DocMax | StrataMax Integration

Last Modified on 23/06/2025 3:48 pm AEST

This article is designed to be used as a reference guide to all the areas in StrataMax that integrate with *DocMax* and allow document attachment.

We also offer a completely free 'DocMax Basics' online course, which you can enrol ir<u>here</u>! Please see the <u>StrataMax Online Courses</u> page for more details, including the coupon code required to enrol for free.

Building Information

Building Photos and Building Plans can be added to DocMax and viewed directly from the *Building Information* menu. The documents must firstly be saved to DocMax using the appropriate Category for the hyperlink to be accessible from *Building Information*;

- 1. Open DocMax.
- 2. *Add Documents* using your preferred method and save for each property as required with the Category set as either 'Building Photos' or 'Building Plans'.

Building Photos 🔀 Building Plans 🗙

To view the saved documents from StrataMax;

- 1. Search or select *Building Information*.
- 2. Using the search bar type in 'Photo' or 'Plans' for quick navigation to the Building Photos/ Plans field.
- 3. Click on the hyperlink to view the saved record.

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	Candessa Ashbury Committee Member 👔			
	Mr Alfie Andrews Chairperson			
	Steven Jobs Building Manager 👔			
Strata Renewal Committee Established	(Not Set)	☆		
Interim or Final Occupation Certificate Date	×	\$		
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Building Plans	Add a plan using the Building Plans category in DocMax Building Plans Building Plans 11	\$		
Bank Accounts	Bank BSB Account Balance SCM 124-367 123456789 39215.81	☆		~
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Common Property Register

- 1. Open the *Common Property Register* and select one of the items in the list, and the *OK* button.
- 2. Locate field 22; *Doc Id*, and right-click in the cell under the *Data* column.
- 3. When the *DocMax* Select Document window appears, locate the required document and click Select Document.
 - The *Doc ID* field will now have a document ID number.
- 4. Click Save.
- 5. To open the document, simply right-click the ID number.

Common Property Register ROYAL HEIGHTS	\$ 456455	Document View
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8 Address (1) 9 Address (2) 10 Address (3) 11 Description of Area authorised for use 12 Conditions 13 Conditions 14 Conditions 15 Adjudicator Order to Consent 16 Lot A/c Affected 17 Lot Number Affected 18 Date Authority Withdrawn 19 Text Description 20 By Law Liability 21 Common Property Group 22 Doc Id 4 III	306	Document COMMON PROPERTY APPROVAL MOTION EXAMPLE Document Profile Assigned Status Action Da Custom Properties Document Details Property Document I Building 456455 ROYAL HE Common Assignment Approximation Boology Frankling Ut Details Owner Category Status Status Status Common Assignment Approximation Boology Frankling Common Assignment Approximation Assignment Approximation Approximation App
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Contracts Register

- Open *Contracts* and select one of the items in the list and click*OK* to open the contact, or click the *Cancel* to create a new contract.
- 2. Locate field 31; *Doc ID* and right-click in the field.
- 3. When the *DocMax Select Document* window appears, locate the required document and click *Select Document.*
 - The *Doc ID* field will now have a document ID number.
- 4. Click Save.
- 5. To open the document, simply right-click the ID number.

Contracts Register ROYAL HEIGHTS 456455	Document View
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21 Date of Withdrawal of Financier 22 Workers Comp Number 23 Termination Date 24 Next Option Renewal Date	Document Profile Assigned Status Action Da
25 Option Notice Period 26 Last Renewal Date 27 Increase Rate	Custom Properties Document Details
28 Increase Due 29 Expiry Date 30 Common Property Group	Property Document Building 1439 THE OAKES
31 Doc Id 307	Lot Details
29 of 29	Category V Zategory V

Other Registers

- 1. Open Other Registers.
- 2. *Insert* a register from the *Category* list.
- 3. Populate the *Reference* and *Location* fields, and click *Apply*.
- 4. Click File > Create DocMax Record.
- 5. When the *DocMax Select Document* window appears, locate the required document and click *Select Document.*
- 6. To open the document again, click the *View Doc* button.

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Document Amendment Register

- 1. Open *Document Amendment Register*, and locate field 8; Doc ID.
- 2. Right-click the cell under the Data column, and the DocMax Select Document window will appear.
- 3. Locate the amended document and click the *Select Document* button.
 - $\circ~$ The Doc ID field will now have a document ID number.
- 4. Click Save.
- 5. To open the document, right-click the ID number.

