

Training Newsletter Sept 2024

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StrataMax

Welcome to our
TRAINING NEWSLETTER

September 2024

Welcome to the September 2024 Edition of our Training Newsletter!

Spring into action, and don't miss out on this month's newsletter, packed with high value content, with critical updates, and hot tips! We're confident that this month's content will give you the edge you're looking for to make sure you're ahead of the Strata game, and keep your clients happy.

We are also very excited to share another three training webinars, covering key areas of StrataMax, which you'll not want to miss! These will help you master Merge Letters and Distribution, get across the latest improvements within Contact Management and finally, review all the important updates we have had across StrataMax in the last couple of months.

Be sure as well, to check the 5 Minute Search video we have put together which shows you how to take advantage of this powerful area within the software.

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

StrataMax Webinar Videos

As always, all of our previous webinars are available for viewing at your convenience on our [StrataMax Videos page](#).

- [Lost Buildings \(33 min\)](#)
- [BAS, GST, Tax Update \(50 min\)](#)
- [Data Adjustments \(30min\)](#)

IMPORTANT! Macquarie Bank Cheques

For our clients that bank with Macquarie, please be aware as of 1st November this year, Macquarie plans to phase out cheques. Please see their [announcement page](#) for more information. We have put together an [article](#) on important things to consider within StrataMax.

StrataMax Searches

One of the most underutilised new features in StrataMax are all the great new searches you can do across almost every area of the system. This not only gives you quick access to data with one click, but you can also convert these into [Dashboards](#) on your desktop. These searches also provide global reporting capabilities, which replace many of the 'Group' and 'Custom' reports that were previously available in **Reports / Utilities (Global)**.

Creditor Invoice Items

Refresh Export Advanced

Restrict To: **Field** **Condition** **Value**

Columns: Current Building

Sort Order: Invoice Date is in the range ☒ Specific Dates 01/08/2021 to 31/07/2023

Advanced

145 records displayed

Reference	Invoice Date	Invoice Amount	ber	Creditor Code	Creditor Name	Expense Code	Expense Name
D0000332	20/06/2023	365.00		08200176		15018	
D0000331	03/07/2023	6.60		08200002		12315	
D0000330	03/07/2023	527.70		08200002		12730	
D0000329	21/06/2023	638.18		08200016		17030	
D0000310	17/03/2023	291.50		08200049		16010	

Load/Delete Search Save Search Save Search As Close

We've created a 5 minute video to show you how you can quickly put together a search. While I'm sure many of your staff know how to do this it might be useful to send out. We also have created a follow up 15 minute video which covers using the search bar and some good examples of searches you could build. Last but not least, including a help page with more great example searches and dashboard (the invoice hub example is good one).

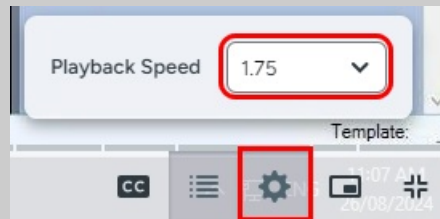
[Search Basics Video \(15 min\)](#)

[More On Searches Video \(15 min\)](#)

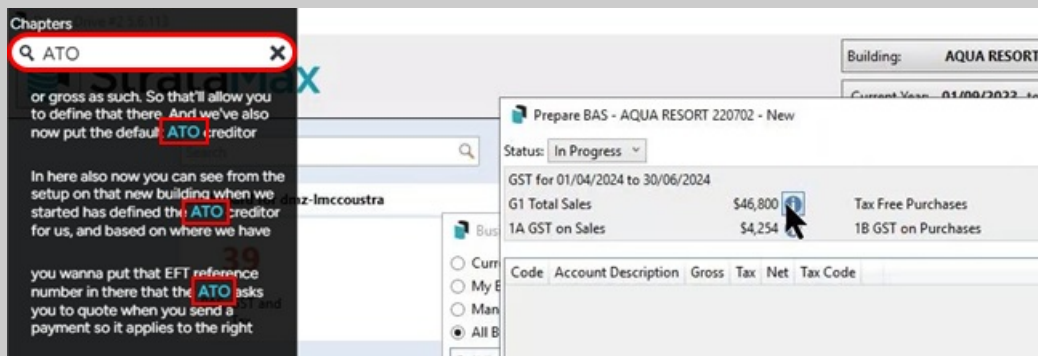
[Search Examples on Help](#)

Hot Tips on Webinar Recordings

All our Monthly Webinar videos are online, and you have full control over what you watch and how fast you watch it! Skip straight to the sections that interest you most using the handy Chapters feature. Or, kick things up a notch by adjusting the Play Speed in the Player Settings (bottom right) to suit your pace. Dive in and make the experience uniquely yours!



When Chapters are displayed, you can easily search for specific words spoken by the presenter. Find exactly what you're looking for in no time and get right to the good stuff!



Seamless Strategies for Merging Letters and Streamlining Report Distribution

Why should I register for this session?

Are you tired of the repetitive, time-consuming process of merging letters and distributing reports? Join us for an insightful webinar where we'll reveal strategies to transform these tasks into streamlined, efficient processes. Whether you're managing large-scale communications or simple one off scenarios, this session is designed to equip you with practical tools and tips that will save you time and reduce errors.

Topics Covered

- **Automated Letter Merging:** Learn how to automate the merging of letters, reducing manual effort and minimizing the risk of errors in mass communications.
- **Efficient Report Distribution:** Discover streamlined methods for distributing reports, including the more recent enhancements to this area.
- **Customisation and Personalisation:** Explore techniques for customising and personalising letters and reports, making your communications more impactful and relevant to your audience.

Thursday 19th September 2024 | 11:00 am AEST



Contact Management

Why should I register for this session?

Jump into this webinar to learn everything you need to know about managing contacts in StrataMax! You'll become familiar with the most recent changes and updates, and best practices on what to do in various scenarios. We'll see you in the webinar!

Topics Covered

- Updating a split contact in the Roll and how to apply this in the Office Bearers.
- Nominate a specific email address and how this integrates with other areas.
- Contact information, including updating BSB and Account details for all contacts and where they can apply.
- What reporting styles are available in legacy areas and new search screens.
- Maximising the changes and enhancements now available in Contact Management.

Tuesday 24th September 2024 | 11:00 am AEST



Mastering the Updates: Essential Changes You Need to Know

Why should I register for this session?

We're excited to invite you to our upcoming webinar, "Mastering the Updates," where we'll introduce the latest enhancements to our program. During this session, you'll learn about the new Bank Account Change Process, a crucial update for your accounts team that enhances the security and efficiency of managing changes to Contact bank account details. Plus, we'll walk you through various program improvements, ensuring you're fully equipped to leverage these new features.

Don't miss this opportunity to stay ahead of the curve and make the most of these important updates.

Topics Covered

- Overview of Bank Account Approval Process.
- GLMax changes including DocMax and creditors and account maintenance.
- New Building Information & New Building Setup fields.
- EFT Reference Editor
- New Security Setup permissions for Communications.

Thursday 26th September 2024 | 11:00 am AEST

