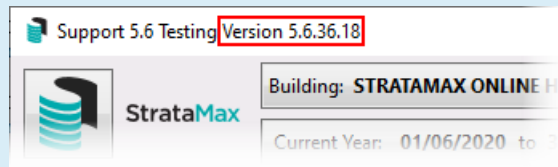


# StrataMax Release Notes

Last Modified on 26/06/2026 12:15 pm 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](mailto:support@stratamax.com.au) or on (07) 5575 7422.

## Preview Feature Versions

These are the current projects that require activation from the Support Team. Access will be progressively enabled allowing a smooth and supported transition. If you would like early access, please have your administrator log a request with our Support Team at [support@stratamax.com](mailto:support@stratamax.com) who will help coordinate timing.

## Creditor Invoices Refresh

### Creditor Invoices | Refresh Preview Interface

- New security permissions have been introduced to control access to preview features, Work Queues, auto-processing functions, and invoice editing capabilities. Additional permissions allow actions such as editing descriptions, reversing invoices, tagging paid invoices, and entering invoices without attachments.
- A refreshed Creditor Invoice interface has been introduced, providing a more modern, intuitive user experience with reduced data entry and improved workflow efficiency.

- A new Creditor Invoice (Preview) module is available, allowing users to trial the updated interface while retaining access to the legacy version.
- Duplicate invoice detection has been added during entry and saving, with a new permission to allow duplicates where required.
- Users can now post invoices to a prior financial year to support accrual processing.
- Work order selection has been enhanced with advanced search functionality and visibility of uninvoiced work order counts in the creditor list.

### **Creditor Invoices | Work Queues**

- A new Creditor Invoice Work Queues module has been introduced to streamline invoice processing and integrate with DocMax data.
- The 'Start Queue' option enables step-by-step review and processing of invoices with validation and document preview.
- 'Auto Create All' allows bulk creation of invoices using pre-filled DocMax data, improving efficiency for high-volume processing.
- Users can skip, clear, or relink invoices during processing to maintain workflow flexibility.

### **Creditor Invoices | Additional Enhancements**

- Enhancements have been made to Creditor Invoice transactions across Search, Interactive Reports, and Creditor Management.
- Journal posting to creditors has been restricted, guiding users to use invoice-based workflows instead of legacy journal entries.
- Additional paid date fields have been introduced across transaction screens for improved visibility.

### **DocMax | Invoice Creation Integration**

- Creditor invoices can now be created directly within DocMax using the new 'Create Invoice' option in Invoice Details.
- Invoice data entered in DocMax is automatically populated into the Creditor Invoice screen, reducing duplicate data entry.
- Work Queue integration enables invoices prepared in DocMax to be processed manually or automatically in StrataMax.

### **DocMax | Invoice Management Controls**

- A new 'Details' option allows users to access and manage Creditor Invoice details directly from DocMax after processing.
- Users can edit descriptions, tax codes, invoice numbers, EFT references, and manage hold/paid statuses from DocMax.
- New compliance search fields have been added to DocMax Advanced Search for improved reporting.

- A 'Manual Entry' option allows documents to be excluded from automatic processing, supporting more complex workflows.

## Levy Arrears to Report Distribution ▢

### Levy Management | Levy Arrears Report Distribution

- A refreshed Levy Arrears experience has been introduced, integrating arrears notices and reports into the Report Distribution framework. This enhancement modernises configuration, improves usability, and streamlines how arrears notices are generated, managed, and distributed.

### Levy Management | Arrears Notice Setup

- The Arrears Notice Setup screen has been redesigned with a simplified and modern interface.
- Improvements include enhanced template selection, support for merge and standard templates, ledger card attachments showing generated arrears fees, and options to include cover letters and deposit slips.
- Configuration supports days overdue thresholds, minimum arrears amounts, and arrears fee assignment per notice type.

### Levy Management | Arrears Fee Setup

- A new enhanced Fee Setup interface allows configuration of arrears fees at a global or building level.
- Fees can be charged to debtor accounts or to the building only, with integration to TRMax exports and GLMax invoice codes.
- Bulk management options include exporting fee setups to Excel and copying configurations across buildings.

