# **Meeting Notices**

Last Modified on 19/08/2025 11:20 am AEST

This section of the guide covers how to generate, edit, and distribute the meeting notice in Meeting Hub, after the *meeting creation process*. In order to generate the meeting notice, the meeting status must not have progressed to 'Notice Issued'. Also, all attachment placeholders in the meeting and the motions must have attachments, and the correct *Template Groups* must be present.

Please look at the *Meeting Hub Templates* page to review samples of OTS templates. Please be aware that these templates cannot be amended by users. However, amendments and changes can be made to each <u>meeting notice</u> and <u>meeting minutes</u> document in Word, once they have been generated.

When performing any functions related to merge letters, such as editing templates and distributing / printing, it is vital that before using this function, you have no other running instances of Word open in the background. Continue to ensure that whilst any processes in this area are taking place, you don't open any other documents until the editing of the template you are working on, or the processing of a distribution is completed. If you still continue to encounter errors, and you have Word closed, please email StrataMax support, so we can investigate further.

### **Generate Meeting Notice**

1. In the *Meeting Details* screen, click the *Meeting Notice* button, then the *Generate* option.



 The notice will open in Microsoft Word where it can be reviewed and the *formatting* can be edited. The length of time it takes to open Word and display the document depends on your PC and your network. It is strongly advised to<u>NOT</u> edit any Agenda or Motion *wording* or *sentences* in the meeting notice document in Word, as it will then differ from the details in *VoteMax*. These types of changes should be made in the relevant motion or agenda item in the *Meeting Hub* interface before a new meeting notice document is generated. Formatting changes such as removing extra spaces or paragraphs however, are fine since these have no bearing on the details in *VoteMax*.

3. If any formatting changes are made, then the document needs to be saved before Word is closed.

It is recommended to make any formatting changes<u>after</u> the notice or minutes have been reviewed thoroughly, and have received necessary approval. This saves users from making formatting changes every time a change is made in Meeting Hub, and a new notice or minutes document is generated, superseding the previous one.

### **Meeting Notice Secret Ballots or Secret Votes**

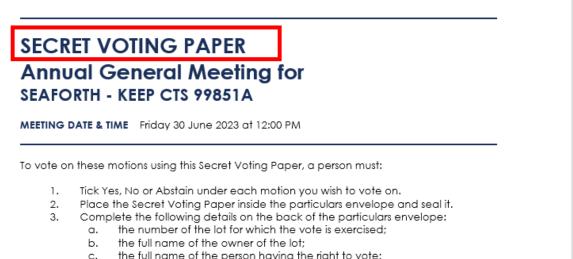
Currently the Secret Voting Paper and the Secret Ballot Paper will need to be separated from the rest of the Meeting Notice prior to distribution.

The Meeting Hub OTS templates are designed to accommodate secret vote and secret ballot motions.

5.	NON AUDIT Statutory Motion - By Secret Vote	Special Resolution Submitted by Committee
	30th of June 2023 of the Body Corpore If you want the accounts to be audite be audited vote "YES". Note that the r	ed vote "NO". If you do not want the account to notion is drafted in the negative to properly nd Regulations which require an audit to be
	Please use the attached secret ballot	voting paper to vote for this motion.

Secret Ballot for SEAFORTH - KEEP CTS 99851A MEETING DATE & TIME Friday 30 June 2023 at 12:00 PM						
A ballot for the cor position.	nmittee is or	nly required if there are m	ultiple candidates for a particular			
A proxy cannot be	used for the	election of committee.				
CHAIRPERSON (Ballot Required)						
enani Eneen (						
Nominee Name	Status	Nomination By Details	Payment Conditions			
	<b>Status</b> Owner	Nomination By Details Self-Nominated	Payment Conditions Nil			

A 'Secret Voting Paper' will be inserted in the meeting notice, and will only contain those motions that have been flagged as requiring a secret vote.



- c. the full name of the person having the right to vote;
  d. the basis on which the person has the right to vote (i.e. owner, nominee etc.).
- e. the signature of the voter; and

### **Meeting Notice Documents in DocMax**

Generating a meeting notice or minutes document in Meeting Hub will automatically save the document in DocMax, and can be viewed in the *Recently Added* documents.

<ul> <li>Search</li> <li>Browse by Building/Category</li> <li>Advanced Search</li> </ul>	Recently Added All recently added Documents.
Saved Searches	Added By
Recently Added	Added From 🗸
<ul> <li>tt Work Queues S</li> <li>My Assigned</li> <li>Online Portal Uploads</li> </ul>	Refresh first 100 records displayed  Select / Deselect All  Title
	Notice of Committee Meeting

In the **Document Details** section of each document, the *Title* and *Description* fields will automatically be populated, and a new DocMax *Category* will also be assigned.

