StrataMax Portal | Manager's Portal

Last Modified on 24/11/2026 3:12 pm 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 users with tools so they can quickly view essential details, retrieve documents from DocMax, and even upload new documents on the go - making everyday tasks simpler, faster, and more flexible. Tasks, Reporting and Analytics and Building Inspections are coming soon.

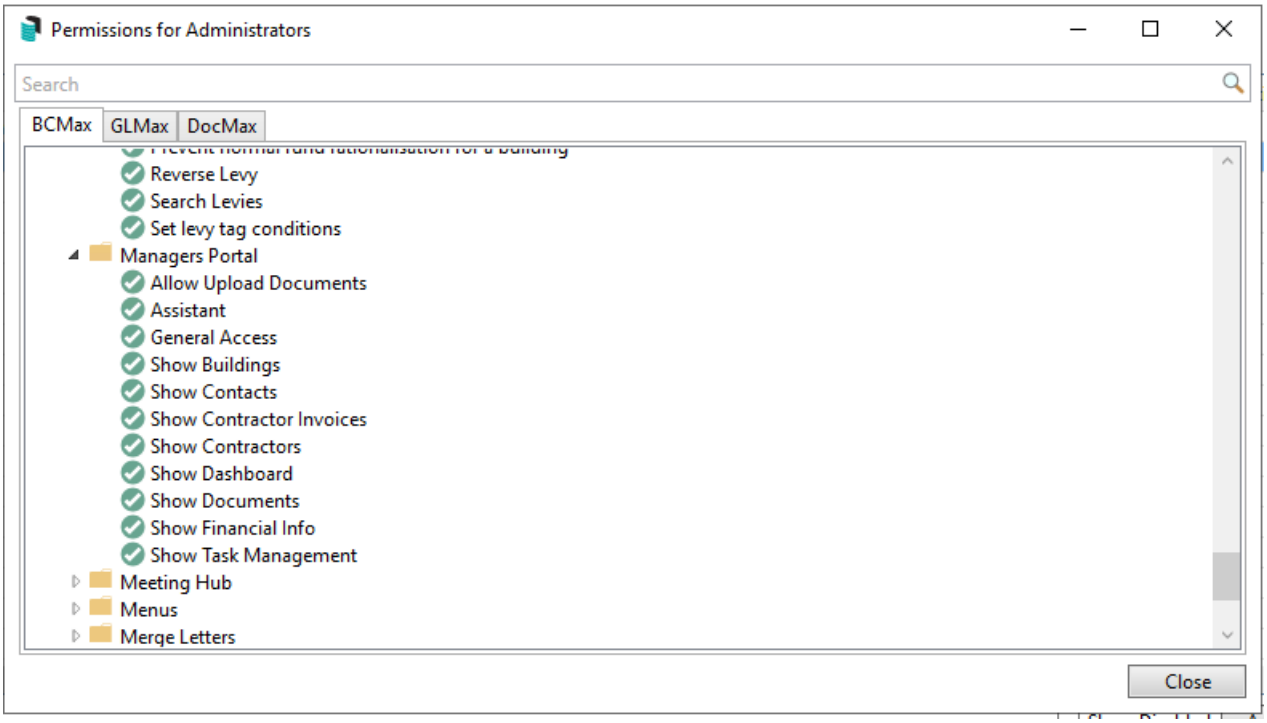
Access to the StrataMax Managers Portal is being progressively rolled out during quarter 4 of 2026.

Security Setup

Multi-Factor Authentication (MFA) is mandatory for the Managers Portal & Outlook Add-in 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.

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.



If required a user can have restrictions on what buildings they can access in StrataMax and the Managers Portal; click here for further information.

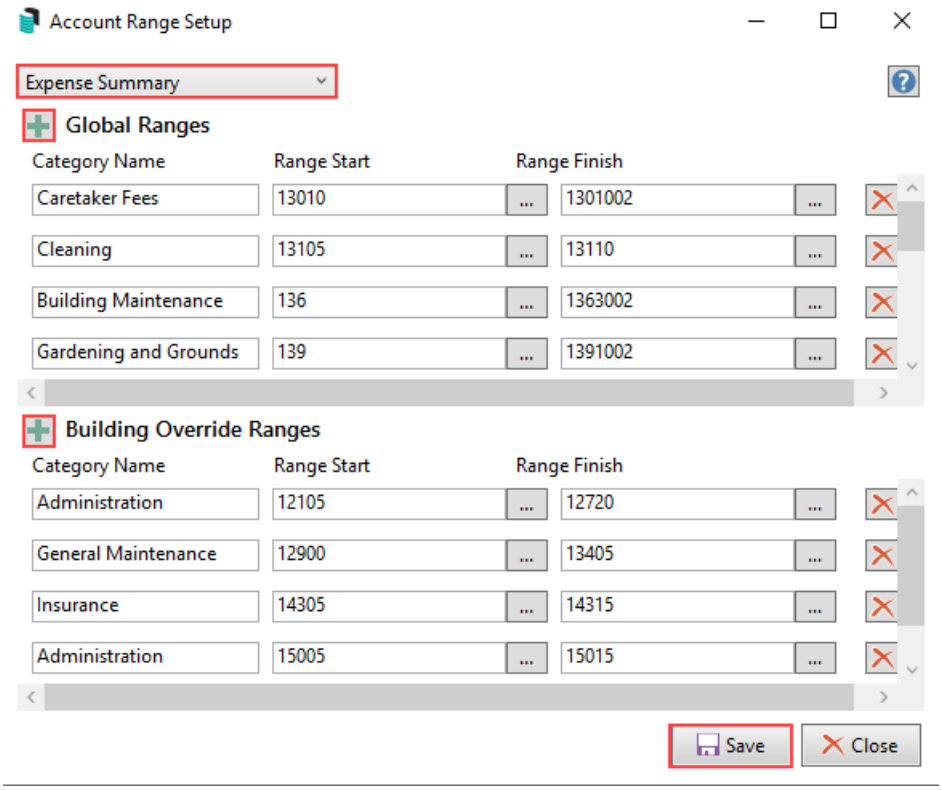
Set up the Expense Summary (Expense Breakdown Graph)

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.