### Levy Management | Levy Arrears Pre-Issue and Overdue Reports

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- New style Levy Arrears Pre-Issue and Overdue Reports are now available.
- The Pre-Issue Report supports single or multi-building execution and exports to Excel.
- The Levy Overdue Accounts Report is available in Report Distribution mode with configurable inclusion and exclusion options.

### Levy Management | Message Maker (Report Distribution)

- A refreshed Message Maker interface allows management of Global and Building-specific messages for Levy Arrears and Levy Management notices issued via Report Distribution.
- Messages can be added, edited, activated, or deactivated, with existing messages migrated during

upgrade.

## Levy Management | Arrears Manager

- A new Arrears Manager module provides a centralised view for monitoring and managing levy arrears.
- Users can review overdue balances, identify issues preventing notice generation, enable or disable notices per account, manage issued notice flags, access arrears notes, and review consolidated logs.

**Preview Feature Note:** Levy Arrears Report Distribution is available as a Preview Feature and must be enabled via feature configuration as part of a controlled pilot rollout. Please reach out to our Support Team regarding version updates.

## StrataMax v5.6.157 Released 25th June 2026

### Inspections | New Bulk Change Enhancements

- A new *Bulk Change* functionality has been introduced in *Inspections*, allowing users to update multiple *Inspection Types* simultaneously. Fields that can be updated include Abbreviation Code, Type Name, Frequency, Category and Default Inspection. Additional filtering options (Default Inspection Types, Buildings, Type Name, Code and Categories) improve search capability, and a new 'Copy from Selected' option enables users to duplicate settings across multiple inspections. Security permissions have also been added to control access to bulk updates.

### Levy Management | Levy Charge Schedule Report

- In *Levy Management* a new Levy Charge Schedule report has been introduced, including Notice Date and Paid Date to provide better visibility of levy activity.

### Levy Management | Arrears Report Distribution Enhancements

- Significant improvements have been made to the arrears functionality within *Report Distribution*:
  - Arrears Manager now includes Ledger Card access and Excel export capability
  - New configuration to allow report generation when no overdue accounts exist
  - Export All functionality added across Arrears Fee Setup and Template Configuration
  - Ability to export both Local and Global templates
  - Pre-Issue Reports enhanced with additional columns (e.g. Legal Action Date, Committee Member)
  - New 'Arrears Notice Disabled' field added to reporting

### Payment Entry | Letting Agent Selection

- Enhancements allow users to select letting agents when processing payments in the **Payment Entry** screen. A new Contact dropdown displays both owners and agents linked to the lot, improving refund accuracy.

### Report Distribution | Auto Proceed Option

- A new 'Auto Proceed on Load Complete' option allows reports to be automatically processed and distributed without preview, streamlining report delivery workflows.

### Return Address Editor | Redesign

- The **Return Address Editor** has been redesigned with a new interface and now stores data within the database rather than external files, improving accessibility and data integrity.

### Creditor Invoices | New Preview Interface

- A refreshed Creditor Invoice interface is available as a *preview feature*, delivering improved usability and efficiency. Enhancements include duplicate invoice detection, bulk invoice creation, improved work queue navigation, advanced work order selection, and support for prior financial year processing. A new **Security Setup** permission controls the ability to create duplicate invoice numbers.

### Funds Management | Preview Feature (NSW)

- The **Funds Management** report is now available as a preview feature via **Report Distribution**, with improved formatting and enhanced configuration options including period end date selection.

## StrataMax v5.6.156 □ Released 11th June 2026

### Certificates | Section 184 – Section 9 Balance Field (NSW Only)

- A new Balance field has been introduced for Section 184 Certificates in NSW to include "Contributions Towards Costs of Legal Proceedings" levy data within Section 9.

### Owners Info | Ledger to Excel/File

- Enhancements have been made to **Owners Info** Preview to introduce a new Ledger option available to show in Excel, providing a detailed transaction-level view of owner financial activity.

### DocMax | Work Queues – New Restrictions & Document Searches – New Fields

- Enhancements to DocMax Work Queues now allow greater control through new restriction filters, including *Scheduled Creditor Invoices* and *Data Size*.
- New searchable fields have been added to document searches, including *Creditor Invoice*, *Scheduled Creditor Invoice*, and *Data Size*.

## Month End Rollover | Lock Old Year Transactions

- A new global configuration setting, "Lock Old Year Transactions," has been added to month end rollover settings, which when enabled will prevent users from entering transactions into the previous financial year.

