DocMax | StrataMax Integration

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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 in here! Please see the StrataMax Online Courses 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.

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.

Contracts Register

1. 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.
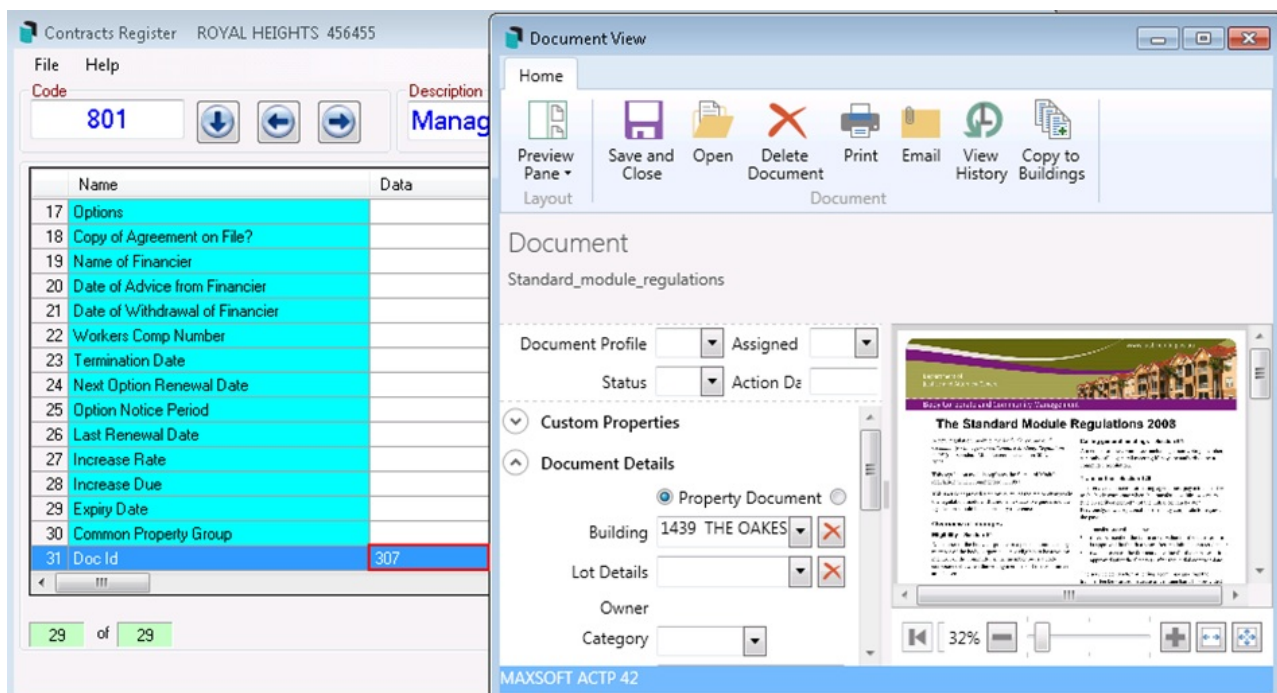

