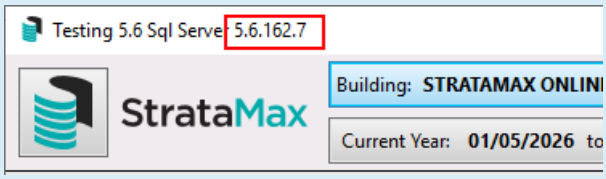
StrataMax Release Notes

Last Modified on 19/11/2026 1:06 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.



Preview Feature Versions

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* who will help coordinate timing.

- Creditor Invoices Refresh [v5.6.154]
- Levy Arrears to Report Distribution [5.6.157]
- Debtor Invoice Refresh [v5.6.161]

StrataMax v5.6.167 Released 19th November 2026

Building Information | Access Information

- A new Access Information field has been added to the Structural section of Building Information. This field provides a dedicated area for recording detailed building access instructions and supports up to 3,500 characters.
- Access Information is also available within the Managers Portal.

Building Information | Search Building Enhancements

- Access Information is now available as a field within Search Buildings.
- When included in a search, the information entered against the building can be displayed in search results, printed, and exported.
- Long text entries will automatically wrap within search results, making detailed information easier to read.
- Saved search configurations containing Access Information can also be displayed on the Dashboard.

Building Information | Additional Information Improvements

- The following Building Information fields have been enhanced to support up to 3,500 characters:
  - Basis for Setting Entitlements
  - Payment Authority Conditions
- Both fields now include an expandable entry area, making it easier to enter and review detailed information.
- Search Buildings has also been updated to support and return the additional information entered into these fields.

StrataMax v5.6.166 □ Released 5th November 2026

Invoice Printing (Debtor Invoices) | Report Period Enhancements

- Enhancements have been made to Invoice Printing when using ***Debtor Invoices***. When the Report Period is set to 'Month to Date', the configuration summary will now display 'Period: MTD'. In addition, the Report Period setting is now user-specific to prevent changes impacting other users'settings.

Owners Tax Report | Scheduled Debtor Invoices

- Charges raised from an Owners Tax Report will now be created as a ***Scheduled Debtor Invoice*** rather than a Standing Journal. These scheduled invoices can be viewed and edited in Scheduled Debtor Invoices, with transactions generated when the scheduled invoice is processed. For account group buildings, the fee will automatically post to the first account group the owner belongs to.

Inspections and Task Management | New Default Inspection Types

- New default Inspection Types have been added to Inspections and ***Task Management*** Event Automation, including Pool Safety, Gates and Gutter Cleaning. These new options can be used when creating inspection types and task automation events.

Ledger Card | User-Specific Configuration

- The ***Ledger Card*** style configuration setting is now user-specific, preventing one user's preference

from altering settings for other users. A tooltip has also been added to indicate that the setting only applies to the current username.

Creditor Invoices | Prompt and Preferred Settings

- **Creditor Maintenance** has been enhanced with a new Prompt field that allows important processing instructions to be recorded and displayed during Creditor Invoice entry. Prompts can be configured at Master Chart level or as building-specific overrides, ensuring users receive relevant instructions when processing invoices. Search Creditors has also been enhanced to include Prompt information for reporting purposes.

Business Activity Statement | Validation Enhancements

- Validation improvements have been made to the ***BAS*** module to better manage transactions where previous financial years are locked or audited. Additional validation has been introduced for PAYG instalments to ensure transactions can only be posted to valid BAS periods, with clear messaging displayed when posting is not permitted.

API | Applicants Endpoint

- A new API endpoint, */api/master-chart/applicants*, has been added to provide applicant information including Account Code, Description, Contact ID, Comments and Business Category. Where an applicant has multiple contacts, separate records will be returned for each contact.

Creditor and Debtor Invoices | Removal of Legacy Invoice Interface

- The transition to the updated Creditor and Debtor Invoice functionality is now complete. Legacy invoice entry screens, preview options, configuration settings and related security permissions have been removed, providing a more streamlined and consistent invoicing experience.

Creditor and Debtor Invoices | Simplified Configuration

- Configuration options that only applied to legacy invoice functionality have been removed from both Creditor and Debtor Invoices, reducing complexity and ensuring configuration settings align with the current invoice process.

