

Training Newsletter October 2026

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Get the most out of StrataMax - October 2026



StrataMax

Welcome to our
TRAINING NEWSLETTER

October 2026

Welcome to October. This is an important month for several different reasons:

- RBA mandated surcharging changes take effect – 1st October 2026.
- New Creditors, Debtors, Arrears move to new only options from version 5.6.164.
- Upcoming changes are being shown in October webinars – Managers and Owners Portal plus DocMax Add-In and recently delivered Debtor Invoice enhancements.

Please keep reading – all the important details are below.

StrataMax Webinar Videos

Missed our previous sessions or want to revisit any, you'll find them [here](#)!

[Creditor Invoices Through to Payment \(35 mins\)](#)

[Meeting Hub & VoteMax Secret Voting \(25 mins\)](#)

[What's New? Recent Tips & Updates \(23 mins\)](#)

IMPORTANT - StrataPay Card Changes – effective 1st of October.

If you are a **StrataPay client**, StrataPay buildings set to 'StrataPay Card Enabled – Yes' will still allow card payments, and charges will now be paid by the building.

Please review our [StrataPay article](#) for more details.

Please take the time to review your portfolio setup, paying particular attention to those that are enabled and will start to incur charges. Discuss with your team or administrator if needed.

- To identify the current StrataPay configuration for buildings and determine their card payment status, use [Search Buildings](#).
- Add the restrictions for StrataPay Card Enabled = Yes, and add both that and StrataPay Card Decision Date as columns to display.
- Additional columns and restrictions can be added as required. If this information will be used for regular reporting, remember to save the search configuration for future use.

The screenshot shows the 'Search Buildings' window with the title 'Search Buildings - 24 UNICORN ROAD - KEEP 9681'. The window includes a 'Restrict To' section with a 'Field' dropdown set to 'Building Number', a 'Condition' dropdown set to 'is equal to', and an empty 'Value' field. Below this, the 'Columns' section shows 'Building Number' selected. The 'Sort Order' section shows 'StrataPay Card Enabled' selected with a condition of 'is equal to' and radio buttons for 'Yes' (selected), 'No', and 'Not Set'. The 'Advanced' section is collapsed. Below the search criteria, it states 'StrataPay Card Enabled Yes, Sorted By Building Name A to Z, Limited to 10,000 records' and '3 records displayed'. The results table has four columns: 'Building Number', 'Building Name', 'StrataPay Card Enabled', and 'StrataPay Card Decision Date'. The table contains three rows of data.

Building Number	Building Name	StrataPay Card Enabled	StrataPay Card Decision Date
9503	23 DOLPHIN LANE - KEEP	☒	05/09/2026 12:00 AM
9728	25 RED BARON WAY - KEEP	☒	29/09/2026 12:00 AM
74857	KOWLOON HARBOUR KEEP	☒	22/08/2026 12:00 AM

NEW Creditor & Debtor Invoices plus Arrears Management

As part of our ongoing commitment to improving StrataMax, the legacy options for these areas are being retired and you may notice, if you haven't already that these may no longer be available if you are on version 5.6.164 or higher.

The enhancements in these areas have been available for some time, with supporting articles, process documentation and webinars on [StrataMax Online Help](#).

This transition allows us to reduce reliance on legacy code and focus on delivering future enhancements, improved performance, and new capabilities across StrataMax.

Resources to assist:

<u>Articles</u>	<u>Webinar</u>
• Creditor Invoice Work Queues • Creditor Invoices	• Work Queues to Transactions • Invoices to Payment
• Debtor Invoice and Printing plus Scheduled Debtor Invoices	• Debtor Invoice session coming later this month - register below.
• Arrears Management • Arrears Notice – using Report Distribution	• Arrears Management