Save Changes	Discard Changes			
Document Profile		Assigned To	-	
Status		Action Date	•	
<ul> <li>Custom Proper</li> </ul>	rties			ABC
Ocument Det	tails			Strata
	Property Docum	nent 🔘 Internal Document		Sliala
Building	2020 MEETI	NG HUB Account Manager	- ×	
Lot Details			- ×	
Owner				Notice of
Category	▼ Mee	etingHub Meeting Notices 🔀		Committee Meeting
Title	Notice of Committ	ee Meeting		MEETING HUB CTS 2020
Description	Notice of Committ	ee Meeting for MEETING HUB (202	0) held on Wedne	WIEETING HUB CTS 2020
N				

These categories are created automatically the first time a notice or minute document is generated.

- Meeting Notices will be assigned to the '*MeetingHub Meeting Notices*' category.
- Meeting Minutes will be assigned '*MeetingHub Meeting Minutes*' category.

If previous meeting notice, agenda, or minutes documents exist in **DocMax** with their own existing Category, there are a couple of ways that these can be changed in order to ensure they all fall under one Category.

- Existing / previous meeting documents can be changed to the new *Meeting Hub* categories in bulk. This means any future Meeting Hub documents won't need their Category changed each time they are generated and added to DocMax.
- 2. A profile can be created to change the category of each new Meeting Hub document to the existing meeting category, as and when they are generated and saved in DocMax.

### **Edit Meeting Notice**

Please check out the *Meeting Hub | Document Editing video* which gives you tips, tricks and best practices for editing the *Meeting Hub notice* and *Meeting Hub minutes* documents in Word.

- Click the *Meeting Notice/Minutes* button, then the *Edit* option. This will open Word with the current document stored in *DocMax*.
- 2. Make any changes and save before closing Word. It will not supersede the current document in *DocMax*.

It is strongly advised to<u>NOT</u> edit any sentences, words, or content in the Meeting Notice Word document as it will then differ from the details in Meeting Hub, and what owners see in *VoteMax*. These types of changes should be made in the *Meeting Details* screen in *Meeting Hub*, and then a new meeting notice document should be generated. Formatting changes such as removing extra spaces or paragraphs however, are fine since these have no bearing on the details in *VoteMax*.

 After making the necessary changes in the Meeting Details screen, click the *Meeting Notice* button, then the *Generate* option. This will present a prompt confirming if the existing document should be superseded.

Generate Notice	×			
A notice document for this meeting already exists in DocMax. Are you sure you want to supersede it?				
Yes No				

2. The superseded document can still be viewed in *DocMax*.

## **Distribute Meeting Notice**

Once the notice and all accompanying documents have been finalised, the notice can be distributed as a meeting pack. After selecting the *Distribute* option, the *Report Distribution* window will open. Please refer to the *Report Distribution* article and the *Merge Letters QRG* for more detailed information on this screen.

1. Click the *Meeting Notice* button, and select 'Distribute'.

Back	Save	Meeting Notice 🔻	Export Attachments	Voting Simulation
Meeting		Generate Edit		
Details of Ann		Distribute	for ONE STREET (123)	

- Immediately the 'Report Distribution' screen will open, with the 'Report Selection' window on top for you to select the notice cover letter from the list of merge letters. Select the require cover letter and click the *Select* button.
  - You can also click the *Cancel* button if you don't want to select / include a cover letter for the notice.

Report Distribution - Meeting Notice Building:	Report Selection – □ ×	0
Report Set: 💉 🔽	AGM Notice Letter  AGM Notice Lett  AGM Notice Le	ution Method ost Snagit 2019 (redirected 10) mail ave Report Preferences Correspondence V
Recipient Type: Lot/Owner V Filters C Account Lot Unit Name O2100001 1 1 Craig Jeff O2100002 2 2 C Tony Geo O2100007 7 7 C Pauline &	AGM-Notice Co  AGM-Notice Co  Arrears MRG1.L  Arrears Notice Le  BCMax Intro Lett  BCMax Intro Lett  Bry-Law Breach  By-Law Breach  By-Law Breach  Debt Collection ( Demo Letter MF  Inspections Mee  Legal Action MI	g.jeffcoat@stratamax.com Q ge@georgemail.com Q @hotmail.com Q
Please add a report	Merge Letters Only Select Cancel	Log Proceed Close

- 3. After selecting a cover letter, the cover letter, the notice, and any attachments will be listed in the 'Report Distribution' screen.
- 4. From this point, please refer to the *Merge Letters* article for guidance on how to proceed, including how to choose recipients, add attachments, add more reports to the meeting pack, etc. Note all attachments will be set as separate attachments in the merge letter interface. To send all documents as one attachment, simply right-click each attachment and unselect 'Separate Attachment' as required.