## Creditor Invoices (Preview) | Document Display Enhancement

- The Creditor Invoice (Preview) interface has been enhanced so that the document attachments window is displayed by default, providing immediate access to document actions and improving usability.

## StrataMax 5.6.155 □ Released 29th May

### Creditor Invoice | Preview Enhancements

- Enhancements have been made to Creditor Invoice Preview, improving the Work Order Search selection with updated default fields and columns for better visibility and usability.
- Field selection has been improved by converting Creditor Code and Expense Code from free-text entry to selectable lists in the Select Work Order screen.

### Creditor Invoices | Scheduled Creditor Invoices

- A new **Scheduled Creditor Invoices** module has been introduced to automate and manage recurring or future-dated invoices.
- Includes manual and automatic processing, overnight scheduling, **DocMax** integration, and improved visibility.
- New **Security Setup**, named Creditors\_ScheduledInvoices have been added.
- Transferred buildings with active schedules will have schedules placed on hold for review.

### Local Transactions | Year Selector Enhancements

- The **Local Transactions** Year Selector now supports viewing up to seven years of historical data.
- Each year can be selected individually for improved clarity and reporting accuracy.

### Utility Subgroups | Record Reading List Search

- A new **Record Reading List** search enables detailed reporting on utility meter readings which supports advanced filtering, customisation, and export functionality.

### Search Enhancements | Account Type Field

- A new **Account Type** field has been added to **the Search Local** and **Global Accounts** and **Local** and **Global Transactions** searches, allowing filtering and reporting by account type, such as Income or Expense.

### Search Enhancements | Grouped Summary Option

- A new Grouped View allows users to summarise and analyse search results directly.
- Supports grouping, sorting, exporting, and printing for improved reporting efficiency.

### Building Information | Transaction Lock

- A new Transaction Lock setting allows locking of transactions from the previous financial year and includes a new **Security Setup** permission titled *Edit Lock Last Year Transactions / Audit Done Settings*.

### Search Enhancements | My Buildings Restriction

- A new 'My Buildings' restriction enables filtering searches to assigned buildings only.

### Buildings | Locked Buildings Handling

- Enhancements have been made to prevent selecting buildings locked by other users. These buildings are now disabled in selection lists and automatically excluded from bulk selections.

## StrataMax 5.6.154 Released 15th May

### Levy Register | New Menu Icon

- The **Levy Register** is now available as a menu icon and can be added to the desktop to streamline access to levy reporting. Existing security settings remain unchanged.

### Merge Letters | Building Web Address

- A new merge field allows the Building Web Address from the **Building Information** screen to be inserted into **Merge Letters**.

### Report Distribution | Label Printing

- Label printing is now available via Report Distribution and the Current Label function.
- Enhancements include override address titles, duplicate removal, selectable starting label, export of address and email lists, and support for "The Resident".

### Report Distribution | Consolidate by Email Address

- Reports and notices for multiple lots sharing the same email address can now be sent in a single email with separate attachments.
- This can be configured as a default setting or applied on a per-use basis, reducing duplicate emails and improving efficiency.

### Owner Information | Refreshed Preview Module

- A refreshed **Owner Information** is available as a Preview Feature.

- Improvements include a modernised interface, improved navigation, enhanced data visibility, and consolidated access to key lot, contact, account, reporting and portal information.

### Bank Reconciliation | Enhancements and Validation

- Improved validation prevents automatic account population for invalid or unknown transaction references.
- On-screen prompts assist with identifying subgroup-related transactions.
- **Search Bank Statement History** now displays subgroup associations.

### Levy Management | Message Maker


- A new **Message Maker** allows configuration of Global and Local messages for levy notices distributed via **Levy Management**.
- Messages can be activated or deactivated, migrate automatically on upgrade, and follow existing print message settings.

### Strata Manager | New Annual Report

- A new Annual Report has been introduced to provide a consolidated summary of management activity for a building over a financial year or selected date range. The report includes key KPIs and operational metrics, with optional supporting reports, delivering a single, streamlined reporting solution.

## StrataMax 5.6.153 □ Released 27th April

### Roll | Ledger Card Report Shortcut

- Enhancements have been made in the **Roll** to improve access to **Ledger Card** reporting. A new shortcut to the **Ledger Card Report** option has been added to the  View Ledger Card icon, allowing users to open Report Distribution and generate the Ledger Card Report directly from the Roll.

