

# StrataMax Release Notes Archive

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This page contains Release Notes for older updates for StrataMax. This could be helpful for clients who would like to know when a specific enhancement or change was introduced to StrataMax.

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## StrataMax Version 5.6

### StrataMax v5.6.125 Released 20th February 2025

#### Invoice Hub | Log Enhancements

- Invoice Hub logging in **Log Viewer** now includes invoice numbers when invoices are approved, retracted, or deleted.

#### Report Distribution | TRMax Recovery & Consultancy Reports

- TRMax Recovery and Consultancy Reports can now be added to Report Distribution and **Status Reports**, with configurable date ranges, operators, and charge filters.

#### Lots | Insulation Value & Status | ACT

- New fields for Insulation Status and R-Value have been added to the Lot Edit screen, supporting ACT Unit Plan Rental Certificates.

#### Building Information | Committee Election Ballot Field

- A new dropdown field allows users to specify 'Open' or 'Secret Ballot' for Committee Elections.

#### Search Local & Global Accounts | New Filters

- Additional search fields in **Search Local & Global Accounts** include Account Type, Non-Claimable Income, and Income Tax Expense Category.

#### Roll Submission | Auto Update Notice Date

- When a **Roll Submission** is accepted, there is configuration available for the Notice Date for the contact and linked lots to be updated automatically.

Note - This setting will be ticked (on) by default when updated to this version.

## Report Distribution | Split Banking for Financial Statements

- New options allow users to include or exclude Split Banking balances in financial statements when selected from **Merge Letters** / Report Distribution.

## Process Bank Statements | New Balancing Tool

- A new tool in **Process Bank Statements** helps reconcile manually entered transactions with imported bank statements for easier bank reconciliations.

## DocMax | Creditor Filters

- Users can now filter out hidden and banned creditors when selecting accounts, improving usability.

## Invoice Hub | Automated Invoice Submission

- Invoices are now automatically uploaded to **Invoice Hub**, removing the need for manual submission.

# StrataMax v5.6.124 © Released 7th February 2025

## Business Activity Statement | Balance BAS Tool

- A new feature has been introduced and is aimed at helping users identify transactions and resolve variances in the **Business Activity Statement** (BAS) screen. The Balance BAS tool provides a guide only on potential transactions that may be causing discrepancies in GST and PAYG Withholding balances.

## Invoice Hub | Automatic Upload of Invoices (Where Possible)

- A new system will be rolling out soon that will allow invoices in **Invoice Hub** to be submitted periodically with no manual effort. This option will control a specific building's ability to upload.

# StrataMax v5.6.123 © Released 28th January 2025

## Report Distribution | BAS and Income Tax Report

- **BAS Reconciliation Report** and **Income Tax Report** Building filter option 'Current Building' has been changed to 'Selected Buildings (separate report per building)' and the tooltip has been changed to 'Filter by active buildings, my buildings, management office, account manager or the selected buildings. All except Selected Buildings ignore the selected building list'.

## Certificates/Disclosures | Small and Two-Lot Modules

- **Disclosure Statements** for QLD Building Format Plan - Small and Two-Lot Modules has been activated.

## Search Creditors | New Field Filter

- A new field filter has been added to **Search Creditors** 'Hide for Selection.' If this is active it will allow filtering on creditors that are/are not hidden.

## **Status Reports | Backdating**

- **Status Reports** can now be backdated by specifying a fixed date to run the status reports.
  - Please note that this setting will not be stored and will be cleared when closing **Status Reports** screen. This change will not be set for the saved **Status Reports** on **Month End Rollovers**.

## **StrataMax v5.6.122** **Released 9th January 2025**

### **Bank Balances/Report | Enhancements**

- This release introduces several new features and improvements to the 'Bank Balances module and Reporting', Changes include:
  - expanded bank account details and investment account visibility.
  - enhanced reporting and report distribution.
  - update to the Bank Balance Template.

### **Cert 184 | NSW Legislative Change**

- NSW Legislative changes to be introduced on February 03, 2025, require a new section to be added to Certificate 184 to identify if there is an exclusive supply network established for the building and the nature of the supplied service. We have added the fields to the Certificate and made provision in Info Editor to include this information on the Certificate.

### **Bank Account Setup Changes**

- Account Title fields will now be available in the Bank Account Setup, these will replace those originally supplied by chqacntdat used for Deposit Slips and Cheques.

## **StrataMax v5.6.121** **Released 5th December 2024**

### **Creditor Info List | New Configuration**

- Enhancements have been made to the **Creditors Info List** configuration settings. A new option is now available to 'Include Hidden Creditors' which will allow users to control whether hidden creditors should be included in reports.

### **Lost Building | Building Information**

- Enhancements have been made to the **Building Information** screen 'Lost Status', to allow clients to update 'Lost' Building Information.

## Local & Global Transactions | Update Sundry EFT description

- Enhancements have been made to allow for the description of Sundry non-creditor EFT payments to be updated via *Local Transactions* and *Global Transactions*. When a description is updated, this will also reflect on the *Financial Statements Account Summary Report*.

## Local and Global Debtors Search | Enhancement

- 'Balance' and 'Old Year Balance' has been added to *Local and Global Debtors* searches and can be added as columns and search fields.

# StrataMax v5.6.120 Released 22nd November 2024

## BAS Reconciliation Report | Enhancements

- The template has been modified to allow the BAS Simple, BAS Full, PAYG Withholding and PAYG Instalments sections to be displayed conditionally based on their active status.
- The Building details section has been updated to include the Company Title field.
- The Payment Due Date has been added to each relevant section (BAS simple, BAS Full, PAYG Withholding and PAYG Instalments) giving users clear visibility of the due dates for payments associated with each section based off the BAS period end plus Configuration Global setting "Number of Days after end of a period that the BAS is due".

## Invoice Hub | Enhancements

- Users now can view invoice details when using the Invoice Submission Wizard.

## Account Maintenance | New Categories

- Enhancements have been made to assist Western Australia clients with the Provision of Information about Industry Annual Return under Section 102.

## Search Meetings

- The ability to search for Meetings is now available with this release. The new Search Meetings screen will allow users to view meeting details, create and delete meetings.

## Report Distribution | Status Reports

- Building Status Reports have been incorporated into Report Distribution. Selecting Status Reports will now open the report set in a Report Distribution screen. See page 8 in the Release Notes for a more in-depth look.

## Report Distribution | New reports Added

- The following new reports have been added to Report Distribution (see page 18 in the Release

Notes for a more in-depth look):

- Transaction List
- Financial Statements (Old)
- Creditor Aged Balance
- Unpresented Payments and Receipts
- Statement of Key Financial Information
- Cash Flow Management

## StrataMax v5.5.119 Released 7th November 2024

### Proxy Contacts & Proxy Manager Enhancements

- New functionality allows the addition of *Proxy contacts to be updated via the Roll*, including setting appointment and termination dates. The **Proxy Manager** will produce the default report with enhanced configuration options. Existing security permissions for managing proxy data are retained.

## StrataMax v5.6.118 Released 22nd October 2024

### Dashboard Report | All Buildings / All Active Buildings

- A new option has been added to the Dashboard Configuration screen, to the 'Filter Buildings' dropdown menu include *All Active Buildings* (only) or to include *All Buildings* (including inactive buildings).

### New Security Permission | Unpaid Creditors Report

- A new permission has been introduced in **Security Setup** to control access to access the **Unpaid Creditors Invoice Report**.

### Report Distribution | UI enhancements

- The 'Distribution Method' section on the **Report Distribution** screen has been updated to display the *Save Report* and *Email* settings directly on the screen. This means users can now view their preferences without needing to click the settings cogwheel.

## StrataMax v5.6.117 Released 16th October 2024

### Organisational Searches

- The ability to search across organisations for specific search has been added in this release to

allow clients with multi drives to see and edit certain details without needing to switch drives. The new searches are called **Organisation - Roll**, **Organisation - Contacts** and **Organisation - Creditors**.

- Each of these new search screens have their own permissions in **Security Setup** - simply type 'org' into the *Search* field to locate the permissions for each of the three new screens.

## Creditor Details Enhancement Across multiple screens

- When a creditor is double-clicked, the 'Creditor Details - Edit' window will appear. This new function is available from any of the following screens: **Search Creditors**, **Search Creditor Invoice Items**, **Creditors Management**, and the '**Creditor Balances**' window that appears when the '082 Creditors' line item is clicked in **Interactive Reports**.

## Transaction Search Enhancements

- The following enhancements have been made to Transaction search screens.
  - The 'Invoice Code' column has been removed as a default column from **Local Transactions**, **Global Transactions**, **Interactive Reports** and **Non-Mutual Income** screens.
  - A 'Running Balance' column has been added as a default column for **Local Transactions**, **Global Transactions**, **Non-Mutual Income**, Prepare BAS drill for GST, PAYGI, PAYGW accounts, and **Interactive Reports**.
  - 'Description' and 'Contains' have been added as a default field and condition for **Local Transactions**, **Global Transactions**, **Non-Mutual Income**, Prepare BAS drill for GST, PAYGI, PAYGW accounts, and **Interactive Reports**.

## Search Screens | Font Size Configuration

- When printing from Search screens (**Local Transactions**, **Global Transactions**, etc.) the configuration window now has 'Font Size' drop-down.

## Search Recoveries | TRMax Recoveries

- A new search screen has been introduced called 'Search Recoveries' so you can search **TRMax** recoveries by 'Processed', 'Do not Process', and 'Processed Date'.

## Search using Text

- All 'Search' screens (**Local Transactions**, **Global Transactions**, etc.) now have the ability to search for text across any column. A new text box with *Find First* and *Find Next* buttons have been added that will allow clients to locate text quickly on all search screens.
  - Users cannot search for text when looking for dates or amounts. However, numeric values can be located when they are included within the text, and the search is not case-sensitive.

## Building Information | Meeting Documents Link

- Meeting documents and supporting documents can now be linked to a meeting in the **Building**

**Information** screen, in the 'Meetings' window that appears when the *Meetings* button is clicked under the 'Meetings & Voting' header.

## Global and Local Debtors Search | Direct Debit

- A new 'Direct Debit' column has been added to **Global and Local Debtors** screens. This new feature will enable clients to search for Direct Debits that are setup.

## Search Enhancements | Transactions option

- A new *Transactions* button has been added to the following search screens to allow users to view the selected transactions: **Search Roll, Local and Global Debtors**.

## Transaction Entry | Removed

- **Transaction Entry** has been removed and 'Transaction Entry' and 'Journals' have been added as synonyms for **Journal Preparation**. Meaning when you search for 'Transaction Entry' and 'Journals', **Journal Preparation** will appear where transactions can be entered.

## Invoice Hub Refresh

- The **Invoice Hub** user interface has been refreshed to be more consistent with newer StrataMax screens and provides more streamlined options for configuration and approval defaults, approval layers, number of approvers, approval limits, and more. Open the **Invoice Hub** screen to see the changes.

## Change Code Enhancements

- The **Change Transaction Code** feature has been enhanced to ensure accurate GST reporting on the BAS when changes are made to transactions from previous BAS periods.

## StrataMax 5.6.116 Released 25th September 2024

### BCMax Logout Option

- A new logout button has been introduced to the BCMax Desktop.
- The Logout button is in the bottom right corner and displays the logged-in username.
- The Logout option is still available when the 'Remember Me' feature is enabled.

### Local and Global Accounts Search – Enhancements

- **New Search Fields:** Added 'Actual YTD', 'Budget', 'Last Year Actual', and 'Last Year Budget' fields in both **Local** and **Global Account Searches**.
  - Fields can be added to searches and columns by using the '+' and 'Advanced/Columns' options.

- **Link to Transactions:**

- A new link allows users to open related transactions from the search view.
- Selecting a transaction and clicking the 'Transactions' button opens Search Transactions mode for editing.
- Closing the Search Transaction screen returns the user to the Local/Global Accounts screen.

