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.
- Priority: a pick-list to assist with managing the urgency of a tack. 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.

📔 Task Deta	^{Is} 1		-			×
Due Date	16/07/2025 15	Checklist	0	/ 3	comp	pleted
Title	This is the title		_	4		Add
Description	This is the description					
	3	Checklist item 1	•	•	×) î
4		Checklist item 2	•	•	×	
Building	LK Task KEEP 154112 - ×	C. Califolia b				
State	In Progress	Checklist item 3	^	*	×	~
Priority 6	Medium					
Assigned To	Users 7	Notes Newest first				
Category	Maintenance 👻			-	12	Add
C dd Link	URL	Note 2			;	×
Add Link	Name					
Documents	(1) Links (1)	Note 1 09 Jul 2025 - tristan.collins			;	×
10	se Manager 🗙	10 13			14	
		Add Document Save and C	ose		Clos	e

Task Management | Buttons

View: Kanban 🔻 🔍 Search Categories Schedules

+ Add Task Mark Selected As Complete

Delete Selected

Close

• *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. Enter any information required in the task (see the Task Details Overview section above for an explanation of the various settings and fields).
- 4. 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	Search Logs						-		×
•	Assigned	Refresh Expo Field	rt 💐	Advanced	Condition Value					0
	to	Date/Time		ŀ	is on or after Specific Dates Yesterday					
•	Due Date	Category			is equal to					
•	Priority	Osername 31 records displayed			is equal to		F	Find First	Find N	lext
_	Nataa	Date/Time	Log Level	Username	Description	Building	Categor	ry		
•	Notes	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 'tristancollins' 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		_	~
					Print Load/Edit/Delete Search Save Sea	arch S	ave Sear	ch As	Close	e

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 Managemen ⁴	nt										-	
Date Filter		Enter search term	C Tasks found: 49									1
Today	Tomorrow	Title	Building	Priority	Due Date	Completed Date	State	Assigned T	o Progre	ess		
This Week	Next Week	New Task		Medium			NotStarted	CJ				
This Month	Clear	Electric vehicle charging stations	SP 8526 Keep	Medium	18 Mar. 25 45 days		InProgress	Users				
Custom Range	e	Generate Levies	SP 8526 Keep	Medium	20 Mar. 25 43 days		Complete	CI				
Show completer	d in last 30 days	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				
Assigned To		ABC Building - Arrange Plumber	SP 8526 Keep	Low	24 Mar. 25 39 days		Abandoned	C				
Show All Me And My Grou	upr	Call back Agent	SP 8526 Keep	Low	28 Mar. 25 35 days		Abandoned	dborin				
 Specific Assignm 	nent	test	SP 8526 Keep	Medium	28 Mar. 25 35 days		Abandoned	dborin		0%		
craig.jeffcoat	-	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	C				
uilding / Compa	any Filter	Replace security cameras	SP 8526 Keep	Medium	01 Apr. 25 31 days		InProgress	Users				
All Buildings		Review Quotes for Fence	Canadiagener	Medium	09 Apr. 25 23 days		Blocked	dborin				
 My Buildings (Ar 	ecount Manager)	Renee		Medium	09 Apr. 25 23 days		Blocked	RS				
Management Of	ffice	Must get done today.		High	10 Apr. 25 22 days		NotStarted	dborin		0%		
	~	Review legislation changes planned		Medium	10 Apr. 25 22 days		InProgress	CJ		75%		
Office Tasks		Review quarterly financial statements		High	10 Apr. 25 22 days		NotStarted	Users				
ategory Filter		Schedule annual fire inspection	Children and Child	Medium	12 Apr. 25 20 days		NotStarted	Users				
cutegory ritter		ABCDE		Medium	14 Apr. 25 18 days		InProgress	PB				
		Update committee contact list	of the second	Low	14 Apr. 25 18 days		NotStarted	Users				
V SNOW All		Laulene	JCE	High	14 Apr. 25 18 days		InProgress	dborin				
		Renee Task - Testing Meeting	Constitueinerse	Low	15 Apr. 25 17 days		NotStarted	RS				
		Update building insurance policy	Children (High	15 Apr. 25 17 days		Abandoned	Users				
		Generate Levies		Medium	17 Apr. 25 15 days		NotStarted	TC				
		Repaint parking lot lines	10 Millionp	Medium	19 Apr. 25 13 days		InProgress	Users				
		Renovate lobby entrance	10 00 0 mg	High	21 Apr. 25 11 days		InProgress	Users				
		Committee Meeting - 1/5/25	JCE	Low	22 Apr. 25 10 days		NotStarted	NS				
		Replace elevator control system	O STOCKER	High	22 Apr. 25 10 days		Blocked	Users				
					Viewe	▼ Q Search	atenories	Schedules	- Add Task	Mark Selected As Complete	Delete Selected	Clore

