# StrataMax Desktop

Last Modified on 19/08/2025 4:14 pm AEST

StrataMax provides a 'User' configurable desktop with icon groups that can be customised, and items for security groups can be set up depending on whether the user is allowed to edit Desktop Groups for the *Users* security group. The purpose of this feature is to enable the icons to be accessed quickly for faster processing within office roles. The desktop also allows for various menus to be running at the same time.

If a user does not have permission to access a particular function, the icon will appear on the desktop but is not active - identifiable by its grey colour. Icons irrelevant to the building or company selector will also be inactive. For example, if a user chooses a building that does not have a sub-group, the icons relating to the subgroups will be inactive. Similarly, if the user has selected a building, GLMax Companyrelated icons will be inactive. Conversely, if a company has been selected, icons that are only relevant to buildings will be inactive.

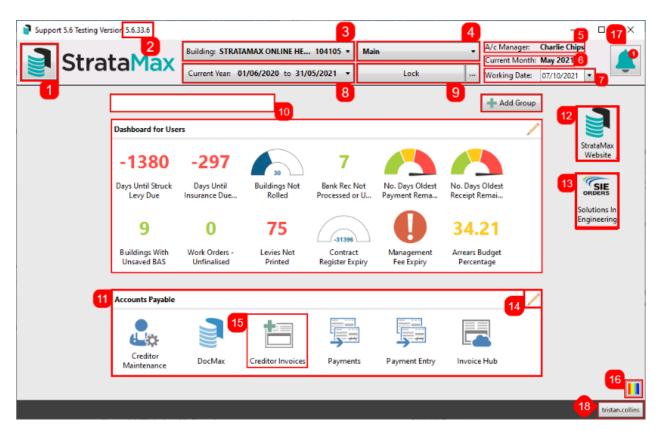
### **Security Permissions**

- *Customise menu groups & items for your security groups* If allowed, the user will only be able to edit groups that have been assigned to security groups of which they are members.
- *Customise your own menu groups & items* If allowed, a user will be able to customise their own desktop; changes will not impact any other users.

8 Permissions For	- • •
Name Augusta	
BCMax GLMax DocMax	
□ 😥 Permissions	
🖥 😥 Building	
🐼 Delete Subgroup	
Subgroup Setup	
🖨 💓 Data Entry	
Edit account group	
🗄 😴 Menus	
🖉 Account Group Setup	
Trial Balance (Group)	
group	Close

## **Desktop Overview**

This section provides an overview of the StrataMax Desktop. More detailed explanations on their use has been provided further down in this article.



- 1. StrataMax Logo Button: Click this to open a screen with all StrataMax icons.
- 2. *StrataMax Version:* Displays the StrataMax version installed. The *Release Notes* page contains all release notes, detailing version changes and feature updates.
- 3. *Building Selector:* Displays a list of active buildings in StrataMax.
- 4. *Main/Sub-Group Button:* Click to switch between the *Main* building and *Sub-Group* building, used for utility billing, marinas, etc.
- A/c Manager: Displays the account manager for the currently selected building. The Account Manager is set in Building Information, and more Account Managers can be added to StrataMax in Account Manager Edit.
- 6. *Current Month:* Displays the current month of the currently selected building. If this is still displaying the previous month, then a *Month End Rollover* will need to be completed for this building.
- 7. *Working Date:* This should default to your system's current date/today's date, and in most cases should not be changed.
- 8. Year Selector: Click this to change between the financial years of the currently selected building.
- 9. Lock Button: Click to lock the currently selected building. See Lock Building for more info.
- 10. StrataMax Search: Use this to search for icons, contact names, contact email addresses, 9-digit

StrataPay numbers, lot addresses.

- 11. *Desktop Group:* These are used to group StrataMax icons together. These can be restricted to specific *User* and/or *Groups.* See *Creating A New Desktop Group* for more info.
- 12. StrataMax Website: Click to open the StrataMax website home page.
- 13. Solutions In Engineering: Click to open the Solutions in Engineering Reports screen.
- 14. Edit Desktop Group: Click this to edit the Desktop Group. See Editing a Group.
- 15. StrataMax Icon: Each *icon* represents an area of StrataMax, which has it's own set of menus and functions. These can be added to the desktop by adding them to a *Desktop Group. See Editing a Group.*
- 16. *Colours:* Click this to select the colour of the desktop background.
- Dashboard & Notification Bell. The Dashboard & Notifications Bell will appear with a number indicating there are important messages to read. Details of StrataMax Version Updates including *Release Notes* will be listed and any completed *Building Transfers*.
- 18. The username button displays the user name of the current user. Click this to display the log out option.

