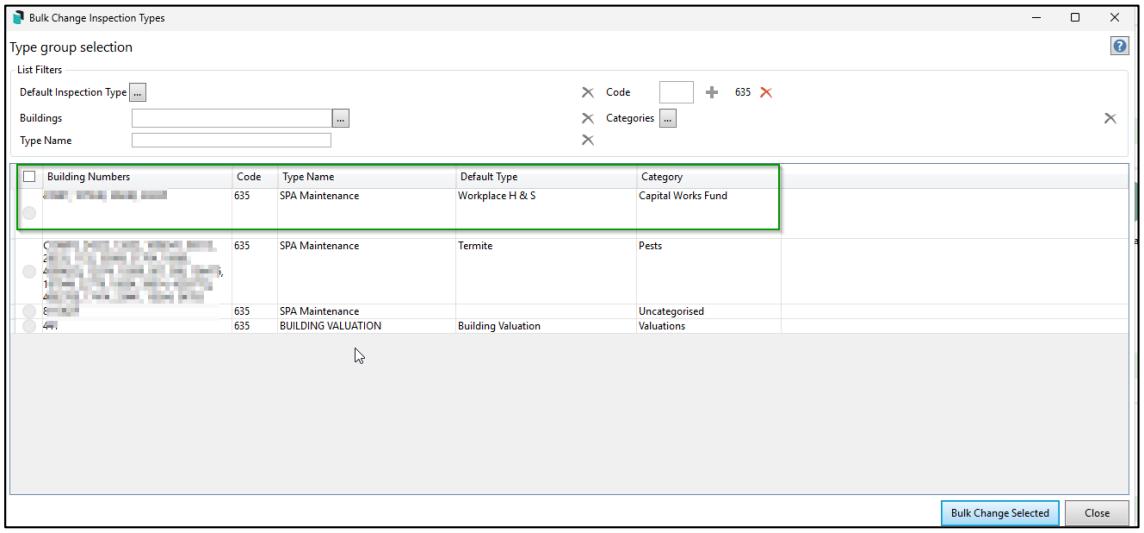
New functionality has been introduced to allow clients to copy from one Inspection to multiple Inspections.

From the Confirm Bulk Changes screen:

1. Highlight the Inspection to be copied 'from'
2. Select Copy from Selected
3. Abbreviation, Type Name, Frequency, Category and Default Inspection will be populated with details of the highlighted Inspection
4. Remove Types with Issues
5. Tag buildings
6. Process



Building Inspections have been updated with the copied Inspection details

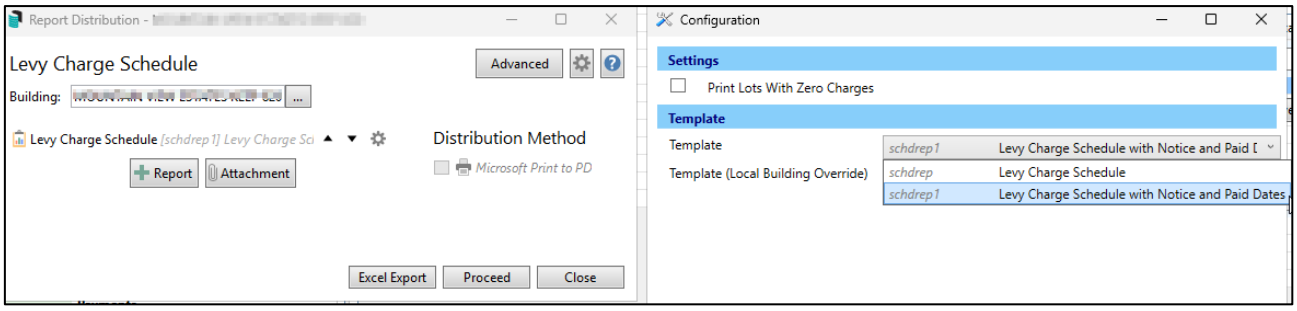


2. Levy Charge Schedule report

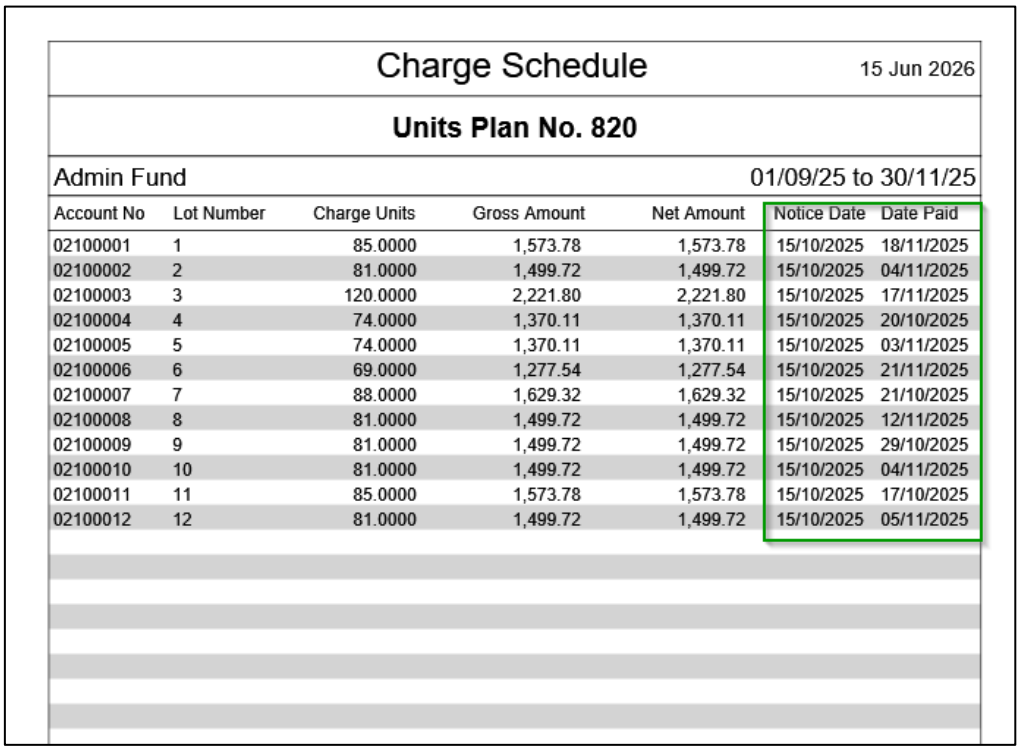
A new Levy Charge Schedule report has been created to include the Notice Date and Paid date.

To view report:

1. Navigate to Levy Management
2. Highlight Levies select View Lot Charges
3. Levy Detail select Report
4. Report Distribution, configuration Cog



5. Proceed



Charge Schedule 15 Jun 2026

Units Plan No. 820

Admin Fund 01/09/25 to 30/11/25

Account No	Lot Number	Charge Units	Gross Amount	Net Amount	Notice Date	Date Paid
02100001	1	85.0000	1,573.78	1,573.78	15/10/2025	18/11/2025
02100002	2	81.0000	1,499.72	1,499.72	15/10/2025	04/11/2025
02100003	3	120.0000	2,221.80	2,221.80	15/10/2025	17/11/2025
02100004	4	74.0000	1,370.11	1,370.11	15/10/2025	20/10/2025
02100005	5	74.0000	1,370.11	1,370.11	15/10/2025	03/11/2025
02100006	6	69.0000	1,277.54	1,277.54	15/10/2025	21/11/2025
02100007	7	88.0000	1,629.32	1,629.32	15/10/2025	21/10/2025
02100008	8	81.0000	1,499.72	1,499.72	15/10/2025	12/11/2025
02100009	9	81.0000	1,499.72	1,499.72	15/10/2025	29/10/2025
02100010	10	81.0000	1,499.72	1,499.72	15/10/2025	04/11/2025
02100011	11	85.0000	1,573.78	1,573.78	15/10/2025	17/10/2025
02100012	12	81.0000	1,499.72	1,499.72	15/10/2025	05/11/2025

3. New Arrears - Report Distribution

Further enhancements have been implemented to the New Arrears functionality within Report Distribution, improving usability, reporting flexibility and configuration options:

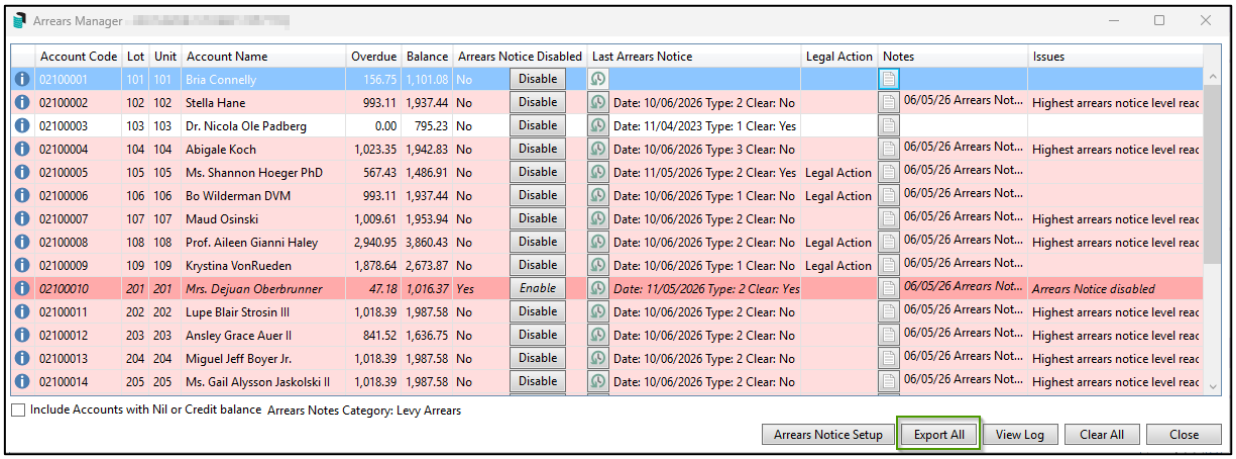
- Arrears Manager
  - Added access to the Ledger Card
  - Introduced the ability to export data to Excel
- Arrears Overdue Report
  - Added a new configuration setting to enable report generation even if there are no overdue accounts
- Arrears Fee Setup
  - Enabled exporting of all records, regardless of whether a Building Override is configured
- Template Configuration
  - Added support for exporting both Local and Global template configurations
- Pre-Issue Reports
  - Implemented various updates and improvements
- Overdue Report
  - Introduced a new field to enhance reporting detail

3.1 Arrears Manager – Access to Ledger Card and Export to Excel

Enhancements have been made to the Levy Arrears Manager user interface via Report Distribution to improve accessibility and data export capabilities.

3.1.1 Export All option

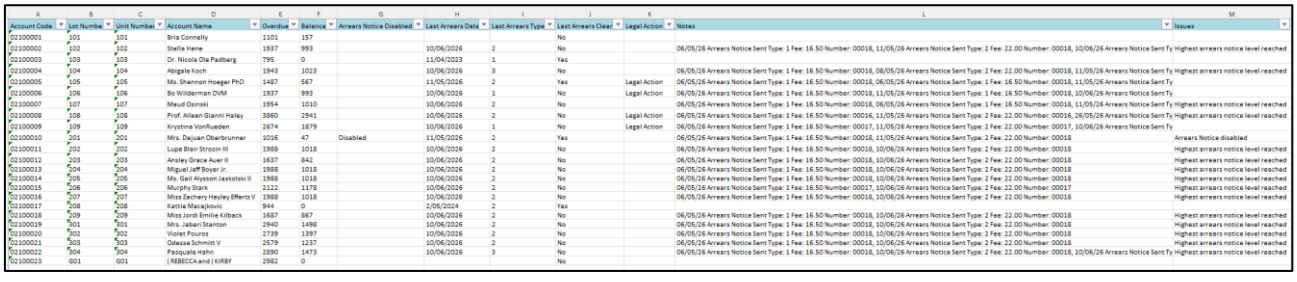
A new 'Export All' button has been added, enabling users to export all records currently displayed in the Arrears Manager screen directly to Excel.



To access this feature when using the Levy Arrears via Report Distribution global preview:

1. Navigate to 'Levy Management'
2. Select 'Options' menu
3. Select 'Levy Arrears Manager'
4. Click on the new 'Export All 'button option

The exported file will include all data exactly as presented within the Arrears Manager screen, ensuring consistency between the on-screen view and the exported report.



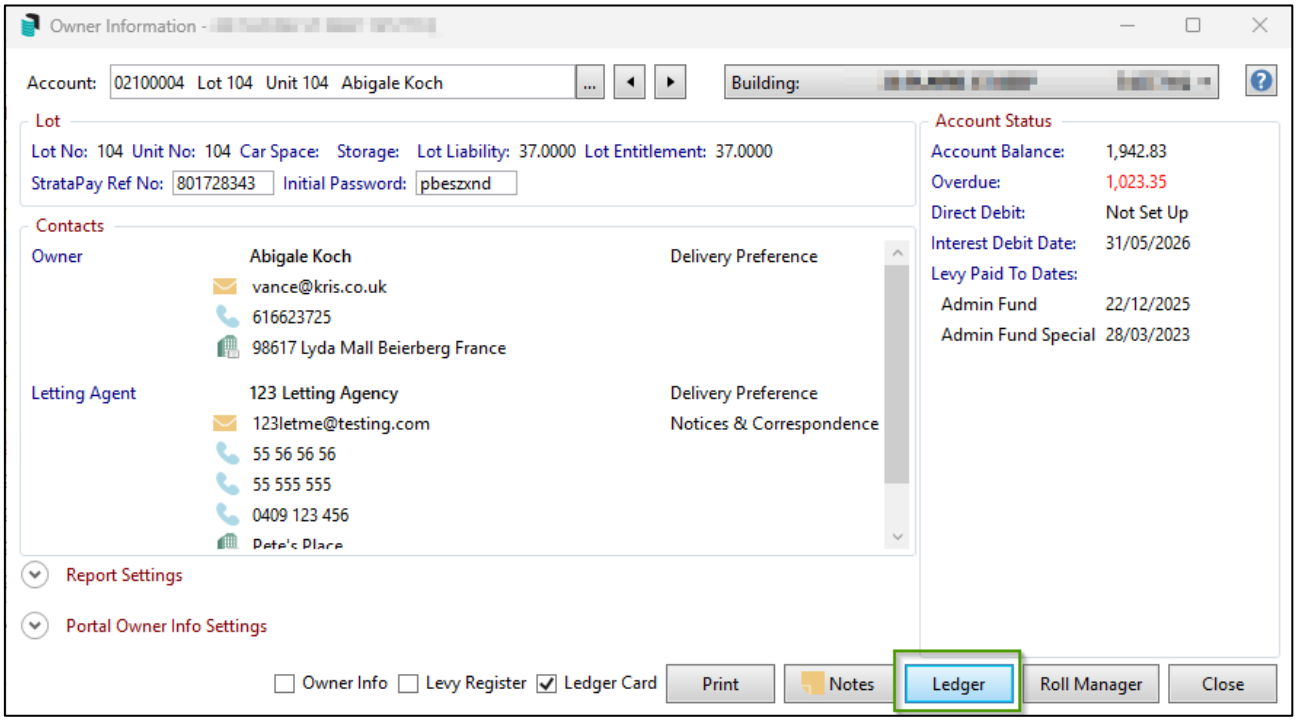
3.1.2 Arrears Manager – Access to Owners Info Ledger Card

Users can now access the Owner Information Ledger Card directly from the Arrears Manager screen, improving efficiency when reviewing account details and transaction history.

The feature is available via the icon located next to the account code.