Creditor Invoices | BPAY CRN Handling

- Enhancements have been made to BPAY CRN handling for creditors where the reference number differs on each bill. When enabled, the creditor's stored CRN will no longer automatically populate during invoice entry, helping prevent incorrect references being reused. The same behaviour also applies to Scheduled Creditor Invoices.

Creditor Maintenance | BPAY Tooltip

- A new tooltip has been added to the "BPAY CRN is different on each bill" setting in ***Creditor***

Maintenance to provide additional guidance when configuring BPAY details.

StrataMax 5.6.165 Released 15th October 2026

Search Office Bearers | Office Held Search Enhancements

- Enhancements have been made to ***Search Office Bearers*** to improve Office Held filtering options. New search conditions *Is Any Of* and *Is Not Any Of* have been added to allow users to search against multiple office holder values. Existing conditions *Is Equal To* and *Is Not Equal To* have also been enhanced with selection lists, making office bearer searches easier and more efficient.

Account Summary Setup | Import from File Enhancement

- A new import function has been added to Account Summary Setup, allowing configuration data to be imported directly from .xlsx and .csv files. This enhancement simplifies the transfer and maintenance of Global and Building Override configurations, reducing manual setup and improving consistency across Financial Account Summary, Balance Sheet, Cash Flow Summary, and Expense Summary reporting categories.

Levy Arrears | Due Date Words

- Levy Arrears has been enhanced to allow custom Due Date Words for StrataPay deposit slips. Users can configure alternate text that will display in place of the due date, providing greater flexibility when producing arrears notices.

Levy Arrears | Other and Overdue Breakup

- A new *ledgercard_due* template has been introduced for Arrears Notices. The template provides an itemised breakdown of both Other Arrears and Overdue Amounts, improving transparency and making outstanding balances easier to understand. The template can also be run directly from Ledger Card.

DocMax | System Categories

- Selected ***DocMax*** system categories can now be renamed directly within ***DocMax***, providing greater flexibility in document management. Existing protections remain in place to prevent duplicate category names and these categories cannot be merged or deleted.

Ledger Card | Style Enhancements

- New Ledger Card Style Selector options have been added:
  - **Old Year** produces historical transactions only.
  - **Debits Only** produces current year debit transactions only.

Levy Register | Excel Export Enhancement

- When exporting the ***Levy Register*** to Excel, the *Effective Date* column is now labelled *If Paid by or Due*, matching the wording used on the PDF report.

Invoice Printing | Second Debtor Account Number

- Debtor ***Invoice Printing*** has been enhanced to display the full second debtor account number. BCMax Lot Debtors and GLMax debtor invoices will continue to display account numbers without leading zeros.

StrataMax v5.6.164 □ Released Thursday 1st October 2026

Building Health | Creditor Balances

- The ***Building Health*** Report now includes *Creditors OK to Pay* and *Creditors On Hold* fields for improved visibility and reporting of creditor balances.

Saved Searches | Desktop Search

- Supported Saved Searches can now be made available directly from BCMax Desktop Search and StrataMax Search using the new *Include in Desktop Search* option.

Report Distribution | Distribute Levies

- A new *Address Options* setting allows users to control the address information displayed on Distribute Levies when the recipient is not the lot owner.

Task Management | Timed Tasks

- Timed ***Task Management*** allows users to record and report time against tasks, with billable entries able to be processed as ***TRMax*** consultancy recoveries.

Creditor Invoices | GST Registration Validation

- ***Creditor Invoices*** and ***Scheduled Creditor Invoices*** now validate a creditor's ABN GST registration status against the Australian Business Register and advise when the recorded status differs.

Payments Management | Reversed Payments

- Payments Management now excludes reversed payments from the default view, with a new *Reversed* field available in Search Payments.

Office Bearers | Mandatory Training (NSW Only)

- New training completion and exemption fields have been added to ***Office Bearers*** to support NSW mandatory strata committee training requirements from 1 October 2026. This information is also reportable from ***Search Office Bearers***.

DocMax | Creditor Information

- Document Properties can now display the Creditor Address, Email Address and ABN to help users confirm the correct creditor has been selected.

Merge Letters | Levy Year Fields

- New *Levy Year Start* and *Levy Year End* merge fields are available for use in ***Meeting Hub*** templates and standard ***Merge Letters***.

