

# Top Tips

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Save time and resources when managing your portfolio in StrataMax by regularly reviewing our latest top tips. As new enhancements and features are added to StrataMax, this page will be updated on a regular basis to ensure you are getting as much benefit out of it as possible!



## StrataPay Global Email Signature

For those of you who would like to promote direct debits to your owners, we have the below banner to insert into your StrataMax emails. For a quick guide on how to insert this into your *StrataMax Global Email Signature*, check out [StrataPay Global Email Signature](#).



## Global / Local Transactions



Search  
Transactions

Use newly released **Global Transactions & Local Transactions** to search transactions across each stored Financial Year as well as edit the description for Directs (Reference starting with 'B') Receipts, and Journals. View our instructions in our article on [Global Transactions](#) or [Local Transactions](#).

## Bank Rec. Summary Report



The **Bank Rec. Summary Report** provides a summary of the complete portfolio including Bank Account Number, statement and ledger balance, unpresented items etc. This report can be produced for a specific date in time and also reports additional information when generated to Excel. This is covered in the [Bank Reconciliation video](#).

## DocMax Merge Fields

DocMax has been enhanced with the ability to use merge fields in the document's *Title*, *Description* & *Notes* fields, and can be applied using [DocMax Profiles](#) and [Action Buttons for Work Queues](#). The use of these merge fields will save you even more time when adding, amending, and processing documents.

## StrataMax Desktop Search Bar



Enhancements have been made for easier searching across your portfolio. Search for Contacts using an Email Address or partial name details, Creditors and menu items using synonyms. See our article on [StrataMax Desktop Search](#) for more details.

## End of Month Process



Make your [End of Month Process](#) a lot easier by setting up [automatic rollovers](#). Once all necessary tasks for the building have been completed, the building will complete the rollover automatically. Contact the [StrataMax Support Team](#) to set up your schedule!

## Email Template Setup and Troubleshooting Delivery

Use [Email Template Setup](#) to customise the subject and the body of the emails that are sent out when issuing *levies, arrears notices, work orders, quote requests, or Meeting Hub notices and minutes*. This will mitigate chance of these emails being flagged as spam by your owner's email host. Merge letters will also allow for the [Email Body Text](#) to be amended. Review our technical page for [Deliverability of Emails](#) tips.

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