

Task Management

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This article covers an overview of the Task Management interface and the various options, functions, and buttons available. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

The Task Management screen provides users with the tools to efficiently manage the varying tasks associated with strata management, ensuring nothing is missed. Tasks can be associated with a building; where not associated to a building the task is considered an office task.

Task Management | Task Details Overview

This section provides an explanation of fields & functions available in the Task Details window, which appears when the user creates a new task or opens an existing task.

1. Due Date: The date the task is due.
2. Title: Used to identify the task name, and is also used by the search field in the main Task Management screen.
3. Description: Additional text to provide a more detailed explanation of the task, and is also used by the search field in the main Task Management screen.
4. Building: The building the task relates to. If it's left blank, the task is considered an office task. This is also used by the search field in the main Task Management screen. Remove the building selection by clicking the red X.
5. State: A drop-down menu to help manage the various states of a task. Available for selection are Not Started, In Progress, Blocked, Abandoned and Complete. The state of a task can be updated manually or by drag and dropping a task to a different column in the Kanban view.
6. Priority: A pick-list to assist with managing the urgency of a task. Available for select are Low, Medium and High.
7. Assigned To: A pick-list of users & user groups from StrataMax security. Tasks can be reassigned whenever required.
8. Category: A pick-list that can be managed via the Categories button to assist in grouping tasks such as Maintenance, Correspondence, Procedures.

9. Add Link: URL & file links can be added to provide quick access to information, procedures etc. Multiple links can be added along with a name for easy identification. To add a link, type or paste the website URL or the file path into the URL field, then type a name, and click the green plus button. Once added, any links will appear in the *Links* tab where they can be clicked to open them.
10. Documents / Add Document: The Documents tab will display any documents that have been added to this task. Open the document by clicking the icon to the left of the name. To remove the document from this task, click the red X button to the right of the name. To add documents, click the *Add Document* button in the bottom right of the Task Details window and locate the document from the *DocMax* Select Document window.
11. Checklist: For tasks that may require multiple action points, items can be added to the checklist and marked completed individually. Once all items in a checklist are marked as complete; the task state will update to Complete also.
 - Checklist items cannot be edited, so if there is a typo or mistake, the checklist item needs to be deleted by clicking the red X and then added as a new checklist item.
12. Notes: Notes can be added to a task to help capture important information throughout its life cycle. These will present with a date and username on them.
 - Notes cannot be edited, so if there is a typo or mistake, the note needs to be deleted by clicking the red X and then added as a new Note.
13. Save and Close: Click to save the new task or any changes and close the Task Details window.
14. Close: Click to close the Task Details window without saving.

The screenshot shows the 'Task Details' window with the following elements and callouts:

- 1**: Due Date field (16/07/2025)
- 2**: Title field (This is the title)
- 3**: Description field (This is the description)
- 4**: Building dropdown menu (LK Task KEEP 154112)
- 5**: State dropdown menu (In Progress)
- 6**: Priority dropdown menu (Medium)
- 7**: Assigned To dropdown menu (Users)
- 8**: Category dropdown menu (Maintenance)
- 9**: Add Link section with URL and Name fields and a plus button
- 10**: Documents tab showing 'Case Manager' with a red X delete button
- 11**: Checklist section with an 'Add' button
- 12**: Notes section with an 'Add' button
- 13**: 'Save and Close' button
- 14**: 'Close' button

Task Management | Buttons

View:

- *View* is used to select the preferred view; Kanban, List, or Calendar.
- *Search* opens the Search Tasks screen.
- *Categories* opens the Task Category Management window to manage categories that can be set within a task. The delete icon will only be available if a category has not been used. Refer to the Categories section below for further information.
- *Schedules* opens the Scheduled Tasks window where scheduled and event tasks are managed. Refer to the Scheduled & Event Tasks section below for further information.
- *Add Task* creates a new task.
- *Mark Selected as Complete* can be clicked when a single or multiple tasks have been selected and need to be completed.
- *Delete Selected* can be clicked when a single or multiple tasks have been selected and need to be deleted.
- *Close* closes Task Management.

