

StrataMax Portal | Manager's Portal

Last Modified on 14/10/2026 8:37 am AEST

The setup and access instructions for the **StrataMax Managers Portal** are provided below. The portal offers a modern, user-friendly platform for accessing and reviewing key StrataMax data, with clear information and intuitive navigation.

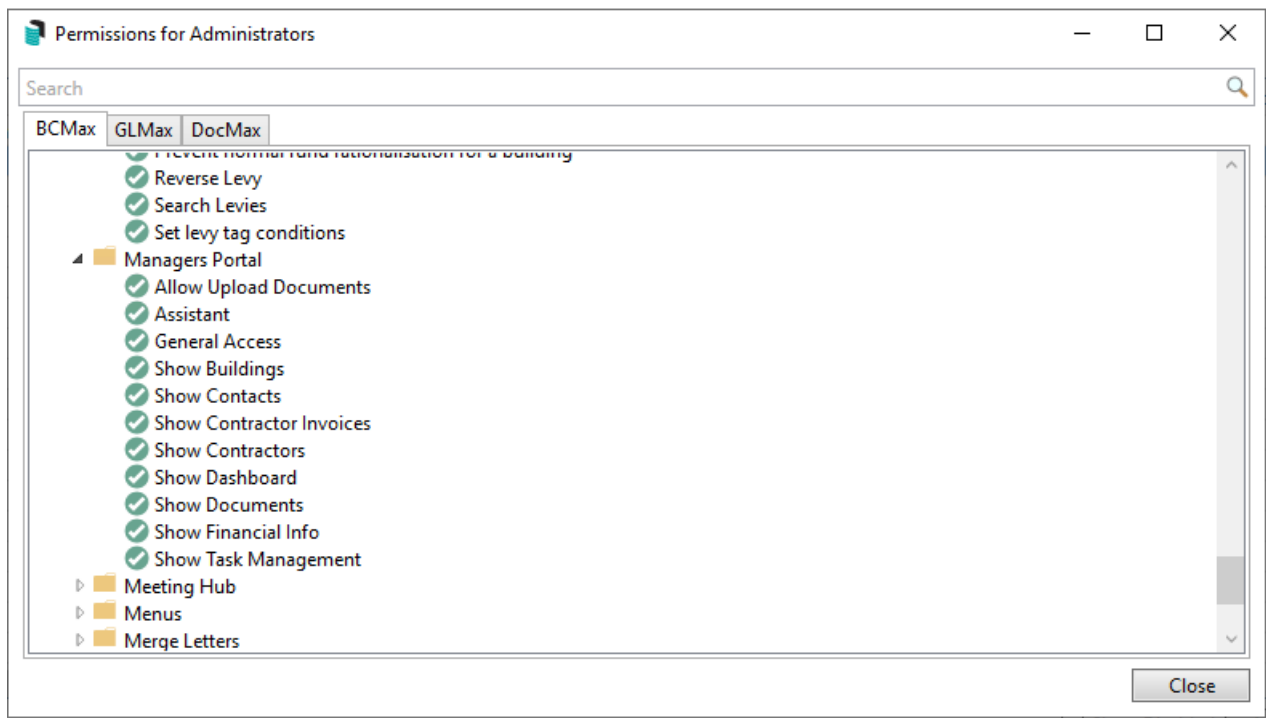
This first release provides a comprehensive strata management solution. Tasks, Reporting and Analytics and Building Inspections are coming soon.

Security Setup

StrataMax recommends enabling Multi-Factor Authentication (MFA) to enhance account security. When MFA is enabled, users will be required to verify their identity using an authenticator app each time they log in to StrataMax or the Managers Portal. To enable MFA for all users within your organisation, please contact StrataMax Support.

Security Setup lets you configure access to various areas on the **StrataMax Managers Portal** using the options below.

By default, Administrators will have the *Allow* permission set for all areas. For other staff, including groups, review and set the permissions as required.



Set up the Expense Summary (Expense Breakdown Graph)

The Manager's Portal includes a Financial Analysis area that reports on the account codes configured in the *Expense Summary* area in StrataMax. Account codes can be grouped into meaningful categories and displayed in various graphs for current and previous years. Transactions can also be exported to Excel.

If specific account code ranges are not required, use the expense start and finish ranges for a basic setup.