### **Building Selector**

- 1. Display the list of buildings in your portfolio.
- 2. Display the list of companies (usually there is only one company (COMP1)).
- 3. Show or hide the various filters available (see the section below for an explanation of each filter).
- 4. Will save the current selected filter option as default for the current logged in user, so that it will always be active when using the *Building Selector* list.
- 5. Will remove the selected filter option as default for this user.
- 6. Indicates that this building has been locked.
- Type the building number or name to search for it in the list. Part of the name or number can be typed - it doesn't have to be the start.
- 8. Open the Base Building.
- 9. Opens the Master Chart.
- 10. Active Building Totals can be quick viewed from the bottom right corner.

BC	Max Building	2 GLMax Companies Recent Buildings	Recent Con	npanies	Name / Number:	
$\odot$	Filters	Buildings			<b>U</b>	
Sub	o-Group:	▼ 🔒	× Acc	count Manage	er: 🔹 🗐 🗙	
Ina	ctive/Lost:	Active	Ma	inagement Of	fice: 🔹 🔹	
Stat	te:	<b>•</b>	X GS	T Registered:	⊖Yes ⊖No 4	5
Fin	ancial End M			oice Hub:	○ Yes ○ No	
1 111						
			Ace	count Groups:	: OYes ONo	
$\cap$	Number	Name	Year Start	Year End	Account Manager	
	641351	BENOWA TOWERS	01/09/2020	31/08/2021	Sarah Jones	
<u>.</u>		BENOWA TOWERS COOMERA TOWERS	01/09/2020 01/02/2021	31/08/2021 31/01/2022	Sarah Jones Craig Jeffcoat	
				,,		
	6 <sup>346</sup>	COOMERA TOWERS	01/02/2021	31/01/2022	Craig Jeffcoat	
	6 <sup>346</sup> 6431	COOMERA TOWERS CRAIG VILLAS KEEP	01/02/2021 01/12/2020	31/01/2022 30/11/2021	Craig Jeffcoat Bob Brown	
	6 346 6431 1345131	COOMERA TOWERS CRAIG VILLAS KEEP HARBOUR VILLAS	01/02/2021 01/12/2020 01/07/2020	31/01/2022 30/11/2021 30/06/2021	Craig Jeffcoat Bob Brown Lana Clarke	
	6 346 6431 1345131 54651	COOMERA TOWERS CRAIG VILLAS KEEP HARBOUR VILLAS LOGAN TOWERS	01/02/2021 01/12/2020 01/07/2020 01/02/2021	31/01/2022 30/11/2021 30/06/2021 31/01/2022	Craig Jeffcoat Bob Brown Lana Clarke Sarah Jones	
	6 446 6431 1345131 54651 131	COOMERA TOWERS CRAIG VILLAS KEEP HARBOUR VILLAS LOGAN TOWERS ONE HOUSE	01/02/2021 01/12/2020 01/07/2020 01/02/2021 01/01/2021	31/01/2022 30/11/2021 30/06/2021 31/01/2022 31/12/2021	Craig Jeffcoat Bob Brown Lana Clarke Sarah Jones Sarah Jones	
	6 46 6431 1345131 54651 131 1521	COOMERA TOWERS CRAIG VILLAS KEEP HARBOUR VILLAS LOGAN TOWERS ONE HOUSE STRATAMAX ONLINE HELP	01/02/2021 01/12/2020 01/07/2020 01/02/2021 01/01/2021 01/01/2021	31/01/2022 30/11/2021 30/06/2021 31/01/2022 31/12/2021 31/12/2021	Craig Jeffcoat Bob Brown Lana Clarke Sarah Jones Sarah Jones Tristan Collins	
	6 446 6431 1345131 54651 131 1521 64132	COOMERA TOWERS CRAIG VILLAS KEEP HARBOUR VILLAS LOGAN TOWERS ONE HOUSE STRATAMAX ONLINE HELP SYDNEY TOWERS	01/02/2021 01/12/2020 01/07/2020 01/02/2021 01/01/2021 01/01/2021 01/06/2020	31/01/2022 30/11/2021 30/06/2021 31/01/2022 31/12/2021 31/12/2021 31/05/2021 28/02/2022	Craig Jeffcoat Bob Brown Lana Clarke Sarah Jones Sarah Jones Tristan Collins Craig Jeffcoat	
	6 446 6431 1345131 54651 131 1521 64132 651356	COOMERA TOWERS CRAIG VILLAS KEEP HARBOUR VILLAS LOGAN TOWERS ONE HOUSE STRATAMAX ONLINE HELP SYDNEY TOWERS VICTORIA PALMS	01/02/2021 01/12/2020 01/07/2020 01/02/2021 01/01/2021 01/01/2021 01/06/2020 01/03/2021	31/01/2022 30/11/2021 30/06/2021 31/01/2022 31/12/2021 31/12/2021 31/05/2021 28/02/2022	Craig Jeffcoat Bob Brown Lana Clarke Sarah Jones Sarah Jones Tristan Collins Craig Jeffcoat Craig Jeffcoat	