Create a New Task

To create a new task follow the below steps:

1. Open **Task Management**.
2. Click on the *Add Task* button.
3. When in Calendar view, the user can double click within a date to create a new task, or open an existing task.
4. Enter any information required in the task (see the Task Details Overview section above for an explanation of the various settings and fields).
5. Click *Save and Close*.

Edit/Update a Task

This section describes how to edit / update a task. A task can also have the state updated by drag and dropping it to a different column in the Kanban view.

1. Open **Task Management**.
2. Locate the required task and double click to open it.
3. Update information as required (see the Task Details Overview section above for an explanation of the various settings and fields).

4. Click *Save and Close*.

Delete a Task

This section describes how to delete a task, which cannot be undone.

1. Open **Task Management**.
2. Locate and select the required task.
3. Click the *Delete Selected* button.

Task Management | Logs

When a task is created, deleted, or when any of the following fields are updated, details will be recorded in *Log Viewer* under the category of 'Tasks'.

- State
- Assigned to
- Due Date
- Priority
- Notes

The screenshot shows the 'Search Logs' window with the following search criteria:

- Field: Date/Time
- Condition: is on or after
- Value: Yesterday
- Field: Category
- Condition: is equal to
- Value: Tasks
- Field: Username
- Condition: is equal to
- Value: (empty)

31 records displayed

Date/Time	Log Level	Username	Description	Building	Category
09/07/2025 1:07:16 PM	Info	tristan.collins	Task 620 'This is the title' updated: State changed from 'NotStarted' to 'InProgress' Assignment changed from 'tristan.collins' to 'Users' Building changed from 'None' to '154112' Category changed from 'None' to 'Maintenance'		Tasks
09/07/2025 12:54:37 PM	Info	tristan.collins	Added link www.stratamax.com to task This is the title		Tasks
09/07/2025 12:54:18 PM	Info	tristan.collins	Added document 17 to task This is the title		Tasks
09/07/2025 12:53:58 PM	Info	tristan.collins	Added note Note 2 to task This is the title		Tasks
09/07/2025 12:53:54 PM	Info	tristan.collins	Added note Note 1 to task This is the title		Tasks

Task Management | Interface

There are three views available in the Task Management screen, and there is also the **Search Tasks** screen, which can be used to access all tasks, report / export tasks, and create **Dashboard** items, etc.

Each user can set their desired default view in the *Configuration* window.

List View

By default, the list view displays tasks in *Due Date* order and can be changed by clicking on the column headers. To open a task, simply double-click it. The percentage number in the Progress column observes the Checklist items within the task. A search bar is available above the list and will search the task Title, Description, and Building.

Task Management

Enter search term Tasks found: 49

Title	Building	Priority	Due Date	Completed Date	State	Assigned To	Progress
New Task		Medium			NotStarted	CJ	
Electric vehicle charging stations	SP 8526 Keep	Medium	18 Mar. 25 45 days		InProgress	Users	
Generate Levies	SP 8526 Keep	Medium	20 Mar. 25 43 days		Complete	CJ	
Arrears Run	SP 8526 Keep	Medium	22 Mar. 25 41 days		Abandoned	Users	
Pool area WiFi installation	SP 8526 Keep	Low	23 Mar. 25 40 days		InProgress	Users	
ABC Building - Arrange Plumber	SP 8526 Keep	Low	24 Mar. 25 39 days		Abandoned	CJ	
Call back Agent	SP 8526 Keep	Low	28 Mar. 25 35 days		Abandoned	dborn	
test	SP 8526 Keep	Medium	28 Mar. 25 35 days		Abandoned	dborn	0%
Confirm No Committee Catch Up	SP 8526 Keep	High	28 Mar. 25 35 days		InProgress	PB	
Review Draft Budget for Comment	SP 8526 Keep	Low	31 Mar. 25 32 days		InProgress	CJ	
Replace security cameras	SP 8526 Keep	Medium	01 Apr. 25 31 days		InProgress	Users	
Review Quotes for Fence	SP 8526 Keep	Medium	09 Apr. 25 23 days		Blocked	dborn	
Renee	SP 8526 Keep	Medium	09 Apr. 25 23 days		Blocked	RS	
Must get done today.	SP 8526 Keep	High	10 Apr. 25 22 days		NotStarted	dborn	0%
Review legislation changes planned	SP 8526 Keep	Medium	10 Apr. 25 22 days		InProgress	CJ	75%
Review quarterly financial statements	SP 8526 Keep	High	10 Apr. 25 22 days		NotStarted	Users	
Schedule annual fire inspection	SP 8526 Keep	Medium	12 Apr. 25 20 days		NotStarted	Users	
A B C D E	SP 8526 Keep	Medium	14 Apr. 25 18 days		InProgress	PB	
Update committee contact list	SP 8526 Keep	Low	14 Apr. 25 18 days		NotStarted	Users	
Laulene	SP 8526 Keep	High	14 Apr. 25 18 days		InProgress	dborn	
Renee Task - Testing Meeting	SP 8526 Keep	Low	15 Apr. 25 17 days		NotStarted	RS	
Update building insurance policy	SP 8526 Keep	High	15 Apr. 25 17 days		Abandoned	Users	
Generate Levies	SP 8526 Keep	Medium	17 Apr. 25 15 days		NotStarted	TC	
Repaint parking lot lines	SP 8526 Keep	Medium	19 Apr. 25 13 days		InProgress	Users	
Renovate lobby entrance	SP 8526 Keep	High	21 Apr. 25 11 days		InProgress	Users	
Committee Meeting - 1/5/25	SP 8526 Keep	Low	22 Apr. 25 10 days		NotStarted	NS	
Replace elevator control system	SP 8526 Keep	High	22 Apr. 25 10 days		Blocked	Users	

