

Training Newsletter Nov 2025

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Welcome to our
TRAINING NEWSLETTER

November 2025

Welcome to our Training Newsletter for November.

November has arrived, and with it comes a renewed focus as we edge closer to the end of the year. Now is the perfect moment to pause, reflect, and sharpen the skills that help you work more efficiently - not harder.

This month, our **Report Sets** session will walk you through powerful configuration options, helping you streamline your processes and make the most of StrataMax's reporting capabilities. The **Payment Plans** webinar will explore how to effectively set up and manage payment plans within the system, to support more efficient handling of owners' levy debts.

Status Reports

With the majority of **investment accounts** now set up in **Bank Account Setup**, it's time to take the next step — we're introducing Maturity Rate and Interest Rate details directly on your **Status Reports**!

This highly requested enhancement comes straight from feedback from **committee members and managers**, making your reports more complete and insightful than ever.

If your investment accounts are already set up in **Bank Account Setup**, there's nothing more you need to do — you'll see the new data on the Status Reports from version 5.6.142.

If not, we recommend adding your investment account information in **Bank Account Setup**. For accounts that don't receive data through a banking download, simply set them up as **Other Investment Accounts**.

Enjoy clearer, more powerful reporting — and keep your committees in the know!

Bank Account Details				
Balance on Statement (as at 30/06/25)	55,996.42			
Unpresented Payments	0.00			
Unpresented Credits	0.00			
Funds Available	55,996.42			
		Maturity Date	Interest Rate	
BANK BALANCE ADMINISTRATIVE				
BANK BALANCE SINKING FUND				
AT CALL ACCOUNT		13/12/25	2.75	
TERM DEPOSIT		18/07/25	4.60	
TERM DEPOSIT		12/08/25	4.20	
TERM DEPOSIT		15/07/25	4.30	
TERM DEPOSIT		15/07/25	4.30	
TERM DEPOSIT		01/09/25	4.35	

Roll Changes				
Date	Change	Lot No.	Unit No.	Name
13/06/25	New Owner	9	7507	Mr. [REDACTED]
13/06/25	New Owner	9	7507	Ms. [REDACTED]

Plan Ahead for the Festive Season

The festive season is just around the corner, and it's the ideal time to get ahead with your holiday communications! Let your owners, committees, and contractors know your office closure dates with ease using StrataMax's built-in tools.

Whether you're sending levy notices, general correspondence, or end-of-year updates, StrataMax makes it simple to include a holiday message:

- Update your **Email Template Manager** to include a cheerful holiday note in outgoing emails.
- Customise your **Message Maker** templates for levy notices with seasonal messaging.
- Add a holiday message to your email signature in **Communication** for consistent, professional updates.

Take a few minutes now to set it all up — so you can enjoy a smooth, stress-free lead-up to the holidays and keep everyone in the loop with festive cheer!

Farewell to the Diary

The end of the year also marks the end of an era — the diary will be officially retired, making way for our powerful new **Task Management** system. This exciting change brings smarter workflows, better visibility, and a more streamlined experience for everyone.

StrataMax Webinar Videos

Missed last month's sessions?

Catch up anytime - recorded webinars are ready in our **Live Sessions** article.

Levy Management – Updates & Enhancements (42 mins)

Contact Management & Roll (43 mins)

Mastering Report Sets in StrataMax

Why should I register for this session?

If you've ever wondered how to make reporting more efficient across multiple buildings, this session is for you. We'll explore the latest enhancements to Report Sets in StrataMax and show you how to unlock the full potential of the cogwheel configuration - giving you greater control and flexibility over both Owner and Internal reports.

Whether you're distributing reports for Auditors, End of Financial Year, Building Handovers and more, there will be a report that suits your requirement with new features available, including selecting multiple owners for report sets. This session will equip you with practical skills to streamline your workflow and boost your confidence.

Topics Covered

- Navigate the Report Distribution window from various access points in StrataMax.
- Create Owner Report Sets that simplify and automate distribution across multiple buildings.
- Configure Internal Report Sets with options for old, current, and combined financial years.
- Locate and resend previously distributed report sets with ease.

Thursday 13 November 2025 | 11:00 am AEST



Payment Plans

Why should I register for this session?

Join this webinar to learn about 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.

Topics Covered

- An overview of Payment Plans and the affected areas in StrataMax .
- Required configuration and setup for Payment Plans.
- Tips on how to manage Payment Plan requests using StrataMax.
- Adding and removing lot owners to and from a Payment Plan (incl. in bulk).
- Recommendations for tracking and reporting payments from owners.

Wednesday 19 November 2025 | 1:00 pm AEST



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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