

Training Newsletter Aug 2025

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Welcome to our
TRAINING NEWSLETTER

August 2025

Welcome to our Training Newsletter for August.

This month is packed with **must-see training content** to help you stay ahead of product changes and industry updates.

Our Upcoming Webinars

We've scheduled key sessions covering the **features** now being rolled out. If you can't join live, be sure to catch the recordings on the [StrataMax Live Sessions page](#) - these updates are important and may impact your daily workflows.

- **Updated Levy Management** - now being released ([v5.6.135](#) onwards).
- **Brand-new Task Management** - ([v5.6.135](#) onwards) get up to speed on this powerful new feature.
- **Certificates** - a timely refresher with new legislation now in effect across some States.

StrataMax Webinar Videos

All of our previous webinar recordings are available for viewing at your convenience on our [StrataMax Live Sessions page](#), so don't forget to check out those if you missed anything!

Certificates

Certificates via Report Distribution (5.6.136)

Release notes will contain more detailed information, and the screenshots below are provided as an indication of the interface:

Certificates via Report Distribution interface:

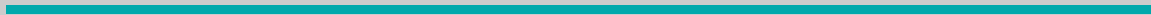
□

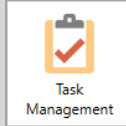
Certificate Configuration:

The screenshot shows a 'Configuration' window with the following sections and fields:

- Applicant**
 - Applicant (or Owner if not set): 02100011 "O'CONNOR"
 - Applicant Fee: 350
 - Applicant Fee Is Paid
- Certificate Settings**
 - Print Seal
 - Seal/Sig. Location: Seal/Sig. Location
 - Remove Seal/Sig.: Remove Seal/Sig.
 - Calculate Current Interest
 - Current Levies Only
 - Minimum Asset Value: 10
 - Substitute Account Manager: Testing Management
 - Document Inclusion: Document Inclusion
 - Info Editor: Info Editor
- Cover Letter**
 - Add Cover Letter
 - Manager's Cover Letter for Non-Registered
- Custom Text**

A 'Close' button is located at the bottom right of the window.





Task Management

Why should I register for this session?

This webinar will provide a more in-depth look at how the new Task Management screen can boost your productivity! Learn how to effortlessly use this intuitive, dynamic solution to organize your to-do list, collaborate seamlessly with your team, and track progress with crystal-clear visibility.

Topics covered:

- Quick look at permissions in Security Setup.
- Task Management Configurations and Settings.
- Overview including on-screen views and options.
- Adding and managing tasks.
- What are Quick Tasks and how to use them.

Tuesday 12 August 2025 | 1:00 pm AEST





New Levy Management

Why should I register for this session?

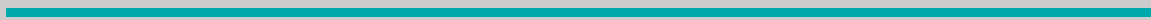
The first release of the **Levy Management re-write** is here — and it's a must-attend session for all users involved in levy setup and processing as these changes will impact your day-to-day tasks.

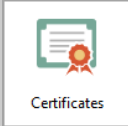
In this session, we'll walk you through the all-new **Levy Management** icon and we'll also preview changes across related areas, including configuration screens that pave the way for smarter levy notice handling. From manual levy entry to budget-based creation, this update simplifies the global levy process.

Topics covered:

- Overview of the new look Levy Management.
- Manual and Budget-based levy creation.
- Levy Invoice Code Setup new fields.
- Approving and distributing Levy Notices.
- Viewing and drilling into lot-specific levies, including paid dates.
- Editing, deleting, or reversing levies.
- Merge Levy Notice Setup.

Wednesday 13 August 2025 | 11:00 am AEST





Certificates

Why should I register for this session?

With certificate requirements varying by state, it's more important than ever to feel confident in your data and your process. This session will show you exactly where your certificate data is coming from, how to ensure its accurate and compliant, and how to customise outputs for each building with ease.

We'll also explore time-saving tools like **Info Editor**, and cover the steps for attaching additional documents, setting up electronic seals, and merging data into certificates. If you work with building records, compliance documents or certificate requests—this session is a for you!

Topics Covered:

- How building information easily assists with generating state-specific certificate types.
- Managing contacts using applicant maintenance, and cover letters for certificate delivery.
- Using Info Editor for building-specific or global overrides.
- Merging data from registers into certificate templates.
- Applying electronic seals and setting sealing clauses.
- Attaching relevant documents to meet state compliance.

Thursday 14 August 2025 | 11:00 am AEST