	Report Distribution - STRATAMAX ONLINE HELP KEEP 300621
	Meeting Notice
	Building: STRATAMAX ONLINE HELP KEEP 300621
¢	Report Set: 🔹 🖌 🖌 🖌 Report Set:
	Merge Letter AGM Letter NS
Sepa	arate Attachment
Emails will include this as a separate attachment and will not	include it in the main report
	🕂 Report 🕕 Attachme

If any changes to the notice or the meeting are needed*after* the notice is issued, the meeting will need to be adjourned and rescheduled before distributing the meeting pack again.

#### Edit Email Body & Subject

When meeting packs are being sent through the *Report Distribution* screen, more specifically by email, the system will automatically insert the body of the email. The content of the body & subject can be changed opening the *Email Template Manager* in StrataMax, or you can follow the below process.

The Meeting Hub distribution emails observe the user's *signature setting in Communication* (*Options > Signature > Use Personal*).

- 1. In the *Report Distribution* screen, click the cog wheel icon next to the *Email* box on the right side of the screen.
  - This displays the current email template.
- 2. Click the *Pencil* button to open the Email Template Management window, where the *Template Type* field will already have 'Meeting Hub Meeting Notice' selected.
- To create or modify a Global Template, click *Pencil* button to the far right. If a *LocalTemplate* is being created, search for the specific property using the *Search Building Name / Number*field, highlight the building and click on the *Pencil* button.
- 4. Enter a subject in the *Subject* line, and in the *Body* field, enter the body of the email.
  - In order to enter a paragraph, add *<BR>* at the end of the sentence like in the screenshot below.
- 5. Merge fields can be inserted in both the subject and body by clicking the *Insert Field* button.
  - Building Long Name Building Long Name field from Building Information.
  - Building Number Building Number from Building Maintenance.
  - Company Title Body Corporate Name from Building Maintenance.

- Meeting Type The Meeting Type of meeting created; for example Annual General Meeting.
- Report Name Type of document attached e.g. Notice or Minutes.
- Meeting Date Long (Friday 29 October 2021 obtained from the Meeting Date and Time field).
- Meeting Date Short (DD/MM/YYYY obtained from the *Meeting Date and Time* field).
- Meeting Location (Obtained from the *Meeting Location* field).
- Meeting Location Details (Obtained from the *Meeting Location Details* field).
- Meeting Time 12h (Obtained from the *Meeting Date and Time* field).
- Meeting Time 24h (Obtained from the *Meeting Date and Time* field).
- Meeting Time Zone (Based on the address in the *Meeting Location* field).
- 6. Select Save.
- 7. To copy a *Local Template* to other properties, click on icon '*Copy the email template details to tagged buildings*' (to delete, click on the red cross).
- 8. Tag any properties to receive the local template and clickOK.

📄 Email '	Template Setup - Meeting Hub Correspondence	_		$\times$			
Template:	Meeting Hub Meeting Notice						
Building:	Global - Applies to all buildings without a template						
Subject:	Subject: <company title=""> <meeting type=""> <report name=""></report></meeting></company>						
Body:	Dear Owner 						
	Please find attached documentation relating to the upcoming <meeting type="">. </meeting>			dia a			
	If a default email signature is configured then it will be appended to the email body autom Insert Field		when sen				

The *Security Setup* setting is titled 'Edit Email Templates' located under the 'Meeting Hub' category and access must be granted to use this functionality. Please discuss access with your StrataMax Administrator.

#### **Distribution with Bing**

Please be aware that meeting notices, minutes, attachments and merge letters issued via the *Meeting Hub Document Distribution* screen can only be sent to Bing if theBing Customer Portal has been set up. Once Bing has been contacted, and access to the Bing Customer Portal has been confirmed, there are some settings that need to be configured in StrataMax as well. Please refer to the BingMail Web API page for more info:

Please ensure that when using the BingMail EasyPost API that you have the 'StrataMax Bing Easy Post API' printer selected on the PC you will be using.

