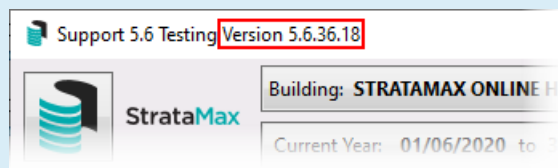


# StrataMax Release Notes

Last Modified on 08/09/2025 3:33 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.

## 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".

## 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.
-