Release Notes – Version 5.6.163

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

What's New 3
1. Debtor Invoices – Due Date Update Enhancement 3
1.1 Overview *3*
1.2 Key Enhancements *3*
1.3 Button Display and Save Behaviours *3*
2. Security – Disbursements 4
3. Multi-Factor Authentication 6
4. BAS – PAYG Instalment Reporting Improvements 7
4.1 Overview *7*
4.2 Key Improvements *7*
5. Levy Arrears Enhancements 8
5.1 Overview *8*
5.2 Key improvements *8*
5.3 Levy Arrears Preview Feature *9*
5.4 Credit Arrears Fees *10*
5.5 Levy Arrears Configuration Enhancements (Global Levy Notice Configuration) *11*
5.6 Levy Management and Levy Arrears Configuration Enhancements (Levy Arrears Configuration – Print Message) *12*
5.7 Arrears Manager – Process Fees and Logs *14*
6. Task Management Enhancements 15
6.1 Overview *15*
6.2 Key Features and Enhancements *15*
6.3 Automations *16*
6.4 Child Tasks *19*
6.5 Clone Automation *23*
6.6 Task Templates *24*
6.7 Task Management Security Permissions *28*
7. SMS – Only Distribution for Levy Arrears Notices 28
7.1 Overview *28*
7.2 Key Enhancements *29*
What's Better 30

What's New

1. Debtor Invoices – Due Date Update Enhancement

1.1 Overview

A new Due Date update feature has been introduced to the Debtor Invoice Edit screen to make it easier for users to update payment terms when reviewing, editing, or reprinting debtor invoices.

Users can select the 'Update to [Date]' button to automatically recalculate and apply the invoice Due Date based on the configured payment term settings. This reduces the need for manual date entry and helps ensure Due Dates are applied consistently across debtor invoices.

1.2 Key Enhancements

The Due Date update option is available in Debtor Invoice Edit when accessed from Local Transactions, Global Transactions, Local Debtors and Global Debtors. This provides users with a consistent way to review and update invoice payment terms across the main debtor invoice entry points.

When selected, the option automatically recalculates the invoice Due Date using the configured Invoice Notice Pay Days settings. The calculation applies local settings first, then global settings, and defaults to 14 days where no configuration exists.

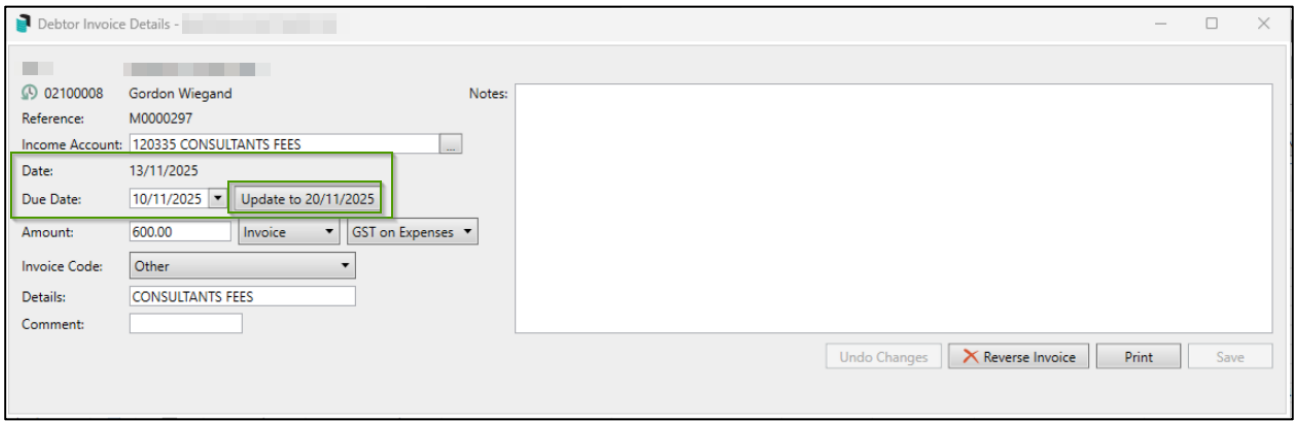
The calculated Due Date is displayed directly on the 'Update to [Date]' button for easy reference, helping users confirm the proposed date before applying it. This supports alignment between invoice payment terms, system configuration, and business rules.

1.3 Button Display and Save Behaviours

The 'Update to [Date]' button is only displayed when the user has permission to edit the invoice Due Date and the current Due Date is different from the system-calculated default Due Date.

Once selected, the button updates the invoice Due Date to the calculated value. The invoice must then be saved for the updated Due Date to be retained.

Example of the new Update to [Date] option



This enhancement reduces the amount of manual entry required when editing or reprinting invoices and helps ensure payment terms are applied consistently across debtor invoices.

By calculating and applying the appropriate Due Date from configured settings, the feature minimises the risk of incorrect Due Dates being used and supports a more streamlined invoice maintenance process for users.

Please Note – Users can still manually enter a different Due Date if required, even when the 'Update to [Date]' option displays a calculated date.

2. Security – Disbursements

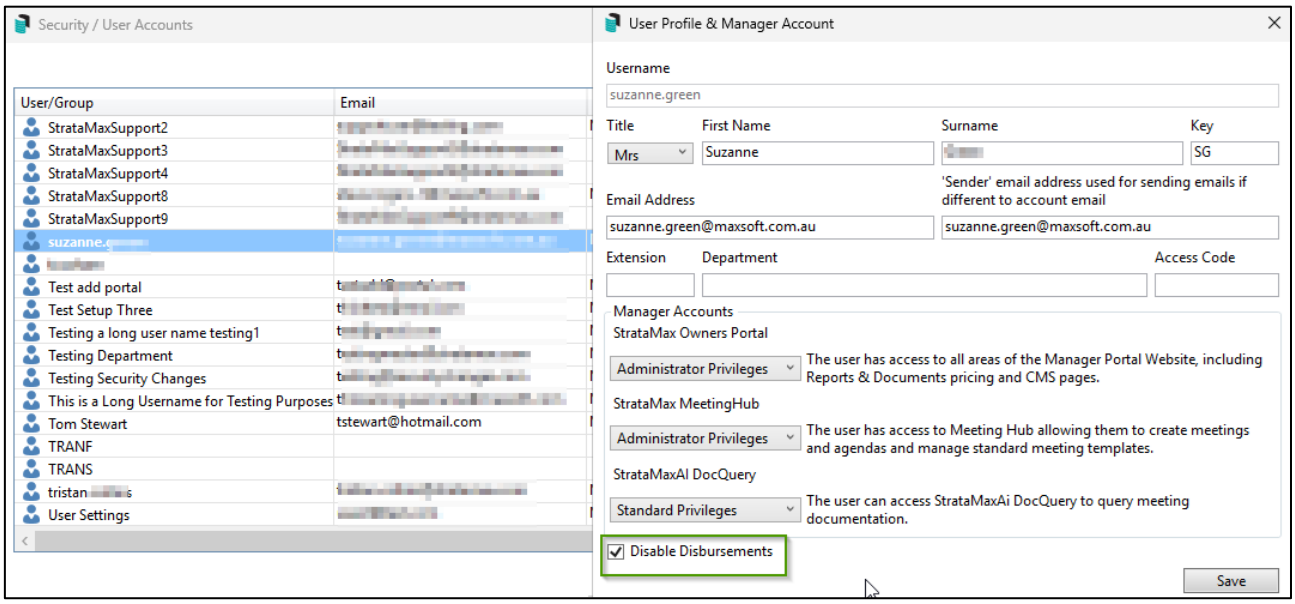
New security functionality has been introduced to provide greater control over how Disbursements are charged. A new 'Disable Disbursements' option has been added to User Profile and Manager Accounts, allowing Disbursements to be created without being charged.

Please Note – 'Disable Disbursements' setting will not be enabled by default.

When the setting is enabled, users can continue to create and view Disbursements in TRMax. These Disbursements will be marked as No Charge, and recoveries will not be sent to GLMax for processing.

