

Live Sessions

Last Modified on 02/10/2025 8:57 am AEST

Welcome to the Live Sessions page where you'll find information about the current month's webinars including their registration links. Further down the page you'll find all the recordings from the previous webinars delivered over the last twelve months.

You can also register for our webinars via the registration links in the Monthly Training Newsletter, which we highly recommend subscribing to as it also has vital information about current and upcoming updates and features, as well as tips, tricks, and other helpful training content. Just [send a quick email](#) to the StrataMax Training Team asking to subscribe and stay up to speed with everything StrataMax!

October 2025

Contact Management & Roll

Why should I register for this session?

Managing contacts has continually evolved in recent years, with new features and improvements added along the way. This session will bring you up to speed on the latest updates in one of the most fundamental areas that every team member relies on.

Whether you're simply looking up phone numbers and email addresses, streamlining correspondence, or cleaning up records, this training will offer something useful for everyone.

Topics Covered

- How to use searches to simplify everyday lookups.
- Maximising the Roll and Other Contacts to send correspondence and levy notices using Report Distribution.
- Choosing the right Roll Report for the job.
- Cleaning and maintaining records with Contact Management tools.
- Best practices for managing Roll Submissions.

Thursday 16 October 2025 | 11:00 am AEST



Levy Management – Updates & Enhancements

Why should I register for this session?

Join our webinar where we'll revisit **Levy Management**. After receiving your valuable feedback, we've prioritised and implemented a range of changes and enhancements to make the process even smoother.

In this session, we'll provide a re-cap of **Levy Management**, highlight the new options introduced from your feedback, and demonstrate key updates including:

Topics Covered

- Adding Levies from Budget or Manually.
- Producing Levy Reports.
- Global Generation and Distribution process.
- Viewing copies of stored Levy Notices.
- Re-issuing Levy Notices.
- Enhancements for Meeting Hub motions that include Levy Management field data.

Tuesday 21 October 2025 | 11:00 am AEST



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 Schedules, 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.