Release Notes – Version 5.6.162

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. Change Code Number – Clearing Account Codes

Account codes with the following system flags can now be selected in the Change Code Number module.

- GstGross
- PaygWithholdingTax
- GstClearing
- PaygInstalmentClearing

This change allows the system clearing accounts to be aligned with the Master Chart when buildings are transferred between managers where these account codes are different.

Note: System flags must match for code changes to be accepted. Code changes where the system flags are different will be prevented.

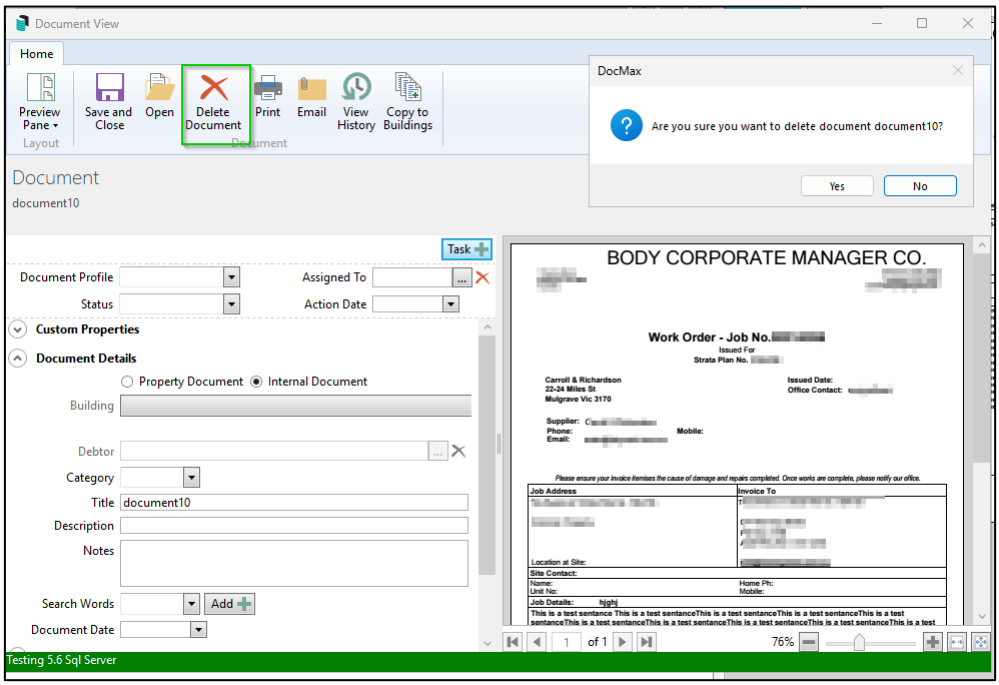
2. Creditor Invoice Work Queues

Users can now delete documents directly from Properties in Creditor Invoice Work Queues. Deleted documents are removed from both the work queue and DocMax.

When a document is deleted, the next document in the queue will automatically open, supporting a smoother review process.

Note: If a document cannot be deleted, a validation message will display. For example, deletion is not available where the document is attached to a scheduled creditor invoice.

1. Navigate to Creditor Invoice Work Queues
2. Creditor Invoice Work Queues
3. Select Start Queue
4. Select Properties
5. Select Delete Document



3. Preview Feature Changes

3.1 Overview

This release includes updates to the Preview Features configuration screen. Several features that were previously controlled through Preview Features have now been enabled as standard functionality and no longer require individual configuration. In addition, a new setting has been introduced for Label Printing to streamline access through Merge Letters.

3.2 Key Changes and Enhancements

3.2.1 Preview Features Configuration Changes

The following preview feature settings have been removed and are now enabled by default:

- **Owner Info Preview** – Removed from the User Preview Features configuration screen. The application will now automatically use the new Owner Info module.
- **Funds Management** – Removed from the User Preview Features configuration screen. The application will now automatically use the new Funds Management module.
- **Levy Arrears Notice to use Report Distribution** – Removed from the Global Preview Features configuration. This has now been enabled for all clients.

Access to the old Arrears Notices module is currently still available but will be removed in a future release.

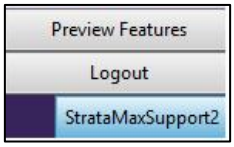
3.2.2 New Label Printing Configuration Setting - Label printing replacement (merge Letters)

A new Preview Features setting has been added for Label Printing called 'Label printing replacement (merge Letters). When enabled, Label Printing will open through Merge Letters by default. If the setting is not enabled, the old Label Printing modules will open.

