Live Sessions

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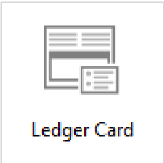
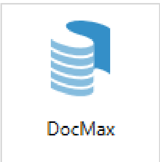
	New Creditor Invoices	**Wednesday 15th April 2026 – 11:00am**
	Ledger Card: Back to Basics	**Wednesday 22nd April 2026 – 11:00am**
	DocMax: Smarter Searches, Smoother Workflows	**Thursday 23rd April 2026 – 1:00pm**

Welcome to the Live Sessions page. Here you can access this month's webinar information and registration links, as well as recordings of sessions delivered over the past twelve months.

You may also register to receive the Monthly Training Newsletter, which we recommend subscribing to for updates on new features, upcoming enhancements, and additional training resources. To subscribe, simply email the StrataMax Training Team.

March 2026

Building Information: In Depth Video (29 minutes)

This webinar covers a more in-depth analysis of the ***Building Information*** screen, using customisation based on user and company requirements, along with a demonstration of the powerful search functionality, new fields and reporting.

Practical Banking Skills Video (40 minutes)

This session helps you confidently manage real-world banking scenarios across your portfolio and reviews ***Process Bank Statements***. Learn how to handle manual allocations, returned payments, ATO refunds, and key configuration settings, while working through common and uncommon exceptions to streamline your ***Bank Reconciliation*** process.

Merge Letters, Report Distribution & Labels (30 minutes)

This session, delivered in March 2026, explored the recent updates to correspondence delivery, focusing on how the Roll, Merge Letters, and Report Distribution now work together using the new contact delivery preferences. Learn how to set preferences once and have them flow consistently through their merge letters, exported recipient lists, which can be used for third-party purposes like Outlook emails and Word label printing.

February 2026

Invoice Hub Approval Process Video (22 minutes)

The updated StrataMax Invoice Hub, released in January 2026 is designed to make invoice approval faster, clearer, and more intuitive for committee members and approvers. The new interface offers improved visibility, streamlined communication, and easier access to historical data—making the approval process more efficient than ever.

This webinar covers the *online invoice approval process* for committee members who have been set up to approve invoices.

Building Transfers Made Easy: A Practical How To Session (41 minutes)

Our *Building Transfers Made Easy* webinar delivered a fast, practical walkthrough of the full transfer process — from understanding transfer codes to actioning the Transfer In Checklist with confidence. We covered key steps like creditor and account maintenance updates, GLMax imports for management fees, and quick DocMax cleanup wins, wrapping up with tips to tidy up non-critical tasks for a smooth, stress-free transfer.

What's New & What's Next | Early 2026 Enhancements (27 minutes)

Our What's New & What's Next webinar provides aguided walk through of the newest enhancements available in our evolving software suite including Report Distribution improvements, Preview Features and Correspondence Preference Enhancements.

January 2026

Ready to Resubdivide? Learn the Essentials Before You Begin (47 mins)

This session provides a clear introduction to the resubdivision process and what to consider when adjusting or adding lots within a scheme. It covers how to interpret registered documents and schedules, the value of creating a pre-mapped plan, and the differences between resubdivisions, entitlement changes, and new entitlements. The webinar also highlights the key StrataMax reports that can support accurate planning.

November 2025

Payment Plans (37 mins)

This webinar goes through the purpose-built features in StrataMax that have been designed to help you manage Payment Plans quickly and efficiently. Covering everything you need to know about getting started with configuration and setup, as well as tips on how to manage and automate parts of the process.

Mastering Report Sets in StrataMax (37 mins)

This webinar explores how to use Report Distribution effectively across multiple areas. You'll learn how to create a ***Merge Letter*** welcome pack with a temporary custom email and access these documents in ***Stored Reports***. The session also covers reviewing ***Ledger Card***, using *Preview Features*, and running internal report sets for key tasks such as financial year-end, auditor reviews, and search agent reports.

October 2025

Levy Management – Updates & Enhancements (42 mins)

We revisit key ***Levy Management*** processes in StrataMax, with a focus on recent enhancements driven by your feedback. We cover essential tasks such as adding levies from a budget or manually, producing levy reports, and managing the global generation and distribution of levy notices. You'll also see how to view and re-issue stored levy notices. Whether you're new to the process or looking to refine your workflow, this session offers practical guidance and helpful demonstrations.

Contact Management & Roll (43 mins)

This session covers essential processes, including issuing ***Certificates***, updating the ***Roll***, preparing meeting minutes, and sending levy notices. It also provides tips for searching contact details such as names, phone numbers, and email addresses. Specific scenarios—like roll reports for search agents, lost buildings, and welcome letters—are demonstrated to show how to complete them. Finally, the session includes guidance on using ***Contact Management*** to clean and update contact records.

