

Training Newsletter Aug 2024

Last Modified on 31/07/2025 8:57 pm AEST



Welcome to our
TRAINING NEWSLETTER

August 2024

Welcome to the August 2024 Edition of our Training Newsletter!

In this edition we highlight new tools and features to give you the knowledge you need to provide your clients with the best possible service, as efficiently and quickly as possible! Meeting Hub has changed how notices and minutes are sent, and there is a new, robust workflow for approving bank accounts changes.

We are excited to share our three training webinars this month; First up we cover how to manage lost buildings. The next webinar is a dedicated to the new BAS, GST, and Tax enhancements - critical for any accountants who assist with managing their building's tax. Don't miss the final webinar for all things around adjusting data.

Read on for valuable insights, enhancements, tips, and additional resources to make this month a productive one!

StrataMax Webinar Videos

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

Meeting Hub | Report Distribution

With the release of StrataMax version 5.6.111, the Meeting Hub Document Distribution screen was replaced with the StrataMax Report Distribution screen to provide all the current functionality, and a more consistent user experience.

Now, when the 'Distribute' option is selected when clicking the *Meeting Notice* or *Meeting Minutes* buttons, the 'Report Distribution' screen will appear where you'll be able to easily select your cover letter.

Meeting Notice

Building: [Field] [Add]

Report Set: [Field] [Add]

Recipient Type: Lot/Owner

Filters

Account	Lot	Unit	Name
02100001	1	1	Craig Jeff
02100002	2	2	Tony Geo
02100007	7	7	Pauline &

Report Selection

- Merge Letters
 - AGM Notice Letter
 - AGM Notice Letter
 - AGM Notice Letter MRG2.DOC
 - AGM Notice Lett
 - AGM-Notice Co
 - AGM-Notice Co
 - Arrears MRG1.L
 - Arrears Notice Lo
 - BCMax Intro Lett
 - BCMax Intro Lett
 - BingTest MRG1
 - By-Law Breach
 - By-Law Breach
 - By-Law Breach
 - Debt Collection
 - Demo Letter MI
 - Inspections Mee
 - Legal Action MI

Merge Letters [X] Merge Letters Only [X] [Select] [Cancel]

Distribution Method

Post Snagit 2019 (redirected 10)

mail [Settings]

Save Report [Settings]

Preferences: Correspondence

Sms

jeffcoat@stratamax.com

george@gmail.com

@hotmail.com

Please add a report

[Log] [Proceed] [Close]

Coming Soon! Bank Account Approval for Contacts and Creditors

We are very excited to announce a new feature coming very soon to StrataMax! This comes in the form of an entirely new optional workflow for managing bank account details for creditors and contacts in StrataMax.

This feature is designed to help manage the workflow around managing bank account details.

16/07/2024 11:13:18 AM TEST CREDITOR 182-244 45678910 View / Process

Contact - Change Bank Account

Current Bank Account: [] [] [] ?

Pending Change Bank Account: 182-244 45678910 MBL

☒ Confirmed with creditor/contact

Notes

Add Note [] + Add

Document: New Bank Account for Test Creditor ... View

Close Approve Reject Save

This new feature includes the following capabilities:

- Ability to enter or update bank account details while the old BSB and account also displays in the contact card.
- To prevent payments from being processed for a creditor/contact when they have pending bank account changes.
- A new StrataMax Dashboard item to identify pending bank account changes & whether the changes have been confirmed with the creditor/contact.
- Ability to attach documents that team members can refer to.
- Ability to record time stamped notes that cannot be edited or deleted.
- Separate permissions in Security Setup to allow changes to be marked as 'Confirmed with creditor/contact' and to mark the changes as 'Approved'. Only once marked as approved will payments process to the creditor/contact.

Lost Buildings

Why should I register for this session?

Join this webinar to learn the most effective and efficient way to hand over records to an incoming strata manager. Covering everything from the Report Sets, how easy the steps are to prepare DocMax documents, to what is now available in Report Distribution. Be sure not to miss this one!

Topics Covered

- Preparing a Report Set.
- Referring to Report Distribution and what is available here.
- Exporting documents from a Saved Searches in DocMax.
- What processes should be done before marking a building as lost in StrataMax.
- Other areas to be aware of when preparing for a lost building.

Wednesday 21st August 2024 | 11:00 am AEST



IMPORTANT - BAS, GST, and Tax Update - Action Required

Why should I register for this session?

You should attend this session to make sure that you are well-equipped to handle the new GST, BAS, and tax enhancements. This will help reduce the risk of errors in reporting, streamlining your processes and full search functionality too. Key features include new tax codes, enhanced account maintenance options, simplified employee payment setup, and updated tax year-end reporting procedures.

Topics Covered

- Use new BAS and GST features for accurate recording and reporting.
- Implement new tax codes and account maintenance options to enhance reporting.
- Set up and manage employee wages, including tax and superannuation reporting.
- Navigate and utilise new search functionalities for tax-related tasks.

Tuesday 27th August 2024 | 11:00 am AEST



Data Adjustments

Why should I register for this session?

This webinar will equip you with the knowledge and skills needed to easily and accurately rectify various account and data entry mistakes. Whether you're fixing account codes or updating transaction details on advice from Committee, Accountants or Auditors, our comprehensive training will cover it all.

Topics Covered

- Transaction Code Change.
- Change Code Number.
- Changing a Building Number.
- Updating Transaction Details.
- Editing CRN Details.

Thursday 29th August 2024 | 11:00 am AEST