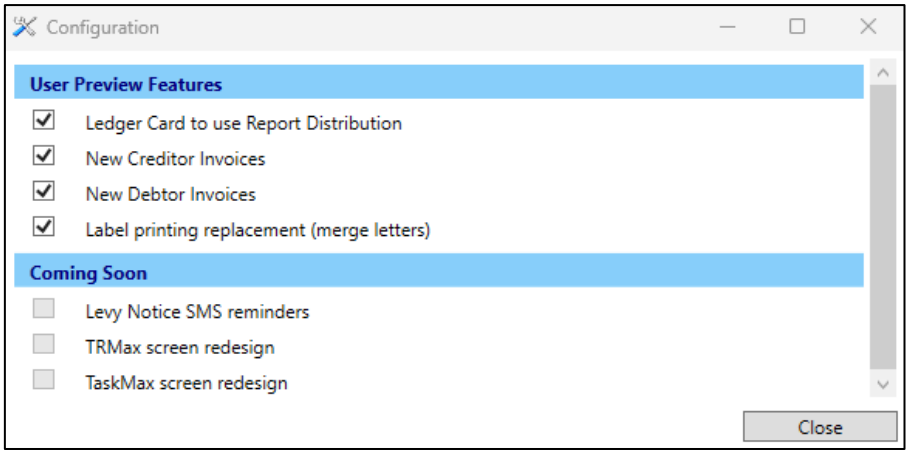
The new Label Printing setting affects the following menu items:

- Label Printing (Creditors)
- Label Printing (Debtors)
- Label Printing (Mortgagee)
- Label Printing (Mortgagee Reference)

To see the changes in the Preview Features screen, click the Account button in the bottom right of the BCMax desktop and select 'Preview Features.'



If security access to this option is enabled, the Preview Features configuration screen will be presented.



4. Arrears Manager – Global Export

4.1 Overview

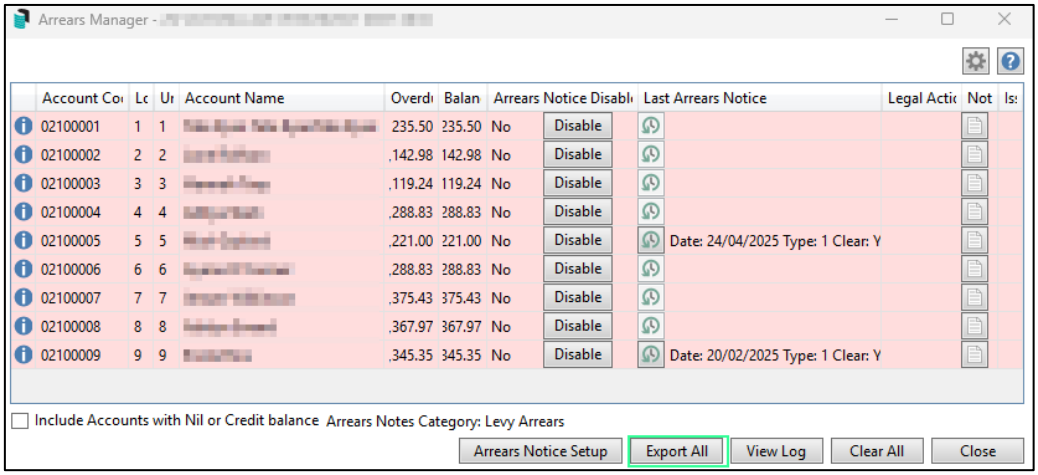
The Arrears Manager export functionality has been enhanced to provide greater flexibility when exporting data to Excel. Previously, the Export All option exported data only for the selected building. With this enhancement, users can now choose whether to export data for all buildings or only selected buildings through a building selection screen.

4.2 Key Changes

The Export All button will now open the building selector where all or a subset of buildings can be selected for export to Excel.

To see the change use the following steps:

1. Levy Management
2. Options
3. Arrears Manager
4. Click Export All



5. Tag required buildings
6. Click Select

Excel will open showing Arrears Manager data for selected buildings.

5. Creditor Invoice (Preview) Enhancements

5.1 Overview

This release introduces a range of enhancements across Creditor Invoices (Preview), Scheduled Creditor Invoices, and Creditor Invoice Work Queues. These improvements are designed to enhance usability, increase processing accuracy, and provide greater control over creditor selection and invoice entry workflows.