1. Search or select **Financial Statements**.
2. Options / Edit Account Summary List / select *Expense Summary* from the drop-down list.
3. Click  in the *Global Ranges* area to set a category, range start and finish on the account codes.

The same option exists for the *Building Override Ranges*.

4. Click *Save* to finalise the setup.

Account Range Setup

Expense Summary

+ Global Ranges

Category Name	Range Start	Range Finish	
Caretaker Fees	13010	1301002	X
Cleaning	13105	13110	X
Building Maintenance	136	1363002	X
Gardening and Grounds	139	1391002	X

+ Building Override Ranges

Category Name	Range Start	Range Finish	
Administration	12105	12720	X
General Maintenance	12900	13405	X
Insurance	14305	14315	X
Administration	15005	15015	X

Save Close

Set up the Cashflow Summary (Financial Analysis Graphs)

The Cashflow Summary reports cash flow for the previous 12 months. Custom categories and account code ranges can also be configured. These instructions relate to creating a manual setup, with instructions further below on importing a summary setup.

For a basic setup, enter the applicable income start and finish ranges.

1. Search or select **Financial Statements**.
2. Options / Edit Account Summary List / select *Cashflow Summary* from the drop-down list.
3. Click  in the *Global Ranges* area to set a category, range start and finish on the account codes.

The same option is available for *Building Override Ranges*.

4. Click *Save* to finalise the setup.

Account Range Setup

Cashflow Summary

+ Global Ranges

Category Name	Range Start	Range Finish
Administrative Income	101	101102
Insurance Income	103	103102
Sinking Fund Income	201	20302
Sinking Investment Incom	2070	2070

+ Building Override Ranges

Category Name	Range Start	Range Finish
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Save
Close