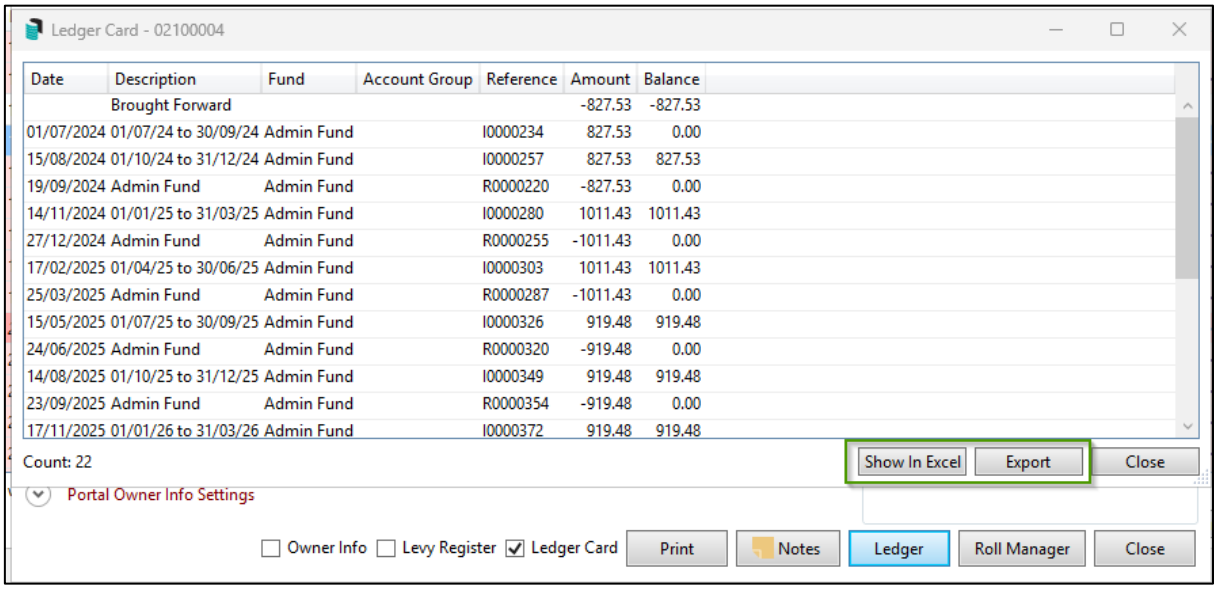
To access the Owner Information Ledger Card when using Arrears Notice via Report Distribution global preview feature.

1. Navigate to 'Levy Management'
2. Select the 'Options' menu
3. Select 'Levy Arrears Manager'
4. Click on the icon next to the Account Code
5. Owners Information screen will open
6. Ledger Card option is available



7. Click 'Ledger'
8. The ledger transactions will appear and can be exported or shown in Excel

This enhancement provides streamlined access to detailed account information directly from the Arrears Manager, reducing the need to navigate between multiple screens.



3.2 Arrears Overdue Report – New Configuration Setting

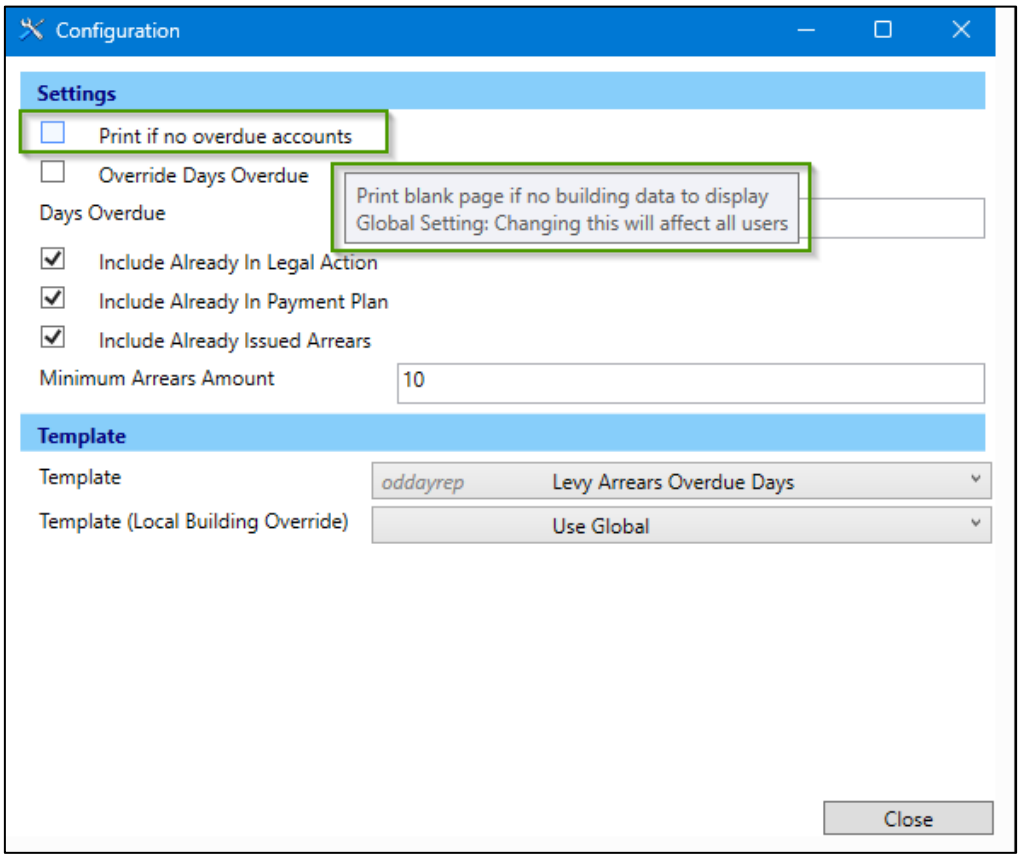
A new configuration setting has been introduced to prevent the generation of blank reports for selected buildings, improving report relevance and reducing unnecessary output.

Please Note – This setting is disabled by default, meaning blank reports will not be generated unless this option is enabled.

To access and update the setting:

1. Navigate to 'Levy Management;
2. Select 'Reports' option
3. Click 'Levy Overdue Accounts'
4. Select the Configuration (cog) icon
5. Locate the new setting – 'Print if no overdue accounts'

This enhancement provides greater control over report output, ensuring that only meaningful reports are generated unless otherwise required.

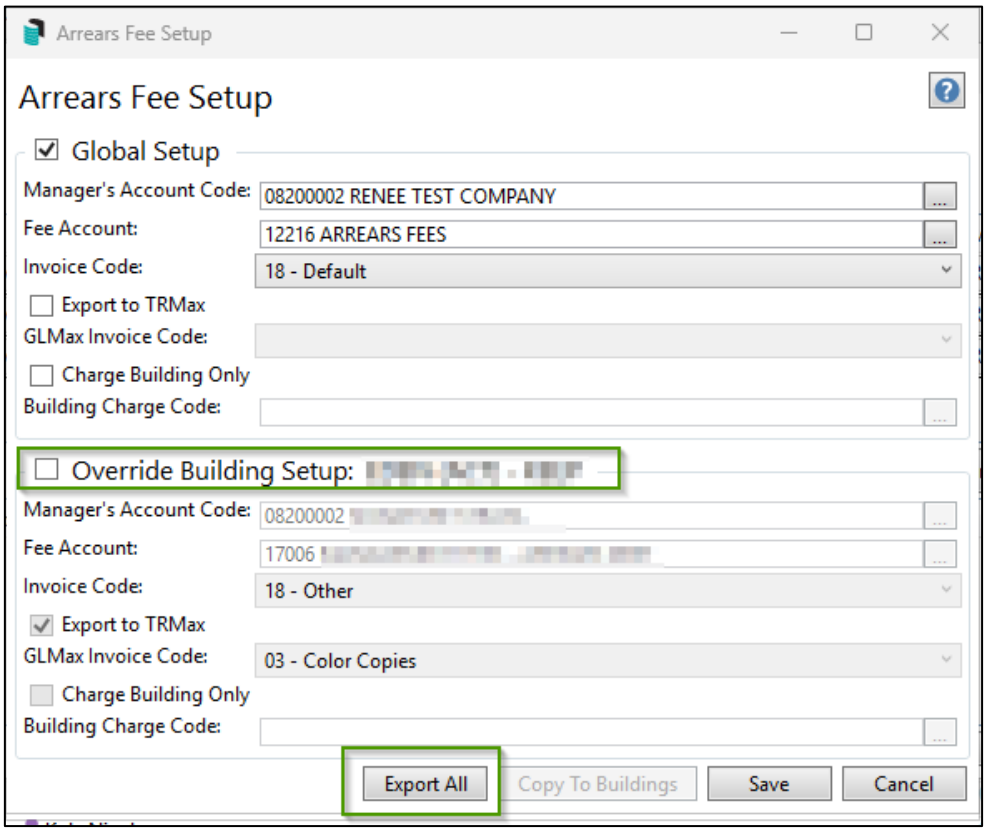


3.3 Arrears Fee Setup – Exporting All option available when Building Override is not set

An 'Export All' option has been introduced within Arrears Fee Setup when a Building Override is not configured, this enhancement enables uses to export all Arrears Fee Setup records, including global configurations, improving accessibility and efficiency.

