

Training Newsletter May 2026

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Welcome to our
TRAINING NEWSLETTER

May 2026

Welcome to our May Newsletter!

There is plenty happening this month, with several upcoming improvements shaped directly by feedback from our recent creditor invoice webinar. These sessions help us understand what matters most to you, and the changes planned for upcoming versions are a great example of that, including:

- A new Manual Entry flag in the DocMax Invoice section. When ticked, manually entered invoices will be excluded from the bulk "Auto Create All" work queue process.
- Bill to Owner has been enhanced to include second debtors.
- A new "Lock Last Year Transactions" field to support periods where financials have been finalised and are awaiting auditor and or AGM approval. When enabled, creditor invoices cannot be saved to the prior financial year.

If you missed the webinar, you can catch up using the link below.

The first stage of our Arrears Management enhancements is also just around the corner, so be sure to join our preview session later this month.

StrataMax Webinar Videos

You'll find last month's webinars available for viewing at your convenience on our

[StrataMax Videos page](#)

[Ledger Card | Back to Basics \(26 minutes\)](#)

[New Creditor Invoices \(29 minutes\)](#)

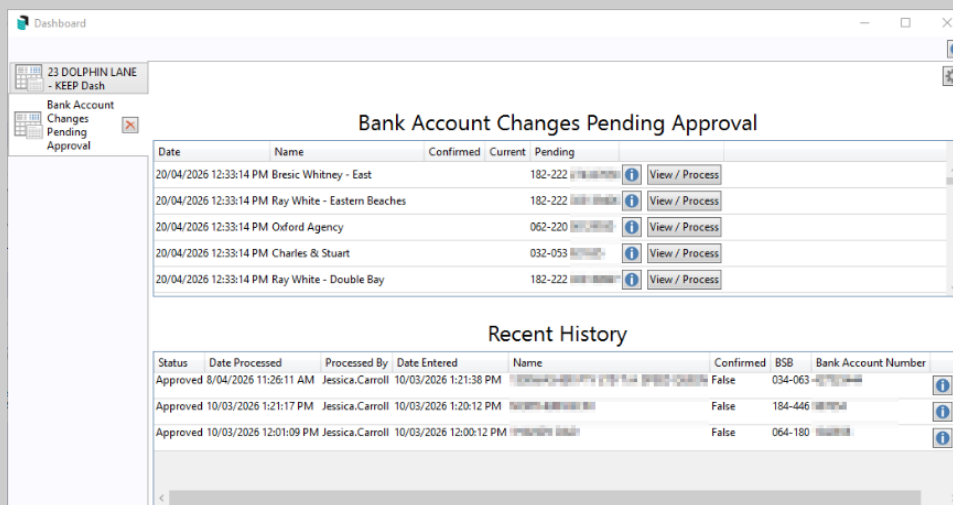
[DocMax | Smarter Searches, Smoother Workflows \(20 minutes\)](#)

Protecting Building Payments

To help protect building funds against growing cyber-crime and payment redirection fraud, we now offer a **Bank Account Change Approval process**. Any new or changed creditor bank details are automatically placed on hold and **cannot be paid until independently verified and approved**. This ensures funds are only released once bank details have been confirmed directly with the supplier, dramatically reducing the risk of fraudulent or incorrect payments.

Why this is important:

- Payments are automatically **stopped** until bank details are verified and approved.
- **Independent confirmation** with suppliers helps prevent cyber and email-based fraud.
- Supporting documents and **time-stamped audit trails** provide transparency and accountability.
- **Separation of duties** ensures no single person can change and approve bank details.
- A dedicated dashboard gives clear visibility over all pending and approved changes.



The screenshot shows a dashboard interface with a sidebar on the left containing navigation options: '23 DOLPHIN LANE - KEEP Dash', 'Bank Account Changes Pending Approval', and 'Approval'. The main content area is titled 'Bank Account Changes Pending Approval' and contains two tables.

Date	Name	Confirmed	Current	Pending	
20/04/2026 12:33:14 PM	Bresic Whitney - East	182-222			View / Process
20/04/2026 12:33:14 PM	Ray White - Eastern Beaches	182-222			View / Process
20/04/2026 12:33:14 PM	Oxford Agency	062-220			View / Process
20/04/2026 12:33:14 PM	Charles & Stuart	032-053			View / Process
20/04/2026 12:33:14 PM	Ray White - Double Bay	182-222			View / Process

Status	Date Processed	Processed By	Date Entered	Name	Confirmed	BSB	Bank Account Number	
Approved	8/04/2026 11:26:11 AM	Jessica.Carroll	10/03/2026 1:21:38 PM	[REDACTED]	False	034-063	[REDACTED]	View / Process
Approved	10/03/2026 1:21:17 PM	Jessica.Carroll	10/03/2026 1:20:12 PM	[REDACTED]	False	184-446	[REDACTED]	View / Process
Approved	10/03/2026 12:01:09 PM	Jessica.Carroll	10/03/2026 12:00:12 PM	[REDACTED]	False	064-180	[REDACTED]	View / Process

Watch our short video [here](#)

Building Health Report

Building Health Report – At a Glance

The Building Health Report provides clearer visibility into a building's financial position and key compliance indicators, helping managers quickly identify risks and stay on top of obligations. With flexible reporting fields and clear visual alerts, the report supports more proactive financial oversight and compliance monitoring.

