Live Sessions

Last Modified on 19/08/2025 2:48 pm AEST

Welcome to the Live Sessions page where you'll find information about the current month's webinars including their registration links. Further down the page you'll find all the recordings from the previous webinars delivered over the last twelve months.

You can also register for our webinars via the registration links in the Monthly Training Newsletter, which we highly recommend subscribing to as it also has vital information about current and upcoming updates and features, as well as tips, tricks, and other helpful training content. Just send a quick email to the StrataMax Training Team asking to subscribe and stay up to speed with everything StrataMax!

August 2025

Certificates (38 minutes)

In this webinar, we explore how to produce certificates using the Report Distribution screen, while making the most of report sets, document inclusion, and Info Editor tools. The session covers each state's requirements, along with a look at the preview features that allow you to switch between the legacy screen and Report Distribution. We also dive into where the certificate data originates, highlighting key areas such as ***Building Information***, ***Levy Management***, ***Insurance***, registers, and more.

Levy Management (33 minutes)

This webinar introduces the Levy Management changes and demonstrates how to create levies manually or budget based, approve and distribute Levy Notices locally or globally using Report Distribution. We preview Proposed Levy Reports and cover ***Levy Management, Levy Invoice Code Setup***, ***Merge Levy Notice*** and ***New Building (BCMax).***

Task Management (30 minutes)

This webinar provides a more in-depth view of the ***Task Management*** screen. It covers security permissions, configurations & settings, an overview of the different views and filters, adding and managing tasks, Automated Events and Task Shedules, as well as Quick Tasks.

June 2025

Task Management (33 minutes)

This webinar provided a preview of the then unreleased ***Task Management*** screen. It covers security permissions, configuration and the core features managers used day-to-day. Another webinar delivered in August 2025 covered this screen in more detail.

May 2025

Income Tax (42 minutes)

This session covered the setup and process for the Income Tax Preparation tools—including what the ***Income Tax Report*** looked like, configuring accounts in ***Account Maintenance***, and ways *Report Distribution* and *Searches* streamlined reports for accountants or tax agents. Two common scenarios showed how to handle part-year buildings and accrue transactions such as interest not yet received.

Payment Processing Tips (31 minutes)

This webinar highlighted how to maximise the latest Creditor and Payments features: using ***Search Creditor Invoice Items*** for hold/off-hold, setting bank-account limits with alerts, navigating the ***Invoice Hub***, processing one-off payments and owner reimbursements via ***Payment Entry***, and more.

What's New (20 minutes)

This webinar outlined the built-in *What's New* panel, DocMax Outlook add-in enhancements, new Bank Reconciliation validation, the ***Search Creditors*** upgrade and improvements in the ***Communication*** screen.

April 2025

Inspections Register (20 minutes)

This webinar provided a sneak-peek at the overhauled ***Inspections Register*** before public release, outlining new fields, filters and workflows.

Opening Balance Setup Enhancements (26 minutes)

This webinar demonstrated the revamped ***Opening Balance Setup***: single-screen fund view, process-date control, debtor-view invoice codes and a preview-financials option.

March 2025

DocMax Work Queues for Accounts Payable (43 minutes)

This webinar showed how accounts-payable teams could leverage ***DocMax Work Queues*** and Saved Searches to triage invoices quickly, with links to ***Search Creditor Invoice Items***.

Quarterly Release Notes & Enhancements (19 minutes)

This webinar reviewed the latest feature set: Bank Account Setup deposit-slip changes, ***Bank Balances***, automated ***Invoice Hub*** uploads, Roll Submission notice dates and fine-tuning ***Receipt Entry*** auto-posting.

Roll Updates & Maximising Searches (45 minutes)

This webinar presented three real-world roll-change scenarios and showed how to exploit ***Search Roll***, ***Search Office Bearers*** and ***Global Debtors*** for faster data checks.

February 2025

Journal Preparation (37 minutes)

This webinar covered entering journals for accruals and pre-payments via ***Journal Preparation***, plus alternatives using Creditor Invoices, Debtor Adjustments and *Transaction Change Code*.

Status Report (30 minutes)

This webinar explained how to schedule automated Status Reports through ***DocMax*** profiles, set default reports and control recipient lists via ***Office Bearers***.

Searches – Everything You Need to Know (36 minutes)

This webinar dived deep into StrataMax search screens - from single-building look-ups to multi-building advanced searches - and showed how to turn results into desktop dashboards.

November 2024

Meeting Hub – Meeting Lifecycle (55 minutes)

This webinar walked through the end-to-end lifecycle of a Meeting Hub meeting, from creation to closure.

Pro Tips & New Features (27 minutes)

This webinar showcased the latest enhancements in ***Interactive Reports***, *Search Local Accounts*, *Status Reports* and more.

September 2024

Contact Management (split contacts)

This webinar covered managing split contacts in ***Roll*** and ***Office Bearers***, using EFT details for contacts and new UI features in ***Contact Management***.

Merge Letters & Report Distribution – Strategies (42 minutes)

This webinar demonstrated how ***Report Distribution*** and ***Merge Letters*** combined for BAS packs, tax-info reports, nomination forms and more, including tips for auditing sent letters via the Log.

Essential Changes You Need to Know (27 minutes)

This webinar highlighted updates such as the Bank Account Change approval workflow, search-to-print, EFT remittance improvements and ***Journal Preparation*** changes.

August 2024

BAS, GST & Tax (50 minutes)

This session explored the newest BAS and GST features that streamlined reporting, introduced new tax codes, enhanced ***Account Maintenance***, simplified employee-payment setup and updated tax year-end procedures.

Data Adjustments (30 minutes)

This webinar showed how to rectify account and data-entry mistakes using ***Local Transactions***, ***Change Code Number*** and ***Transaction Report Manager***.

Lost Building (33 minutes)

This webinar covered the full hand-over process for a departing building—from finalising ***Work Orders*** and ***TRMax*** fees to closing bank accounts, exporting reports and marking the building as Lost.

July 2024

Merge Letters & Report Distribution

This webinar introduced new internal and owner report templates in ***Merge Letters*** and showed how to automate distribution.

June 2024

Enhancements & Release Notes

This webinar wrapped up icon updates, search-tool power-tips, building-lock changes and payment-configuration tweaks released over the prior six months.

May 2024

Payments Management

This webinar shared tips on reviewing creditor payments, reversing transactions, adding notes to remittance advice and re-printing remittances.

Meeting Hub – Introduction & Overview

This webinar guided new users through setting up Standard Motions, Agenda Items and Meetings, then offered a quick owner view of VoteMax.

April 2024

Management Reporting

This session explained how to generate and interpret management and income reports efficiently, with best-practice tips for boosting revenue.

Payment Entry

This webinar covered ***Payment Entry*** for owner refunds, creditor part-payments, direct debits and remittance advice.

March 2024

Daily Banking

This webinar reviewed the banking life-cycle, processing exceptions in***Process Bank Statements*** and reporting through ***Search Bank Accounts***.

February 2024

Payment Process 2024

This webinar showcased the redesigned Payments workflow with ***Creditors Management***, inline on/off-hold toggling and the consolidated Payments menu.

Creditor Maintenance & Account Maintenance

This webinar explored the overhauled ***Account Maintenance*** and ***Creditor Maintenance*** menus and their new capabilities.

Debtors Maintenance (incl. Utilities)

This webinar detailed the latest ***Debtor Maintenance*** changes, including new report-distribution options and a utilities-billing scenario.