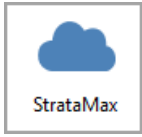


# StrataMax (Menu)

Last Modified on 18/12/2023 5:16 pm AEST



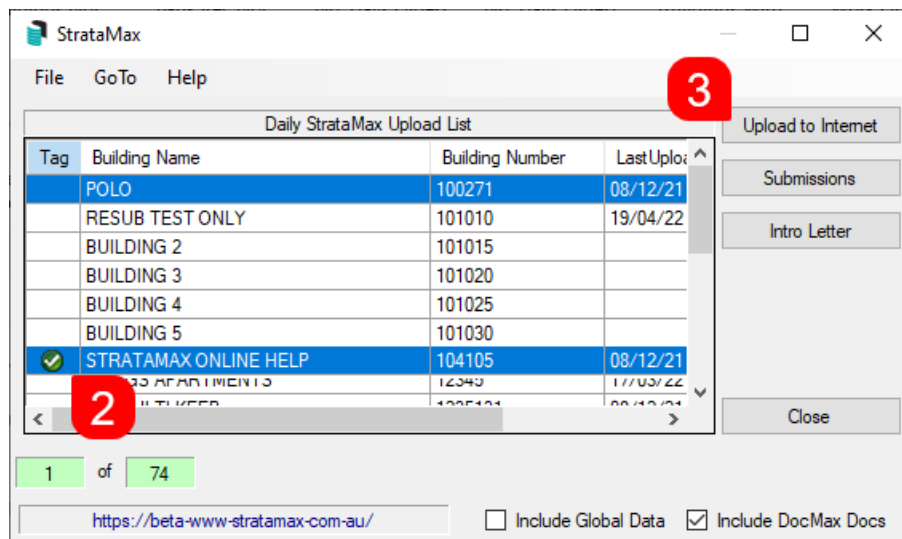
The instructions in this article relate to **StrataMax (icon)**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

This screen manages the building uploads to the StrataMax servers, including DocMax documents to be uploaded to the StrataMax Portal. A StrataMax intro/welcome letter can also be produced from this menu. For those who do use the StrataMax Online Portal, Lot Owners Roll Submissions are also approved and accepted here.

## StrataMax Building Uploads (Upload to Internet)

This button manually uploads building information and documents to the StrataMax servers, including information for *Meeting Hub*. Updates to the *Roll*, *Office Bearers*, and *Building Information* will trigger an upload automatically, whilst changes to levies in *Levy Management* will not trigger an upload automatically.

1. Search or select StrataMax (blue cloud icon).
2. Tag the required building/s.



3. Click the *Upload to Internet* button.

### Include DocMax Docs:

In StrataMax each building has space for documents which may be viewed by owners and other authorised

people. These may be automatically included in the update if the box is checked.

In StrataMax when a building status is changed to 'Lost' or 'Inactive' there is no longer a requirement to notify MaxSoft Admin to stop charging for the building as this information will be uploaded automatically.

## StrataMax Introduction Letter

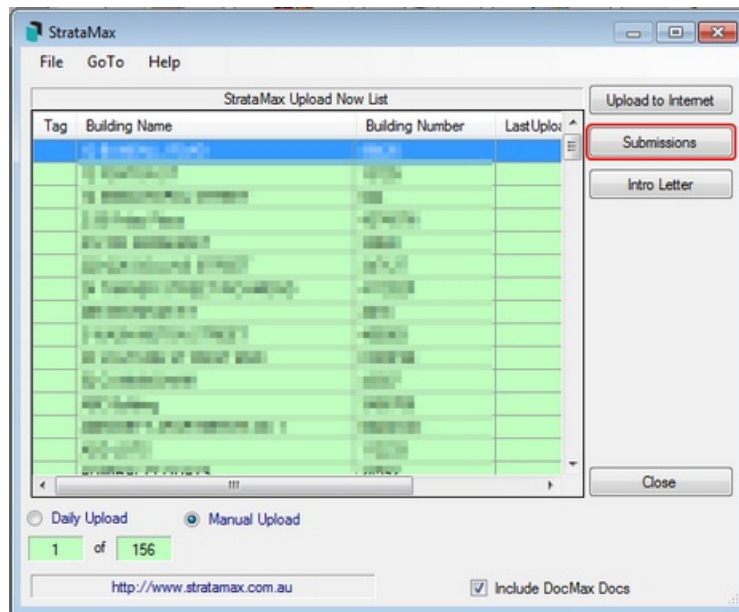
The StrataMax Intro (Introduction) Letter is a feature of StrataMax that has been designed to be sent to owners and committee members with any helpful information required about StrataMax including their access details for the StrataMax Portal. Refer to our article on [StrataMax Intro Letter](#) for further details.

