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.

StrataMax v5.6.150 □ Released 26th February 2026

DocMax | Search Enhancements

- New fields have been added to DocMax.

Certificates | Building Certificate Export

- Certificate Information column removed from Building Information export and available directly in the Certificate Info Editor area.

Label Printing | Decommissioning & Export Changes

- Label Printing is being phased out with feedback prompts; merge data export moved to Report Distribution with updated export options for Excel, merge files, email lists.

Restricted Issues | Report Distribution

- Restricted Issues Report now opens in Report Distribution with configuration for including revoked issues and full output options.

Ledger Card | Date Range Reporting

- Ledger Card now supports new date range fields within Report Distribution for generating period-specific reports.

Financial Statements | Edit Account Summary Setup

- Edit Account Summary Setup refreshed with improved account range controls for individual or all buildings.

Report Distribution | Account Summary Setup

- Account Summary Setup can now be accessed via Report Distribution when the Account Summary report is selected.

StrataMax v5.6.149 Released 12th February 2026

Levy Management | Levy Generation Schedule – Account Manager

- Enhancements have been made to the Account Manager configuration in the Levy Generation Schedule. Users can now search for Account Managers within the selection list.

Organisation Search | Office Bearers

- A new search option allows users with multi-drive access to locate Office Bearers across organisations. Access is controlled by the *Office Bearers Menu* permission on each drive.

Certificates | Certificate Cover Letter Text Expansion

- Local and Global cover letter text fields now support up to 4,000 characters.

Certificates | Menu Updates

- The Certificates (Disclosure Statement) menu is now titled **Certificates**. Disclosure Statements can no longer be produced from this menu.

Preview Features | Legacy Views Retired

Several older Preview Feature options have been removed and now default to Report Distribution. Users can now also view upcoming *Coming Soon* preview features.

- Certificates
- Report Set
- Receipts Report
- Subgroup Update Report

Roll | Edit Correspondence Preferences

- New functionality allows specifying whether correspondence and levy notices should be sent to owners, agents, mortgagees, others, or multiple selected recipients.

Statement / Ledger Card (Second Debtors) | New Style Templates

- Updated templates now support the new Report Distribution style for Ledger Card Second Debtor. Templates can be applied via the configuration cog when previewing the report.

Statement / Ledger Card (Second Debtors) | Security

- Security permissions for accessing Statement/Ledger Card Second Debtors must be enabled via the appropriate menu settings.

Certificates | Search Certificates Issued

- A new search option, ***Search Certificates Issued***, displays certificates issued for a selected

building or across all buildings (depending on filters)

StrataMax v5.6.148 □ Released 29th January 2026

Creditor Maintenance | BPAY Biller Code Validation

- BPAY creditors now require a Biller Code before saving.

Override On: Master Chart updates to match local BPAY details unless Master is EFT (no BPAY saved).

Override Off: Master Chart updates to match local BPAY details, and EFT will convert to BPAY automatically.

Report Distribution | GLMax Ledger Card

GLMax Ledger Card now opens directly in Report Distribution mode when the preview feature is enabled. Report style can be configured via the cog menu.

Levy Management | Levy Generation Schedule Filter

- A new Account Manager filter has been added to the Levy Generation Schedule report. Works with the Select Building filter.

Report Distribution | Ledger Card Templates

- Multiple Ledger Card templates have been converted to the new style of templates.

Creditor Invoice Work Queue | Delete Document

- The Delete Document option has been reinstated in the Creditor Invoices Work Queue properties screen.

StrataMax v5.6.146 □ Released 21st January 2026

DocMax & BCMax | Building Locked Search Field

- A new search field, *Building Locked*, is now available in DocMax and BCMax building searches. This allows filtering of locked or unlocked buildings using 'Yes' or 'No' values. It is available in DocMax Advanced Search and Work Queues, helping ensure documents for locked buildings do not appear in queues such as Creditor Invoice Work Queues.

Plan Report | Enhancements

- The Plan Report has been updated to display Lot Plan numbers correctly and improve space formatting for better readability.

DocMax | Lost Buildings

- DocMax now supports adding documents to lost buildings. Use this feature with caution—if 'Upload to Portal' is enabled in document properties, the document will remain in pending upload status.

