Release Notes – Version 5.6.160

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

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What's New

1. Account Selection

Account selection will now prevent accounts with system flags other than None, Overdue Interest, Rounding Adjustment, Other Sub Account, Tax Creditor from being selected.

This will impact account selection in the following areas

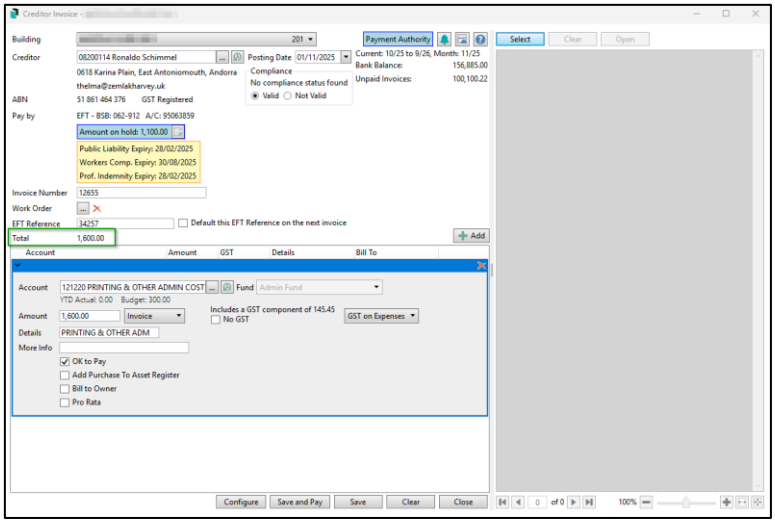
- Deposit Form
- Bank Reconciliation - Create Receipt
- Receipt Entry
- Account Maintenance (Update Codes)
- Change Account Code
- Levy Invoice Code Setup
- Manager Invoice Code Setup
- Opening Balances
- Trading Fund Setup
- Bank Account Setup (Bank Account)
- Bank Reconciliation (Allocate)
- Periodic Payments
- Building Info - Tax Setup (PAYG Instalment)
- Creditor Invoices Edit (new) (from Local/Global Transactions) - Add Pro Rata, Account
- Creditor Invoices (new) - Bill To Owner income, Creditor Invoice expense, pro rata
- Creditor Balance
- Scheduled Creditor Invoice
- Debtor Invoice Edit (new)
- Debtor Invoice (new)
- Scheduled Debtor Invoice (new)
- Journal Prep (with auto reverse ticked)
- Docmax - Invoice Line Items & Creditor Invoices (old) multi-line items
- Levies Arrears Fee Setup
- Pay Employees
- Creditor Invoices Edit (old) (from Local/Global Transactions)
- Edit Transactions (From Local/Global Transactions)
- Creditor Invoices (Old)
- Invoice Entry (old)

2. Creditor Invoices (Preview) – User Interface alignments

In the new Creditor Invoice user interface, the 'Total' amount displayed in creditor invoice screens has been repositioned to align to the left. This enhancement improves visibility and provides a more consistent focal point when reviewing and approving invoices, helping users quickly confirm invoice totals without needing to scan across multiple areas of the screen.

This alignment update applies to the following areas:

- Creditor Invoice (Preview)
- Creditor Invoice Workqueues
- Scheduled Creditor Invoices



3. Notifications – Legacy Creditor Invoices and Arrears Notices

From 1st October, the legacy Creditor Invoices and Arrears Notice modules will be retired. To ensure users are informed ahead of this change, notification alerts have been added to the legacy modules when users select the module. These alerts advise users that the selected module is scheduled for removal and direct them to the relevant replacement functionality.

The following notifications will display when users select the legacy modules:

 Creditor Invoices Arrears Notice	**Creditor Invoices Old – Message added** Creditor Invoices has moved to Creditor Invoices (Preview). This icon will be retired soon. For a more automated workflow, we recommend using Creditor Invoice Work Queues. Would you like to learn more? https://smhelp.stratamax.com/help/creditor-invoice-work-queues **Arrears Notice Old – Message added** Levy Arrears has moved to Levy Management. This icon will be retired soon. Would you like to learn more? https://smhelp.stratamax.com/help/arrears-process-new

Please Note – If the notification is not dismissed, the notification will expire in an hour

4. Levy Arrears - Split Levy Setup

4.1 Overview

The Levy Arrears module now honours the fund allocation configured in Split Levy Setup when generating and distributing arrears notices. This provides greater accuracy in arrears communications where levy notices are split between owners, agents, or other recipients.

4.2 Levy Arrears Split Notice

Arrears notices will now be produced according to the fund-specific recipient configuration defined in Split Levy Setup. Different recipients can receive notices relating only to the funds for which they are responsible.