### Bill Manager | Module Removal

- The Bill Manager module has been disabled via configuration as it is no longer actively used. The module can be re-enabled upon request to the StrataMax Support Team and is planned for permanent removal in a future release if there is no client demand.

### Security | User Group Entities

- Assigned user groups will now be removed from **DocMax** profiles, Saved Searches, Work Queues and BCMAX saved searches when deleted from **Security Setup**, with a confirmation message displayed prior to deletion.

### Voting Register | Quorum Percentage

- The Voting Register Quorum Percentage field will now default to the value set in **Building Information**. If no value is set, the default will be 25%. A new tooltip has been added to explain the behaviour of this field.

### Debtors | Arrears Notice Disabled

- A new field has been added to **Local** and **Global Debtor** Searches to identify accounts flagged as *Arrears Notice Disabled*. The field can be used as both a search condition and a column.

### Search Buildings | New Search Fields

- **Search Buildings** has been enhanced to allow searching by *Current Month*, *Levy Year Start Date* and *Levy Year End Date*.

### Search | Improved Restrictions and Transparency

- Search functionality has been enhanced to support multiple conditions and includes a new advanced option, *Show description of search parameters* with tooltips to help users understand how search criteria are applied.

### DocMax | Second Debtor Support

- DocMax now supports linking Second Debtors to documents. The *Lot Details* field has been re-titled to *Lot or Debtor*, and new search columns have been added to improve document searching.

## StrataMax v5.6.152 Released 1st April 2026

### NSW Certificates | Legislation Changes

- From 1 April 2026, NSW information certificates have been updated in line with new legislation. These changes apply to **Certificate 184** under the *Strata Schemes Management Act 2015* and **Certificate 174** under the *Community Land Management Act 2021*.

### Certificates | Certificate Info Editor Additions

- Enhancements have been made to the *Info Editor* under *Configuration* on Report Distribution for both Certificate 184 and Certificate 174. Additional fields have been added to support accurate reporting on certificates.

### Certificates | Meeting Dates on Certificates

- Meeting date information will now be merged from the *Meeting Summary* module into certificates. Any additional details can be added through the *Info Editor* if required.

## StrataMax v5.6.151 Released 30th March 2026

## BCMax | Building Health Report

- A new **Building Health Report** is now available in *BCMax* and can be accessed by searching for *Building Health*. The report provides insight into building financial health, including new fields such as Term Deposit information and GST Registered status to assist with monitoring ATO GST thresholds.
- Buildings are highlighted in red where potential financial risk is identified based on bank balances and liabilities.
- The report can be customised, saved as a Saved Search, added to Dashboards, and exported to Excel. A new security permission has been added to control access.

## Search | Advanced Button Update

- The Advanced button has been removed from the top ribbon. Columns and Sort Order tabs are now available on the left under the *Restrict To* tab for improved usability.

## DocMax | Work Queue Action Buttons

- Work Queue action buttons can now be reordered using up and down arrows when the Work Queue is open in Edit mode.

## DocMax | Email Documents for Multiple Buildings

- *DocMax* now supports emailing documents for multiple buildings in a single action. Users can tag documents, select Email, and choose recipients from multiple buildings, including Internal Users, via the Email Compose screen.

## DocMax | Search Restrictions – Selection Controls

- Updated selection controls have been introduced in *DocMax* for several search restrictions, including Building Number, Account Codes, and selected Any / Not Any and Equal / Not Equal fields where lists are provided.

## ACT Rental Certificate | Info Editor Terminology

- *ACT Rental Certificate* wording has been updated to meet regulatory requirements for regulated swimming pools, with clearer terminology for pools built before 1 May 2023 and pools built or substantially altered after May 2023.

## Reports | Combined Address Title

- Reports such as *Ledger Cards* and *Merge Letters* will now use Address Title 1 for Roll accounts with multiple owners and split contacts, aligning behaviour with Levy Notices.

## General Improvements

This release includes a range of fixes and performance improvements across DocMax, searches, work queues, BAS preparation, report distribution, bank reconciliation, insurance schedules, and locked

building access.

## **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, with temporary unavailability of Cash Flow Summary and Balance Sheet options.

### **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 out, 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.