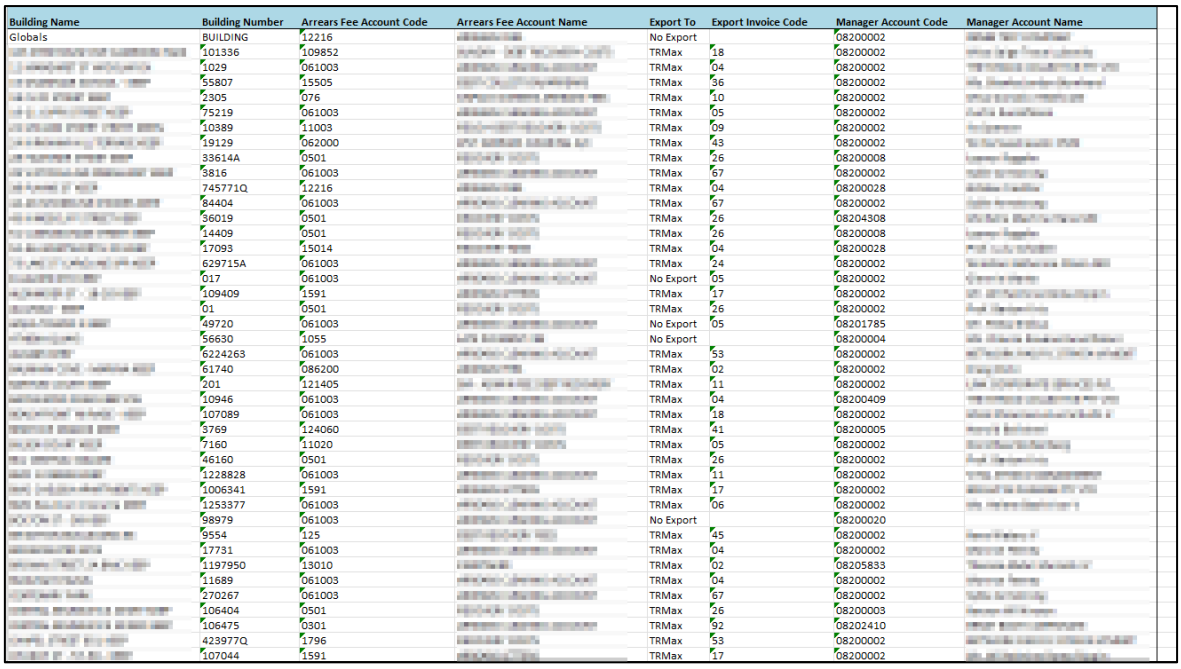
To use this feature:

1. Navigate to 'Levy Management'
2. Select the 'Report' menu
3. Select 'Levy Arrears'
4. On the Report Distribution screen, select the settings (cog) icon
5. Click on 'Arrears Notice Setup'
6. Select the Fee Setup option
7. Export All option will now be available if the Override Building setup is unticked or not set up.



8. Click 'Export All'
9. Excel will open and report all the Setup including Global

This enhancement allows for comprehensive export of Arrears Fee Setup data without requiring a Building Override to be defined.



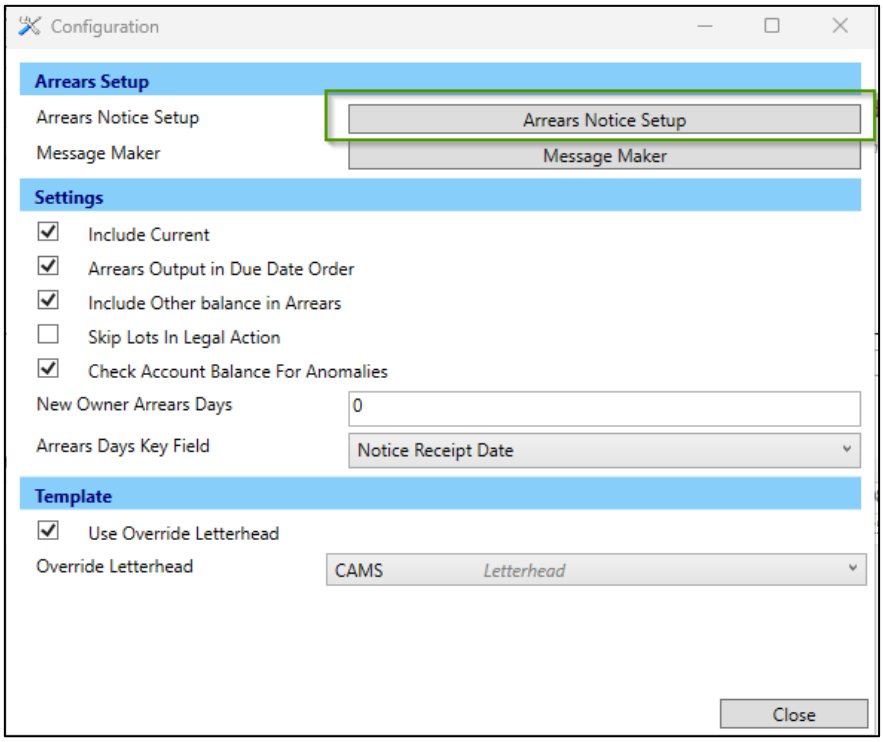
Building Name	Building Number	Arrears Fee Account Code	Arrears Fee Account Name	Export To	Export Invoice Code	Manager Account Code	Manager Account Name
Globals	BUILDING	12216		No Export		08200002	
	101336	109852		TRMax	18	08200002	
	1029	061003		TRMax	04	08200002	
	55807	15505		TRMax	36	08200002	
	2305	076		TRMax	10	08200002	
	75219	061003		TRMax	05	08200002	
	10389	11003		TRMax	09	08200002	
	19129	062000		TRMax	43	08200002	
	33614A	0501		TRMax	26	08200008	
	3816	061003		TRMax	67	08200002	
	745771Q	12216		TRMax	04	08200028	
	84404	061003		TRMax	67	08200002	
	36019	0501		TRMax	26	08204308	
	14409	0501		TRMax	26	08200008	
	17093	15014		TRMax	04	08200028	
	629715A	061003		TRMax	24	08200002	
	017	061003		No Export	05	08200002	
	109409	1591		TRMax	17	08200002	
	01	0501		TRMax	26	08200002	
	49720	061003		No Export	05	08201785	
	56630	1055		No Export		08200004	
	6224263	061003		TRMax	53	08200002	
	61740	086200		TRMax	02	08200002	
	201	121405		TRMax	11	08200002	
	10946	061003		TRMax	04	08200409	
	107089	061003		TRMax	18	08200002	
	3769	124060		TRMax	41	08200005	
	7160	11020		TRMax	05	08200002	
	46160	0501		TRMax	26	08200002	
	1228828	061003		TRMax	11	08200002	
	1006341	1591		TRMax	17	08200002	
	1253377	061003		TRMax	06	08200002	
	98979	061003		No Export		08200020	
	9554	125		TRMax	45	08200002	
	17731	061003		TRMax	04	08200002	
	1197950	13010		TRMax	02	08205833	
	11689	061003		TRMax	04	08200002	
	270267	061003		TRMax	67	08200002	
	106404	0501		TRMax	26	08200003	
	106475	0301		TRMax	92	08202410	
	423977Q	1796		TRMax	53	08200002	
	107044	1591		TRMax	17	08200002	

