Release Notes – Version 5.6.164

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. Building Health Report – New fields

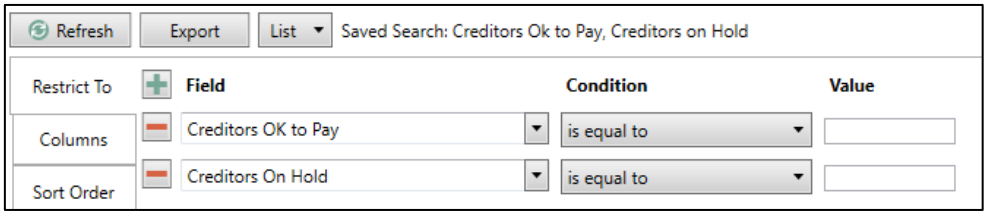
The Building Health Report has been enhanced to provide greater visibility of creditor balances by introducing two new fields:

- Creditors OK to Pay
- Creditors On Hold

These additions enable users to view key creditor information within a single report, improving reporting efficiency and financial oversight.

To add the new fields to the Building Health Report:

1. Navigate to Building Health.
2. Select the Add icon.
3. Choose Creditors OK to Pay and/or Creditors On Hold.
4. The selected fields will be displayed in the report.



These fields can also be used in the following ways:

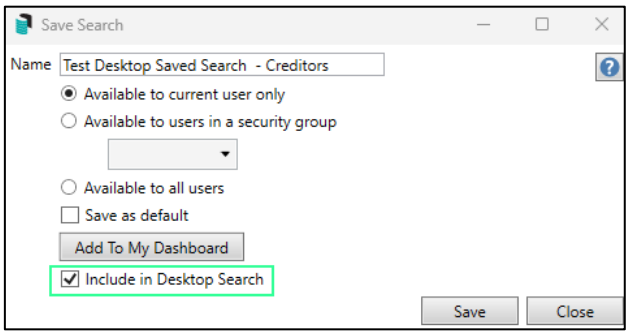
- Added as columns
- Added to a Saved Search
- Exported to Excel
- Exported to Print Reports

2. Saved Searches – Desktop Search

2.1 Overview

An enhancement has been introduced to Saved Searches to improve search accessibility. Users can now make selected saved searches available directly from both the BCMax Desktop Search and StrataMax Search interfaces.

A new configuration option, Include in Desktop Search, has been added to supported Saved Search screens. When enabled, users can locate and launch the saved search directly from the desktop search experience by searching for the saved search name.



2.2 Key Enhancements

Saved Searches saved with the 'Include in Desktop Search' set will be included if the search term matches the saved search name. Searches will be displayed as a menu item which will open the search directly from the BCMax Desktop search or the StrataMax Search.

5. Open a supported search screen.
6. Create or edit a Saved Search.
7. Enable Include in Desktop Search.
8. Save the search.
9. Close and re-open BCMax
10. The saved search will become available in:
    - BCMax Desktop Search
    - StrataMax Search
11. When a user enters text matching the saved search name, the saved search will appear as a menu item.
12. Selecting the menu item opens the saved search directly.

BCMax Desktop Search

StrataMax Search

The new setting is supported in the following search screens:

Search Management Fees	Scheduled Debtor Invoices	Search Work Orders
Search Bank Statement History	Non-Mutual Income	Search Quotes
Search Bank Accounts	Local Transactions	Search Buildings
Creditors Management	Log Viewer	Reading Record List
Payments Management	Search Creditor Invoice Items	Search Building Info History
Global Transactions	Search Inspections	Search Levies
Search Contacts	Search Payments	Search Creditors
Search Roll	Search BAS	Search Income Tax
Search Pay Employees	Local Debtors	Global Debtors
Search Local Accounts	Search Global Accounts	Search Office Bearers
Search Insurance	Search Insurance Claims	Search Certificates Issued

Organisation - Roll	Organisation - Contacts	Organisation - Creditors
Organisation - Tasks	Organisation - Office Bearers	Search Recoveries
Search Meetings	Search Tasks	Search Contracts
Building Health	Scheduled Creditor Invoices	

Note: After a search is created or modified (by you or another user), BCMax must be closed and reopened before the updated search becomes available for use.

3. Report Distribution – Distribute Levies

A new configuration option has been introduced to provide greater control over the address information displayed on the Distribute Levies report, via Report Distribution.

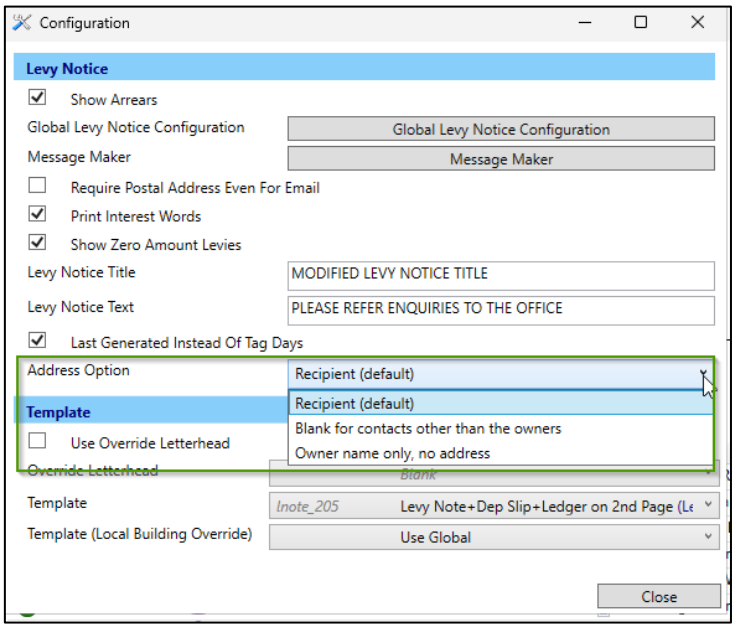
Previously, when a Distribute Levies was generated, the address displayed on the report was the recipient's address, typically the applicant's address. While this behaviour supported postal delivery requirements, it could result in address information being displayed where the recipient was not the property owner.

