Training Newsletter November 2026

Last Modified on 03/11/2026 9:38 am AEST

Get the most from StrataMax - November 2026



November 2026

In this month's newsletter, you'll discover how to get the most from the new **Strata Managers Portal and Owners Portal**, along with practical tips and powerful tools to help keep your data accurate and up to date. You'll also see how your **Chatbot** feedback is helping us continuously improve your experience.

Don't miss our upcoming sessions showcasing **Searches**, the **Dashboard**, and more. Simply click the **Register Now** links to secure your place.

StrataMax Webinar Videos

If you missed our previous sessions or want to revisit any, you'll find them here!

Strata Managers Portal & Outlook Add-In (26 mins)

Debtor Invoices (25 mins)

Task Management | Automations, Parent/Child Tasks and Time Entries (40 mins)

Are You Ready for the Strata Managers Portal and Owners Portal?

Get portal-ready for the new Strata Managers Portal and the enhanced **Owners Portal**. A quick review of your StrataMax setup now will help ensure managers, committee members and owners enjoy the best possible experience.

The more accurate your data, the more impressive your portal experience.

Start getting portal-ready by reviewing the key areas below.

- Review and configure your Expense Summary and Cashflow Summary to ensure accurate financial dashboards and reporting.
  - For larger portfolios, use the import function to streamline setup and consider using AI tools to assist with expense categorisation.
- Use the Address Lookup tool to confirm property locations are entered in ***Building Information***. This enables buildings to be displayed on Google Maps within the portal.
- Review ***Security Setup*** settings, available from version 5.6.165, to manage access across the Strata Managers Portal.
- Ensure Investment Accounts ***Bank Account Setup*** are configured correctly, even if they are manually reconciled, so they can be reported through the portal.
- If you do not wish to use the Owners Portal Financial Dashboard, contact your Customer Service Manager to have it disabled. It can also be enabled again in the future.

Data Health Check

It's the perfect time to review some of the key areas within StrataMax that benefit from clean, accurate and well-maintained data. A little housekeeping now can help streamline day-to-day processes, improve reporting and keep dashboards up to date, and ensure you have the right information at your fingertips when you need it most. Below are examples of some of those important dashboards that can help.

Small updates, big operational benefits

Small improvements in these everyday areas can help keep your StrataMax data organised, up to date and working effectively.

- Insurance dashboard which will keep you up to date on any schedules that are pending expiry.
- DocMax - Use Advanced Search to locate and bulk update documents, and apply system categories to improve consistency and integration with other areas of StrataMax.
- Contact Management - Review your contact records and use the available tools to merge duplicate contacts or split contacts where required.
- Email Template Manager - Review and expand your email templates. Additional areas now support Report Distribution, including Debtor Invoices, Ledger Cards and Certificates.

CHATBOT FEEDBACK – THUMBS UP & THUMBS DOWN

The StrataMax Chatbot has quickly become the assistant many users have been looking for, helping answer questions and providing guidance across a wide range of topics. As more users turn to Chatbot for support, your feedback becomes increasingly valuable.

When Chatbot provides a helpful answer, click the 'Yes' thumbs up. If the response misses the mark, use the 'No' button and tell us why. Your feedback helps us identify content that needs improvement, refine existing help pages, and promote the answers that deliver the most value.

A few seconds of feedback can help improve the experience for every StrataMax user.

Search, Find and Stay on Track

Why should I register for this session?

There have been changes to StrataMax searches, along with more ways to bring important information into your Dashboard. Come along to explore the updated search experience, revisit your Dashboard setup and pick up a tip or two to help you find information faster, monitor key areas and simplify everyday portfolio management.

Topics Covered

- Navigate the updated search layout and use restrictions, columns, sort orders and advanced options to refine results, including using the grouped view.
- Use the available conditions to search text, dates, amounts and other fields more effectively.
- Configure Dashboard items, drill down into source data and add eligible saved searches to your Dashboard.
- Create saved searches for Dashboard items, including locating these searches in the search bar.

Thursday 12th November 2026 - 11.00am AEST REGISTER NOW

DocMax | Managing Multiple Document Updates

Why should I register for this session?

When a building transfers or a new building is added to your portfolio, keeping documents organised and uploaded to the StrataMax Portal is essential.

Join us for a demonstration covering key tasks to help you manage documents more efficiently in DocMax, including updating multiple documents, using Advance Search to locate documents, and adjusting Portal Groups for your Owners and Committee to view.

Topics Covered

- Completing post-building transfer tasks in DocMax.
- Using Advanced Search to locate and update documents on bulk.
- Setting documents to upload to the StrataMax Portal.
- Bulk delete.

Wednesday 25th November 2026 - 11.00am AEST REGISTER NOW

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

StrataMax website | Contact Us