3.4 Arrears Notice Setup – Export Local and Global Template Configurations

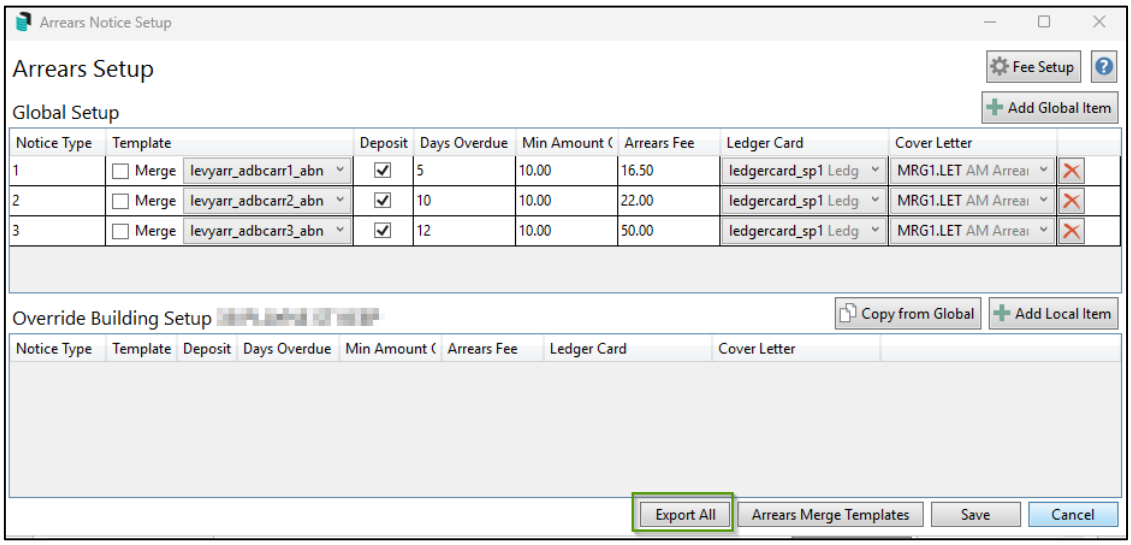
Uses can now export both Local and Global template configurations from the Arrears Notice Setup screen via Report Distribution. A new 'Export All' option has been added to streamline this process.

To export template configurations:

1. Navigate to Levy Management
2. Select Reports
3. Select Levy Arrears
4. Click on the Settings (cog) icon
5. Select 'Arrears Notice Setup'



The user interface now includes an 'Export All' option, allowing users to export all template configurations in a single action.



3.5 Pre-Issue Report Changes

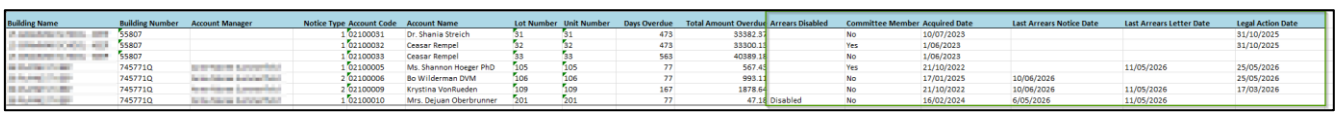
To improve clarity and provide more comprehensive reporting, several new columns have been added to the Pre-Issue Report:

- Arrears Notices Disabled
- Last Arrears Notice Date
- Last Arrears Letter Date
- Legal Action Date
- Date of Acquisition
- Committee Member

To generate this report:

1. Navigate to 'Levy Management'
2. Select the 'Report' Option
3. Click 'Levy Arrears Pre-Issue'
4. Select required buildings
5. Click 'Select'

The report will open excel, displaying the newly added columns alongside existing data.



3.6 Overdue Reports – Arrears Note Disabled field

The 'Arrears Notice Disabled' field has now been added to both the Overdue Reports and the Pre-Issue Report.

This enhancement provides improved visibility into account status, allowing users to easily identify accounts where arrears notices have been disabled.

Available in:

- Overdue Reports
- Pre-Issue Reports

This update enhances reporting accuracy and supports better decision making when reviewing arrear accounts.

Example – Overdue Report

Building	Account Code	Account Name	Account Manager	Amount Overdue	Days Overdue	Last Notice Date	Arrears Fee	Arrears Type	Legal Action Date	Arrears Notice Disabled
	02100002	Stella Hane		993.11	76	10/06/2026	22.00	2		
	02100004	Abigale Koch		1023.35	76	10/06/2026	50.00	3		
	02100005	Ms. Shannon Hoeger PhD		567.43	76				25/05/2026	
	02100006	Bo Wilderman DVM		993.11	76	10/06/2026	16.50	1	25/05/2026	
	02100007	Maud Osinski		1009.61	76	10/06/2026	22.00	2		
	02100008	Prof. Aileen Gianni Haley		2940.95	258	10/06/2026	22.00	2	17/03/2026	
	02100009	Krystina VonRueden		1878.64	166	10/06/2026	16.50	1	17/03/2026	
	02100010	Mrs. Dejuan Oberbrunner		47.18	76					Disabled
	02100011	Lupe Blair Strosin III		1018.39	76	10/06/2026	22.00	2		
	02100012	Ansley Grace Auer II		841.52	76	10/06/2026	22.00	2		
	02100013	Miguel Jeff Boyer Jr.		1018.39	76	10/06/2026	22.00	2		
	02100014	Ms. Gail Alysson Jaskolski II		1018.39	76	10/06/2026	22.00	2		
	02100015	Murphy Stark		1177.78	166	10/06/2026	22.00	2		
	02100016	Miss Zachery Hayley Effertz V		1018.39	76	10/06/2026	22.00	2		
	02100018	Miss Jordi Emilie Kilback		866.79	76	10/06/2026	22.00	2		
	02100019	Mrs. Jabari Stanton		1498.44	76	10/06/2026	22.00	2		
	02100020	Violet Pouros		1397.38	76	10/06/2026	22.00	2		
	02100021	Odessa Schmitt V		1237.29	76	10/06/2026	22.00	2		
	02100022	Pasquale Hahn		1473.17	76	10/06/2026	50.00	3		

Example – Pre-Issue Report

A	B	C	D	E	F	G	H	I	J	K
Building	Account Code	Account Name	Account Manager	Amount Overdue	Days Overdue	Last Notice Date	Arrears Fee	Arrears Type	Legal Action Date	Arrears Notice Disabled
	02100002	Stella Hane		993.11	76	10/06/2026	22.00	2		
	02100004	Abigale Koch		1023.35	76	10/06/2026	50.00	3		
	02100005	Ms. Shannon Hoeger PhD		567.43	76				25/05/2026	
	02100006	Bo Wilderman DVM		993.11	76	10/06/2026	16.50	1	25/05/2026	
	02100007	Maud Osinski		1009.61	76	10/06/2026	22.00	2		
	02100008	Prof. Aileen Gianni Haley		2940.95	258	10/06/2026	22.00	2	17/03/2026	
	02100009	Krystina VonRueden		1878.64	166	10/06/2026	16.50	1	17/03/2026	
	02100010	Mrs. Dejuan Oberbrunner		47.18	76					Disabled
	02100011	Lupe Blair Strosin III		1018.39	76	10/06/2026	22.00	2		
	02100012	Ansley Grace Auer II		841.52	76	10/06/2026	22.00	2		
	02100013	Miguel Jeff Boyer Jr.		1018.39	76	10/06/2026	22.00	2		
	02100014	Ms. Gail Alysson Jaskolski II		1018.39	76	10/06/2026	22.00	2		
	02100015	Murphy Stark		1177.78	166	10/06/2026	22.00	2		
	02100016	Miss Zachery Hayley Effertz V		1018.39	76	10/06/2026	22.00	2		
	02100018	Miss Jordi Emilie Kilback		866.79	76	10/06/2026	22.00	2		
	02100019	Mrs. Jabari Stanton		1498.44	76	10/06/2026	22.00	2		
	02100020	Violet Pouros		1397.38	76	10/06/2026	22.00	2		
	02100021	Odessa Schmitt V		1237.29	76	10/06/2026	22.00	2		
	02100022	Pasquale Hahn		1473.17	76	10/06/2026	50.00	3		

