

Training Newsletter Dec '24 - Jan '25

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Welcome to our
TRAINING NEWSLETTER



Training Newsletter Dec '24 & Jan '25

Welcome to our Training Newsletter for the end of another great year. As we prepare for the busy period before Christmas, we wanted to take you on a journey of the last year in review.

StrataMax continually strives to help you deliver more to your owners and committee, and make your day-to-day tasks more efficient. This year we have again delivered a lot of improvements, and we would like to thank you for being on this journey with us and for your continued support. Read our *2024 Wrap Up* below for more details, as well as *What Lies Ahead for 2025*.

We wish you and all your families a safe and happy Christmas, and look forward to a great New Year for 2025.

Chatbot Update

We've made some improvements to our **Chatbot**, which should help it provide answers to more questions. It's a handy way to get quick answers and instructions at any time.

You'll find it on the bottom right-hand side of the help page—give it a try!

The 2024 Wrap Up

It was another busy year with enhancements and refreshes in StrataMax. With these regular updates, it's important to keep up-to-date with the release notes that are published with each update.

Notifications will appear each time your StrataMax is updated, containing a link to the release notes page. If you have missed any of the information around these, check out the [release page here](#). Here are some of the major highlights from 2024:

- The **Payments** screen was completely refreshed.
- GST, Tax, and BAS areas all received major enhancements.
- The **Invoice Hub** UI was refreshed and received configuration enhancements.
- **Meeting Hub** was updated with a new meeting creation process and notice/minutes distribution.
- Several new Search screens were introduced throughout the year.

What Lies Ahead

Check out the [StrataMax Timeline page](#) for planned future enhancements.

- Portal: Reports & Docs, Levies, Meeting Hub, Invoice Hub, Search Agents.
- Creditor & Debtor Invoices.
- Registers: Inspections, Contracts, and more.
- Introduction of AI in StrataMax.
- DocMax Add-In.
- Budgets and Levies.
- Subgroup Enhancements.

StrataMax Webinar Videos

All of last month's webinars are available for viewing at your convenience on our [StrataMax Videos page](#):

[Invoice Hub | 2024 Refresh](#)

[Meeting Hub | Meeting Lifecycle](#)

[Pro Tips & New Features | Nov 2024](#)

Streamlines Status Report: Simplified and Enhanced

We're excited to share updates to **Status Reports** in [StrataMax 5.6.120](#)! Here's what you need to know:

Automatic Upload to DocMax and / or StrataMax Portal

For clients using Status Reports on the Portal, reports are now automatically uploaded during the Month End Rollover (if enabled in your rollover configuration). This ensures seamless storage in DocMax, based on your *Building Status Report Set* and *Monthly Status Report* profile.

Why Enable This Setting?

- Hassle-free automatic uploads during Month End.
- Easier access to reports via DocMax for you and on the portal for your owners / committee.

Enhanced Report Distribution

Status Reports now utilises the **Report Distribution** screen, unlocking new possibilities:

- **Include Additional Reports:** Add reports like Aged Balance List, Bank Transaction Reports for Operating and Investment Accounts, and more.
- **Add Attachments:** Include newsletters or other key documents from DocMax across all buildings.

Configuration Made Easy

- Your current setup will be migrated automatically.
- Report Set and DocMax Profiles will align with your existing settings.
- We recommend enabling the *auto-store Status Report* option for maximum efficiency.

Take Advantage of the Benefits:

These updates enhance your workflow by providing flexibility, improved accessibility, and a streamlined process for sharing key reports and attachments. Review the updated article on Status Reports [here](#).

Prepare Your Holiday Closing Times in StrataMax

As the holiday season approaches, it's important to keep your owners informed about your office closure dates. StrataMax makes it easy to add holiday notifications to your owner-facing reports and documents.

You can update the Email Template Manager to include a holiday message in outgoing correspondence, customise your Message Maker templates for any levy notices sent, or add the information to your email signature in Communication for seamless communication.

Detailed instructions on how to make these changes can be found in the [Email Template Manager](#), [Message Maker](#), and [Email Signature](#) help guides. Take a few moments to prepare now and ensure smooth communication with your owners, committees, and contractors this festive season!

StrataMax Team Availability over Christmas

Your Training Team and Full Service Team will be closed from the 24th of December to the 4th of January inclusive.

The Support Team will have a small number of staff available on business days throughout the Christmas period. For any urgent queries, please log a case by emailing them at support@stratamax.com.