StrataMax Portal | Owner View Access

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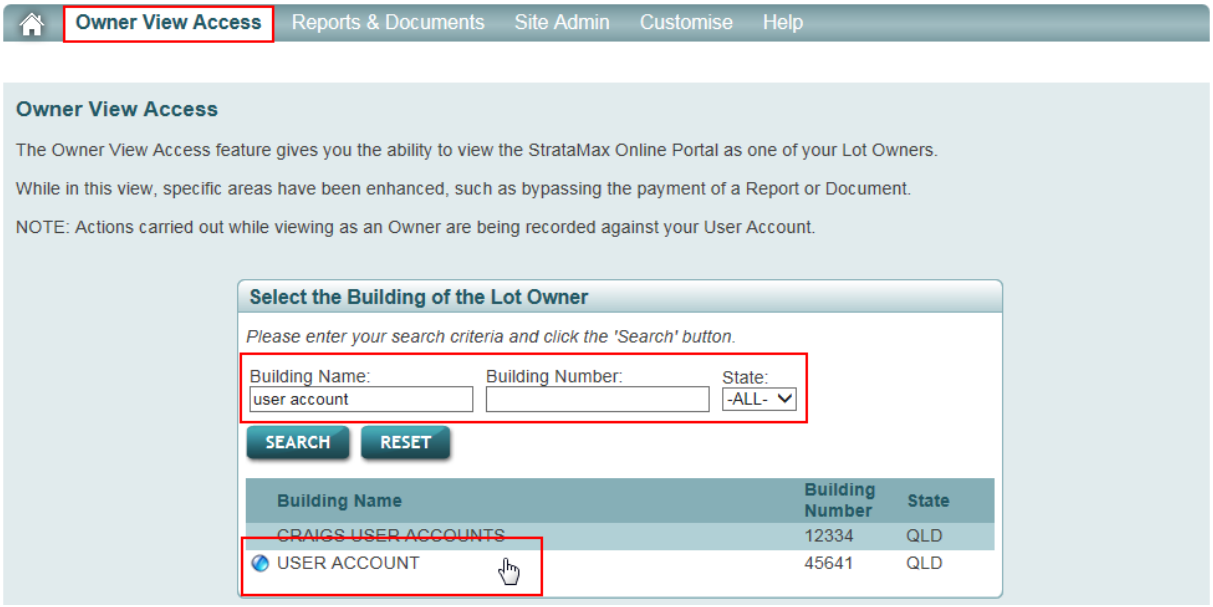
This article covers how Strata Mangers can preview the StrataMax Portal for testing and troubleshooting purposes. This is particularly useful when assisting owners.

If an owner is experiencing issues with or have questions about the StrataMax Portal, they can be referred to the *Owner's Portal Help*, which is designed to assist owners and committee members with everything about the StrataMax Portal.