-Navigate to Security

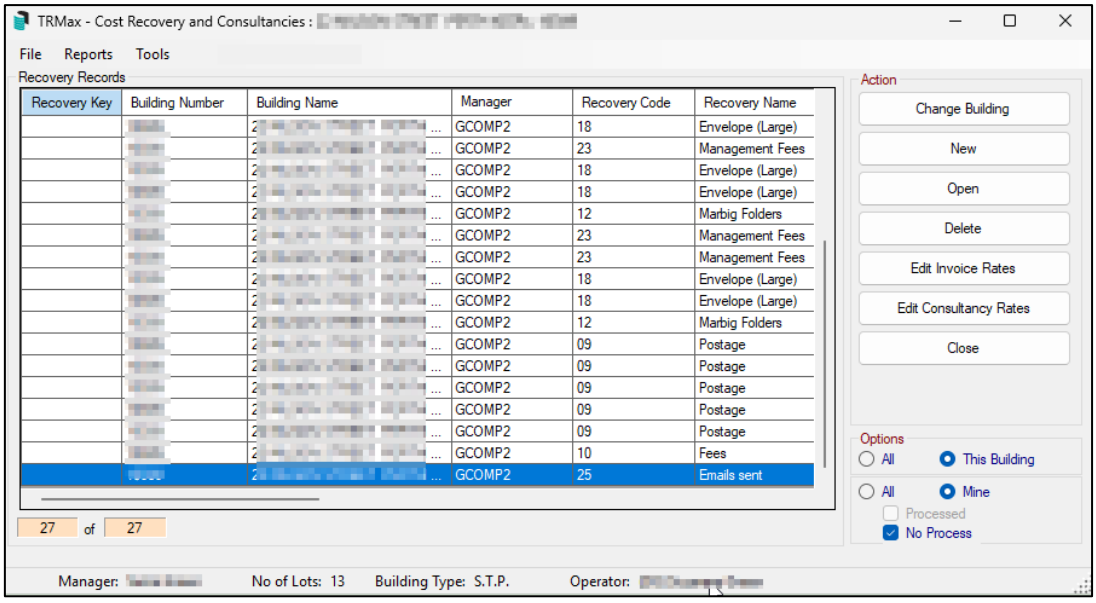
-Right click on username, select Edit User Profile & Manager Account

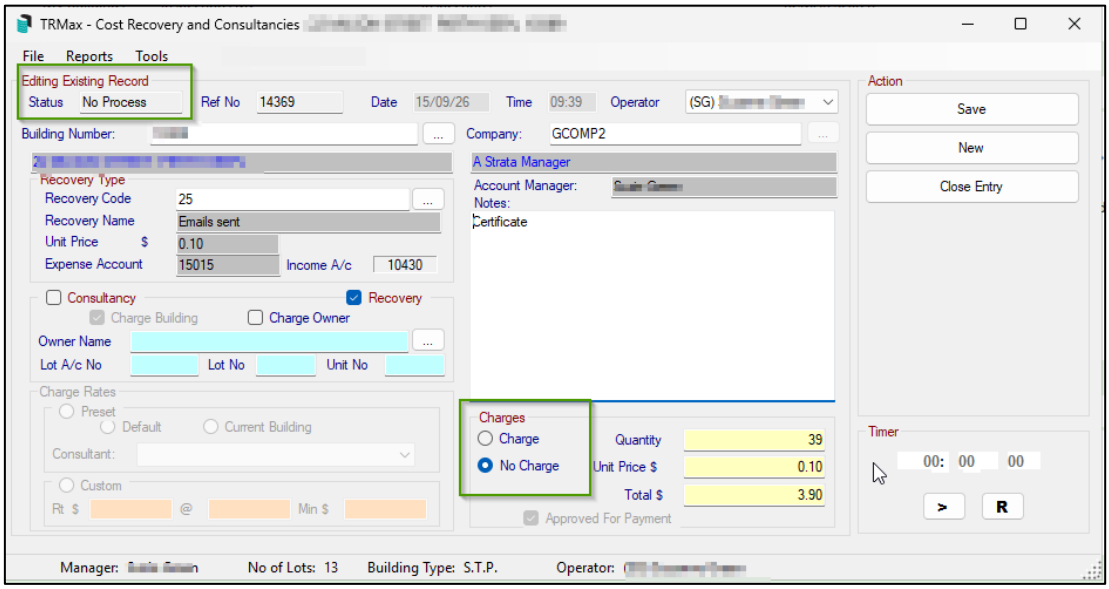


When Disbursements have been created the Disbursements can still be viewed in TRMax, - Cost Recover and Consultancies but the Disbursement will be flagged 'No Charge' and 'No Process.'

-Navigate to TRMax

-Highlight Disbursement and select Open





3. Multi-Factor Authentication

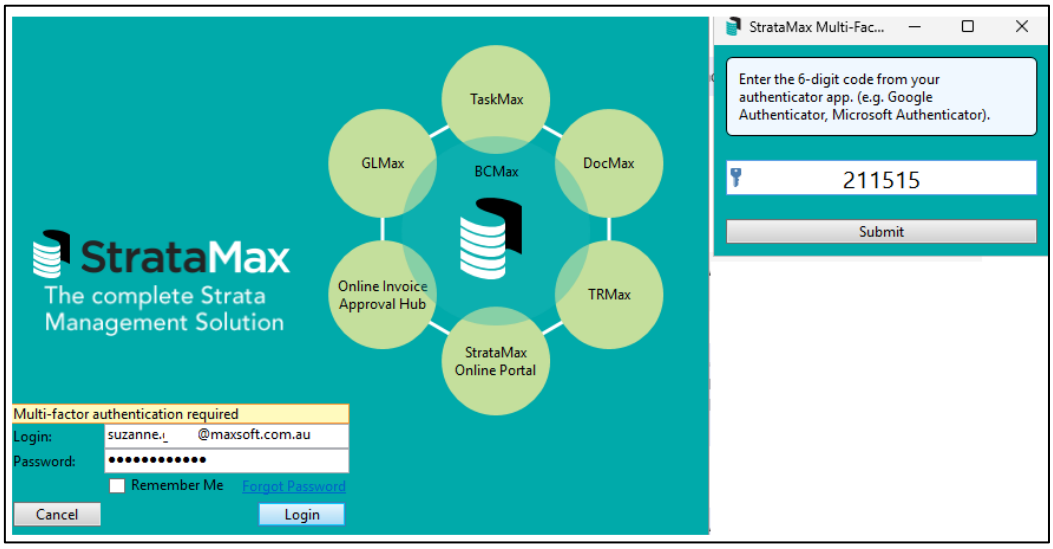
Multi-Factor Authentication can now be enabled for StrataMax logins, providing an additional layer of security for user access. When enabled, users will be prompted during login to scan a QR code with their mobile device and complete setup using their preferred authenticator app.

Once Multi-Factor Authentication has been enabled, users must generate a one-time code each time they log in.

When logging into StrataMax, screen will display as follows, if the client is unable to scan the QR Code there is an option to manually enter the 'key.'

Once the QR code is scanned, clients can select the link and their preferred authenticator app.

For subsequent logins to StrataMax, the Multi-Factor Authentication will display for the one-time code to be entered.



4. BAS – PAYG Instalment Reporting Improvements

This release includes improvements to the management of PAYG Instalment tax processing within BAS reporting. These changes help ensure PAYG Instalment provisioning transactions are correctly excluded from BAS calculations where required, reducing the risk of incorrect reporting and improving consistency across client setups.

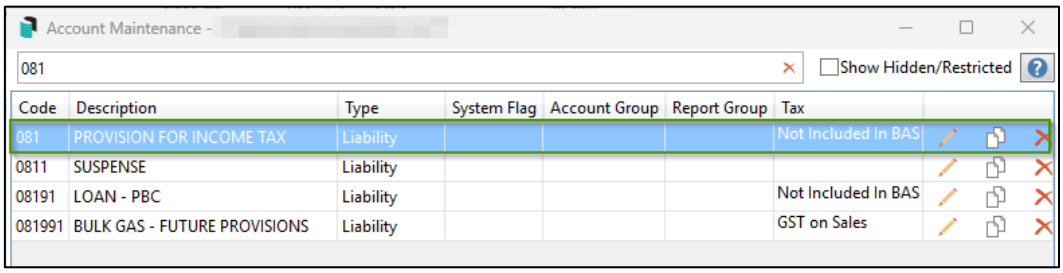
4.1 Overview

Enhancements have been made to ensure PAYG Instalment provisioning accounts and related transactions are no longer included in BAS statement calculations unless required by system-controlled processes.

4.2 Key Improvements

- **BAS Exclusion for Provision Account -** Journals / transactions to PAYG Instalment Provision are no longer included in BAS statements.
- **On Upgrade -** PAYG Instalment Provision account tax code will be updated from 'PAYG instalment tax' to 'Not Included in BAS'

- **New Clients –** PAYG Instalment Provision default tax code will be updated to 'Not Included in BAS'



- **Accounting Tax Setup Controls –** The PAYG Instalment Expense Account can only be configured with the 'Not Included in BAS' tax code in Tax Setup
- **System Controlled Tax Handling –** PAYG Instalment tax code is only applied by system-controlled processes

4.2.1 Benefits

These improvements support more accurate BAS reporting by reducing the risk of PAYG Instalment provision entries being reported incorrectly. They also provide a consistent tax configuration approach for both existing and new clients, while simplifying the setup and ongoing maintenance of PAYG Instalment accounts.

5. Levy Arrears Enhancements

5.1 Overview

This release introduces significant enhancements to the Levy Arrears functionality, including the ability to toggle between legacy Arrears Notices and new Levy Arrears, improved fee management capabilities, and configuration updates that make Levy Arrears settings independent from the legacy Arrears Notices and Reports module.