1. Search or select **StrataMax (Menu)**.
2. Click *Intro Letter*, this will open the *Report Distribution* menu.
3. Select the 'Intro Letters' Report Set or if you have not yet configured a StrataMax Intro Letter, follow our instructions in our article for [StrataMax Intro Letter](#).
4. To produce the Intro Letter from the Report Distribution screen follow our instructions for an [example of Welcome Pack](#).

## Managing Online Roll Submissions

Roll Submissions are a change of details that have been submitted by an owner through the StrataMax Portal via the My Info > My Details screen. For lots where there is a single contact on the **Roll**, any Portal account with access to the lot can perform a change of details. For lots that have multiple contact cards, the contact card with the matching email address will be able to submit a change of details. Owners have the option via the StrataMax Portal to;

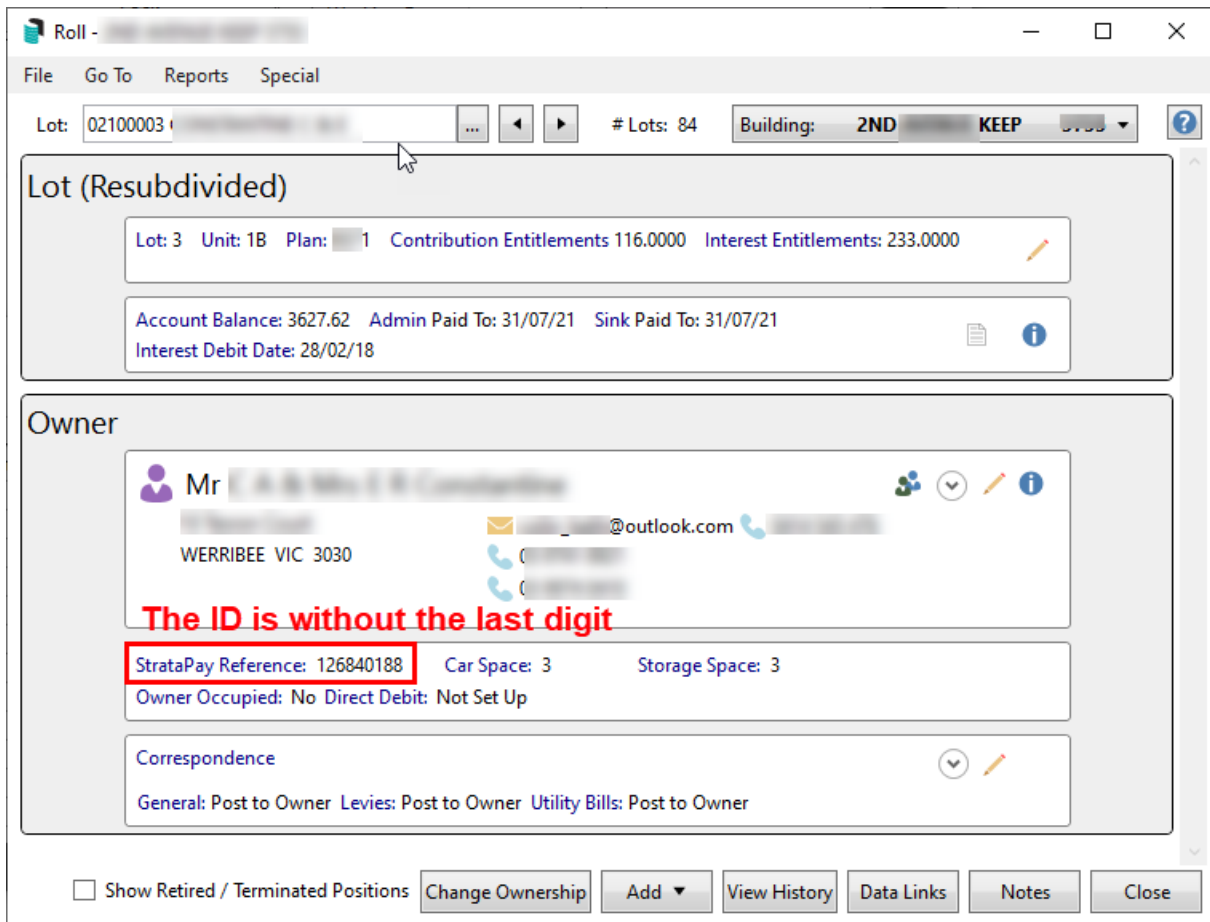
1. Search or select **StrataMax**.
2. Select *Submissions*.