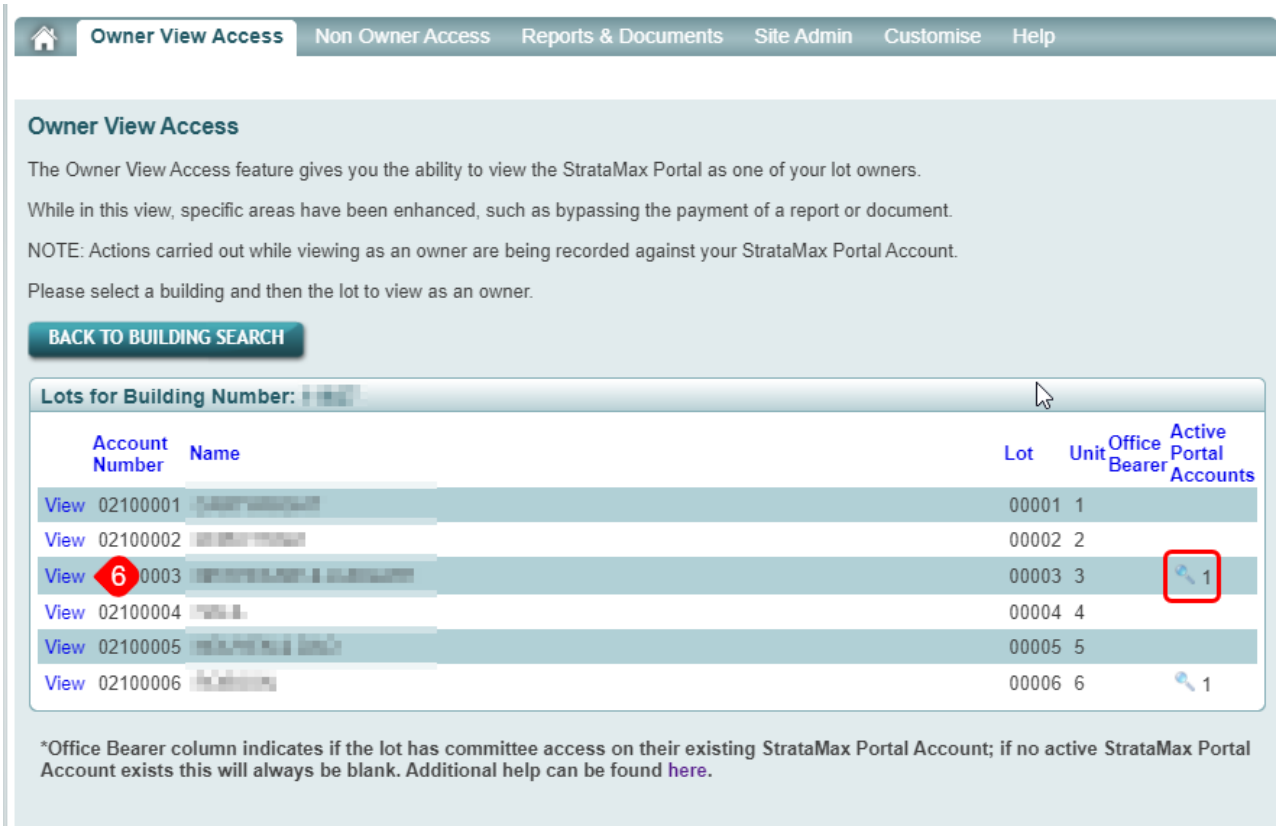
Owner View Access

A manager account with *Standard* or *Administrator Privileges* will grant access to the *Owners View Access* function. This enables managers to impersonate an owner, committee member, or non-owner office bearer and identify what user accounts have been created for each lot.

1. Log into the StrataMax Portal with a manager account with *Admin Privileges*.
2. Select the *Owners View Access* tab.
3. Enter the name or the number of the building to view and click *Search*. This will list the buildings that matches the search criteria.
4. Click on the building name.



