Training Newsletter June 2025

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StrataMax | Welcome to our TRAINING NEWSLETTER

June 2025

Welcome to our Training Newsletter for June.

As the weather cools down, it's the perfect time to cosy up with some fresh learning opportunities from StrataMax. This month, we're excited to bring you a sneak peek of our upcoming Task Management feature—a powerful addition designed to streamline your workflow.

We're also hosting a session focused on the most frequently asked questions across the transaction reporting areas. It's all about giving you smart, time-saving tools to help you find answers fast—and set yourself up for future success.

So grab a warm drink and read on—we've got plenty to keep you productive this winter!

StrataMax Webinar Videos

All of our previous webinars are available for viewing at your convenience on our StrataMax Videos page, so don't forget to check out those if you missed anything!

Payments Processing Tips

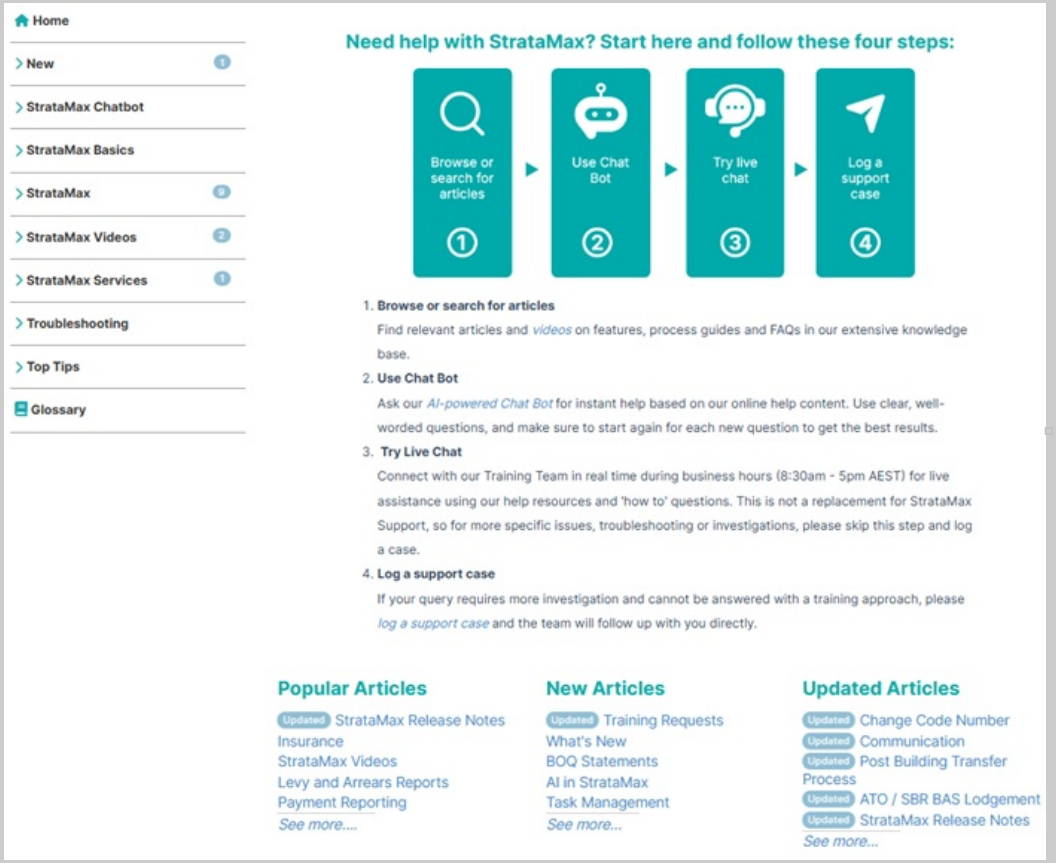
Income Tax Preparation

What's New

Fresh Look, Same Great Help!

You may have noticed we've given our Online Help home page a makeover to make it easier than ever to find the support you need. With a cleaner layout, smarter navigation, and quick links to popular topics, getting help has never been faster or more user-friendly.

Whether you're new to the system or brushing up on a specific process, our updated Help page is your go-to resource — take a look today! (https://smhelp.stratamax.com/help)



Share Your Feedback on New Features

We're introducing a **feedback platform** to gather targeted input on selected new or updated areas of StrataMax. In these areas, you'll see a **"Feedback" button**, which allows you to suggest enhancements to help us improve these new features.

Also, to help shape the evolution of upcoming features, we're making some available in **Preview** — these may be simpler in their initial form and refined in Preview based on your feedback.

Note: This feedback option will only appear in **specific new or redesigned areas**, not across the entire platform.

The feedback feature will be available in the following areas to be released in the coming months:

- Updated Inspections
- Tasks

Your insights in these early stages help us deliver better features, faster.

Local Transactions vs Transaction List

Based on your feedback, we're improving Local Transactions. In version 5.6.131, you can now select account codes using the standard selection list, making the process faster and more consistent. Information is available here.

Frequently Asked Questions – Searches and Transactions

If you're looking to sharpen your skills in locating transactions and uncovering insights quickly, this session is for you. We'll walk through practical tools and answer common questions that can streamline your day-to-day transactional work. Whether you're reviewing local expenses or pulling reports from the old financial year, you'll learn techniques to save time and increase accuracy.

Topics Covered:

- How to tag a specific set of account codes for fast transaction results.
- Best-practice methods for producing old-year transactions efficiently.
- Using a simplified view to reassign expense codes with fewer clicks.
- Running bank account reports for a single creditor over a selected time frame.
- Accessing creditor invoice data using contractor industry filters.
- Alternative reporting tools to generate meaningful data quickly.

Thursday 12 June 2025 | 11:00 am AEST REGISTER NOW

Task Management (New Feature)

Why should I register for this session?

This webinar will show you a new way to boost your productivity with our brand-new Task Management menu! We've listened, we've innovated, and now we're delivering the intuitive, dynamic solution you've been asking for. Learn how to effortlessly organize your to-do list, collaborating seamlessly with your team, and tracking progress with crystal-clear visibility.

Topics covered:

- How to manage permissions in Security Setup.
- Changing Configurations and Settings.
- Swapping On-screen views and options.
- The ease of adding and managing tasks.

Thursday 26 June 2025 | 1:00 pm AEST 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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