StrataMax v5.6.145 □ Released 15th January 2026

DocMax | Code Refresh Stage Two

Stage 2 of the DocMax code refresh improves reliability and performance. Enhancements include:

- Multi Expense Invoice Items auto-add new lines when expense accounts are set.
- Add GST option for invoice items.
- View Expense Account History from Invoice Details.
- Document Import now supports csv files.
- Sub-Groups and Lost buildings can be filtered in searches and work queues.

Categories | Remove Individual Selection

- Categories selected using 'Is Any Of' can now be removed individually by clicking the 'x' beside the selection.

GLMax | Company Documents

- Property Documents are no longer enabled for GLMax Company documents; set them to Internal only.

Meetings | Add New Meeting

- Clicking 'Add Meeting' in the Building Information area for the meetings section opens a pop-up form. Saved meetings display in chronological order.

Security | Reverse Levy Permission

- New permission added to Security Setup for 'Reverse Levy'. If denied, the option is greyed out.

Report Distribution | Resume Failed Distribution

- Failed distributions can now be resumed or repeated from the Report Distribution log.

Search Contracts | New Feature

- Search contracts across local buildings or global portfolios with extensive filter options. Results can be exported to Excel or printed.

Levy Management | Purpose / Reason Column

- Special Levies now display Purpose/Reason in Levy Management.

Levy Register Summary | Order by Settings

- Levy Register Summary report now respects the order settings from Levy Register.

Task Management | Enhancements

- Double-click to create new tasks in calendar view.
- Notifications for upcoming and overdue tasks (default 7 days). Configurable in settings.

Office Bearers | Invoice Hub Approvers

Contact Entity or Office Held cannot be changed once linked to a Portal User Account to prevent conflicts.

Report Distribution | Global Configurations

Abbreviations for global report configurations now display in Report Distribution.

Owner's Tax Year Report | New Menu Item

New menu option to generate Owner's Tax Year Report in Report Distribution mode. Setup migrated to Roll.

Ledger Card | Preview Feature Enhancements

- New configuration options (Legal Action wording, Due Date wording, Skip Zero Balance).
- Tagged lots no longer default.
- Receipt Entry and Utility Buildings open in Report Distribution mode.

Levy Notice Configuration | Last Generated Setting

New setting allows levy notices to show last generated levies regardless of tag conditions.

Invoice Hub | Wording Update

Updated wording to "Invoice marked as Approved" when invoices are approved on the portal.

Preview Features | Planned Removal

Certificates, Subgroup Update Report, Receipt Report, and Report Set preview features will be removed in v5.6.149.

StrataMax v5.6.144 □ Released 4th December 2025

Select Contact | ABN and ACN Search

- The Select Contact screens now allow searching by ABN and ACN for easier identification of contacts.

Report Distribution | Preview Screen Summary Button

- The Proceed button has been replaced with a new summary button in the Report Distribution Preview screen. This displays email count, print pages, and DocMax distribution before execution for better transparency.

Certificates | Sealing Clause Merge Field

- A new merge field `{BuildingPlanNumber}` has been added to the Sealing Clause for ***Certificates*** to output the Building Plan Number when different from the Lot Plan Number.

Address Lookup Updates

- Postal address handling has been improved for Roll | Contacts:
  - Suburb/State/Postcode on line 2.
  - Long Suburb/State/Postcode lines split to line 3.
  - Addresses prefixed with 'ATT' are ignored.

Task Management | Building Transfer In

- A new Event Type in ***Task Management*** for 'Building Transfer In' automatically creates a task checklist when transferring a building into StrataMax.

Journal Preparation Enhancements

- **No GST Option:** Hidden for buildings not registered for GST.
- **Auto-Reverse Journal:** Auto-reverse journals now post automatically without reopening ***Journal Preparation***.

Certificates | Levies by Building Year

- New configuration allows levies to be calculated using the Building Financial Year for ***Certificates***.

Certificates | Building Information Section

- **Vic Requisition Data:** Migrated to the new ***Certificate*** module.
- **Multi OC Support:** Separate sections for each OC in multi-account group buildings.
- **Other States:** Certificate data entry now available in ***Building Information***.