5.2 Key improvements

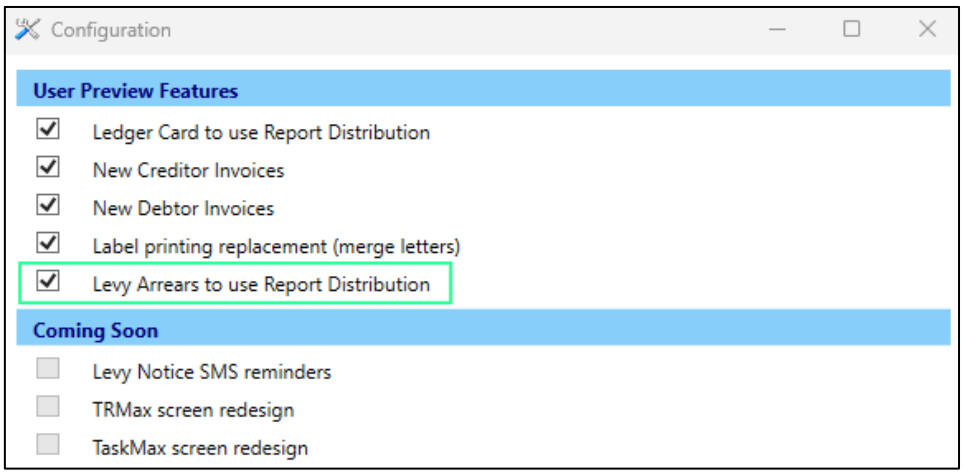
- Introduction of a preview feature to enable the new Levy Arrears Report Distribution though Arrears Notice menu
- Ability to credit arrears fees directly from Arrears Manager
- Migration of important Levy Arrears configuration settings from the legacy Arrears Notices module into Levy Management
- Improved management of Message Maker printing settings
- New validation and processing capabilities for outstanding arrears fees.

5.3 Levy Arrears Preview Feature

The new Levy Arrears Report Distribution feature has been added to the Preview Features configuration to allow users to toggle between the old Arrears Notices and Reports and the new Levy Arrears modules.

- New Preview Feature setting allows users to switch between: Legacy Arrears Notices and Reports and New Levy Arrears Report Distribution
- Provides a controlled transition path for users adopting the new Levy Arrears functionality.
- Enabled by default.

Click your username in the bottom right corner of the BCMax Desktop and select Preview Features to access the configuration. Access is based on your security permissions. Tick 'Levy Arrears to use Report Distribution' to enable the configuration.



When set, Levy Arrears will open in Report Distribution mode when the Arrears Notice menu item is clicked.

If the configuration is not enabled, the old Arrears Notices and Reports module will open.

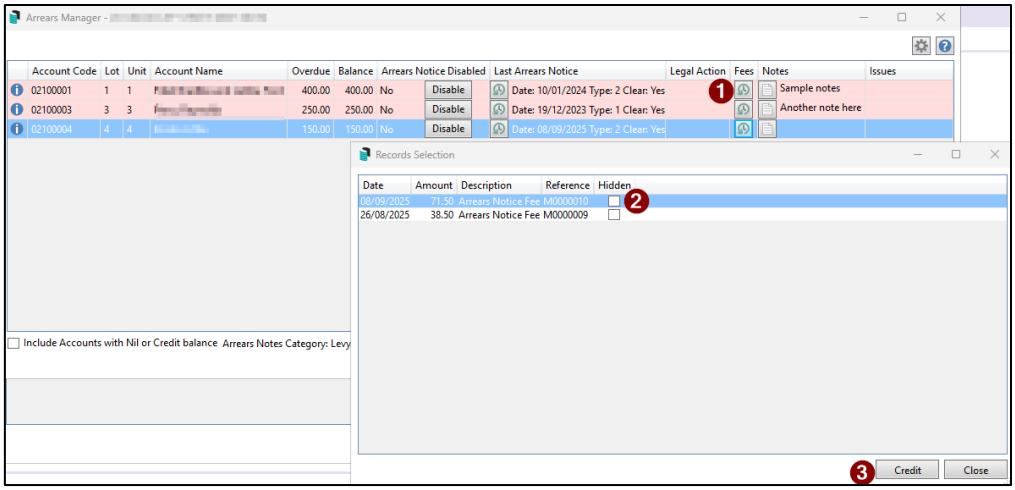
Note: New Levy Arrears will still be accessible through Levy Management if the configuration is not enabled.

5.4 Credit Arrears Fees

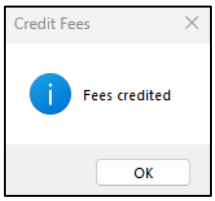
- Arrears fees can now be credited directly from Arrears Manager
- Provides a simpler process for fee reversals without requiring manual adjustments.
- Reversed fee records are automatically hidden to prevent duplicate reversals

Follow these steps to use this function.

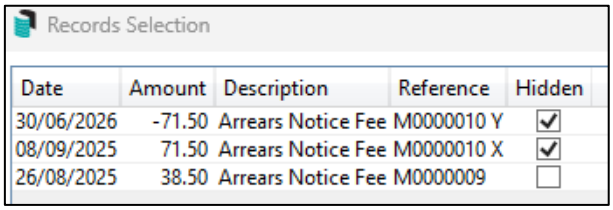
1. Levy Management
2. Options
3. Arrears Manager
4. Click the Fees icon for the account you need to credit (1)
5. Select the fee record to credit (2)
6. Click 'Credit' (3)



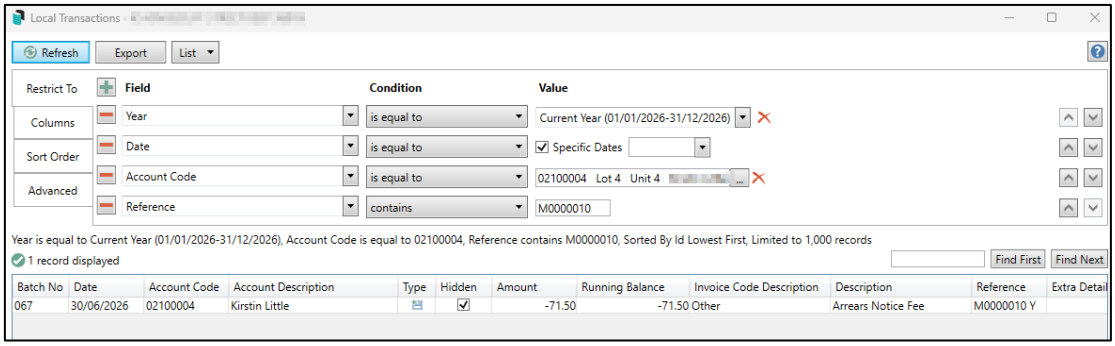
A confirmation box will appear to confirm the fee has been reversed successfully. Click OK to complete the process.



The fee record will be reversed, and the 'Hidden' checkbox will be set to prevent further reversals.



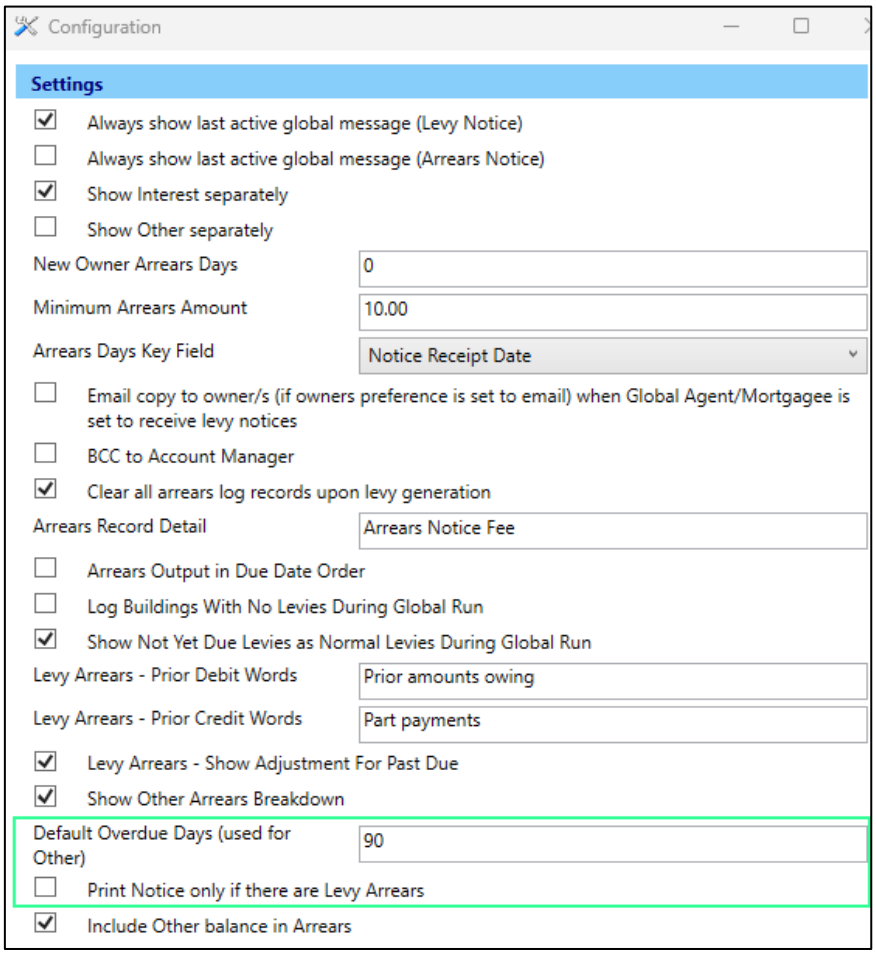
Local transactions



5.5 Levy Arrears Configuration Enhancements (Global Levy Notice Configuration)

The following configuration settings have been added to Levy Management Global Configuration and will no longer depend on the settings in the old Arrears Notices module.

