DocMax | StrataMax Integration

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This article is designed to be used as a reference guide to all the areas in StrataMax that integrate with *DocMax* and allow document attachment.

We also offer a completely free 'DocMax Basics' online course, which you can enrol ir<u>here</u>! Please see the <u>StrataMax Online Courses</u> page for more details, including the coupon code required to enrol for free.

Building Information

Building Photos and Building Plans can be added to DocMax and viewed directly from the *Building Information* menu. The documents must firstly be saved to DocMax using the appropriate Category for the hyperlink to be accessible from *Building Information*;

- 1. Open DocMax.
- 2. *Add Documents* using your preferred method and save for each property as required with the Category set as either 'Building Photos' or 'Building Plans'.

Building Photos 🔀 Building Plans 🗙

To view the saved documents from StrataMax;

- 1. Search or select *Building Information*.
- 2. Using the search bar type in 'Photo' or 'Plans' for quick navigation to the Building Photos/ Plans field.
- 3. Click on the hyperlink to view the saved record.

Building Information - STRATAMA	X ONLINE HELP 1521	_		×
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View: All Fields 🗸 🖌	Search			Q
Committee	ABC Strata Body Corp. Manager 🁔	☆		^
	Candessa Ashbury Committee Member 🕥			
	Mr Alfie Andrews Chairperson			
	Steven Jobs Building Manager 👔			
Strata Renewal Committee Established	(Not Set)	\Rightarrow		
Interim or Final Occupation Certificate Date	•	\Rightarrow		
Building Photos	Add a photo using the Building Photos category in DocMax	\Rightarrow		
Building Plans	Add a plan using the Building Plans category in DocMax Building Plans Building Plans 11	\Rightarrow		
Bank Accounts	Bank BSB Account Balance SCM 124-367 123456789 39215.81	☆		~
	Notes History Report	Sav	e Cl	lose

Common Property Register

- 1. Open the *Common Property Register* and select one of the items in the list, and the *OK* button.
- 2. Locate field 22; *Doc Id*, and right-click in the cell under the *Data* column.
- 3. When the *DocMax* Select Document window appears, locate the required document and click Select Document.
 - The *Doc ID* field will now have a document ID number.
- 4. Click Save.
- 5. To open the document, simply right-click the ID number.

Common Property Register ROYAL HEIGHTS	\$ 456455	Document View
File Help		Home
Code 00000001	Cc	Preview Save and Open Delete Print Email View Copy to
Name	Data	Layout Document History Buildings
8 Address (1) 9 Address (2) 10 Address (3) 11 Description of Area authorised for use 12 Conditions 13 Conditions 14 Conditions 15 Adjudicator Order to Consent 16 Lot A/c Affected 17 Lot Number Affected 18 Date Authonity Withdrawn 19 Text Description 20 By Law Liability 20 of	306	Document COMMON PROPERTY APPROVAL MOTION EXAMPLE Document Profile Assigned Status Action Da Custom Properties Document Details Property Document I I Building 456455 ROYAL HE Cot Details Owner Category
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Contracts Register

- Open *Contracts* and select one of the items in the list and click*OK* to open the contact, or click the *Cancel* to create a new contract.
- 2. Locate field 31; *Doc ID* and right-click in the field.
- 3. When the *DocMax Select Document* window appears, locate the required document and click *Select Document.*
 - The *Doc ID* field will now have a document ID number.
- 4. Click Save.
- 5. To open the document, simply right-click the ID number.

Contracts Register ROYAL HEIGHTS 456455	Document View
File Help Code 801 Bon Bon Bon Bon Bon Bon Bon Bon	Home Preview Save and Open Delete Print Email View Copy to
Name Data 17 Options	Pane Victory Document History Buildings Layout Document
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21 Date of Withdrawal of Financier 22 Workers Comp Number 23 Termination Date 24 New Entire Research Date	Document Profile Assigned Status Action Da
25 Option Notice Period 26 Last Renewal Date 27 Increase Rate	Custom Properties Document Details
28 Increase Due 29 Expiry Date 30 Common Property Group	Property Document Building 1439 THE OAKES
31 Doc Id 307	Lot Details
29 of 29	Category V V Sales Category V V Category V V V Category V V V Category V V V V V V V V V V V V V V V V V V V

Other Registers

- 1. Open Other Registers.
- 2. *Insert* a register from the *Category* list.
- 3. Populate the *Reference* and *Location* fields, and click *Apply*.
- 4. Click File > Create DocMax Record.
- 5. When the *DocMax Select Document* window appears, locate the required document and click *Select Document.*
- 6. To open the document again, click the *View Doc* button.