Certificates | Building-Specific Cover Letter Text

- Local text can now override global text for Certificate cover letters.

Report Distribution | Ledger Card Internal Template

- New internal ***Ledger Card*** template excludes name/address and displays Lot and Unit numbers.

StrataMax v5.6.143 Released 24th November 2025

Reports/Utilities (Global)

- Several reports in Global Reports have been replaced with Searches or other reports.

Certificate Section 56

- A new Certificate Section 56 has been introduced for ACT Buildings with 'Community Title Scheme' type and 'Community' regulatory module. The certificate merges data from StrataMax where possible (e.g., Building Info, Address, Office Bearers, Insurance, Levy Management). Info Editor enhancements allow global or building-specific data entry for certificates.
  Note: Section 9 cannot merge document names; include a Contents Page for clarity.

Report Distribution | Excel

- Column formatting is now activated for reports exported to Excel, ensuring decimal precision (e.g. four decimal places).

Report Distribution | Ledger Card

Two new configuration settings added for the ***Ledger Card***:

- **Style** – All history option for historical reporting.
- **Interest Setting** – Date for interest calculation (blank defaults to Today).

Account Maintenance | Account Group and Copy to Buildings

- Account Group selector in ***Account Maintenance*** now validates eligible groups and supports copying system flag changes across buildings. Rules apply for zero balances, single/multiple account groups, and copying changes across buildings.

StrataMax v5.6.142 □ Released 6th November 2025

Invoice Hub and DocMax Building list

- The building list available in ***Invoice Hub*** and 'Copy to Buildings' in DocMax, has been updated to use the standard StrataMax Building list.

Ledger Card | Preview feature

- A new option has been created under User Preview Features, which allows the ***Ledger Card*** to be run via ***Report Distribution***. This option will be especially helpful when generating the Ledger Card for a *Lost Building*. If you require further configuration settings or previous Historical Year Ledger Cards, toggle the Preview Feature back to the Legacy Ledger Card.

Section 55 Report (NSW)

- Enhancements have been made to ***Report Distribution*** to assist Strata Managers in efficiently issuing Section 55 reports (6 monthly reporting) for the delegation of duties using ***Report Set*** now available via ***Report Distribution***. See page 4 for more info.

Report Distribution | New Fields

- New fields have been added to the ***Report Distribution*** Log. See page 7 for more info.

StrataMax v5.6.141 – Released 23rd October 2025

Contacts | Address Lookup

- Users can now use Australian address lookup directly within contact cards. This enhancement allows faster and more accurate data entry, with verified postal addresses, built-in abbreviations, and automatic formatting across address fields.

Roll Contacts | Include Inactive

- A new 'Include Inactive' option has been added to the Select Contact screen in the ***Roll*** and ***Resubdivision*** modules. This allows users to re-select prior owners who are no longer active, improving data integrity and preventing duplication.

NSW Legislation | Receipting to Lots in Arrears

- Effective 27th October 2025, NSW legislation mandates a new receipting order for payments made by owners in arrears. A new configuration setting, 'NSW Overdue Levies Allocation Rule', has been added under ***Receipt Entry*** and is enabled by default. It affects Receipt Entry, Bank Reconciliation, Debtor Adjustments, and Rationalise Sub-Balances.

Report Distribution | Aged Balance Reports

- Debtors Aged Reports are now available as separate selections in Report Distribution:
  - Aged Balance
  - Aged Balance (Second Debtors)

    These match existing reports and are available for Sub-Group buildings with appropriate templates.

StrataMax v5.6.140 – Released 14th October 2025

TaskMax | Reference Number in DocMax

- Finalised Work Orders in ***TaskMax*** now include the reference number in the DocMax title when saved. If 'Enable Saving Work Order to DocMax' is enabled, the document will automatically save with the creditor name and reference number.

Levy Management | Manual Levies Determined Date

- A new field for 'Determined Date' is now available when entering manual levies in ***Levy***

Management. This date will default to today's date and may appear on Levy Notices or Certificates depending on template settings.