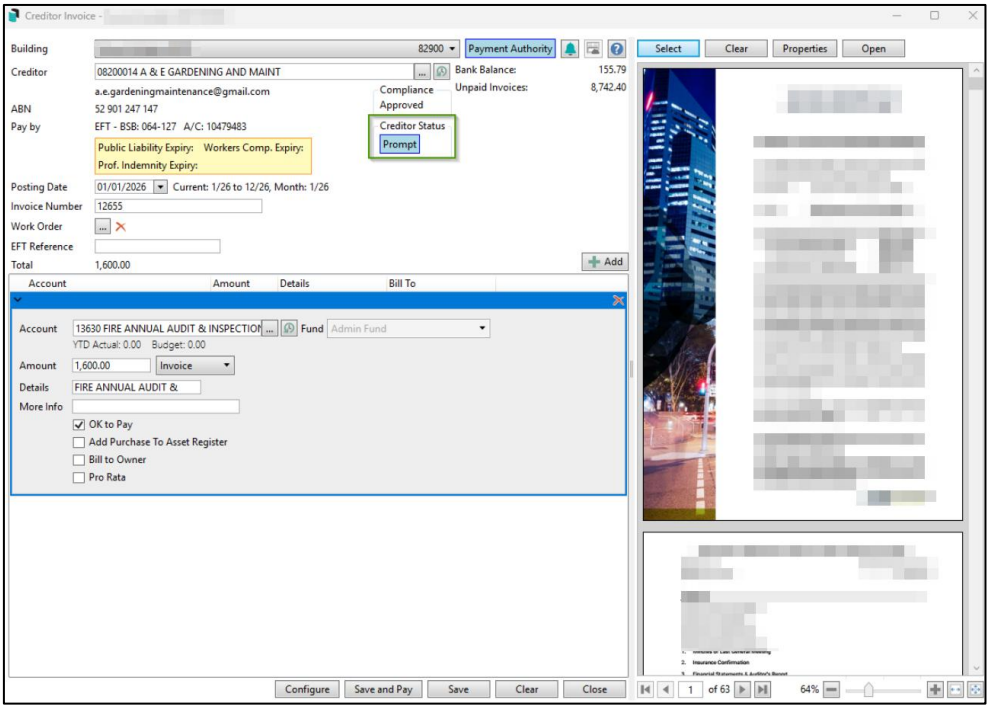
The changes streamline invoice processing, improve visibility of GST calculations, strengthen creditor compliance controls, and ensure application behaviour aligns more consistently with user configuration preferences.

5.2 Enhanced Creditor Compliance and Processing Controls

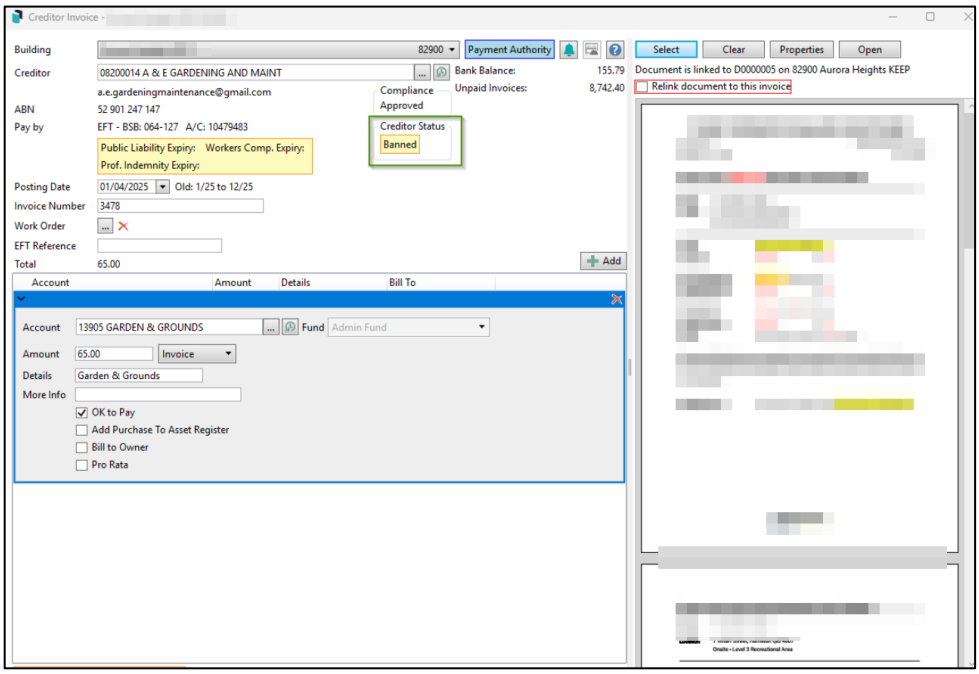
To support informed decision-making during invoice processing, creditor preference settings are now displayed directly within the invoice entry interface.

Key enhancements

- Prompt, Preferred, and Banned creditor statuses are now displayed in line with the settings configured in Creditor Maintenance for the selected creditor.



- Users are prevented from saving invoices against creditors marked as Banned.



- Creditor selection and invoice processing now provide improved transparency for users.

These changes strengthen governance over creditor usage and reduce the risk of invoices being processed against restricted suppliers.

