

StrataMax Intro Letter

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The StrataMax Intro (Introduction) Letter is a feature of StrataMax that has been designed to be sent to owners and committee members with any helpful information required about StrataMax; At the very least, it should include the Owners email address to create a StrataMax Portal account. This article covers how this letter can be made and amended, and for the instruction on setting this letter using the **Roll - Change of Owner** and **Change of Detail** report sets using the **Report Distribution** window, see this article [here](#).

Here is a sample letter, which can be downloaded and used to import into a new StrataMax Intro Letter in the **Merge Letters** menu: [Welcome Letter - Option.docx](#) □

«LetterHead»

«Today»

«NameAndAddressAuto»

Dear «RollOwnerLetterTitle»,

Re: «CompanyTitle»

As a lot owner, you can access information from your body corporate records. You may visit our office, pay a statutory fee, and request specific reports. Alternatively, you can access the same information online at a lower cost.

To access the StrataMax Portal:

1. Go to www.stratamax.com.au
2. Enter your email and click Login
3. If you already have an account, enter your password
4. If not, follow the prompts to create one

If you use the email address listed below, your property can be linked to your account.

If no email address is listed, please provide one so we can update our records. If your email has changed, contact us before creating an account.

Email Address: «RollOwnerEmailAddresses»*

For help with setting up your account and linking properties, visit:

<https://portalhelp.stratamax.com/help/stratamax-portal>

You can also access additional information and services through the portal, including your body

corporate webpage with updates and community news.

Yours faithfully,

«BuildingAccountManager»

Body Corporate Manager

Creating StrataMax Introduction Letter

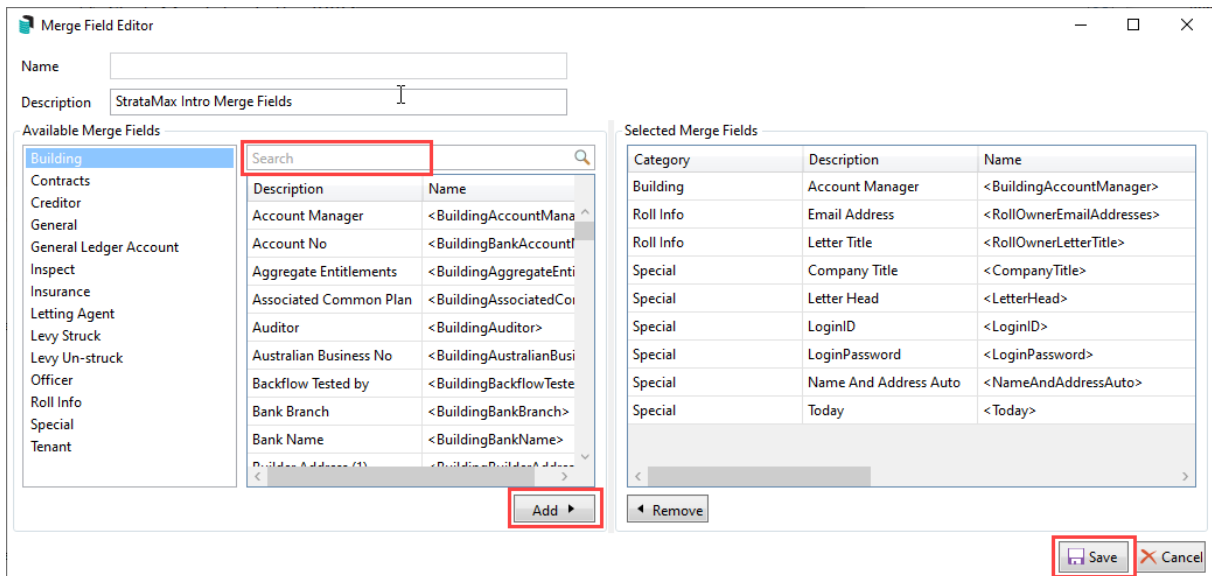
The below instructions will assist in creating a StrataMax Introduction Letter, controlled using Merge Letters. These instructions adopt the new merge field naming convention using the **Report Distribution** window.

If this is an edit to a StrataMax Intro Letter that uses the old style merge fields, remember to remove these merge fields from the template first. This will allow you to edit and add to the Merge Field Editor when replacing merge fields.

1. Search or select **Merge Letters**.
2. Select *Merge Letters* and click *Add* to create a new letter.
3. Review the *Category* list from the *Merge Field Editor* and *Add the* required merge fields to the *Selected Merge Field* area.

Ensure that the *LoginPassword* and *LoginID* fields are included for the *StrataPay ID* and *Password* fields.

Tip: use the Search field to search for a field within a category quickly.