For example, if Split Levy Setup is configured so that an Agent receives notices for the Sinking Fund:

- An Owner arrears notice will be generated showing Administration Fund charges, applicable arrears fees and other charges.
- An Agent arrears notice will be generated showing Sinking Fund charges only.

As a result, two separate arrears notices will be produced for the account, each containing the relevant fund information for that recipient.

Please see Levy Management | Online Help - Split Levy Setup for more information regarding setting up split notices by fund.

5. Search and Export Enhancements

Several searches have been enhanced to improve visibility of date and time information and provide more accurate sorting when exporting results to Excel.

5.1 New – 'Added Date and Time' Column in DocMax

A new column titled 'Added Date and Time' has been added to DocMax Work Queues, Advanced and Save Searches. The 'Added Date and Time' field is a column only which can be sorted but cannot be restricted when searching.

Along with the new 'Added Date and Time' column in DocMax, other search Date/Time fields have been updated to allow time stamps to be visible when exported to excel and appear in the correct format. This will allow Date/Time columns in excel to sort correctly.

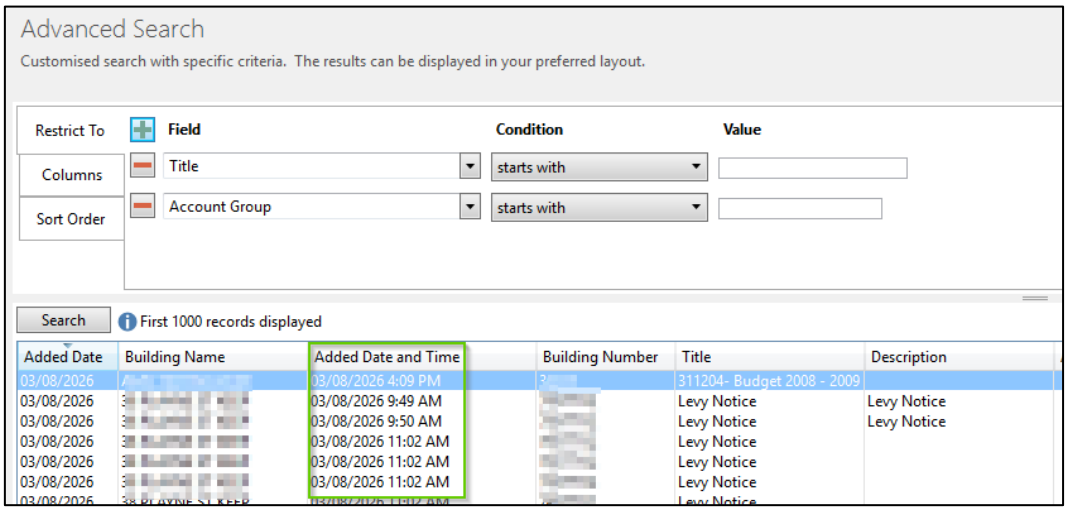
5.2 Updated Areas

The following screens have been updated:

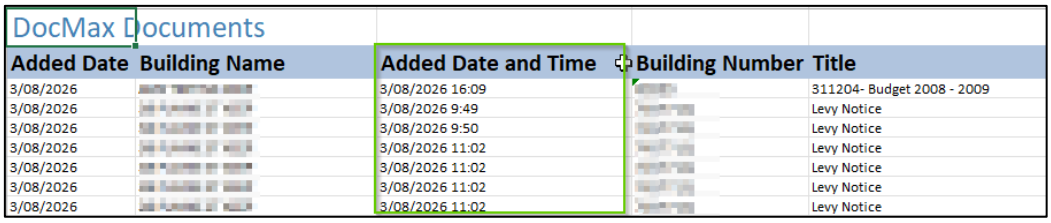
- DocMax Advanced and Save searches
- Work queues - New 'Added Date and Time' column
- Search Tasks – created field
- Log Viewer – Date/time field
- Search Communication logs Email Log – Date/time field
- Search Building Info History – Change date field
- Report Distribution Log - Start Date/Time, Finished (time stamp added) fields