## BAS Reconciliation Report - Report Distribution

- The BAS Reconciliation Report is now available through Report Distribution in multiple screens:
  - BAS (BAS Status)
  - Prepare BAS
  - Search BAS
- Clicking the print icon opens the report in Report Distribution, where distribution preferences can be set.

## Search Buildings | Interest Entitlements

- A new 'Interest Entitlements' field has been added to Search Buildings.
- The new field can be added to searches and displayed as a column by using the '+' and 'Advanced/Columns' options.

## Roll | Search Functionality Enhancement

- New search fields 'Service of Notice Address' and 'Residential/Business Address' added to:
  - **Search Contacts**
  - **Search Roll**
  - **Search Office Bearers**
  - **Global Debtors**
  - **Local Debtors**
- Users can add these fields to searches using the '+' option.

## Interactive Reports | Enhancements

- Designed to review financial statements and drill down into transactions for current and old years.
- **Drill Down Enhancements:**
  - Clicking on an account code opens the Local Transactions search with all transaction details.
  - Account codes with Lot Balances and Lot Account Dissection also allow further drill down.
- **Creditor Invoice Details:**
  - Drill down for creditor invoices will now display transaction details for Local Transactions, Global Transactions, and Non-Mutual Transactions.

## Search Creditors | Email Address

- A new 'Email Address' field has been added to the Search Creditors screen.

- Users can add this field to searches by using the '+' option.

## StrataMax 5.6.115 Released 12th September 2024

### EFT Remittance Advice

- Enhancements to the REMITEFT Template now show the Payment Date and the Remittance Advice Date when reprinted.

### Log Viewer – Save Search

- Log Viewer will now offer the ability to create a saved search and add them as Dashboard items.

### EFT Manager – Email Remittance Advice

- Confirmation message added when closing EFT Manager without sending emails.
- Option to send emails later after closing EFT Manager.

### Creditor Maintenance Enhancements

- Removed "Master Chart" from the title of Creditor Maintenance in the local building view.
- Changed "Current Building Only" wording to "Include All Buildings / Master Chart."
- The default checkbox is unticked, with added tooltips.

### Report Distribution | One-time Editing of Email Details

- Subject and body of emails can be edited during the report distribution process.
- Changes are not retained after the distribution completes.

### Searches | Print Functionality:

- Ability to print various searches as PDFs.
- Columns can be adjusted for proper formatting.
- Applies to multiple search types (e.g. **Search Bank Accounts**, **Search BAS**, **Search Creditors**, **Search Income Tax**).

### Communications Log – Save and Print

- New buttons added to save and print searches within the **Communications** Log.
- Includes functionality for saving, editing, deleting, and loading searches.

### Creditor Maintenance - BPAY CRN

- BPAY CRN now available in **Creditor Maintenance** for a local setting.
- The CRN will be populated in **Creditor Invoice** Entry and **Building Information** fields.

### Journal Preparation Enhancements

- Added the option to set frequency for recurring journals (e.g. Weekly, Monthly).
- Ability to select or change tax codes.
- "On Hold" journals can now be marked and excluded from posting.
- Auto reverse journals now have a date selection for reversing.

## StrataMax 5.6.114 Released 29th August 2024

### Security Set-up | StrataMax Application Only

- The **Security Setup** screen now has a new column titled 'Application Access Only.' When users have been allocated access to 'Access to StrataMax Application Only' column will be flagged 'Y.'

### EFT Manager | Back To Authorise

- We have added the ability to go back from the 'Email Remittance Advice' screen to the 'Authorise' screen where it may be required to ensure Authority has been sent.

### Building Information | Building Status

- Moving buildings from 'Lost' to 'Active' will no longer be accessible to users in **Building Information** and will only be available to Support override logins. Please contact the Support team if there is a building that needs to be set from 'Lost' to 'Active'. Setting new, inactive buildings to 'Active' has not been changed.

### Dashboard | Add Item Sort Order

- In the **Dashboard**, **Add Item** report selection will now be displayed in alphabetical order to make the report list easier to look through.

### Process Bank Statements | Bank Reconciliation

- A new screen will be presented in **Process Bank Statements**, which can be accessed from the red icon/button next to the variance in **Process Bank Statements**.

### Security Setup | Edit permissions sort order

- The **Security Setup** screen will now have the permission categories for BCMAX, GLMAX and DocMax displayed in alphabetical order.

### Creditor Invoice | Invoice number

- We have added the ability to update the Invoice number via the **Search Creditor Invoice items**, **Local Transactions** and **Global Transactions** screens.

### New Validation | Saving a Creditor where the contact has a pending bank account approval

- An optional workflow for managing creditors and contact bank accounts entered into StrataMax was released in Version 5.6.113 (see below). This feature is designed to help manage the workflow where users enter or amend bank details and an approver views and validates the new bank account details for the creditor before paying any invoices.

## StrataMax 5.6.113 Released 22nd August 2024

### Communications | New Security

- New **Security Setup** permissions added for managing the 'Pause Messages by Default' and 'Delay Messages' settings.

### ACT Unit Titles Certificate | Certificate Amendments

- Updated to comply with new legislation requirements, the certificate now includes fields for recording Embedded Network Provider details.
- The title was changed from 'Unit Title Certificate' to 'Unit Title Sale Certificate', and section numbers were removed from subheadings.

### Report Distribution Enhancements | Save as a Single File

- Two new save options: 'Save to DocMax' for storing distributions as a single file in DocMax and 'Save to Disk' for saving as a single PDF file. These changes affect BCMax Report Distribution and Meeting Hub Meeting Distribution.
- The default setting changed to have 'Separate Attachment' unticked for distributions with multiple attachments.

### Local and Global Transactions | Change Code Retention

- When changing transaction codes, the last selected code will now be retained and available per user, designed to enhance the experience when processing multiple code changes.
- Updates in **Local Transactions** will now refresh automatically without needing a manual refresh.

### GLMax Enhancements | System Integration

- GLMax companies have been renamed from COMPx to GCOMPx to streamline integration with StrataMax.
- GLMax and StrataMax creditors and debtors use the same **Creditor Maintenance** and **Debtor Maintenance** contact areas to enhance consistency between both areas.
- GLMax and StrataMax use the same **Account Maintenance** menu to manage account codes.
- GLMax invoices and reports are now stored in **DocMax**, enhancing document management.

### Bank Account Change Approval Process

- A new workflow has been introduced for managing changes to creditors or contact bank accounts.
- Includes the ability to view old and new bank account details, record time-stamped notes, and attach documents.
- Security settings allow for detailed control over approval processes, including permissions for confirming and approving bank account changes.
- A new dashboard item will monitor and manage pending bank account changes.

## Payments | Exclude Unverified Bank Accounts

- An option was added to exclude creditors with unverified bank accounts from **Payments** processing if the bank account change approval is pending.
- Periodic payments will change status to 'Unauthorised' if an unverified bank account is associated with a creditor. Once the periodic payment has been authorised, it will be processed regardless of whether it is approved in StrataMax.
- **Creditors Management** now includes a new search field and column to assist in identifying creditors' unverified accounts. This field will run in conjunction with the *Has Balance Issues* field.

## Business Activity Statement (BAS) Enhancements

- A new user interface with advanced filtering options will be introduced to improve the navigation and visibility of BAS and IAS statements.
- Allows for efficient preparation and finalisation of BAS statements, with options to filter by building, status, and due dates.
- Improved accuracy with the ability to view and adjust transactions before finalising statements.
- New search screens and reports are included.
- **Security Setup** is available to control access to the various areas relating to the **Business Activity Statement** areas.

## Income Tax Reporting | Module Enhancements

- New module for preparing and finalising Income Tax Reports, including enhanced visibility and filtering options.
- Advanced features allow sorting by building or management office and displaying statuses for pending or completed reports.
- Streamlined interface and workflow with improved accuracy with the ability to drill down into transaction details.
- **Non-Mutual Income** search available.
- New settings are available in **Account Maintenance** to control the Income Tax category.
- Security Setup is available to control the various areas available for **Income Tax**.

## Pay Employees | New Module

- Introduces a module for automating wage payments and superannuation processes, including

recurring transactions.

- Allows for the setup and management of employee payments with a status dashboard showing due wages.
- **Search Pay Employees** search available.
- **Security Setup** is available to control access to the 'Pay Employees' module.

## Bank Balances | User Interface Enhancements

- The enhanced **Bank Balances** module will show detailed breakdowns of all bank accounts based on building configuration.
- Displays information such as available funds, overdrafts, GST, PAYG, and more, providing a clearer financial overview.

## Account Group Setup | Building Information Changes

- Enhancements allow for separate or consolidated setups for GST and Income Tax reporting.
- New options in **Account Group Setup** and **Building Information** to select consolidated or separate BAS and Income Tax Reports.
- It provides flexibility for users in managing account group registrations and reporting.

## StrataMax v5.6.112 © Released 30th July 2024

### Search Insurance Claims

- A new search icon and screen have been introduced called **Search Insurance Claims** and will allow users to search for **Insurance Claims**.
- This also includes a new **Dashboard** item that can be placed on the StrataMax desktop.
- A new menu item is also available in **Security Setup** for this new search screen.

### Data Health | Option to remove historical financial years

- A new option has been added to the Data Health Dashboard to allow clients to manage how many historical financial years of data they would like to keep.

### Search Creditor Invoice Items | Invoice Hub Status

- **Search Creditor Invoice Items** now includes a new column and search filter called 'Invoice Hub Status'.

### Dashboard | No. Days Oldest payment remains Unpresented (cheque only)

- The **Dashboard** item called 'No. Days Oldest Payment Remains Unpresented (cheque only)' has been updated to include a new configuration option to only show unprinted cheques.

### Account Manager | Logging

- In **Building Information**, when the *Copy value to other buildings* button is used on the 'Account Manager' field, the system will now log the changes made.

## Roll | Change of Ownership

- When a **Change Of Ownership** is carried out in the **Roll** screen, and the officer is resigned the system will now add a log for selections made and can be searched for in **Log Viewer** with the 'OFFICER.LOG' Category.

## DocMax | Synchronise All and Synchronise Selection

- In the **DocMax Online Portal Uploads** screen, the 'Synchronise All' and 'Synchronise Selection' buttons have been removed as these operations are now automated. The synchronisation happens automatically and documents should be available on the Portal within a few minutes. Note, however, if on the rare occasion there is a delay, it will be because there are multiple building uploads happening at the same time.

## DocMax | Setting/Tick Box for DropBox

- A new tick box has been added in **DocMax Settings** called 'Keep StrataMax open in background to process DropBox documents'. This will keep the StrataMax system try icon open when the StrataMax is closed, and provide a more stable experience for users who have an active DocMax DropBox enabled and running.

## StrataMax v5.6.111 Released 18th July 2024

### Security Permissions | Tag Paid Invoice & Invoices Hold/Unhold

- Security permissions are now available in Security Setup to allow or prevent users from placing an invoice on or off Hold, unticking the Hold checkbox for each invoice or tagging paid invoices in Tag Paid Invoices button. The permissions will apply to **Creditors Management**, **Search Creditor Invoice Items** and **Payments**.

**Please note:** on update to this version, permissions set for Creditors Management will be copied to the new hold permissions.

### Meeting Hub | Document Distribution screen replacement

- The Meeting Hub Document Distribution screen has been replaced with the StrataMax Report Distribution screen to provide all the current functionality.

### Merge Letters | ACN Merge Field

- The Australian Company No. has been added to the merge field editor to allow for the ACN to be added to the merge letter and the Meeting Hub Template Groups.

## Search Insurance

- A new search icon and screen have been introduced called **Search Insurance** and will allow users to search all insurance details such as the Broker, across multiple buildings.

## StrataMax v5.6.110 © Released Thursday 4th July 2024

### Debtor Adjustments | Reverse Interest

- When reversing interest using **Debtor Adjustment**, the reversal actions will now be logged so users can clearly see who credited overdue interest and easily viewed in the **Log Viewer** with the *Category* value called 'Debtor Adj'.