- Default Overdue Days (Used for Other)
- Print Notice Only if there are Levy Arrears



Navigate to Levy Arrears, click the configuration cog, and select Global Levy Notice Configuration to see this change.

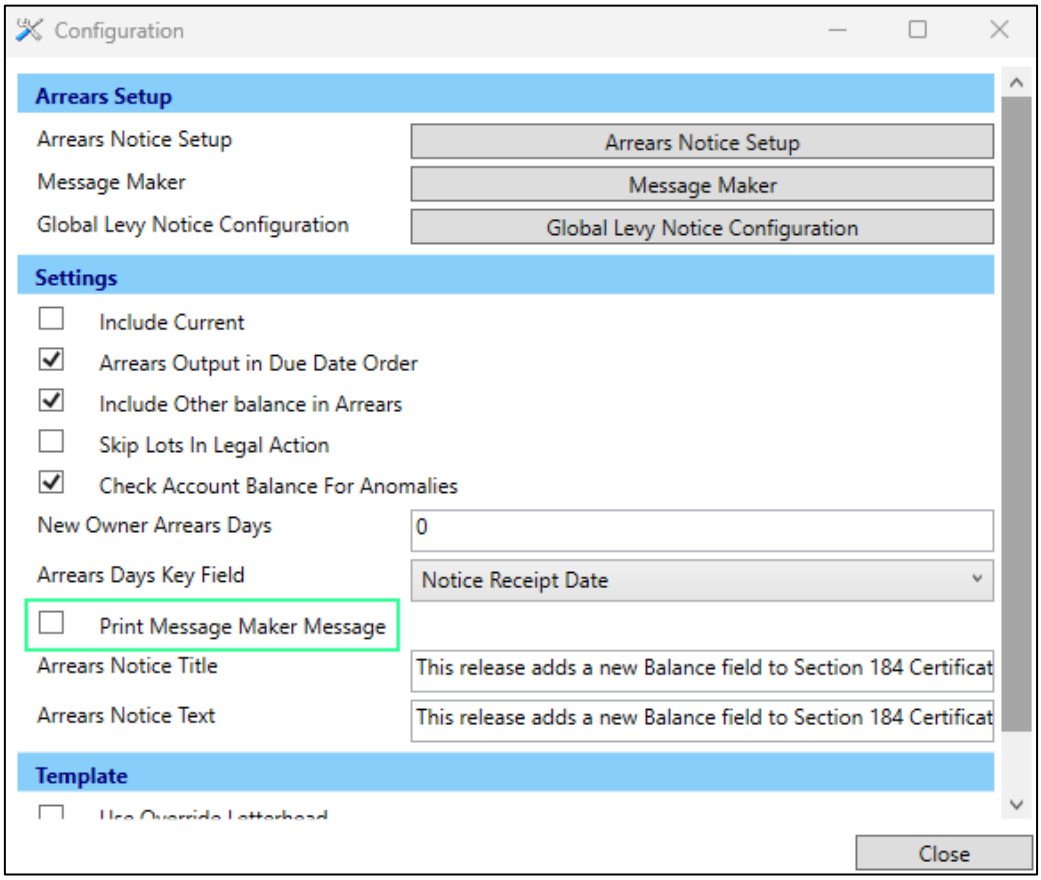
5.6 Levy Management and Levy Arrears Configuration Enhancements (Levy Arrears Configuration – Print Message)

Printing Messages from Message Maker in Levy Management and Levy Arrears will no longer depend on the Print Message configuration in the legacy Levy Notices and Arrears Notices screen. This can now be managed in Levy Management Levy Arrears configuration screen.

Levy Arrears

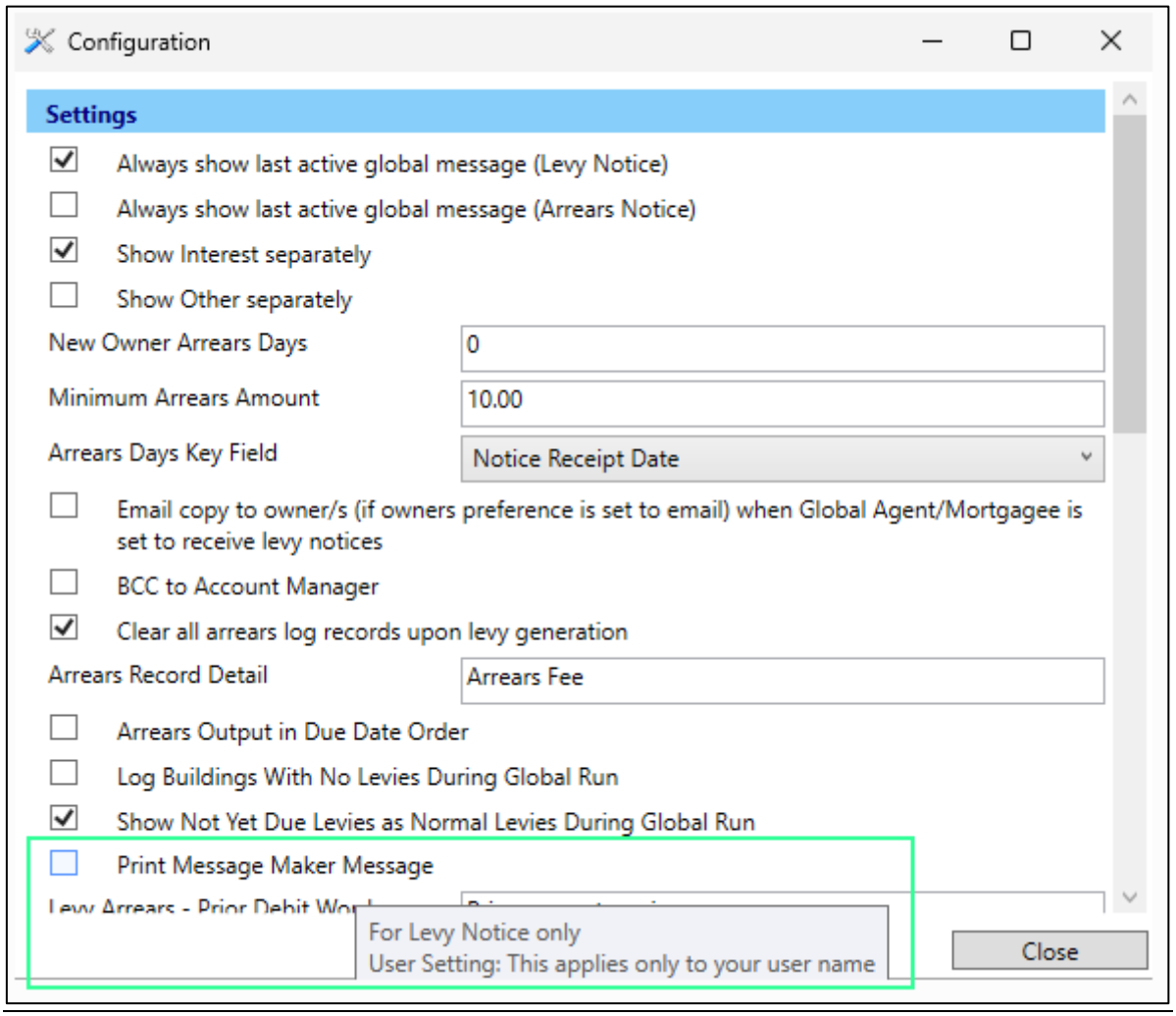
1. Navigate to Levy Management
2. Reports
3. Levy Arears
4. Click the configuration cog icon

5. Tick / untick Print Message from Message Maker in the settings panel



Levy Management

1. Levy Management
2. Reports
3. Distribute Levies
4. Click configuration cog icon
5. Tick / untick Print Message from Message Maker in the settings panel.

