

StrataMax Portal | Online Certificates

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This article covers how to set up StrataMax for the *Online Certificate* service, which can be used by certificate applicants to obtain an updated certificate on the *StrataMax Portal*, prior the settlement or sale date of the property.

Giving access to the following online certificate is different to allowing owners to log in and purchase a certificate.

If a lot owner is currently in legal action for outstanding amounts, ensure that all amounts due have been invoiced to the lot. Alternatively, do not print the cover letter with the original request, so that online access is not given. This ensures that any further requests are requested directly and any legal fees (if applicable) can be invoiced prior to the sale of the property.

How it Works

After the initial certificate has been issued to the owner or solicitor, any subsequent certificates or disclosure statements can be ordered online via the *StrataMax Portal* within 30 days of the date of issue. Payment via credit card will be required at the time of the request, and the funds will be deposited into the managers account, unless in NSW where the funds will be deposited into the building's bank account.

StrataMax charges an administration fee for each report, which is \$11.00 incl. GST. This is invoiced to the strata manager and issued monthly. StrataMax manages the delivery of the certificate, and handles any enquires that relate to the non-delivery or unavailability of the certificate. For any other queries the applicant will be referred to the strata manager.

In order to use this service, the applicant will need an *Access ID*. This *Access ID* needs to be set up in StrataMax by the strata manager, so that it is automatically generated and included in the cover letter, which needs to be included with the initial certificate.

A link to the *Online Certificate* service can be placed on the strata manager's website:
<https://www.stratamax.com.au/Portal/general/services/OnlineCertificates.aspx>

The request will be processed by StrataMax, and the fee will be paid to the strata manager, or the building (NSW only - according to relevant state legislation). To allow applicants access to this feature, there are some setup steps to be completed.

- Report Access Setup (login to the portal to allow access).
- Cover Letter Setup (edit / review cover letter to setup with Access ID).
- Using the Service (steps for applicant to use service for updated report).

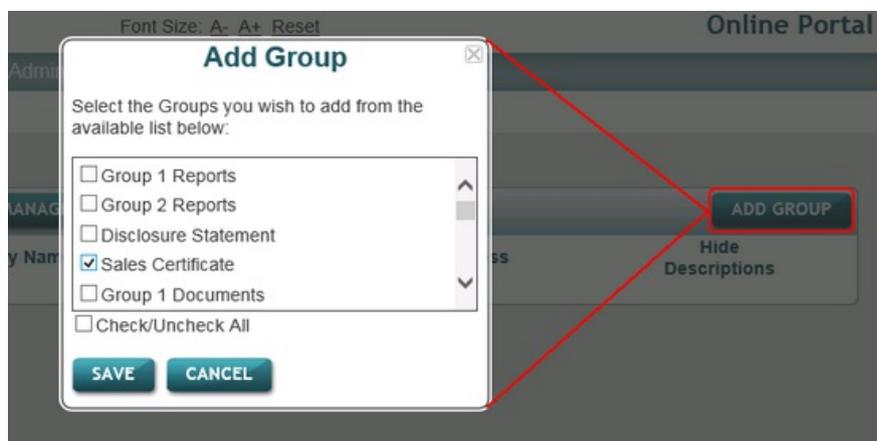
Report Access Setup

The first step is to configure the *StrataMax Portal* to allow the access.

1. Open the StrataMax Portal and log in (credentials are set up in the [Security Setup](#) menu).
2. Click the *Reports & Documents* tab, then click *Manage*.
3. Click the *Select User Type* drop-down menu, and select 'Anonymous'.



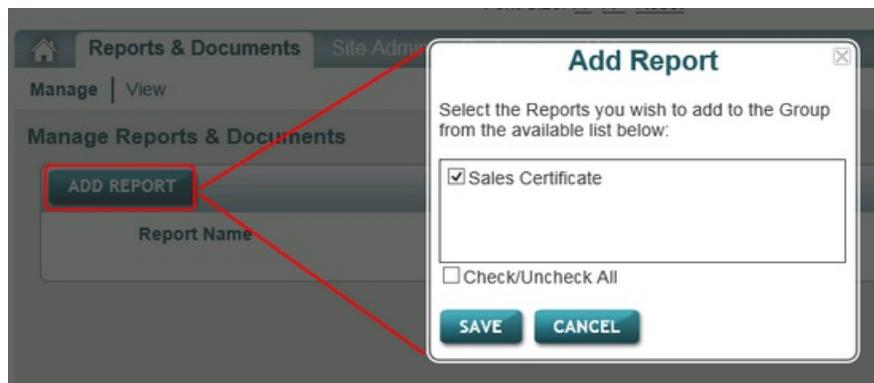
4. If the *Sales Certificate* (Section 205 in QLD, Section 109 in NSW) box is not available, click the *Add Group* button to make it available.
5. Tick the *Sales Certificate* then click *Save*.



