

Outlook Add-in

Last Modified on 24/06/2026 9:57 am AEST

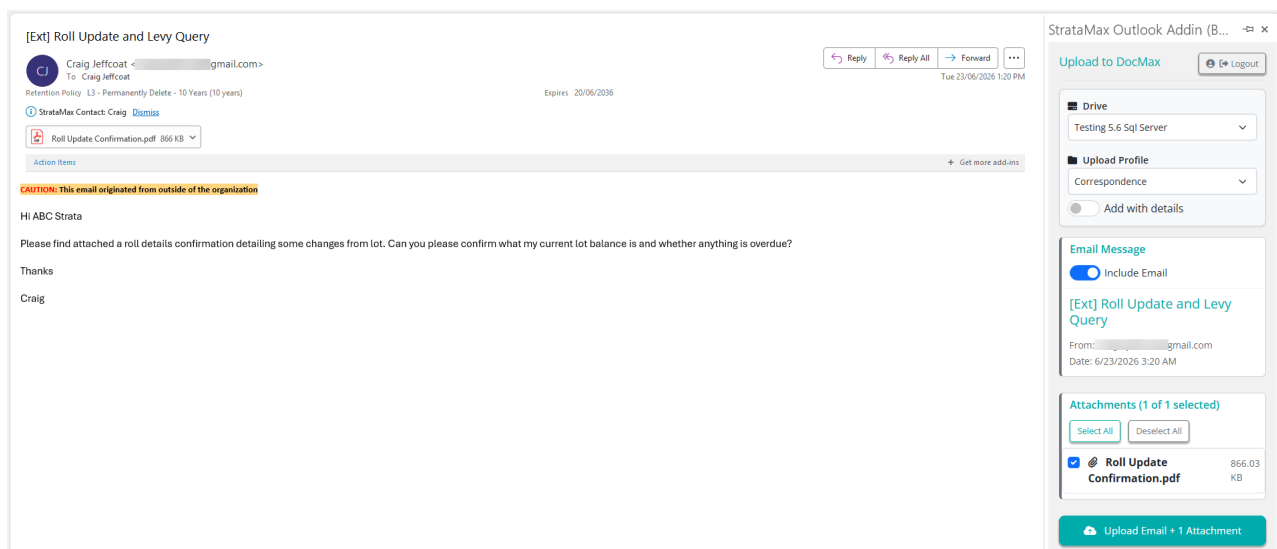
This page introduces our exciting new Outlook integration, delivered through the latest Outlook add-in. Designed with a fresh, modern look and enhanced functionality, this new experience brings powerful tools right into your inbox.

Launching in Q3 2026, the updated Outlook add-in will streamline the way you manage emails, making everyday tasks faster and more intuitive. With improved usability and smarter features, you'll be able to stay organised, respond efficiently, and get more done directly within Outlook.

Best of all, the new add-in works independently of StrataMax being installed on your device. This means you can access key functionality from virtually anywhere - whether you're working remotely, on a different workstation, or on the go - giving you greater flexibility and uninterrupted productivity wherever Outlook is available.

Upload to DocMax

Replacing the current functionality that has been available in the Outlook add-in; the changes will see a fresh new interface along with options to upload the email &/or attachments to **DocMax** while being able to select from profiles so that the documents are filed as required in DocMax.



The screenshot displays an Outlook email interface. The main email content shows a message from Craig Jeffcoat with a PDF attachment titled "Roll Update Confirmation.pdf" (866 KB). A sidebar on the right, titled "StrataMax Outlook Addin (B...)", features an "Upload to DocMax" button and a "Logout" button. Below these are sections for "Drive" (Testing 5.6 Ssj Server), "Upload Profile" (Correspondence), and "Email Message" (Include Email). The "Attachments" section shows the selected PDF file. At the bottom of the sidebar is a button labeled "Upload Email + 1 Attachment".

Contacts


When composing emails, use the Contacts add-in to search and select from all contacts within your StrataMax database rather than having to manually locate them in StrataMax and copy and paste.





Send To: Craig Jeffcoat <[redacted]@hotmail.com>
Cc: [redacted]
Subject: [redacted]








Regards,



Craig Jeffcoat
National Strata Business Consultant
StrataMax Pty Ltd

e: craig.jeffcoat@stratamax.com
t: 07 5575 7422
w: www.stratamax.com



StrataMax Outlook Addin (B...)

Contacts Logout

Compose mode — search and add recipients

Testing 5.6 Sql Server

Craigo Search

Added Craig Jeffcoat to TO

1 contact(s) found

Craig Jeffcoat
[redacted]@hotmail.com To Cc Bcc

Additionally, the Contacts add-in is a useful tool for when you receive an email from someone that forgets to provide enough context for you to understand what building they are associated. Simply click on contacts and StrataMax contacts will be searched to identify who they are and provide details including residential address, contact details and what current positions they hold. The add-in can also be pinned to your Outlook UI so as you move between emails the contact will automatically be identified.

[Ext] Levy balance



craig.jeffcoat <[redacted]@hotmail.com>
To: Craig Jeffcoat



Fri 19/06

Retention Policy L3 - Permanently Delete - 10 Years (10 years) Expires 16/06/2036

StrataMax Contact: Craig Jeffcoat [Dismiss](#)

Action Items

+ Get more add-ins

CAUTION: This email originated from outside of the organization

Hi ABC Strata

Can you let me know what my account balance is and details of any upcoming levies for my lot.