5.2.1 Creditor Invoice Work Queues – Processing creditors with Prompt/Preferred/Banned settings

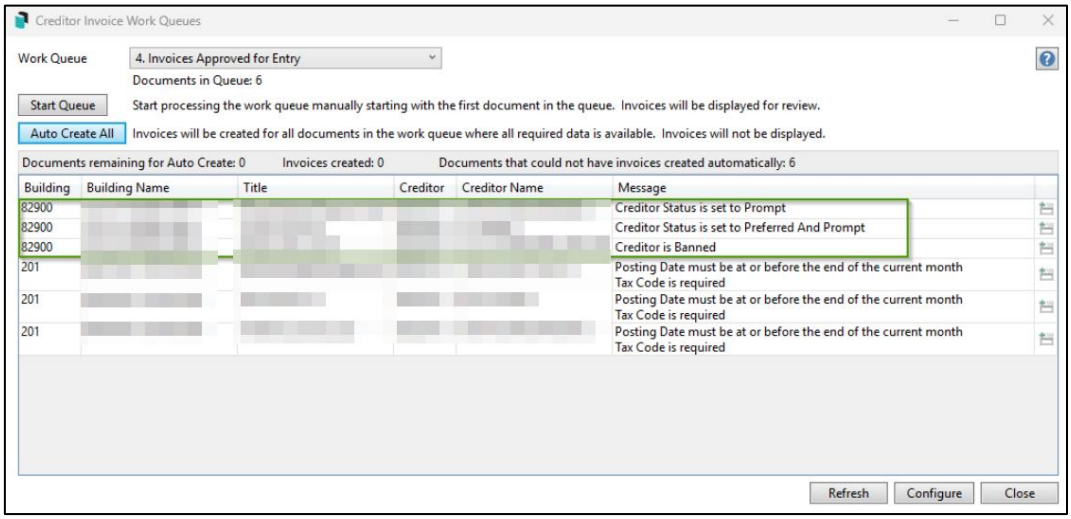
Creditor Invoice Work Queues now recognise creditor status when documents are processed automatically using 'Auto Create All'.

Documents linked to Creditors marked in Creditor Maintenance as:

- Banned
- Prompt
- Preferred and Prompt

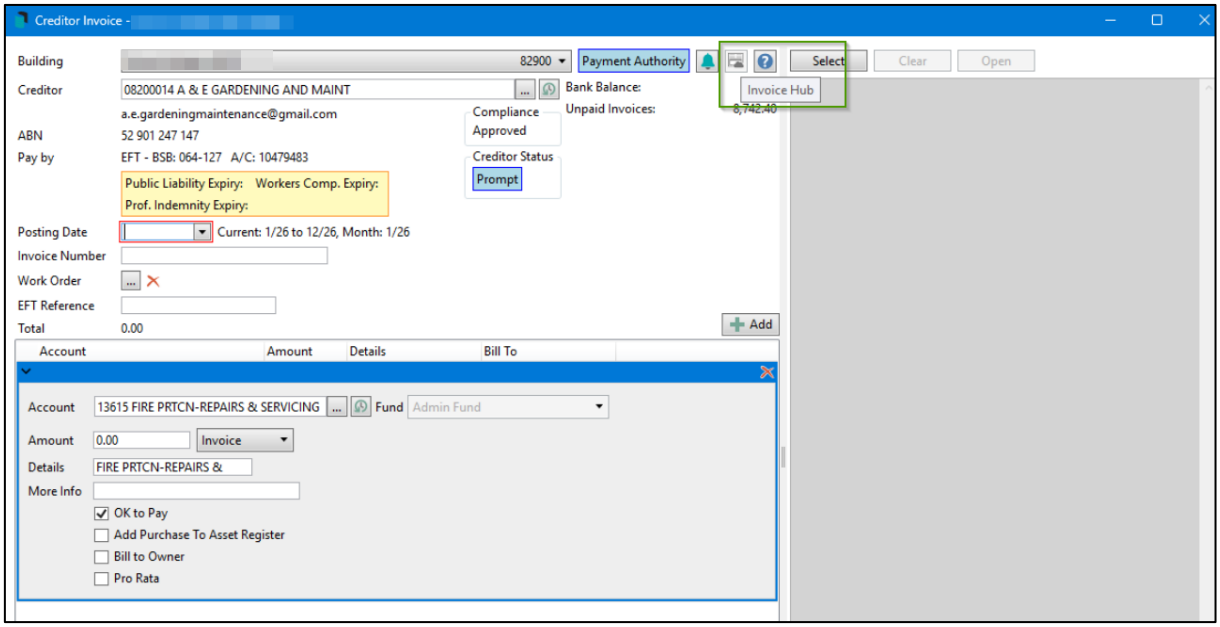
The system will no longer automatically process invoices in the queue where the linked creditor has one of these statuses. This ensures invoices requiring user review receive the appropriate attention before processing, supporting compliance and reducing processing risk.