Creditor Invoices | OK to Pay

- Creditor Invoices now displays the *OK to Pay* status for quick verification when entering creditor invoices.

Arrears Notices, Creditor and Debtor Invoices

- The preview phase has now been completed, and the legacy screens will no longer be available.

Journal Preparation

- With the legacy Creditor Invoices screen no longer being an option,***Journal Preparation*** will no longer be available for creditor records in the old year. (Use ***Creditor Invoices Preview***) for this type of entry using an old year date.

StrataMax v5.6.163 □ Released 18th September 2026

Debtor Invoices | Due Date Update Enhancement

- A new Due Date update feature has been added to Debtor Invoice Edit. Users can now select an *Update to [Date]* button to automatically recalculate and apply the invoice due date based on configured payment terms.

Security | Disbursements

- A new *Disable Disbursements* security option has been added to User Profile and Manager Accounts. When enabled, users can continue to create and view Disbursements in TRMax, however they will be marked as *No Charge* and recoveries will not be processed through GLMax.

Multi-Factor Authentication

- Multi-Factor Authentication (MFA) can now be enabled for StrataMax logins, providing an additional layer of security. Users will be required to register an authenticator application and enter a one-time code at login. For setup steps, see ***Setting Up Multi-Factor Authentication (MFA)***.

BAS | PAYG Instalment Reporting Improvements

- Enhancements have been made to PAYG Instalment tax processing within BAS reporting. PAYG Instalment Provision accounts and related transactions will now be excluded from BAS calculations.

Levy Management | Levy Arrears Enhancements

- Significant enhancements have been introduced to Levy Arrears, including support for the new Levy Arrears Report Distribution preview feature, direct crediting of arrears fees from Arrears Manager, migration of key configuration settings from legacy Arrears Notices, improved Message Maker configuration management, and enhanced fee validation and processing capabilities.

Task Management | Child Tasks and Task Templates

- Task Management has been enhanced with the introduction of Child Tasks and Task Templates. Child Tasks enable users to create multi-level task structures with separate owners and due dates, while Task Templates provide reusable task workflows for recurring activities.

SMS Distribution | Levy Arrears Notices

- Report Distribution now supports SMS-only delivery for levy arrears notices, merge letters and status reports. Users can send SMS communications without generating arrears notices/ letters.

StrataMax v5.6.162 □ Released 3rd September 2026

Change Code Number | Clearing Account Codes

Enhancements have been made to allow system clearing accounts to be selected in Change Code Number, including GST Gross, GST Clearing, PAYG Withholding Tax and PAYG Instalment Clearing accounts. This allows clearing accounts to be aligned with the Master Chart when buildings are transferred between managers. System flags must match for code changes to be accepted.

Creditor Invoice Work Queues | Document Deletion

Users can now delete documents directly from Properties within Creditor Invoice Work Queues. Deleted documents are removed from both the work queue and DocMax, and the next document in the queue automatically opens to streamline processing. Validation messages will display where documents cannot be deleted, such as when attached to a scheduled creditor invoice.

Preview Features | Configuration Changes

Several Preview Features have now been enabled as standard functionality and no longer require configuration, including Owner Info Preview, Funds Management, and Levy Arrears Notice to use Report Distribution. The old Arrears Notices module remains available for now but will be removed in a future release.

Preview Features | New Label Printing Setting

A new Preview Feature called "Label Printing Replacement (Merge Letters)" has been introduced. When enabled, Label Printing will open through Merge Letters by default. This applies to Creditor, Debtor,

Mortgagee and Mortgagee Reference label printing functions.

Arrears Manager | Global Export

The Export All functionality in Arrears Manager has been enhanced to allow selection of all buildings or a subset of buildings before exporting to Excel. Previously, exports were limited to the currently selected building.

Creditor Invoices (Preview) | Creditor Compliance Controls

Creditor statuses such as Prompt, Preferred and Banned are now displayed during invoice entry. Users are prevented from saving invoices against banned creditors, improving compliance and reducing processing risks.

Creditor Invoice Work Queues | Automatic Processing Controls

Auto Create All processing now recognises Prompt, Preferred and Banned creditor statuses. Invoices linked to these creditor types will no longer be processed automatically and users will receive notification messages explaining why processing was skipped.

