StrataMax Portal | Introduction & Access

This article introduces the StrataMax Portal, outlining its key features and functionality. It covers managing user accounts for users in your office, and ensuring the right staff members have access to the portal, including creating, modifying, and deactivating accounts as needed. Additionally, it explains how to view the Portal from an owner's perspective, helping managers and administrators understand the owner's experience firsthand.

This section of Online Help also details how to manage non-owner office bearers, ensuring they have the appropriate level of access. Furthermore, it includes instructions on managing principal body corporate logins. A principal body corporate is a specific building type where the buildings themselves are considered the owners rather than individual lot owners. In these cases, a designated representative is granted access to the Portal based on their email address. If this email address requires an update, the *Support Team* will need to assist with this type of request.

> This article is for Strata Managers, and not intended for owners or committee members. We also have the *Owner's Portal Help*, which is designed for owners and committee members, and covers everything they need to know about the StrataMax Portal.

Introduction

The StrataMax Portal is a valuable tool for Strata Management companies. A key benefit is that it allows lot owners of schemes under management access to a range of documentation, including auto-generated StrataMax reports; Sales Certificates and Disclosures Statements for owners who are selling their properties; and additional reports and documents that have been stored in DocMax.

A further benefit is that access to these additional reports and documents by owners or committee members can be configured and, if applicable charges to access specific document groups can be set.

The StrataMax Portal also enables lot owners to update their details online; the changes made are then submitted back to StrataMax which provides the manager with an opportunity to review the changes and confirm the changes to be applied to the Roll records.

In addition, owners with multiple properties can use their StrataMax Portal account to link their

properties to a single access. From this one login, owners can access information for all the properties that they own. owners can also use StrataPay to pay their levy payments.

The StrataMax Portal can be customised with the logo of the Strata Management company and a colour scheme created by using a 'Theme'. This 'Theme' can then be applied to all buildings, or alternatively a 'Theme' created and applied on a per building basis.
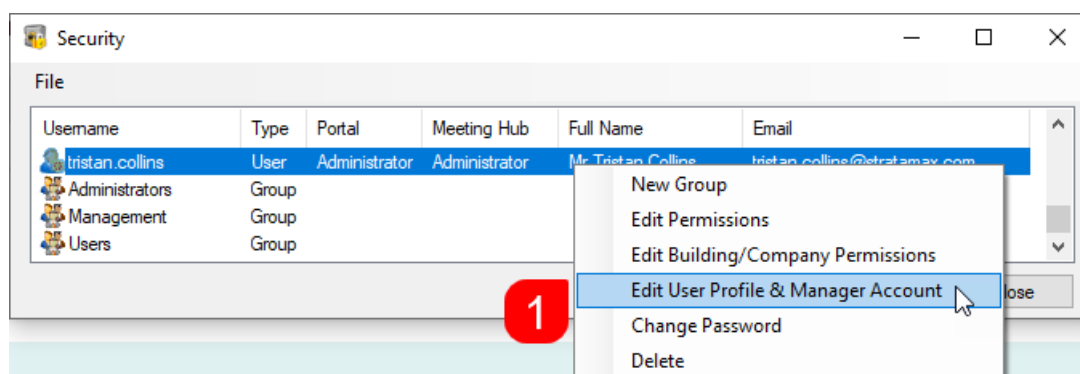
Create a Manager Account

A StrataMax Portal account is required to access the site to set up and maintain the reports and documents groups, which are made available to owners. Each account requires an email address & password, and is linked to the corresponding StrataMax user.

There are two permission levels:

1. *Standard Portal Privileges* gives the user access to the Owner View features, allowing them to view the Portal as a lot owner.
2. *Administrator Portal Privileges* provides access to all areas of the Manager Portal Website, including Report and Document pricing, CMS, and customisation of pages.

Follow these steps to set up Portal access:

1. Search or select **Security Setup**, right-click the user and select *Edit User Profile & Manager Account.*

2. Populate all required fields if not already (see *Edit User Profile & Manager Account*)
3. Click the *Portal* drop-down menu to select the appropriate privileges;
   - *Standard enables the user to view the StrataMax Portal as an owner (see Owner View Access).*
   - *Administrator provides the user with access to the StrataMax Portal enables the user permission to configure the Report and Document groups, and configure customised pages.*
4. Click the *Save* button.

5. An email will be sent to the user's email address with a *CREATE ACCOUNT* button.

Create Account

We have received a request for a new account linked to this email address.

To create an account with this email address, please follow the link below;

CREATE ACCOUNT

If the link does not open it may have been blocked by your browser, please copy the link and paste it into the address bar of your browser.

https://   -stratamax-com-au/Portal/UserSecurity/CreateAccount.aspx?Token=d2cf5303-4e47-489e-a03f-3a343f877546

For security purposes, the above link will expire in 30 mins.

This is a system generated email. Please do not reply directly to this email as it may not be delivered.

6. Click the CREATE ACCOUNT button to open the account creation page.
7. Enter password details and click the *Update* button.

Activate Account

Please set a password to complete activation.