#### **Building Selector Filters**

Max		Building:	STRATAMAX ONLINE HELP 1521 -
BCMax Buildings GLMax Companies Recent Buildings Re	cent Companies Name	/ Number:	
Filters Buildings			
1 Sub-Group:	5 Account Manager:		• 🗔 🗙
2 Inactive/Lost: ● Active ○ Inactive/Lost	6 Management Office:		- 🗔 🗙
3 State:	7 GST Registered:	Yes 🔾	No
4 Financial End Month:	8 Invoice Hub:	Yes 🔿	No
	9 Account Groups:	Yes 🔾	No

- Sub-Group: Buildings have have a sub-group, which can be *Air Conditioning, By-Laws, Utilities*, or *Marina.* See *New Sub-Group Setup* for details.
- 2. Inactive/Lost: See *Lost/Inactive Buildings* for more info.
- State: State is set during the building setup, but can be changed using the *State* field in *Building Information*.
- 4. Financial Month End: Select a month to filter all buildings that have a financial year end in that month. This is set during the building setup.
- 5. Account Manager: This is configured in *Building Information*, in the Account Manager field.
- 6. Management Office: This is configured in *Building Information*, in the *Management Office* field.

- 7. GST Registered: Filters buildings that are GST Registered. See GST Setup for more info.
- Invoice Hub: Filters buildings that currently have Invoice Hub enabled. SeeInvoice Hub / Setup & Configuration for more info.
- 9. Account Groups: Buildings in VIC. Filters buildings that have account groups configured. See *Account Group Setup* for more info.

### **Year Selector**

Underneath the *Building Selector* there is a *Year Selector*. If the selected building has any old or historical years in StrataMax, these will be listed when it is clicked.

Building:	MEETING HUB	260619 -				
Current Year:	01/01/2020 to 3	1/12/2020 🔻				
Current Year:	01/01/2020 to	31/12/2020				
Old Year:	01/01/2019 to	31/12/2019				

There are limitations on what icons, menus, functions, and features are available in the old or historical years, so you will notice that certain menus on the StrataMax Desktop will become inactive whilst the old or historical year is selected.

When a *Year End Rollover* is completed, that year will be added to the list of available years in this menu. Also, when a building is transferred, it will also include the old and historical years.