Global and Building Override Ranges: Global Ranges apply to every building. If a building has Building Override Ranges, they replace the Global Ranges for that building completely, so they must cover all of its expense codes. New buildings use the Global Ranges, so keep them matched to your master chart.

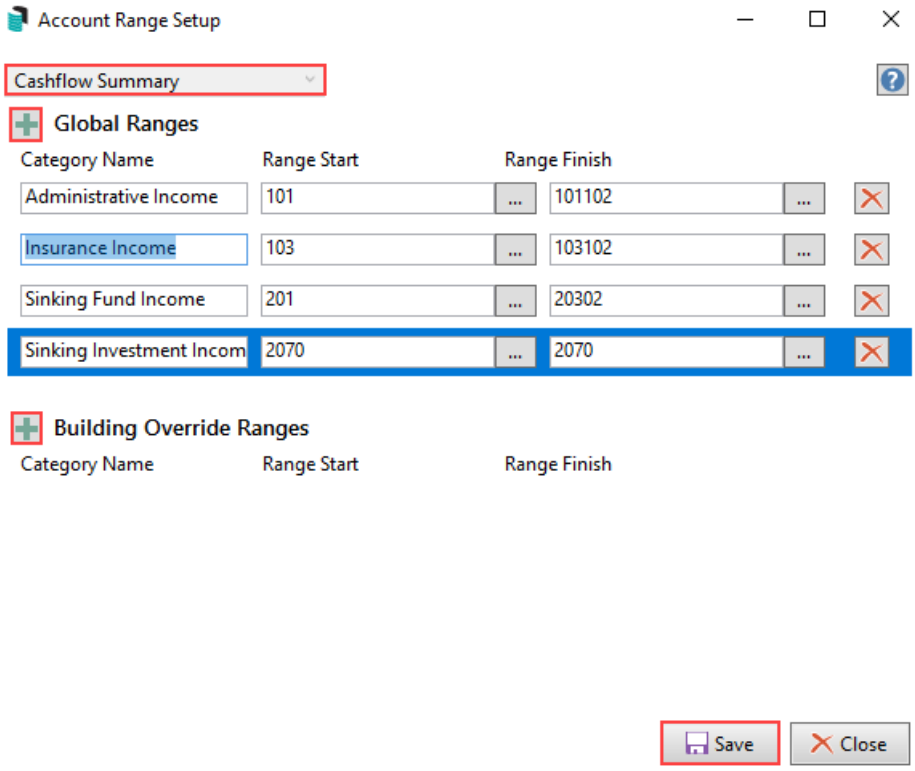
Adding expense codes later: a new code that falls inside an existing range takes that range's category. If it falls outside every range, edit the setup to extend a range or add one, otherwise it shows as *Other* on the dashboard.

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.



