StrataMax New User Guide

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This article covers useful information & resources that can assist with the induction / training of any new users to StrataMax software.

> The below information is generic information provided by StrataMax; refer to your internal policy and procedures as your business / office may have specific training and induction information.

StrataMax Access and Security

When first opening StrataMax a username and password is required to log in. It is important the team member that manages security permissions in ***Security Setup*** sets the users profile with their Email Address to generate an access email, and assigns the user to the appropriate security groups; security groups can control what a user can and cannot do in StrataMax, and also what a user can view on the desktop & in DocMax.

StrataMax teams do not manage your office security permissions; refer to your internal team members if your access has not been set up appropriately. Refer to our article on *Access to StrataMax*.

StrataMax Online Courses

The StrataMax Training Team have developed multiple online courses, designed for new members of staff who are new to the StrataMax suite. All MaxSoft clients can enrol in any of these courses at any time, completely free of charge with the use of a coupon code.

Courses 1 and 2 are highly recommended for new users to StrataMax; course 1 will provide an oversight of the Maxsoft Group and the various teams that are available to assist, while course 2 will provide a basic understanding of the StrataMax software. For people new to the industry we recommend courses Strata 101, Strata 102, etc. These courses give you a basic understanding of what strata is, what the role of a Strata Manager is, how levies are calculated, etc. See our StrataMax Online Courses page for further information on the available courses.

StrataMax Online Help & Chat

The StrataMax Online Help is a collection of articles to help you make the most of StrataMax. There are individual pages with instructions based on specific menus in StrataMax, plus there are step by step articles for common processes. Visit the Release Notes page regularly to keep up to date with details of recent features and enhancements. Click here for home page and more information about StrataMax Online Help.

Can't find what you're looking for on StrataMax Online Help? If you've been unable to find the right results on your search, you may wish to use our Live Chat Service, which is designed to assist with quick, basic instruction and guidance. This can be done by clicking the small chat bubble that appears in the bottom right of your screen during business hours (AEST).

StrataMax Videos

A large number of videos are available on the StrataMax Online Help. Videos are recordings of our monthly online training sessions and are catered to the menus, features, and enhancements that are in StrataMax. See our StrataMax Videos page for all available videos.

As a new user we recommend starting with the New User video that is below, however more role specific videos are also available.

StrataMax Training Newsletter & Requests

Each month the Training team sends a newsletter to all clients who have subscribed, and contains useful FAQs, Tips & Tricks, news about upcoming or new features, and information about our Monthly Training Sessions, including the registration link. Online training is free, all you need to do is register and have a computer with either headphones or a speaker. See our ***Training Newsletters*** page to view recent newsletters.

If you would like to subscribe to the Training Newsletter, simply send us an email at training@stratamax.com

The StrataMax Training team is available for online training sessions for individuals or teams; as charges apply please check with the appropriate team member of your office before requesting training. See our Training Request page to request training.

StrataMax Basics

The StrataMax Basics page provides some important information about fundamental areas of the systems, and industry specific information. See our StrataMax Basics page for information about the StrataMax Desktop, industry legislation, shortcuts & tips and more.

StrataMax Support

The StrataMax Support team is available to assist with system queries, errors and issues. As charges may apply to support cases, and some offices have internal support channels, it is recommended you check with your internal teams on the appropriate procedure. See our Logging a Support Case for further details.