To address potential privacy concerns, a new Distribute Levies configuration setting has been added. This setting allows users to determine whether address information is displayed when the levies recipient is not the lot owner.

New Configuration Setting

A new 'Address Options' setting has been added Distribute Levies configuration within Report Distribution. This global configuration allows users to select one of the following options:

- **Recipient (Default)** – Retains the existing functionality. The recipient's name and address are displayed on Distribute Levies
- **Blank for contacts other than the owner** – When the recipient is not the owner, no address information is displayed on Distribute Levies
- **Owner's name only, no address** – Only the owner's name is displayed. No address information is shown.



4. Task Management – Timed Tasks

4.1 Overview

This release introduces Timed Task Management, enabling users to record time against tasks directly within Task Management. Timed entries can be marked as billable, allowing consultancy recoveries to be created in TRMax and subsequently processed through the standard recovery workflow.

The release also includes new billing processing functionality, enhanced task visibility through recorded time entries, and a new reporting option for analysing time allocations.

4.2 Key Features and Enhancements

Timed Task Recording

- Create and track time directly against Task Management tasks.
- Automatically start timing by selecting an assigned task.
- Pause and resume recordings as required.
- Switch between tasks while preserving elapsed time on previously selected tasks.
- Add comments and save recordings upon completion.

Billable Time Management

- Mark recorded time as billable where the task is associated with a building.
- Apply default consultancy rates based on existing TRMax consultancy configuration.
- Create consultancy recovery transactions for later processing.

Billing Processing

- New Process Billing function in Task Management.
- View all unprocessed billable time entries.
- Edit or delete recorded entries before processing.
- Process selected entries into TRMax consultancy recoveries.

Time Entry Visibility

- New Time Entries tab within tasks.
- Edit or delete existing time records.

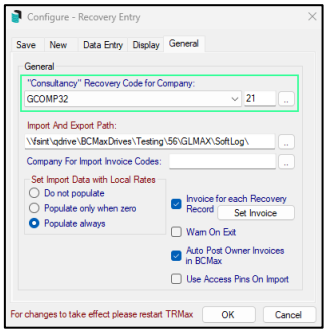
Reporting Enhancements

- New Search Time Allocation function.
- Export results to Excel or print reports.
- Search and report on all recorded timed task activity.

4.3 Configuration Requirements

Before using Timed Task recordings:

1. Configure a consultancy invoice code in TRMax.
2. Ensure consultancy rates have been configured within TRMax.



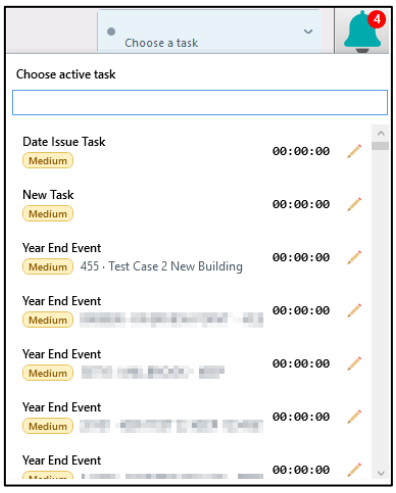
Grant users the required TRMax security permissions to access the Process Billing function.

For additional setup information, refer to:

- TRMax Consultancy Configuration
- TRMax Consultancy Rates.

4.4 Creating a timed record

Assigned tasks are displayed in the task selector located in the top-right corner of BCMax.



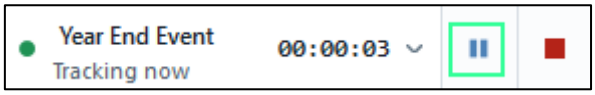
4.4.1 To start recording time

1. Select a task from the task list.
2. The timer will automatically start.
3. Continue working as normal within BCMax.

The timer continues running while working in other BCMax modules, such as Month End or Year End processing.

4.4.2 Pause a timer

Select Pause at any time to temporarily stop recording.



4.4.3 Switch between tasks

If you select another task while a timer is running:

- The current task timer will automatically pause.
- Timing will begin on the newly selected task.

4.4.4 View a task while timing

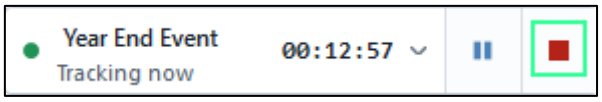
Selecting the Edit icon opens the task details.

Opening a task will automatically pause the timer.