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

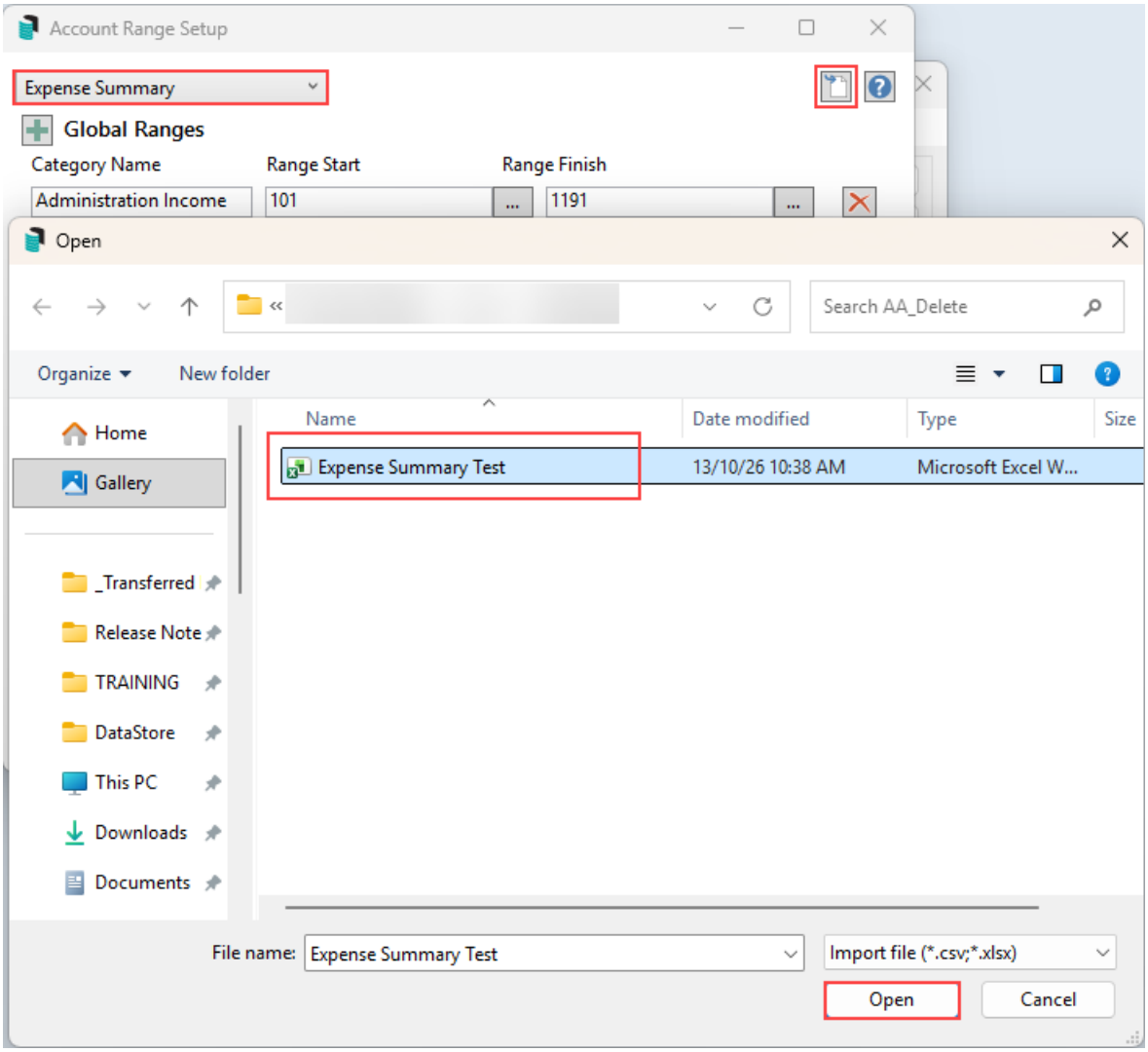
1. Search or select ***Financial Statements***.
2. Options / Edit Account Summary List / select the *Summary* type from the drop-down list.
3. Select the Import Categories icon and navigate to where the Excel worksheet is saved, and click *Open.*
4. If there is an existing summary setup, there will be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

Import rules:

- RangeCategory is the summary type exactly as it appears in the drop-down, for example Expense Summary or Cashflow Summary.
- Category names can be up to 30 characters. A longer name stops the import, and nothing is changed.

- For each building and summary type in your file, the file replaces all of that building's existing ranges. Include every range you want to keep. Buildings and summary types that aren't in the file aren't changed.
- The import is saved immediately and there is no undo. Record your current ranges before you import.
- Keep Building Number as text so leading zeros stay (for example 011025). Use 0000 for Global Ranges.
- Building Override Ranges replace the Global Ranges for that building completely. They are not combined, so a building's override ranges must cover all of its codes.
- If the file came from an AI tool or another program, open it in Excel and save it before importing.
- A .csv file must not have a header row.

AI tip: An AI assistant can suggest expense categories and build this import file for a whole portfolio. See *AI Tips & Tricks | Set Up Expense Categories with AI*



Accessing the Manager's Portal

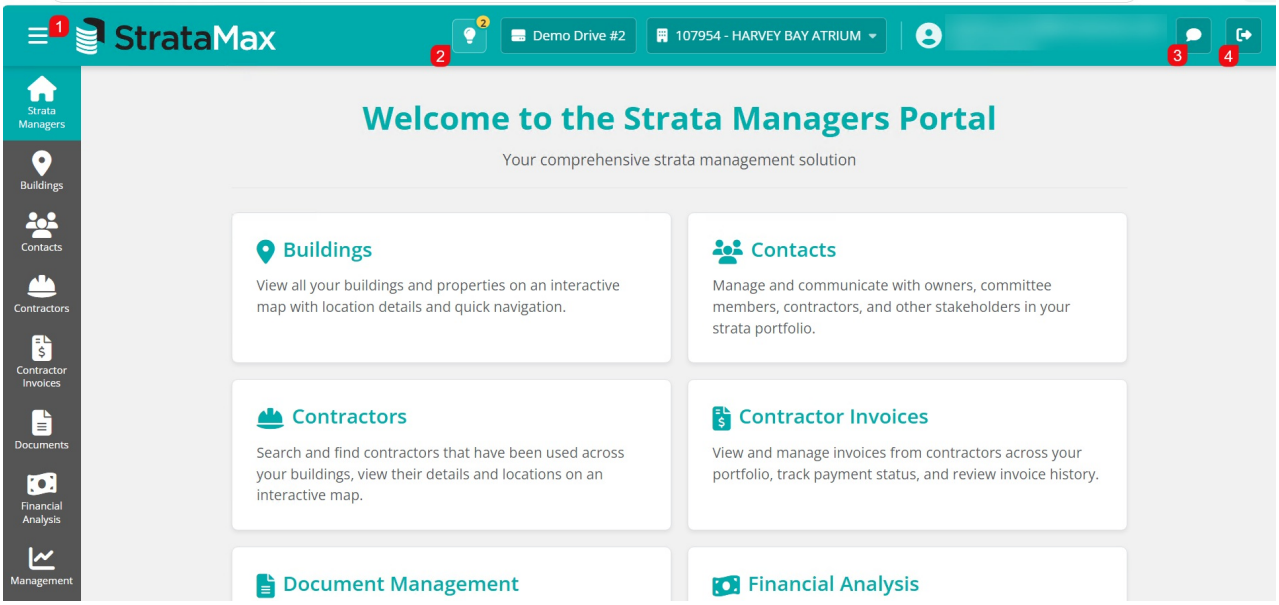
You can access the Manager's Portal by logging in with your current StrataMax Username and Password. If ' Remember Me' is selected, your password will be remembered for 7 days or based on your browser configuration.