Report Distribution | Show Arrears Setting

- A new global setting allows arrears to be shown when distributing levies. This is enabled by default and should be reviewed during the first levy run after updating to v5.6.140.

ATO SBC Client | TLS 1.3 Update

- The ATO will require TLS 1.3 for secure connections from early next year.
  Please contact StrataMax Support to update your SBR Client installation. IT provider assistance may be required.

StrataMax v5.6.139 □ Released 26th September 2025

New South Wales Levy Template □

- New strata laws being rolled out later in 2025 will require strata schemes to provide a new 'Financial hardship information statement' with each levy notice issued to NSW strata owners. This change will give strata owners clear information about their options if they are unable to pay their levies.

Levy Management | Enhancements

- Manual levies can now be created with a zero-dollar value using the new "Zero Levy" option.
- Levy Notices can now be configured to show zero amount levies. This is a global setting and defaults to 'On' after upgrade.
- The Net Rate Per U/E column has been reintroduced into the Levy Management screen.
- Budget amounts now display both Net and GST-inclusive values for GST Net Style buildings.
- New configuration allows postal address inclusion on Levy Notices when split contacts share an email and preference is set to email.

Merge Letters | Report Name Field

- A new "Report Name" field is available in Merge Letter email templates, both for one-off and permanent use via Email Template Manager.

Roll | Lot Documents

- Column order in Lot Documents has been updated to make the Email Recipient visible without scrolling.

Report Distribution | Search Recipient

- Users can now search by recipient type, improving navigation across Lot numbers, Unit numbers, Email addresses, and physical addresses.

Search Insurance | Commission Fields

- Two new fields added: “Commission Last Amount” and “Commission Last Paid”, which can be sorted and filtered.

Preview Features | New Stored Reports Interface

- Stored Reports now open in a new interface with enhanced search, filter, resend, and reprint capabilities. Includes right-click menus and column rearrangement.

New Menu Item | Meeting Summary

- A new menu item replicates the Meetings button functionality for faster access to meeting details.

Report Distribution | New Owner Roll Details

- New templates “rollnew” and “rollnew1” (no Company Title) are available for certificates.

Qld Certificates | Levy Periods

- Levy periods added to Qld Certificates: Form 33, Form 34, and Form 18. Special levies excluded.

StrataMax v5.6.138 □ Released 8th September 2025

Security | Delete Business Statement

- A new permission has been added to ***Security Setup*** to control access to the 'Delete' option in the *Prepare BAS screen*. This is disabled by default and must be explicitly granted.

Local Transactions | Additional Account Codes in Search

- Account codes that cannot be posted to directly (e.g. equity codes like 004 and 005) are now available in the Account Code search for ***Local Transactions***.

Legislation | New Regulatory Module for BUP/GTP

- The ***New Building*** screen now supports the ‘IRDA’ regulatory module for BUP/GTP building types, aligning with legislative requirements.

Report Distribution | New Configuration Options

- New financial year configuration options (‘Current Year’, ‘Old Year’, ‘Old and Current Year’) are now available for several reports including Account Summary, Creditor Balances, and Bank

Reconciliation.

Local Transactions | Tax Code Enhancements

- The Tax Code field now includes GST and GST Clearing options, which will display against relevant transactions.

Multi Expense | Add Invoice Item

- A new 'Add Invoice Item' button is now available in ***DocMax***, ***Creditor Invoices***, and ***TaskMax***, allowing multiple expense items to be added to invoices.

Report Distribution | Additional Reports

- New reports such as ***Asset Register***, ***Contract Register***, and ***Dispute Register*** are now available in ***Report Distribution*** modules like ***Certificates*** and ***Merge Letters***.

StrataMax v5.6.137 □ Released 22nd August 2025

Inspections | Default Inspections

- A change has been made in ***Inspections*** in the *Add/Edit Inspection Types* screen, and ***Search Inspections*** screen to update the *Default Inspections* drop-down list to be in alphabetical order.

Levy Management | Levy Reports

- Enhancements have been made in ***Levy Management*** to include the *Levy Register Summary* in the *Report* menu and show 'Proposed' on Levy Register templates when 'Proposed only is ticked'. See page 4 for more information.