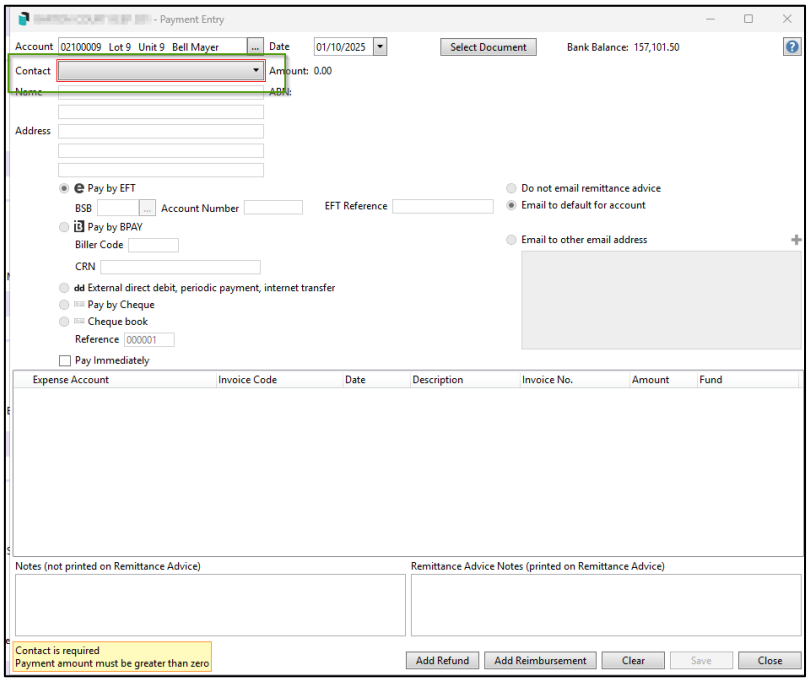
4. Payment Entry- Letting Agent Selection

Enhancements have been made to the Payment Entry process to allow users to select a Letting Agent associated with a lot. This improvement ensures refunds can be accurately directed to the correct recipient, reducing the risk of refunds being issued to owners when payments were made by letting agents.

When a lot account is selected, uses can now view and choose from a list of lined contacts, including both owners and agents, via a new 'Contact'; dropdown field.

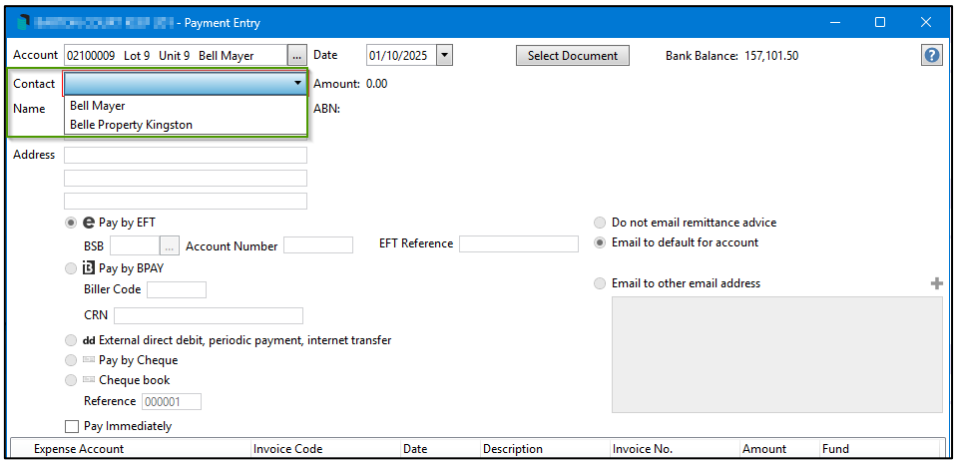
To access this new enhancement:

1. Navigate to 'Payment Entry'
2. Select the relevant log account
3. The user interface will now display a Contact dropdown field



4. Click on the Contact dropdown
5. Select from the available list of Owners and Letting Agents linked to the roll record

This enhancement improves the accuracy in refund processing and provides greater flexibility when managing payments associated with third-party agents.



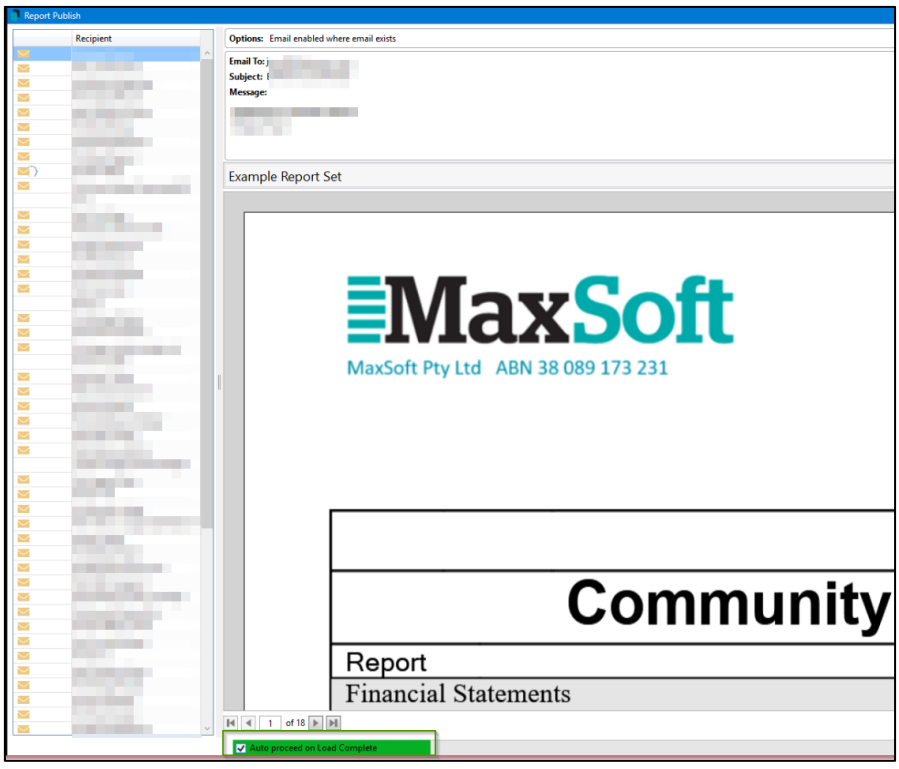
5. Report Distribution – Auto Proceed Option

A new 'Auto Proceed on Load Complete' option has been added within the Report Distribution screen. This feature allows users to bypass the preview stage, enabling reports to be automatically processed and distributed.

When this option is selected, reports will be emailed, printed or saved to DocMax immediately upon loading. The send button will not be displayed when this setting is enabled.

To set the new option follow the below steps:

1. Navigate to 'Report Set' for example
2. The Report Distribution will Open
3. Select a Report Set from the saved Report Sets
4. Choose all required Recipients
5. Click on Proceed
6. Tick the option 'Auto Proceed on Load Complete '



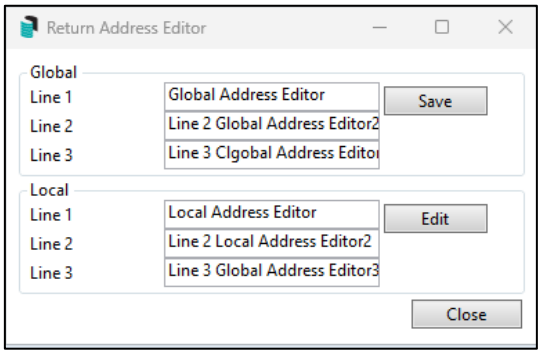
Important Note – This option must be selected immediately after the screen opens and before final document is loaded.

6. Return Address Editor

The Return Address Editor module has been redesigned and replaced with a new interface. This update ensures that return address data is stored within the database rather than in external files, improving integrity and accessibility.

This information is used in selected ledger card templates.

Please Note – All existing data from the previous module will be automatically migrated during the upgrade to version 5.6.157.