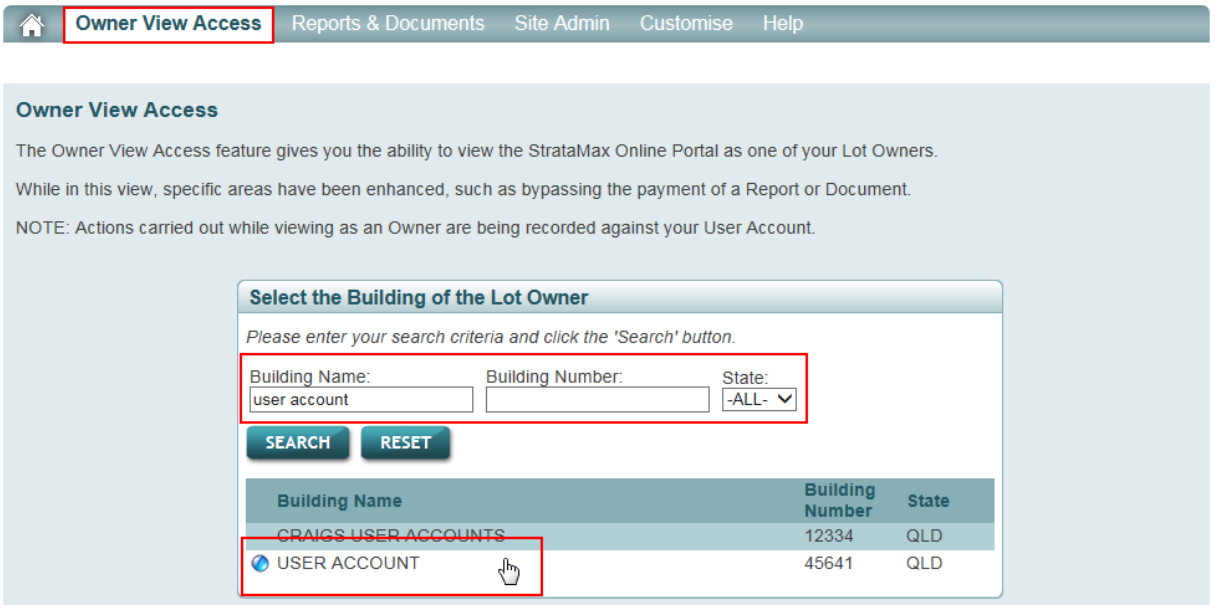
5. The list of owners for this building will appear.
    - This list is synchronised with the ***Roll*** menu in StrataMax.
    - If an owner has an active Portal account, a magnifying glass icon will appear under the *Active User Account* column. If there is no magnifying glass icon, there are two possible reasons for this:
        - The user has not created a Portal account. In which case send them the link to the Portal Help article, explaining how to create an account: *Creating a StrataMax Portal Account | Portal Help*
        - The user has created a Portal account with an email address that differs to the one that is saved in the ***Roll*** menu. If this is the case, ask them to create an account with the same email address you have in the ***Roll*** menu, or you will need to change the email address in their contact card, in the ***Roll***.
    - If the owner has an active Portal account and is a committee member and has logged into their Portal Account with the email address recorded in their contact card in the ***Roll*** and ***Office Bearers*** screen (it's critical that both of these screens are using the same contact card), a 'Yes' will be displayed under the *Office Bearer* column. If the 'Yes' is not present, this indicates the office bearer has not yet logged into their Portal account.
    - To identify the email address used by the lot owner for portal access; click on the magnifying glass icon.
6. Click the *View* link to view the lot as that owner.
    - User accounts email addresses are identified to assist users with owners who may have forgotten their login email address.