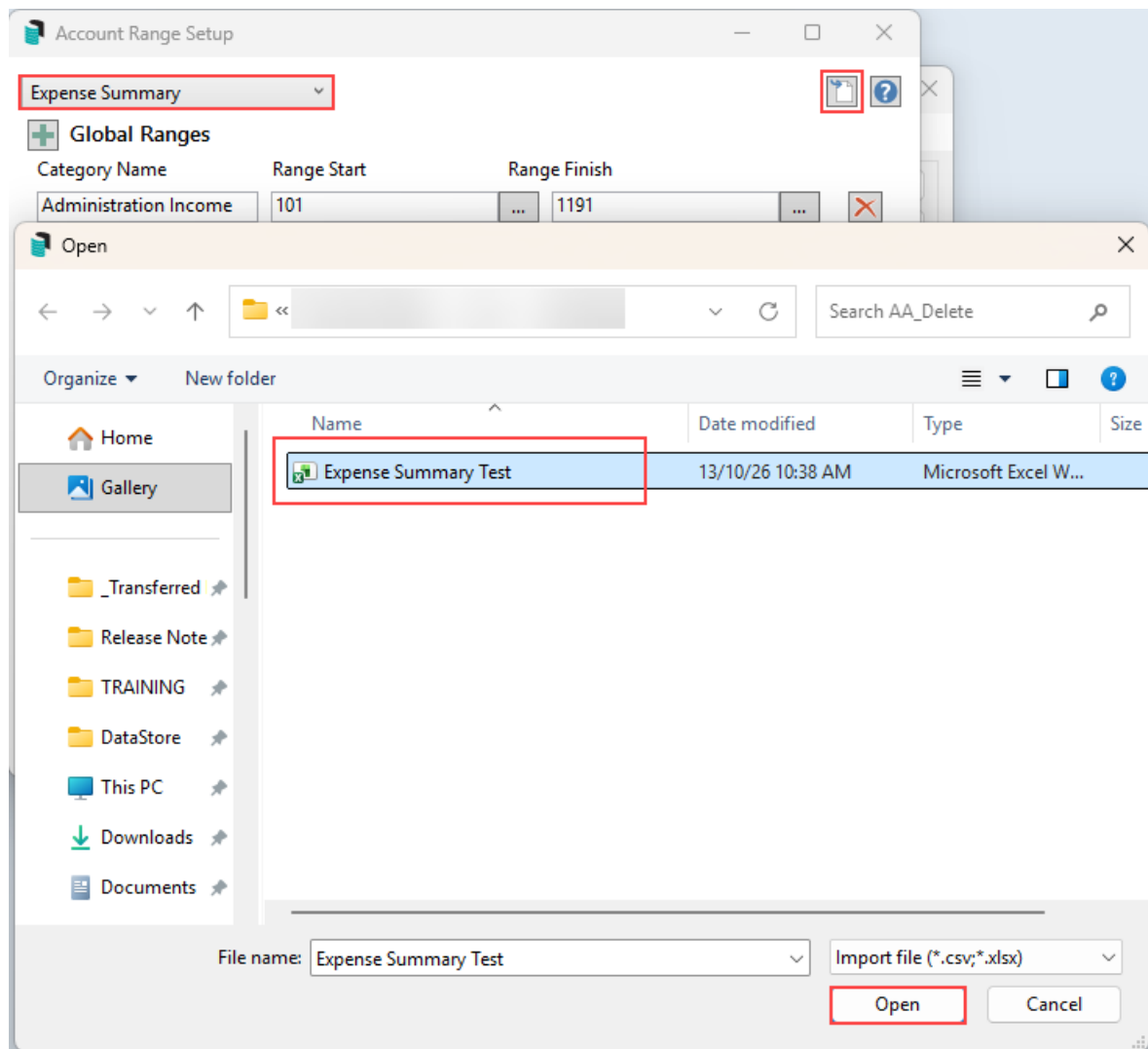
Summary Import

All summaries, which are Financial Account, Cashflow and Expense, are available to import with an Excel file. This file must contain the headers: Building Number, RangeCategory, CategoryName, RangeStart and RangeFinish. To import to the Global Ranges area, the Building Number is 0000.

This is an example of a Cashflow Summary Setup in the Excel worksheet.

	A	B	C	D	E
1	Building Number	RangeCategory	CategoryName	RangeStart	RangeFinish
2	0000	Cashflow Summary	Administration Income	101	1191
3	0000	Cashflow Summary	Administration Expense	120	130
4	0000	Cashflow Summary	Sinking Income	201	2191
5	0000	Cashflow Summary	Sinking Expense	220	26005

1. Search or select **Financial Statements**.
2. Options / Edit Account Summary List / select the *Summary* type from the drop-down list.
3. Select the Import Categories icon and navigate to where the Excel worksheet is saved, and click *Open*.
4. If there is an existing summary setup, there will be a warning to confirm that the import will replace the existing ranges for each building category combination. Select *Yes* to continue.



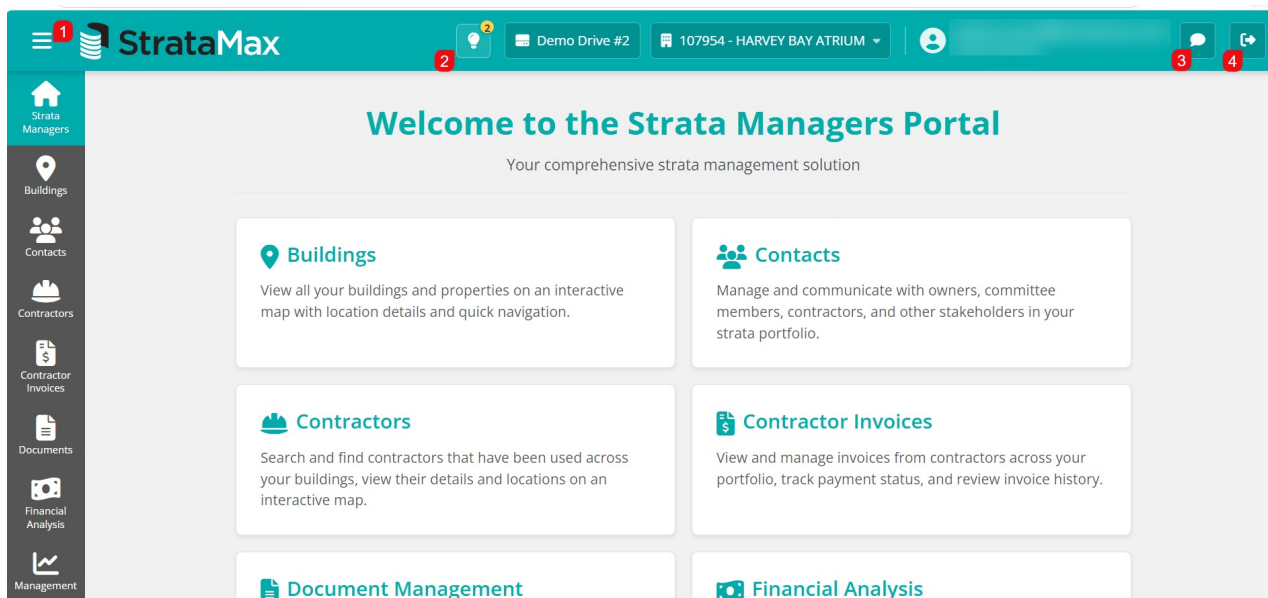
Accessing the Manager's Portal

You can access the Manager's Portal by logging in with your current StrataMax Username and Password. If 'Remember Me' is selected, your password will be remembered for 7 days or based on your browser configuration.