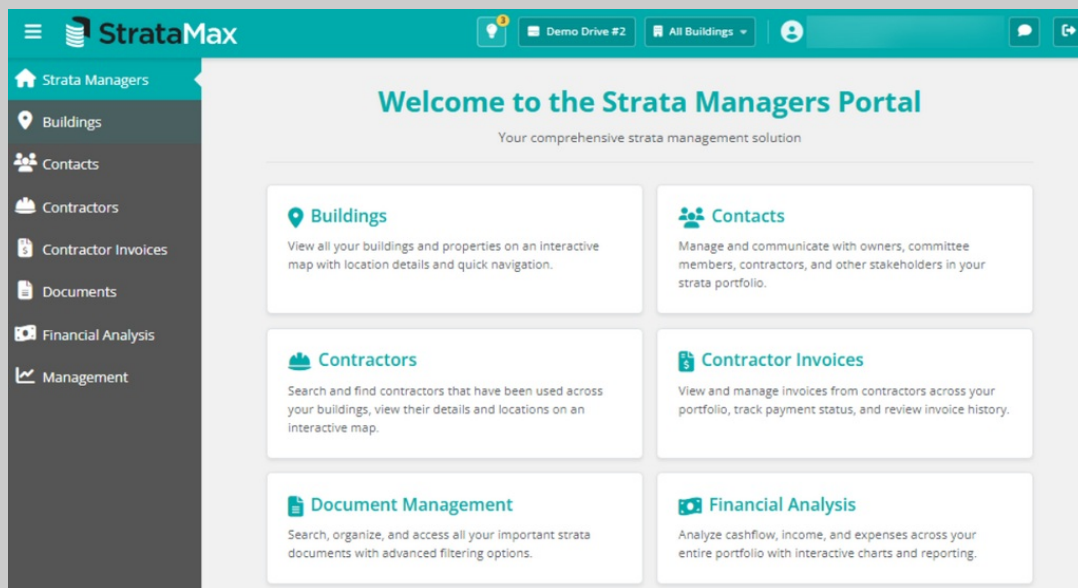
If, after reviewing the available resources, you experience any issues or require assistance, please contact support@stratamax.com.

NEW Strata Manager's Portal & Outlook-Add In

The updated **DocMax Outlook add-in** will help you work more efficiently from your inbox. The integration supports DocMax uploads, contact and building searches, document attachments, new task management, and AI-assisted email drafting, all without requiring StrataMax to be installed on your device.

Take StrataMax beyond the office with the new **Strata Managers Portal**. Designed exclusively for Strata Managers, this powerful new platform provides fast, secure access to key building information, contacts, financial data and DocMax documents directly from your web browser or mobile device. Whether you're in a meeting, on-site, or handling an after-hours enquiry, the information you need is always at your fingertips.

Register for our webinar this month for an exclusive preview and live demonstration of the Portal's features.



Strata Managers Portal & Outlook Add-In (coming soon...)

Why should I register for this session?

Introducing the new Managers Portal and Outlook Add-In, designed to provide easier access to key StrataMax information, anywhere, anytime, on your laptop, mobile and no need for access to StrataMax.

Join us for a first look at how you can view building and contact information, search for documents, upload emails to DocMax and manage tasks.

Topics Covered

- Access key StrataMax information anywhere.
- Direct integration with StrataMax contacts, including using the AI Assistant to assist with composing emails.
- Task Management including creating and reviewing existing tasks.
- View building, contact, financial and DocMax data.

Thursday 15th October 2026 – 11:00am AEST



NEW | Debtor Invoices

Why should I register for this session?

Discover the new Debtor Invoice experience, designed to make invoicing faster and more efficient. Join us as we explore the refreshed interface and new automation features including future invoicing that help reduce manual processing and improve visibility of debtor information.

Topics Covered:

- The new Debtor Invoice (Preview) interface.
- Automating recurring and future-dated debtor charges.
- Editing, reversing, and reprinting debtor invoices.

Thursday 22nd October 2026 – 11:00am AEST



Task Management | Automations and Parent/Child Tasks

Why should I register for this session?

Learn how to automate workflows with the new Automations screen, create Child Tasks, use Task Templates, and clone existing automations for greater efficiency and consistency.

We'll also cover enhanced calendar and visibility features, updated security permissions, and practical examples to help improve task ownership, accountability, and productivity across your daily operations.

Topics Covered

- Using the new Automations.
- How the new Parent and Child task feature looks and behaves.
- Creating and managing Parent and Child Tasks.
- Create and apply Task Templates.
- Clone and Reuse Existing Automations.

Tuesday 27th October 2026 – 1:00pm 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

Please send through any suggestions on content that you would like to see presented to
training@stratamax.com



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