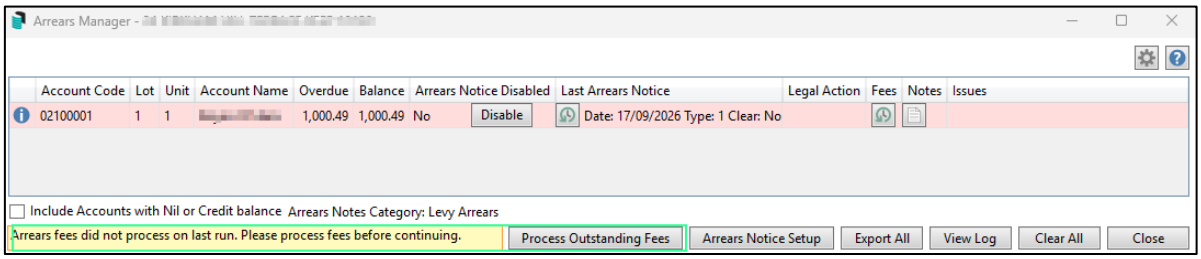


Note: These settings do not manage Message Maker in the legacy Levy Notices and Reports and Arrears Notices screens.

5.7 Arrears Manager – Process Fees and Logs

Occasionally, errors are encountered if Arrears Fees are not setup correctly which prevents fees logs from processing. This will be validated in Arrears Manager and Fees can be processed from there after correcting the set up issue.

Navigate to Levy Management / Options / Arrears Manager if this occurs. Click Process Outstanding Fees to complete processing fees and clear the validation message.



6. Task Management Enhancements

6.1 Overview

Enhancements to Task Management have been included in this release with the introduction of Child Tasks and Task Templates.

The introduction of Child Tasks provides greater flexibility for managing complex activities that require multiple actions, owners, or due dates. Child Tasks can be created against Events, Schedules, and Templates, allowing multiple related tasks to be linked to a parent task. These tasks can be assigned to different users and configured with their own due dates, enabling work to be completed before or after the parent task's completion date while maintaining visibility of the overall activity.

Task Templates have been designed to streamline the creation of recurring manual tasks by allowing users to create and save reusable task structures. This reduces the need to manually recreate tasks each time and helps ensure consistency across task management processes. An example could be Insurance Claims Received.

6.2 Key Features and Enhancements

6.2.1 New Features

- Create reusable Task Templates for recurring manual tasks.
- Create Child Tasks beneath parent tasks.
- Create Sub Child Tasks beneath existing child tasks.
- Clone existing Events, Schedules, and Templates.
- Assign child tasks to different users with independent due dates.
- Preview task schedules before applying templates.

6.2.2 User Interface Improvements

- New Automations workspace replaces the previous Schedules area
- Clear separation between Events, Schedules, and Task Templates
- Enhanced calendar view for improved visibility of tasks due on the same day
- Unsaved changes are now clearly indicated
- Improved automation management through drag-and-drop functionality
- Added Show Disabled option for Events, Schedules, and Templates

6.3 Automations

The previous Schedules button has been replaced with Automations. Navigate to Task Management and click Automations button to access the new screen

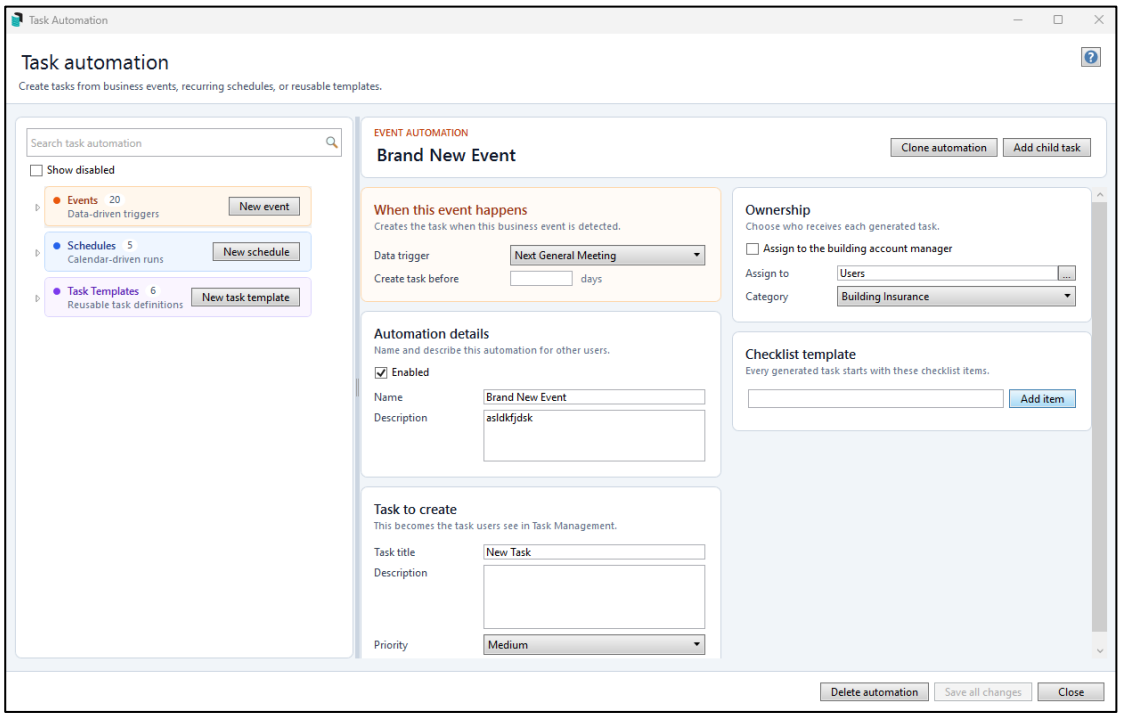
The Automations screen contains three separate sections:

- Events
- Schedules
- Task Templates

Each section can be expanded using the arrow beside the heading to display configured items.

Users can:

- View existing Events and Schedules.
- Create new Events.
- Create new Schedules.
- Create Task Templates.
- Clone existing automations.
- Reorganise automations using drag and drop.



6.3.1 Automations Enhancements

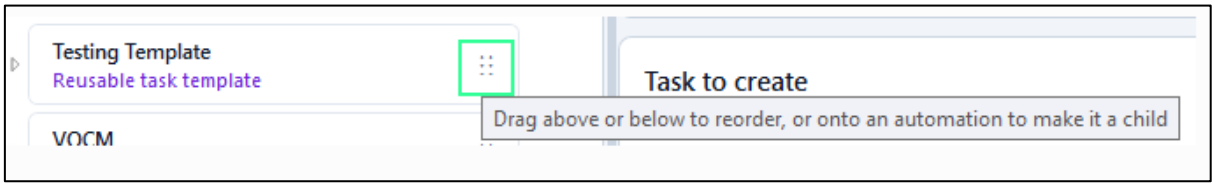
Unsaved Changes Indicator

Events, Schedules, and Templates will now display an orange indicator dot whenever unsaved changes exist.

This provides a clear visual reminder that updates have not yet been saved.

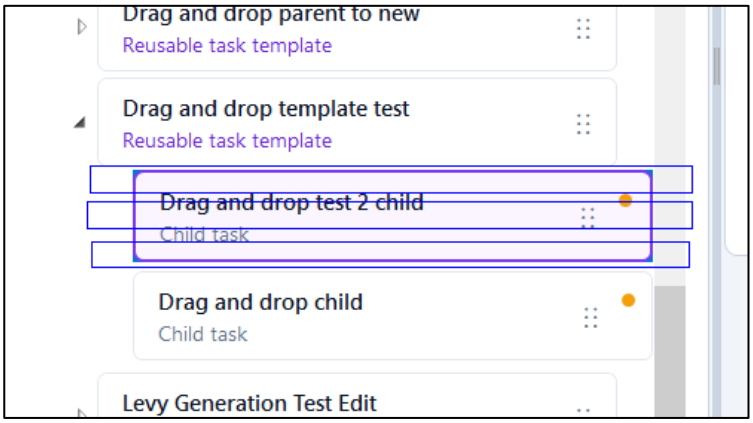
Drag and Drop Automation Management

Automations can now be reordered or moved within the same automation type using drag-and-drop functionality.



To Move an Automation

1. Select the drag handle
2. Hold down the mouse button
3. Drag the automation to the required position. Dragging to the top zone will place the task above, dragging to the bottom zone will place the task below and dragging to the centre zone will place int task inside as a child task



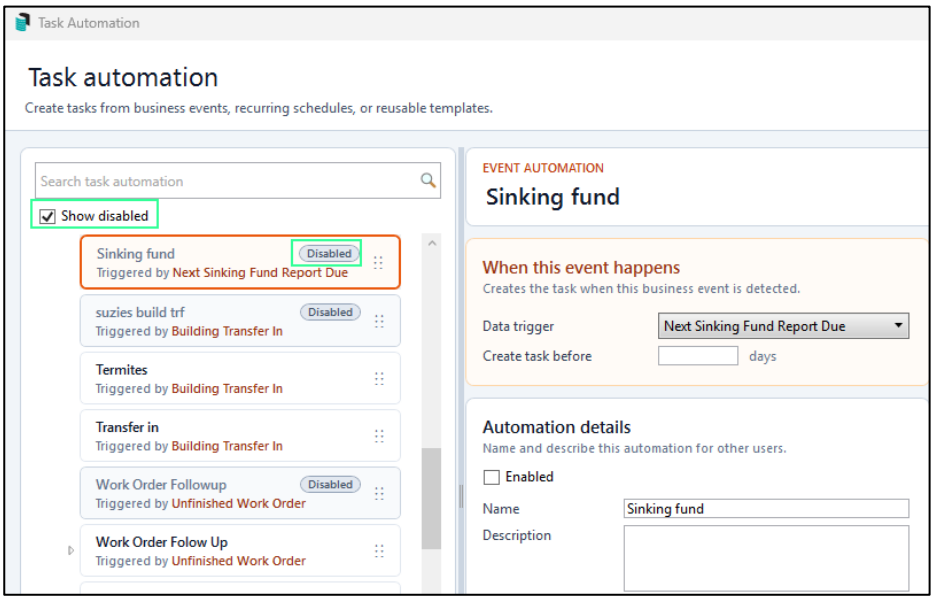
4. Release to drop into place

Note: Automations and tasks cannot be moved to a different automation type. E.g., A Template Task cannot be moved to an Event.