4.4.5 Saving a Time Entry

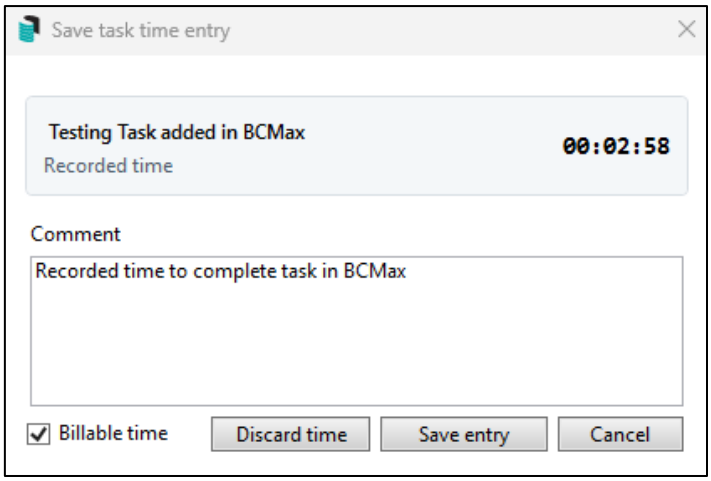
When your work is complete:

1. Click Stop.



2. Review the time entry details.
3. Add comments if required. (250-character limit).
4. Choose one of the following options:
    - Save the entry.
    - Discard the entry.
    - Cancel and continue recording.

If Cancel is selected, the timer will resume from where it was stopped.

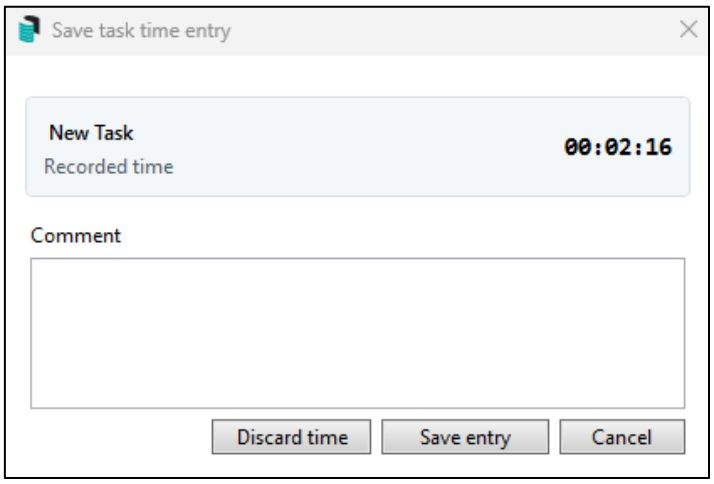


If another task is selected while the timer is running, the task will be paused and the timer for the newly selected task will start.

4.4.6 Billable Time

Where a task is allocated to a building, a Billable Time option will be available.

If the task is not linked to a building, the Billable Time option will not be displayed.

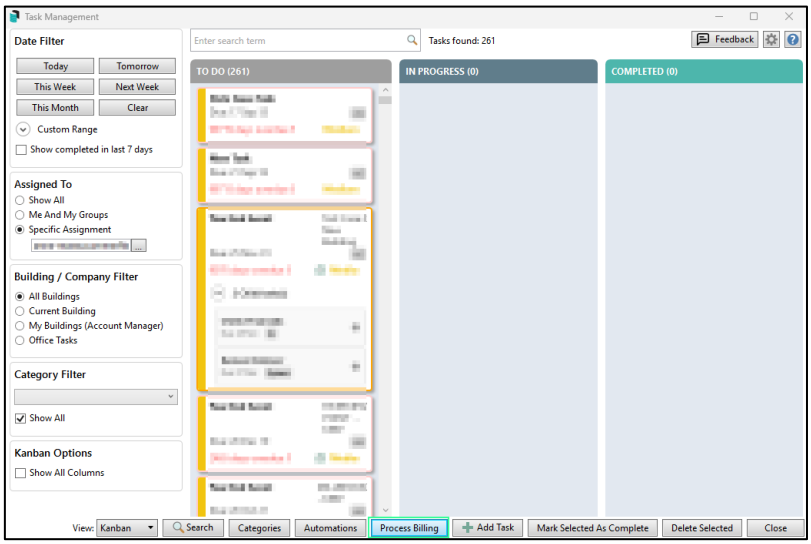


4.5 Task Management - Process Billing

Once a timed record is saved, billable tasks will be available for processing in Task Management. Navigate to Task Management and click 'Process Billing.' Security permission to TRMax must be allowed to enable the Process Billing button.

