Training Newsletter March 2025

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March 2025

Welcome to this month's edition of the StrataMax Training Newsletter! Whether you're looking to sharpen your skills, discover powerful new features, or find ways to streamline your daily tasks, we've got plenty in store for you. From exciting updates designed to boost efficiency to expert tips and tricks that will save you time, this edition is packed with valuable insights.

Help is always at your fingertips! Our **Online Help** is available 24/7, and **Chatbot** is ready to provide quick answers whenever you need them. For the best experience, after you have finished using **Chatbot** for your question, and when you're ready for a new session, simply use the refresh icon to start fresh. This will help deliver the right answers for your question.

With monthly training webinars and these handy resources, there's never been a better time to explore and master StrataMax.

StrataMax Webinar Videos

All of our previous webinars are available for viewing at your convenience on our StrataMax Videos page, so don't forget to check out those if you missed anything!

Searches | Everything you need to know

Status Reports

Journal Preparation

Invoice Hub Automation

Invoice Hub uploads are now automated, making invoice processing smoother and more efficient for every office. With this enhancement, any building using ***Invoice Hub*** for invoice approval will have pending invoices automatically uploaded daily, ensuring they are ready for Committee approval without any manual effort.

This means less time spent on admin tasks and more focus on what truly matters. Each client's scheduler has been set up for seamless automation, but if you prefer to continue with manual uploads, contact our Support Team to opt out.

Roll Updates and Maximising Searches

Why should I register for this session?

Managing the Roll is a key part of daily operations, and this session will help you refine your skills in keeping it accurate and up to date. We'll walk through the best practices for updating records, ensuring seamless communication with owners, and making the most of the Roll in StrataMax. Whether you're sending important updates, generating reports, or simply looking to streamline your workflow, this session is packed with valuable insights, handy tips, and time-saving tricks.

Join us and take your Roll management expertise to the next level!

Topics covered:
- Applying changes of ownership or detail and managing the basics.
- How Report Distribution can streamline the automation of roll reports.
- Managing other types of contacts that are available for Roll Management.
- Using Searches to simplify the contact searching process.

Thursday 13th March 2025 | 11:00 am AEST REGISTER NOW ▶

What's New This Quarter: Release Notes & Enhancements

Why should I register for this session?

Stay current with the latest improvements in our **What's New This Quarter: Release Notes & Enhancements** webinar. This session will cover key configuration changes and updates designed to streamline your workflow. We'll walk through these improvements and discuss the enhancements designed to help you work more efficiently so you get the most out of our software.

Don't miss this chance to stay informed and ensure you're leveraging the latest enhancements!

Topics covered:
- Bank Balances/Report – Enhancements for better visibility and reporting.
- Bank Account Setup – Account Title fields are now available.
- Invoice Hub – Automatic upload of invoices for increased efficiency.
- Report Distribution – Split Banking for Financial Statements.
- Roll Submission – Auto Update Notice Date for streamlined processing.

Tuesday 18th March 2025 | 11:00 am AEST REGISTER NOW ▶

DocMax | Work Queues for Accounts Payable

Why should I register for this session?

Efficient invoice management is essential for every office, and this webinar will show you how to maximize the DocMax Work Queue to streamline your approval processes and keep creditor invoices organized. Learn how to quickly locate invoices, update transaction codes, edit descriptions, and harness the power of advanced search functions to retrieve exactly what you need—when you need it. Whether you're fine-tuning your workflow or looking for ways to speed up invoice approvals, this session is packed with best practices, tips, and tricks to help you save time and improve accuracy.

Join us and unlock the simplicity of invoice processing!

Topics covered:

- Setting a work queue to be used in Creditor Invoices in StrataMax.
- Managing internal approval in DocMax.
- Apply merge fields to the document properties for consistent details on each invoice.
- Using Saved Searches in both DocMax and StrataMax which offer different applications of viewing documents or applying changes to transactions.

Thursday 20th March 2025 | 1:00 pm AEST REGISTER NOW ▶