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

Users can navigate to different pages using Press Ctrl+K to search portal pages and actions without leaving your keyboard.



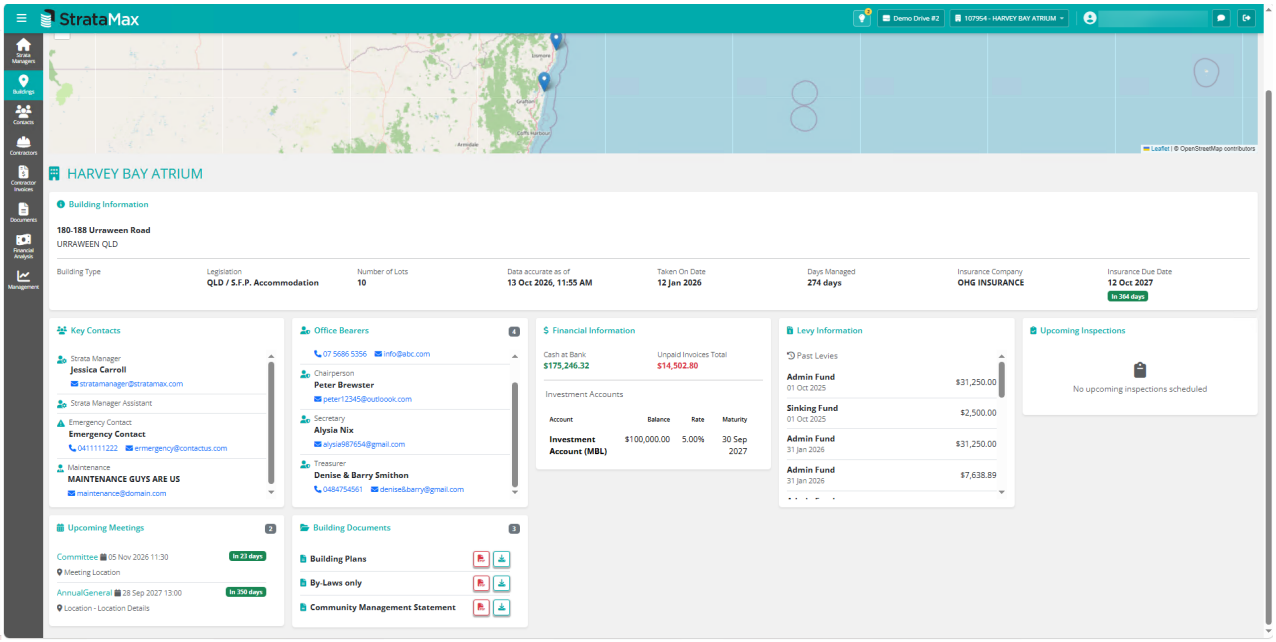
Buildings

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:

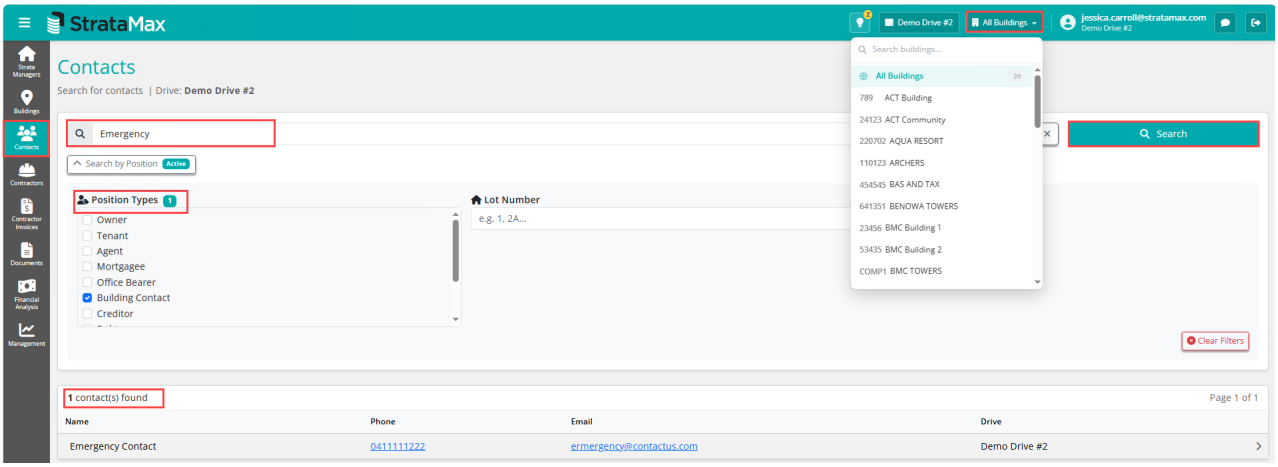
• Building Information	• Office Bearers	• Levy Information

• Key Contacts	• Financial Information	• Upcoming Inspections
• Upcoming Meetings	• Building Documents (DocMax Building Plans category)	