5.2.1 DocMax – Advanced Search

1. Navigate to DocMax
2. Select Documents, Advanced search
3. Select Columns, add new 'Added Date and Time'

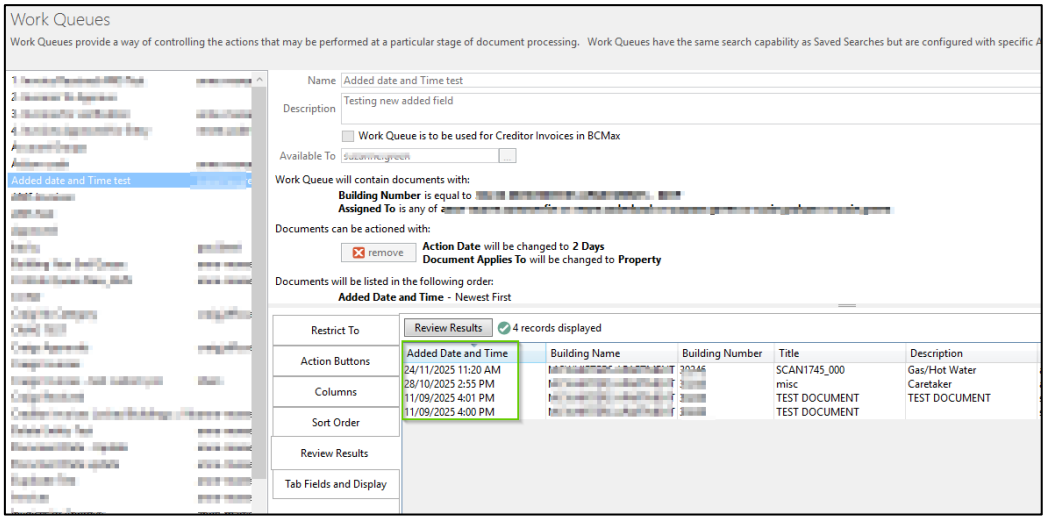


4. Create Excel Report



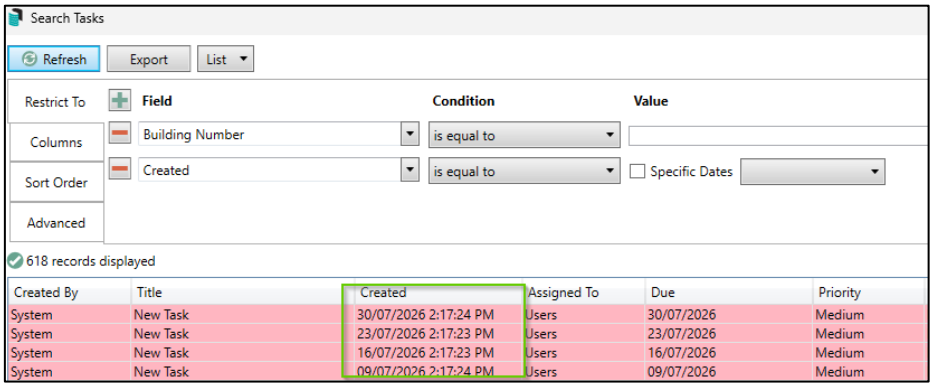
5.2.2 DocMax - Administration

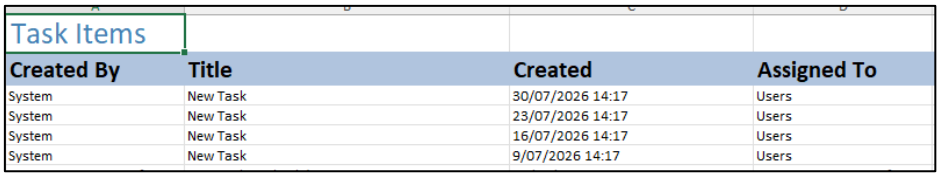
1. Navigate to DocMax
2. Select Administration
3. Select Work queues
4. Select a Work queue to edit
5. Added 'Added Date and Time' to the grid
6. Review Results



5.2.3 Search Tasks

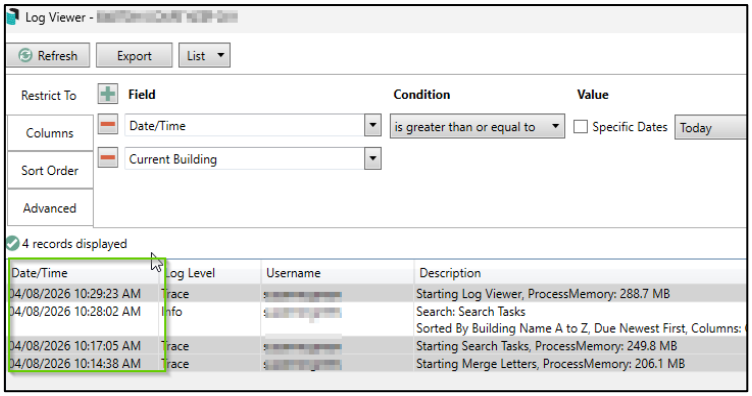
1. Navigate to Search Tasks
2. Columns, add Created field
3. Export to Excel