Show / Do Not Show Disabled Automations

A Show disabled option is included in the Automation screen to allow users to choose whether disabled Events, Schedules and Task Templates will be displayed.

Disabled tasks will be marked as "Disabled' to provide clarity.



6.4 Child Tasks

6.4.1 Overview

Child Tasks allow a parent task to be broken down into multiple activities that can be assigned to different users and completed on different dates.

Child Tasks can be created within:

- Events
- Schedules
- Task Templates

Child Tasks can also contain additional Child Tasks, creating multi-level task structures for complex workflows.

6.4.2 Creating a Child Task

Within an Event, Schedule, or Task Template:

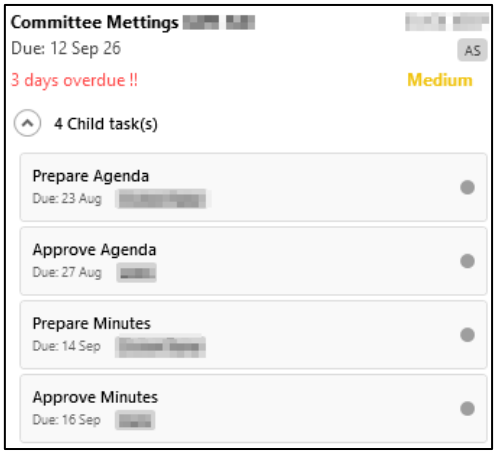
1. Click Child Task.

2. Enter the number of days from the parent task due date.
    - Positive value = after due date
    - Zero = same day

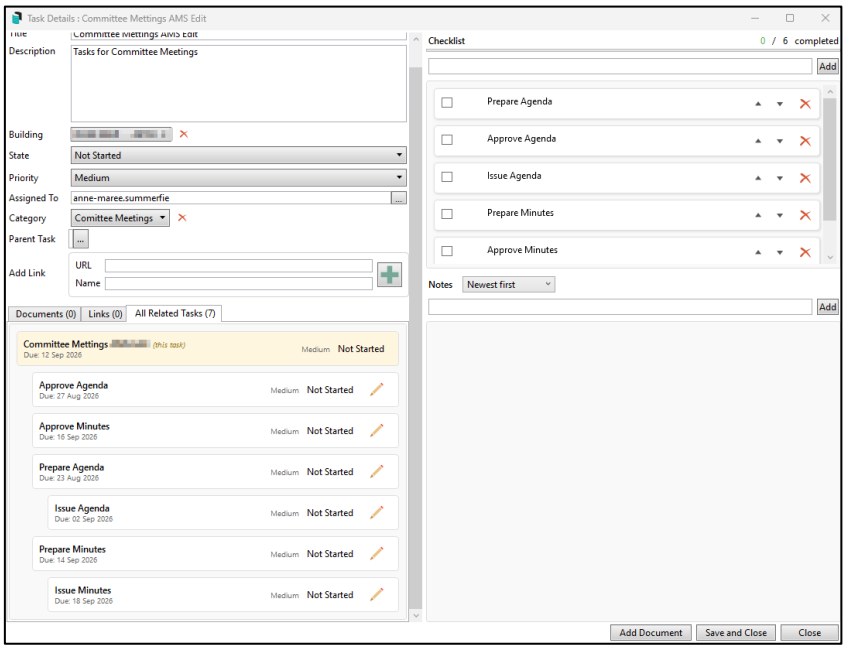
- Negative value = before due date

3. Tick Enabled
4. Enter the automation name
5. Enter task details (optional)
6. Complete the task title
7. Complete task details
8. Select priority
9. Configure ownership:
   - Select assignee.
   - Select category.
   - Optionally assign automatically to the Building Account Manager.
10. Add checklist items if required
11. Click Save All Changes

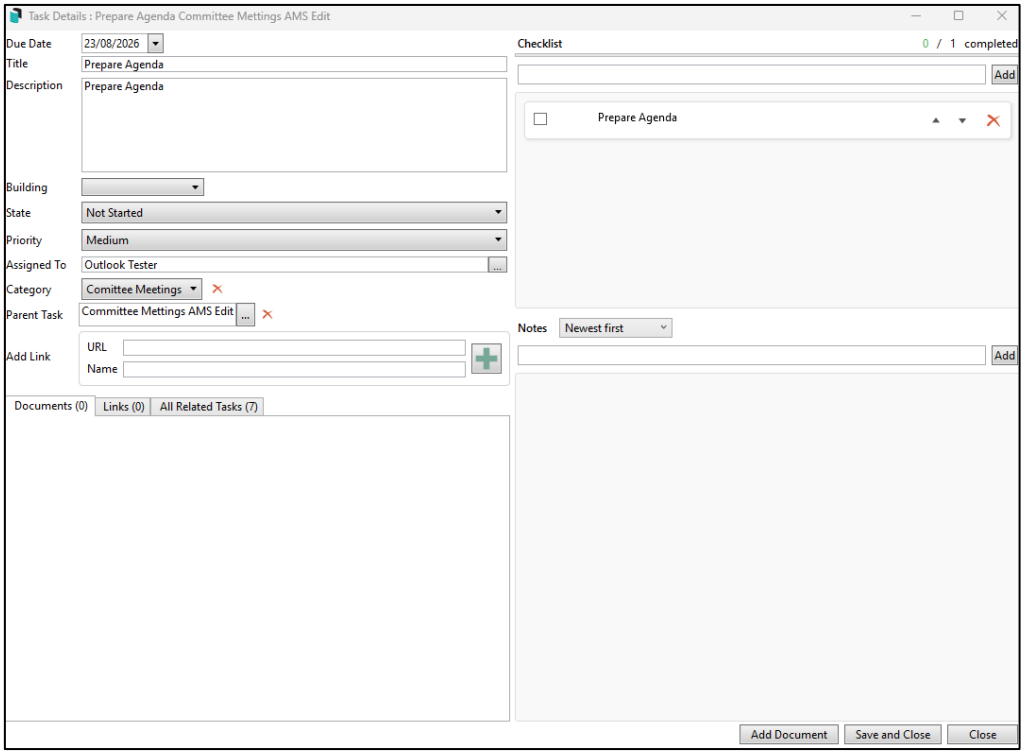
Where a task has child tasks, the task can be expanded to show the child tasks by clicking the expand arrow.



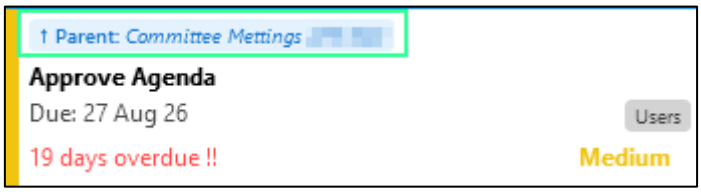
Click on the parent task to view associated child and sub child tasks.



Click the pencil icon to drill into the child task.



Child tasks will display the parent task to which it is related.



Example AGM Workflow

Parent Task - AGM Meeting

Child Tasks

Task	Due Timing	Owner
Send Committee Nominations Form and Call for Motions	60 days prior (-60)	Assistant
AGM Preparation Review	45 days prior (-45)	Account Manager
Draft Proposed Budget and Proposed Levies Report	40 days prior (-40)	Accounts Team
Prepare Agenda Notice	35 days prior (-35)	Assistant
Manager Approve Agenda	31 days prior (-31)	Account Manager
Issue Agenda Notice	30 days prior (-30)	Assistant
Prepare Minutes	2 days after (2)	Assistant
Update StrataMax Data	2 days after (2)	Assistant

Example Sub Tasks

AGM Preparation Review

- Review draft financials
- Review lot balances (arrears)
- Review administration and sinking funds

Update StrataMax Data

- Office Bearers
- Meeting Summary
- Approve Levies

Note: When adding child tasks, if the child task belongs to the initial parent ensure you click back on the parent task before adding another child task.