### Search Office Bearers

- A new search icon and screen have been introduced called '**Search Office Bearers**', and will allow users to search for Office Bearers across multiple buildings.

### Search Screens | Log Viewer

- All searches that are exported to excel will now be logged in the **Log Viewer**. The log will report the Date/Time, Username, Description and Building, Category.

### New Icon Updates

- Icons for the following searches have now been updated: **Local and Global Debtors**, **Search Local and Global Accounts**.

### Debtor Maintenance (Second Debtors) | Enhancements

- **Debtor Maintenance** user interface now has the ability to double click a record to open Debtor Maintenance for a selected Debtor.
- Users can now search new fields, Debtor Name, Lot Number, Account Code, Telephone and Email using the Local and Global Debtors, Debtor (Second Debtors) Main and Subgroup, Applicant Maintenance, and Debtor Maintenance.

### Roll | New Validation

- Validation has been added to the **Roll** Edit Screen' when Name and Address title 1 are exactly the same so that if data is entered into Address Title 2 the user is advised.

### Transaction Code Change Replacement

- **Transaction Code Change** has been removed and the functionality will now be available in the **Local Transactions** and **Global Transactions** screens.

## Payments | Creditor Balance

- Enhancements have been made to report a creditor as out of balance instead of picking up journals that were done to reverse a creditor invoice from the old year when making payments.

# StrataMax v5.6.109 Released Thursday 20th June 2024

## Search Payments | Recovery Created Field

- A new field has been added to [Search Payments](#) to search and review recovery charges created, if the Payments options are enabled in the [Disbursements](#) icon.

## Creditor Maintenance | ABN Validation

- [Creditor Maintenance](#) has been enhanced to validate the ABN if entered and prevent ABN Exempt from being set if there is a valid ABN for the Creditor.

# StrataMax v5.6.107 Released Thursday 6th June 2024

## Contact Management | Merge Contact View

- The [Merge Duplicate Contacts](#) function has received a UI enhancement to include contact data fields, which can then be compared between the two contacts.

## New Debtor Searches

- Two new search screens have been added to search for debtors, including the [Roll](#) and [Second Debtors](#). These are called [Global Debtors](#) and [Local Debtors](#).

## Creditor Searches Enhancements

- In [Search Creditors](#) and [Creditors Management](#), a new column has been added to the search results table.

## New Search | Account Codes

- New searches have been created, [Search Local Accounts](#) and [Search Global Accounts](#). These searches allow users to search a displaying of account codes.

# StrataMax v5.6.106 Released Wednesday 23rd May 2024

## Security Setup | Account Maintenance

- The **Security Setup** permission 'Add/ Change/ Delete' has been renamed to 'Account Maintenance' in BCMax and GLMax.

**Note:** Only the name has been changed. Permissions will remain as previously set for Add / Change / Delete.

## Financial Statements - Account Summary | Account Group Buildings

- Enhancements have been made to include the ability to select a specific Account Group when running the Account Summary Report in **Financial Statements**.

## Report Distribution

- Improvements have been implemented to the **Recipient Type** selection process, allowing for tagging all, untagging all or manually selecting Recipient Types. This checkbox is available throughout StrataMax:
  - **Communications**.
  - **Bank Reconciliation** – Reverse Receipt selection.
  - **Bank Reconciliation** – Match to Unpresented Screen.
  - **Transaction Report Manager** – bottom selection panel.
  - **Process Recoveries** – Select Building area in GLMax.
  - **Meeting Hub** – Merge Letter attachment selection.
  - **Roll** – Transfer Agent Portfolio option.
- A new 'Owner' **Recipient Type** has been added to Report Distribution and **Communication** modules. This feature allows users to send or email reports exclusively to owners, regardless of whether a lot has been marked for correspondence to be sent to an agent.

## StrataMax v5.6.105 Released Thursday 9th May 2024

### New Icon Enhancements

- Cosmetic changes have been implemented to some of the individual icons, replacing the originals, making them more relevant and identifiable for the function and screen that they represent.
- The **Dashboard** and Notification Bell has changed.

### Security Setup | Enhancements

- Enhancements have been made to the **Security Setup** user interface to be more consistent with the new BCMax style screens. Other enhancements include the ability to show or hide disabled users and the ability to toggle the column headers to display data in alphabetical order.

## StrataMax v5.6.104 Released Friday 26th April 2024

### Payments | Enhancements

- Enhancements have been made to alert users if there are more than one user processing payments at the same time, changes include:
  - If all payments are paid in the session the screen will move to the Summary screen.
  - If all payments are not paid, you will remain on the payment screen and show a PAID icon on any payment that has been paid.
  - Any payment that could not be paid because another user paid it, will show a warning message
    - Invoice outstanding balance has changed - payment not saved*
  - If any other error occurs, then a yellow icon will appear, and the system will stop on that building. The user can click process again to continue with the rest of the batch

## StrataMax v5.6.102 Released Tuesday 9th April 2024

### Utilities | Emailing Remittance Advices

- Enhancements have been made to allow remittance advices to be emailed to a utilities contact when a *refund is processed via Utilities* and authorised via **EFT Manager**.

### Search Building | Meeting Fields

- Additional fields available in **Building Information** for meetings have been added to **Search Buildings** for both 'Next Meeting' and 'Last Meeting'.

## StrataMax v5.6.101 Released Thursday 28th March 2024

### Search Roll

- A new 'Search' screen has been created to search **Roll** contact details more easily and replaces the *Owner Extract Report*.

### Search Contacts | New Field | 'Is A Current Owner'

- A new search field has been added to the **Search Contacts** screen, called 'Is A Current Owner' and will allow contacts to be filtered by status as a current or non-current owner.

### Opening Balance Setup | UI Enhancement

- The **Opening Balance Setup** screen has been enhanced to highlight the line that the user is entering data in, making it easier to identify the line the user is on to reduce the chance of error.

### Creditor Invoices & Creditor Management | Edit Description

- Users will now see an 'Edit' option in the UI, in the **Search Creditor Invoice Items** and **Creditors**

**Management** screens. This allows users with permissions to edit descriptions on transactions.

## New Configuration | Allow Cheques

- A new setting has been introduced to prevent cheques being used for creditor payments by mistake due to the 'Pay by EFT' setting not being ticked in **Creditor Maintenance**. This setting is available in the **Payments** and **Payment Entry** screens.

## Payments | Current Building

- A new radio button has been introduced to select the 'Current Building' in the **Payments** screen.

## Payment Entry | Enhancements

- The **Payment Entry** screen has a new drop-down menu for instances where a debtor/owner has been selected in the *Account* field. This will allow the user to select the specific contact when there are multiple contacts for a single lot.

# StrataMax v5.6.100 Released Thursday 14th March 2024

## Creditors Management

- A new **Creditors Management** module is a central screen providing access to preview all creditor invoices that have been entered into StrataMax. This screen adopts a similar design to the different Search screens already available throughout StrataMax.

## Payment Entry Enhancements

- Enhancements have been made to enhance **Payment Entry** to allow users to refund or reimburse a Debtor or Expense code and enter BSB and Account Numbers or, BPAY details manually. The debtor no longer has to have the BSB, and account number set up to create a refund. This is covered in more detail on page 19 in the release notes.

## Payments Management

- **Payments Management** has been enhanced to allow users to enter a new Remittance Advice and Internal notes. This is covered in more detail on page 24 in the release notes.

## Payments

- The **Payments** screen has been completely redesigned and enhanced, and now offers a detailed overview of unpaid invoices, displays bank balances for each Fund and provides tools for effective payment management, including actions like marking invoices on or off hold, making part payments prior to the uploading the payments to the bank via **EFT Manager** screen. This is covered in more detail on page 26 in the release notes.

## EFT Manager

- Enhancements have been made to the **EFT Manager** screen. These changes are visible once a batch is selected and the 'Print and Authorise' screen appears. This is covered in more detail on page 32 in the release notes.
- Once payments have been authorised in **EFT Manager** there is a new button available to *Email Remittance Advices*. This is covered in more detail on page 34 in the release notes.

It is recommended to update the email template for EFT Remittance Advices in *Email Template Manager* once updated.

## Cheques Printing

- A new screen called **Cheques Printing** has been developed for printing cheques after a payment has been processed using the new **Payments** screen or **Payment Entry**. This is covered in more detail on page 36 in the release notes.

## Search Creditor Invoice Items

- This new search called **Search Creditor Invoice Items** is now available and can be used to find a specific invoice. This is also where it can be placed 'On Hold', and where you can locate the *Tag Paid Invoices* button. This is covered in more detail on page 37 in the release notes.

## Search Payments

- A new search called **Search Payments** is now available and can be used to find a specific payment using a large number of different fields for an individual Buildings or available to search globally. This is covered in more detail on page 43 in the release notes.

## Bank Reconciliation Banking Legends

- Local and global legends have been enhanced so that a legend can look at the reference field in the statement data instead of or as well as the description. The ability to set Details or Reference fields to 'Do Not Compare' has also been added. This is covered in more detail on page 46 onwards in the release notes.

## Emailing Remittance Advice | Remittance Email Address

- Enhancements have been made to editing contact cards so that a specific email address can be added to use for emailing remittance advice notices. This can be done in contact cards for creditor, second debtors or owners. This is covered in more detail on page 48 onwards in the release notes.

## StrataMax v5.6.99 © Released Thursday 29th February 2024

### Account Maintenance - Export

- Additional fields such as the Update Code and Non-Mutual Income have been added to the [Account Maintenance Export](#) Report and will include any Hidden or Restricted account codes in the report.

### Web API - Body Corporate Name

- The "BodyCorpName" field has been added to the Building Info query. This will produce the Body Corporate Name in the building.

### Creditor Maintenance - Creditor Compare

- Enhancements have been made to the Creditor Compare screen, which is now located in [Creditor Maintenance](#). Creditor Compare will report duplicate or unused Creditors and allows the accounts to be merged, hidden or deleted. This tool is useful if a property has been transferred from another StrataMax Manager.

### Communication & Report Distribution - Select/Deselect Option

- Enhancements have been made to [Report Distribution](#) and [Communications](#). The options 'All & None' are available to quickly and easily select all or no contacts. This will give you more control over Contact selection as an alternative to keyboard shortcuts and all Contacts being pre-selected.

### Search Enhancements

- The Username field in [Log Viewer](#) now has a drop-down value to select from a picklist.
- [Search Bank Accounts](#) now includes the Condition option to the Field 'TD Maturity Date' - Next 7 Days or Next 30 Days.

## StrataMax 5.6.98 © Released Thursday 15th February 2024

### Search Contacts

- A new search screen and menu icon has been added to simplify searching for contacts. The search allows for filtering using multiple contact fields and will search across all buildings.

### API Enhancements

- Contact ID has been added to the [Office Bearers](#) table to identify which specific contact from a lot is the [Office Bearers](#).

### Save Searches as Dashboards

- Enhancements have been made to 'Saved Searches' to enable a user to flag a particular search to be viewed on the individual user's **Dashboard**. An Additional option 'Add To My Dashboard' has also been added - see page 4 in the release notes for more details.

## StrataMax 5.6.97 Released Wednesday 31st January 2024

### Master Chart | Creditor Maintenance

- Enhancements have been added to the **Creditor Maintenance** screen, in the **Master Chart Building** to 'bulk' copy a creditor to multiple or all buildings.

### Account Maintenance | Adding a new code

- When adding a new code to a local building the code will now be added to current and old year. This will allow users to select the new code in the old year via **Journal Preparation** and **Budget Update**.

## StrataMax 5.6.96 Released Thursday 18th January 2024

### Creditor and Debtor Maintenance Enhancement

- **Creditor Maintenance** and **Debtor Maintenance** has been enhanced to incorporate **Contact Management** which will allow creditors and debtors to use the new contact cards in main buildings and subgroup buildings.
- **IMPORTANT:** The security setting for editing Bank Accounts is now called **Add or Edit Contact Bank Account**. This is the setting now used for all contact types, including Creditors. Prior bank account permissions for Debtors / Creditors are no longer applicable and will be removed soon.