Creditor Invoices (Preview) | Invoice Hub Tooltip

A tooltip has been added when Invoice Hub is disabled for a building, providing users with a clear indication that the feature is unavailable for the selected building.

Creditor Invoices (Preview) | Improved GST Entry and Calculation

Multiple enhancements have been made to GST invoice entry including:

- New configuration option to enter invoice amounts excluding GST.
- GST totals displayed at the top of the invoice for improved visibility.
- New Amount Ex GST field and clearer GST-inclusive and GST-exclusive entry options.
- Real-time GST calculations between inclusive and exclusive values. These changes improve accuracy and reduce manual calculations when processing invoices.

Creditor Invoices (Preview) | Configuration Enhancements

Creditor Invoice configuration settings will now be applied more consistently throughout invoice workflows. Settings controlling creditor selection, creditor history, account selection and TaskMax work order selection will be respected across invoice entry, DocMax processing, work queues and building changes.

Creditor Invoices (Preview) | Additional Improvements

Several usability improvements have been introduced including:

- Wider creditor selection fields to display longer creditor names.
- Improved visibility of Posting Date and Posting Month information.
- Pro-Rata Pre-Payment account selection now supports both Asset and Liability accounts.

StrataMax v5.6.161 □ Released 20th August 2026

Payments Management | View Document Properties

- Payments Management has been enhanced to allow creditor invoice documents to be viewed directly from the Payments Management screen. Selecting the *Properties* button opens the document viewer, enabling users to review, update, email, or print invoice documents using existing DocMax functionality.

GLMax | Import Buildings as Debtors

- The *Import Buildings as Debtors*process in GLMax has been enhanced with new address validation to improve data quality and ensure debtor records contain the address details required for Report Distribution.
- Before an import can proceed, the system validates that the selected building has address information populated in Building Information.
- Buildings without valid address details cannot be imported, and users receive immediate feedback when validation requirements are not met.

StrataMax v5.6.160 □ Released 7th August 2026

Account Selection

- Account selection has been enhanced to prevent accounts with certain system flags from being selected. This change improves data integrity across a wide range of financial processing areas, including receipts, reconciliations, creditor and debtor invoices, journals, account maintenance, levies, and DocMax invoice processing.

Creditor Invoices (Preview) | User Interface Alignments

- The new Creditor Invoices interface has been updated so the Total amount now displays on the left-hand side of the screen. The change applies to Creditor Invoice (Preview), Creditor Invoice Work Queues, and Scheduled Creditor Invoices.

Notifications | Legacy Creditor Invoices and Arrears Notices

- Notification alerts have been added to the legacy Creditor Invoices and Arrears Notice modules to advise users these modules will be retired from 1st October. The notifications direct users to the replacement functionality and associated online help resources.

Levy Arrears | Split Levy Setup

- Enhancements have been made to Levy Arrears so arrears notices now honour the fund allocation configured in Split Levy Setup. Notices can now be generated separately for owners, agents, or other recipients based on responsibility for specific funds, ensuring more accurate arrears communications.

Search and Export Enhancements

- A new Added Date and Time column has been added to DocMax Work Queues, Advanced Searches and Saved Searches. Additional date and time export improvements have also been made across Search Tasks, Log Viewer, Communication Logs, Building Info History and Report Distribution Logs.

StrataMax Desktop | Search Enhancements

- StrataMax Desktop Menu Search has been enhanced to return up to 45 matching menu options, display results across multiple columns, and prioritise accessible menu options.

Levy Management | Levy Arrears Disbursements

- Two new configuration options have been added to Global Levy Notice Configuration allowing users to control whether additional print and email disbursement charges are raised when levy and arrears notices are distributed. These settings apply to the new Levy Management and Levy Arrears modules only. See page 12 for more information.

Account Group Setup | ABN Configuration

- Account Group Setup has been enhanced to allow individual account groups to be configured to use the Building ABN. A new Use Building ABN option provides greater flexibility for buildings operating multiple account groups with different ABN and GST requirements. Additional validation has also been added to assist with BAS registration compliance. See page 15 for more information.

API Enhancements | Inspections

- Two new API endpoints have been introduced for retrieving inspection data. One endpoint allows retrieval of inspections by building ID, while a second endpoint provides access to inspection data across all buildings using filter options. See page 16 for more information.