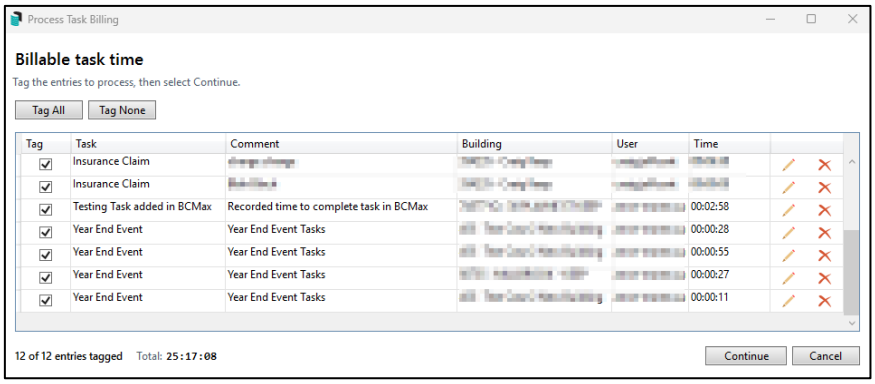
4.5.1 Accessing Process Billing

1. Navigate to Task Management.
2. Select Process Billing.



4.5.2 Processing Billable Time

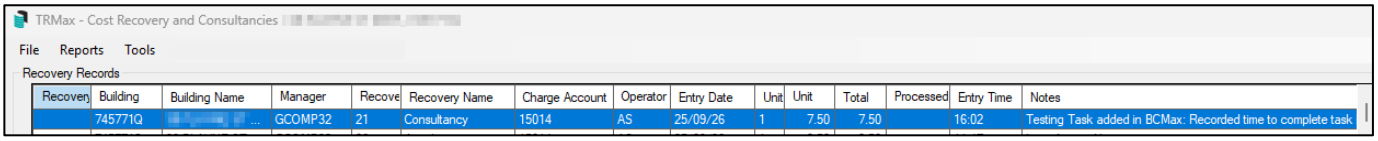
The Process Billing screen displays all billable, unprocessed recorded time entries.



- Click the Edit icon to modify time recorded or comments.
- Click Delete icon (X) to permanently remove a record.
- Press Tag All to select all records.
- Press Tag None to clear all selections.

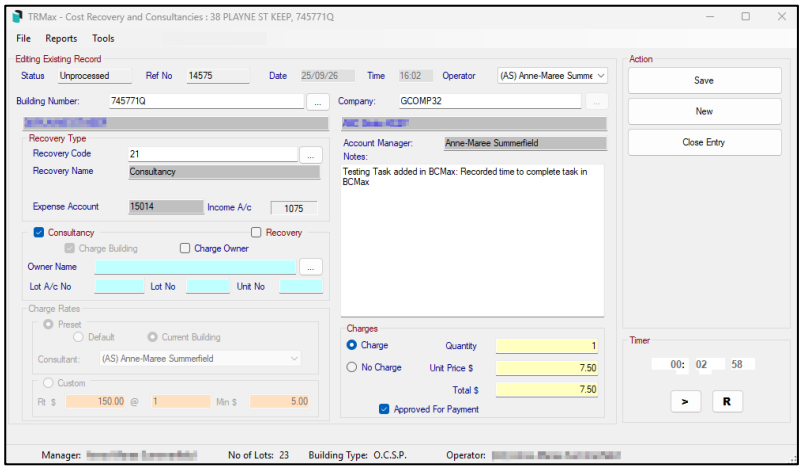
4.5.3 Processing Steps

1. Select the required records.
2. Click Process.
3. Records are sent to TRMax as consultancy recoveries.

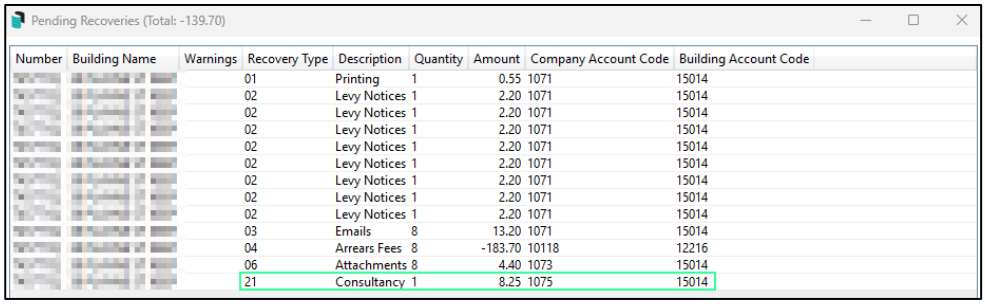


Notes

- Only billable entries appear in the Process Billing screen.
- Records can be reviewed and edited prior to processing in Task Management.
- Charge to Owner options can be configured in TRMax before processing.



The records will be available for processing in GLMax Process Recoveries.



Number	Building Name	Warnings	Recovery Type	Description	Quantity	Amount	Company Account Code	Building Account Code
			01	Printing	1	0.55	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			02	Levy Notices	1	2.20	1071	15014
			03	Emails	8	13.20	1071	15014
			04	Arrears Fees	8	-183.70	10118	12216
			06	Attachments	8	4.40	1073	15014
			21	Consultancy	1	8.25	1075	15014

4.6 Task Management – View Recorded Entries.

Entries recorded for a task can be viewed by clicking into the task and selecting the new 'Time Entries' tab. This screen shows the Operator, Time Elapsed, Comments and Billing Status. Records can also be edited or deleted from this screen.

4.6.1 To View Entries

Users can review recorded time directly from a task.

