

Training Newsletter July 2026

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Get the most out of StrataMax - July 2026



Welcome to our
TRAINING NEWSLETTER

July 2026

Welcome to our July edition of the Training Newsletter!

Help us help you! We have been working hard behind the scenes to bring you the most comprehensive, up-to-date, accurate resources.

Our webinars will be paused for this month, so now is a great time to explore StrataMax Online Help and strengthen your skills in finding the information you need.

Online Help and Chatbot Enhancements

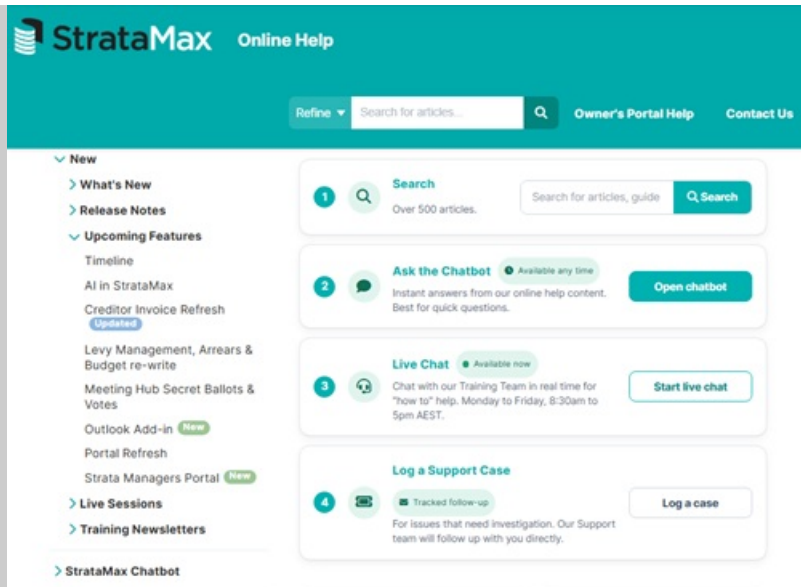
We have enhanced our [Online Help](#), articles, and FAQs to give you quick, convenient access to the answers you need, 24/7.

Our [Chatbot](#) is even smarter, trained on over 500 of our online help articles. The more specific your question, the better it can pinpoint the answer, and it does the legwork for you.

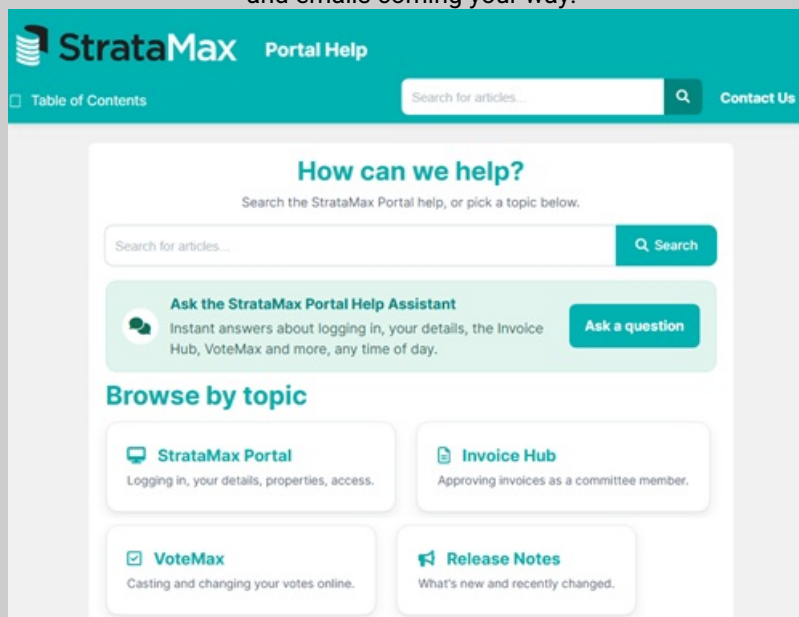
Put Chatbot to work on Searches

[Searches](#) are one of the most powerful features in StrataMax, with over 30 search screens covering everything from levies and payments to contracts, insurance and work orders. They all share the same layout, so once you know one, you know them all. You can restrict results to exactly the records you want, choose and reorder your columns, sort to suit, then switch to [Grouped View](#) to summarise large datasets at a glance, with no need to export first. Save your favourites to reuse anytime, or pin them to your Dashboard.

That is a lot of capability, and it is exactly where Chatbot earns its keep. Tell it the result you want, and it gives you exact, step by step instructions, the precise search to open, the fields and conditions to set, and the columns to display, so you get the data you need first time. Need something more advanced? Ask it how to report on grouped data, such as total unpaid invoices by creditor or closed work orders by building, and it will show you exactly how to build it.



We've brought Chatbot to the Owners Portal too. The [Owners Portal Chatbot](#) gives your Owners and Committee a smart, self-service way to find answers in moments, reducing the phone calls and emails coming your way.



StrataMax Webinar Videos

If you missed our last month's webinars, or want to revisit, you'll find them available on our [StrataMax Videos page](#)

[Meeting Hub | Secret Ballots & Voting \(29 mins\)](#)
[Master Levies from Budget to Approval \(24 mins\)](#)
[Communication Tips & Tricks \(35 mins\)](#)

New Creditor Invoices

From **v5.6.157 onwards**, all users will have access to the refreshed **Creditor Invoices** experience — designed to make invoice processing faster, clearer, and easier to manage.

View the [Creditor Invoices – Release Notes](#), articles and webinar which are all the tools to get you started.

New Articles

- [Creditor Invoice Work-Queues](#)
- [Creditor Invoices \(Preview\)](#)
- [Search Creditor Invoice Items](#)
- [Scheduled Creditor Invoices](#)
- [Creditor Invoices | FAQ](#)

Webinar

- [New Creditor Invoices](#)
-

Hot Tips direct from the Training Team

Welcome Letter – Time to Review!

If it has been a while, ensure that you have the welcome letter setup in Merge Letters to advise the Owner of the email address on the Roll to create their portal account – it should not be often that the StrataMax User ID and Password are required – remove these from the initial merge letter.

Find our StrataMax Intro Letter article with a Sample Welcome Letter [here](#).

Check your Building Health and add to your Dashboard

The **Building Health Report** is a great portfolio overview – add it to your Dashboard to see:

- Cash at Bank / Investment Balances
- Unpaid Creditors / Debtors
- Next Due Insurance and Levy Dates

Activity Report / Annual Summary

A relatively new report that can be added to report sets or any area that uses Report Distribution is the **Activity Report / Annual Summary**. This report provides a summary of the selected building for data for a specific period. All presented with an easy to read report which includes many summary metrics i.e. Cash balances, income and expenditure, work orders, invoices, levies etc.

Owners Tax Year Report

Preparing to issue the **Owners Tax Year Report** in July – the owner preferences are set in the Roll, and the report is issued using [report distribution](#).

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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