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F	ile	Help				
F	1	Create DocMax Record	ference Number to Minut replaceme	e Book for a Building. Enter a ne nt.	w number or select a	
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		Add/Delete Register	Building Number	Register	Category ^	
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Document Amendment Register

- 1. Open *Document Amendment Register*, and locate field 8; Doc ID.
- 2. Right-click the cell under the Data column, and the DocMax Select Document window will appear.
- 3. Locate the amended document and click the *Select Document* button.
 - $\circ~$ The Doc ID field will now have a document ID number.
- 4. Click Save.
- 5. To open the document, right-click the ID number.

Document Amendment Register ROYAL H	EIGHTS 456455	Document View
File Help	Description	Home
	Amenc	Preview Save and Open Delete Print Email View Copy to
Name	Data	Pane Close Document History Buildings
3 Description	AMENDED BY-LA	Layout Document
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7 Register Location	Unsite	
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Common Property Group 6 of 7		Status Rev Action D Custom Properties Custom Properties Property Document Building 456455 ROYA Custom Property Document Ut 264255 ROYA Custom Property Document Building 456455 ROYA Custom Cus
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TaskMax Work Order

- 1. Open TaskMax.
- 2. Open an existing Work Order in the list orcreate a *New Work* Order.
- 3. Under the *Invoice* section, in the bottom left, click in the *Doc ID* field.
- When the *DocMax Select Document* window appears, locate the required document and click the *Select Document* button.
- 5. By clicking in the Doc ID field again, options will appear to View, Clear or Add from DocMax.

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mail veanne.willson@strate	amax.com		Property	Common Property		Dates		Delete
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loc ID			📃 Don't Print	Order on Issue		Extra Attach	ments	Notes

TaskMax Quotes

- 1. Open *TaskMax*, and click the *Show Quotes* button.
- 2. Select the issued quote, and click the *View Doc* button.
- 3. When the *DocMax* Select Document window appears, locate the required document and click the Select Document button.
- 4. Click the View Doc button again to open the document in DocMax again.
 - When *Document View* is selected, the button in *TaskMax* will be greyed out.
- 5. Select *Save and Close* from the *Document View* window.

🔁 Job Management - ROYAL HEIGHTS 456455 158 Princes	P Document View	
File Edit Reports Duotes:	Home	Action
Status Reference Number Quote Number	Preview State and Open Delate Print Frank View Consta	Change Building
A-Sent 00000006 00000002	Pane + Close Document History Buildings Layout Document	Open Job
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	Insurance Renewal 2015 - 2016	Delete Quote
	Document Profile Assigner	Cancel Quote
	Status Finz Action E	Quote Notes
	Custom Properties	View Doc
	Document Details OProperty Document	Show Work Orders
	Building 456455 ROY	Options
	Lot Details	All This Building
<	Owner Category • Insura	View Status
Manager: Lisa McCoustra No of Lots: 38	Title Insurance Renewal 2	
KUYAL HEIGHTS	Description	
	MAXSOFT ACTP 42	

Sinking Fund Forecast

- 1. Open *Budget Update*, Add a new forecast and save the report.
- 2. Then click *File > Add Report to DocMax.*

📄 Si	inking Fund	Forecast					×
File			_				
	Edit Comm	ients	Sinkir	ng Fund Forecas	st		
	Add Report	t to DocMax 📐	ears	Amount	Per Annum	Start Date	
	View DocM	lax Report	1	50000	50000	29/05/20	
	Close						
	Add	Delete	Ed	it	Rep	ort	Close

- 3. A Windows Explorer menu appears to locate and select the report.
- 4. Check the information pre-filled into the Description, Document Title, and Subject fields.

- In the *Send to StrataMax* field, enter a *Y* if the document is being uploaded to the StrataMax Portal, or an *N* if not.
- If a *Y* was entered above, enter the required *Document Group* number (1-9) on the StrataMax Portal, into the *StrataMax Group* field.
- If the report is being uploaded to the Strata Portal, enter the required date to remove it in *Remove from StrataMax* field.