1. Open the required task.

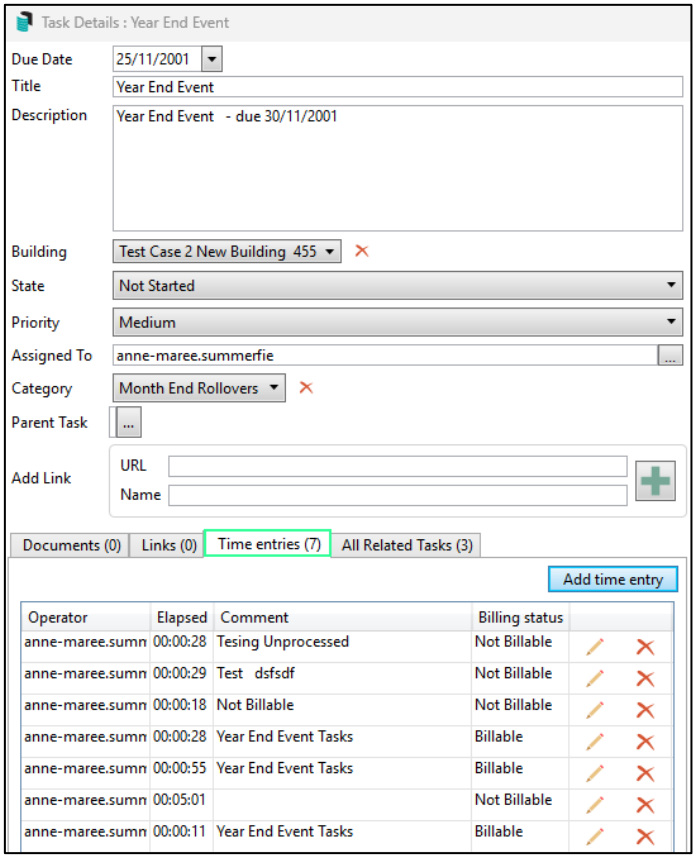
2. Select the Time Entries tab.

The screen displays:

- Operator
- Time Elapsed
- Comments
- Billing Status

Users can also:

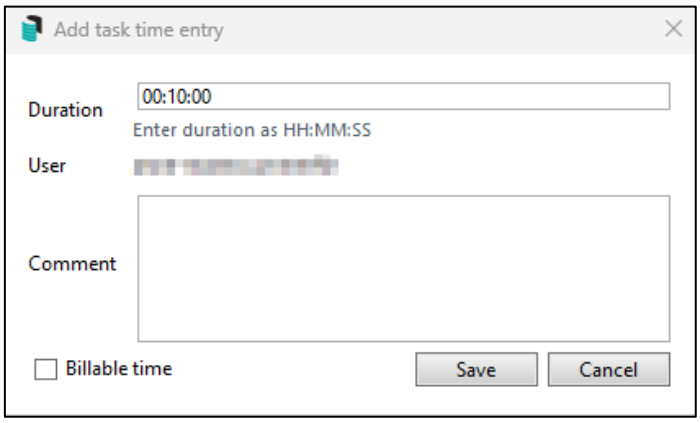
- Edit entries by clicking the edit icon.
- Delete entries by clicking the delete (X) icon



4.7 Add a Manual Entry

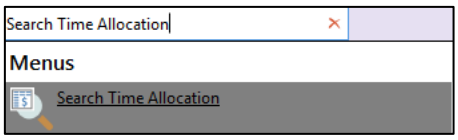
Time entries can be added manually.

1. Click Add Time Entry.
2. Enter the required details.
3. Save the entry to record the time worked.



4.8 New Search and Reporting Option - Search Time Allocation

A new search called Search Time Allocation has been added to help analyse and report on recorded task time.



4.8.1 Search Time Allocation

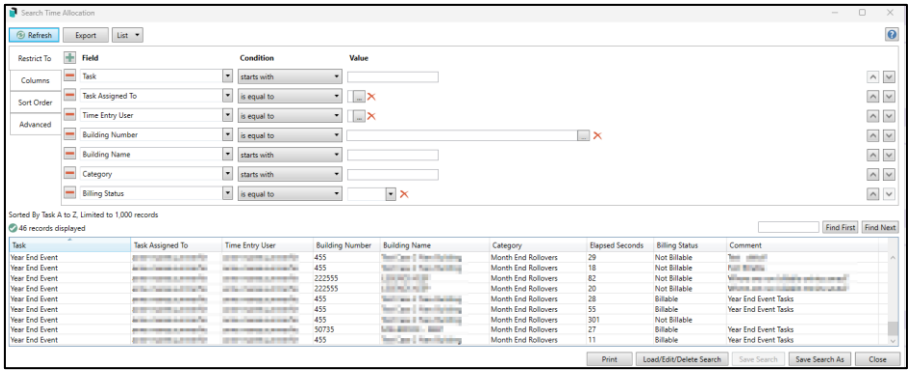
This allows users to:

- Search recorded time entries.
- Save a search
- Filter results using available criteria.
- Export results to Excel.
- Print reports

4.8.2 Available Report Fields

- Billing Status
- Building Current Year Start
- Building Current Year End
- Building Name
- Building Number
- Building Type
- Category

- Comment
- Current Building
- Elapsed Seconds
- ID
- Legislation
- Regulatory Module
- State
- Taken on Date
- Task
- Task Assigned To