### Applicant Contact Cards

- The Certificate Applicant menu has been renamed to **Applicant Maintenance** to better reflect its purpose. Certificates, Insurance, Developer, Audit, Bank Audit and Debt Collection Applicant contacts have been migrated to **Contact Management** cards in this release.

### Data Links

- **Data Links** will now be automatically added when setting up a Subgroup where all or selected lots are emulated. A new interface will be presented when viewing Data Links for a lot or building.

### New Account Maintenance Screen

- 'Account Maintenance' has replaced **Add / Change / Delete** in Master Chart, Base and local buildings. Extra validation has also been added to prevent account errors.

## Communications

- The **Communications** screen will now use the 'Report Distribution' interface to set recipients for all contacts and will allow filters as per *Report Distribution* configurations.

## Building Lock Enhancements | Lock Reason Custom Text

- The *Add Building Lock* screen will now present a 'Lock Reason' field to advise why a building has been locked. The screen will also show if a building has been locked by the system. For example, if a Month End Rollover has failed the lock reason show "Month End". If custom text has been added at the time of lock, this will be displayed in the Lock Manager Screen.

## Saved Search Enhancements

- Existing saved searches settings and name can now be edited after they have been created to more easily manage changes. Once loaded, the title of the selected search will now be displayed in the Search Log screen.

## Security Setup Permissions | Prompt

- The "Prompt" option has been removed from **Security Setup** permissions right-click menu.

## API Enhancements

- When a User Message Exception is thrown in the code, we have placed the user message in the response body and header to provide further information as to why the request failed.

## Removed Items

For more info on each of the below, please refer to page 24 of the release notes.

- Master Chart Filter
- Second Debtor Setup
- Convert Officer / Owner to Creditor
- Direct Debit – Edit Bank Account
- Certificates – Save Applicant Data

## StrataMax 5.6.95 Released Thursday 14th December 2023

## New Search | Search Levies

- The ability to search & report levy information for a building has been included in this release. This search will return levy data based on the search criteria selected.

## Merge Letters | Local/Building Letter option

- A new option has been added to **Merge Letters** to allow users to set a merge letter to be specific to

a building.

## StrataPay Deposit Slip | New Australia Post Biller Code

- StrataPay Deposit Slips have been updated to comply with Australia Post specification requirements to reflect our newly issued Australia Post biller code - \*3599.

## Receipt Entry | Configuration

- A new configuration setting is now available in [Receipt Entry](#) that allows users to allocate interest last, on a per-building basis or globally.

**Please Note:** This setting will not override the QLD Interest allocation rule.

## Global Transactions | Default Building Number & Name & Enhanced Search

- We have enhanced Global Transactions to default the first two columns as Building Number and Building Name.
- The Global Transactions Search has been enhanced to return data based on the new search conditions 'Is Any Of' and 'Is Not Any Of' for Account Code, Invoice Code and Fund Code criteria. To see the new search use the following steps.

## API Enhancements | GLMax Debtor Query & Update Contacts

- Relevant for clients using API.

## StrataMax 5.6.94 Released Thursday 30th November

### EFT Manager | Batch information

- [EFT Manager](#) now shows 'Batch ID' and 'Batch Start Date' on the 'EFT Manager - Summary' screen for started batches, aiding users in quickly identifying the newest batches awaiting approval and finalisation.

### Local and Global Transaction Searches | Enhancements

- The [Local Transactions](#) and [Global Transactions](#) screens have been upgraded to include a 'Year' field.
- Additional new fields have been introduced in both [Local Transactions](#) and [Global Transactions](#) to provide users with enhanced information.

### Qld Disclosure Statement | Last Year S/F Balance

- An enhancement has been introduced in the [Info Editor](#). Users can now input a figure, which will be displayed in the corresponding section of a [Disclosure Statement \(Qld Certificate\)](#) when no financial year is available.

## Process Bank Statements | Additional filters

- New filters have been introduced in the [Process Bank Statements](#) screen.

## Roll Forms | Western Australian Legislative Change

- [Roll Forms](#) for Western Australian clients have been updated to reflect the legislation change from Section 35A to Section 105.

# StrataMax 5.6.93 Released Wednesday 15th November

## Transaction Search | Global and Local Transactions

- The 'Is Mutual Income' has been updated to report as 'Is Non-Mutual Income' now.
- A new field, 'Running Balance', is now accessible, enabling users to search and generate running balance reports on the search similar to the old Transaction Search reports.

## Strata Hub | Reporting

- Annual Uploading is available after entering the last Annual General Meeting data in [Building Information](#), data can be uploaded to the Strata Hub Portal for individual buildings, those associated with a specific Account Manager, those with pending reports or all buildings.
- Enhancements have been added to allow charges for Strata Hub Updates to be recorded and charged using [TRMax](#) Disbursements.
- Added ability to update a current Strata Hub Report.

# StrataMax 5.6.92 Released Thursday 2nd November

## Centralised Login | Access to StrataMax Application Only

- We have added the ability to allow access to StrataMax without providing access to the StrataMax Portal; for use in circumstances where Portal Access is not appropriate – for example Third Party Access - Search Agent / Auditor / Accountant.

## New Searches

- There are now two new searches available **Global Transactions** and **Local Transactions**, which replace Search Transactions & Search Transactions (All Buildings). Security Permissions have also been updated.

Please Note: Local and Global Transaction searches will also be available in GLMax without Fund/OC field options.

## BING Mail Settings

- The BingMail Settings have been changed from user level settings to Global settings. Also when re-sending a prior job from the Report Distribution Log the recorded BingMail settings for duplex, hold and Colour model will be used.

## StrataMax 5.6.91 © Released Thursday 19th October

### Print Deposit Forms | Interface Enhancement

- The **Print Deposit Forms** screen has been enhanced with a new interface more consistent with new StrataMax screens and to provide a more streamlined approach to completing deposit slips.

### Certificate 40

- The Certificate 40 (CERT40) has been enhanced to the new style of templates.

### Communication warning Emails

- A new warning message has been added to the **Communication** screen where there are more than 20 Recipients.

## StrataMax v5.6.90 © Released Thursday 5th October

### Roll List / Roll Form | Notification Configuration

- The **Roll Form** and **Roll List** reports now have the option to include a building specific notification message (available for Roll List 1 only at this time).

### Report Distribution | Levy Notice Title & Text Configuration

- Levy Notice Title and Levy Notice Text can now be configured in Report Distribution, which will output to specific Levy Notices (available for LNOTE\_104a only at this time).

### Report Distribution | Aged Balance Report Configuration

- Enhancements have been made to the **Aged Balance Report** configuration to add the ability to configure the report to output in code order or output in name order.

### Meeting Hub | New Committee Fields

- New Committee fields have been added to provide sorting order on Committee Member Templates. The new fields are Committee Member Given Names and Committee Member Surname which will allow the user to sort Committee Members in the merge field by surname.

### Email Template Manager

- The **Email Template Manager** list has been enhanced to display templates in alphabetical order.

## StrataMax v5.6.89 Released Thursday 21st September

### StrataCash Hub | Periodic Payments - Creditor List

- Preferred Creditors & Inactive Creditor Filters are now available in the Periodic Payments Creditor Account Selector.

### Search Inspections

- A **Search Inspections** feature has been added which is available to search for all Inspection Type information such as upcoming due dates and export to excel.

### Search Transactions (All Buildings)

- A **Search Transactions (All Buildings)** feature has been added which is available to search for all Transactions across selected buildings or the full portfolio and export to excel.

**Please Note:** It is recommended to create & save searches for global reporting requirements to replace previously used Global / Group Reports.

## StrataMax v5.6.88 Released Thursday 7th September

### Email template Manager

- Access to the **Email Template Manager** will now be available from the StrataMax Desktop Search or can be added to the desktop as a stand-alone menu icon.

### Search Transactions | New Search Fields and Conditions

- The **Search Transactions** screen has received new fields and further list options have been added too.

### Search Buildings

- A **Search Buildings** feature has been added which will allow fields from **Building Information** to be searched across all Buildings and exported to excel.

### Invoice Printing | DDR message (Field 60)

- The Direct Debit message (Field 60) has been activated for Invoices.

## StrataMax v5.6.87 Released Thursday 24th August

## Centralised Logins | One-time Access Codes for Managers

- For the *centralised login feature*, a one-time access code can be generated to provide limited access to temporary users such as search agents.

## DocMax | Notes Text Wrap

- Enhancements have been made to the 'Notes' section in **DocMax**, under the **Document Details** section for documents. The highlighted notes section will now wrap text to allow more visibility to the user.

## Search Selection Filters

- Enhancements have been made to separate out selected items from the selection of the item when doing certain searches. This applies to **Building Information**, Search screens, **DocMax** Creditor Search.

## Meeting Hub Document Generation | New Field

- A new merge field 'GST Registered' has been added to the merge field selection list for *cover letters in the Documentation Distribution* screen.

# StrataMax v5.6.86 © Released Thursday 10th August

## Report Distribution - Use BING for Email - Security Setting

- **Security** has been added to manage access to the 'Use BING for Email' setting in **Report Distribution**.

It is recommended to review this **Security Setup** setting on update to this version.

## Interactive Reports

- We have introduced logging in **Log Viewer** for **Interactive Reports** as well as a Security Setup permission.

It is recommended to review this **Security Setup** setting on update to this version.

## Bank Account Setup - Other Investment Account

- The *Other Investment Account* in **Bank Account Setup** will be disabled for SCM accounts as the statement data is downloaded automatically.

On update, any SCM account set to *Other Investment Account* will be deactivated and set to *Import and Reconcile*.

## Aged Balance Report - New Template Utility Second Debtors

- A new template is now available for the **Utility Billing Aged Balance List** 'SABLIST1 – Second Debtors

'Aged Balance List Template'. This template outputs the 'Email Address' and date of the most recent Utility Invoice rather than the last arrears.

## StrataMax v5.6.85 Released Thursday 27th July

### Merge Letters - Show All Reports

- A new tick option has been introduced in **Merge Letters** to view all reports by unticking Merge Letters Only.

### Merge Letters - Change of Details

- When a change of details is completed in the **Roll**, we have added the ability to create a Report Set with no Merge Letter included with the Change of Details reports.

## StrataMax v5.6.84 Released Thursday 13th July

### Management Fees Setup

- A new column has been added to the **Management Fee Setup** screen to display the percentage increase if set, as well as all fields now being available to report from the **Management Fees Report**.

### Report Distribution - Simple/Advance

- The option to view in Simple or Advance mode has been added to internal reports such as Roll List and Entry Report.

### Roll - Change of Ownership

- Enhancements have been made in the **Roll** to provide an option during a Change of Ownership to keep the StrataPay Reference Number and some of the original owners due to a Deceased/Divorced ownership.

### Centralised Login Overview

- Exciting changes are on the way, we will be progressively rolling out changes to how you log in to StrataMax, making it more secure. View more information on [Centralised Logins](#) for details on the action to take to verify user accounts prior to upgrade.

**IMPORTANT NOTE:** When StrataMax is installed on a new PC, new users will need to have an account created in **Security Setup**. We also recommend user accounts are created for all active users as soon as possible to prevent delay in receiving future version updates.

## Receipting Configuration - QLD Legislation

- A new per building configuration is now available for 'Queensland Outstanding Interest Allocation Rule' so that Interest is allocated to first if set.

## Building Information - Account Groups - ABN/TFN/GST & Number of Lots/Entitlements

- Building Information has the addition of ABN, TFN, GST Registered and Number of Lots/Entitlements fields now available for display in Account Group buildings.

## StrataMax v5.6.83 © Released Thursday 28th June

### Merge Letter Enhancements

- Copy and Edit functions, including the comments and description areas are available. This also includes temporary letter enhancements that need not be stored permanently set for overnight removal via a data sync task.