View: List | Search | Categories | Schedules | Add Task | Mark Selected As Complete | Delete Selected | Close

Kanban View

The kanban view displays tasks in columns based on the state field. Additional columns of Abandoned and Blocked can be included if the setting is ticked within the view or in configuration. Tasks can be dragged from one column to another which will update the state of the task based on where it is dropped, and to open a task double click on it. A search bar is available above the list and will search the task Title, Description, and Building.

Task Management

Enter search term Tasks found: 4

Column	Task Title	Priority	Due Date	Overdue
IN PROGRESS (2)	Review Draft Budget for Comment	Low	Due: 31 Mar. 25	32 days overdue !!
	Review legislation changes planned	Medium	Due: 10 Apr. 25	22 days overdue !!
COMPLETED (1)	Generate Levies	Medium	Completed	

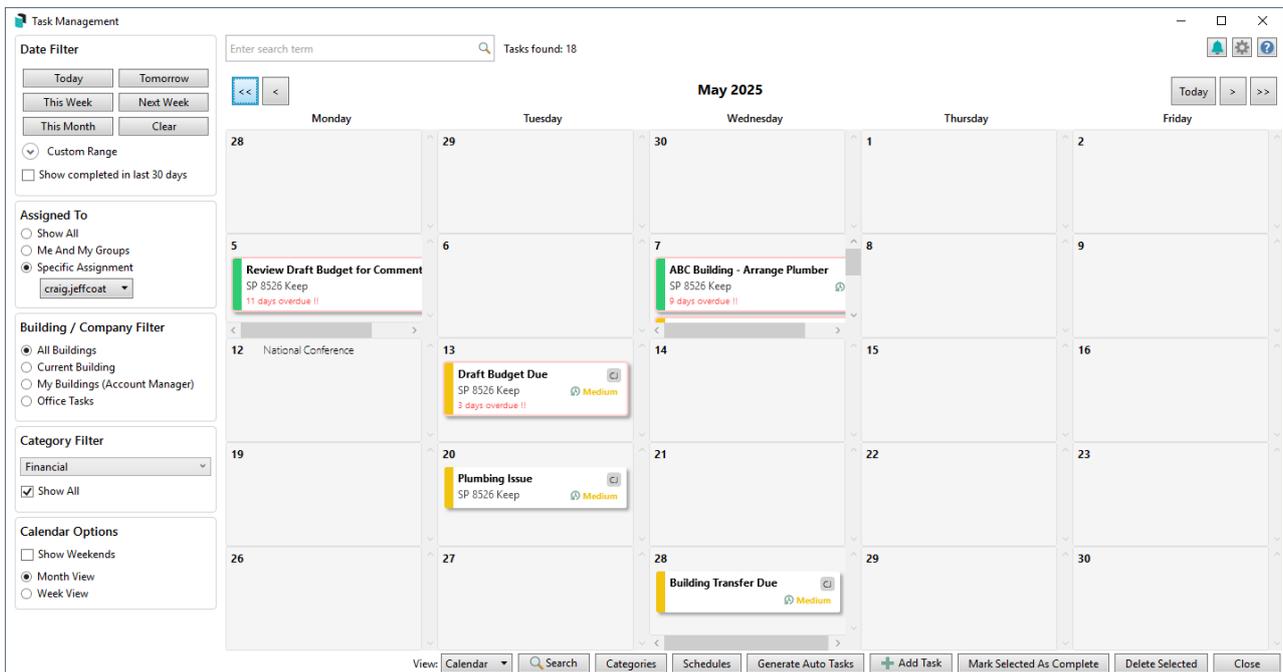
View: Kanban | Search | Categories | Schedules | Add Task | Mark Selected As Complete | Delete Selected | Close