ACT Rental Certificate | Insulation Status

- From 1st July the Unit Titles (Management) Rental Certificate Determination 2025 came into effect, which made amendments to provide further clarity about what units are required to provide for ceiling insulation information. Enhancements have been made to add 'Class B – Not Applicable' to the Lot Edit Insulation Status found in the ***Roll*** for correct reporting on the Rental Certificate.

DocMax | Selection Changes

- Various field value selectors have been enhanced for better performance and stability in Document Searches and document Properties view. See page 8 for more information.

New Security Option

- A new permission in ***Security Setup*** has been added to for *Show Generated Levies* configuration.

Preview Features

- This release introduces another two more preview features for the following modules:
    - StrataMax Building Uploads (StrataMax)
    - New Subgroup Manager (New Sub-Group and Delete Subgroup)

Levy Management | Override Levy Generation Due Date Validation

- To cater for exceptions where levy due dates fall outside the legislative requirement days, we have added an option in the *Create Transactions and Notices* screen to override the due date validation. A new permission in ***Security Setup*** is available to manage access to the override.

Certificates | Account Selection

- Account selection has been added to ***Certificates***. This will determine which lot/s a certificate will be produced for. Click the selector beside *Accounts* and set the required account.

StrataMax v5.6.136 □ Released 5th August 2025

Certificates Preview | Integration with Report Distribution

- This release introduces a new preview feature for ***Certificates***, utilising *Report Distribution*. Users will have the ability to switch between the two interfaces Legacy Certificates and Certificate Preview as needed if permissions are granted to do so.
    - A new security permission 'Change Preview Features' has been introduced in ***Security Setup*** to control user access to switch between Legacy Certificate view and the Certificate Preview.
    - When a user has Certificate Preview enabled and selects the Certificates module, the *Report Distribution* window will automatically open.

StrataMax v5.6.135 □ Released 29th July 2025

Task Management | NEW □

- A brand-new Task Management screen has been developed from the ground up to provide clear visibility and to allow users to manage tasks throughout their lifecycle. For all the information you need about ***Task Management***, see the attached release notes as well as the *Task Management | Configuration & Security* and *Task Management* articles.

Levy Management | Re-Write □

- The Levy Management screen has received a complete refresh and is the first stage of the Budget, Levy Management and Arrears refresh project. This first stage focuses on providing an improved user interface and experience in ***Levy Management***, while using new fields from Levy Invoice Code Setup to streamline the creation of new levies based on budgets. For all the information you need

about the new ***Levy Management*** screen, see the attached release notes as well as the *Levy Management | New*, *Levy Invoice Code Setup | New*, and *Merge Levy Notice Setup | New* articles.

Creditor Invoice Activity Report

- Update has been made to the *Creditor Invoice Activity Report* template configuration; clients now have the option to 'Exclude Hidden Transactions' when generating the report.

Notes Viewer

- The Notes screen has been enhanced for better performance and stability. See page 4 for more information.

QLD Certificate Changes | 1 August 2025

- Further enhancements have been made to allow users to enter information in the *Info Editor in Certificates*. This will allow clients that do not use StrataMax Registers to store information to reflect on the certificates. See page 6 for more information.

StrataMax v5.6.134 □ Released 14th July 2025

Change Tax Code

- Broader support has been added to the process of changing *tax codes* to allow tax codes to be changed.
  This is to assist where GST is accounted for after transactions have been written to the general ledger. For example, the tax code for receipts posted to non-debtor accounts can now be changed. See page 3 for more info.

Updates to Search Screens

- Search screens where 'Legislation' can be selected as a filter / field have been updated to be a multi-column selector for legislation selection. See page 5 for more details.

Global Transactions

- ***Global Transactions*** has been updated to support reporting subgroup transactions. This enhancement is now available across both Main and Subgroups within the ***Global Transactions*** and ***Local Transactions*** screens. See page 6 for more details.

QLD Certificate Changes | 1 August 2025

- From August 1st, 2025, the updated Property Law Act comes into effect. As a result, the Disclosure Statement will be removed from StrataMax and the StrataMax Portal. This will also change how certificates are produced in StrataMax for buildings managed in Queensland. All new certificates

will be available from the 1st of August 2025. See page 6 for more details.