### New Search Field Enhancements

- A new Management Office and Account Manager field have been added to the **Search Bank Account, Search Work Order, Search Quotes** and **Search Creditor Invoice Items** searches (Account Manager not included here).

### Roll Distribution - Bing and Printer Properties

- BING printer and printing properties can now be set in the Report Distribution window.

### Roll Submissions and the Log

- Enhancements have been made to the Roll Log (ROLLED.LOG) to report changes submitted from a Portal Submission.

### Changes to StrataPay Deposit Slips

- From 1 July 2023, the StrataPay Deposit slip will include a template update to remove the cash option from Australia Post.

## StrataMax v5.6.82 © Released Thursday 15th June

### New Search Functionality

- New icons and screen have been added for new searches in StrataMax; **Search Building Info History, Search Work Orders, and Search Quotes**.

## New Features | Merge Letters and Report Distribution

- A major enhancement for **Report Distribution** and **Merge Letters** is in this release.

## Roll List Report Consolidation

- The *Roll List 1* and *Roll List 2* icons and screens have been consolidated into one **Roll List Report** screen.

## Contact Card Additional Email Preference Options

- Email addresses can now be configured in the **Roll** for specific use throughout the system. For example, an email address can be specified for use in the **Invoice Hub** only.

## Use BING for Email

- The ability to use BING to distribute emails has been added to Report Distribution with this release. Emails will be sent to BING using configured email addresses and preferences and will be sent via the BING API if configured to use the API.

## New Security Permissions

- New permissions have been added to the Security Setup screen; 'Delete Merge Letter' and 'Edit Email Templates'.

## New Reports Table

- A variety of report tables have been added to multiple areas of StrataMax.

## Meeting Hub | New Merge Field

- A new feature has been added to VoteMax to flag a Committee Election Nominee as 'Nominated from the floor,' and a new merge field has been created to accommodate this new functionality called 'IsNominatedFromFloor'.

## StrataMax v5.6.81 Released Thursday 1st June

## Search Screen Enhancements | New Current Building Restriction

- A new filter restriction - 'Current Building' field has been added to available search fields.

## Building Information | Additional count of Lots

- New fields have been added to Building Info to report the Total Number of Lots (Standard + Car Space + Storage Space) as well as the Number of Active Lots (Standard) which can be export to Excel.

## Creditor Invoice Search

- A new **Search Creditor Invoices Items** icon and menu is now available to users to search creditor invoice items that have been created based on set values; results can be exported to Excel.

## Account Manager Edit | Deleting an Active Account Manager

- When deleting an account manager that is active in a building, a prompt confirmation message will now appear and indicate whether the account manager is being used by any active buildings.

# StrataMax v5.6.80 Released Thursday 18th May

## Search Screen Enhancements

- General purpose search screens have been enhanced to offer the ability to create 'Saved Searches' based on the set search criteria. Searches can be created and saved in areas such as **Search Bank Accounts**, **Communications Search Logs**, and the **Log Viewer**. Note that there is a permission in **Security Setup**, associated with this functionality, called 'Save Group and Saved Searches'.

## Funds Management Report

- The **Funds Management Report** title on the top of each page has been updated in line with legislation.

## Bank Account Setup

- Enhancements have been added to **Bank Account Setup**, adding three extra account level fields to manage term deposit account functions.

## Dashboard | Maturing Investment Accounts

- The two new fields in **Bank Account Setup** have also been added to the 'Maturing Investment Accounts' item in the **Dashboard**.

# StrataMax v5.6.79 Released Thursday 4th May

## Building Information | New Options

**Building Information** screen now includes the ability to select, preview and delete a CMS document.

## Unpresented Payments and Receipts Report

Unpresented payments and receipts are now managed separately, to assist with improving the processing speed of daily banking. With this change a new menu **Unpres. Payments and Receipts** has been introduced as well as a **Security** option and a newly titled report for inclusion in **Report Set**. There are also a new columns for the Account Code and Account Name added to the **Dashboard** items No.Days Oldest Receipt Remains Unpresented and No.Days Oldest Payments Remains Unpresented.

## What's Better

An additional 3 enhancements have been included in this update. Please open the release notes and see the last page for details on each.

**Building Transfers** - Version 5.6.79 is not backwards compatible and Building Transfers from 5.6.79 to pre-79 clients will not be available.

## StrataMax v5.6.78 Released Thursday 20th April

### **EFT Manager | New Validation**

If a payment is excluded or reversed outside of **EFT Manager** and **EFT Manager** has a batch loaded, the exclude and reverse options are available and can still be used. Enhancements have now been made to validate when the exclude or reverse options are selected and the batch has a payment that has been reversed or excluded while having the **EFT Manager** window active, the user will be advised that the batch needs to be reloaded.

### **Building Information | Meeting Details**

Changes have been made to the Meeting Details output to spreadsheet, the output will now include meeting dates, times, and meeting details.

### **Bank Account Setup | Enhancements**

Changes have been made in **Bank Account Setup** to make the 'Remove' button more obvious and add a tool tip to assist users.

### **Process Bank Statements | New Remove Option**

A new option has been added to the **Process Bank Statements** screen to remove closed bank accounts where reconciliations have been completed.

### **What's Better**

An additional 6 enhancements have been included in this update. Please open the release notes and see the last page for details on each.

## StrataMax v5.6.77 Released Thursday 6th April

### **NSW Strata Hub | AGM Meeting Dashboard Report**

A new **Dashboard** tile has been created to show buildings where reporting has exceeded the configured threshold since the building's last AGM date.

### **All Bank Accounts | New Columns**

New columns have been added to the '**All Bank Accounts**' screen, which will allow users to export more information.

### **All Bank Accounts | New Security permission**

A new permission has been added to **Security Setup**, called 'Search Bank Accounts' that controls access to the '**All Bank Accounts**' screen.

### **New icon | Search Bank Accounts**

A new icon and menu item has been added called 'Search Bank Accounts'. This will display the same the '**All Bank Accounts**' screen in **Bank Account Setup**.

## Bank Reconciliation | Automate Create Bank Transfers

A new option has been added when creating a *legend* in **Bank Reconciliation**, that would help identify potential transfer between accounts and process them automatically.

### What's Better

An additional 7 enhancements have been included in this update. Please open the release notes and see the last page for details on each.

## StrataMax v5.6.76 Released 23rd March 2023

### Bank Account Setup | Account Type selections

Enhancements have been made to **Bank Account Setup** to include on-screen notes for the account type selections as well as a new 'Status' column. An 'Other Investment Account' radio button has also been added to replace the old 'Manual' tick box for when statement files are not available and manual reconciliation is required.

### Bank Reconciliation | New Configuration setting

A configuration setting has been added to the **Bank Reconciliation** configuration called 'Bank to Bank Transfer Date Tolerance'. This will assist with managing bank transfers sent the next business day.

### What's Better

An additional 5 enhancements have been included in this update. Please open the release notes and see the last page for details on each.

## StrataMax v5.6.75 Released 9th March 2023

### Automatic Month End Rollovers

Enhancements have been made to **Automatic Month End Rollovers** to check investment and operating accounts.

### Process Bank Statements

Buildings that have the *Manual Entry* box ticked in **Bank Account Setup** will now be identified in the **Process Bank Statements** screen.

### What's Better

An additional 9 enhancements have been included in this update. Please open the release notes and see the last page for details on each.

## StrataMax v5.6.74 Released 23rd February 2023

### Building Information | Office Bearer Mobile/Contact Details

**Building Information** screen now includes an extra column for the mobile number for committee members.

### Roll/Plan Report

The *Roll Plan Report* has been reinstated and is now available in the **Roll** screen, in the **Reports** menu.

## Security Setup | Creditor Invoices

A new security permission called 'Creditor Invoices-Edit Description' has been added. This controls a user's access to change the description of any creditor invoices in the **Payments Management** screen.

## Process Bank Statements | New Configuration

New configuration option called 'Default Account Type Filter' has been added to the 'Configuration' screen in **Process Bank Statements**.

## Bank Account Setup | Import unregistered bank accounts

A new import option has been added to the **Bank Account Setup** screen for any bank accounts for banks other than SCM (SCM already supported). The new options will appear for all banks that don't have a bank account already set up. StrataMax detects this in the downloaded banking file.

## What's Better

An additional 12 enhancements have been included in this update. Please open the release notes and see the last page for details on each.

## StrataMax v5.6.73 Released 9th February 2023

### NSW Strata Hub - Report Externally

We have added a new field in **Building Information** for NSW Buildings called 'Report to Strata Hub manually'. When set to 'Yes' the building will not appear in the NSW Strata Hub for upload.

### Creditor Aged Balance Report

**Creditors Aged Balances Report** now has the additional selection of 'Creditor Code Order' and 'Creditor Description Order' available to sort the report by Creditor Code or Description.

### Roll Submissions

With the recent enhancements to the **Roll Submissions**, released on Portal (31st January 2023) will now by default be displayed. Any historical unprocessed submissions, can be viewed from \BCM\Archive\UnprocessRollsSubmissions.xlsx.

### Bank Account Setup and Investment Banking

StrataMax now has the ability to manage both operating and *investment accounts* at the same time in BCMax and GLMax. This enhancement will streamline the download and reconciliation of investment banking, resulting in improved balance verification, faster processing times, easier interfaces and new reporting.

### Process Bank Statements

The **Process Bank Statements** screen is designed to give the users a central point to view and action daily banking for all buildings, all banks and now *investment accounts*.

### Global Bank Reconciliation Summary Report

The global report **Bank Rec. Summary Report** has been enhanced to support investment accounts to report bank reconciliation information.

### Security - Process Bank Statements/Bank Reconciliation

New **Security Setup** permissions have been added to allow users access to the new menus 'Process Bank Statements' and 'Bank Rec. Summary Report'.

## Dashboard - Maturing Investment Accounts

A new **Dashboard** item called 'Maturing Investment Accounts' has been added providing the ability to monitor investment accounts maturity.

## Transferring money between Operating and Investment Accounts

In the **Bank Reconciliation** screen a new *Create Bank Transfer* button is available to transfer funds between the operating and investment account. The system will automatically reconcile between the funds for transactions processed through the bank as 'Other or Interest'.

## What's Better

An additional 6 enhancements have been included in this update. Please open the release notes and see page 27 for details on each.

## Release Notes Roll Submissions Released 31st January 2023

Online **Roll Submissions** have been redeveloped to accommodate the changes made to the Roll in 2022. The update of roll submissions will be released in two stages; stage 1 released on 31st January 2023 is activated for all clients on v5.6.64 or higher. This stage is prioritised to allow roll submissions to be accepted for a lot that includes multiple contacts. Please note in version 5.6.71 two additional configuration settings were added; [click here](#) to view details.

## StrataMax v5.6.72 Released 25th January 2023

## What's Better

An additional 5 enhancements have been included in this update. Please open the release notes and see page 3 for details on each.

## StrataMax v5.6.71 Released 11th January 2023

**Creditors Aged Balances Report** (formerly Creditors Balances) has been updated; **Creditors List** has been removed, as was reporting similar information. Global reports have also been updated.

## What's Better

An additional 12 enhancements have been included in this update. Please open the release notes and see page 3 for details on each.

## StrataMax v5.6.70 Released 5th January 2023

### Process Bank Statements - Heritage Bank

Heritage banking files are now supported for both BCMax and GLMax, once banking files are downloaded **Process Bank Statements** can be used to assist with importing and reconciliation.

## What's Better

An additional 4 enhancements have been included in this update. Please open the release notes and see page 4 for details on each.

## **StrataMax v5.6.69 Released 21st December 2022**

### **NSW Strata Hub Enhancements**

We have added a new value, 'Not Set', to the *NCC Building Class* field in [\*\*Building Information\*\*](#), as well as a 'Copy Value to other buildings' button.

### **What's Better**

An additional 4 enhancements have been included in this update. Please open the release notes and see page 4 for details on each.

