



Instructional Manual

## Online Owners Portal



StrataMax Pty Ltd ABN 62 096 505 949

t: 07 5575 7422 • f: 07 5501 7098 • [info@stratamax.com](mailto:info@stratamax.com) • [www.stratamax.com](http://www.stratamax.com)

Bldg 1, 175 Varsity Parade, Varsity Lakes QLD 4227 • PO Box 7110, GCMC Bundall QLD 9726

<b>StrataMax Online Portal</b> .....	<b>2</b>
Introduction.....	2
Login to the Owners Portal.....	2
Manage Account.....	3
Creating a User Account .....	3
Adding Your Properties to a User Account.....	4
Committee Access .....	5
Changing Property .....	5
Shared Access (Co-Owners).....	5
Property Details .....	6
Change Profile .....	6
Change Email Address or Password .....	6
Changing Password.....	6
My Info.....	7
Payments .....	8
Reports & Documents.....	9
Help.....	10
The Useful Links menu has links to the different State Act websites. ....	11
Request Password Reset.....	11
FAQ.....	12

## StrataMax Online Portal

### Introduction

The StrataMax Online Portal is a valuable tool for Owners and Committee Members. The portal is designed to give you access to a number of useful documents, reports and other details relating to your building and lot, these may vary based on what is made available. The portal is customised by your Strata Manager so you may find some of the pages and colours slightly different to the examples below.

For lot owners that own multiple properties, User Accounts allows access to multiple properties via one log in (User Account)

### Login to the Owners Portal

The login address: <https://www.stratamax.com.au/Portal/login.aspx>

Access to the Owners Portal is based on an account you setup which is called a 'User Account'. The account sign in name must be a unique email address and the password is setup during the creation of the User Account.



The screenshot shows the StrataMax Online Portal login page. At the top left is the StrataMax logo. To its right is a 'Font Size' control with 'A-' and 'A+' buttons and a 'Reset' link. Further right is a 'LOGIN' button. Below the logo is a navigation bar with 'Online Certificates' and 'Help' links. The main content area has a light blue background. It features a 'QuickPay' section with instructions to enter a 9-digit StrataPay Reference Number and a 'QUICK PAY' button. Below this are two columns: 'Sign In' with fields for 'Email' and 'Password', a 'LOGIN' button, and a link for 'Having problems logging in?'; and 'Create an Account' with a 'CREATE' button and text for users with a StrataMax ID. At the bottom is a 'Did you know?' section stating that the portal allows users to see and pay their exact outstanding balance.

## Manage Account

### Creating a User Account

As an owner of a lot your Strata Manager will issue a Welcome Letter that will contain a StrataMax User ID and Password for your property; the ID can only be added to one User Account. This is required to add a property to your User Account; follow the below steps to create a User Account.

1. Go to <https://www.stratamax.com.au/Portal/login.aspx>
2. Click on 'Create'
3. Enter 'StrataMax ID' and 'Password' that was provided by your Strata Manager or;
4. Enter 'Passport ID' and 'Password' with the existing credentials
5. Click on 'Upgrade'

The screenshot shows the StrataMax Online Portal interface. At the top, there is a StrataMax logo and a 'LOGIN' button. Below the logo, there is a 'Font Size' selector with options 'A-', 'A+', and 'Reset'. To the right, there is a link to 'Online Portal'. Below this, there is a navigation bar with 'Online Certificates' and 'Help'. The main content area is titled 'User Account Upgrade'. It contains a message: 'StrataMax Online Portal user authentication has been upgraded to use an email address and nominated password providing more memorable login credentials and easier management for multi-lot owners.' Below this message is a form titled 'StrataMax ID / Passport Details'. The form has two columns. The left column has fields for 'StrataMax ID:' (with the value '96073959') and 'Password:' (with masked characters). The right column has fields for 'Passport ID:' and 'Password:'. Both columns have an 'UPGRADE' button below the password field. At the bottom left of the form, there is a link: 'Having problems upgrading your StrataMax ID?'.

6. Enter your email into the 'Email Address' field and create a password of your choice, then confirm the same password
7. Select a 'Name Title' and enter 'First Name' and 'Surname' details
8. Tick 'I accept the Terms & Conditions' (click on link to view Terms & Conditions)
9. Click on 'Create'



LOGIN

Font Size: [A-](#) [A+](#) [Reset](#)

Online Portal

[Home](#) [Online Certificates](#) [Help](#)

## User Account Upgrade

BACK

StrataMax Online Portal user authentication has been upgraded to use an email address and nominated password providing more memorable login credentials and easier management for multi-lot owners.