Where invoices are not processed, the system will display a message once queue processing is complete, advising the user of the relevant reasoning why the invoice was not processed due to the creditor status.



5.2.1 Footnote Added to Disabled Invoice Hub icon

A tooltip is now available when Invoice Hub is disabled for a building. This alerts the user that the Invoice Hub option is not available for the selected building.



5.3 Improved GST Entry and Calculation

For GST Registered buildings. Invoice entry has been enhanced to provide greater visibility and accuracy when entering invoice amounts.

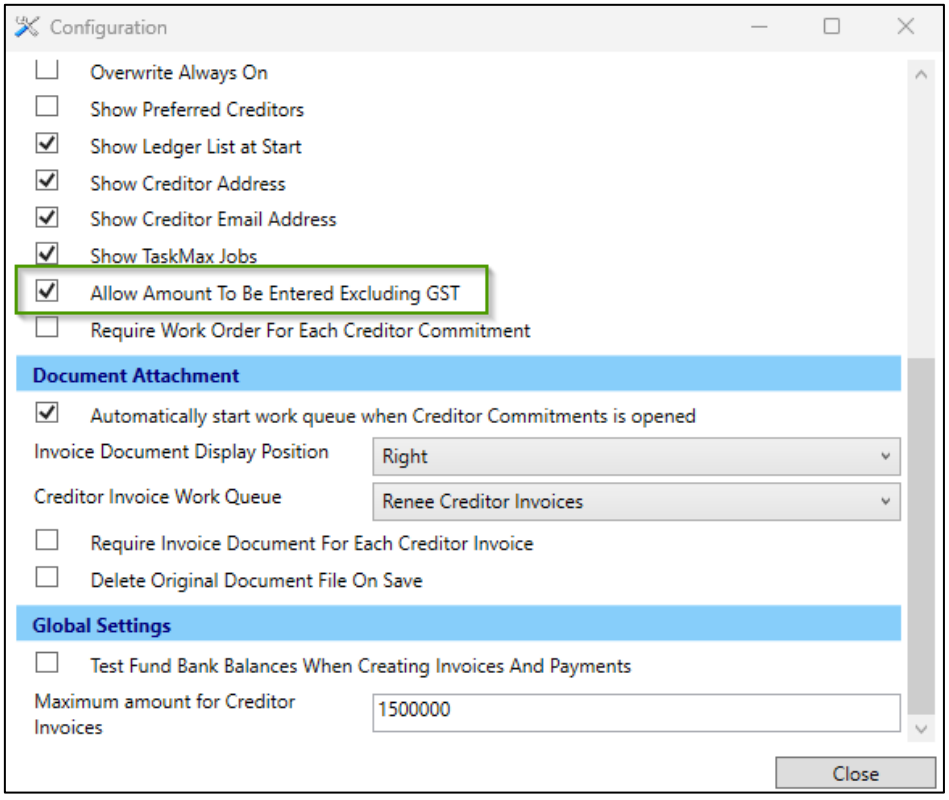
5.3.1 New Configuration setting – Allow Amount to be Entered Excluding GST

A new configuration setting has been introduced 'Allow Amount to be Entered Excluding GST' to the Creditor Invoice (Preview) configuration settings.

This new configuration if turned on will allow the user to enter the invoice amount as either GST Inclusive or GST Exclusive.

To access this configuration:

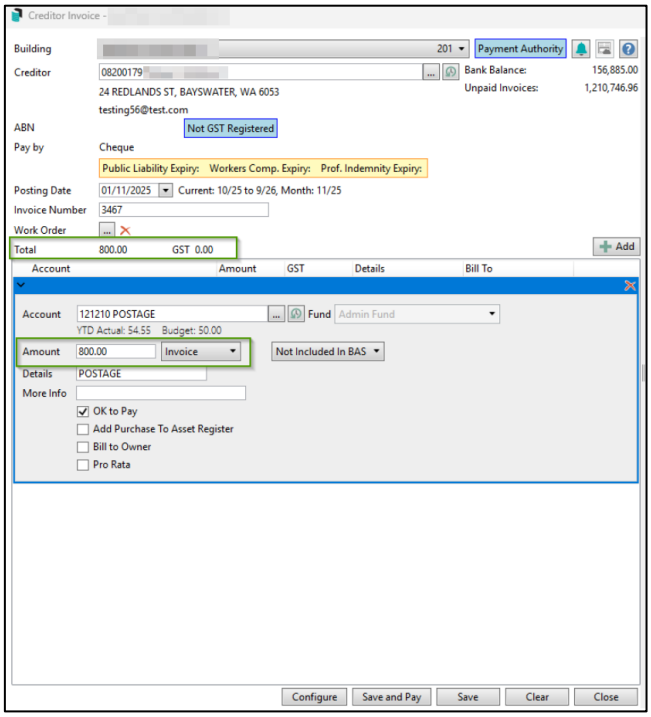
1. Navigate to Creditor Invoices (Preview)
2. Click on the Configuration option
3. New Configuration is available under Settings



Please Note – This is a user setting and will be turned on by default on upgrade.