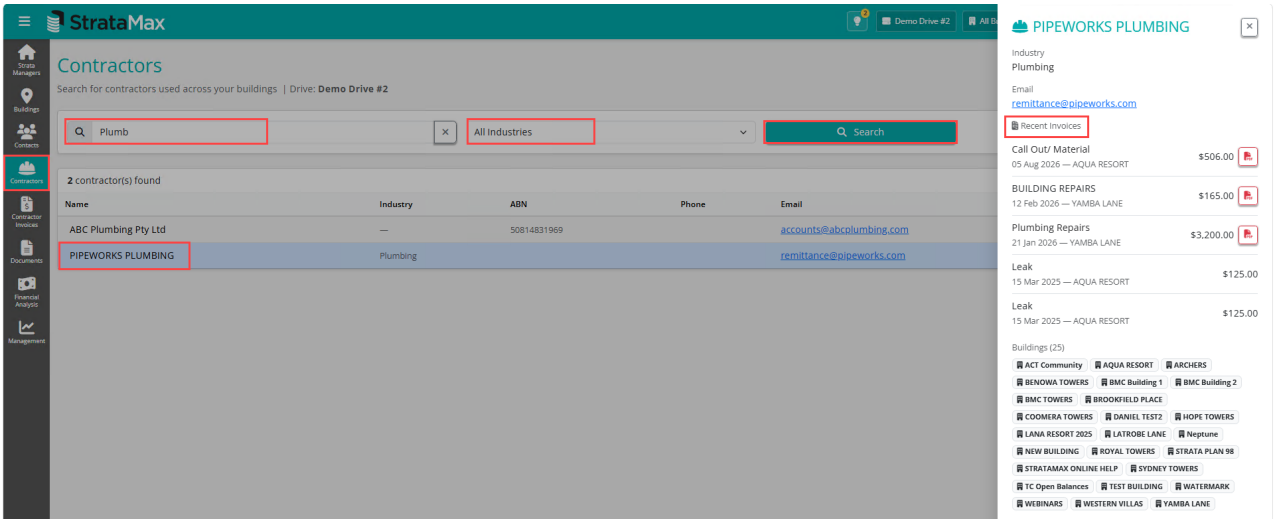
Contacts

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



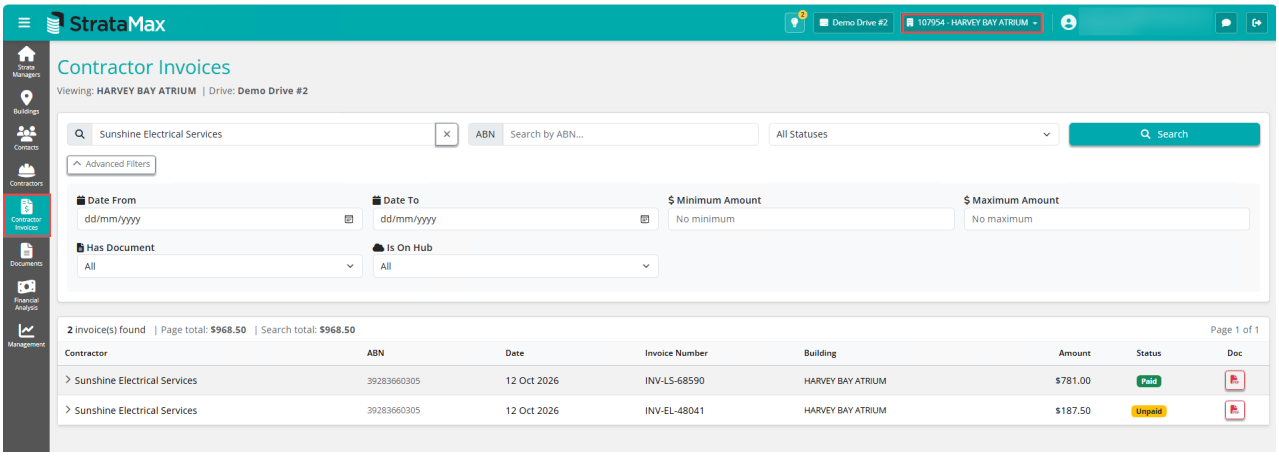
Contractors

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

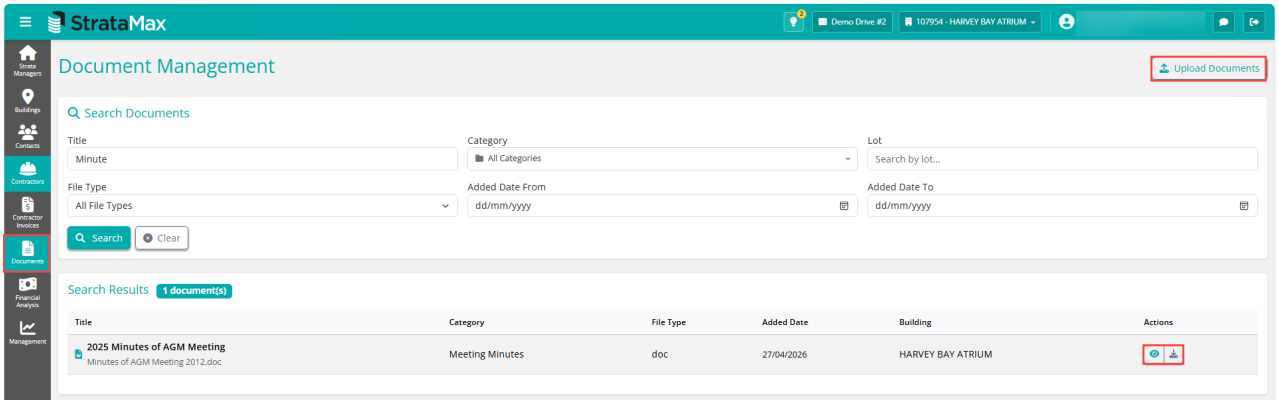
You can search for contractor invoices by Name, ABN, or Paid/Unpaid status here by building. Advanced filters let you refine your search further, if needed. You can download each invoice using the  icon.