Login: fullservice@stratamax.com.au

New Password: [_____]

Password Strength: [_____]

Confirm New Password: [_____]

☐ I accept the Terms & Conditions

UPDATE

8. The email address and password can now be used to access the StrataMax Online Portal.

Deactivate a Manager Account

If a StrataMax user needs to have their Portal access removed, for example they no longer work for the company, the access can be removed by either setting their StrataMax user to *'No Portal Access'.*

1. Search or select **Security Setup**.
2. Right-click the user and select *Edit User Profile & Manager Account*
3. Click the *Portal* drop-down menu, and select *No Access.*

4. Click *Save.*

Change a Manager Email Address

In some instances, the email address used to access the StrataMax Portal may need to be changed. This can be done through StrataMax by removing Portal access first, updating the address, and then assigning the Portal access again.

1. Search or select *Security Setup*.
2. Right-click the user and choose *Edit User Profile & Manager Account*
3. Click the *Portal* drop-down menu and select *No Access.*
4. Once again, right-click the user and select *Edit User Profile & Manager Account*
5. Update the address in the *Email Address* field.
6. Click the *Portal* drop-down menu to select the appropriate privileges: *Standard* or *Administrator*.
7. Click Save.

StrataMax Portal | Owners, Committee, Non-Owner Office Bearers

When a new building in StrataMax has been installed and the *Roll* created, each lot owner is assigned an initial StrataMax ID and password. We recommend sending these details to owners in an Intro Letter' created in *Merge Letters*.

There is no difference between a Portal account for an owner and a committee member, except that a committee member can access the *Committee Reports and Documents*. For the owner to be granted access to the committee section, they must be added to *Office Bearers* in StrataMax, with their lot number in the *Owner of Lot* field. Only one office bearer account can be granted access to this section, and shared access can be granted for Owner-only access.

Once the StrataMax ID and password have been sent to the owner—most likely via StrataMax Intro Letter—they must create a Portal account. This can be done using the email address recorded on the *Roll* or with this ID and password if it is different. For more information about owners creating an account, refer to the *Creating a StrataMax Portal Account article*.

Specific building types, such as a principal body corporate (PBC), generally include the buildings as the Owners and are managed slightly differently. These buildings will consist of a representative and can also be an Office Bearer. To ensure that these types of individuals can access the Portal, add them as a contact to the Roll and set these representatives in the Office Bearer area as needed to provide portal access. If the email address requires a change or the representative themselves change, it will need support assistance.

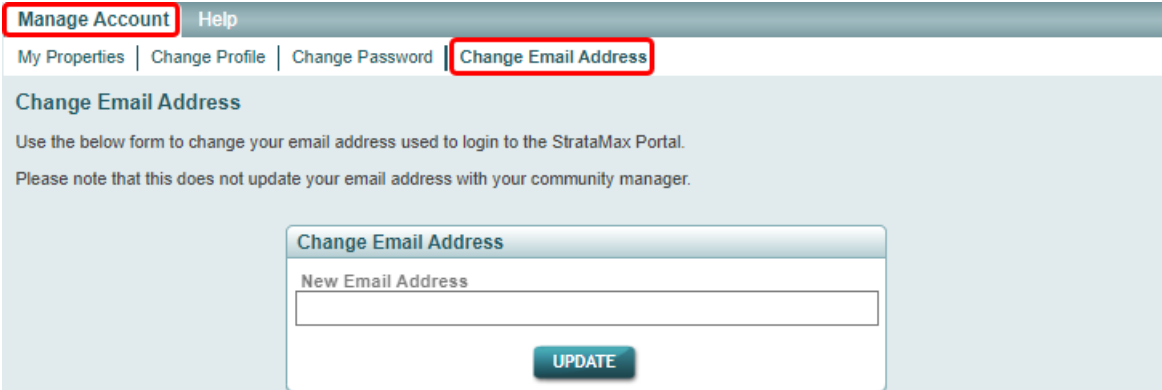Buildings transferred using the *Transfer-In* process will retain the Owner's current login credentials. During the Transfer Out process, login credentials are suspended and will be reactivated once the building has been re-uploaded to StrataMax. The initial login credentials are available to view, but not the owner's current login information.

StrataMax Portal | Non-Owner Office Bearers

Non-Owner Office Bearers are slightly different to owners/committee members as they are not set up in the **Roll** and are therefore not assigned an initial StrataMax ID and password. This means that to gain access to the building's *Committee Reports and Documents* on the StrataMax Portal, they need to be set up in **Office Bearers** as a contact that has the same primary email address as the one they used to create the Portal account.

If Non-Owner Office Bearers need to change their e-mail address, they must do so on the StrataMax Portal, under the Manage Account tab, via the *Change Email Address* menu.

If they no longer have access to the old email address to access their online account, or if it is a different Non-Owner Office Bearer/Caretaker, etc., then you will need to resign them in **Office Bearers** and create a new record for the new email address or Non-Owner Office Bearer. In addition, if the Non-Owner Office Bearer was set up to approve invoices on the **Invoice Hub**, then a new Office Bearer record will need to be added again in **Invoice Hub** > *File* > *Approver Defaults*, which will create and send an email to create a new account.

'StrataPay Only' Setting – Building Information

This field setting is used when you want to exclude one or more plans from your portfolio from accessing the Owners Portal/StrataMax website for any reason. Including this field with a 'Y' (Yes) will prevent the building from being available to view on the Portal and will also affect Invoice Hub approvals.