

# StrataMax Learning Plan - Prompt Strata

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## Your Tailored Training Plan

We're pleased to support you in the next phase of your StrataMax learning journey. As part of this, we have six hours of complimentary training available, which we can tailor together to further develop your skills and confidence.

The session topics outlined below are intended as a guide. We will work with you to prioritise the areas that will deliver the greatest value, aligning the training with your business needs and objectives. To complement these sessions, we may also provide relevant articles and videos from the StrataMax Online Help to support ongoing learning.

Each session can be recorded for your convenience, with secure access links provided following the training. For security purposes, we will request a nominated email address to manage and verify access to these recordings.

Your **personal session links will only be available for 12 months** . If you anticipate needing access beyond this period, please download and retain a copy. Over time, recordings may also become less relevant as the software is updated.

## Training Sessions

### StrataMax Overview and Configuration Review

<b>Date / Time:</b>	<b>Trainer (incl. session link):</b>
<b>Articles:</b>	<b>Videos:</b>
<b>Attendees:</b>	<b>Recording Link:</b>

This session will review the current setup and configuration settings to help provide recommendations to manage your portfolio. Areas to review together - Lost Buildings, Bank Account Setup, Searches, Email Template Manager, etc.

### Bank Accounts & Reconciliation

<b>Date / Time:</b>	<b>Trainer (incl. session link):</b>
<b>Articles:</b>	<b>Videos:</b>
<b>Attendees:</b>	<b>Recording Link:</b>

Review the current setup and configuration and legends.

## StrataMax Online Portal

<b>Date / Time:</b>	<b>Trainer (incl. session link):</b>
<b>Articles:</b>	<b>Videos:</b>
<b>Attendees:</b>	<b>Recording Link:</b>

Review the current setup for the Online Portal. Review display, available StrataMax documents - including Financial Statements with Account Summary. Review DocMax Documents and Groups for display and ordering. Check Committee setup.

## Meeting Hub & Online Voting (VoteMax)

<b>Date / Time:</b>	<b>Trainer (incl. session link):</b>
<b>Articles:</b>	<b>Videos:</b>
<b>Attendees:</b>	<b>Recording Link:</b>

Review the existing template setup, including motions, formatting, merge fields, etc.

## Optional Other Topics to consider

- **New Building & Building Information**
- **Roll and Contact Management**
- **Levy Management**
- **Levy Arrears and Debt Collection**
- **Financial Reporting, Budgets**
- **GST / PAYG / BAS and Income Tax**
- **Financial Period End Reporting and Adjustments**
- **Merge Letters**
- **Creditors and Payments (recommended for new creditor invoices)**
- **Management Fees and Additional Recoveries**
- **Certificates and Property Reports**
- **Inspections and Registers**
- **DocMax**
- **Quotes / WorkOrders and Reporting (TaskMax)**
- **Insurance & Claims**

## Resources

To support your on-boarding and help you get the most from StrataMax, we encourage you to make full use of the resources below.

- **Scheduled Training Sessions**
- **Live, hands-on sessions (recordable for future reference). Recordings remain available for 12 months—please download if needed long term. We recommend at least two team members attend each session.**
- **Help Chatbot & Live Chat**  
Instant online assistance with links to relevant articles and videos.
- **StrataMax Online Help**  
24/7 access to a full library of help articles and training videos.
- **Monthly Newsletters**  
Regular updates, tips, and free webinars to support ongoing learning.

## Training Sessions - General Q&A

Date / Time:	Recording Link	Brief content summary

## Contact Details

Please contact the team best suited to your query and always CC your Client Services Manager, on all emails.

### Client Success Manager

**Name:** Nikki Sargeant  
**Email:** [nikki.sargeant@stratamax.com](mailto:nikki.sargeant@stratamax.com)  
**Phone:** 07 5575 7422

### Training Team

*For all training-related enquiries during your official on-boarding period.*  
**Email:** [training@stratamax.com](mailto:training@stratamax.com)

### Support Team

*For all technical queries and support.*

[How to Log a Support Case](#)

Email: [support@stratamax.com](mailto:support@stratamax.com)

## Full Service Team

*For specific requests for completion of work. Charges apply.*

**Full Service Request**

Email: [fullservice@stratamax.com](mailto:fullservice@stratamax.com)

## StrataPay / StrataCash Management

*For all bank StrataCash (BOQ) / StrataPay account-related queries.*

Email: [service@stratacash.com](mailto:service@stratacash.com)

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