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.

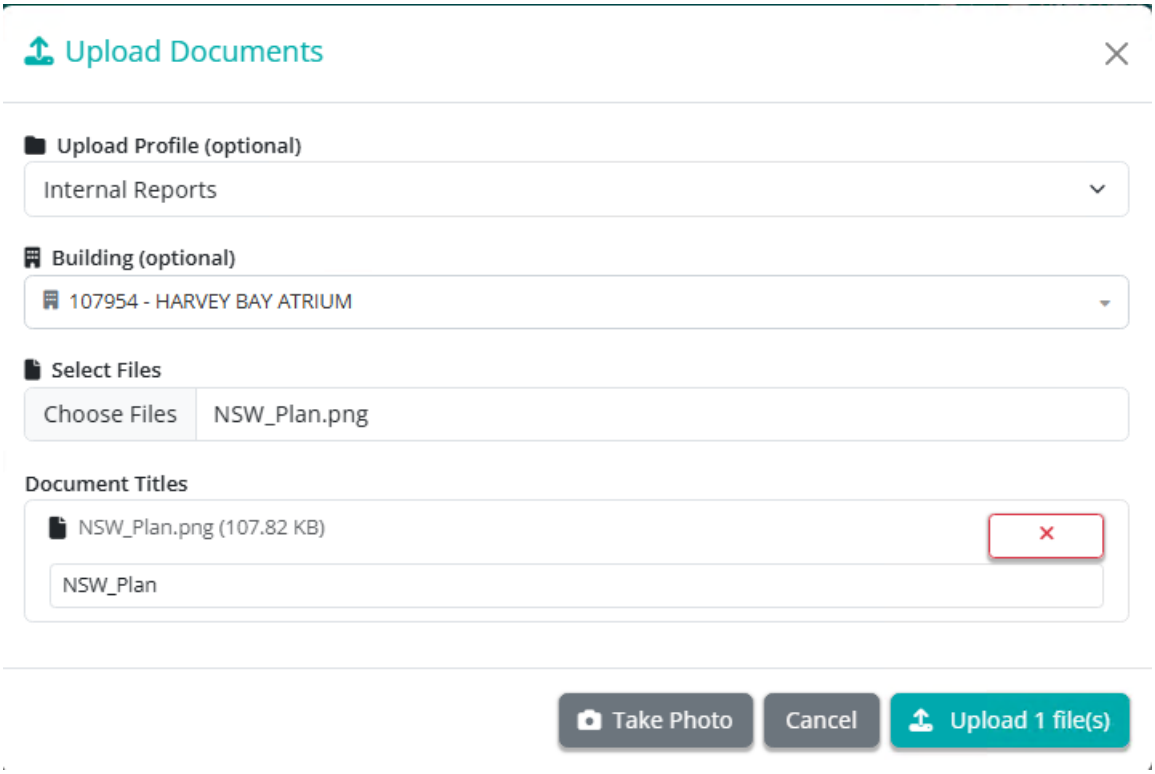
Changes to the display when using a mobile phone device are coming soon.



Upload Documents

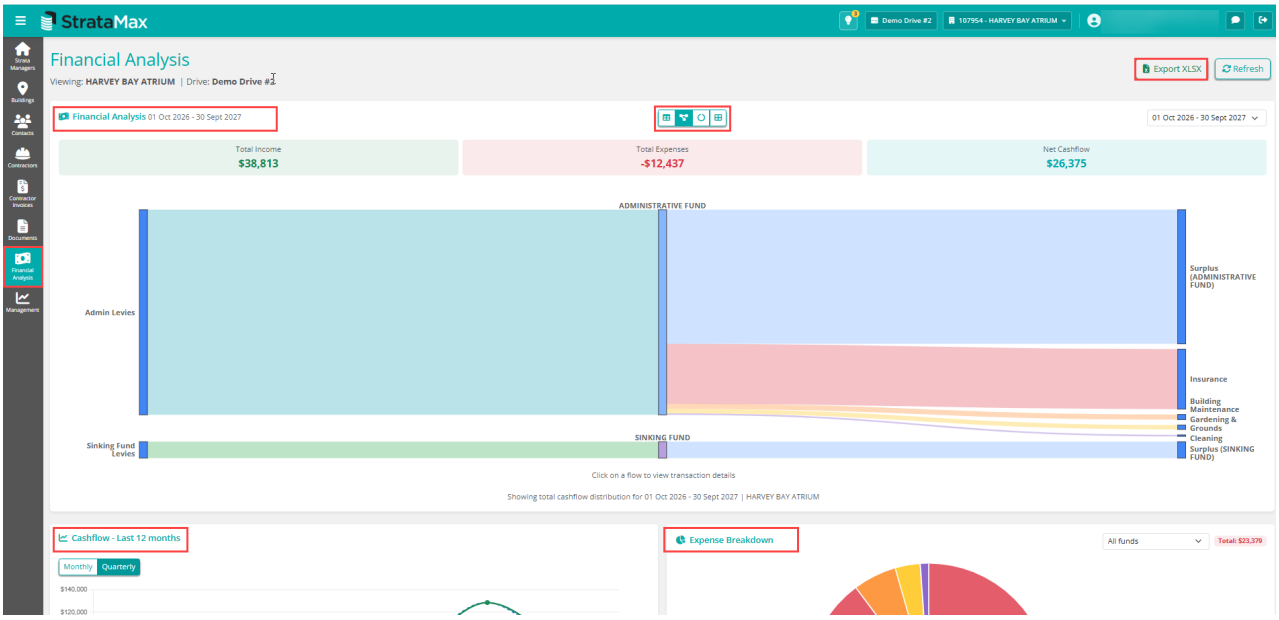
This allows uploading document/s to DocMax which will appear in your Add Document queue next time you access the StrataMax application or alternatively if a Profile is selected the document/s will automatically be filed to DocMax.