When first accessing the Portal, you will have the option to 'take a tour'. When selected, the tour displays helpful on-screen prompts that guide clients through a high-level overview of the Portal. This can also be skipped.

Navigation

1. Toggle Navigation
2. Tips & Updates
3. Give Feedback
4. Logout Button

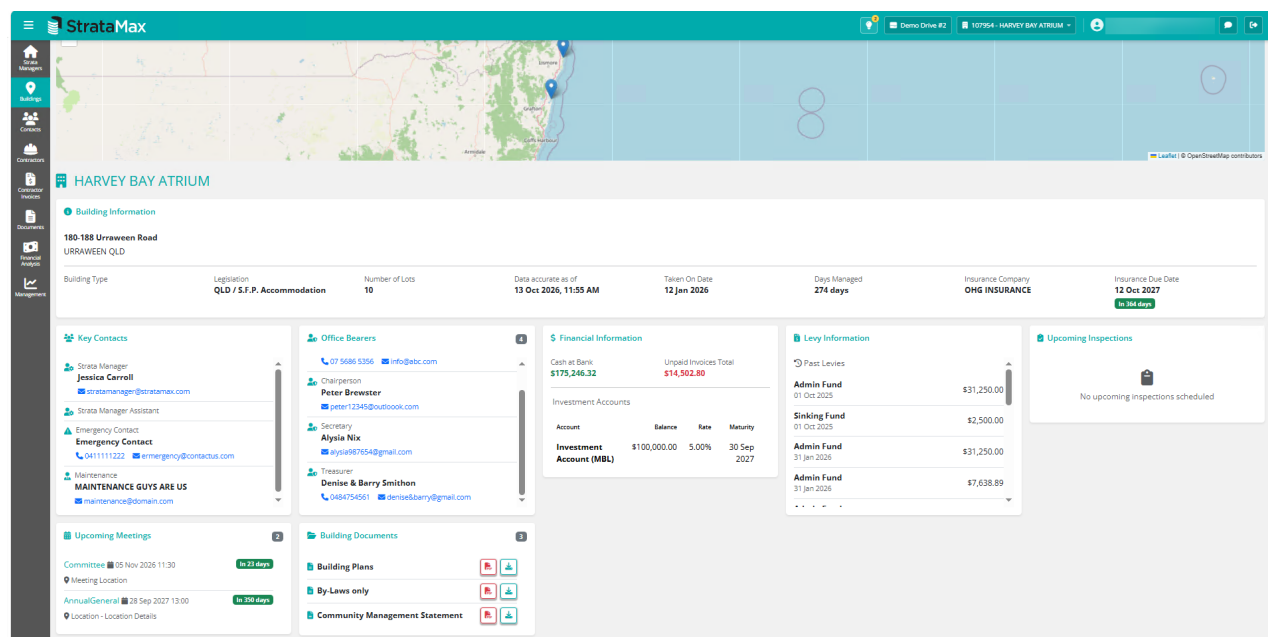


Buildings

The buildings page provides an overview of key building information, along with an interactive map allowing clients to select a building by clicking on a map marker. The map marker will display the address for the building selected based on the **Building Information** address when populated from the address look-up functionality.

