

Task Management

Last Modified on 10/04/2025 3:03 pm AEST

This page contains information relating to the Task Management module being added to the StrataMax application. The Task Management module will provide team members with the tools to efficiently manage the varying tasks associated with strata management ensuring nothing is missed.

Some of the functions initially planned for the Task Management module include:

- Ability to create one off & recurring tasks
- Ability to create tasks specific to buildings & recurring office tasks
- Ability for tasks to be created based on data from StrataMax
- Assign tasks & / or view your tasks as an Account Manager or Assistant Account Manager
- Manage priority of tasks based on due dates & the priority field
- Create tasks from shortcut icons in various StrataMax interfaces such as Building Information, Office Bearers, Invoice Hub etc
- Link documents, files & URL links to tasks such as help pages, draft emails or company procedures
- Various task interfaces including list view, board view & search style
- Use Search Tasks to create reports based on any fields, date ranges & create dashboards for a quick overview

Screenshots & functions may vary as the project remains in development.

The screenshot shows a 'Task Details' window with the following fields and controls:

- Due Date:** A date picker set to 22/04/2025 with a calendar icon.
- Title:** A text field containing 'Finalise Reply RE: Plumbing'.
- Description:** A large, empty text area.
- Building:** A dropdown menu showing 'ABC Towers' and '5536', with a red 'X' icon to the right.
- State:** A dropdown menu set to 'Not Started'.
- Priority:** A dropdown menu set to 'Medium'.
- Assigned To:** A dropdown menu set to 'craig.jeffcoat'.
- Category:** A dropdown menu set to 'Maintenance'.
- Add Link:** A section with two input fields: 'Display Name' and 'Link', each followed by a green '+' icon.
- Add Note:** A text area followed by a green '+' icon.
- Links:** A section containing a link icon, the text 'Draft Email', and a red 'X' icon.
- Buttons:** At the bottom right, there are three buttons: 'Add Document', 'Save and Close', and 'Close'.

Task Management

Today

Tomorrow

This Week

Next Week

This Month

Clear

Custom Range

☒ Show completed in last 30 days

Assigned To

craig.jeffcoat

Show All

Building / Company Filter

All Buildings

Current Building

My Buildings (Account Manager)

Management Office

Office Tasks

Category Filter

Show All

Enter search term

Generate Levies	SP 8526 Keep	Medium	20 Mar 25	09 Apr 25	Complete	CJ
ABC Building - Arrange Plumber	SP 8526 Keep	Low	24 Mar 25	Overdue 17 days	InProgress	CJ
Whats been happening?	SP 8526 Keep	Medium	26 Mar 25	Overdue 15 days	InProgress	CJ
Review Draft Budget for Comment	SP 8526 Keep	Low	31 Mar 25	Overdue 10 days	InProgress	CJ
Term Deposit Maturity	SP 8526 Keep	High	04 Apr 25	Overdue 6 days	InProgress	CJ
Do something urgently please and thank you very much for that because you are awesome!	This is a very long build Keep	Medium	09 Apr 25	10 Apr 25	Complete	CJ
Review legislation changes planned		Medium	10 Apr 25	Overdue 6 days	NotStarted	CJ
Call back	SP 8526 Keep	Medium	14 Apr 25		InProgress	CJ
New User - Bob		Medium	14 Apr 25		NotStarted	CJ
ABC Towers Bank Setup	ABC Towers	Medium	14 Apr 25		NotStarted	CJ

View: List

Search

Categories

Schedules

Add Task

Mark Selected As Complete

Delete Selected

Close

Task Management

Today

Tomorrow

This Week

Next Week

This Month

Clear

Custom Range

☒ Show completed in last 30 days

Assigned To

craig.jeffcoat

Show All

Building / Company Filter

All Buildings

Current Building

My Buildings (Account Manager)

Management Office

Office Tasks

Category Filter

Show All

Kanban Options

Show All Columns

Enter search term

TO DO

Review legislation changes planned

Due: 10 Apr 25

0 days overdue !!

Medium

Review quarterly financial statements

Due: 10 Apr 25

0 days overdue !!

High

Schedule annual fire inspection

Due: 12 Apr 25

Medium

New User - Bob

Due: 14 Apr 25

Medium

Update committee contact list

Due: 14 Apr 25

Low

ABC Towers Bank Setup

Due: 14 Apr 25

Medium

Laulene

Due: 14 Apr 25

Medium

Arrange pest control service

Due: 17 Apr 25

Medium

IN PROGRESS

Solar panel installation

Due: 21 Feb 25

48 days overdue !!

High

Convert tennis court to pickleball

Due: 08 Mar 25

33 days overdue !!

Medium

Electric vehicle charging stations

Due: 18 Mar 25

23 days overdue !!

Medium

Arrears Run

Due: 22 Mar 25

19 days overdue !!

Medium

Pool area WiFi installation

Due: 23 Mar 25

18 days overdue !!

Low

ABC Building - Arrange Plumber

Due: 24 Mar 25

17 days overdue !!

Low

Whats been happening?

Due: 26 Mar 25

15 days overdue !!

Medium

Call back Agent

Due: 28 Mar 25

13 days overdue !!

Low

COMPLETED

Generate Levies

Completed: 09 Apr 25

Medium

Do something urgently please and thank you very much for that because you are awesome!

Completed: 10 Apr 25

Medium

View: Kanban

Search

Categories

Schedules

Add Task

Mark Selected As Complete

Delete Selected

Close

Recurring Office Tasks will automatically be created based on start and end dates and frequency. These style of tasks will help ensure no recurring processes are missed; instructions & help links can be included in the task description to assist users.

Scheduled Tasks

Monthly Levy Run (Next: Mar 28)

Arrears Run (Next: Mar 21)

Finalise BAS (Next: Apr 01)

Add Schedule

Delete

Schedule Configuration

Basic Information

Schedule Name:Monthly Levy Run

Description:Generate & Issue levy notices.

☒ Enabled

Schedule Settings

Frequency:Monthly

Start Date:28/03/202515

End Date:20/03/205015

Skip Weekends:☒

Task Template

Task Title:Generate Levies

Description:Generate levies
<https://smhelp.stratamax.com/help/global-levy-generation>

Priority:Medium

Assign To:craig.jeffcoat

Category:Internal Procedure

Days Due After Creation:2

Save

Close