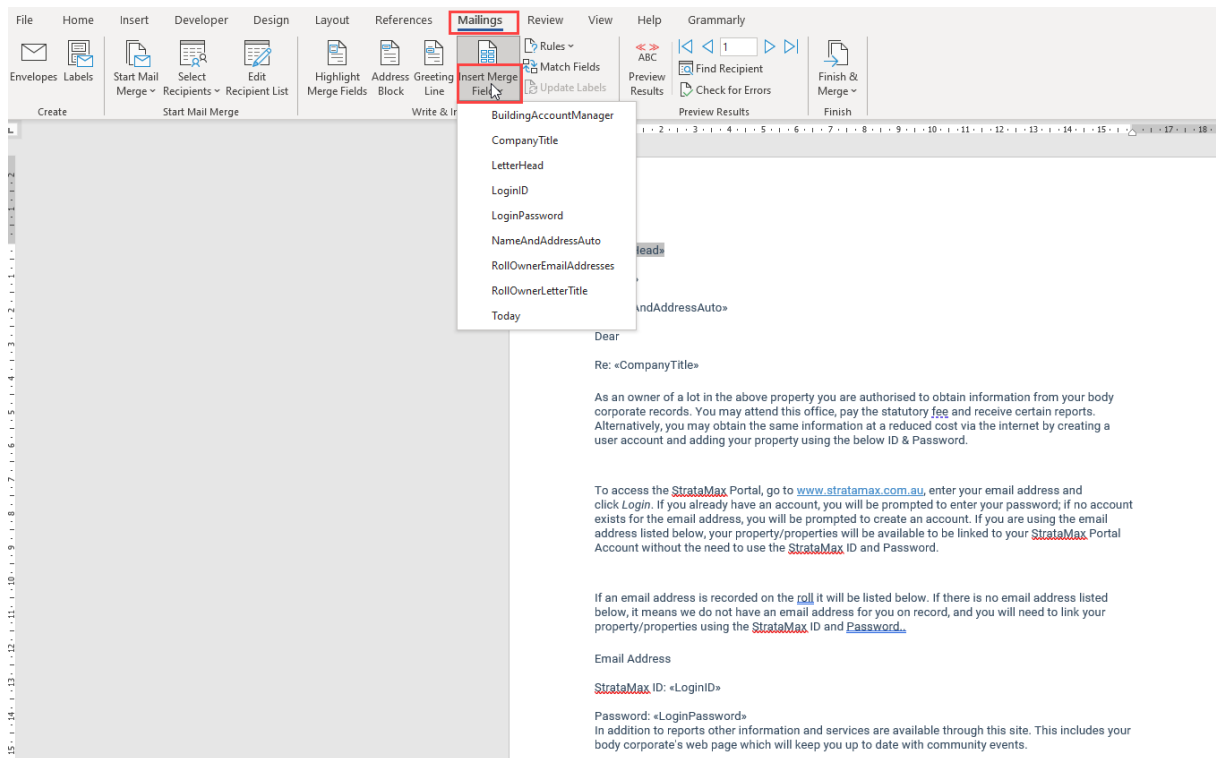


4. Click *Save* once completed.
5. From the *Microsoft Word Document*, update the document, ensuring that the merge fields are inserted as needed. Click *Save* and *Close Word*.

Editing StrataMax Introduction Letter

To edit a StrataMax Introduction Letter, if the Merge Fields are being replaced, it's essential to open the Microsoft Word document first and remove the merge fields. Then, the *Merge Field Editor* can insert any new merge fields. Editing the letter can also include an update to the formatting or text within the letter, and the below instructions detail all of these processes.

1. Search or select **Merge Letters**.
2. Select *Merge Letters* and select the existing letter from the list. Use the *search bar* to find this document if preferred.
3. If this edit is to adjust the merge fields, select *Template* to open the document in Word. Remove any unrequited Merge Fields by selecting them and deleting them from the document.
4. Amend any further formatting or text adjustment to the document.
5. Click *Save* and *Close* once complete. This will have updated the letter for any formatting or text adjustment.
Proceed to the below steps if adjusting the Merge Fields available in the letter.
6. If the Merge Fields are to be replaced or edited based on step 3, click *Fields* to open the *Merge Field Editor* and add/delete or rename any merge fields as required. Click *Save* once the list has been updated.
7. Click *Template* to open the document again in Word, re-insert any new merge fields using the Mailings tab, and Insert Merge Field into the areas requiring the updated merge field.



8. Click *Save* and *Close* once complete.

Producing Welcome Letter

Refer to our [Report Distribution](#) article for an example on how to produce a [Report Set Welcome Pack](#).