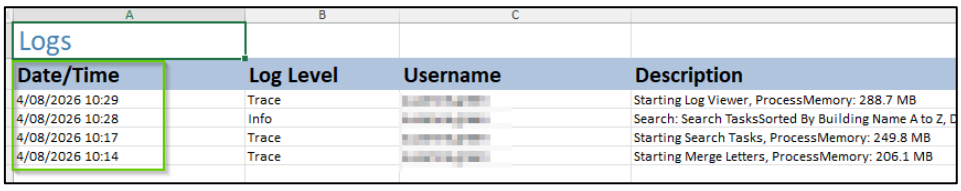




5.2.4 Log Viewer

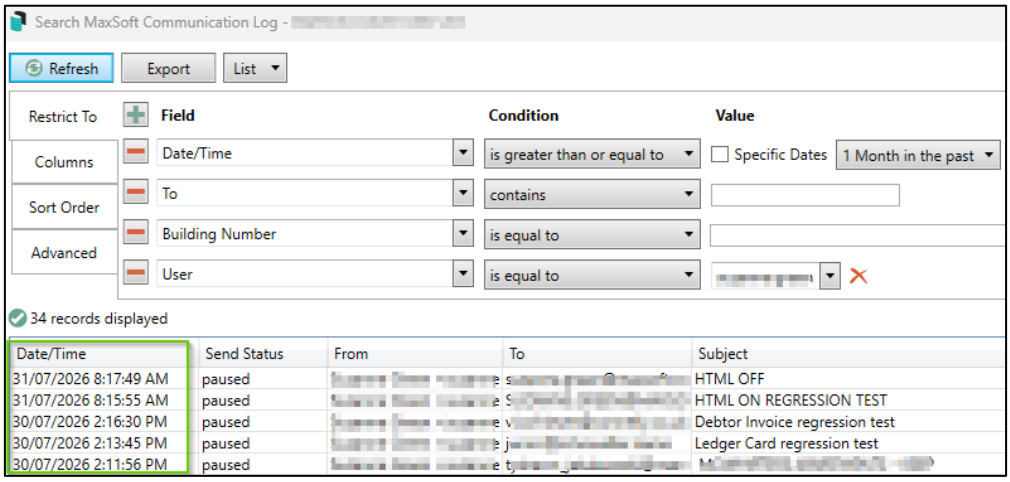
1. Navigate to Log Viewer
2. Columns, add Date/Time field
3. Export to Excel

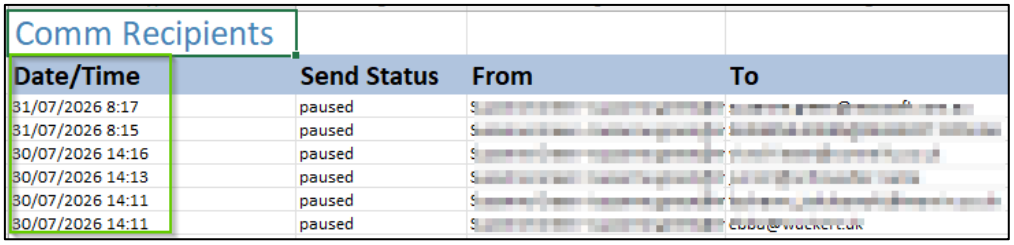




5.2.5 Search Communication Log

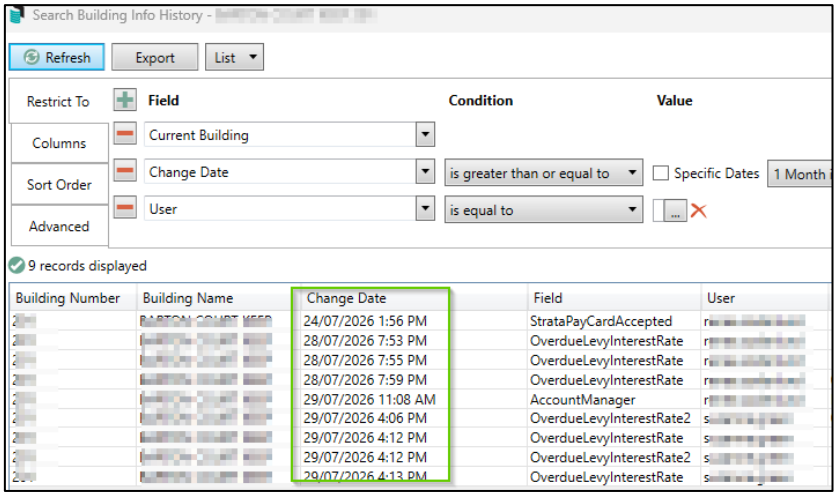
1. Navigate to Communication
2. File, select Search Logs (Date/Time field defaults)
3. Search results and Export