- Selectable fields include **Term Deposit details** and **GST Registered status**.
- GST Registered status can be monitored alongside **Annual Levies** to support ATO threshold compliance.
- Buildings highlighted in **red** indicate potential financial risk where available funds may not meet short-term obligations.
- Investment balances are calculated only from accounts configured as **investment accounts in Bank Account Setup**.

The screenshot shows a software window titled "Building Health - SKYLINE III - KEEP 260309". It features a search interface with the following filters:

- Restrict To:** Annual Levies This Year Budget (Condition: is greater than or equal to, Value: 145000.00)
- Sort Order:** GST Registered (Condition: is equal to, Radio buttons: Yes, No)
- Advanced:** Building Number (Condition: is any of)

Summary: Annual Levies This Year Budget is greater than or equal to 145000.00, Sorted By Calculated Balance below Zero True First, Building Name A to Z, Limited to 10,000 records. 3 records displayed.

Building Numl	Building Name	Last Levy Date	Next Levy Date	Next Levy Value	Total Arrears 30 Days	Number of Lots	Building Current Year End
260309	SKYLINE III - KEEP	01/05/2026	01/05/2026	40,000.03	25,007		31/01/2027
10364	GLENMORE ROAD 176	01/03/2026	01/06/2026	194,927.14	15,761.1570		30/06/2026
74857	KOWLOON CENTRE KEEP	01/01/2026	01/07/2026	242,550.00	0.0020		30/09/2026

Buttons at the bottom: Print, Load/Edit/Delete Search, Save Search, Save Search As, Close.

Read more about the Building Health Report [here](#).

Activity Report / Annual Summary

Why should I register for this session?

With reporting obligations differing across states and increasing expectations around transparency, this session introduces a powerful new Activity Report / Annual Summary designed to meet legislative and operational reporting needs. You will see how this report brings key activity and financial information together in one clear summary, using configurable KPI tiles drawn directly from StrataMax activity such as Emails Sent, Work Orders Issued and Recoveries Added. This session is ideal if you want to deliver professional, consistent reports with less manual effort.

Topics Covered

- Activity Report / Annual Summary configuration and key use cases.
- Expense Summary setup using Global ranges and Building override ranges.
- Understanding the value of KPI tiles and how they enhance reporting insights.
- Learn how to produce and distribute Activity Reports and Annual Summaries, plus create additional reports and merge letters using Report Distribution.

Wednesday 20th May 2026 – 11:00am

REGISTER
NOW 

Meeting Hub | Secret Ballots & Voting

Why should I register for this session?

We are very excited to present this webinar to cover secret ballots and votes in Meeting Hub! Here we will introduce you to all the new functions and features, with a focus on collecting votes while ensuring such votes remain anonymous, and providing returning officers with the required information.

Topics Covered

- Setting up motions for Secret Votes.
- Enabling Secret Voting in VoteMax.
- How Secret Voting works in the Attendance Register.
- Secret Votes in the meeting notice and minutes.
- Working with Returning Officers.

Tuesday 26th May 2026 – 1:00pm

REGISTER
NOW 

Arrears Management | Coming Soon

Why should I register for this session?

Arrears Management is moving to Report Distribution. Discover how the latest enhancements to Arrears Management can give you greater control of the arrears process. In this session, we'll show you exactly what's changed, why it matters, and how to use these updates and improve consistency across arrears processing.

Topics Covered

- A walkthrough of the redesigned Arrears Notice Setup screen.
- New flexibility in arrears fee setup, including options to charge fees to the building only where required.
- How to run the Levy Arrears Report.
- Reporting on Global Debtors for lots set to No Send Arrears/ Arrears Notice Disabled.
- How arrears notices are now issued via the Report Distribution interface.
- How to check logs.

Thursday 28th May 2026 – 11:00am

REGISTER
NOW 

WE ARE HERE TO HELP

Training Team

For guidance in mastering the software, helping train new staff or upskilling employees.

Email : training@stratamax.com Phone : 07 5575 7422, select options 1, 2

Support Team

For software queries to be logged, assigned and attended by a consultant.

Email : support@stratamax.com Phone : 07 5575 7422, select options 1, 1

StrataPay/StrataCash Team

For queries relating to account opening and closing, direct debits or other banking enquiries.

Email: service@stratacash.com

Phone : StrataPay - 1300 135 610, select option 1 Phone : StrataCash - 1800 656 368, select option 3

ACCESS ONLINE HELP ANYTIME

Online Help

Please send through any suggestions on content that you would like to see presented to training@stratamax.com



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