## **StrataMax v5.6.68 Released 15th December 2022**

### **Opening Balance Setup | Cash at Bank Unpresented Receipt**

Enhancements have been made to [\*\*Opening Balance Setup\*\*](#) to create an unpresented receipt to the '012 Cash at Bank' account code in [\*\*Bank Reconciliation\*\*](#) when entering the opening balances for a new building. The initial deposit will present to this when processed into the bank.

### **Process Bank Statements | Drag and Drop Statement Files**

Drag and drop functionality has been introduced for statement files copied to [\*\*Process Bank Statements\*\*](#).

### **Bank Reconciliation | User Id**

A new message has been added to the Bank Reconciliation noting when an item is created manually.

### **Delete Statement Files**

Banking statement files can now be deleted after import if required. This option is to not store the banking files once they have been imported, removing sensitive data from the file system. Further details can be located in our [\*\*Data Maintenance\*\*](#) article.

### **Receipt Allocation | Overdue Interest**

As per state legislation, overdue interest will now be posted before anything else if the 'Overdue Interest' levy invoice code is the lowest priority in [\*\*Levy Invoice Code Setup\*\*](#).

### **Bank Reconciliation | Configuration**

Two new tick boxes have been added to the [\*\*Bank Reconciliation Configuration\*\*](#) screen so that payments will auto-process from owners who are in [\*\*Legal Action\*\*](#), and/or owners who have a payment plan set up.

### **What's Better**

An additional 7 enhancements have been included in this update. Please open the release notes and see page 7 for details on each.

## **StrataMax v5.6.67 Released 1st December 2022**

## **Move Fund Balances**

A new icon and screen titled **Move Fund Balances** is now available to allow correction of fund balances for an account.

## **Strata Hub | NSW Integration**

StrataMax has worked with the NSW Government to enable a bulk upload of the required data to the Strata Hub Portal based on NSW Government validation requirements, and introduced a new icon and screen called **NSW Strata Hub**.

## **What's Better**

An additional 9 enhancements have been included in this update. Please open the release notes and see page 6 for details on each.

## **StrataMax v5.6.66 Released 17th November 2022**

### **Meeting Hub | Distribution Enhancement**

The *Document Distribution screen* has been enhanced to have the ability to further select the 'Mailout' options for document delivery.

### **Contact Management | Agent & Correspondence Settings**

Enhancements have been made to **Contact Management** to automatically update the roll when an agent is withdrawn.

## **Totals Per Invoice**

Enhancements have been made to 4 different screens to display a total per invoice, not just per payment.

## **What's Better**

An additional 14 enhancements have been included in this update. Please open the release notes and see page 7 for details on each.

## **StrataMax v5.6.65 Released 1st November 2022**

### **Stored Reports in DocMax | Merge Letters & Sub-Group**

The second stage of this enhancement has been made to store all stored reports into DocMax, and now includes .DOC **Merge Letters** and **Sub-Group (Utility Billing)** invoices and reports, which will allow users to view these documents in *Work Queues* and upload them to the *StrataMax Portal* where applicable (lot specific documents such as **Levy Notices** should not be uploaded to the portal). Please note this does not include GLMax documents.

### **Receipting | Allocation by Due Date**

Enhancements have been made to the UI in Receipt Entry, Bank Reconciliation > Receipt, and Debtor Adjustments. It will now allow users to see the due date of each transaction including invoices not associated with a levy fund.

## **What's Better**

An additional 9 enhancements have been included in this update. Please open the release notes and see

page 5 for details on each.

## StrataMax v5.6.64 Released 20th October 2022

### Building Information Redesign

**Building Information** has redesigned from the ground up and replaces the **Info Update**, **Building Info** and **Building Information** menus into one screen. This redesign will provide users with an easier interface and introduces a number of new features to allow customisation based on user & company requirements.

### DocMax | Searchable Building Type and Regulatory Module Fields

New fields have been added to DocMax which will filter the documents returned by 'Building Type' and 'Regulatory Module'. These fields can also be included in [Saved Searches](#) and [Work Queues](#).

### New WA Building Type Options

We have added two new building type options for Western Australian buildings selectable in **Building Information** and **New Building (BCMax)** screens.

### Notes | All Areas

Note modules have been enhanced and now have a refreshed user interface. The new screen has been implemented in any location that notes can be added in BCMax and GLMax.

### What's Better

An additional 5 enhancements have been included in this update. Please open the release notes and see page 19 for details on each enhancement.

## StrataMax v5.6.63 Released 6th October 2022

### Meeting Hub | Update Minutes for Adjourned Meetings

When a meeting is adjourned and then reconvened, a manager should be able to send a consolidated version of the minutes which includes details of both the adjourned and the reconvened meeting to owners. If a meeting is adjourned multiple times, the details of all meetings should be included.

Enhancements have been made to document generation that is now capable of receiving a collection of meetings and their associated template groups, instead of just one at a time. The document generation will now join the merged documents for each of the meetings in the collection order that they are received from the website.

### What's Better

An additional 7 enhancements have been included in this update. Please open the release notes and see page 6 for details on each enhancement.

## StrataMax v5.6.62 Released 21st September 2022

### DocMax | Subgroup Selection

The ability to select Sub Group buildings is now available in DocMax. Documents can be added to Sub Groups buildings for Utilities, Marina buildings, By Law Sub Groups and Air Conditioning Sub Groups.

## Meeting Hub | Change distribution method

The Document Distribution page has been enhanced to allow the user to change the distribution method for the Recipients on the Recipients grid.

## Meeting Hub | Keyboard shortcuts

Standard tag column behaviours have been added to the Meeting Hub Document Distribution page.

### What's Better

An additional 6 enhancements have been included in this update. Please open the release notes and see page 6 for details on each enhancement.

## StrataMax v5.6.61 Released 8<sup>th</sup> September 2022

### Roll | Office Bearer Identification

Committee Members will now be identified in the *Owner Details* screen if they have been added to **Office Bearers** from the **Roll**. 'Committee Member' will be displayed regardless of the position held.

### StrataCash Hub

**StrataCash Hub** has now been enabled for all clients with this update and is a direct replacement of the old StrataCash menu. This new hub will streamline access and requests to the StrataCash team. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

### What's Better

An additional 9 enhancements have been included in this update. Please open the release notes and see page 4 for details on each enhancement.

## StrataMax v5.6.60 Released 25<sup>th</sup> August 2022

### Contact Management | Merge Contacts

In the **Contact Management** screen, a confirmation prompt has been added and will appear when merging contacts to allow review of the changes prior to proceeding.

### New Building Setup | Add New Lots

When *creating a new building with new lots*, the date of the roll set up will default to the date of registration for the building. Original Owners will be added as of that date if not modified at the time new lots are created. This will allow the date of acquisition to be backdated if required.

### What's Better

An additional 8 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

## StrataMax v5.6.59 Released 11<sup>th</sup> August 2022

### DocMax Merge Fields

We have created the ability to use Merge Fields for DocMax Title, Description & Notes fields and allow these to be applied on profiles and action buttons of work queues.

## **Edit Invoice Transaction Details | Debtor Transactions**

Transaction descriptions can now be edited for debtor transaction with references that start with 'M0' (Please note that this does not include transactions with reference 'MA').

## **South Australia | Presiding Officer, Secretary and Treasurer**

Enhancements have been made to BCMax to update the office held for presiding officer to be classified as a chairperson. This change will allow committee elections for presiding officer, secretary, treasurer and ordinary members in meeting hub for South Australia in the upcoming Online voting release.

### **What's Better**

An additional 9 enhancements have been included in this update. Please open the release notes and see page 4 for details on each enhancement.

## **StrataPay Online DDR Released 8<sup>th</sup> August 2022**

### **Online form for Direct Debit Requests**

With StrataPay's online direct debits, owners can easily setup an automatic payment for their levy balance to come directly from their bank account or credit card. Alternatively, they can set a scheduled fixed amount to be drawn at a time and frequency that suits them. Refer to [www.stratapay.com/levyddr](http://www.stratapay.com/levyddr) or the release notes for more information.

### **Setup a new Direct Debit Request online**

Owner's can simply go to our [Direct Debit](#) page where they can submit an online form that allows them to pay via their Credit card, Debit card or Australian Bank Account. They will need their StrataPay reference number to access the online form.

### **Amend or Cancel an existing Direct Debit Request online**

Direct Debits can be amended or cancelled via our [Direct Debit](#) page.

## **StrataMax v5.6.58 Released 28th July 2022**

### **Data Health Dashboard - Lost Building Documents**

Further breakdown of documents by Lost/not-lost building status has been provided as an option in the [Data Health](#) configuration screen.

### **What's Better**

An additional 9 enhancements have been included in this update. Please open the release notes and see page 4 for details on each enhancement.

## **StrataMax v5.6.57 Released 14th July 2022**

### **Bank Account Setup | Add Address**

The following new options have been added to [Bank Account Setup](#) to select if the address for the bank account will:

- Use building address as account owner.

- Use manager address as account owner.

### Search Transactions (Edit Transaction Description/Details)

The **Quick Transaction List** screen has been replaced with a new screen called **Search Transactions**, this will allow users to search transactions and edit descriptions for specific transaction types.

### Bank Reconciliation | Unmatch Allocation

A new option, 'Unmatch this allocation' has been added to the **Bank Reconciliation** screen. This new option will allow users to Unmatch EFT's, cheques and receipts that were manually matched.

### New Building Setup | Creating new lots in the Roll

The 'Add Lots Start' screen will now be presented when creating new lots in the building setup process. This is so the plan date can be set to the appropriate Lot Effective date (Date of Building Registration for example) at the time the building is created.

### What's Better

An additional 6 enhancements have been included in this update. Please open the release notes and see page 9 for details on each enhancement.

## StrataMax v5.6.56 Released 30th June 2022

### Process Bank Statements | St George

Enhancements have been made to import St George (STG) banking once banking files are downloaded daily using **Process Bank Statements**.

### What's Better

An additional 10 enhancements have been included in this update. Please open the release notes and see page 4 for details on each enhancement.

## StrataMax v5.6.55 Released 16th June 2022

### Roll Replacement

The **Roll** interface has been extensively enhanced to provide a clearer overview of lot details while maintaining current functionality. The options have changed as most tools and options have now been incorporated into the Roll screen. Essential options have been retained as menu items as well.

### Contact Management

**Contact Management** has been designed to manage any contacts added to building records. At present it will manage existing contacts or newly created contacts for an owner, tenant, agent, office bearer, nominee or other representative contact.

### Desktop Search

The **desktop search** bar has been enhanced and can now be used to search for contacts and lots based on

- Contact Name
- Contact Email Address
- 9-digit StrataPay number

- Lot Address Field

### **Roll Submissions | Icon and Dashboard Item**

A tile to show unprocessed **Roll Submissions** is now available to add to the desktop **Dashboard**, and the **Roll Submissions** screen now has its own icon.

### **Transfer Agent Portfolio**

The **Transfer Agent Portfolio** has been created to assist with the migration of records when some or all of a Real Estate Agents portfolio is moving to a new Real Estate Agent.

### **Insurance Policy Expiry Notification**

The Insurance Policy Notification message will now be displayed beside the building selector. The notification will be based on the expiry date set for Insurance Code 901.

### **Office Bearers Report | Custom Sort Order**

**Office Bearer Reports** can now be customised to display Office Bearers in any order.

### **Data Health Check | New Dashboard Item and Report**

A new report item has been added to the Administrator **Dashboard** called **Data Health** to facilitate review and configuration of building data file retention.

### **Process Bank Statements | Bendigo**

Enhancements have been made to import Bendigo (BBL) banking once banking files are downloaded daily using **Process Bank Statements**.

### **What's Better**

An additional 4 enhancements have been included in this update. Please open the release notes and see page 29 for details on each enhancement

## **StrataMax v5.6.54 Released 2nd June 2022**

### **BAS Configurations**

Enhancements have been made to two settings in the *configuration menu* of the **Business Activity Statement** screen.