**Enter details for your new StrataMax Portal User Account**  
**Linking StrataMax ID ('96074522') to new account**

Email:

Password:

Password Strength:   
 Password must be a minimum of 6-characters with combination of uppercase and lowercase characters, numbers and symbols.

Confirm Password:

Name Title:

First Name:

Surname:

☒ I accept the [Terms & Conditions](#)

CREATE

When a new User Account is created, an activation email will be sent to your email address; this email must be used to activate your User Account within 7 days before the User Account is suspended.

10. Your User Account will be created and your property will be linked to your User Account

**Your User Account has been created.**


An account activation email has been sent to your email address.  
 You will be granted 7 days access before Activation is required.

Your new Login is:

OK

If you cannot locate the activation email, check that you have entered your Email Address correctly and re-send the activation by clicking the message 'Send Activation Email'.



Viewing: Lot 00002  
 Strata Plan No. 45645



LOGOUT

Font Size: [A-](#) [A+](#) [Reset](#)

Online Portal

[Home](#) [My Info](#) [Payments](#) [Reports & Documents](#) [Help](#) [Contact Us](#)

Your account is pending and has been provided with limited time access.

SEND ACTIVATION EMAIL

**Adding Your Properties to a User Account**

If you own multiple lots, the properties can be added to your User Account thus enabling access to all of your properties details via one User Account. Follow the below steps to add additional properties to your User Account:

1. Go to <https://www.stratamax.com.au/Portal/login.aspx>
2. Log in using your User Account log in credentials
3. Click on your Profile icon and select My Properties
4. Enter the StrataMax ID and click on Link
5. Enter Password that was provided by your Strata Manager if prompted

Click here to return to Lot 00005 FIFTH AVENUE CTS 12568 **RETURN**

Font Size: A- A+ Reset **Online Portal**

**Manage Account**

Change Property | **My Properties** | Change Profile | Change Password | Change Email Address

**My Properties**

**Link Property**

StrataMax ID:

**LINK**

[Forgot StrataMax ID](#)

**My Properties**

	Building Name	Building Number	Lot Number	StrataMax ID	Type	
<a href="#">Details</a>	FIFTH AVENUE	12568	00005	96073673	Owner	<a href="#">Add Co-Owner</a>
<a href="#">Details</a>	4 HIRST STREET	45645	00001	96073674	Owner	<a href="#">Add Co-Owner</a>

## Committee Access

Committee access to reports and documents will automatically be granted if the email address of your User Account matches the email address recorded in the Committee Records of the Roll.

If the email address does not match a committee member can request Committee Access to allow additional Reports & Documents. If there is no email address recorded in the Committee records however a mobile phone number is a SMS verification may be used

Note: Committee Access can only be granted to one User Account for a lot. Once Committee Access has been requested no additional user accounts will be prompted to request access.

## Changing Property

If you have multiple properties/lots linked to your user account you can access the Home Page for the property by following either of the below steps:

1. Click on your 'Profile' icon and select 'Change Property'
2. Select the 'Change' button at the top of screen

**StrataMax** **Online Portal**

Font Size: A- A+ Reset

**Manage Account**

Change Property | **My Properties** | Change Profile | Change Password | Change Email Address

**Change Property**

Please select the property that you wish to access.

**Properties**

	Building Name	Building Number	Lot Number	StrataMax ID	Type
<a href="#">Select</a>	4 HIRST STREET	45645	00001	96073674	Owner
<a href="#">Select</a>	FIFTH AVENUE	12568	00005	96073673	Owner

## Shared Access (Co-Owners)

Your User Account ID and Password should remain confidential; for lots that have a dual ownership you are able to share access to a property.

To share access follow the below steps:

1. Log into your User Account
2. Click on your 'Profile icon' and select 'Manage Account'
3. From your Link Properties select 'Add Co-Owner' on the appropriate property
4. Enter Co-Owners Email Address
5. Enter your User Account Password
6. Click on 'Grant' to accept conditions of use

If the email address for the shared account is in use for another account, it will be automatically added. If the email address provided does not belong to any other account, the email will be sent a link with instructions for the Co-Owner to 'Create an Account' and accept the Terms and Conditions.

When access to a property is shared an automatic email is sent to all User Accounts linked to the lot as well as any unique email addresses recorded on the Roll (regardless of whether the email address has a User Account or not) informing them that access has been shared.