7. New Creditor Invoice – Preview

The Creditor Invoice interface has been refreshed across both StrataMax and DocMax to deliver a more modern, efficient, and accurate invoice processing experience. These enhancements are designed to streamline daily workflows, reduce administrative effort, and improve data accuracy.

The refreshed Creditor Invoice interface will now be available via the feature previews and can now be activated. The refreshed interface introduces a cleaner, more intuitive user experience while maintaining flexibility. It will be available as an optional preview feature, allowing users to trial the new interface while retaining access to the legacy version for a limited period.

This refresh provides a more efficient, centralised workflow with fewer clicks, reduced data entry, and smarter validation throughout the invoice lifecycle. Whether processing invoices individually or in bulk, these improvements help save time and support confidence in financial accuracy.

7.1 Enhanced Features

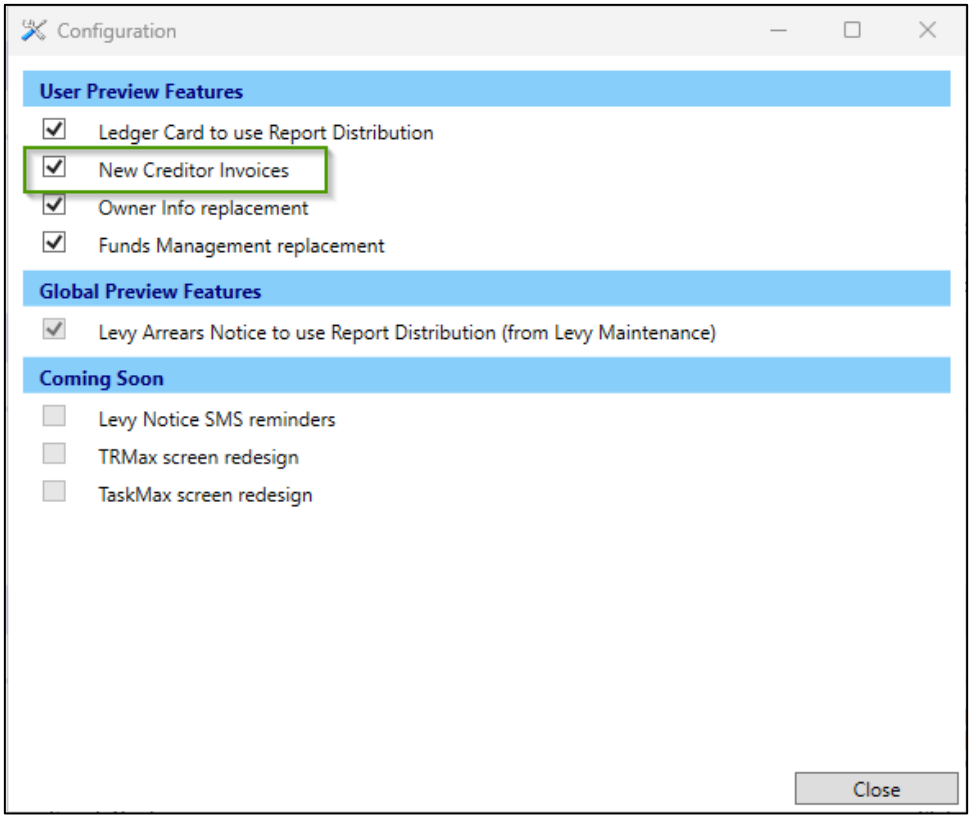
The following enhancements are included in the refreshed Creditor Invoice interface:

- Creditor Invoice (Preview) module user interface.
- Early detection of potential duplicate invoices during both data entry and saving.

- New user permission 'Allow Creation of Invoices with Duplicate Numbers'
- Ability to save invoices to the previous financial year to support year-end (accruals) processes.
- Improve Work Queue navigation, including the ability to skip documents and continue processing.
- Enhanced Work Order selection with visible Work Order counts and advanced search across all fields.
- Bulk Creation of Creditor Invoices directly from your Work Queue.
- Direct creation of Creditor Invoices directly from DocMax.
- Additional Enhancements to Interactive Reports and Creditor Invoice transactions accessed from various searches/modules.

Important note: If users want to utilise the New Creditor Invoices, they will need to active the Preview setting to see the new Creditor Invoice enhancements above,

Via the Preview options – select New Creditor Invoices



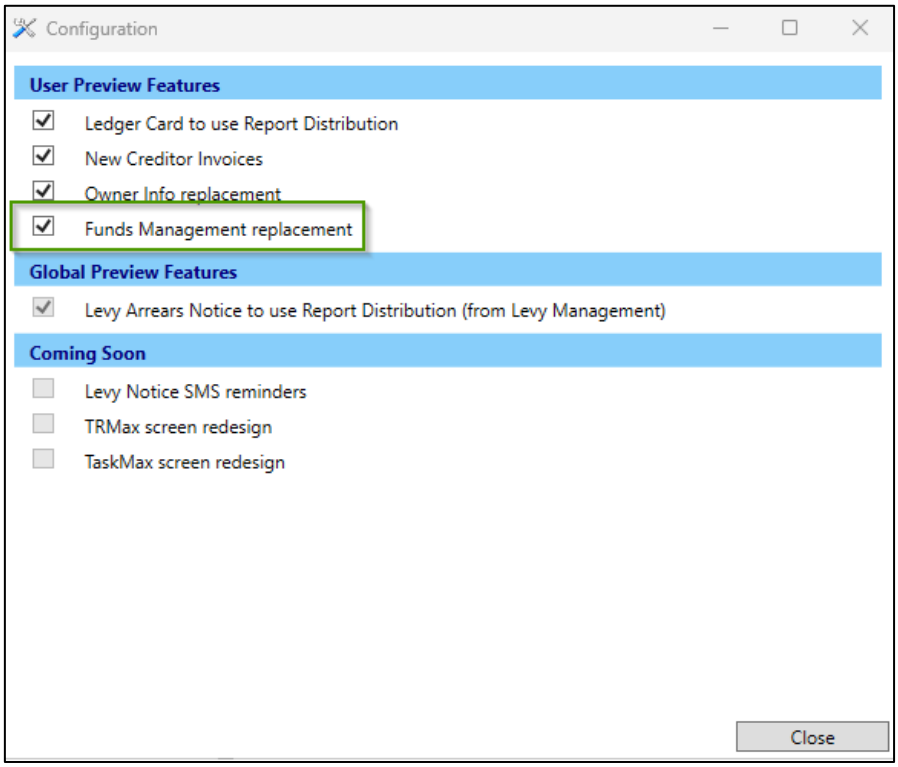
Further details on the changes, please refer to the published Release Notes – Creditor Invoice Refresh [StrataMax Release Notes | Online Help]

8. Funds Management Preview (NSW buildings)

The Funds Management Report is now available as a Preview Feature, enabling users to generate the report directly through Report Distribution.

This updated version includes enhanced formatting while maintaining fill alignment with the data and content of the legacy report.

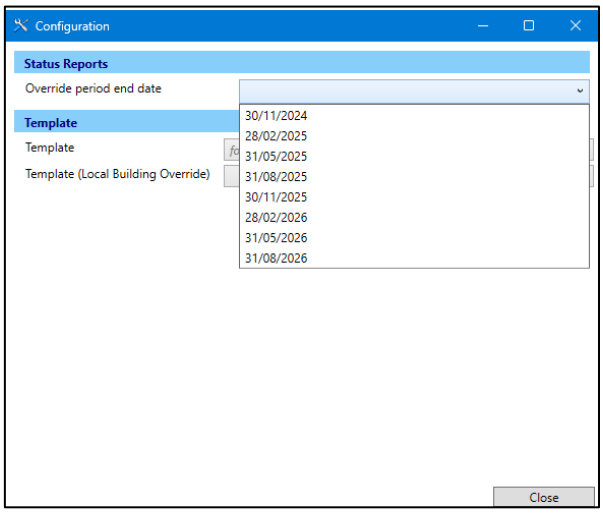
To access this functionality, users must activate the 'Funds Management Replacement' option within Preview Configurations.



Once enabled, selecting Funds Management Report from the menu will automatically launch the module via the Report Distribution interface.