Alternatively you can take a photo using your device and upload this to DocMax via the*Take Photo* button.

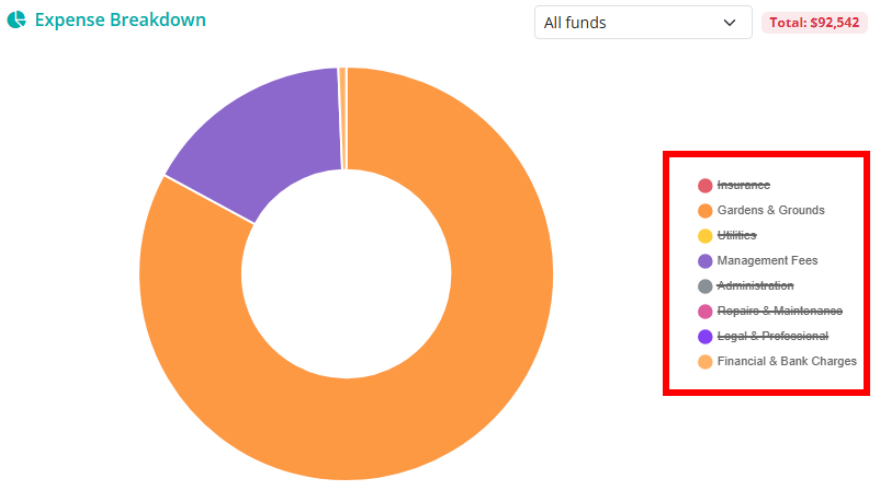


Financial Analysis

Once the Expense and Cashflow summary setups are finalised, the financial analysis area will offer a variety of reporting styles focused on income and expense, with cashflow and expense breakdowns. You can export this information to Excel.



Use the Fund filter to specifically look at the expense breakdown based on trading fund and / or click on the category names to exclude / include them. Similarly in the cashflow chart, click on Income, Expenses & Net Cashflow to exclude / include the line from the chart.



Management Dashboard

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:

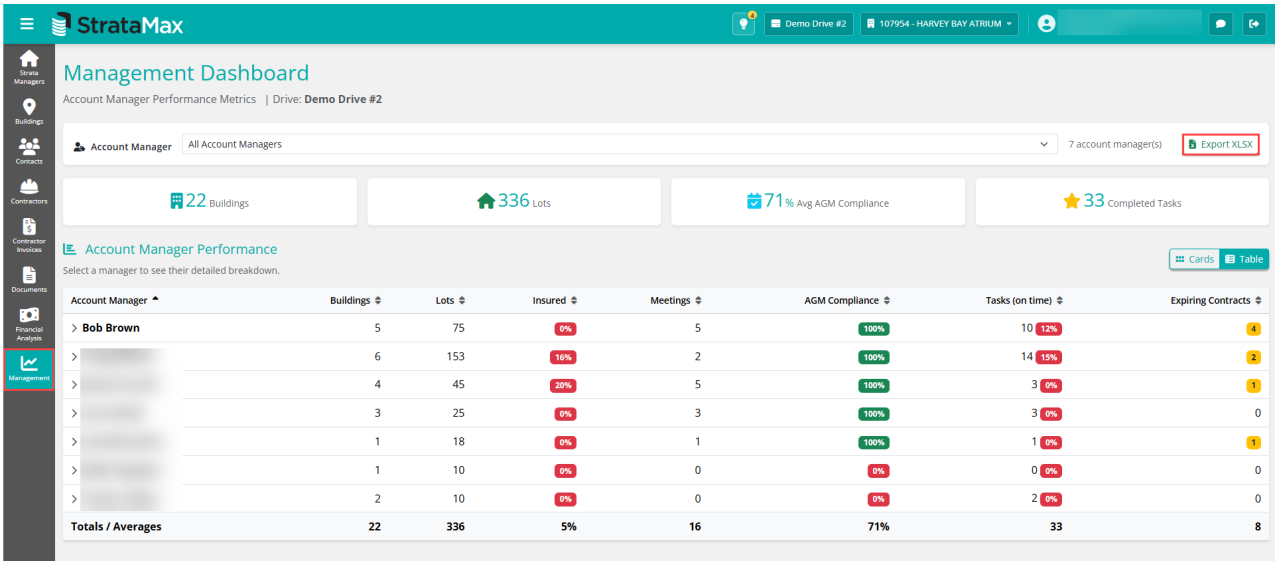
Insured - Insurance Policy 901 due date is not in the past

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.