Calendar View

The calendar view allows users to see tasks within a monthly or weekly view, with additional configuration available to show / hide weekends. A search bar is available above the list and will search

the task Title, Description, and Building.

When in Calendar view, the user can double click within a date to create a new task, or open an existing task.



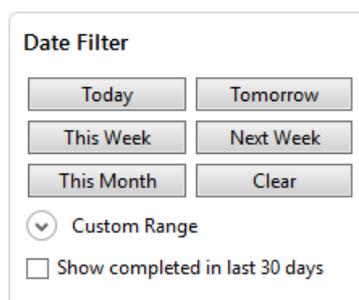
Task Management | Filters

The filters available in Task Management remain the same regardless of whether using the Kanban, List or Calendar views. The filters are used to manage what tasks will display.

Date Filter

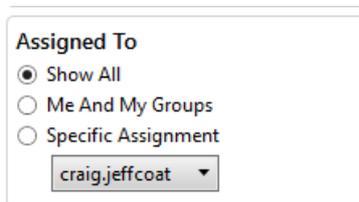
By default no date filters are automatically applied. To limit tasks displayed, select from the quick date filters or set a custom date range.

Tick *Show completed in last XX days* to include completed tasks within the set number of days. The number of days displayed in this setting is based on the number set in the [Configuration](#). Tasks that have been completed will show with a line through them.



Assigned To

By default the assigned is set to your username. Select either other users or user groups to view tasks assigned to them. To view tasks assigned to all users & user groups tick *Show All*. To view tasks assigned to your username or security groups you are a member of, select *Me and my groups*.

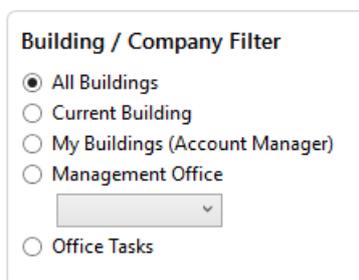


The 'Assigned To' filter form contains three radio button options: 'Show All' (selected), 'Me And My Groups', and 'Specific Assignment'. Below these options is a dropdown menu with the text 'craig.jeffcoat' and a downward arrow.

Building / Company Filter

By default *All Buildings* is set when opening Task Management, but other filters can be selected.

- All Buildings will display tasks for all active buildings.
- Current Building will display tasks for the currently selected building.
- My Buildings (Account Manager) will display for the users buildings where they are set as the Account Manager. The user name must be linked to the Account Manager in [Account Manager Edit](#).
- Management Office can be selected if the [Management Office](#) function is being used in StrataMax. Once ticked, select the required Management Office to view the tasks for the buildings associated with the selected Management Office.
- Office Tasks can be ticked to display Office Tasks, that are not associated with a building.



The 'Building / Company Filter' form contains five radio button options: 'All Buildings' (selected), 'Current Building', 'My Buildings (Account Manager)', 'Management Office', and 'Office Tasks'. Below the 'Management Office' option is a dropdown menu with a downward arrow.

Category Filter

By default no category is selected. To filter by a specific category, untick *Show All* and select the required category.

Category Filter

Show All

Kanban Options (only displayed in Kanban view)

Tick *Show All Columns* to include any tasks with the state of Abandoned and Blocked.