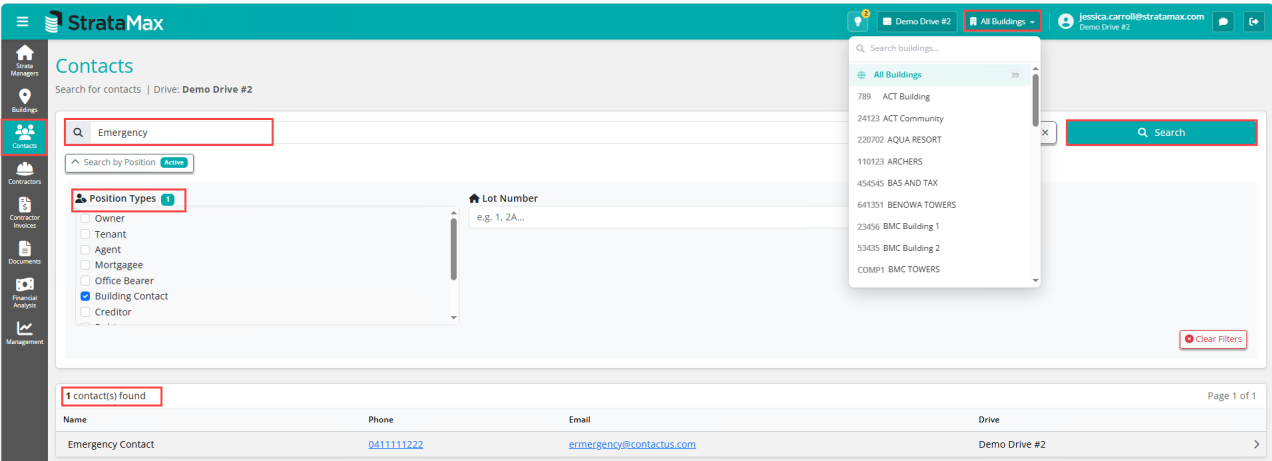
Key Features:

• Building Information	• Office Bearers	• Levy Information
• Key Contacts	• Financial Information	• Upcoming Inspections
• Upcoming Meetings	• Building Documents	



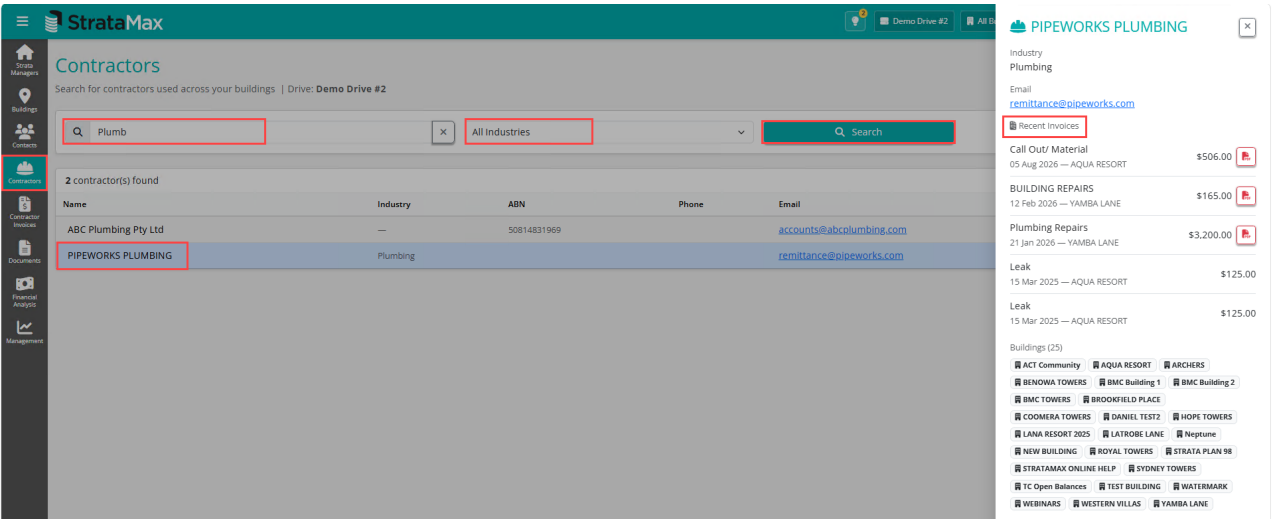
Contacts

You can search contacts by name, company, position, or lot number. This search is available per building or for all buildings.



Contractors

This area lets you look up contractors by Name, ABN, or Industry (set in **Creditor Maintenance** in StrataMax). You can view contact details, including a building reference showing which building the creditor has been used in, plus quick access to recent invoices you can download. Recent invoices will include invoices from all buildings.



Contractor Invoices

You can search for contractor invoices by Name, ABN, or Paid/Unpaid status here by building. Advanced filters let you refine your search further, if needed. You can download each invoice using the  icon.