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 Manageme	nt							-	
Date Filter		Enter search term	Carl Tasks found: 4						9 🌣
Today	Tomorrow	TODO (0)		IN PROGRESS (2)		COMPLETED (1)			
This Week	Next Week			Review Draft Budget for Comment	SP 8526 Keep	Generate Levies	i	SP	8526 Keep
This Month	Clear			Due: 31 Mar. 25		Completed:		0	C
Show complete	e d in last 30 days			S2 days overable ::	29 LOW			89	Medium
	a in last 50 days			Review legislation changes planned					
Assigned To				22 days overdue !!	() Medium				
Show All Ma And My Gro				• • • • • • • • • • • • • • • • • • •					
 Specific Assignment 	nent								
craig.jeffcoat	•								
Building / Comp	any Filter								
All Buildings	any men								
O Current Buildin	9								
My Buildings (A Management (A)	ccount Manager)								
() Management C	~								
Office Tasks									
Category Filter									
	~								
Show All									
Kanban Options									
Show All Colum	nns								
				View Kanhan V	rch Categories Schedul	loc Add Task	Mark Selected Ac Complete	Delete Selected	Class

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.

🔋 Task Management					- 🗆 ×
Date Filter	Enter search term	Carl Tasks found: 18			🌲 🌣 🙆
Today Tomorrow This Week Next Week	<< <		May 2025		Today >>
This Month Clear	Monday	Tuesday	Wednesday	Thursday	Friday
Custom Range	28	29	30	1	2
Show completed in last 30 days					
Assigned To					
Show All					
Me And My Groups	5	6	7	8	9
Specific Assignment craig.jeffcoat	Review Draft Budget for Comment SP 8526 Keep 11 days overdue !!		ABC Building - Arrange Plumber SP 8526 Keep 🔊 9 days overdue !!		
Building / Company Filter	< >		~ c >	~	
All Buildings Current Building My Buildings (Account Manager) Office Tasks	12 National Conference	13 Draft Budget Due SP 8526 Keep 3 days overdue !!	^ 14	^ 15	^ 16
Category Filter			×	×	× ×
Financial ~	19	20	21	22	23
Show All		Plumbing Issue CJ SP 8526 Keep D Medium			
Calendar Options					
Show Weekends	26	27	28	^ 29	^ 30
Month View Week View			Building Transfer Due		
	Vie	u Calandar 🔻 🖸 Search Catago	v < >	r Add Tack Mark Selected Ac G	Complete Delete Selected Clore
	View	W: Calendar 🔹 🔍 Search Catego	Generate Auto Task	Mark Selected As C	Close Close

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.

Date Filter					
Today	Tomorrow				
This Week	Next Week				
This Month	Clear				
📀 Custom Range					
Show completed in last 30 days					

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 of security groups you are a member of, select *Me and my groups*.

Assigned To
Show All
O Me And My Groups
 Specific Assignment
craig.jeffcoat 🔻

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.

Building / Company Filter				
All Buildings				
Current Building				
 My Buildings (Account Manager) 				
 Management Office 				
 Office Tasks 				

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
O 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.

Task Category Mar	nagement				_		×
							0
Category Name		In Use	Tasks				
Category Name:	Annual General M	leeting					
	Usage: 8 task(s) use this o Last used 4/15/20 an AGM on a array	ategory 125 4:37:16 PM nged date and	by Task : F time	ass committee	resolution	to conv	/ene
Correspondence		Ð	9				
Financial		Q	11				
Internal Procedure		Ω	4				
Maintenance		Ω	12				
Red Sciences and		Ω	1				
Legal Action			0				×
		+ Add (Category	Save C	Changes	CI	ose

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 <u>after</u> its creation.