Kanban Options

Show All Columns

Calendar Options (only displayed in Calendar view)

- Show Weekends can be ticked to display weekend days within the calendar.
- Month View and Week View can be selected to view the calendar as either monthly or weekly.

Calendar Options

Show Weekends

Month View

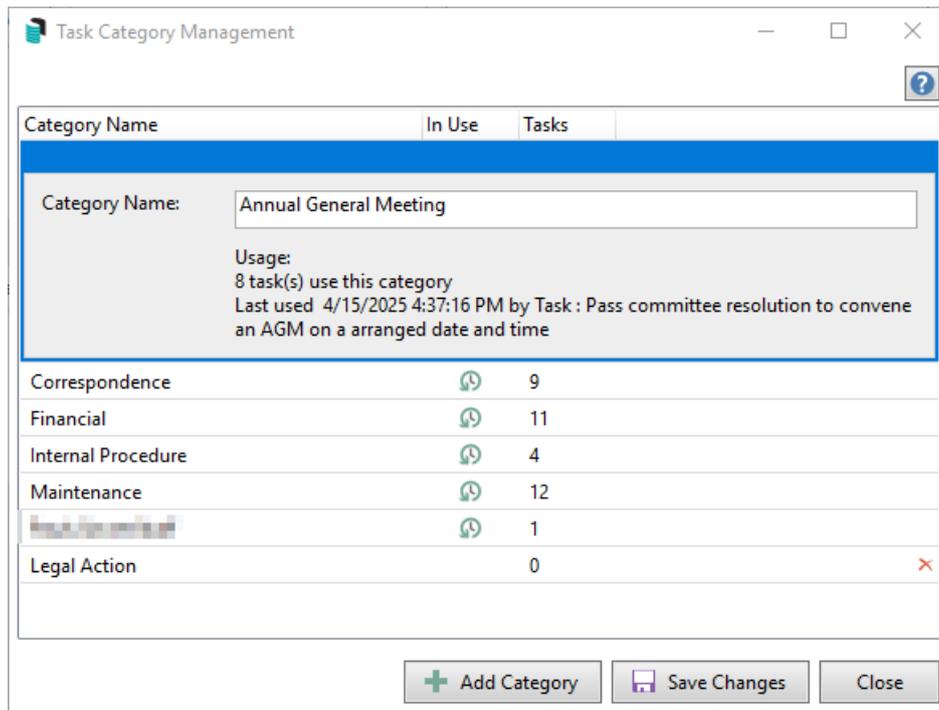
Week View

Categories

Categories can be assigned to tasks to assist with grouping them, whether it be via filters, searching, reports, or [Dashboard](#) items.

- To add a new category, select *Add Category*.
- To edit a category, change the Category Name and select Save Changes.

Categories are not able to be deleted if they have been used for a task.



Scheduled Tasks

Scheduled tasks can be used to automatically create recurring tasks not associated with a building. A task created based on scheduled tasks is considered an *Office Task*, unless a building is assigned after its creation.

Once a schedule has been created in **Task Management**, the tasks for that schedule will be generated automatically on a daily basis. This automation is based on a backend system that is managed by the StrataMax Support team and cannot be altered by users.

Add a New Schedule Task

To add a new schedule, follow the below steps:

1. Search or select **Task Management**.
2. Click the *Schedules* button (bottom right) to open the Scheduled Tasks window.
3. Click the *Add Schedule* button in the bottom right.
4. Enter the basic information related to the schedule. This information is not included within tasks created.
 - To disable a schedule if it's no longer required, remove the tick in the *Enabled* box.
5. Set up the Task Template; the task template will be used for tasks automatically created based on the schedule:
 - Set the required task title.
 - Use the description to include any additional information that may be required include help links for procedures etc.

- Set the priority of the task.
- Select the user or user group the tasks will be assigned to.
- Set the required category if applicable.
- Set the Notice Period Before Due; this will be used to calculate and populate the due date field within tasks automatically created based on the schedule.