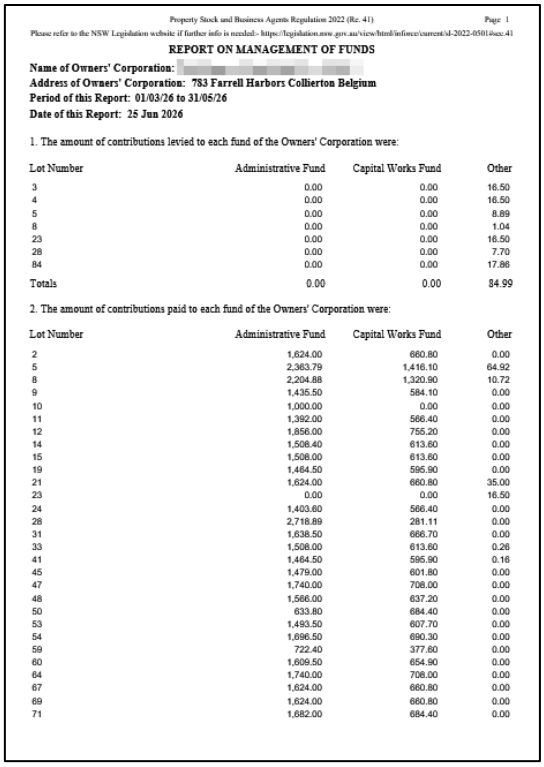
Accessing the Funds Management Report:

1. Ensure the preview option 'Funs Management Replacement' is enabled
2. Navigate to 'Funds Management Report' (NSW Building)
3. Select the 'Configuration' option
4. Use the Enhanced Override Perido End Date dropdown to select the desired reporting date



5. Confirm the Template is set to Form150f
6. Click 'Close'
7. Select the required buildings
8. Select the appropriate Recipients
9. Click 'Proceed'

The Funds Management Report will be generated, displaying all expected information in the updated format.



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Please refer to the NSW Legislation website if further info is needed:- https://legislation.nsw.gov.au/view/html/inforce/current/sl-2022-0501#sec.41

REPORT ON MANAGEMENT OF FUNDS

Name of Owners' Corporation: [redacted]
Address of Owners' Corporation: 783 Farrell Harbors Collierton Belgium
Period of this Report: 01/03/26 to 31/05/26
Date of this Report: 25 Jun 2026

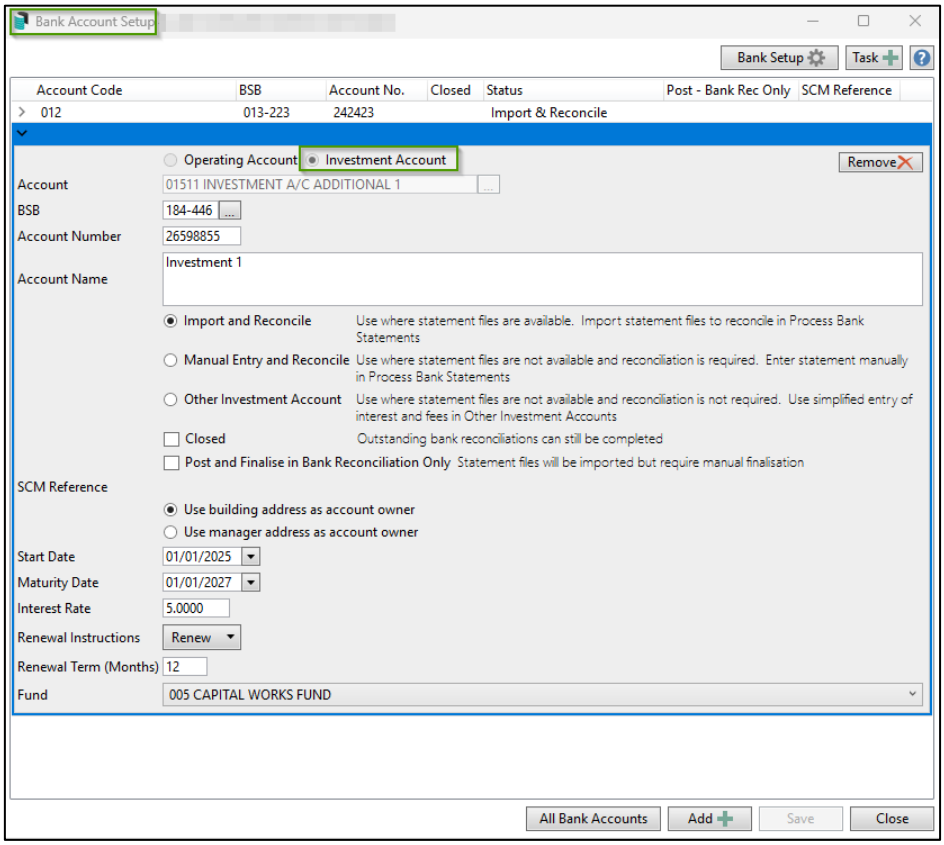
1. The amount of contributions levied to each fund of the Owners' Corporation were:

Lot Number	Administrative Fund	Capital Works Fund	Other
3	0.00	0.00	16.50
4	0.00	0.00	16.50
5	0.00	0.00	8.89
8	0.00	0.00	1.04
23	0.00	0.00	16.50
28	0.00	0.00	7.70
84	0.00	0.00	17.86
Totals	0.00	0.00	84.99

2. The amount of contributions paid to each fund of the Owners' Corporation were:

Lot Number	Administrative Fund	Capital Works Fund	Other
2	1,624.00	660.80	0.00
5	2,363.79	1,416.10	64.92
8	2,204.88	1,320.90	10.72
9	1,435.50	584.10	0.00
10	1,000.00	0.00	0.00
11	1,392.00	566.40	0.00
12	1,856.00	755.20	0.00
14	1,508.40	613.60	0.00
15	1,508.00	613.60	0.00
19	1,464.50	595.90	0.00
21	1,624.00	660.80	35.00
23	0.00	0.00	16.50
24	1,403.60	566.40	0.00
28	2,718.89	281.11	0.00
31	1,638.50	666.70	0.00
33	1,508.00	613.60	0.26
41	1,464.50	595.90	0.16
45	1,479.00	601.80	0.00
47	1,740.00	708.00	0.00
48	1,566.00	637.20	0.00
50	633.80	684.40	0.00
53	1,493.50	607.70	0.00
54	1,696.50	690.30	0.00
59	722.40	377.60	0.00
60	1,609.50	654.90	0.00
64	1,740.00	708.00	0.00
67	1,624.00	660.80	0.00
69	1,624.00	660.80	0.00
71	1,682.00	684.40	0.00

Important Note – Section 9 of the report (Investment Accounts) will only display accounts configured only within Bank Account Setup. If investment funds are currently configured only within Split Bank Setup, they must be added to Bank Account Setup to appear correctly in this section of the new report.



What's Better

- Report Distribution – Generating Ledger Card for 'Month to Date' and 'Date range', for Lot with zero data was causing an error. This has been resolved.
- Report Distribution - Ledger card search All History is now displaying debits and credits in the Balance brought forward
- Report Distribution – Ledger card configuration Style All History, is now displaying debits and credits in the Balance brought forward
- Report Distribution Levy Generation Schedule - 'Struck Not Generated' text has been updated to 'Approved Not Generated' on the report.
- Report Distribution - When emailing reports to Internal users, if Post is disabled the number of Printed pages is no longer appearing on the preview screen
- Roll Datalinks - Subgroups can now be linked to lots in the Main building where the account codes are different, without error.
- Code Change Number - If there was a Management Fee Setup active to a default expense code and a Change Code Number was carried out on the default expense code the system was crashing. This has now been resolved if a Code Change is finalised then it will now change the code number and update the record the Management Fees setup to the new code number.
- Report Distribution Printing - Building number added to print job from report distribution.
- File -Based Report configurations – Enhancements have been made to move remaining File-Based report configurations to database
- Searches - Improvements have been carried out to improve the performance of searches especially that some work queue searches could be faster, but it depends on the restrictions
- Invoice Hub - All Invoices are not Retracted after deactivating the Invoice Hub for a Building