StrataMax v5.6.133 □ Released 27th June 2025

Search Creditors | New Field added 'Ok to Pay'

- A new 'Ok to Pay' field has been added to the ***Search Creditors*** screen.

Search | Predefined searches added

- New pre-defined searches have been created to assist clients on common industry queries to assist when producing regular data exports and dashboards. See page 3 for more details.

New Register Categories | Common Property and Contracts

- The ***Common Property Register*** and ***Contracts Register*** have been new categories. See page 5 for more info.

Searches | BPAY Biller Code

- The BPay Biller Code field for various searches has been changed to report the correct formatting. See page 6 for more info.

Search Creditor Invoice Items | New Field added

- A new 'Payment References' field has been added to the ***Search Creditor Invoice Items*** screen.

Report Distribution | TRMax Recoveries

- Enhancements have been made to TRMax Recovery and TRMax Consultancy reports when running them via ***Report Distribution***.

New Certificate | ACT Rental Certificate

- A new Rental Certificate option is available for all ACT clients. The Unit Titles Management Act 2011 requires all landlords to provide a rental certificate to tenants before a new or renewed lease for a unit or townhouse within a unit title complex in ACT. See page 8 for more details as well as the ***ACT Rental Certificate*** article.

StrataMax v5.6.132 □ Released 12th June 2025

Reports/Utilities (Global)

- A new notification message has been added to the ***Reports/Utilities (Global)*** menu. This message informs the user that this icon / menu is being gradually phased put, as most reports have been

moved to ***Report Distribution*** or ***Search*** screens.

Master List legacy reports removed

- Three legacy reports (Master List / Master List Tax Code / Master List Account Group) have been removed from StrataMax, as the varied reporting outputs are now replaced by ***Search Local Accounts***. See page 3 for details.

Enhanced Email Communication logging

- Additional logging has been added to ***Communication***. The system will now capture and log detailed information when various email actions take place.

Search Buildings | Enhanced field options

- Various fields in ***Search Buildings*** have been updated to only 'Yes or No' options, eliminating the previously 'Not Set' choice. See page 5 for details.

Inspections Register | Completely Updated & Enhanced

- The ***Inspections Register*** has been enhanced with a new user interface to simplify the creation and management of Inspections. The new icon is called ***Inspections*** and will replace the existing icon and screen, containing the same functionality as well as some new updated functions and features. See page 6 for more information

Search Inspections

- A variety of enhancements have been made in order to accommodate the new***Inspections*** screen. See page 20 for more information.

Building Information | Report

- The 'Last 'Inspected by' and 'Next Due date' for each inspection in the***Inspections*** screen will populate the report in ***Building Information*** for inspection types that have the correct 'Default For' setting.

Merge Letters

- Users can now insert merge fields from the ***Inspections*** screen into a ***Merge Letter***.

Log Viewer

- The 'Log Viewer' in StrataMax has been designed to give users the freedom to apply more refined selections making searches quicker and results easier to review.

StrataMax v5.6.131 □ Released 29th May 2025

Change Code Number

- In *Change Code Number*, when selecting accounts, the 'Account Code List' window now has *Show Inactive Creditors* and *Show Restricted Accounts* tick boxes.

Search Screens | New Tag Select Option

- Enhancements have been made to some StrataMax Search screens and DocMax searches to allow tagging of multiple codes. The tag selection will be available for the field conditions 'Is Any Of' and 'Is Not Any Of'. See page 4 in the release notes for more details.

Communication | Spell Check

- In the ***Communication*** screen a new spell check function, similar to MS Word has been implemented when composing an email. Words that are spelt incorrectly will be underlined within the email.

SBR | Download and Install Option

- When opening the ***ATO SBR Client*** in StrataMax, a check occurs and a new message will appear for users who have not installed the standalone version of the SBR client. When users see this message and click the button, SBR will be automatically downloaded and installed.

New feature icon | What's New

- An icon called "What's New" has been added to the StrataMax desktop on the top right. When users click this icon, they will be directed to the *"What's New" Online Help article*. This feature is designed to better highlight important new updates for users.