StrataMax Contractor Invoices

Viewing: HARVEY BAY ATRIUM | Drive: Demo Drive #2

Search: Sunshine Electrical Services | ABN Search by ABN... | All Statuses

Advanced Filters

Date From: dd/mm/yyyy | Date To: dd/mm/yyyy | \$ Minimum Amount: No minimum | \$ Maximum Amount: No maximum

Has Document: All | Is On Hub: All

2 Invoice(s) found | Page total: \$968.50 | Search total: \$968.50 | Page 1 of 1

Contractor	ABN	Date	Invoice Number	Building	Amount	Status	Doc
> Sunshine Electrical Services	39283660305	12 Oct 2026	INV-LS-68590	HARVEY BAY ATRIUM	\$781.00	Paid	
> Sunshine Electrical Services	39283660305	12 Oct 2026	INV-EL-48041	HARVEY BAY ATRIUM	\$187.50	Unpaid	

Document Management

You can search for documents in this area; it shows documents saved to DocMax that you can download or view. You can also upload documents and supported image files. Filters help you locate documents as needed.

StrataMax Document Management

Upload Documents

Search Documents

Title: Minute | Category: All Categories | Lot: Search by lot...

File Type: All File Types | Added Date From: dd/mm/yyyy | Added Date To: dd/mm/yyyy

Search | Clear

Search Results 1 document(s)

Title	Category	File Type	Added Date	Building	Actions
2025 Minutes of AGM Meeting Minutes of AGM Meeting 2012.doc	Meeting Minutes	doc	27/04/2026	HARVEY BAY ATRIUM	

Upload Documents

You can select Profiles and Building when uploading a document or image file from the *Upload Documents* button, which is available on any device. Alternatively you can take a photo using your device and upload this to DocMax via the *Take Photo* button.

There is a management dashboard available for StrataMax Administrators, which is controlled via the Security Setup. This will provide a portfolio breakdown based on account manager and include Buildings

and Lots managed, with other key areas of managing data to report and Export to Excel. Information displayed is based on the below criteria:

Insured - Insurance Policy 901 due date is not in the past

Meetings - Meetings entered into [Meeting Summary](#)

AGM Compliance - Based on meetings date entered into Meeting Summary and the Financial Year end date; determination of whether the AGM was held on time is based on legislation for the specific building type.

Tasks (on time) - Tasks from [Task Management](#) assigned to any users for the Account Managers portfolio and the due & completed date.

Expiring Contracts - The expiry date from the [Contracts Register](#) for any contract with the category of Management Agreement.

StrataMax Management Dashboard
Account Manager Performance Metrics | Drive: Demo Drive #2

Account Manager: All Account Managers (7 account managers) [Export XLSX](#)

22 Buildings | 336 Lots | 71% Avg AGM Compliance | 33 Completed Tasks

Account Manager Performance
Select a manager to see their detailed breakdown.

Account Manager	Buildings	Lots	Insured	Meetings	AGM Compliance	Tasks (on time)	Expiring Contracts
> Bob Brown	5	75	0%	5	100%	10 12%	4
> [Redacted]	6	153	16%	2	100%	14 15%	2
> [Redacted]	4	45	20%	5	100%	3 0%	1
> [Redacted]	3	25	0%	3	100%	3 0%	0
> [Redacted]	1	18	0%	1	100%	1 0%	1
> [Redacted]	1	10	0%	0	0%	0 0%	0
> [Redacted]	2	10	0%	0	0%	2 0%	0
Totals / Averages	22	336	5%	16	71%	33	8

AI Chat Bot

An AI Chat Bot is available, and it is token-activated. Please have the StrataMax Administrator contact our [Support Team](#) if you'd like to enable this option.

Frequently Asked Questions

Q. What should I look at if the cashflow area is not reporting the same balance as StrataMax?

A. The cashflow reporting is driven from all bank accounts that are set up in [Bank Account Setup](#), including Term Deposits. If you review this area and ensure the accounts are available, it will upload to the Portal with the overnight synchronisation and report correctly.

Q. Why is the summary area blank when looking at the Financial Analysis area?

A. Review the Expense and Cashflow Summary setups in StrataMax.

Q. Why does the Google Map not show the property address?

A. Check that the Building Information address has been entered using the Australian Lookup Address Tool and update as needed.

Q. Why do my contracts not appear on the Portal?

Q. I am getting an error viewing documents, however if I try on my mobile phone or can see this on an external device it works, why is that?