Shared access will grant owner access only; access to Committee Member Reports & Invoice Hub Approvals cannot be shared.

If for any reason a shared access requires removal, email your Strata Manager for the specific building and provide instructions.

### **Property Details**

To view property details follow the below steps:

1. Log into your User Account
2. Click on your Profile icon and select My Properties
3. Click on Details for the specific Property

### **Change Profile**

To change your User Accounts Profile follow the below steps; please note no changes will be sent to your Strata Manager.

1. Log into your User Account
2. Click on your Profile icon and select Change Profile
3. Edit fields as required
4. Click Update

### **Change Email Address or Password**

You can change your Username Email & or Password following the below steps.

Changing Email Address (Updating your email address will **not** notify your Manager of any changes)

1. Log into your User Account
2. Click on your 'Profile icon' and select 'Change Email Address'
3. Enter your new Email Address and your User Account Password
4. Select 'Update'

An activation email will be sent to your new email address; this email must be used to activate your User Account within 7 days before the User Account is suspended.

### **Changing Password**

1. Log into your User Account
2. Click on your 'Profile icon' and select 'Change Password'
3. Enter details
4. Select 'Update'

## My Info

Click on 'My Info' tab, 'My Details' to check your current details. To submit any changes complete the fields of information and click on 'Submit'. Changes will either be submitted electronically or you will be prompted to print and post the changes form.



Viewing: Lot 00004  
 Strata Plan No. 45645




Font Size: [A-](#) [A+](#) [Reset](#)
Online Portal

[Home](#)
[My Info](#)
[Payments](#)
[Reports & Documents](#)
[Help](#)
[Contact Us](#)

[My Details](#) | [My Strata Manager](#)

### Change Details

#### Change Details

Full Name :   
 ABN :   
 Email :   
 Letter Title :   
 Address Title :   
 Res/Bus Address :   
 Notice Address : ☐ Address is different from above  
 Levy Notice Address : ☐ Address is different from above  
 Co-Owner Addresses : ☐ Address is different from above  
 Home Phone :   
 Business Phone :   
 Mobile Phone :   
 Fax :

#### Mail Out Preferences

I hereby authorise MAXSOFT PTY LTD to treat my email address as being my address for service of notices and other correspondence to the extent permitted by law and acknowledge that any such notice or correspondence sent to my email address shall be deemed duly served upon me and accept responsibility for keeping MAXSOFT PTY LTD informed as to changes to my email address. ☐

Category	Email	Mail
Levy Notice	<input type="checkbox"/>	<input type="checkbox"/>
Correspondence	<input type="checkbox"/>	<input type="checkbox"/>

CANCEL
SUBMIT

#### Customer Information

**Account:** 02100004  
 Humphries P  
**Lot Number:** 00004  
**Unit Number:** 4  
**Plan Number:** 45645  
 Strata Plan No. 45645  
**Manager:** MAXSOFT PTY LTD


#### Building Information

**Address:** 4 Hirst Street SYDNEY NSW 2001  
**Number of Lots:** 5  
**GST Registered:** No  
**ABN:** Not Available  
**Financial Year End:** 30-Apr-2016





## Payments

On the Payments tab you can make a payment or download a Direct Debit form.



Viewing: Lot 00001  
Strata Plan No. 45645

CHANGE

LOGOUT

Font Size: [A-](#) [A+](#) [Reset](#)

Online Portal

[Home](#) [My Info](#) **Payments** [Reports & Documents](#) [Help](#) [Contact Us](#)

**Make Payment** | [Direct Debits](#)

### Make Payment

Please enter the payment amount that you wish to make. The amount shown is an indication of the amount outstanding based on the information available to StrataMax at this time. The amount can be modified. Refer to your levy notice/bill for more details.

Please Select the Lot(s) you wish to make payments for and check the amount to be paid. Click on the 'Calculate Total' button to calculate the total payment including any applicable fees.


Click on the 'Continue Payment' button to proceed to the next step.


**Payment Details**

Lot No	Building	A/c No	State
00005	FIFTH AVENUE	02100005	QLD
<input checked="" type="checkbox"/>	Building Levy		\$100.00
00001	4 HIRST STREET	02100001	NSW
<input checked="" type="checkbox"/>	Building Levy		\$0.00
Sub Total			\$100.00
Service Fee			\$0.00
Transaction Fee			\$0.00
GST			\$0.00
<b>Total</b>			<b>\$100.00</b>

**Important:** The pre-populated amount above only represents your current levy owed and may not include other applicable amounts. Please check the ledger card report under the Reports tab if one is available or check with your manager.