### **Receipt Entry | Zero Receipts**

**Receipt Entry** has been enhanced to no longer allow \$0.00 amounts to be saved for receipts.

### **What's Better**

An additional 3 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement

## **StrataMax v5.6.53 Released 19th May 2022**

### **Process Bank Statements - ANZ**

Enhancements have been made to import ANZ banking once banking files are downloaded daily, using the **Process Bank Statements** screen.

## Merge Letters - LoginIDCheck field

We have exposed the "LoginIDCheck" field in [Merge Letters](#) to provide an option to produce [Welcome Letters](#) with 9-digit StrataPay Reference numbers.

### What's Better

An additional 4 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

## **StrataMax v5.6.52 Released 5th May 2022**

### Process Bank Statements - Import NAB and CBA

Enhancements have been made to import NAB and CBA banking once banking files are downloaded daily, using the [Process Bank Statements](#) screen.

### Levy Arrears - Option to list levy arrears in Due Date order

An option to show overdue levy arrears in due date order on arrears notices is now available in the [Arrears Notice configuration](#). When set, levy arrears will be ordered by due date rather than by Invoice code.

### Meeting Hub - New merge fields for Document Generation

Two new merge fields have been added to the Committee Election [template groups](#) in [Meeting Hub](#).

### What's Better

An additional 7 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

## **StrataMax v5.6.50 Released 21st April 2022**

### Banking & Bank Reconciliation

This release includes a complete overhaul of the [Bank Reconciliation](#) screen. There are also two completely new screens; the [Bank Reconciliation Report](#) and [Process Bank Statements](#), which has been designed from the ground up to streamline the download and reconciliation of daily banking.

### What's Better

An additional 9 enhancements have been included in this update. Please open the release notes and see page 19 for details on each enhancement.

## **StrataMax v5.6.48 Released 7th April 2022**

### Meeting Hub Enhancements

Collections of new merge fields have been added to the [Meeting Hub](#) and merge fields can now be filtered by search text.

NOTE: [Template Groups](#) for minutes will need to be amended.

### What's Better

An additional 5 enhancements have been included in this update. Please open the release notes and see

page 4 for details on each enhancement.

## StrataMax v5.6.47 Released 21st March 2022

### GLMax Debtor Adjustment

**Debtor Adjustment** has been added to GLMax to allow users to easily reallocate funds for a debtor and funds between debtors.

### Invoice Hub | Creditor override for single layer approvals

Enhancements have been made in the **Invoice Hub** to allow a **Creditor Override** for a single layer approval.

### NSW StrataMax Hub Report

On the 30th June 2022, NSW legislation commences where managers will be required to input data into the Strata Hub (an online government platform). Schemes will be required to lodge an annual return within 3 months of the AGM. A link to the regulations is below. To assist with the collection of data required; a global report is now available that reports information from **Info Update, Insurance, Office Bearers, Inspections** and Account Balances. This report is called 'NSW Strata Hub Report.'

### What's Better

An additional 4 enhancements have been included in this update. Please open the release notes and see page 15 for details on each enhancement.

## StrataMax v5.6.46 Released 10th March 2022

### What's Better

An additional 9 enhancements have been included in this update. Please open the release notes and see page 3 for details on each enhancement.

## StrataMax v5.6.45 Released 24th February 2022

### DocMax - Account Group Field (Victoria Multi OC)

A new DocMax property has been added to accommodate **documents added to DocMax** for an account group building where the document is specific to a particular Account Group.

### Levy and Arrears Notices | BCC Account Manager

Emailed Levy and Arrears Notices can now be configured to BCC the building Account Manager that has been set in **Info Update**.

### Month End Rollover | Skip GLMax BAS Check

**Month End Rollover** in GLMax can now be configured to skip the check if the latest BAS has been saved for GLMax companies where the BAS is not required.

### Part 1 | Stored Reports storing in DocMax

Enhancements have been made to store all **Stored Reports** in DocMax, which will allow users to view these documents using the various functions of DocMax (when the Roll changes are released, a shortcut from the lot to that lots documents will also be available). This change will also aim to reduce the BCMax database size for backups. Existing **Stored Reports** will not be initially moved to DocMax on upgrade - this will occur separately via the scheduler over time; as this occurs documents that may seem old will

appear in *Recently Added*. All reports will still be viewable in [Stored Reports](#).

#### **What's Better**

An additional 3 enhancements have been included in this update. Please open the release notes and see page 7 for details on each enhancement.

### **StrataMax v5.6.43** Released 10th February 2022

#### **Master Chart Filter | Delete Accounts**

Account codes can now be deleted from the Base Building using the Master Chart Filter, and Header accounts are now available for selection when deleting codes in the Base or any tagged building/s.

#### **DocMax Work Queues | Slow Performance Indicator**

We have added a 'Slow Performance Indicator' icon and 'Slow' note for [Work Queues](#) where performance may be impacted by the volume of data or configuration issues.

#### **StrataCash Hub**

[StrataCash Hub](#) is a direct replacement of the old StrataCash menu. This new hub will streamline access and requests to the StrataCash team. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

Please note that this will be activated on a client by client basis. The list of actions available on the hub may differ from the list shown.

#### **What's Better**

An additional 8 enhancements have been included in this update. Please open the release notes and see page 7 for details on each enhancement.

### **StrataMax v5.6.42** Released 27th January 2022

#### **Process Recoveries | Preview Summaries**

A variety of different summary previews are now available when previewing unprocessed recoveries.

#### **BCMax Email Server | notification for failed email**

Notifications will now be sent to the sender of failed emails.

#### **Office Bearers Report | Lot Fields**

The [Office Bearers](#) screen has been enhanced to display the lot number and unit number for 'Owner of Lot' and 'Nominated By' columns.

#### **What's Better**

An additional 4 enhancements have been included in this update. Please open the release notes and see page 11 for details on each enhancement.

### **StrataMax v5.6.40** Released 13th January 2022

#### **Report Set | Include Extra Financial Reports**

We have added the ability to include Extra Financial Reports in [Report Sets](#).

### **Management Fees Setup | Increase by Fixed Amount**

A new option to increase periodic values by a fixed amount has been added to [Management Fee Increase](#) options.

### **DEFT Slip Changes**

As required by Macquarie Bank, DEFT slips have had Australia Post wording updated to remove the cash payment option. Bar codes have also been altered to remove the additional \$2.75 adding to the total amount.

### **Financials Statements | Lot Budget Summary Report**

The Lot Budget Summary Report has been added to Custom Report Templates where a custom template can be selected for the report.

### **Office Bearer Report | Account Manager**

The [Office Bearers Report](#) will now include the Account Manager contact details name, phone number and email address if available.

### **What's Better**

An additional 6 enhancements have been included in this update. Please open the release notes and see page 9 for details on each enhancement.

## **StrataMax v5.6.39** Released 16th December 2021

### **Contact Card | Security Permissions**

There are new security permissions for editing contact name, contact details and preferences.

### **Communications | Multiple windows**

The Communications module will now allow users to utilise other modules and menu options when in the *Compose Email* screen.

### **What's Better**

An additional 9 enhancements have been included in this update. Please open the release notes and see page 6 for details on each enhancement.

## **StrataMax v5.6.38** Released 2nd December 2021

### **Office Bearer Report - 'Send Status Reports' field**

The 'Send Status Reports' field on [Office Bearer Reports](#) will also observe the 'Officer Types' selected in [Status Report > Options > Set Officer Types](#).

### **What's Better**

An additional 7 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

## **StrataMax v5.6.37** Released 18th November 2021

## NSW Legislative Changes

The Community Land Management Act 1989 will be replaced by 'Community Land Management Act 2021' on 1st December, 2021. On that date, all references to the old act need to be replaced by references to the new act. <https://legislation.nsw.gov.au/view/pdf/asmade/act-2021-7>

## Victorian Legislation | Building Tiers

From 1st December new legislation comes into effect where buildings will be classed under specific tiers based on the *Active Lot* count, found in **Info Update**. This excludes lots marked as a 'Car Park' or 'Storage'.

## Office Bearer | Enhancements

We have added multiple enhancements to the **Office Bearers** screen. Please see page 5 - 9 for details.

### What's Better

An additional 4 enhancements have been included in this update. Please open the release notes and see page 10 for details on each enhancement.

## StrataMax v5.6.36 Released 4th November 2021

### Office Bearers | Contacts

Enhancements have been made to the user interface when creating a new contact. Please refer to the **Office Bearers** article for more information.

### What's Better

An additional 11 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

## StrataMax v5.6.35 Released 19th October 2021

### StrataMax Desktop | ResVu

We've added link to our new integration partner ResVu, who provide owners and tenants with the opportunity to action all of their day-to-day needs directly from a custom-branded mobile app.

### Add Office Bearer | Copy from Roll

The 'Select from Roll' button has been changed to 'Copy from Roll', which allows the contact to be modified and saved as a separate contact to the **Roll**.

### What's Better

An additional enhancement has been included in this update. Please open the release notes and see page 5 for details.

## StrataMax v5.6.34

### Invoice Hub | Credit Notes

The **Invoice Hub** can now be configured to upload *credit note invoices* for approval.

## What's Better

An additional 4 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

### [StrataMax v5.6.33](#) Released 7th October 2021

#### **Account Dissection Report | Account Groups (Multi OC Buildings)**

New options have been added to the Account Dissection report that allows selection of one or all account groups to be reported separately.

#### **Processing Standing Journals after Auto-Rollover Month End**

Pending transactions may occur when the date of the transactions is in future of the current posting month, but becomes current once the completion of the rollover has occurred. The Auto-Month End function will now process any pending Management Fee and Recoveries transactions, automatically after it completes the rollover.

#### **Financial Reports | Old Presentation Financials**

Old style Presentation Reports have been replaced with Presentation Style 2 Reports and will soon be removed. If an old-style report is selected, a message will be displayed advising that the selected report will be retired in future versions.

#### **Meeting Hub | Email Template**

Meeting Hub Email templates have been enhanced to provide meeting details in the email.

## What's Better

An additional 6 enhancements have been included in this update. Please open the release notes and see page 8 for details on each enhancement.

### [StrataMax v5.6.32](#) Released 23rd September 2021

#### **Printer setup for Bing API**

Enhancements have been made to allow either API or Mailroom to be selected in the *Printer Setup* screen throughout StrataMax. A new option called 'StrataMax Bing Easy Post API' in the *Printer* can be selected if the [Bing Web API](#) has been configured.

#### **Office Bearers | Contact Management**

Office Bearers has been redesigned with a new enhanced user interface, and integrates with the new *Contact Management* system.

#### **Manager Maintenance | Contact Management**

Manager Maintenance has been redesigned with a new enhanced user interface, and integrates with the new *Contact Management* system.

## What's Better

An additional 11 enhancements have been included in this update. Please open the release notes and see page 17 for details on each enhancement.

### BingMail API | Printing to EasyPost Mailroom

The BingMail Web API can now be used from any area when printing notices or documents in bulk, rather than using the EasyPost Mailroom software. This will group and send documents or reports printed for each building and quickly upload them to the BingMail portal for review. See [Bing EasyPost & BingMail](#) for more info.

### Security Setup | Replicating User Settings

Through the [Security Setup](#) menu, we have added the ability to copy user settings from one StrataMax user to another. The option 'User Settings' will allow the management of user settings when taking on new staff or to ensure existing staff have the same configuration set up across departments, with exception of the [Communication](#) menu.

### Payment Entry | Manual Cheque Book references

A *Cheque Book* reference option has been added to the [Payment Entry](#) menu. This new enhancement will allow users to record a manual cheque book number against a payment.

### What's Better

An additional 10 enhancements have been included in this update. Please open the release notes and see page 10 for details on each enhancement.

Tag option in Tag Paid Invoices will now require a StrataMax Support password as it is no longer required for day-to-day processes and prevents Bank Reconciliation and Payment Entry from working as designed if used incorrectly.

### Security Setup | User Profile & Manager Account

The *User Profile & Manager Accounts* screen has received a user interface update, and when a new user is set up, their email address and username will now be copied to the 'Sender' email address and 'Username' in the [Communication](#) menu in *Options > Communication Setup*.

