

Training Newsletter Nov 2024

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Welcome to our
TRAINING NEWSLETTER

November 2024

Welcome to the November 2024 Edition of our Training Newsletter!

With December and the end of the year just around the corner, you don't want to miss out on this month's newsletter. Christmas comes early, with the Training Team bringing you the newest StrataMax enhancements and hot tips.

This month, we're back with three high-value webinars, starting with a new, refreshed Invoice Hub, making invoice approvals easier than ever! Then, we have a new look at the meeting lifecycle in Meeting Hub with all the latest enhancements. To conclude our November webinars with Pro Tips & New Features, introducing some of the latest features and practical tools to help streamline your work.

Make sure you click those 'Register Now' buttons and get in on the action!

Also, don't forget to check out the [Training Newsletters page](#) if you missed any of our previous newsletters.

StrataMax Webinar Videos

As always, our previous webinars are available at your convenience on our [StrataMax Videos page](#). We took a break last month from our usual webinars, so instead, we have picked the most popular topics that our clients have been searching for:

- [Insurance Video](#) and [Insurance Claims Video](#)
 - [Arrears & Reporting Video](#) and [Levies Overview & Reports Video](#)
 - [Payments Management Video](#)
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Meeting Hub Creation Update

This month, we have a new enhancement to share in Meeting Hub. The meeting creation process will change from going through multiple screens to a consolidated single screen where all fields are visible and easily changed.

We're confident that this new meeting creation experience offers a more streamlined and time-efficient way for you to create all your meetings in Meeting Hub quickly. Look out for information on this update in the coming weeks, and attend this month's Meeting Hub webinar to see it in action.

The screenshot displays the 'Meeting Hub' creation interface. At the top, there's a teal header with 'Meeting Hub' and user information 'John Smith, ABC Strata Management'. Below the header, there are two buttons: 'Exit Meeting Creation' and 'Complete Creation >'. The main content area is divided into several sections, each with a green checkmark icon:

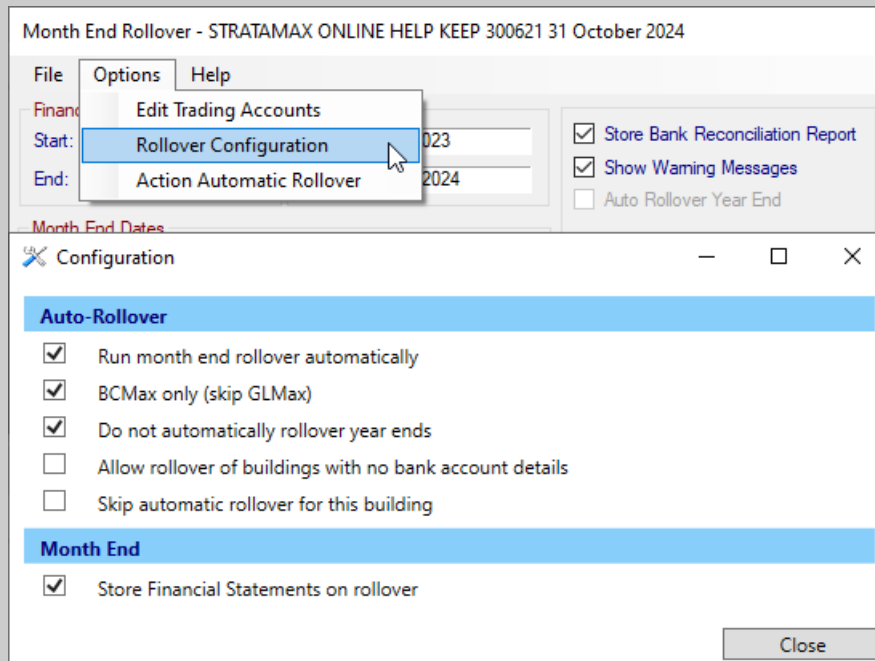
- Building:** A single-line field.
- Quorum Required:** A single-line field.
- Meeting Type:** A single-line field.
- Standard Meeting Template:** A table with two rows of templates. Each row has a 'Select' button, a title, a meeting type, a location, a date and time, and a user name.
- Meeting Date and Time:** A date field set to '31/10/2024', a time field set to '01:00', and a 'PM' indicator.
- Meeting Location:** A text field containing '173 Varsity Parade, Varsity Lakes QLD, Australia' and a location pin icon. Below it is a 'Meeting Location Details' field with the placeholder 'E.g. Meeting room on level 1'.
- VoteMax Settings:** A section with a 'Select VoteMax Settings...' dropdown menu. The dropdown is open, showing three options: 'Show in VoteMax without voting', 'Show in VoteMax with voting', and 'Hide from VoteMax'. Below the dropdown is a red error message: 'Submissions require these errors to be resolved'.