September 2025

The Power of the StrataMax Chatbot (36 minutes)

Discover how our AI StrataMax Chatbot can transform the way you deepen your knowledge and get assistance for StrataMax. In this first ever webinar, you'll learn how to get instant, accurate answers to your questions, streamline your workflows, and empower your team with 24/7 training assistance. Whether you're new to AI or looking to sharpen your skills, this webinar will show you how to make the most of this unique and powerful service.

Meeting Hub | The New Attendance Register (25 minutes)

In this webinar we provide a more in-depth look at the refreshed Attendance Register in Meeting Hub. Designed to make managing attendees and their votes quicker and easier than ever, with bulk updating, automatic syncing with StrataMax, and more! Learn how to effortlessly use this refreshed, intuitive screen to save your business time and resources.

August 2025

Certificates (38 minutes)

In this webinar, we explore how to produce certificates using the Report Distribution screen, while making the most of report sets, document inclusion, and Info Editor tools. The session covers each state's requirements, along with a look at the preview features that allow you to switch between the legacy screen and Report Distribution. We also dive into where the certificate data originates, highlighting key areas such as ***Building Information***, ***Levy Management***, ***Insurance***, registers, and more.

Levy Management (33 minutes)

This webinar introduces the Levy Management changes and demonstrates how to create levies manually or budget based, approve and distribute Levy Notices locally or globally using Report Distribution. We preview Proposed Levy Reports and cover ***Levy Management***, ***Levy Invoice Code Setup***, ***Merge Levy Notice*** and ***New Building (BCMax)***.

Task Management (30 minutes)

This webinar provides a more in-depth view of the ***Task Management*** screen. It covers security permissions, configurations & settings, an overview of the different views and filters, adding and managing tasks, Automated Events and Task Shedules, as well as Quick Tasks.

June 2025

Task Management (33 minutes)

This webinar provided a preview of the then unreleased ***Task Management*** screen. It covers security permissions, configuration and the core features managers used day-to-day. Another webinar delivered in August 2025 covered this screen in more detail.

May 2025

Income Tax (42 minutes)

This session covered the setup and process for the Income Tax Preparation tools—including what the ***Income Tax Report*** looked like, configuring accounts in ***Account Maintenance***, and ways *Report Distribution* and *Searches* streamlined reports for accountants or tax agents. Two common scenarios showed how to handle part-year buildings and accrue transactions such as interest not yet received.

Payment Processing Tips (31 minutes)

This webinar highlighted how to maximise the latest Creditor and Payments features: using ***Search Creditor Invoice Items*** for hold/off-hold, setting bank-account limits with alerts, navigating the ***Invoice Hub***, processing one-off payments and owner reimbursements via ***Payment Entry***, and more.

What’s New (20 minutes)

This webinar outlined the built-in *What’s New* panel, DocMax Outlook add-in enhancements, new Bank Reconciliation validation, the ***Search Creditors*** upgrade and improvements in the ***Communication*** screen.

April 2025

Inspections Register (20 minutes)

This webinar provided a sneak-peek at the overhauled ***Inspections Register*** before public release, outlining new fields, filters and workflows.

Opening Balance Setup Enhancements (26 minutes)

This webinar demonstrated the revamped ***Opening Balance Setup***: single-screen fund view, process-date control, debtor-view invoice codes and a preview-financials option.

March 2025

DocMax Work Queues for Accounts Payable (43 minutes)

This webinar showed how accounts-payable teams could leverage ***DocMax Work Queues*** and Saved Searches to triage invoices quickly, with links to ***Search Creditor Invoice Items***.

Quarterly Release Notes & Enhancements (19 minutes)

This webinar reviewed the latest feature set: Bank Account Setup deposit-slip changes, ***Bank Balances***, automated ***Invoice Hub*** uploads, Roll Submission notice dates and fine-tuning ***Receipt Entry*** auto-posting.

Roll Updates & Maximising Searches (45 minutes)

This webinar presented three real-world roll-change scenarios and showed how to exploit ***Search Roll***, ***Search Office Bearers*** and ***Global Debtors*** for faster data checks.

February 2025

Journal Preparation (37 minutes)

This webinar covered entering journals for accruals and pre-payments via ***Journal Preparation***, plus alternatives using Creditor Invoices, Debtor Adjustments and *Transaction Change Code*.

Status Report (30 minutes)

This webinar explained how to schedule automated Status Reports through ***DocMax*** profiles, set default reports and control recipient lists via ***Office Bearers***.

Searches – Everything You Need to Know (36 minutes)

This webinar dived deep into StrataMax search screens - from single-building look-ups to multi-building advanced searches - and showed how to turn results into desktop dashboards.

November 2024

Meeting Hub – Meeting Lifecycle (55 minutes)

This webinar walked through the end-to-end lifecycle of a Meeting Hub meeting, from creation to closure.

Pro Tips & New Features (27 minutes)

This webinar showcased the latest enhancements in ***Interactive Reports***, *Search Local Accounts*, *Status Reports* and more.