5. Creditor Invoices and Scheduled Creditor Invoices

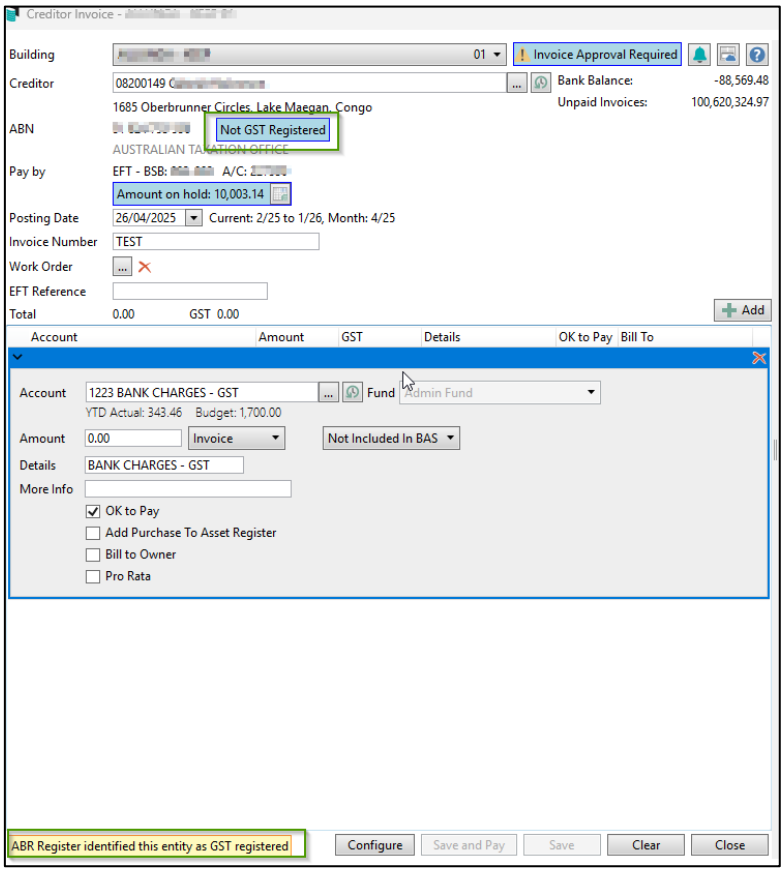
When creating a Creditor Invoice or Scheduled Creditor Invoice, the system now validates the selected creditor's ABN GST registered status and advises if the GST registration status differs from the status recorded on the Australian Business Register.

Validation messages that will display:

- ABR Register identified this entity as GST registered.
- ABR Register identified this entity as not GST registered.

-Navigate to Creditor Invoices

-Creditor selected, ABR GST status differs ABN GST registered for the Creditor



6. Payments Management – Search Payments

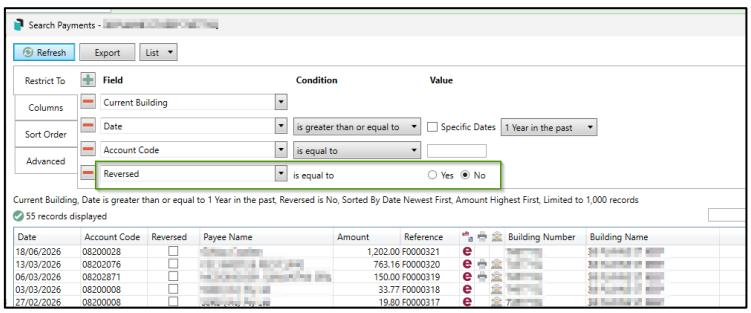
Payments Management now excludes reversed payments from the default screen view.

Search Payments now includes a Reversed column, allowing users to include or exclude reversed payments from search results. When this column is added, the default filter is set to Reversed equals 'No.'

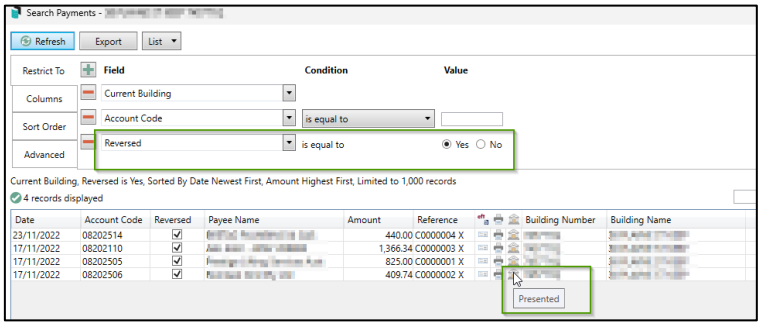
For reversed payments, hovering over the Presented column now displays a 'Presented' tooltip.

-Navigate to Search Payments

-Select Columns, add Reversed column



- Reversed equals Yes



7. Office Bearers – Mandatory Training (NSW Only)

7.1 Overview

From 1 October 2026, new and returning strata committee members in New South Wales (NSW) are required to complete mandatory online training provided by NSW Fair Trading.

To support compliance and record keeping, new training-related fields have been added to the Office Bearer Details form and are now available for reporting through Search Office Bearers.