Please select the Card Type you will be using to make your payment with:

☒

☐

*Note: Fees will be calculated based on the Card Type and will be passed through to StrataPay for you to make your payment.*

**CALCULATE TOTAL**

**CONTINUE PAYMENT**

## Reports & Documents

Reports & Documents available to owners and committee members are setup by your Strata Manager and may vary to the screen shot below.

1. Highlight require Document/ Report
2. Click 'Download'

StrataMax

Viewing: Lot 00001  
FIFTH AVENUE CTS 12568

CHANGE

Font Size: A- A+ Reset

Online Portal

My Info Payments **Reports & Documents** Help Contact Us

Owner

### Owner Reports & Documents

The data used to generate reports is current as at 02:18 PM 24 April, 2015.

This message will appear on tariff and payment summary page. Owners Manage Users Type text

The current method of payment is by Credit Card.

#### Financial Reports

Financial Reports available at no charge.

- Aged Balance List [Download](#)
- Financial Statements (Current Year) [Download](#)
- Financial Statements (Last Year) [Download](#)
- Master List Report [Download](#)
- Owner Ledger Card [Download](#)

#### Administration Reports

Administration Reports available at no charge.

- Asset Register [Download](#)
- Committee Report [Download](#)
- Insurance Report [Download](#)

#### Disclosure Statement

Disclosure Statement for a fee of \$60.00 per request.

- Disclosure Statement [Download](#)

#### Meeting Agendas & Minutes

Meeting Agendas & Minutes available at no charge.

- 2014-10-30 AGM Minutes2014-10-30 AGM Minutes [Download](#)
- 2014-11-24 Committee Minutes2014-11-24 Committee Minutes [Download](#)
- 2015-01-25 Insurance Valuation2015-01-25 Insurance Valuation [Download](#)

#### Sales Certificate

Sales Certificate available at no charge.

- Sales Certificate [Download](#)

Descriptions of the reports and documents may be available, to view the description please click on the title of the report/document. This will display the description under the report/document title.

3. If a valid email address has been recorded for the User Account, this will populate in the 'Email Address' field and a copy will be sent to this email address or leave blank and click 'DOWNLOAD' for the report to come to screen

### Download Report

Once the report is generated it can be emailed as an attachment to the email address you enter below.

*Please note that this email address is only used for emailing the report as an attachment and for no other purpose. This email address is remembered for as long as you are logged in.*

Please enter your email address, or **leave blank** if you do not want it sent to your email.

Email Address:

DOWNLOAD

CANCEL

*In some instances reports may incur a fee. You will be redirected to the StrataPay secure website, once payment has been approved the report will be emailed to you or come to screen.*

Financials

Financials for standard search fee of **\$10.00**.  
(This fee covers you for a 24 hour period.)

Aged Balance List

Download

Asset Register

Download

Register of all assets belonging to a building

Committee Report

Download

Insurance Report

Download

Invoice Activity Report

Download

Descriptions of the 'Reports and Documents' may be available, to view the 'Description', click on the Title of the 'Report / Document'. This will display the 'Description' under the 'Report / Document' Title.

## Help

On the 'Help' tab you will find several menus: 'FAQ' (frequently asked questions), 'About StrataMax', and 'Useful Links'.

Viewing: Lot 00001  
FIFTH AVENUE CTS 12568

CHANGE

LOGOUT

Font Size: A- A+ Reset

Online Portal

My Info Payments Reports & Documents **Help** Contact Us

FAQ About StrataMax Useful Links

Frequently Asked Questions

**Q) What is StrataMax™?**  
StrataMax™ is the industry leading Community Management System that allows your manager to manage most aspects of administering your building or plan in an efficient and secure manner. It consists of specialised features that enable them to service your needs to the highest standards based on best practice. Visit [www.stratamax.com](http://www.stratamax.com) to learn more.

**Q) Why does it say "No Report Available at this Time" when I try to download a report?**  
This usually indicates that while this type of report has been made available, there is currently insufficient data to generate the report. If this is a newly available report, we recommend that you try again the following day.

**Q) What is Quick Pay?**  
Quick Pay is an easy way to pay your levies online without having to fully log into the website. It only requires you to enter your StrataPay™ reference number.

**Q) What is The MaxSoft Group?**  
The MaxSoft Group, the company that produces StrataMax™, is an industry-leading producer of Strata Management, Financial and related products and services. Visit us at [www.maxsoft.com.au](http://www.maxsoft.com.au) to learn more.