6. Once the sales certificate has been added to the display list, hover mouse to the right hand side until pencil icon appears, then click it.
7. Amend the *Display Name* field as required.
8. Click the *Access* drop-down menu and change it to 'Access is Granted - 'Fee Applies'.
9. Set the *Charge Amount* required.
10. Once complete, click the 'Save' icon.



11. Highlight magnifying glass icon, which will be to the left of the *Group Name*, then click it.
12. Click the *Add Report* button on the next page.
13. Tick the *Sales Certificate* box then click *Save*.



14. The *Reports & Documents* tab will now display the sales certificate details.

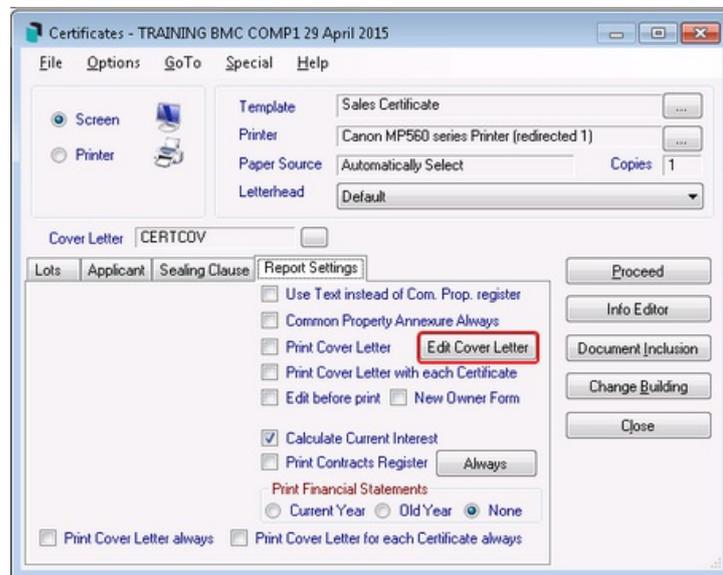


15. Click the *Back to Group List* button, then log out of the *StrataMax Portal*.

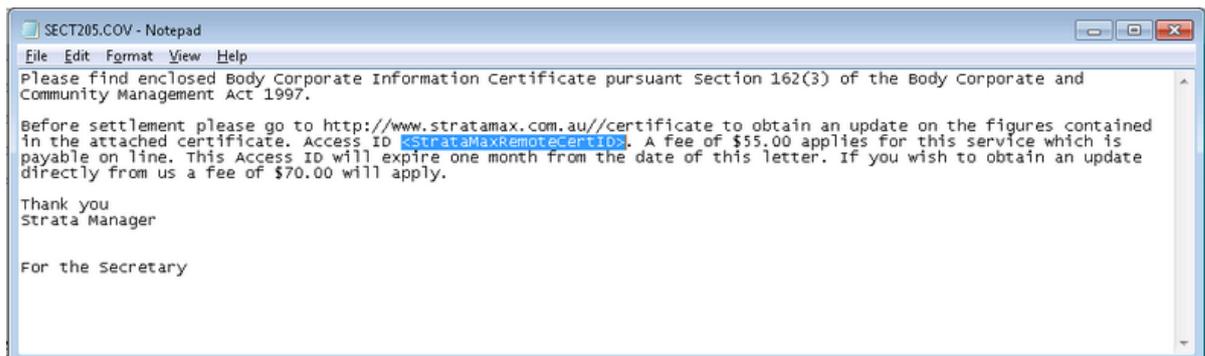
Cover Letter Setup

You will also need to ensure that you set up the Cover Letter accurately. This will result in a Reference Number being allocated for the purchaser of the certificate. When this letter is produced, the supply of this reference number will be used by the purchaser on the web site when they purchase the final Statement / Certificate. When the certificate is printed from the website it will not print the cover letter as this is printed from the office when first supplying the certificate.

1. Open the *Certificates* menu.
2. Click the *Report Settings* tab, then click the *Edit Cover Letter* button.



3. Select *Global*, and Notepad may now appear.
4. Amend the letter as required. However, do not change or remove the field. If it is not present, it will need to be added as per the screenshot below:



5. Click *Print Cover Letter* OR *Print Cover Letter with each Certificate*.
6. Click *Close*.

Using the Service

Once the certificate is available to purchase, it will be available to any person with the *Access ID*. Please refer owners to the following Online Help article, to learn how to use Online Certificates: <https://portalhelp.stratamax.com/help/certificates-disclosure-statements>