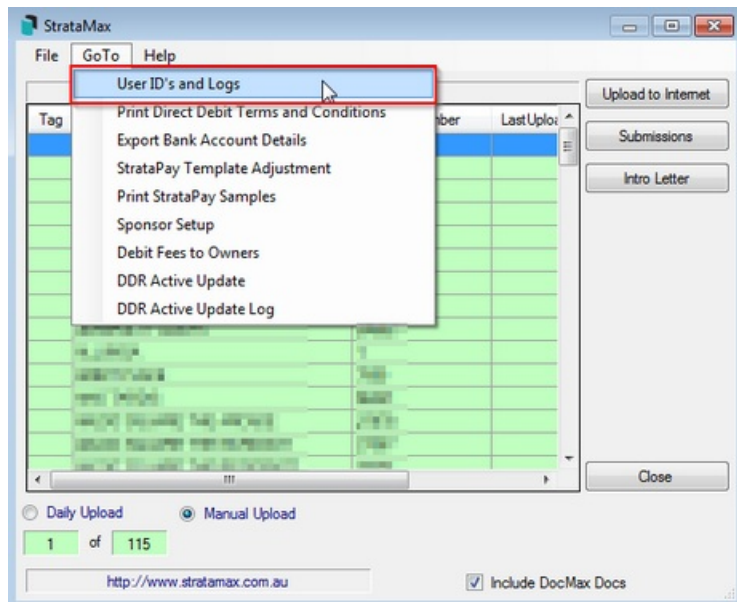
3. Click the appropriate selection to the prompt 'There have been changes of Ownership. Do you want to send introduction letters now?' (Usually *No* if sent as part of a welcome pack or internal process).
4. Refer to our [Roll Submissions](#) article for further details on how to review and accept Roll Submissions.

## Searching for a specific StrataPay Reference Number or StrataMax ID

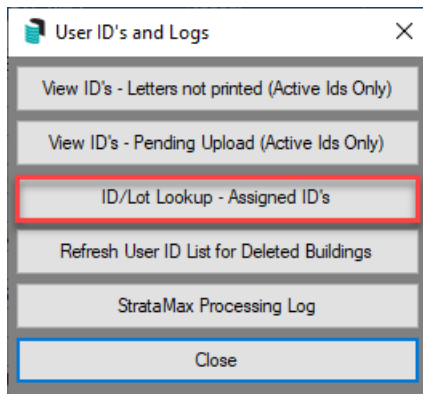
The StrataMax ID that owners use to log into the StrataMax Portal is the same as their StrataPay reference number, without the last digit. If a lot owner knows their StrataPay Reference number, then just tell them this. Or if they don't know their StrataPay reference number or StrataMax ID, you can either find by using the below steps, or by looking it up in the [Roll](#).



1. Search or select **StrataMax**.
2. Select file *Goto > User ID's & Logs*.



3. When prompted 'Do you want to select for one building only?' - Select *No* to access the StrataPay Reference Numbers globally.
4. Select *ID/Lot Lookup - Assigned ID's*.



5. Click on the StrataMax ID field header to sort the ID's in order. Start typing the StrataPay ID in this column to find the required ID. This will define what Building Number and Account Number the Lot Owner belongs to.
6. Close window when completed.