Other Registers

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.
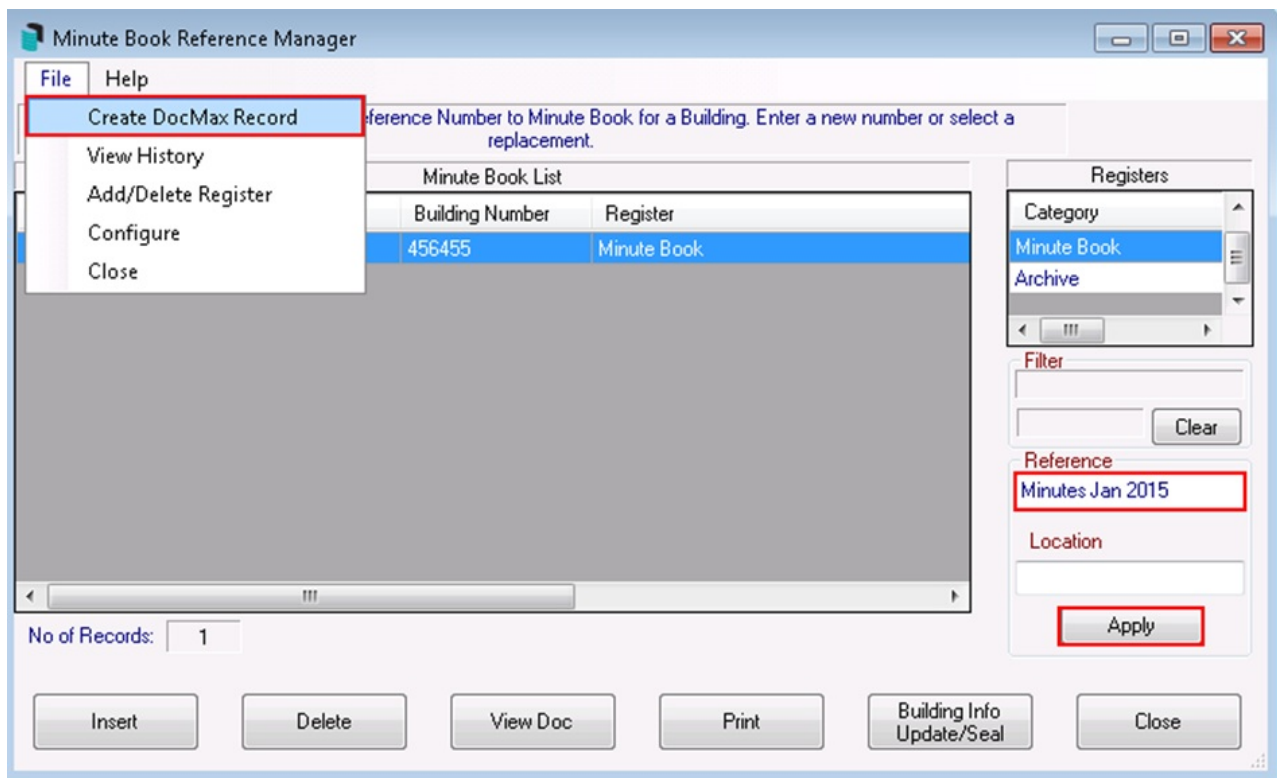
# Document Amendment Register

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.
   - The *Doc ID* field will now have a document ID number.
4. Click *Save.*
5. To open the document, right-click the ID number.
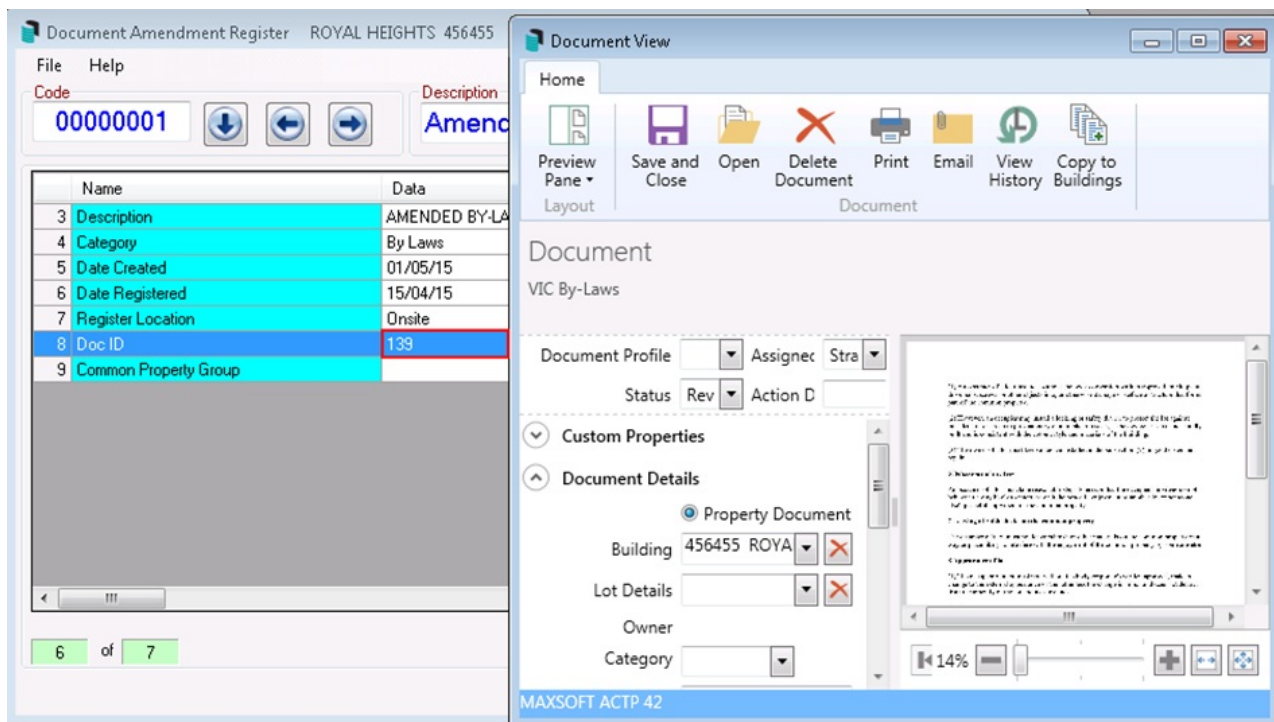
TaskMax Work Order