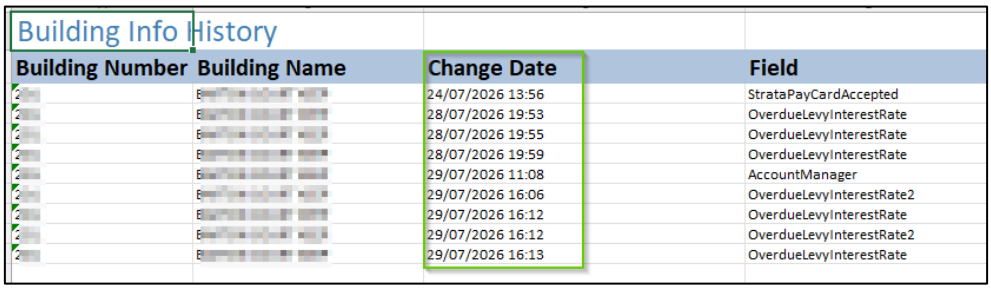




5.2.6 Search Building Info History

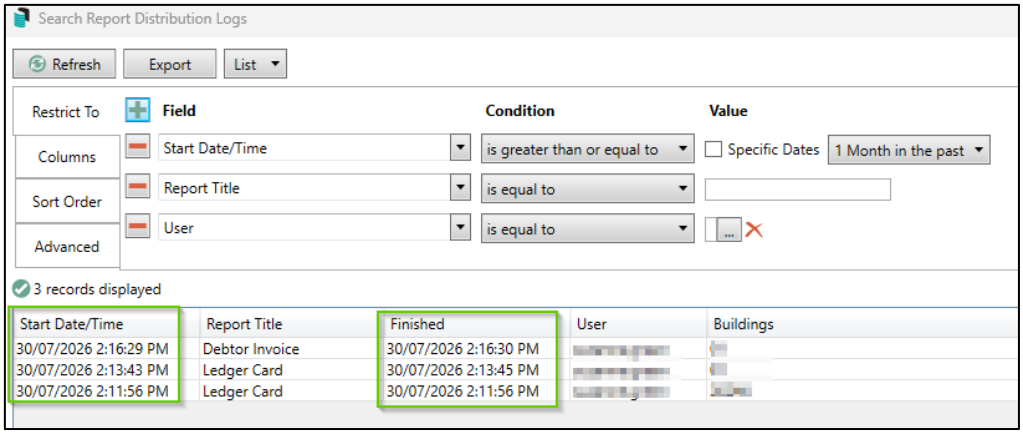
1. Navigate to Search Building Info History
2. Change Date field defaults
3. Export

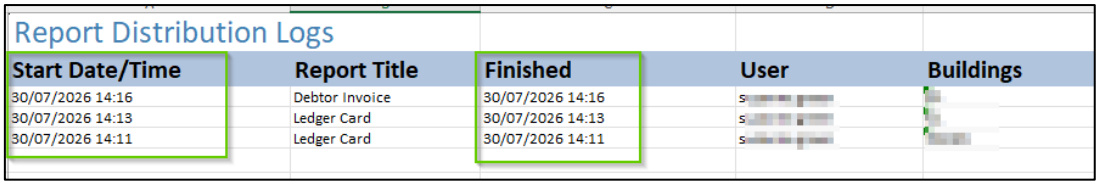




5.2.7 Report Distribution log

1. Navigate to Merge Letters
2. Untick Merge Letters only, select cancel
3. Select log
4. Columns, add Finished field (Start Date/time will default)
5. Export





Please Note – Existing searches, reports and work queues will continue to operate as normal. Users can optionally add the new Date and Time column where available and will benefit automatically and will benefit from the improved date/time formatting in exported Excel reports.

6. BCMax Desktop Search Enhancements

The BCMax Desktop Search has been enhanced to return a greater number of matching menu options, making it easier and faster for users to locate modules within StrataMax. These improvements increase visibility of available modules and reduces the need for multiple searches,

6.1 Menu Search Improvements

- Increased maximum search results from 10 to 45 menu options
- Search results are displayed across up to three columns to improve readability and usability
- The search results layout automatically adjusts based on the number of matches returned:

    - 1 to 15 results – Single column display
    - 16 to 30 results – Two column display
    - 31 to 45 results - Three column display

- Results are sorted alphabetically to assist with navigation
- Menu options the user has permission to access are prioritised and displayed ahead of inaccessible or disabled options
- Existing synonym-based search functionality remains supported
- Duplicated search results have been removed.