5.3.2 GST Totals Displayed as a header

A new GST Total is now displayed at the top of the invoice section for GST Registered Buildings; this will improve visibility of GST values during data entry and also provides easier validation of invoice totals prior to saving the invoices.

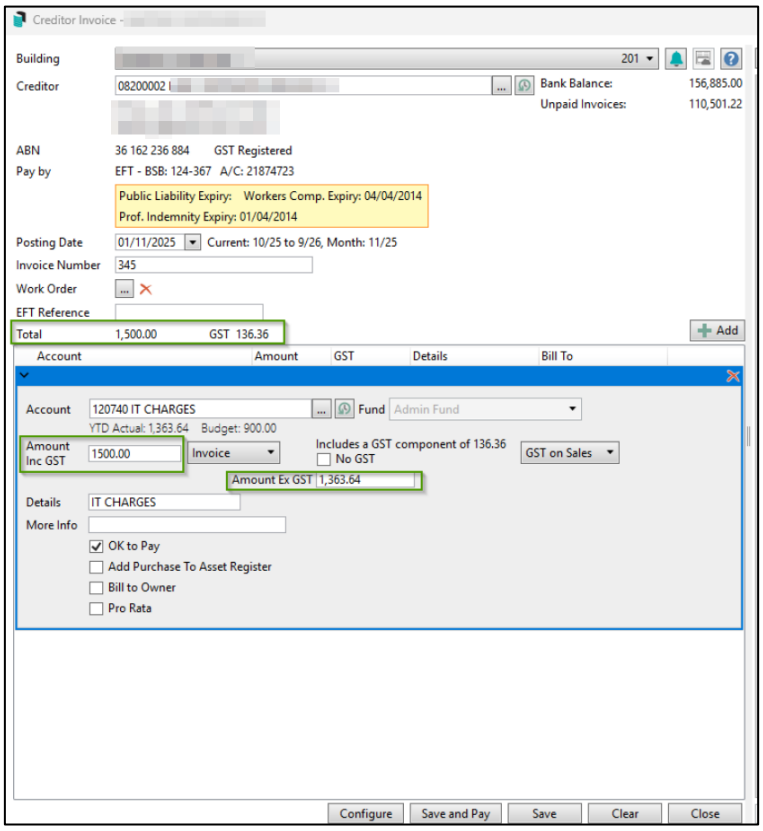


5.3.3 Clearer GST amount Entry

The invoice details section of Creditor Invoice (Preview), Scheduled Creditor Invoices and Creditor Work Queues has been redesigned to make GST- inclusive and GST- Exclusive values easier to understand and manage.

Key Enhancements:

- The existing Amount field is now labelled 'Amount Inc GST' when GST applies
- A new 'Amount Ex GST' field has been added beneath the 'Not GST' option
- Real-time calculations are now performed when:
  - Entering an 'Amount Inc GST' automatically calculates 'Amount Ex GST'
  - Entering an 'Amount Ex GST' automatically calculates 'Amount Inc GST'



These enhancements will reduce manual calculations, improve accuracy and speed up invoice entry for GST -Registered buildings.

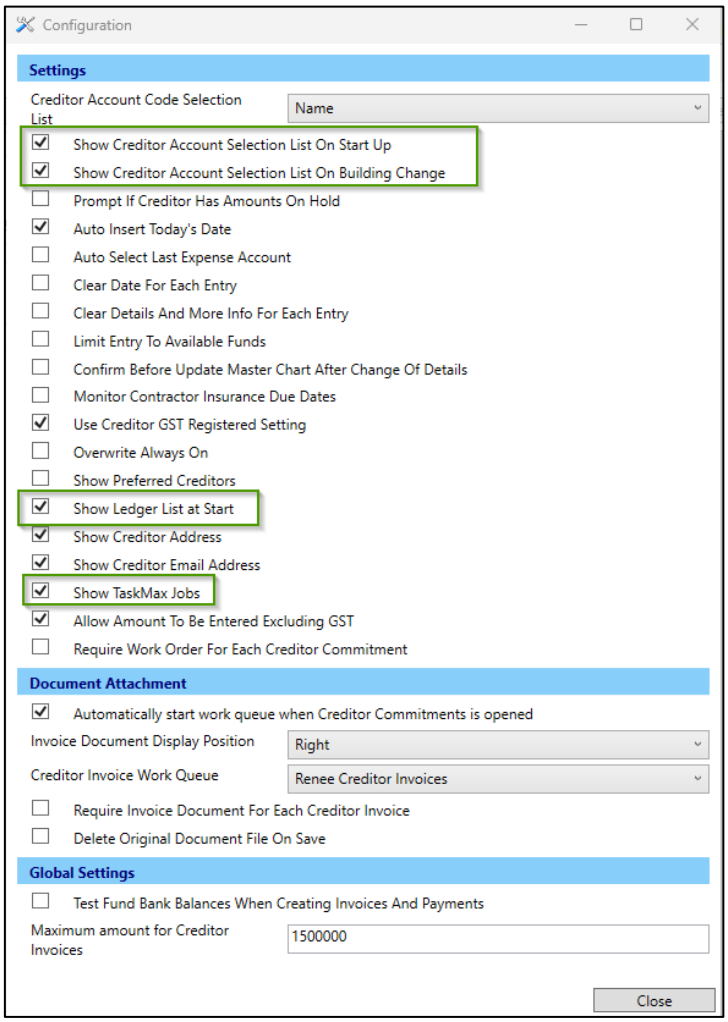
Please Note – If the New Configuration 'Allow Amount To Be Entered Excluding GST' is disabled the new fields will not be shown on the Creditor Invoice (Preview), Scheduled Creditor Invoices and Creditor Work Queues.