Please note that scheduled tasks will only create tasks for dates in the past for up to two months.

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, the start date is when the first task will be created.
 - 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).
- 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.

Scheduled Tasks			-	-		×
Available Task Automation	Schedule Configuration					0
Enter search term Q	Basic Information		Task Checklist Template			
AGM - Arrange financial audit (Next: May 02)	Schedule Name:	Monthly Levy Run			1	Add
Arrears Run (Next: May 03)	Description:	Generate & Issue levy notices.	Managers - note exceptions	•	•	×
Finalise BAS (Next: Aug. 02)			Check for outstanding Minutes			\mathbf{x}
Insurance Due				-		
Issue levies - LK Task (Next: Jul. 15)	Task Template					
Management Fees (Next: Jun. 02)	Task Title	Generate Levies				
Monthly Levy Run <i>(Next: May 17)</i>	Description	Generate levies				
New LeviesDue		https:// smhelp.stratamax.com/help/				
New Schedule (Next: May 16)		global-levy-generation				
	Priority Assign To: Category Schedule Settings Frequency:	Medium craig.jeffcoat craig.jeffcoat Monthly				
	Start Date: End Date: Skip Weekends: Notice period before due	2 5/225 15 Select a date 15 2				
		Add Event Ad	dd Schedule Delete Sav	e	(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 three months for all buildings. An event date can have multiple tasks automatically being created if required. Event Types that are currently available for selection include:

- Building Year End
- Levy Year End
- First AGM
- Next AGM
- Next General Meeting
- Insurance Valuation
- Next Sinking Fund Report Due
- Lift Registration Due
- Contract Next Option Renewal
- Contract Increase Due
- Contract Expiry
- Insurance Due
- Levies Due
- Fire Safety Inspection
- Emergency Lighting Inspection

- Termite Inspection
- Health & Safety Inspection
- Unfinished Work Order (based on work order finish date)

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.
 - 1. 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.
 - 1. Set the required task title.
 - 2. Use the description to include any additional information that may be required to include help links for procedures etc.
 - 3. Set the priority of the task.
 - 4. Select the user or user group the tasks will be assigned to.
 - 5. Set the required category if applicable.
 - 6. Select the Event Type from the list of available events.
 - 7. 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.
 - 8. Add any checklist items that are required on the tasks.
 - 9. Select Save.

Scheduled Tasks				_		×
Available Task Automation	Event Configuration					8
Enter search term Q	Basic Information		Task Checklist Templ	ate		
AGM - Arrange financial audit (Next: May 02)	Enabled Schedule Name:	Insurance Due				Add
Arrears Run (Next: May 03)	Description:		Quotes have been	received 🔺	*	×
Finalise BAS (Next: Aug. 02)			Committee have o	letails 🔺	•	×
Insurance Due						
Issue levies - LK Task (Next: Jul. 15)	Task Template	Insurance Due				Í
Management Fees (Next: Jun. 02)	Description	Insurance is due in 7 days				
Monthly Levy Run (Next: May 17)						ſ
New LeviesDue New Schedule (Next: May 16)						ĺ
Run Levies (Next: May 16)	Priority	Medium 🔻				
Unfinished Work Orders	Assign To:	craig.jeffcoat 🔻]			
	Category	Maintenance •				
	Event Settings					
	Event Type	Insurance Due 🔹				
	Notice period before due	7				
		Add Event	Add Schedule Delet	e Save		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 Kee	ep 8526				-	×	2
View: All Fields View:	Search						
Status	Active		Mark as Inactive	Mark as Lost	~		
Status	State	NSW	Walk as mactive				
State, Legislation & Type	Туре	Strata Plan (S.P.)		~			
	Regulatory Module			~]		
	Strata Schemes Manager	nent Act 2015			1		
Body Corporate Name	SP 8526 Keep				\Rightarrow		
Building Long Name					\Rightarrow		
Address					\Rightarrow		
Australian Business Number (ABN)				Branch:	\Rightarrow		
Building Short Name					Å		
Plan Number	8526				$\overrightarrow{\mathbf{x}}$		
CTS Number							
Date of Registration of Plan	01/08/2024			•			
Property Type						D)	
Registered Address					\Rightarrow		
						~	r
			Notes Histo	ory Report	s 🖬	ave Close	