6.2 Scope of Change

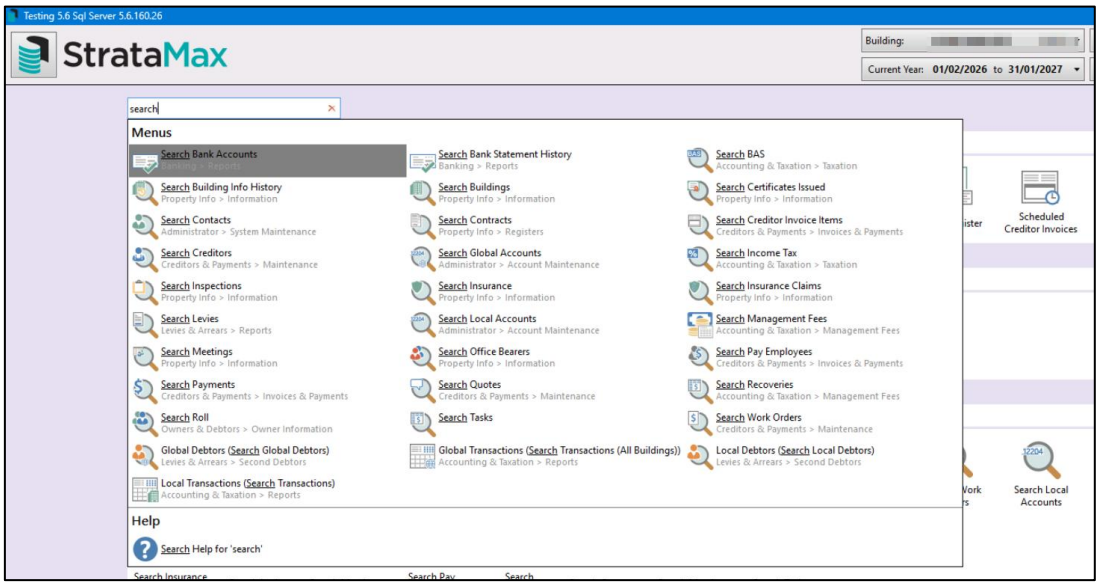
These enhancements apply only to the 'Menu Search 'field within BCMax Desktop.

The following functionality is unaffected:

- Searches accessed via the search button in the top-left corner of the desktop via the StrataMax Logo
- Debtor, creditor, and other record-based search functions.

Example

The following example demonstrates the expanded search results displayed, showing up to three columns of matching menu options for improved navigation and visibility



7. Levy Management / Levy Arrears Disbursements

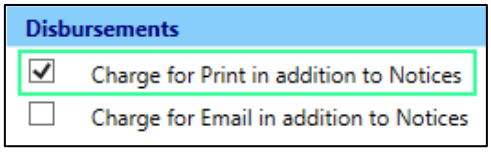
7.1 Overview

Two new configuration options have been added to the Global Levy Notice Configuration to simplify notice distribution disbursement processing. This will provide greater flexibility when applying charges for printed and emailed levy and arrears notices from the Levy Management and Levy Arrears modules.

7.2 New Disbursement Configuration Options

7.2.1 Charge for Print in Addition to Notices

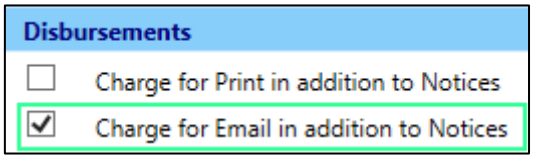
This new configuration setting allows users to determine whether a printing disbursement charge should be raised when a levy or arrears notice is issued by post.



- When enabled, a charge for printing will be raised in addition to the Levy Notice Issued disbursement.
- When disabled, no printing charge will be raised.

7.2.2 Charge for Email in Addition to Notices

This new configuration setting allows users to determine whether an email disbursement charge should be raised when a levy or arrears notice is issued by email.



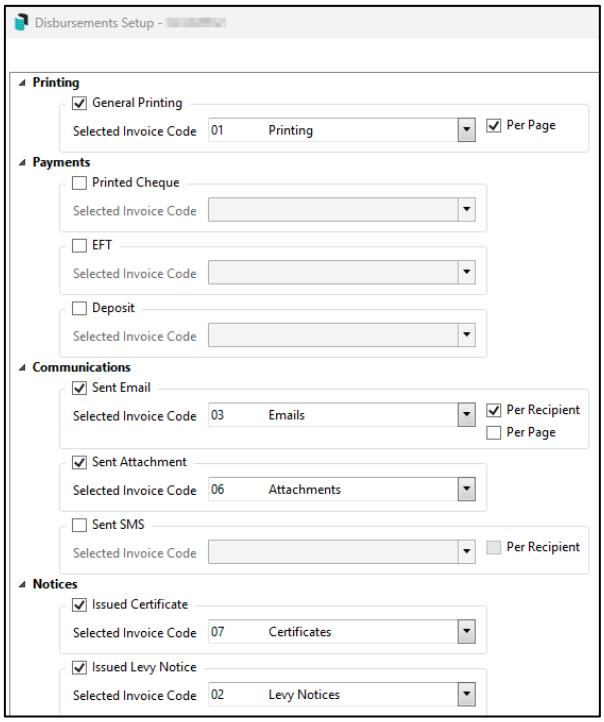
- When enabled, a charge for email delivery will be raised in addition to the Levy Notice Issued disbursement.
- When disabled, no email charge will be raised.