5.4 Creditor Invoice Configuration Enhancements

Creditor Invoices (Preview) will now more consistently follow user and global configuration settings when determining which selection lists appear during invoice entry,

The system depending on the configurations set will guide the users through invoice created based on configured preferences and will consistently respect the settings below:

- Creditor Selection (Show Creditor Account Selection on Start Up)
- Creditor History (Show Ledger List at Start)
- Item Account Selection (This is the Expense/Income code for selection which is driven by the Show Creditor Account Selection on Start Up)
- Work Order Selection (Show TaskMax Jobs)



The configurations apply when:

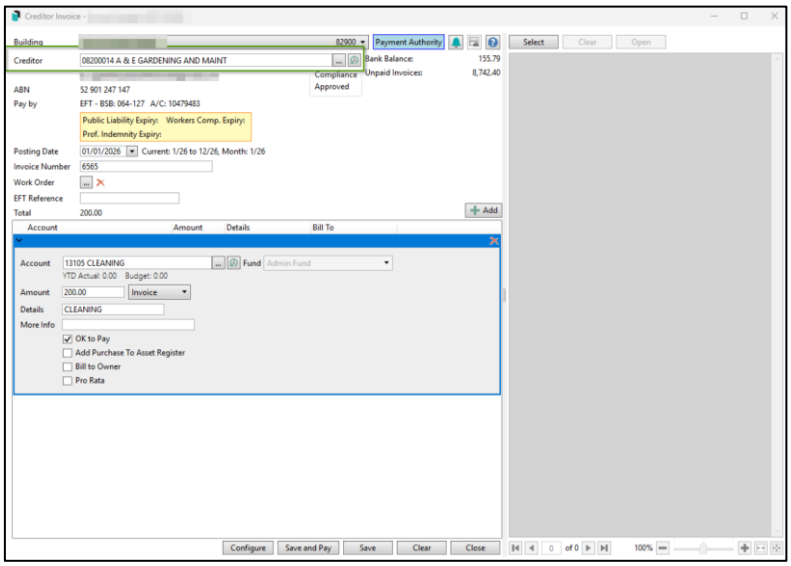
- Opening Creditor Invoice Preview directly
- Creating Invoices from DocMax
- Creating invoices from Creditor Invoice Work Queues
- Changing buildings within Creditor Invoices
- Selecting or Changing creditors

These enhancements to configurations will deliver more intuitive and consistent user experience while reducing unnecessary prompts and data entry steps.

