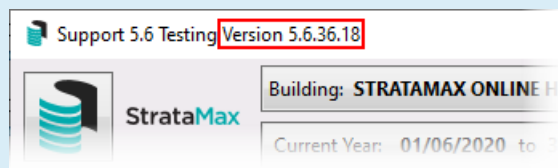


StrataMax Release Notes

Last Modified on 02/06/2025 11:26 am AEST

This page contains the most recent release notes for the StrataMax product. A summary of the updates is provided below, however the release notes contain further details about updates and changes to the software. These updates may also contain minor fixes and enhancements to improve product stability and performance, and are displayed on the last page of the release notes document.

Not all version releases will require release notes; if a version not listed below is installed, there are no specific release notes for that version. The current version of StrataMax is displayed in the top left of the StrataMax screen.



If you encounter any issues while your software is being updated, please contact the StrataMax Support Team at support@stratamax.com.au or on (07) 5575 7422.

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".

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 buildings 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.