

Task Management

Last Modified on 22/05/2025 1:05 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 have tasks created automatically based on StrataMax data
- 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 displays the 'Task Details' window, which is divided into several sections. On the left, there is a form for task information: 'Due Date' is set to 30/04/2025; 'Title' is 'Arrange pest control service'; 'Description' is 'Schedule routine pest control for common areas'; 'Building' is 'SP 8526 Keep 8526'; 'State' is 'Not Started'; 'Priority' is 'Medium'; 'Assigned To' is 'Users'; 'Category' is 'Maintenance'; and 'Add Link' has fields for 'URL' and 'Name'. Below this is a 'Documents' section with a 'Links' tab. On the right, there is a 'Checklist' section with a progress bar showing '1 / 2 completed'. It contains two items: 'Confirm with committee who last completed it & ask for report' (unchecked) and 'Check handover records to see if any old reports available' (checked). Below the checklist is a 'Notes' section with a text area and an 'Add' button. At the bottom right, there is a note: 'Have emailed committee requesting past information.' The window has standard window controls (minimize, maximize, close) at the top right and buttons for 'Add Document', 'Save and Close', and 'Close' at the bottom right.

Date Filter

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 0 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

Date Filter

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

CJ

Review quarterly financial statements

Due: 10 Apr 25

0 days overdue !!

High

Users

Schedule annual fire inspection

Due: 12 Apr 25

Medium

Users

New User - Bob

Due: 14 Apr 25

Medium

CJ

Update committee contact list

Due: 14 Apr 25

Low

Users

ABC Towers Bank Setup

Due: 14 Apr 25

Medium

CJ

Laulene

Due: 14 Apr 25

Medium

dboorn

Arrange pest control service

Due: 17 Apr 25

Medium

Users

IN PROGRESS

Solar panel installation

Due: 21 Feb 25

48 days overdue !!

High

Users

Convert tennis court to pickleball

Due: 08 Mar 25

33 days overdue !!

Medium

Users

Electric vehicle charging stations

Due: 18 Mar 25

23 days overdue !!

Medium

Users

Arrears Run

Due: 22 Mar 25

19 days overdue !!

Medium

Users

Pool area WiFi installation

Due: 23 Mar 25

18 days overdue !!

Low

Users

ABC Building - Arrange Plumber

Due: 24 Mar 25

17 days overdue !!

Low

CJ

Whats been happening?

Due: 26 Mar 25

15 days overdue !!

Medium

CJ

Call back Agent

Due: 28 Mar 25

13 days overdue !!

Low

dboorn

COMPLETED

Generate Levies

Completed: 09 Apr 25

Medium

CJ

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

This is a very long build Keep

Completed: 10 Apr 25

Medium

CJ

View: Kanban

Search

Categories

Schedules

Add Task

Mark Selected As Complete

Delete Selected

Close

Task Management

Enter search term

Tasks found: 17

Feedback

Today

Tomorrow

This Week

Next Week

This Month

Clear

Custom Range

Show completed in last 30 days

Assigned To

Show All

Me And My Groups

Specific Assignment

craig.jeffcoat

Building / Company Filter

All Buildings

Current Building

My Buildings (Account Manager)

Office Tasks

Category Filter

Show All

Calendar Options

Show Weekends

Month View

Week View

May 2025

Monday

Tuesday

Wednesday

Thursday

Friday

28

29

30

1

2

5

6

7

8

9

12

13

14

15

16

19

20

21

22

23

26

27

28

29

30

View

Calendar

Search

Categories

Schedules

Generate Auto Tasks

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.

Event tasks can be setup to automatically be created based on data from within StrataMax such as Financial Year dates, Insurance dates, Contract dates, Inspections and Work Orders etc.

Scheduled Tasks

Available Schedules

Monthly Levy Run (Next: Jun. 08)

Arrears Run (Next: May 03)

Finalise BAS (Next: Aug. 02)

AGM - Arrange financial audit (Next: May 02)

Run Levies (Next: May 16)

Issue levies - LK Task (Next: Jul. 15)

Management Fees (Next: Jun. 02)

Automatic Events

Insurance Expiry

Next AGM

Schedule Configuration

Basic Information

Enabled

Schedule Name: Monthly Levy Run

Description: Generate & Issue levy notices.

Schedule Settings

Frequency: Monthly

Start Date: 2/5/2025

End Date: 2/5/2029

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

Task Checklist Template

Managers - note exceptions

Check for outstanding Minutes

Add Event

Add Schedule

Delete

Save

Close