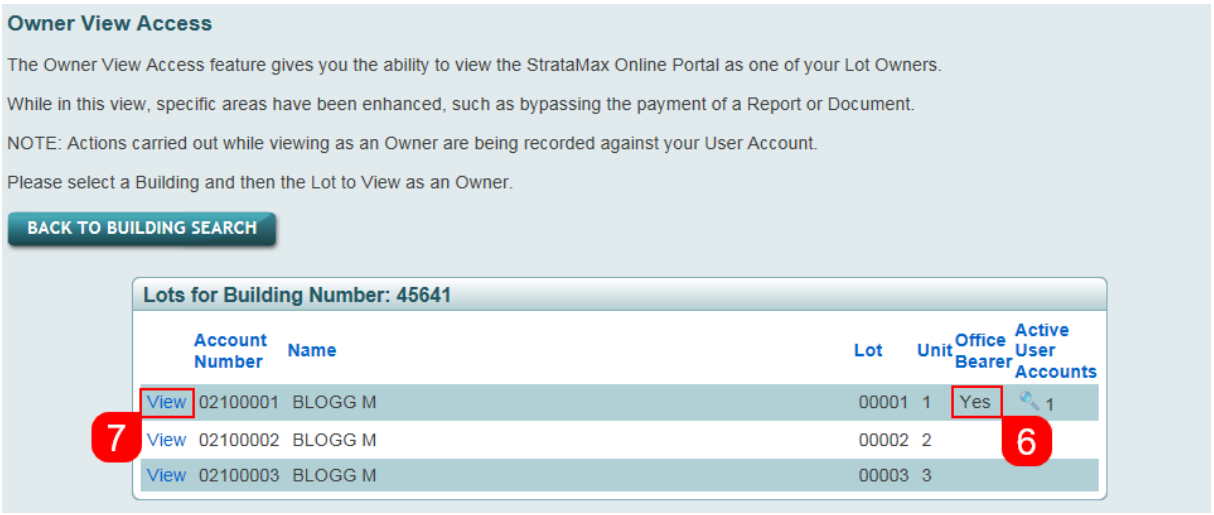
Office Bearer View

If an office bearer is selected as an owner to view, the following screen will appear to provide the option to either view the lot as an owner or an office bearer. If the office bearer approves invoices on the ***Invoice Hub***, the office bearer view will enable viewing of the invoices on the***Invoice Hub*** just as the office bearer would see it, however invoices cannot be approved or queried. Also, if the person / office bearer in question has never approved an invoice before, or there currently isn't an invoice to approve, the ***Invoice Hub*** tab won't be visible.

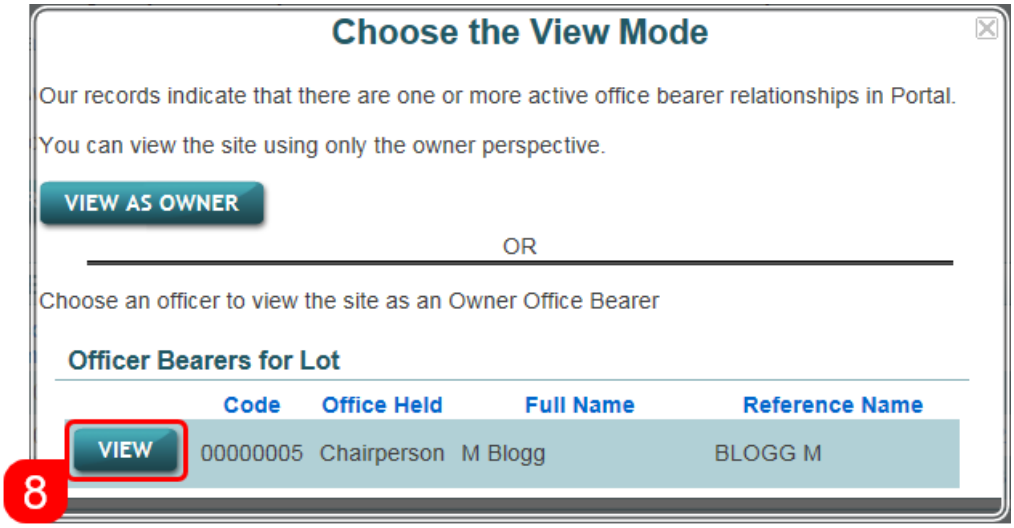
1. Ensure the committee member has been added as an***Office Bearer*** in the property in StrataMax and if the contact is an Owner of a lot in the ***Roll,*** select the *Owner of Lot* field and select the associated lot account.
2. Sign in to the StrataMax Portal with a manager account.
3. Once signed in, click the *Owners View Access* tab, located on the menu bar.
4. Enter the name or the number of the building to view and click*Search*. This will list the buildings that matches the search criteria.
5. Hover over the building and a blue icon will appear next to the building name to identify the building is highlighted.



6. The list of owners for this building will appear. If an owner is a committee member, a 'Yes' will be displayed under the *Office Bearer* column. If the 'Yes' is not present, this indicates the office bearer has not yet logged into their Portal account with the email address recorded in Office Bearers and their contact card to gain Committee level access.



7. Click the *View* button.
8. A pop-up appears *Choose the View Mode;* under the *Office Bearers for Lot* list click the *View* button next to the required committee members.