At the bottom, there's a 'STRATAMAX ONLINE HELP (1521)' section with a link to 'Annual General Meeting' and a date 'Thursday 31 October 2024 at 1:00 PM'. A scroll-up arrow is visible in the bottom right corner.

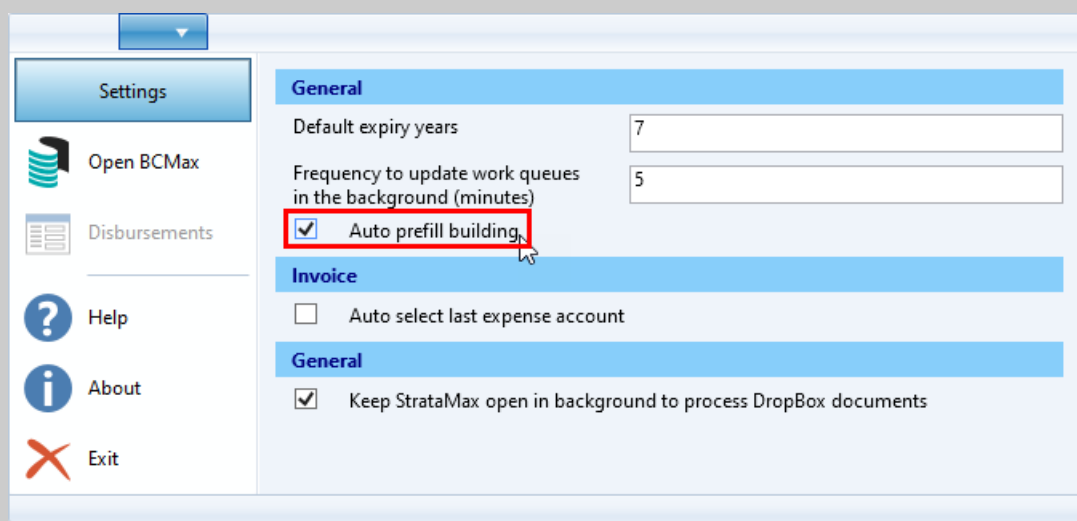
Did You Know...? Automatic Month End Rollovers and DocMax Prefills

StrataMax has multiple automated features to save you time and resources. The "Month End Auto-Rollover" and "DocMax Auto Prefill Building" settings are two. If you are not using these features, we would love to know why, so get in touch.

Month End Auto-Rollover saves you time by automatically rolling all your buildings into the next month based on the settings you have configured to suit your needs. For more details, see our [Automatic Month-End Rollover](#) article.



The **DocMax Auto Prefill Building** setting assists by automatically populating the 'Building' field in the **Document Details** section when a document is added to DocMax. This saves you a few clicks and works even better when used with DocMax Profiles - ensuring all your documents are filed quickly and correctly while making them easier to locate when needed! For more details see the [DocMax Settings](#) article



Invoice Hub

Why should I register for this session?

Whether you're new to the Invoice Hub screen or a seasoned pro, this session has something for everyone! Join us this month to explore the visually refreshed interface of Invoice Hub. You'll learn how to make the most of its seamless upload features, welcoming committees in any building to be a part of the payment process for creditors. Walk away with new tips to enhance your office processes right away!

Topics Covered

- The Basics: Set up your Invoice Hub for smooth building operations.
- Approver Defaults: Discover tips to maximise efficiency, from simple to advanced settings.
- New Interface Features: Get familiar with updated screens and understand the core functions of Invoice Hub.
- Efficient Searching: Easily locate invoices on the hub and streamline reporting with critical field information using search screens and some of the newest field enhancements.

Wednesday 13th November 2024 | 11:00 am AEST



Meeting Hub | Meeting Lifecycle

Why should I register for this session?

Jump into this webinar to get across the end-to-end process of a Meeting Hub meeting, from creating the meeting to closing the meeting and sending the meeting minutes. This webinar will also show off the most up-to-date features and enhancements in Meeting Hub, so even if you're an experienced Meeting Hub user, do not miss this!

Topics Covered

- Meeting Creation.
- Meeting Notice generation and distribution.
- Attendance Management.
- In-Meeting Management (start and close).
- Meeting Minutes generation and distribution.

Tuesday 26th November 2024 | 11:00 am AEST



Pro Tips & New Features

Why should I register for this session?

Don't miss our upcoming webinar, *Pro Tips & New Features*, where we'll introduce some of the latest enhancements and practical tools designed to streamline your work. We'll cover tips for generating custom reports, show you how to easily update email templates for one-off report distribution, and provide a few extra insights that we think you'll find valuable for maximizing your workflow in StrataMax.

Topics Covered

- Interactive Reports & ability to drill into transactions and update details.
- End of Financial Year Budget vs Actual review using the Search tools.
- One-off edit of the Email Template for Report Distribution.
- Security Setup – Copy & Paste options.
- Global report recommendations & custom reporting.

Wednesday 27th November 2024 | 11:00 am AEST