### Financial Statements | Save Settings for Monthly Rollover

In the [Financial Statements](#) menu, a new item has been added in the *Options* menu called 'Save Settings for Month End Rollover', which is to set the default financial statement to be stored when [Month End Rollover](#) is completed.

### Journal Preparation | Account Balances Display

A new field has been added to the [Journal Preparation](#) menu, which displays the current total and new total of the account code for each line item in the journal set. The system will now calculate the impact of the transaction on the selected account code, based on the amount you have entered.

### Work Order Disbursements | TRMax Notes

When a job is issued in [TaskMax](#) and the charges have been set up in the [Disbursements](#) menu, a new record is created in the [TRMax](#) menu. Enhancements have been made to the [TRMax](#) menu, which will now display an new 'Notes' field when quotes are requested and received and jobs are issued.

## DocMax | Include Inactive Creditors

A new tick box has been added to DocMax when adding a new documents. Specifically under the 'Invoice Details' section, which allows users to include *Inactive Creditors* from the *Creditor* drop-down menu.

## What's Better

An additional 10 enhancements have been included in this update. Please open the release notes and see page 9 for details on each enhancement.

## StrataMax v5.6.29 Released 12th August 2021

### Marina Sub-Group | Levy Notices & Arrears Email Templates

Levy and Arrears notices in Marina Sub-groups will now utilise the local Levy or Arrears notice email template if one has been set up.

## What's Better

An additional 9 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

## StrataMax v5.6.28 Released 29th July 2021

### Payment Entry

A new **Payment Entry** menu has been added to provide a reliable platform to manage outgoing one-off payments, reimbursements and part payments. This menu is designed as a replacement for the existing 'Cheque Entry' process, allowing users to perform a number of different payment options (EFT, Cheque or BPAY).

### Creditor Invoice | Save and Pay

In addition to the new **Payment Entry** menu, users can now access the **Payment Entry** menu via the **Creditor Invoices** menu. This is used to pay a creditor immediately after the invoice is entered.

### Bank Reconciliation | Create Payment

In the **Bank Reconciliation** menu, in the *Statement Entry/Processing* tab, a new *Create Payment* button has been added. This new option will replace the need to process directs to creditor accounts.

### Edit Invoice List | Report to Excel

It is now possible to report and export information in the **Edit Invoice List** menu to Excel.

## What's Better

An additional 8 enhancements have been included in this update. Please open the release notes and see page 35 for details on each enhancement.

## StrataMax v5.6.27 Released 15th July 2021

### Compliance Monitor | New Setting

The **Compliance** menu now has a new configuration setting which provides the option to include or exclude inactive contractors.

### Management Fee Setup | Cloning Option

The [Management Fee Setup](#) menu now has a new 'Clone Fee' button.

### **Roll Master Editor Menu | Agent/Mortgagee Contact Management**

The Roll Master Editor menu has been updated with a new interface and functionality, and has been designed from the ground up to enhance the user experience when adding, searching for, viewing, and editing property agents and mortgagees in StrataMax. See the [Roll Master Editor 5.6](#) article for more information.

#### **What's Better**

An additional 9 enhancements have been included in this update. Please open the release notes and see page 11 for details on each enhancement.

## **StrataMax v5.6.26** Released 1st July 2021

### **Security - Reverse Presented Payments**

A new security setting 'Reverse Presented Payments' has been added to the [Security Setup](#) menu. This will control users and user groups from reversing presented payments via the [Payments Management](#) menu for BCMax and [GLMax](#).

### **Log Viewer - New Log Category - ArrNoticeClr**

A new category has been added to the [Log Viewer](#) called 'ArrNoticeClr', which will log a message when a receipt has been made to an account in arrears if the 'Clear Arrears Flag' setting has been enabled in the [Receipt Entry](#) menu in *File > Configuration*.

### **Restore Data | Support Only Function**

Please be advised that in order to assure the integrity of your data, and stability and functionality of StrataMax, we have restricted access to the [Restore Data](#) menu to only be available to the StrataMax Support team. This decision has been made since a complete restore of an individual building can impact a lot of areas such as the [Bank Reconciliation](#), [Invoice Hub](#), [DocMax](#), [Portal](#), and other areas, often causing further issues.

#### **What's Better**

An additional 8 enhancements have been included in this update. Please open the release notes and see page 6 for details on each enhancement.

## **StrataMax v5.6.25** Released 17th June 2021

### **EFT Manager**

EFT Manager has been enhanced to allow users to view payment details (including invoices and documents), and can now also allow users to re-open a finalised batch under certain circumstances.

### **Month & Year End Rollover | New Auto-Rollover**

A new option has been added to the [Month / Year End Rollover](#) menu configuration, which will automate the rollover process if enabled. Rollovers will be completed in the background via a schedule, which can be configured to skip or run based on the required criteria.

#### **What's Better**

An additional 16 enhancements have been included in this update. Please open the release notes and see page 13 for details on each enhancement.

### DocMax Building Prefill

The [DocMax Auto prefill building option](#) has been enhanced with more building type keywords. This will cater for a broader range of building types.

### Process Recoveries

The Process Recoveries module have been enhanced to include a new Invoice Code Filter which will allow individual codes to be selected for processing.

### EFT Manager & EFT Manager Report

Configurations have been added to the [EFT Manager](#) menu to allow users to set a default 'DE User ID and User Name' for all banks except SCM.

The EFT Manager Report has been enhanced to report two (2) new fields of data.

### Dashboard

The *Management Dashboard* has been enhanced to include a report titled 'Arrears Budget Percentage', and also now includes two new reports.

### What's Better

An additional 9 enhancements have been included in this update. Please open the release notes and see page 15 for details on each enhancement.

### Arrears Notices - Add a Ledger Card

Enhancements have been made to Arrears Notice Setup to allow for a Ledger Card to be added and output with an Arrears Notice/Letter.

### What's Better

An additional 11 enhancements have been included in this update. Please open the release notes and see page 7 for details on each enhancement.

### Communication Menu Enhancements

Enhancements have been made to the Communication menu to record the building number when emails have been sent via StrataMax, and provide the ability to search and filter by Building.

### TaskMax | Bulk Finalise

Enhancements have been made to reduce the time restriction from 2 years to 1 year in the 'Finalise Old Work Orders' menu option in [TaskMax](#).

### Management Fees Report

Improvements have been made to the [Management Fees Report](#). Several new criteria have been added to the setup for improved search speed and to prevent the search retrieving records for lost buildings.

### DocMax | Add Documents | Auto Prefill Building setting

A new DocMax setting, 'Auto Pre-fill Building' has been added, which, when configured, will attempt to match the document to a building in DocMax using keywords within the text of the document.

## StrataMax v5.6.21 Released 22nd April 2021

### Automatically Clear Arrears flag on receipt of funds

A new setting is now available in the [Receipt Entry](#) menu to ensure the arrears flags will be cleared automatically when an owner payment is receipted and the account balance owing is zero or below the pre-configured tolerance allowance.

### What's Better

An additional 7 enhancements have been included in this update. Please open the release notes and see page 5 for details on each enhancement.

## StrataMax v5.6.20 Released 8th April 2021

### Dashboard Filter – by Management Office

The ability to filter by Management Office has been added to [Dashboard](#) Reports.

### Lot Budget Summary – New Options

New configuration settings have been added to the [Financial Statements](#) menu to provide more output options for consolidated reports when running the *Lot Budget Summary* report.

### What's Better

An additional 9 enhancements have been included in this update. Please open the release notes and see page 7 for details on each enhancement.

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## StrataMax v5.5.113 Released 11th March 2021

### Certificates - CERT205 QLD

CERT205 Certificate for relevant QLD buildings has been changed to reflect the most current version of the regulatory act. The date will now show as '2020'.

### Meeting Hub

The [Document Distribution](#) screen now displays a more obvious message when a meeting notice or minutes have been sent. This message remains on screen until the Print/Email button is clicked again, or the [Document Distribution](#) screen is closed.

## StrataMax v5.5.110 Released 9th February 2021

### Office Bearer Maintenance – 'Nominated By Lot' Field

A new field called 'Nominated By Lot' has been added to the [Office Bearers](#) menu to record the details of the lot owner that nominated the committee member. The reason is to comply with changes made to Body Corporate and Community Management (Standard Module) Regulations 2020 (i.e. building types B.F.P, S.F.P and V.P), which take effect 1st March 2021.

StrataMax v5.5.109  Released 27th January 2021

### Office Bearer Maintenance – ‘Nominated By Lot’ Field

A new field called ‘Nominated By Lot’ has been added to the **Office Bearers** menu to record the details of the lot owner that nominated the committee member. The reason is to comply with changes made to Body Corporate and Community Management (Standard Module) Regulations 2020 (i.e. building types B.F.P, S.F.P and V.P), which take effect 1st March 2021.

StrataMax v5.5.107  Released 9th December 2020

### Resubdivision - Old Process

The old Resubdivision process has now been completely removed from StrataMax. Now when in the **Roll** menu, clicking the *Edit* or *New* buttons in the *Entitlements/Contribution* or *Interest* tabs, will automatically open the new **Resubdivision** menu.

StrataMax v5.5.106  Released 25th November 2020

### Financial Statements - Proposed Budget with Footnotes

Two new Proposed Budget Templates have been added to Financial Statements to provide the facility to add Footnotes to Proposed Budget reports.

### Roll Confirmation Template with Delivery Preferences

A new Roll Details Confirmation template called ‘Roll Details Confirmation - Mailroom Auto Populate’ has been added which will show the Levy Notice and Correspondence preferences as set in the **Roll** menu.

StrataMax v5.5.105  Released 11th November 2020

### Unpaid Creditor Invoice Report

The *Unpaid Creditor Invoice Report* has been enhanced with a new user interface and selection functions for users to apply more refined selections making report results more selective.

StrataMax v5.5.104  Released 28th October 2020

### Certificates

The Certificate for building type ‘UP’ - ACT Unit Titles Management has been updated, and the WA Certificate layout has been enhanced to incorporate levy data in the Certificate and is no longer included as an Annexure.

### Banking

Three new options have been added to the *Special Legend* in the Bank Rec screen.

StrataMax v5.5.100  Released 9th September 2020

### Meeting Hub

Email functionality has been enhanced to allow for the inclusion of a tailored subject and body in Emails sent from Meeting Hub/ Document Distribution.

New Security Permissions to be setup - 'Meeting Hub (Email Template Setup)'.

## [StrataMax v5.5.99](#) Released 26th August 2020

### **StrataMax**

A new **Resubdivision/Reallocation of Entitlements** module has been added to StrataMax to simplify the process of a Resubdivision and amending existing lot entitlements. This new process provides step-by-step setup screens for entry of data and reporting to confirm the validity of input prior to processing.

New Security Permissions to be setup - 'Roll (Resubdivision / Reallocation of entitlements)'.

## [StrataMax v5.5.96](#) Released 12th August 2020

### **Meeting Hub**

Additional settings to allow distribution of meeting notices & minutes to exclude lots with 0 entitlements and remove duplicates based on the recipients address.

## [StrataMax v5.5.95](#) Released 29th July 2020

### **StrataMax**

Discount transactions in various reports will now display the Discount Invoice Code Description to make it easier to identify the fund the discount applies to.

## [StrataMax v5.5.94](#) Released 15th July 2020

### **Meeting Hub**

Standard Meetings, Agenda Items and Motions have been enhanced to allow DocMax documents of the type 'Internal Document' to be attached. This would be useful for documents such as Proxy & Nominee forms etc.

## [StrataMax v5.5.93](#) Released 1st July 2020

### **StrataMax**

User Interface changes to Transaction Report Manager which is used to select certain transactions that you do not wish to display on reports.

## [StrataMax v5.5.92](#) Released 17th June 2020

### **StrataMax**

Generated levies are now able to be edited therefore in particular scenarios users will no longer need to reverse a levy.

New Security Permissions to be setup - 'Levies (Edit generated levies)'.