Sinking Fund Fo	ecast Report to DocMax	— ×
Description	Sinking Fund Forecast	
Document Title	Sinking Fund Forecast	
Subject	Sinking Fund Forecast	
Send to StrataMax	Y	
StrataMax Group	1	
Remove from Strata	fax 25/12/21	-
	OK Cancel	
Ent	y Assistant er a date (dd/mm/yy)	Date
		Overwrite

- 5. Click *OK*, and a notification will confirm that the document has been added to DocMax and will display the Doc ID number.
- 6. To view the document, back in the Sinking Forecast menu, click *File > View DocMax Report*.

Sinking Fund Forecast				×
File				
Edit Comments	Sinking Fund	Forecast		
Add Report to DocMax	Years	Amount	Per Annum	Start Date
View DocMax Report	10	2000000	200000	08/05/15
Close				
	Í.			
Add Delete	Edit		Report	Close

Roll Document Attachment

- 1. Open *Roll*, select the required lot from the list, and click*OK*.
- 2. Click the *Change of Details* button.
- 3. Click on the Select button.
- 4. When the *DocMax Select Document* window appears, locate the required document and click the *Select Document* button.
- 5. Click Save.
- 6. By clicking the *View* button, the document will open in DocMax.

Insurance - View Policy

- 1. Open Insurance, select the appropriate policy, and click OK.
 - Generally, the main policy is *901 BUILDING*, and that would be the policy to attach the building's insurance policy document to.
- 2. Click the View Policy button.
- 3. The document will open in *DocMax* along with the document properties.

If a notification appears saying '*No document attached*' then the document hasn't been added to the policy through *DocMax*. How to do this is outlined in<u>this section of the Insurance article</u>.

Insurance Claims - View Claim Document

- 1. Open *Insurance Claims* and double-click the relevant claim from the list of existing claims.
- 2. Click the *Document* button to open the document in *DocMax*.

If the button is clicked, but the document doesn't appear, then it hasn't been added in DocMax. How to do this is outlined in <u>this section of the Insurance Claims article</u>.

Payment Entry

In the Payment Entry screen, there is a *Select Document* button located at the top of the screen, so that an invoice can be selected.

- Payment Entry					_		×
0820 THE GARDEN TAMERS	Date	30/09/2022 🔻	Select Document	Bank Balance: 29,884.27			0
The Garden Tamers	Amount:	0.00					
	ABN:	23 796 421 613					
PO Box 261]	Compliance					
CLIFTON BEACH QLD 4879]	No compliance status found					
]	Valid O Not Valid					
	Payment Entry 0820 THE GARDEN TAMERS The Garden Tamers PO Box 261 CLIFTON BEACH QLD 4879	Payment Entry 0820 THE GARDEN TAMERS Date The Garden Tamers Amount: PO Box 261 CLIFTON BEACH QLD 4879	Payment Entry 0820 THE GARDEN TAMERS Date 30/09/2022 ▼ The Garden Tamers Amount: 0.00 ABN: 23 796 421 613 PO Box 261 CLIFTON BEACH QLD 4879 O Valid ○ Not Valid	Payment Entry 0820 THE GARDEN TAMERS Date 30/09/2022 Select Document The Garden Tamers Amount: 0.00 ABN: 23 796 421 613 PO Box 261 Compliance No compliance status found	- Payment Entry 0820 THE GARDEN TAMERS Date 30/09/2022 ▼ Select Document Bank Balance: 29,884.27 The Garden Tamers Amount: 0.00 ABN: 23 796 421 613 PO Box 261 Compliance CLIFTON BEACH QLD 4879 No compliance status found Image: Valid O Not Valid Not Valid	Payment Entry Payment Entry Payment Entry Date 30/09/2022 Select Document Bank Balance: 29,884.27 The Garden Tamers Amount: O.0 ABN: 23 796 421 613 Compliance No compliance status found	- Payment Entry — 0820 THE GARDEN TAMERS … Date 30/09/2022 Select Document Bank Balance: 29,884.27 The Garden Tamers Amount: 0.00 ABN: 23 796 421 613 PO Box 261 Compliance CLIFTON BEACH QLD 4879 No compliance status found Image: Valid Not Valid