7.2 Office Bearer - New Fields

Two new fields have been added to the Office Bearer Details form:

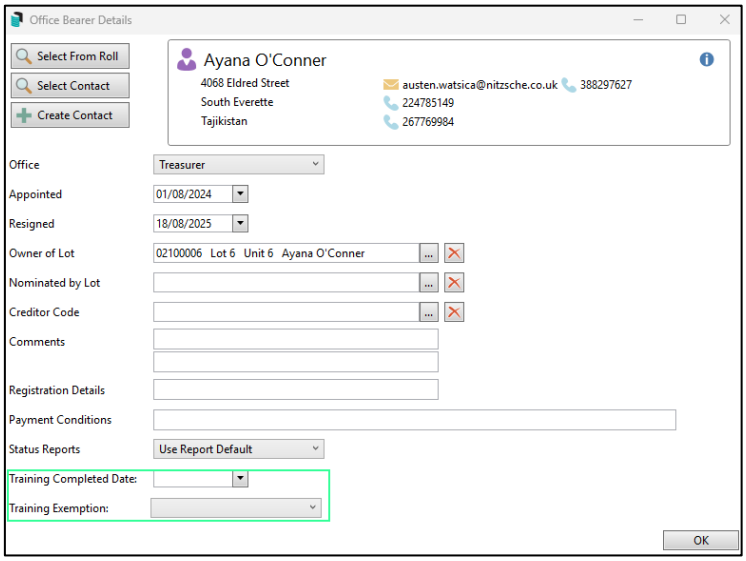
- Date of Training Completed - Records the date the Office Bearer completed the mandatory NSW Fair Trading training.
- Training Exemption Reason - Records the reason an Office Bearer is exempt from the training requirement.

These fields provide administrators with a simple way to track training compliance and exemptions for strata committee members.

To update training information for an Office Bearer:

1. Navigate to Office Bearers.
2. Select the Edit button against the required Office Bearer.
3. Open the Office Bearer Details form.
4. Complete either:
    - Date of Training Completed, or
    - Training Exemption Reason (where applicable).

5. Save the record.



7.3 Search Office Bearers – New Fields

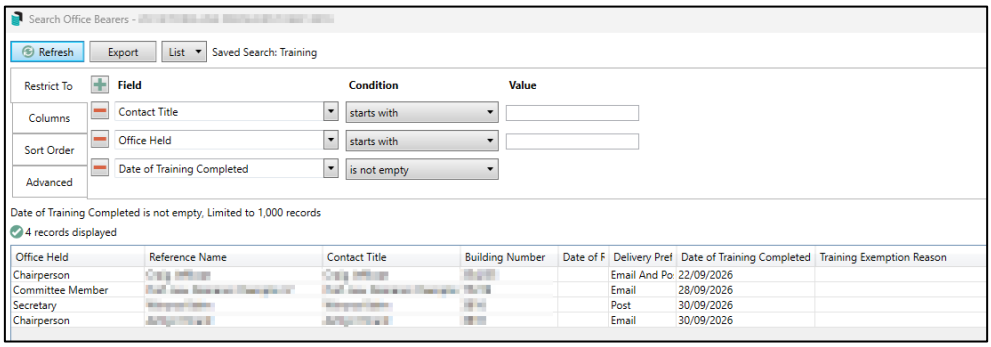
The Search Office Bearers function has been enhanced to support reporting on Office Bearer training information.

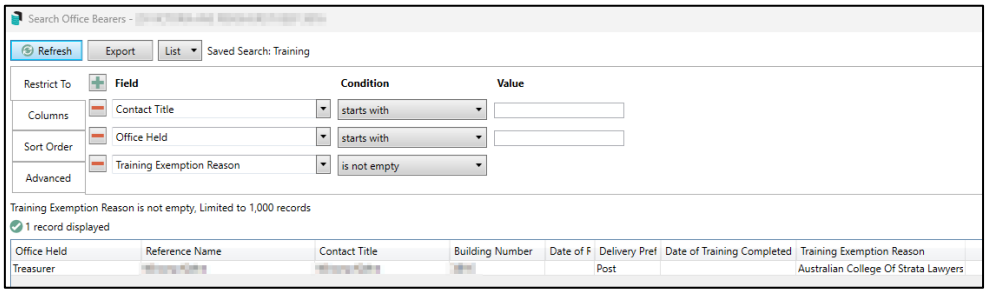
The following fields are now available:

- Date of Training Completed
- Training Exemption Reason

To add the fields to a search:

1. Open Search Office Bearers.
2. Select Add.
3. Choose the required training-related fields:
4. Date of Training Completed
5. Training Exemption Reason
6. Refresh to run the search or save the search configuration as required.





These fields can also be used in the following ways:

- Added as columns
- Added to a Saved Search
- Exported to Excel
- Exported to Print Reports

8. DocMax – Creditor Information Document Properties

8.1 Overview

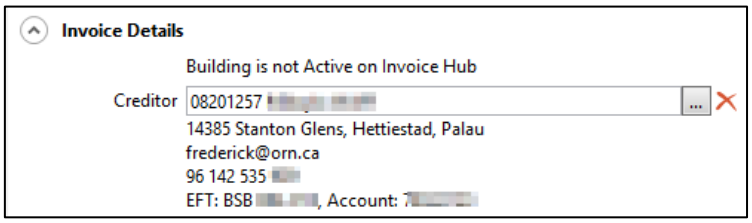
Additional information is now available in Document Properties so the user can confirm that the correct creditor has been selected.