Document Amendment Register ROYAL H	EIGHTS 456455	Document View
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TaskMax Work Order

- 1. Open TaskMax.
- 2. Open an existing Work Order in the list orcreate a *New Work* Order.
- 3. Under the *Invoice* section, in the bottom left, click in the *Doc ID* field.
- 4. When the *DocMax Select Document* window appears, locate the required document and click the *Select Document* button.
- 5. By clicking in the Doc ID field again, options will appear to View, Clear or Add from DocMax.

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TaskMax Quotes

- 1. Open *TaskMax*, and click the *Show Quotes* button.
- 2. Select the issued quote, and click the *View Doc* button.
- 3. When the *DocMax Select Document* window appears, locate the required document and click the *Select Document* button.
- 4. Click the View Doc button again to open the document in DocMax again.
 - When *Document View* is selected, the button in *TaskMax* will be greyed out.
- 5. Select *Save and Close* from the *Document View* window.

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File Edit Reports	Home	
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	Property Document Building	Options
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٠ III	Owner	O All Mine
1 of 2	Category	View Status Current
Manager: Lisa McCoustra No of Lots: 38	Title Insurance Renewal 2	
ROYAL HEIGHTS	Description	
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Sinking Fund Forecast

- 1. Open *Budget Update*, Add a new forecast and save the report.
- 2. Then click *File > Add Report to DocMax.*

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File			_				
	Edit Comments		Sinkin	ig Fund Forecas	t		
	Add Report to Do	cMax N	ears	Amount	Per Annum	Start Date	
	View DocMax Rep	ort kð	1	50000	50000	29/05/20	
	Close						
	Add De	elete	Edi	t	Rep	ort	Close

- 3. A Windows Explorer menu appears to locate and select the report.
- 4. Check the information pre-filled into the Description, Document Title, and Subject fields.

- In the *Send to StrataMax* field, enter a *Y* if the document is being uploaded to the StrataMax Portal, or an *N* if not.
- If a *Y* was entered above, enter the required *Document Group* number (1-9) on the StrataMax Portal, into the *StrataMax Group* field.
- If the report is being uploaded to the Strata Portal, enter the required date to remove it in *Remove from StrataMax* field.

Sinking Fund For	ecast Report to DocMa	x	×
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Send to StrataMax	Y		
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- 5. Click *OK*, and a notification will confirm that the document has been added to DocMax and will display the Doc ID number.
- 6. To view the document, back in the Sinking Forecast menu, click *File > View DocMax Report*.

Sinking Fund Forecast				(2
File Edit Comments	Sinking Fund	Forecast			
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View DocMax Report	10	2000000	200000	08/05/15	
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Roll Document Attachment

- 1. Open *Roll*, select the required lot from the list, and click*OK*.
- 2. Click the *Change of Details* button.
- 3. Click on the Select button.
- 4. When the *DocMax Select Document* window appears, locate the required document and click the *Select Document* button.
- 5. Click Save.
- 6. By clicking the *View* button, the document will open in DocMax.

Insurance - View Policy

- 1. Open Insurance, select the appropriate policy, and click OK.
 - Generally, the main policy is *901 BUILDING*, and that would be the policy to attach the building's insurance policy document to.
- 2. Click the View Policy button.
- 3. The document will open in *DocMax* along with the document properties.

If a notification appears saying '*No document attached*' then the document hasn't been added to the policy through *DocMax*. How to do this is outlined in<u>this section of the Insurance article</u>.

Insurance Claims - View Claim Document

- 1. Open *Insurance Claims* and double-click the relevant claim from the list of existing claims.
- 2. Click the *Document* button to open the document in *DocMax*.

If the button is clicked, but the document doesn't appear, then it hasn't been added in DocMax. How to do this is outlined in <u>this section of the Insurance Claims article</u>.

Payment Entry

In the Payment Entry screen, there is a *Select Document* button located at the top of the screen, so that an invoice can be selected.

- Payment Entry					_		×
0820 THE GARDEN TAMERS	Date	30/09/2022 💌	Select Document	Bank Balance: 29,884.27			0
The Garden Tamers	Amount	0.00					
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PO Box 261]	Compliance					
CLIFTON BEACH QLD 4879]						
]	Valid O Not Valid					
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