StrataMax v5.6.159 □ Released 27th July 2026

Account Selection

- Account selection has been enhanced to prevent accounts with certain system flags from being selected. This change impacts Move Fund Balances, Bank Account Setup, Bank Reconciliation, Payment Entry and Report Distribution Data Filters, helping to improve data integrity and reduce incorrect account selections.

Creditor Invoice (Preview) | Bill to Owner

- The Bill to Owner functionality has been enhanced with a new *Income Code* field. Users can now select an alternative income or general ledger account when on-charging costs to owners, rather than being restricted to the original expense code, providing greater flexibility and improved financial reporting.

Creditor Invoice (Preview) | Creditor Email Addresses

- A new option has been added to display creditor email addresses within ***Creditor Invoice (Preview)*** and ***Scheduled Creditor Invoices***. When enabled through configuration, users can easily identify available remittance advice email addresses directly from the user interface.

Building Information | Interest Days Tooltip

- A new tooltip has been added to the *Interest Days* field in ***Building Information***. The tooltip explains how legislative minimum interest charging periods are applied and assists users with correctly configuring arrears interest settings. No changes have been made to arrears interest calculations.

Global Transaction Searches | Building Number Filter

- The Building Number filter has been enhanced to support additional filtering options when using *Any Of* or *Not Any Of* selections. Users can now more easily identify buildings based on GST registration status and other available building search criteria.

Creditor Maintenance | Creditor Compare Improvements

- Creditor Compare has been improved to prevent deletion attempts for creditors linked to GLMax Companies through active manager and building relationships. Invalid deletion options are now hidden, reducing system errors and improving data integrity.

Ledger Card | Address Display Configuration

- A new global configuration setting has been added to ***Ledger Card*** distribution, providing greater control over address information displayed on distributed Ledger Cards.
- Users can choose to display the recipient details, suppress address information for non-owners, or display only the owner's name without an address to assist with privacy requirements.

Roll | New Tenant

- When creating a new tenant in the ***Roll***, the Postal Address field will now automatically populate with the lot address. If an existing contact is selected, the contact's address will continue to populate the Postal Address field.

Payments Management

- ***Payments Management*** is now the primary payment management screen available from the StrataMax menu.
- Payment reversals initiated through ***Bank Reconciliation*** will now direct users to the updated Payments Management screen.
- An Amount restriction has also been added to the default search criteria.

StrataPay | Credit Card Acceptance

- New StrataPay Credit Card Acceptance controls have been introduced to assist strata managers in preparing for regulatory changes effective 1 October 2026.
- A new building-level *StrataPay Cards Accepted* field allows managers to determine whether individual buildings will continue accepting credit card payments or cease acceptance from the regulatory commencement date.
- An optional decision date can also be recorded.

StrataMax v5.6.158 □ Released 9th July 2026

Process Bank Reconciliation | Opening Balances

- This update improves the Bank Reconciliation process by introducing automatic allocation of opening balance transactions. The enhancement reduces manual intervention when matching opening balance deposits received via bank statements. Please see page 3 for all the details.

Levy Management | Levy Arrears Manager

- Configuration has been added to allow setting an Arrears Notes Category. This category is applied to automated notes generated when arrears notices are issued and can also be used for manual notes.

Certificates | Info Editor

- A vertical scroll bar has been added to the Certificates Info Editor, allowing users to easily view and manage large amounts of text in certificate fields.

Searches and DocMax | Restriction Criteria

- The 'Restrict To' criteria has been enhanced with Up and Down arrow options, allowing users to quickly reorder criteria in all searches and within DocMax Work Queue and Saved Search setup.

Invoice Hub | Sorting

- Sorting functionality has been added to the Submitted Date column in Invoice Hub, allowing ascending and descending date sorting.

Account Groups | BAS and Income Tax

- The consolidated BAS and Income Tax options have been removed from Account Group buildings. BAS and Income Tax reporting is now automatically available per Account Group where applicable, simplifying the user experience.

Web API | Owners Endpoint

- The /roll/owners endpoint now uses the Combined Owners Name field from the Roll, improving data consistency.

Web API | New Fields

- Additional fields have been introduced across multiple API endpoints, including Building Number across several endpoints and a Termination Date field for management fees.

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.