6.5 Clone Automation

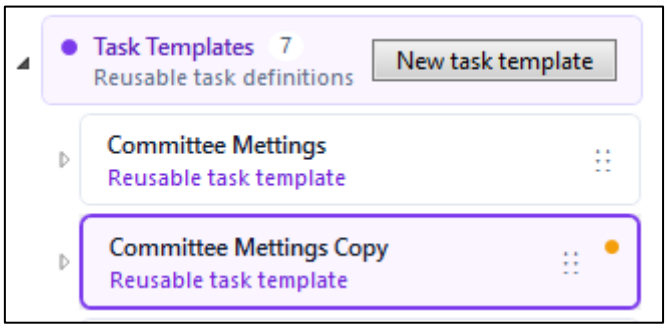
Events, Schedules, and Task Templates can now be cloned.

This allows users to quickly create a duplicate of an existing automation and modify it as required.

To Clone an Automation

1. Open the Event, Schedule, or Template
2. Click Clone Automation
3. A copy will be created automatically

The cloned automation will be created with the original name followed by 'copy' which can be edited if required.



6.6 Task Templates

6.6.1 Overview

Task Templates enable users to create reusable task structures for recurring manual activities.

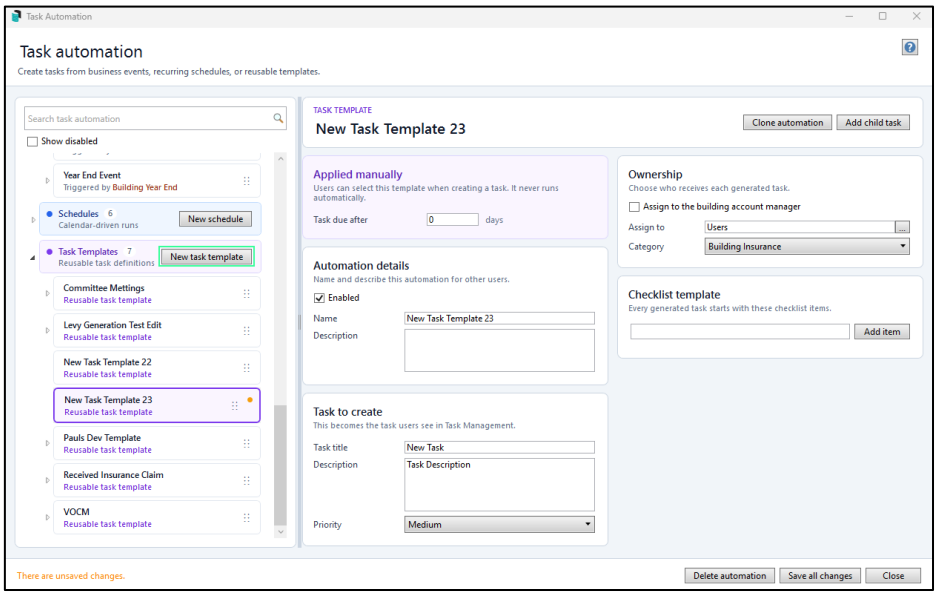
When a template is applied, task details, ownership settings, checklists, and scheduling structures are automatically populated.

Example Use Cases

- Insurance Claims Received
- AGM Meetings
- Levy Recovery Processes
- Maintenance Workflows
- Contractor Engagement Processes

6.6.2 Creating a Task Template

Navigate to Task Management, click Automations, and select 'New Template' to begin creating a new template. A new template setup screen will open.



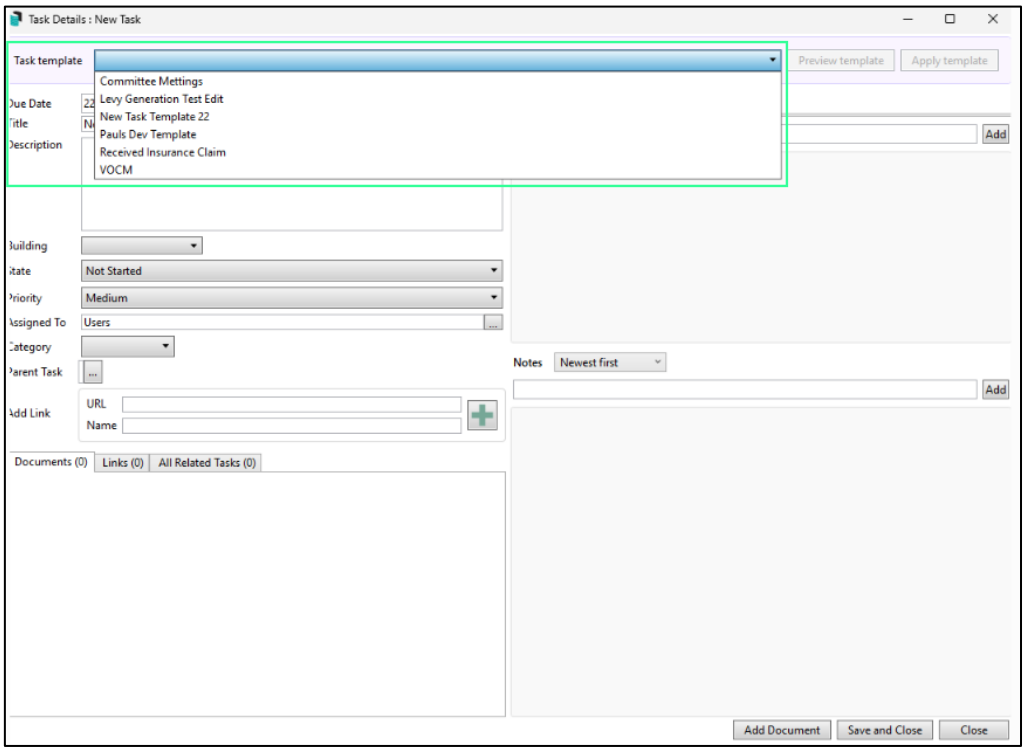
Complete the following:

1. Set the number of days from the due date
2. Tick Enabled
3. Enter the Template Name
4. Enter Template Details (optional)
5. Enter Task Title
6. Enter Task Details
7. Set Priority
8. Configure Ownership
9. Add Checklist Items if required
10. Click Save All Changes

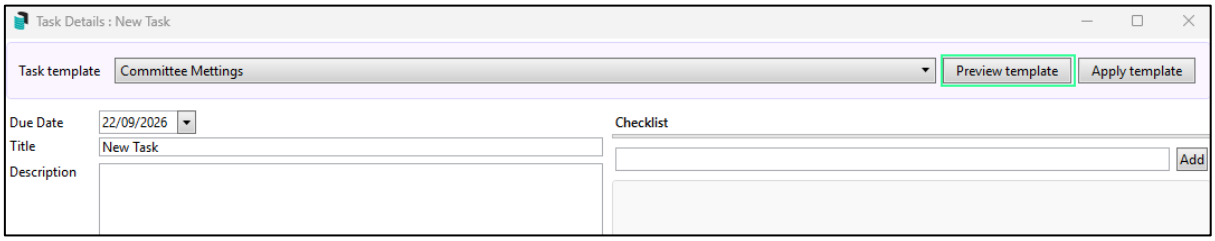
The Task Template automation name will be updated and displayed in the left pane under Task Templates.

6.6.3 Applying a Task Template

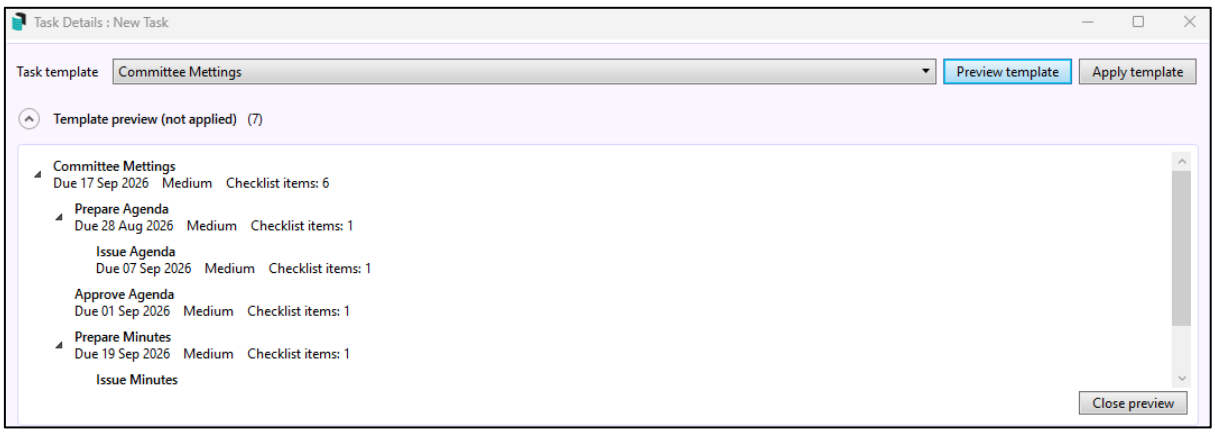
1. Navigate to Task Management
2. Click Add Task
3. Select a template using the Template Selector