## **Creating a New Desktop Group**

1. Select 'Add Group'

P Support 5.6 5.6.120.63				– 🗆 X
StrataMax	Building:     FELICIA KEEP       Current Year:     01/11/2024 to 31/10	107128 ▼         Main           0/2025 ▼         Lock	A/c Ma     Current November 2024     Workin: 03/12/2024	° (*
Search	٩		1 + Add Group	
Dashboard for Admi	nistrators		A 1	
Image: A start of the start	Image:	0 💧	0	StrataMax Website

- 2. Enter a 'Title' for the 'Group'.
- 3. From the drop down list, select users that will have access to the group; you can give access to yourself, or alternatively a user-group that you are a member of.
  - A group of menu items cannot be assigned to both a User and a User Group or multiple User

#### Groups.

Search		
Daily Tasks	dmz-jessica.carroll 🔻	Save Changes
Add Menu Item	Accounts Payable Administrators dmz-jessica.carroll Insurance Reception / Admin Search Agents Strata Managers	
	Users	

- 4. Select 'Add Menu Item'.
- 'Select Menu Item' to add to the desktop group by selecting a 'Category' and then the specific 'Menu' Item, or alternatively using the 'Search' function.

Daily Tasks										/
EBMax	Search Building	Creditor Commitments	Payments	EFT Manager	Bank Balances	StrataCash	Add / Change / Delete	Transaction List	Bank Rec.	

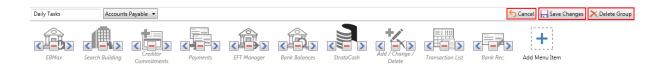
- 6. Repeat steps 4 & 5 until all 'Menu' Items have been selected for the group being created.
- 7. Using the '<' & '>' buttons move the 'Menu' Item to the left or right of the Group.
- 8. Click 'Save Changes'.
  - Based on the above example; the group will now be available for any user that is a member of the 'Accounts' security user-group.
  - The above steps can be completed for all Groups that you want to create; there is no limit to the number of menu items you can add to a group or the number of groups you can create. A scroll bar will be shown if required.

### **Editing / Deleting a Group**

A group can be edited by following the below steps:

- 1. Click on the 'Pencil' symbol at the end of the group to edit.
- 2. To move menu items left or right click the '<' or '>' buttons.
- 3. To delete a menu item click the '-' button.
- 4. To add a new menu item select 'Add Menu Item'.
- Select 'Menu Item' to add to the desktop group by selecting a 'Category' and then the specific 'Menu' item(s), or alternatively using the 'Search'.
- 6. The group 'Title' & the 'Assigned User' or 'User-Group' can be edited if required.
- 7. Click 'Save Changes' to save any changes made or;

8. Click 'Cancel to revert back to the original 'Menu' items.



9. To remove a 'Group' click 'Delete Group'. This will delete the Group for any members that may have been associated in the Group.

If deleting a Desktop Group that is assigned to a group of users, it will change all of that groups users desktops. If a group is deleted unexpectedly; use Log Viewer to identify who removed the group by searching the Description field for Removed desktop group.

### StrataMax Logo Button

All icons in StrataMax can be located by clicking the StrataMax logo icon in the top left of the StrataMax desktop. Upon clicking the StrataMax logo icon, you will see a list of categories on the left. Each category can be clicked to display all of its icons, which are also split into sub-categories.

3	Account Mai	ntenance											
	*	<b>€</b> s			<b>€</b> s				31	31			
Accounting & Taxation	Add / Change /	Appropriate	Auto Entry Trans	Auto Reverse	Global	Import Fees from	Job Invoices	Journal	Month End	Month End	Post Standing	Standing Journal	Standing
Banking	Delete	Surplus/Deficit	Maker		Appropriation	BCMax		Preparation	Rollover	Setup	Journals	List	Journals
Creditors & Payments													
Levies & Arrears	Transaction Entry	Transaction Report Manager											
Owners & Debtors													
Property Info	Reports												
Administrator						<b>%</b>	-s	150\$	▏▐▆▕				
Integrated Modules	Auditors Report	Budget Reports	Create Merge Data	Create Merge Data (Global)	Figure Link Report	Financial Compare	Financial Statements	Funds Management	Master List	Quick Lists	Quick Transaction List	Stored Report	Sub Group Update Report
Search				¢/									
? Help	%			\$/\$									
	Tax Year Report	Transaction List	Transaction Report	Trial Balance									
	Managemen	t Fees											
										≣s			
	A/c Manager			Export Pages	Import Buildings	Invoice Link	Management	Management	Process		Zero Balance		
	Income Query	Debtor Import	Edit Invoice List	Printed	as Debtors	Manager	Fees	Fees Report	Recoveries	TRMax	Accounts		
	Taxation												
	<b>26</b>	2	20 BAS	2	9%		E						
	ATO ECI Merge	BAS Info Editor	Business Activity	Edit Tax Rate List	GST Setup	Master List A/c	Master List Tax	Non-Mutual					
	and converge	SAS and Editor	Statement	Concreating the Elst	Con Setup	Group	Code	Income					

## StrataMax Search

Searching for a contact is available using the search bar in the top right hand side of the screen.