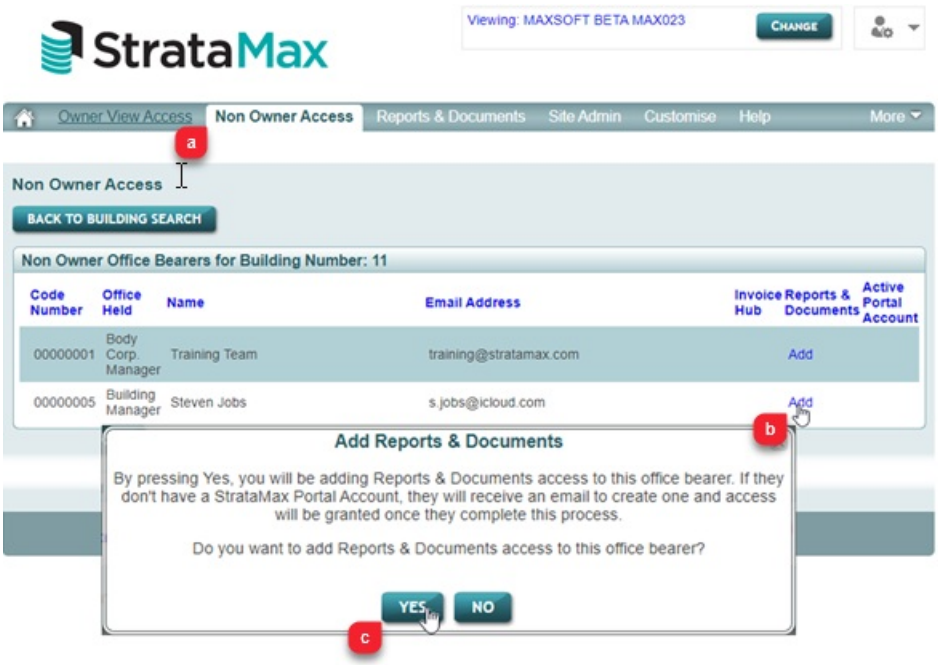
Non-Owner Office Bearers

Non-Owner Office Bearers can be granted access to Committee Reports and Documents on the StrataMax Portal.

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

If they need to be granted access manually, follow these steps:

1. Ensure the Committee Member has been added as an ***Office Bearer*** in the property in StrataMax and that they are not linked to a lot.
2. Sign in to the StrataMax Portal with a Manager account.
3. Once signed in, click on *Non Owner Access* tab, located on the menu bar (a).
4. Enter the Building Name or Building Number required to view and click *Search*.
5. Select the property required from the results displayed.
6. Click *Add* next to the Office Bearer to grant access (b).
7. A pop-up window will appear asking to confirm access, click *Yes* to proceed and complete the process (c).



StrataMax Portal Owner Access Troubleshooting

Use this section when a Portal user can log in but cannot see the expected property, sees an unexpected property, cannot access VoteMax or Invoice Hub, or is using an old email address.

What to check

- Portal account email: the email address used to log in to the Portal is not different from the email address recorded on the StrataMax ***Roll***.
- Roll contact email: Changing a contact email address in StrataMax does not always change the Portal login email. The Portal user may need to update their account email, or Support may need to investigate the account link.
- Office Bearer contact: Check that non-owner office bearers or ***Invoice Hub*** are using the same email address on the Portal that is recorded on their contact card in ***Office Bearers***.
- Shared or linked property: a StrataMax Portal user may see more than one property if their email is recorded against more than one property. Even across lots in different buildings, even if those buildings are managed by a different Body Corp Manager (using StrataMax).
- Log a case with the StrataMax Support Team: *Support will need to be contacted* if the account, property link or historical login data needs to be checked in the back end.

Steps

1. Confirm the email address the user is using to log in to the Portal.
2. Confirm the email address recorded in the user's contact card in the ***Roll*** or ***Office Bearers*** record

for the property.
    - Check that there aren't any hidden spaces.
    - Confirm the spelling.
    - Ensure any special characters like hyphens, underscores, or punctuations are correct.
3. Use Owner View Access to check what the user should be able to see (note that Invoice Hub and VoteMax cannot be accessed using Owner View Access).
4. If the user needs to change their Portal login email, direct them to the *Owner Portal change-email instructions*.
5. If the user sees an unexpected, linked property or the account history is unclear, *log a Support case* with the user email, property details and screenshots.