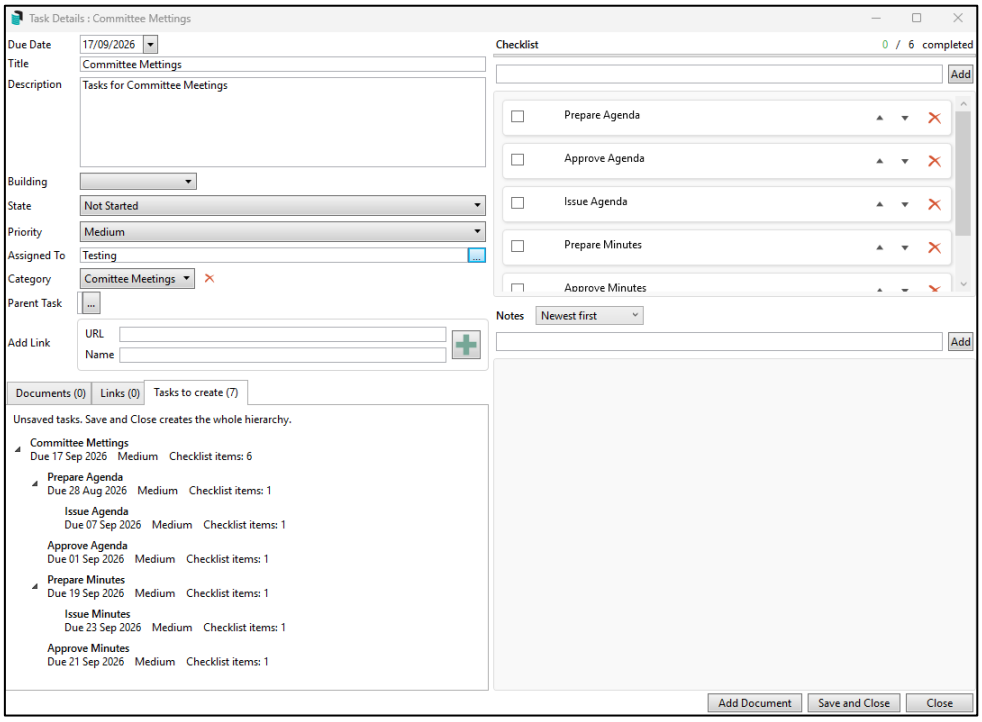
Once selected, click preview to view the task schedule.



The timeline is based on the due date set in the new task and will apply dates based on the days set in the task template.



Click 'Close Preview' to close the preview screen. If you are happy with the timeline and task details, click 'Apply Template' to auto-populate the task from the template details. Edit the details if required and click Save and Close.'



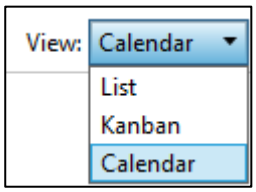
Tasks will then be displayed in the List, Kanban, or Calendar views.

Note: Task Templates can only be applied to new tasks. Existing tasks will not display the template selector.

6.6.4 Calendar Enhancements

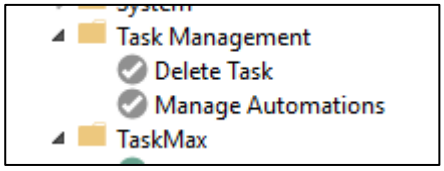
The Calendar view has been enhanced to show multiple tasks due more clearly on the same day.

Navigate to Task Management and select the Calendar view to review this change.

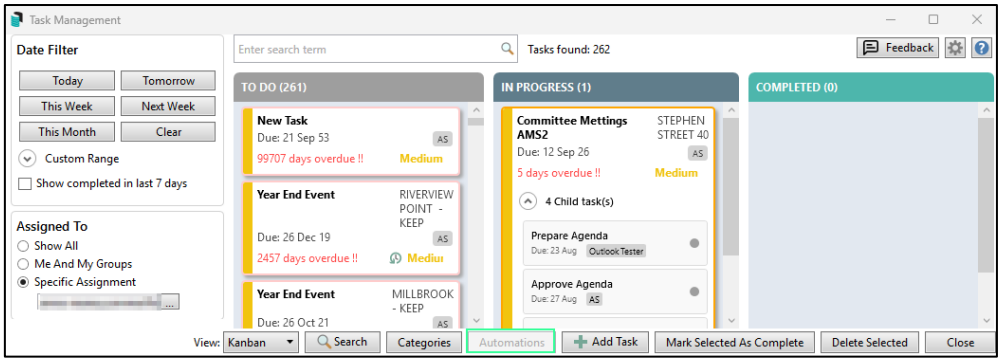


6.7 Task Management Security Permissions

The security permission for Manage Schedules and Events has been changed to Manage Automations.



If permission to this control is denied, the Automations button will be disabled.



7. SMS – Only Distribution for Levy Arrears Notices

7.1 Overview

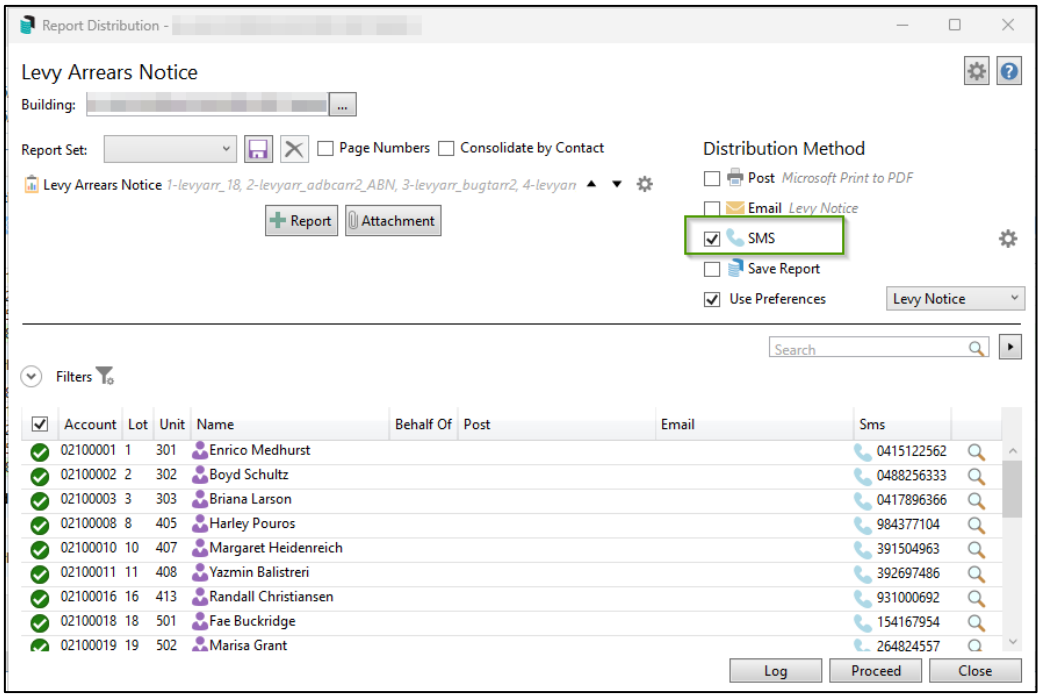
Report Distribution has been enhanced to support SMS-only delivery of Report Distribution notices including levy and arrears notices, merge letters, and status

reports. Users can now distribute notifications via SMS without the need to generate report documents, emails, or printed correspondence.

This enhancement provides a faster and more flexible method of communicating with owners who are in arrears, allowing managers to send targeted SMS notifications directly from Report Distribution.

7.2 Key Enhancements

This change introduces support for SMS-only allowing users to send notifications by SMS without generating report documents, emails, or printed correspondence. Users can select SMS as the sole delivery method and apply a customised SMS template, providing a more streamlined and flexible communication process. Where SMS is the only selected distribution method, document generation is no longer required, and notice records are managed appropriately when document creation is intentionally bypassed.



What's Better

- Building Information - SQL Date error when date fields are not validated. Validation has now been added to the Building Information fields that users can enter dates in BCMax, GLMax and Subgroups. The system will now return a validation message to advise the user that the date must not be before 1800, and the save button will not be available.
- Search Recoveries - the Invoice Processed and Payment Approved columns were being flagged incorrectly, this has been resolved.
- Status Reports – Selecting historical year dates where the Bank Transaction Report was included was causing errors. This has now been resolved.
- Meeting Summary – Dates can no longer be deleted once a meeting has been saved.
- Building Information - The StrataPay Only check box has now been made smaller to assist with clients mis-clicking the checkbox.
- Auto Error - Out of range exception in DataGrid when creating the DocMax Browse By Buildings has been resolved.
- Debtor Scheduled Invoices - Post Standing Journals was not process Scheduled Debtor Invoices. This has now been corrected.
- New Creditor Invoice - An issue has been resolved where amounts loaded into New Creditor Invoices, including invoices created via the Creditor Work Queues module, could differ from the amounts entered in the DocMax Invoice Details. In some cases, this resulted in a one-cent variance in the total invoice amount and GST calculations when the invoice was saved.