Functionality exists for searching using the contact name, creditor name, email address, lot address field or the **whole** StrataPay reference number.

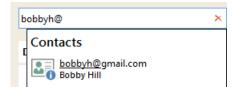
These options will assist for owners who do not know what building they belong to, and offer the contact details including the positions of what building the contact is associated with. Options also include in some of these areas to launch directly to the *Roll*.

When using the StrataMax Search, it will include all of the below:

#### Contacts

Typing into the StrataMax Search bar the partial / full name / lot address field / email address or 9 digit StrataPay ID will return results of a *Roll contact*. Clicking on the contact will open their *Contact Details* screen.

When searching by email address; results based on the email address will only show once the @ symbol has been included.



#### Creditors

Entering the partial or full name of a creditor into the StrataMax Search bar will return results matching the name under the heading 'Creditors' and if selected, will open the Creditor Maintenance record.

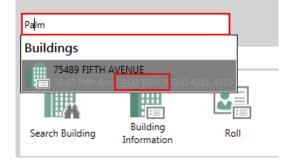
#### **Building Names/Number**

Typing into the search bar the partial / full name of the 'Building' / 'CTS' / 'SP' / 'OC' number will produce results based on 'Building Names' / 'Building Number'.

Royal	
Buildings	
456455 ROYAL HEIGHTS	4978, 4978

#### **Building Address**

Typing into the search bar the partial / full name of the 'Building Address' will produce results based on the 'Location 1' and 'Location 2' on all properties within the portfolio.



When a result is clicked for both 'Building Names' and 'Building Address', the Building Information Manager will open with this information.

• 'Buttons' / 'Menu' Options. All 'Classic' buttons and 'Menu' options will be available for searching and adding to a 'Group' (if security options have been allowed for required 'Button' / 'Menu' option).

Daily Banking &	Daily Banking & Accounts Payable										/
Bank Balances	Bank Rec.	Receipts Report	Creditor Commitments	Invoice Hub	Payments	Cash Payments	Print Deposit Forms	Journal Preparation	Compliance		

From the search results you can select the menu item. This function will search menu items and synonyms, e.g. typing invoice could bring up the Creditor Invoice menu item.

The list of potential menu items that a search will deliver in its results will display the 'Category', 'Sub Category', 'Menu' item name and 'Searched Synonym in brackets'.

For example, a user wants to enter an invoice for a creditor in the system. They could type the word 'Invoice' and would see the following results:

invoice	-								+ Add Group
Menus									1
Levies & Arrears > Levies, Arrears & Invoices						<b>.</b>			
Invoice Entry (Second Debtor) Levies & Arrears > Levies, Arrears & Invoices			Ē	ĪQ		$\sim$			
Invoice Hub Creditors & Payments > Invoices & Payments	or ients	Payments	EFT Manager	Bank Balances	StrataCash	Add / Change / Delete	Transaction List	Bank Rec.	
Administrator > Management Fees									
Levies & Arrears > Levies, Arrears & Invoices									Save Changes X Delete Group
Invoice Printing (Second Debtor) Levies & Arrears > Second Debtors									
Creditor Commitments (Invoice) Creditors & Payments > Invoices & Payments									
Edit <u>Invoice</u> List Administrator > Management Fees									
Job Invoices Accounting & Taxation > Account Maintenance									
Levy Invoice Code Edit Levies & Arrears > Levies, Arrears & Invoices									

- (Group italic) Creditors & Payments> Invoices & Payments> Creditor Invoice.
- (Group italic) Levies & Arrears> Levies (Sub Group italic) \*if applicable, Arrears & Invoices> Invoice Entry ('Menu' item name - Bold - Searched term underlined).
- Synonyms have also been included for various terms used within the industry, e.g. typing the various names of sales certificates will show the appropriate menu item.