1. Open *TaskMax*.

2. Open an existing Work Order in the list or create 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*.
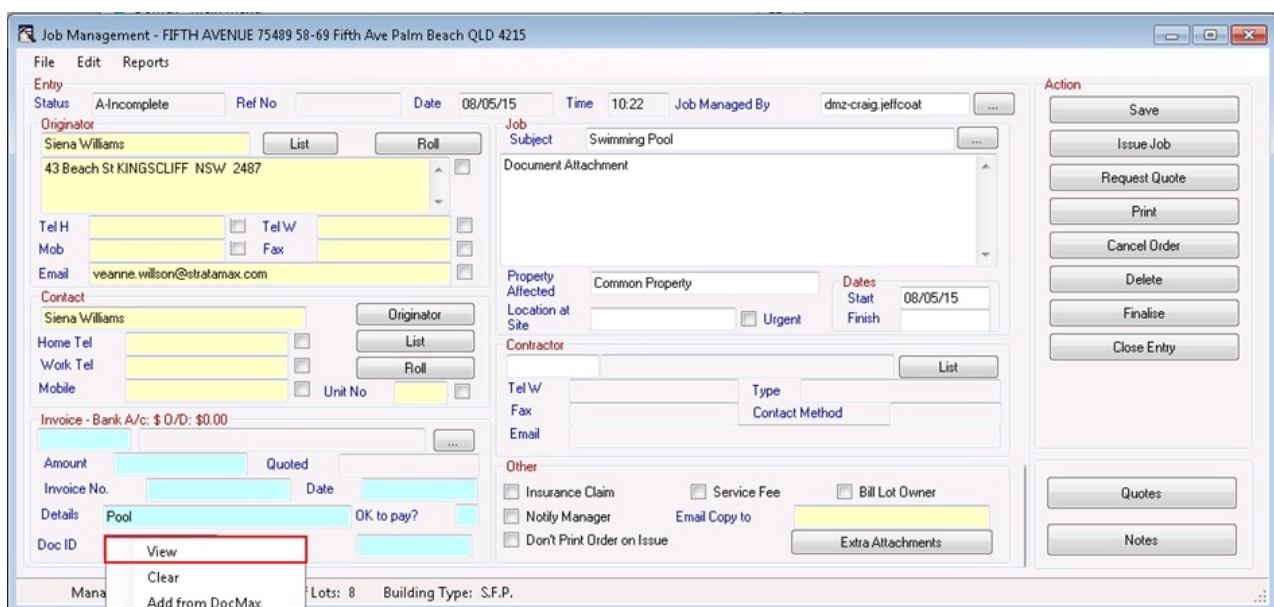
TaskMax Quotes