6. In the Schedule Settings section:

- Select the required frequency.
- Set the required start date. Note that this is the date when the backend scheduler will create the first task. i.e. the first task won't be created until this date rolls over. So, if this date is six months in the future from today's date, then that is the day the tasks will be created and appear in the **Task Management** screen.
- Set the required end date if required, no further tasks will be created after this date.
- Tick skip weekends if required (tasks will be set to the next Monday where they fall on weekends).
- Days Due After Creation: This determines when the task is due. So, if the *Frequency* is set to 'Monthly', and the *Start Date* is '01/01/2025' and the *Days Due...* is '14' then the due date for each of the tasks will be on the 14th of each month.

7. In the Task Checklist Template section (top right), add any checklist items that are required on the tasks by typing the details and clicking the *Add* button. If a mistake or typo is made, the checklist item needs to be deleted and a new one created. Click the up or down arrows to change the order of the checklist items, and click the red X to delete a checklist item.

The screenshot shows a software window titled "Scheduled Tasks" with a search bar and a list of available task automation options. The "Monthly Levy Run" task is selected. The configuration panel is divided into three sections: Basic Information, Task Template, and Schedule Settings. The Task Checklist Template section on the right shows two items: "Managers - note exceptions" and "Check for outstanding Minutes".

Section	Field	Value
Basic Information	Enabled	<input checked="" type="checkbox"/>
	Schedule Name	Monthly Levy Run
Task Template	Task Title	Generate Levies
	Description	Generate levies https://smhelp.stratamax.com/help/global-levy-generation
Schedule Settings	Frequency	Monthly
	Start Date	2/5/2025
	End Date	Select a date
	Skip Weekends	<input checked="" type="checkbox"/>
Notice period before due		2

Task Checklist Template:

- Managers - note exceptions
- Check for outstanding Minutes

Buttons at the bottom: Add Event, Add Schedule, Delete, Save, Close.

Edit a Schedule Task

To edit a schedule setup follow the below steps. This will not change any tasks that have already been created.

1. Select **Task Management**.
2. Click on *Schedules*.
3. Select from *Available Task Automation* list.
4. Make any required changes.
5. Click on *Save*.

Delete a Schedule Task

To delete a schedule setup follow the below steps. This will stop any further Tasks being created based on the setup. It will not delete any Tasks already created.

1. Select **Task Management**.
2. Click on *Schedules*.
3. Select from *Available Task Automation* list.
4. Click on *Delete*.

Event Tasks (Automation)

Event Tasks observe various areas in StrataMax and once they have been set up (and enabled), they are created for the upcoming dates based on the setting 'Months to look ahead' for all buildings.

An event date can have multiple tasks automatically being created if required. Event Types that are currently available for selection include:

Task Management Event Type	Area	Data Source
<i>Building Transfer In</i>	<i>Transfer In/Out</i>	Earliest Date of Transfer. This also contains a default checklist for common tasks that are recommended to be completed.
Building Valuation	Inspections	Default Inspection Type - Building Valuation
Building Year End	Building Information	Financial Year End
Contract Expiry	Contracts Register	Expiry Date
Contract Increase Due	Contracts Register	Increase Due
Contract Next Option Due	Contracts Register	Next Option Renewal Date
Emergency Lighting Inspection	Inspections	Default Inspection Type - Emergency Lighting (Next Planned field)
Fire Safety Inspection	Inspections	Default Inspection Type - Fire Safety Report (Next Planned field)
First AGM	Building Information	Meeting Type - First Annual General Meeting
Health and Safety Inspection	Inspections	Default Inspection Type - Workplace H & S (Next Planned field)
Insurance Due	Insurance	Building Type - Due Date
Insurance Valuation	Inspections	Default Inspection Type - Insurance Valuation (Next Planned field)
Levy Year End	Building Information (New Building screen)	Levy Year/AGM
Lift Registration Due	Inspections	Default Inspections Type - Lift Registration (Next Planned field)
Next AGM	Building Information	Meeting Type - Annual General Meeting
Next General Meeting	Building Information	Meeting Type - General Meetings

Next Sinking Fund Report Due	Inspections	Default Inspection Type - Sinking Fund Report (Next Planned field)
Termite Inspection	Inspections	Default Inspection Type - Termite (Next Planned field)
Unfinished Work Order	TaskMax	Description: Contractor and Finish Date; Due Date is the Notice Before Due; Title: Work Order Subject

For more details on default inspection types and their applications, refer to the [Inspections](#) article.