The credentials saved in this screen will apply to all StrataMax users. Once this area has been configured by one user, there is no need to repeat these steps. If you have previously configured BingMail for Levy Notices, you will not need to re-enter the details in other areas, including GLMax.

### **Levy Notice Method**

- 1. Search or select *Levy Notice/Reports*.
  - This screen is also available from the *Tools* menu in any area where printing from StrataMax is an option.
- 2. Click the *ellipsis* button next to the printer.
- 3. In the *Printer Setup* window, click *Tools* > *BingMail Settings.*

File Options Got	o Tools Help		
Screen No.	Template LNOTE171	Multi State+Extra	2nd DEPOS 2
O Printer	Printer Setup - Multi State+E	xtra	×
	Tools		Copies 1
	Adjust Letterhead		
Deposit Reference	Set Default Printer	506 B7A SM \vee Properties	
	Clear Printer Clear All Printer Settings	506 B7A SM Training	
Select Lots Select Lev		_	Change Building
Report Order	View Log BingMail Settings	Copies	
Account Code 3			Proceed
✓ Process Fees and	Save as Default	11 22 33	Close
		OK Cancel	
Message:	nessage.	<u>^</u>	

- 4. In the *BingMail Settings* window, enter the details provided by Bing Customer Service; *Account ID*, *Portal User*, and *Portal Password*.
- 5. Tick the *Duplex* box to configure the BingMail Portal to print multiple page documents on both sides of the paper. This can help reduce printing costs.
- Tick the Hold For Approval box for documents to remain on the BingMail Portal with the status "On Hold". This allows for an internal review, or approval process prior to issuing Levy Notices to lot

owners. Any uploaded documents will be included in the next print run at BingMail if this setting is switched off.

- 7. Select the required colour setting from the *Colour Model* drop-down menu.
- 8. When finished, click Close.

💥 Configuration		_		×
BingMail Settings				
Account ID	ABC123			
Portal User	4 manager@abcstrata.com			
5 Portal Password	*****			
Duplex				
Hold For Approval				
6 Colour Model	Full colour			~
	7		Clos	e

9. Click *OK* back in the *Printer Setup* window, then close the *Levy Notice/Reports* menu.

### **Merge Letter Method**

- 1. Search or select *Merge Letters*.
- 2. Click the *ellipsis* button next to the printer.
- 3. In the *Printer Setup* window, click *Tools* > *BingMail Settings*.

Report Distribution - OCEANIA K	KEEP 101023					_	×
Merge Letter							0
Building: OCEANIA KEEP 101023							
Report Set: V	🕞 🔀 🗌 Page Numbers 🗸	] Consolidate by	Contact	Distributio	n Method		
	+ Report Attachment			🖌 🖶 Post 🕻	lpload to Bing	EasyMail	≎
				🗸 🚩 Email	-		\$
	Printer Setup		_		ort		\$
	Tools	_			nces	Levy Notice	×
	Set Default Printer	PDF	Ý	Properties			
Recipient Type: Owner 🗡	Clear Printer		O Dup	ex   Simplex			
✓ Filters T₀	View Log		0.54	er O simpler			
Account Lot Unit Name	BingMail Settings	~	Number of copies	•		Sms	
✓ 02100001 1 1 2	Save as Default	t				SITIS	
02100002 2 2							-
02100002 2 2			Ok	Cancel			
🕑 02100003 3 3 🕹		<b>•</b>					
🕑 02100004 4     4 🛛 🕹							
📀 02100004 4     4      &		-					
O2100005 14 14 🕹		<b>.</b>		<u>×</u>			
02100005 14 14		1					
02100006 6 6							
02100007 7 7 🕹	•	÷					`♀ ↓
Please add a report				Log	Pro	ceed	Close

4. In the BingMail Settings window, enter the details provided by Bing Customer Service; Account ID,

#### Portal User, and Portal Password.

- 5. Tick the *Duplex* box to configure the BingMail Portal to print multiple page documents on both sides of the paper. This can help reduce printing costs.
- 6. Tick the *Hold For Approval* box for documents to remain on the BingMail Portal with the status "On Hold". This allows for an internal review, or approval process prior to issuing Levy Notices to lot owners. Any uploaded documents will be included in the next print run at BingMail if this setting is switched off.
- 7. Select the required colour setting from the *Colour Model* drop-down menu.
- 8. When finished, click Close.

💥 Configuration			_		×
BingMail Settings					
Account ID		ABC123			
Portal User	4	manager@abcstrata.com			
5 Portal Password		****			
Duplex					
Hold For Approval					
6 Colour Model	F	ull colour			~
	7			Close	e