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.
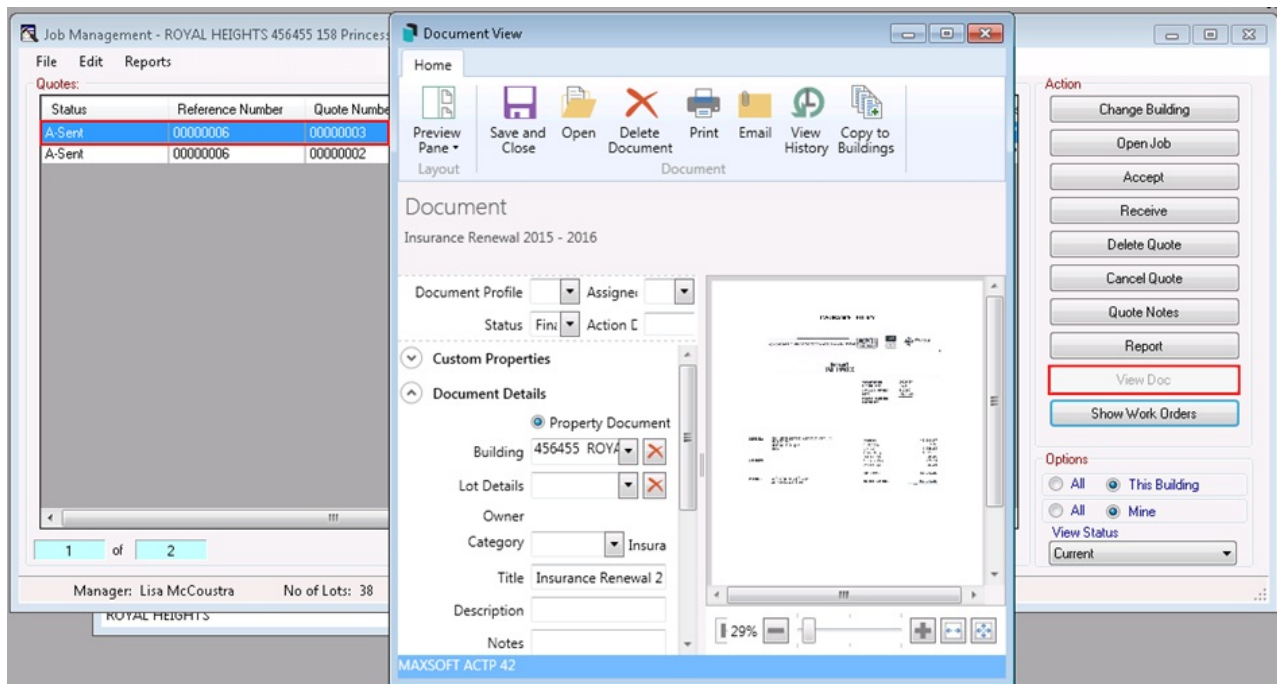
Sinking Fund Forecast

1. Open **Budget Update**, Add a new forecast and save the report.

2. Then click *File > Add Report to DocMax.*
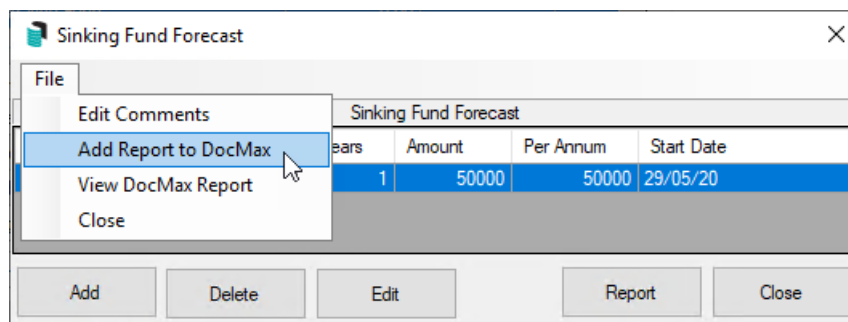
3. A Windows Explorer menu appears to locate and select the report.

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.

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.*

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 this section of the Insurance article.

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 this section of the Insurance Claims article.

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

Account | 0820   THE GARDEN TAMERS | ... | Date | 30/09/2022 ▼ | **Select Document** | Bank Balance: 29,884.27

Name | The Garden Tamers

Amount: 0.00

ABN: 23 796 421 613

Address | PO Box 261

CLIFTON BEACH QLD 4879

Compliance
No compliance status found
◉ Valid   ○ Not Valid