Add a New Event Task

Follow the below steps to setup event tasks.

1. Select ***Task Management***.
2. Click on *Schedules*.
3. Click on *Add Event*.
4. Enter the basic information related to the schedule. This information is not included within tasks created.
 - To disable an event task if no longer required untick *Enabled*.
5. Setup the *Task Template*, the task template will be used for tasks automatically created based on the event dates.
 - Type the required *Task Title*.
 - Use the *Description* to include any additional information that may be required to include help links for procedures etc.
6. Set the *Priority* of the task.
7. Select the user or user group for the Task in the *Assigned To* drop-down menu.
8. Select the required *Category* if applicable.
9. Under the *Event Settings* section, select the *Event Type* from the list of available events.
10. Set the *Notice period before due*, this will be used to calculate and populate the due date field within tasks automatically. Use a minus if task due date needs to be after the event date.
11. Add any checklist items that are required on the tasks.
12. Select *Save*.

The screenshot shows the 'Scheduled Tasks' application window. It is divided into three main sections: 'Available Task Automation', 'Event Configuration', and 'Task Checklist Template'.

- Available Task Automation:** A list of tasks with a search bar. The 'Insurance Due' task is selected and highlighted in blue. Other tasks include 'AGM - Arrange financial audit (Next: May 02)', 'Arrears Run (Next: May 03)', 'Finalise BAS (Next: Aug. 02)', 'Insurance Due in 7 Days', 'Issue levies - LK Task (Next: Jul. 15)', 'Management Fees (Next: Jun. 02)', 'Monthly Levy Run (Next: May 17)', 'New LeviesDue', 'New Schedule (Next: May 16)', 'Run Levies (Next: May 16)', and 'Unfinished Work Orders'.
- Event Configuration:**
 - Basic Information:** 'Enabled' is checked. 'Schedule Name' is 'Insurance Due'. 'Description' is empty.
 - Task Template:** 'Task Title' is 'Insurance Due'. 'Description' is 'Insurance is due in 7 days'. 'Priority' is 'Medium'. 'Assign To' is 'craig.jeffcoat'. 'Category' is 'Maintenance'.
 - Event Settings:** 'Event Type' is 'Insurance Due'. 'Notice period before due' is '7'.
- Task Checklist Template:** A list of checklist items: 'Quotes have been received' and 'Committee have details'. Each item has up/down arrows and a delete 'X' icon. An 'Add' button is at the top right.

At the bottom of the window are buttons for 'Add Event', 'Add Schedule', 'Delete', 'Save', and 'Close'.

Edit an Event Task

These steps are for editing an event task setup. This will not change any tasks that have already been created:

1. Select **Task Management**.
2. Click on *Schedules*.
3. Select from *Available Task Automation* list.
4. Make any required changes.
5. Click on *Save*.

Delete an Event Task

These steps are for deleting an event task setup. This will stop any further tasks being created based on the setup. It will not delete any tasks already created:

1. Select **Task Management**.
2. Click on *Schedules*.
3. Select from *Available Task Automation* list.
4. Click on *Delete*.

Quick Tasks

Shortcut icons used to create a task are available from the below areas of StrataMax; these are intended to allow for quick creation of a task without the need to navigate to Task Management.

- Building Information.
- DocMax (a saved document).
- Bank Account Setup.
- Office Bearers.
- Invoice Hub / Review Invoices.
- Bank Rec.
- Building Transfers.

Building Information - SP 8526 Keep 8526

View: All Fields Search

Building Registration

Status: Active Mark as Inactive Mark as Lost ☆

State, Legislation & Type: State: NSW ☆
Type: Strata Plan (S.P.) ☆
Regulatory Module: Strata Schemes Management Act 2015 ☆

Body Corporate Name: SP 8526 Keep ☆

Building Long Name: ☆

Address: ☆

Australian Business Number (ABN): Branch: ☆

Building Short Name: ☆

Plan Number: 8526 ☆

CTS Number: ☆

Date of Registration of Plan: 01/08/2024 ☆

Property Type: ☆

Registered Address: ☆

Notes History Report Save Close