7.2.3 Dependencies

The new settings are dependent on existing disbursement configuration rules.

For example:

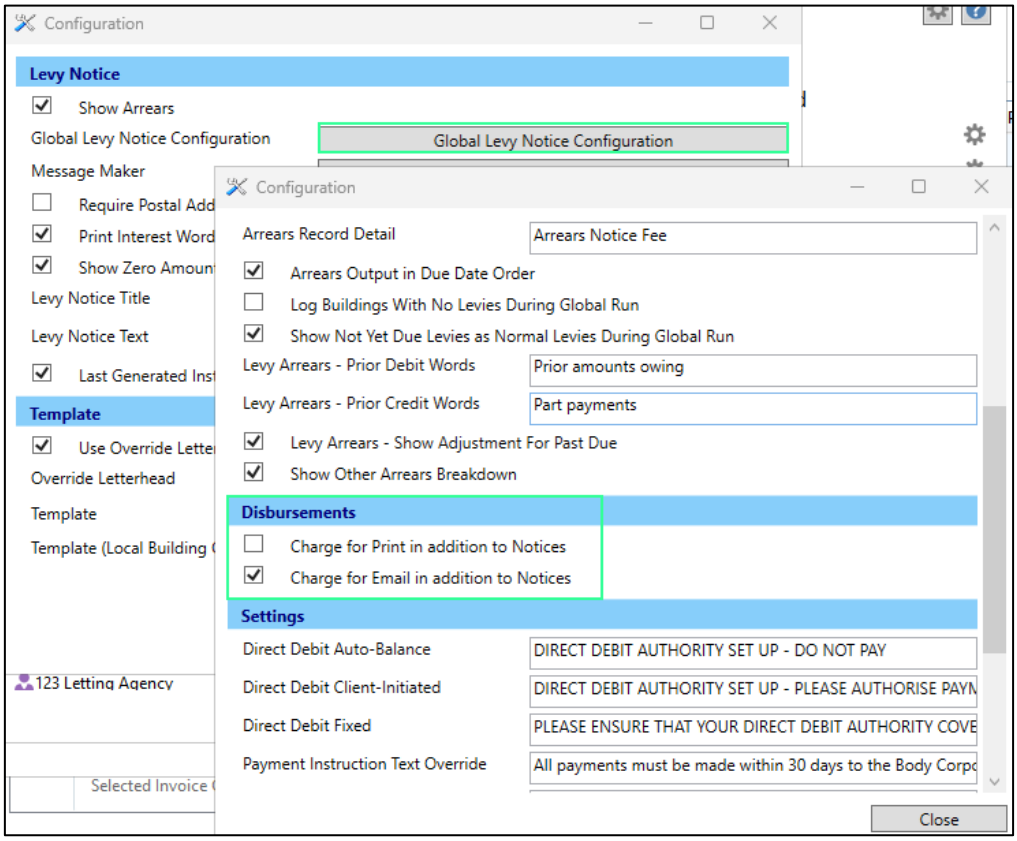
- If the Levy Notices Issued disbursement has not been configured, no Levy Notice Issued charge will be raised.
- Related print or email charges will only be applied where the corresponding disbursement configuration exists, and the relevant option has been enabled.



7.3 Access and Usage

To view or update the new disbursement settings:

1. Navigate to Levy Management.
2. Select Reports.
3. Click Distribute Levies.
4. Select the Configuration (cog) icon.
5. Click Global Levy Notice Configuration.
6. Scroll to the Disbursements section.
7. Review or update the new configuration options



7.1 Scope of Change

The new settings will only apply to the new Levy Management and Levy Arrears modules.

Disbursement charges in old Levy Notices and Reports and Arrears Notices will not be impacted by this change.

