

# StrataMax Portal | Introduction & Access

Last Modified on 16/02/2026 10:16 am AEST

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.

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## 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 and set up and maintain the report and document groups, which are made available to owners. Each account requires an email address & password, and is linked to the corresponding StrataMax user.

The setup in this area allows the Portal to provide *Office-approved* access to building data and to impersonate Owners or Committee members. Because this account can perform these privileged functions, it **should not** be used for building-specific testing or review.

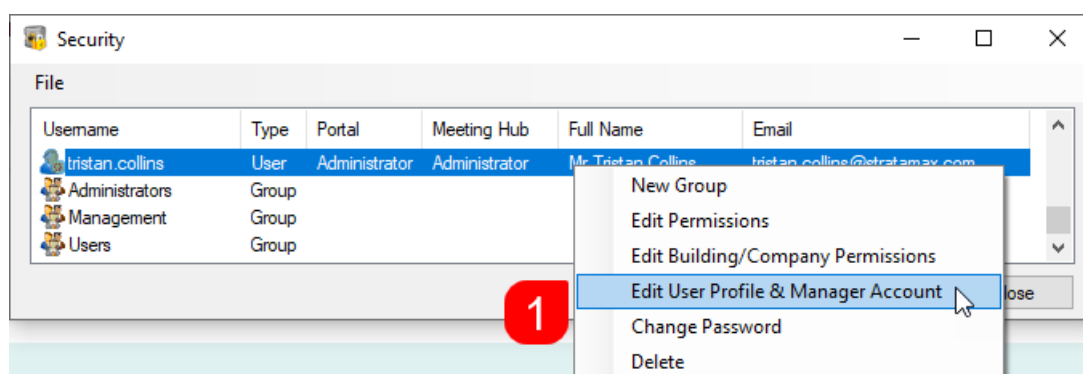
This is especially important when an Owner of a Lot and a Non-Owner access profile are linked to the same account, as this can cause portal conflicts around the office and properties.

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.

The screenshot shows a 'User Profile & Manager Account' window. It contains several input fields and a 'Save' button. Red callout numbers are placed over specific elements: '2' is over the 'Title' dropdown, '3' is over the 'Portal' dropdown in the 'Manager Accounts' section, and '4' is over the 'Save' button.

User Profile & Manager Account			
Username tristan.collins			
Title [v]	First Name Tristan	Surname Collins	Key TC
Email Address tristan.collins@maxsoft.com.au		'Sender' email address used for sending emails if different to account email training@maxsoft.com.au	
Extension [ ]	Department [ ]	Access Code [ ]	
Manager Accounts			
Portal		No Access [v] This user does not have access to this StrataMax Drive & its portfolio of buildings on the Portal.	
Meeting Hub		No Access [v] This user does not have access to this StrataMax Drive & its portfolio of buildings on Meeting Hub.	
			Save

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://\[redacted\]-stratamax-com-au/Portal/UserSecurity/CreateAccount.aspx?Token=d2cf5303-4e47-489e-a03f-3a343f877546](https://[redacted]-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](#).

## Principal Body Corporate (Layered Schemes)

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 who can also be an Office Bearer. To ensure these individuals can access the Portal, add them as contacts to the Roll and, as needed, set them in the Office Bearer area to provide Portal access. If the representative changes, you can manage the change by following these steps, depending on the type of change required.

### Owner Access

If the representative changes, a [change of ownership](#) will be applied to the **Roll**, and the existing building contact will be added back to the Owner area. This will remove the Portal link and allow a new representative to be added. From there, add this representative to the [Office Bearer](#) record to finalise their access.

### Committee Access

If the email address changes, this can be managed by [resigning](#) this record from the **Office Bearers** and [terminating](#) the Representative record in the **Roll**. Once complete, add a new contact for the Representative with their updated information in both the **Roll** and [Office Bearer](#) areas.

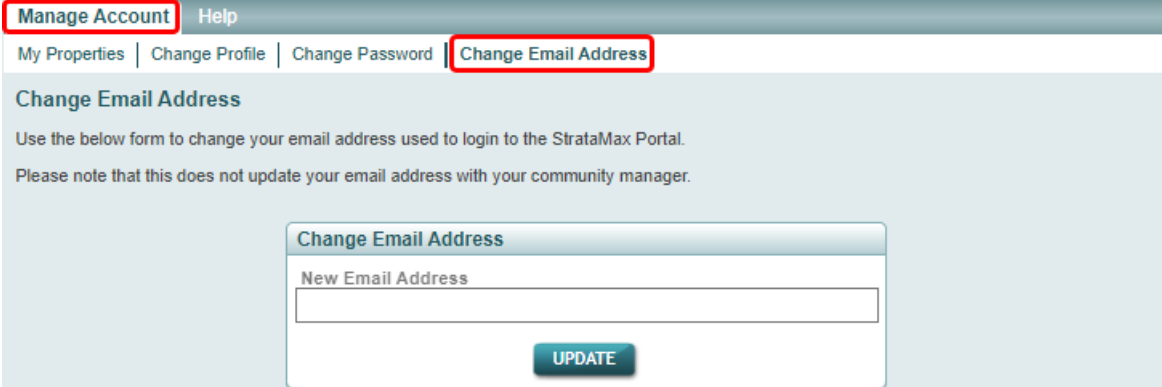
Buildings transferred using the [Transfer-In](#) process will retain the Owner's current login credentials. During the Transfer Out process, login credentials are suspended and will be reactivated once the building has been re-uploaded to StrataMax. The initial login credentials are available to view,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

This access will be automatically granted if the user has an existing StrataMax Portal account. If the user does not have an existing StrataMax Portal account, an email will be sent inviting the user to create an account.

## 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.



The screenshot shows the StrataMax Portal interface. At the top, there is a navigation bar with 'Manage Account' and 'Help' tabs. Below this, a sub-navigation bar contains 'My Properties', 'Change Profile', 'Change Password', and 'Change Email Address'. The 'Change Email Address' tab is selected and highlighted. The main content area is titled 'Change Email Address' and contains the following text: 'Use the below form to change your email address used to login to the StrataMax Portal. Please note that this does not update your email address with your community manager.' Below this text is a form with a title 'Change Email Address' and a label 'New Email Address' above a text input field. A blue 'UPDATE' button is located below the input field.

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.