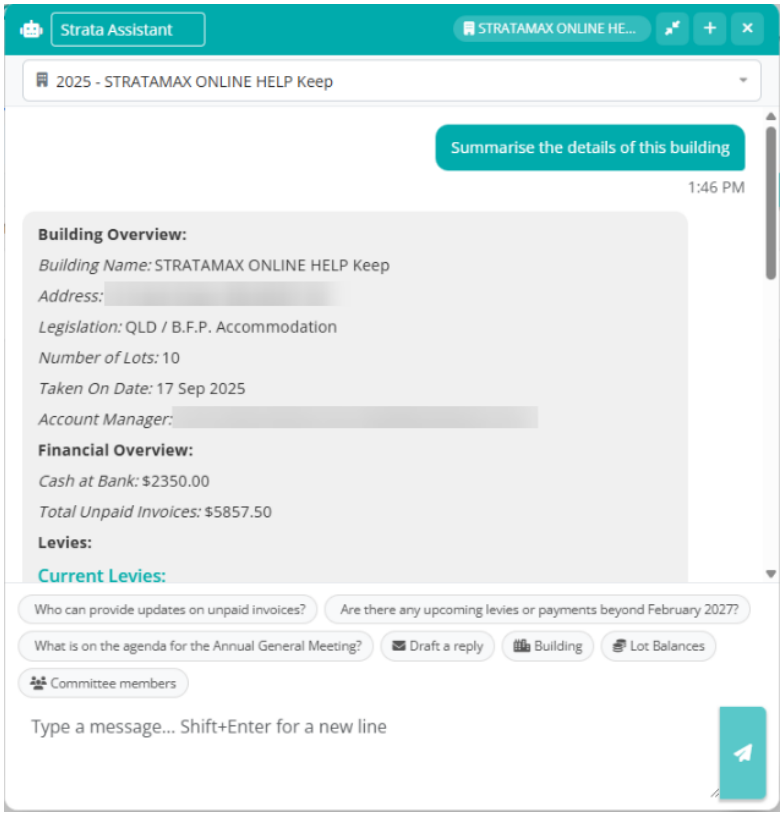
Expiring Contracts - The expiry date from theContracts Register for any contract with the category of Management Agreement.

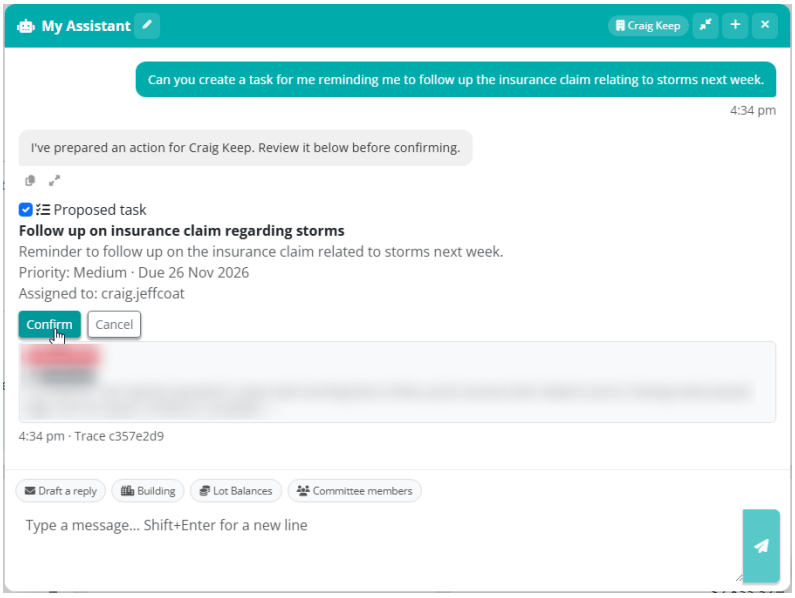


AI Chat Bot

An AI-powered natural language assistant that allows users to query and retrieve information from StrataMax using everyday language instead of navigating menus, reports, or databases. The Assistant can summarise data from various areas of StrataMax, assist with creating tasks in Task Management etc.

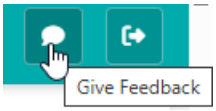
If the AI Assistant does not display for all users please have the StrataMax Administrator contact our Support Team if you'd like to enable this option.





Frequently Asked Questions

Q. We would like to provide some feedback, thoughts on what else we would like to see on the portal, where can we provide this feedback?
A. When logged into the managers portal, at the top right of the page click on the Feedback button.



Q. Why is the summary area blank and a message 'Please select an active building...' appearing when looking at the Financial Analysis area?
A. Review the Expense and Cashflow Summary setups in StrataMax. Information on setup is available at the top of this page.

Q. Why does the Map not show all of our properties &/or creditors?
A. Check that the Building Information address has been entered using the Australian Lookup Address tool and update as needed. Once updated; the daily building upload will be required before the portal is updated.

For creditors check the creditors contact card has had the address selected using the Australian Lookup Address tool.

Q. I am getting an error viewing documents, however if I try on my mobile phone or a different external device it works, why is that?
A. This is more than likely due to internal IT security measures blocking the preview from loading. It is recommended to contact your IT provider for assistance.

Q. Is the AI Assistant able to search and retrieve documents from DocMax?
A. It will be able to retrieve meeting documentation that is attached in the Meeting Summary menu however the initial release is not able to search all documents within DocMax.

Q. Will creditor compliance data be incorporated into the Contractors page?
A. Further enhancements for creditors and TaskMax integration is planned for later stages.