StrataMax v5.6.130 □ Released 1st May 2025

Set Bank Account Limits

- The 'Set Overdraft Limit' feature has been renamed and enhanced to include bank selection and integration with ***Bank Account Setup***.

Hold Auto Payments

- A new setting allows buildings to be excluded from global and auto payment runs, with clear on-screen indicators.

Bank Account Setup Access

- Users can now access 'Set Bank Account Limits' directly from ***Bank Account Setup*** if they have the correct permissions.

Security Permissions Update

- Permissions have been renamed to align with the new 'Set Bank Account Limits' feature name.

Communication Enhancements (.Net8)

- Email formatting options have been expanded through an upgrade to .Net8, offering improved compatibility and styling.

Transaction List

- The Transaction List will now use the Report Distribution window. Multiple Account Codes can be selected from the Report Distribution screen.

Levy Notice and Arrears Final Fee - VCAT Changes

- Victorian Fee Notices have been updated to reflect legislative VCAT wording changes.

Outlook Add-in

- A new configuration option has been added to the StrataMax Outlook Add-in to allow users to select whether the set profile will be applied when using "Add With Details".

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StrataMax v5.6.129 Released 17th April 2025

Bank Reconciliation | Posting to Clearing Accounts

- This release introduces stricter validation controls in ***Bank Reconciliation*** to prevent users from posting directly to tax clearing accounts such as 'PAYG Withholding,' 'GST Clearing,' and 'PAYG Instalment Clearing.' These changes are designed to improve compliance and ensure correct posting to the ATO creditor account.

StrataMax Add-in for Outlook

- The StrataMax Outlook Add-in has been updated and will be automatically applied when users update to the latest version of the StrataMax. The new add-in introduces changes to login behaviour and enhances functionality related to *Work Queues* in DocMax.

StrataMax v5.6.128 Released 3rd April 2025

Building Information | Clarity Enhancements

- Fees and Payments are now split into two sections in ***Building Information***: **Debtors Fees & Payments** and **Creditor Invoices & Payments**.

- The "Invoices to be Approved" field is now renamed to **Invoice Approval Required**.
- The **Creditor Invoices & Payments** section has been reordered for improved readability.

EFT Manager | Enhancements

- Email addresses for individual payments are now displayed instead of creditor-linked emails in ***EFT Manager***.
- Users can now easily identify when a Remittance Advice will not be emailed and why.

Search Creditors | Enhancements

- Users can now select the **Master Chart** as the building number when using Search Creditors.
- The ***Search Creditors*** feature is now available when the **Master Chart (0000)** is set as the main building selection.

Payments | New Warning Message

- A warning message has been implemented in ***Payments***. This message will appear when a creditor paid via EFT has both a payment and a credit note with different EFT references.

StrataMax v5.6.127 □ Released 20th March 2025

Tax Setup - PAYG Instalment

- ***Building Information*** / *Tax Setup* now supports $0.00 or a percentage of 0.00% in the Tax Setup Section.

Opening Balance Setup - Refresh

- Enhancements to the ***Opening Balance Setup*** module which include:
  - Layout Refresh.
  - Balance Sheet Improvements.
  - Debtors Display.
  - Financial Year Display.
  - Process Date Selection.
  - Consolidated Input Form.
  - Add Accounts Functionality.
  - Search Feature.
  - Administration and Sinking Fund Summary.
  - Preview Financials.

StrataMax v5.6.126 □ Released 5th March 2025

Journal Preparation | View Archive

- Enhancements have been made to improve the accuracy and clarity of journal archives, specifically to the Report Template and the 'View Archive' window.

Income Tax Report / BAS Reconciliation Report

- The building number will now show when extracting both single and multiple worksheets when exported to Excel via ***Report Distribution***. The reports affected are the ***Income Tax Report*** and ***BAS Reconciliation Report***. This will assist users to make information traceable back to the building especially when being used to send externally to auditors and accountants.

Process Bank Statements | Manual Accounts

- In ***Process Bank Statements*** any manual bank accounts with statement data, the screen will now show a new option in the generated column.

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' drop-down 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 appears. This new function is available from any of the following screes: ***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 or 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.