205		
Menus		
	<b>; (Section <u>205</u>)</b> Debtors > Owner Reports	
II	А	l
EBMax	Search Building	Cr Comr



## Launch Multi-Window

Users can open multiple windows and switch between / close them using the Multiple Windows section at the bottom of the StrataMax desktop.

This allows users to access various functions from within StrataMax and other modules at the same time. For example, a user may be part way through entering creditor invoices and then receive a phone call from an owner; the user can open a new window by selecting the menu item and changing building if required.

StrataMax				🗣 Bank Reconciliation - FIFTH AVENUE 75489 25 May 2015 (GST Registered)						
			File Options GoTo SCM Help Statement Entry/Processing Bank Reconciliation Report Cheque Receipt Tagging							
				CENU/FIUCES	Bank Hec	conciliation Report   Uhi	eque Heceipt I agging			
	Search					Stateme	ent No. All			
	Jealen		Date	Туре	Details		Reference Number	Amount	Balance I	
	Daily Tasks		22/0E/1	00001	Brought forwa		000001	-357.90	0.00 -357.90 Y	
				5 DEPOSIT 5 DEPOSIT			000001 000002	-357.90	-357.90 Y	
				00002	Brought forwa		000002	001.00	-715.80	
				5 DEPOSIT			000003	-357.90	-1073.70 Y	
			23/05/1	5 DEPOSIT			000006	-500.00	-1573.70 Y	
📄 Creditor Commitmer	nt Entry FIFTH AVENUE 75489 25 May 20	15	23/05/1	00003 5 DEPOSIT	Brought forwa Agent Deposit		000007	-357.90	-1573.70 Re -1931.60 Y	
File Options Got	to Help		23/05/1		Agent Deposit		000008	-357.90	-2289.50 Y	
New Entry 👻	Change Building	Info Save								
riow chuy	Change Building Account Info Save			۰ الله الله الله الله الله الله الله الل						
	Close Ledger (	Card Cancel			Currer	nt Statement	Prin	t		
Creditor	Creditor									
Code	Name									
		Select by ABN						Change Buildin	ng Close	
Date Amount Details Invoice No. More Info	History A	DGST	Villiams Unit No: 1 ntitlements: 10 ments: 0	Car St		Contact Home: Business: Mobile: Facsimile: Email: veanne.	willson@stratamax.c	Account Status Account Balance Admin Paid to: Sinking Paid to: Direct Debit Interest Debit Da	31/05/15 31/05/15 Not Set up	
Batch Total Bank Bank Bank Bank Bank Bank Bank Bank		Resident 43 Bea	Agent Nomin ial/Business Ad	dress	43	Initial Password: In vice of Notice Address I Beach St NGSCLIFF NSW 2487	,	A/c Manager: Jr Levy Notice Addres: F I Real Estate Ag P0 Box 555 JEWELL QLD 47	is gents	
0.00 2289 Hold Total		Addresses Resident 43 Bea KINGS0	Agent Nomin ial/Business Adu sh St CLIFF NSW 24	ee Settings dress 87	43	vice of Notice Address Beach St NGSCLIFF NSW 2487		Levy Notice Address F I Real Estate Aq PO Box 555 JEWELL QLD 4 <sup>+</sup>	is gents	
0.00 2289 Hold Total	150 V Current V	Addresses Resident 43 Bea KINGS0	Agent Nomin ial/Business Adi sh St CLIFF NSW 24	ee Settings dress 87	43 Kii	vice of Notice Address Beach St NGSCLIFF NSW 2487		Levy Notice Address F I Real Estate Aq PO Box 555 JEWELL QLD 4 <sup>+</sup>	gents 158	

The same Menu Item cannot be opened more than once; for example a user cannot open two Creditor Invoices windows.

### **Colour Selection**

The BCMax Desktop allows you to change the background colour scheme or set back to the default colour.

- 1. Click on the icon on the bottom right corner of the StrataMax Desktop.
- 2. This will expand into a colour slide bar.

- 3. Move your mouse over the colour bar to select the desired colour.
- 4. To revert back to the default colour click 'Default', and to change to the default grey colour, click 'Grey'.