**Q) What is StrataPay™?**  
StrataPay™ is an advanced payment solution provided by The MaxSoft Group, used by StrataMax™ to offer online payment capabilities. Visit [www.stratapay.com](http://www.stratapay.com) to learn more.

**Q) Are my details kept private?**  
The MaxSoft Group is firmly committed to protecting your privacy while interacting with our content, products and services via the StrataMax™ web site. Please view our [Privacy Policy](#) for full details.

**Q) When I try to log on to approve invoices, I am getting a message that reads "Your account is pending. Please activate account before attempting to reset password?"**  
When invoices are first uploaded for your approval, if you are a Non Owner Office Bearer Approver you will be sent an activation email that requires you to click on a link to activate your account before you can access the Invoice Hub Portal. If you are unable to locate the activation email, contact your Strata Manager.

The Useful Links menu has links to the different State Act websites.

Information Links

Queensland

- Qld Body Corporate & Community Management Act 1997
- Sanctuary Cove Resort Act 1985

New South Wales

- Strata Schemes Management Act 1996 (NSW)

Victoria

- Owners Corporations Act 2006 (VIC)

Australian Capital Territory

- Australian Capital Territory - UNIT TITLES ACT 2001

South Australia

- South Australia Strata Titles Act 1988

Western Australia

- Western Australian Consolidated Legislation STRATA TITLES ACT 1985

Northern Territory


- Northern Territory - AGENTS LICENSING ACT

StrataMax™ is not responsible for content posted on these external pages.

## Request Password Reset

Forgot your password?

- Click on the link 'Having problems logging in'.



Font Size: [A-](#) [A+](#) [Reset](#)

LOGIN

Online Portal

Online Certificates

Help

QuickPay

Please enter the 9 digit StrataPay Reference Number found at the top right of your StrataPay Slip, then click on 'Quick Pay' to proceed with your payment.

**NOTE: No login is required to make payment via Quick Pay.**

StrataPay Reference

QUICK PAY

Sign In

Create an Account

Email

Password

[Having problems logging in?](#)

LOGIN

Don't have an Account but have a StrataMax ID?

Create an Account below.

CREATE

Did you know?

You can make payments using credit card via the Quick Pay or Payments pages.

- Enter your User Account Email Address
- Tick to confirm 'I'm not a robot' or enter the verification number/words (these will be different each time).

9. Click 'Submit'

An email will be sent to you with a link with to a token that you can use to reset the password.

The screenshot displays the StrataMax Online Portal interface. At the top, there is a navigation bar with the StrataMax logo, a 'LOGIN' button, and links for 'Online Certificates' and 'Help'. Below this, the 'Request Password Reset' section is visible, featuring a 'BACK' button and a form. The form prompts the user to 'Enter your Email and verify that you're not a robot to reset your password.' It includes an email input field, a checkbox for 'I'm not a robot', a reCAPTCHA widget, and a 'SUBMIT' button.

Note: The above screenshot may vary depending on Internet Browser versions.

## FAQ

1. **Who do I contact if I have forgotten my User Account Details?**  
Go to the website [www.stratamax.com.au](http://www.stratamax.com.au) and click on 'having problems logging in?' which will step you through resetting your password. Refer to 'Request Password Reset' above.
2. **I did not activate my User Account in time, what do I do now?**  
When you attempt to log in click on the link to send a new activation email.
3. **Who do I contact if someone has shared access to my property however I want their access removed?**  
Any queries about shared accounts should be directed your Strata Manager who will then forward any requests to StrataMax for removal of shared access. Shared Access will only be removed based on requests from Strata Managers.
4. **I am a Committee Member, why do I not have access to Committee Reports?**  
Committee Access is automatically granted if the email address on the committee roll records matches the email address you use to log in. If your email address is different; when you log into your account you will be prompted to request committee access. Refer to Committee Access above.
5. **The report is not appearing when I click on the report name?**  
Refer to the below link for assistance with Popup Blockers. Please note the only browsers supported for the Invoice Hub or Owners Portal are Internet Explorer, Chrome, Firefox and Safari. <http://www.stratamax.com/PopUpHelp.aspx>
6. **I own additional lots and the manager may use StrataMax as their software provider; how do I find out what the StrataMax ID is?**  
Log onto your User Account and go to My Properties and click on 'Forgot StrataMax ID', enter your email address and click on submit. An email will be sent to you detailing StrataMax ID's that are assigned to lots that have your email address recorded within the roll.