Thanks

Craigo

StrataMax Outlook Addin (BETA)

Craig Jeffcoat

RESIDENTIAL ADDRESS

11 Smith Street
BEVERLEY WA 6304

EMAIL ADDRESSES

General [redacted]@hotmail.com

POSITIONS

- Owner of lot 9 in 2025 STRATAMAX
- ONLINE HELP Keep
Account: 02100009
- Office bearer in 2025 STRATAMAX
ONLINE HELP Keep

Close



Building Info

Get instant access from Outlook to key building information using the Building Info add-in. Using the email address, buildings are identified based on positions held allowing you to then preview a summary of the building including address, building type, account manager, financial summary, officer bearers and upcoming meeting dates.

[Ext] Levy balance



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Craig

StrataMax Outlook Addin (BETA)

Building Info

Logout

From: [redacted]@hotmail.com

Testing 5.6 Sql Server

1 building(s) linked to this email

2025 STRATAMAX ONLINE HELP

Keep

Owner of lot 9 in 2025 STRATAMAX ONLINE HELP Keep

ADDRESS
12 Frank Street
BELMONT VIC

10 lots QLD / B.F.P. Accommodation

ACCOUNT MANAGER
Lana Clarke

Financial Snapshot

Cash at Bank

\$850

Unpaid Invoices

\$5,644

OFFICE BEARERS
Luna Skies (CHAIRPERSON)
Craig Jeffcoat (SECRETARY)

UPCOMING MEETINGS
AnnualGeneral 23 AUG 2026



Documents

When composing emails, use the Documents add-in to attach documents from **DocMax** to your email. Use the title, category and lot filters to quickly locate the documents you require and then simply attach to the email with a click of the button. In addition, documents can be downloaded directly from the Documents add-in if required.

The screenshot shows an Outlook email window. The main pane displays an email with a subject line, a 'Send' button, and a document attachment titled 'AGM Minutes 17_03_2026.pdf' (120 KB). The email body contains a signature for Craig Jeffcoat, contact information, and logos for StrataMax, StrataCash, STRATAPAY, and StrataLoans. A sidebar on the right, titled 'StrataMax Outlook Addin (B...)', shows a 'Documents' section with a search bar containing 'minute' and a list of documents, including the attached 'AGM Minutes 17_03_2026.pdf'.

Create Task

Create tasks in **Task Management** directly from outlook using the *Create Task* add-in. The interface will allow assigning the task to specific users, setting the priority and due date as well as entering a detailed description.

[Ext] Certificate Request

The screenshot shows the header of an email from 'craig.jeffcoat@hotmail.com' to 'Craig Jeffcoat' at 1:54 PM. It includes a retention policy notice and an 'Action Items' bar with a '+ Get more add-ins' button.

CAUTION: This email originated from outside of the organization

Hi ABC Strata

I am in the process of selling my apartment and would like to request a certificate to pass onto my real estate agent, can you please prepare one and send it to me asap.

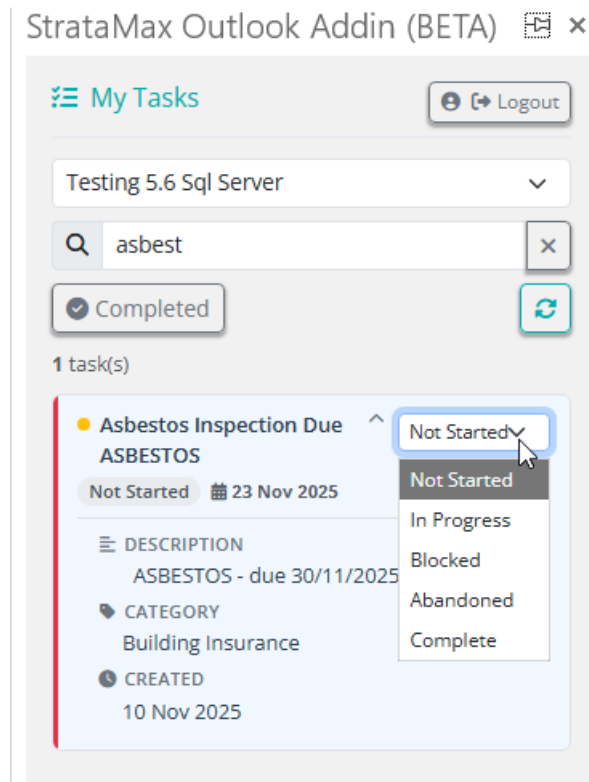
Thanks

Craig

The screenshot shows the 'StrataMax Outlook Addin (BETA) Create Task' interface. It features a dropdown menu for 'Testing 5.6 Sql Server', a notification 'Creating task from: [Ext] Certificate Request', and fields for 'Title' (set to '[Ext] Certificate Request'), 'Building' (set to '2025 STRATAMAX ONLINE HELP Keep'), and 'Assigned To' (set to 'Kate'). The 'Priority' section has buttons for 'Low', 'Medium', and 'High'. The 'Due Date' is set to '30/06/2026'. The 'Description' field contains the text: 'Prepare a section 33 certificate and email to the owner.' At the bottom, there is a 'From:' field showing 'hotmail.com' and a large '+ Create Task' button.

My Tasks

Quickly view your assigned tasks from **Task Management** using the My Tasks add-in, update the task status directly from the add-in which will update the task in Task Management.



AI Assistant

This will initially be released as a preview feature, and is subject to change.

Use the AI Assistant directly from the Outlook add-in to query a wide range of data available in StrataMax to assist with emails and if required draft reply to emails for you.

The AI Assistant will have security to allow offices to restrict access for users if required.