5.5 Other Creditor Invoice improvements

5.5.1 Enhanced Creditor Selection

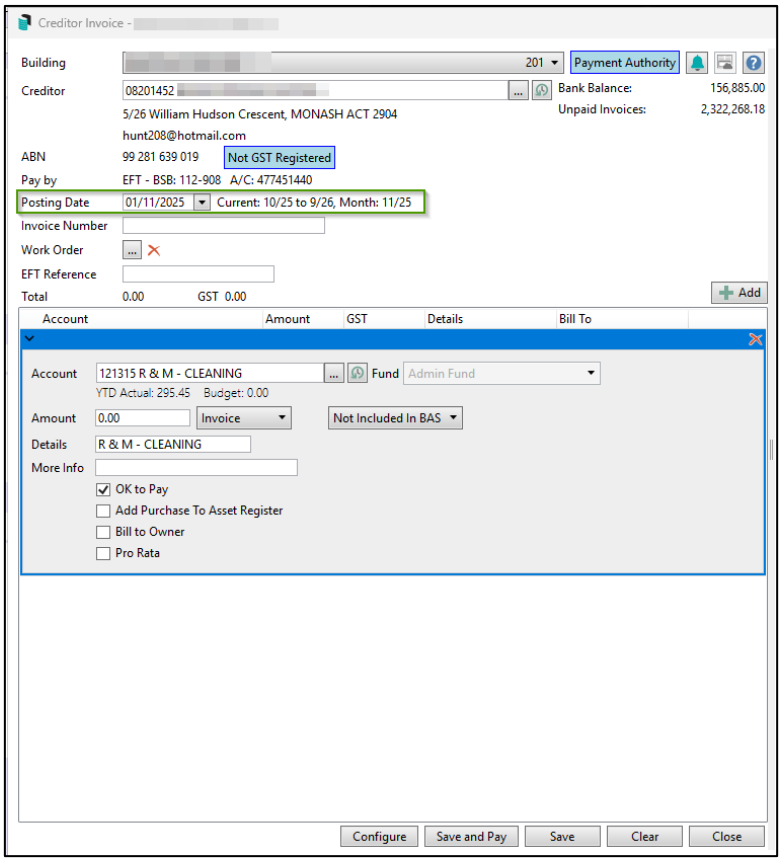
The creditor selection field has been widened, allowing more of the creditor name to be displayed without truncation



5.5.2 Posting Date and Posting Month

Posting Date and Posting month messaging has been relocated from beside the creditor selection to directly beneath the creditor details section.

This enables better visibility and better workflow on the User Interface.

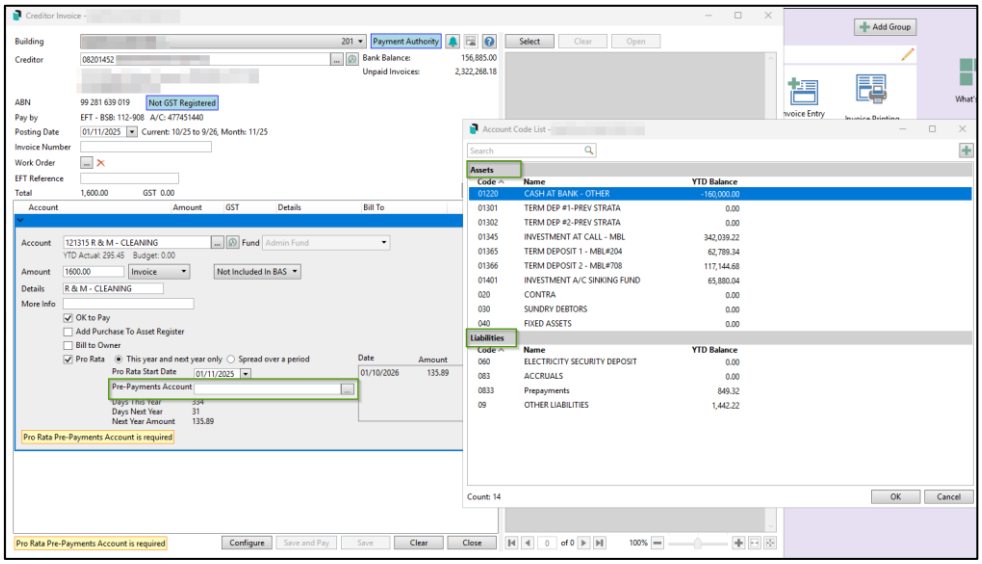


5.5.3 Expanded Account Selection for Pro-Rata Pre-Payments

The Pro Rata Pre-Payments Account functionality has been enhanced:

Users can now select either:

- Asset Accounts
- Liability Accounts



What's Better

- Levy Arrears - Levy Discount amounts will now output 0.00 in the Discount column when there is no discount amount.
- Levy Arrears Manager – Notes - The most recent note will now be displayed in correct order in Arrears Manager Notes column. Notes will no longer be combined where the previous note is quite short.
- Searches – when copying and pasting a building number into the building number field, the building selection list will now display. When copying and pasting into account selection fields, the account code list will now display.
- Creditor Invoice Work Queue - Was not processing merge fields if invoice details are entered through queue instead of DocMax. This has been corrected.
- Log Viewer - Log Viewer has been enhanced to improve the efficiency and accuracy of category logging.
- Account Selection Control - Account selection search filter delay issue where characters are sometimes missed has been resolved.
- General Configuration – Restricted the clickable area for checkboxes to reduce possibility of accidental selection.
- Business Activity Statement (BAS) – an error was occurring when loading BAS where T3 Varied rate was set. This has been resolved.
- Creditor Invoices (new) - edit tax code from Not on BAS to PAYG Wages or PAYG Tax Withheld was not triggering the transaction to appear on a BAS. This has now been resolved