8.2 Key Enhancement

Document Properties can now display the following creditor information:

- Creditor Address
- Creditor Email Address
- Creditor ABN

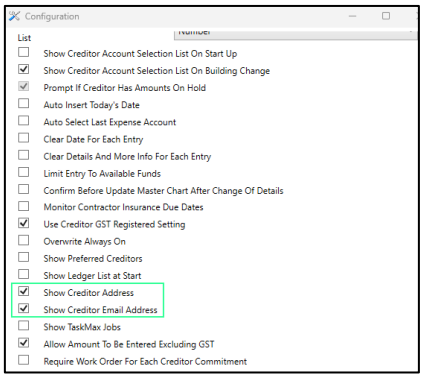
This additional information provides greater visibility and helps users confirm they are processing documents against the correct creditor record.



8.3 Configuration Requirements

The added information in document properties will only be displayed if 'Show Creditor Address' and / or 'Show Creditor Email Address' is set in Creditor Invoices configuration.

1. Navigate to Creditor Invoices.
2. Click the Configuration icon.
3. Review the following settings:
   - Show Creditor Address
   - Show Creditor Email Address
4. Enable the required options to display the corresponding information in Document Properties.



9. Merge Letters – New Levy Year fields

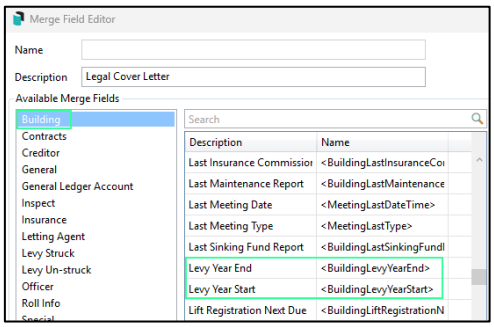
9.1 Overview

Additional merge fields are now available to support document generation within Meeting Hub and standard Merge Letters. The new Levy Year Start and Levy Year End fields provide access to levy year date information directly within document templates. These fields are available under the Building field category and can be inserted wherever Merge Letters are supported.

9.2 Applying the fields

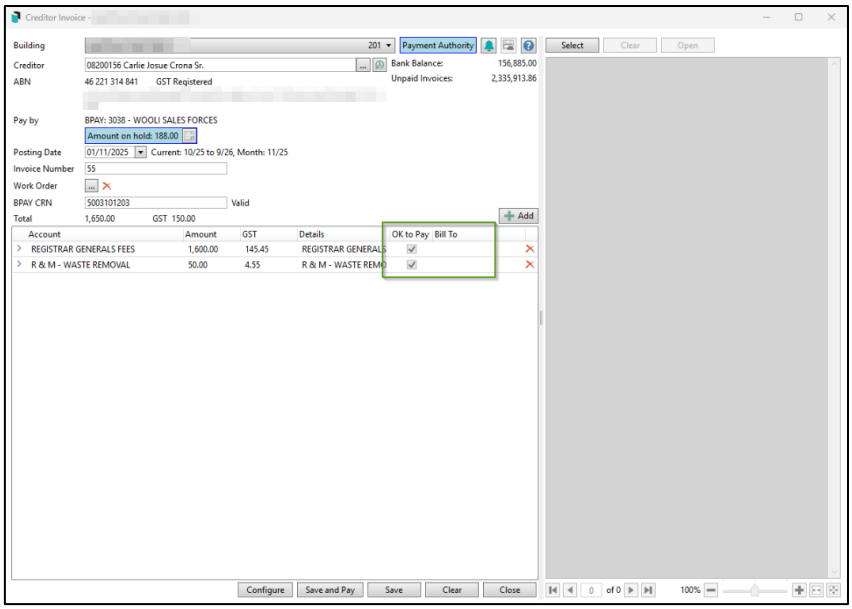
1. Open a Merge Letter template or the Meeting Hub Template Editor.

2. Select the template or document to edit.
3. Select the merge field option.
4. Click the Building field category.
5. Select Levy Year Start or Levy Year End field and click Add.
6. Save the template.
7. Add the fields to the document if using Merge Letters.
8. Generate the document to populate the field values automatically.



10. Creditor Invoices – OK to Pay

The Creditor Invoices user interface has been enhanced to display the 'OK to Pay' status, providing users with clear visibility and enabling quick verification when entering creditor invoices.



What's Better

- Report Distribution - When generating reports for the Master Chart with Send to DocMax, the system building will no longer be set on the document. This will prevent crash where master chart building is not supported in DocMax.
- Levy Management - Interim Levies will now be considered for auto populating next period levies.
- Arrears Manager - Credit Arrears Fees in Old Year – Transactions across old and current years will not be hidden.
- New Owner Information Screen - Levy Paid To dates are no longer showing invalid levies.
- Arrears Manager - Report to Excel - Overdue and balance field data output fixes.
- Creditor Invoices / Scheduled Creditor Invoices - Will no longer be accessible from Subgroups.
- Transaction List – Account selection was excluding system codes; This has been resolved.
- Cheques - Remove all support for creating cheques and presenting cheques created by the building.
- New Building Module - Entered Dates will now be Validated
- Scheduled Creditor Invoices - Insurance expense codes are now supported, and the system will no longer crash when trying to update the Premium Account.
- Search Creditor Invoices - Editing a Creditor Invoice via Search Creditor Invoices was crashing at times. This has now been resolved by not assigning new context until it is ready and checked it is still required.
- Creditor and Debtor Invoices and Arrears Notices – The preview phase has now been completed, and the old user interface has now been replaced.