8. Account Group Setup Enhancements – ABN Configuration

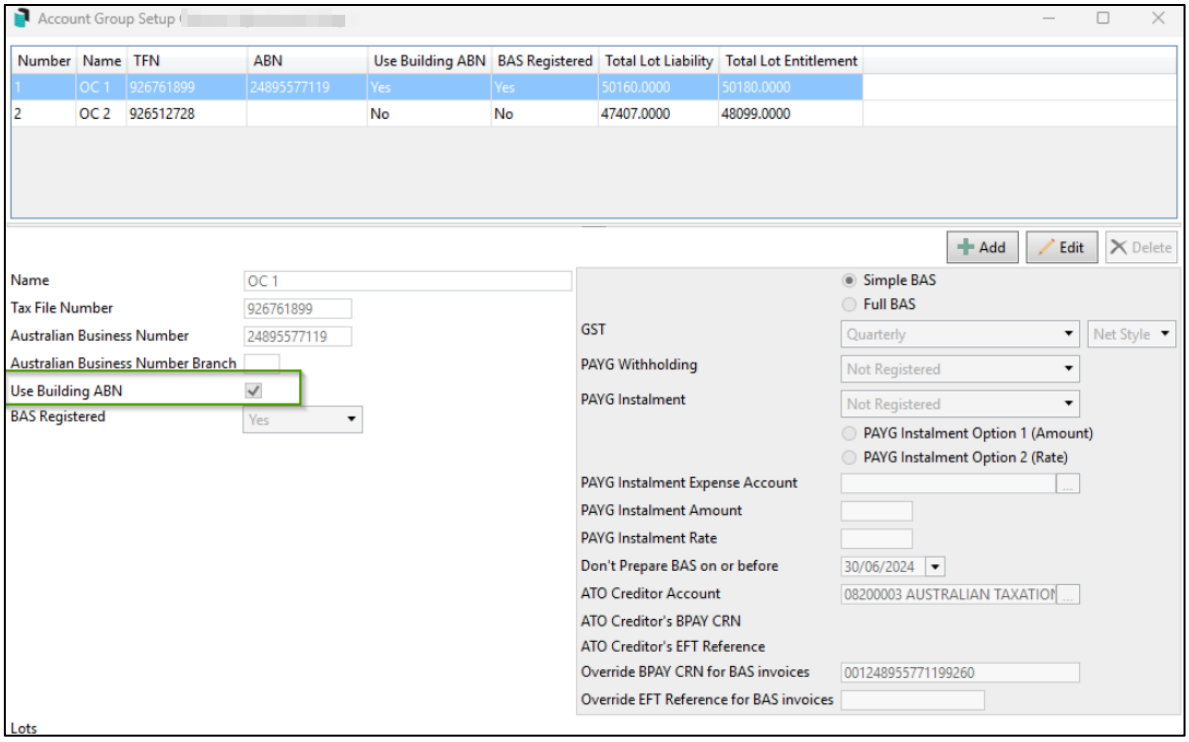
Account Groups in Account Group Setup can now be individually configured to use the Building ABN. This removes the previous restriction that automatically applied the Building ABN to Account Group 1 and provides greater flexibility for buildings with multiple account groups.

Key changes

- Removed the hard-coded rule that required Account Group 1 to use the Building ABN.
- Added a new 'Use Building ABN' checkbox in Account Group Setup.
- Users can now nominate which Account Groups should use the Building ABN.
- Supports buildings operating multiple account groups with different GST and ABN requirements.
- Additional validation has been added to help ensure ABN information is entered correctly and meets BAS registration requirements.

Navigate to Account Group Setup and select an Account Group to see the new setting.

Example: New configuration setting in Account Group Setup



These enhancements ensure Levy Notices and Arrears Notices can support a combination of the following Account Group ABN and GST configurations:

- Account Groups that use the Building ABN.
- Account Groups that use their own ABN.
- Account Groups that are not registered for GST.

Please Note – The default for the new setting "Use Building ABN" will be off unless it matches the Building ABN prior to update to this version

9. New API Endpoints - Inspections

Two new API endpoints have been added to retrieve inspection data.

- API added at /api/buildings/{buildingId}/Inspections – Retrieves data by building ID
- API added at /api/buildings/Inspections – Retrieves data for all buildings based on filter options.

See swagger for full usage.

What's Better

- New Levy Arrears - Improved validation and added validation to Minimum Amount Overdue and Arrears fee fields
- Creditor Compare – A reference constraint error was appearing when deleting a Creditor Account referenced from Bank Statements
- Levy Arrears Notices via Report Distribution - Interest text will no longer include an additional space character.
- Levy Arrears Notices via Report Distribution - If the Building Information has the Interest set to 0.00% or Blank, the Arrears Notice will no longer print with the Interest Details message.
- Building Information/Account Manager – When selecting an Account Manager and double-clicking a non-column section of the grid, the system would crash. This issue has now been resolved.
- Email Template - When generating an email remittance advice via EFT Manager, the email will now be formatted as HTML.
- Change Code Number - Clients can no longer perform a Change code if both codes have active bank accounts. Validation message "Current and New Codes both have a bank account' will display.
- Change Code - The Monthly Budget and Budget Report Setup items were referencing an invalid account code after a code change. This has been corrected.
- DocMax Work Queues/Creditor Invoice Work Queues - Custom properties when processing an Invoice via a Creditor Invoice Work Queue were being removed - This has been resolved
- Contact Position - When the position type is Second Debtor and the user has Second Debtor Maintenance permission the Debtor Maintenance window will now open and show the Second Debtor details.
- BMC Billing - GST Registered Building was not charging GST on expense codes set with GST Free tax code. This has now been corrected.