

Outlook Add-in

Last Modified on 29/09/2026 9:45 am AEST

This page introduces our exciting new Outlook integration, delivered through the latest Outlook add-in. Designed with a fresh, modern look and enhanced functionality, this new experience brings powerful tools right into your inbox.

Launching in Q4 2026, the updated Outlook add-in will streamline the way you manage emails, making everyday tasks faster and more intuitive. With improved usability and smarter features, you'll be able to stay organised, respond efficiently, and get more done directly within Outlook.

Best of all, the new add-in works independently of StrataMax being installed on your device. This means you can access key functionality from virtually anywhere - whether you're working remotely, on a different workstation, or on the go - giving you greater flexibility and uninterrupted productivity wherever Outlook is available.

Upload to DocMax

Replacing the current functionality that has been available in the Outlook add-in; the changes will see a fresh new interface along with options to upload the email &/or attachments to **DocMax** while being able to select from profiles so that the documents are filed as required in DocMax. Your five most recently used profiles will display at the top of the profile list for quick selection.

The screenshot displays an Outlook email client interface. The main pane shows an email from Craig Jeffcoat (craig.jeffcoat@gmail.com) with the subject "[Ext] Roll Update and Levy Query". The email body contains a caution message: "CAUTION: This email originated from outside of the organization", followed by "Hi ABC Strata" and a request to confirm lot balance changes. A PDF attachment, "Roll Update Confirmation.pdf" (866 KB), is visible. The right-hand sidebar shows the "StrataMax Outlook Addin" interface. It includes a "Logout" button, a "Drive" section with a dropdown menu showing "Testing 5.6 Sql Server", an "Upload Profile" section with a dropdown menu showing "Correspondence", and an "Email Message" section with a toggle for "Include Email". Below these is a section for "Attachments (1 of 1 selected)" showing the "Roll Update Confirmation.pdf" file. At the bottom of the sidebar is a button labeled "Upload Email + 1 Attachment".

Contacts

When composing emails, use the Contacts add-in to search and select from all contacts within your StrataMax database rather than having to manually locate them in StrataMax and copy and paste. Search an individual contact or if emailing the committee or owners simply use the quick recipients option, select the building and choose between Committee or Owners.

Additionally, the Contacts add-in is a useful tool for when you receive an email from someone that forgets to provide enough context for you to understand what building they are associated. Simply click on contacts and StrataMax contacts will be searched to identify who they are and provide details including residential address, contact details and what current positions they hold. The add-in can also be pinned to your Outlook UI so as you move between emails the contact will automatically be identified.

[Ext] Levy balance



craig jeffcoat <[redacted]@hotmail.com>
To Craig Jeffcoat



Fri 19/06

Retention Policy L3 - Permanently Delete - 10 Years (10 years) Expires 16/06/2036

StrataMax Contact: Craig Jeffcoat [Dismiss](#)

Action Items

+ Get more add-ins

CAUTION: This email originated from outside of the organization

Hi ABC Strata

Can you let me know what my account balance is and details of any upcoming levies for my lot.

Thanks

Craiggo

StrataMax Outlook Addin (BETA)

Craig Jeffcoat

RESIDENTIAL ADDRESS

11 Smith Street
BEVERLEY WA 6304

EMAIL ADDRESSES

General [redacted]t@hotmail.com

POSITIONS

Owner of lot 9 in 2025 STRATAMAX
 ONLINE HELP Keep
Account: 02100009

Office bearer in 2025 STRATAMAX
 ONLINE HELP Keep

Close



Building Info

Get instant access from Outlook to key building information using the Building Info add-in. Using the email address, buildings are identified based on positions held allowing you to then preview a summary of the building including address, building type, account manager, financial summary, officer bearers and upcoming meeting dates.

[Ext] Levy balance



craig jeffcoat <[redacted]@hotmail.com>
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Craig

StrataMax Outlook Addin (BETA)

Building Info

Logout

From: [redacted]@hotmail.com

Testing 5.6 Sql Server

1 building(s) linked to this email

2025 STRATAMAX ONLINE HELP

Keep

Owner of lot 9 in 2025 STRATAMAX ONLINE HELP Keep

ADDRESS
12 Frank Street
BELMONT VIC

10 lots QLD / B.F.P. Accommodation

ACCOUNT MANAGER
Lana Clarke

Financial Snapshot

Cash at Bank

\$850

Unpaid Invoices

\$5,644

OFFICE BEARERS
Luna Skies (CHAIRPERSON)
Craig Jeffcoat (SECRETARY)

UPCOMING MEETINGS
AnnualGeneral 23 AUG 2026



Documents

When composing emails, use the Documents add-in to attach documents from **DocMax** to your email.

Use the title, category and lot filters to quickly locate the documents you require and then simply attach to the email with a click of the button. In addition, documents can be downloaded directly from the Documents add-in if required.

Quickly view your assigned tasks from **Task Management** using the My Tasks add-in, update the task status directly from the add-in which will update the task in Task Management.

 Task details  

Insurance Due Today
 **30 Jun 2026**  Medium priority

Not started

▼



BUILDING
  TOWER 3 KEEP

ASSIGNED TO
 craig.jeffcoat

CATEGORY
 Building Insurance

CREATED
15 Apr 2026

CREATED BY
System

AI Assistant

This will initially be released as a preview feature, and is subject to change.

Use the AI Assistant directly from the Outlook add-in to query a wide range of data available in StrataMax to assist with emails and if required compose new emails or draft replies for you.

My Assistant

Craig Keep

354235 - Craig Keep



How can I help?

What would you like to know about **Craig Keep**.

Draft a reply

Building

Lot Balances

Committee members

Type a message...

Assistant

Craig Keep

Craig Keep



Can you draft a reply and include his account balance info?

2:24 PM

Dear Craig,

Thank you for your email and for providing the roll details confirmation. I appreciate you reaching out to us.

Regarding your query, I have checked the account balance for your lot. Here are the details:

- Current Account Balance:** \$5,904.21
- Overdue Amount:** \$5,080.25

It appears that there is an overdue amount on your account. If you

Type a message...

Assistant

Craig Keep

Craig Keep

Who are the current lot owners and when did they become an owner?

2:26 PM

Here is the information about the current lot owners of "Craig Keep" and when they became owners:

Lot Owner	Acquisition Date
Craig Jeffcoat	01 Jul 2023
STRATAMAX PTY LTD	01 Dec 2024
Craig Jeffcoat	04 Dec 2024
Craig & Kahlia Jeffcoat	19 Mar 2026

If you need further details, feel free

Type a message...