

# StrataMax Portal | Owner View Access

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This article covers how Strata Managers can preview the StrataMax Portal for testing and troubleshooting purposes. This is particularly useful when assisting owners.

If an owner has contacted you because they are experiencing issues with or have questions about the StrataMax Portal, you can refer them to the [Owner's Portal Help](#), which is designed for owners and committee members, and covers everything they need to know about the StrataMax Portal.

## Owner View Access

A manager account with *Standard* or *Administrator Privileges* will grant access to the *Owners View Access* function. This enables managers to impersonate an owner, committee member, or non-owner office bearer and identify what user accounts have been created for each lot.

1. Log into the StrataMax Portal with a manager account with *Admin Privileges*.
2. Select the *Owners View Access* tab.
3. Enter the name or the number of the building to view and click *Search*. This will list the buildings that matches the search criteria.
4. Click on the building name.

**Owner View Access**

The Owner View Access feature gives you the ability to view the StrataMax Online Portal as one of your Lot Owners. While in this view, specific areas have been enhanced, such as bypassing the payment of a Report or Document.

NOTE: Actions carried out while viewing as an Owner are being recorded against your User Account.

**Select the Building of the Lot Owner**

Please enter your search criteria and click the 'Search' button.

Building Name:  Building Number:  State:

**SEARCH** **RESET**

Building Name	Building Number	State
CRAIGS USER ACCOUNTS	12334	QLD
<input checked="" type="radio"/> USER ACCOUNT	45641	QLD

5. The list of owners for this building will appear.

- This list is synchronised with the **Roll** menu in StrataMax.
- If an owner has an active Portal account, a magnifying glass icon will appear under the *Active User Account* column. If there is no magnifying glass icon, there are two possible reasons for this:
  - The user has not created a Portal account. In which case send them the link to the Portal Help article, explaining how to create an account: [Creating a StrataMax Portal Account / Portal Help](#)
  - The user has created a Portal account with an email address that differs to the one that is saved in the **Roll** menu. If this is the case, ask them to create an account with the same email address you have in the **Roll** menu, or you will need to change the email address in their contact card, in the **Roll**.
- If the owner has an active Portal account and is a committee member and has logged into their Portal Account with the email address recorded in their contact card in the **Roll** and **Office Bearers** screen (it's critical that both of these screens are using the same contact card), a 'Yes' will be displayed under the *Office Bearer* column. If the 'Yes' is not present, this indicates the office bearer has not yet logged into their Portal account.
- To identify the email address used by the lot owner for portal access; click on the magnifying glass icon.

6. Click the *View* link to view the lot as that owner.

- User accounts email addresses are identified to assist users with owners who may have forgotten their login email address.



### Owner View Access

The Owner View Access feature gives you the ability to view the StrataMax Portal as one of your lot owners.

While in this view, specific areas have been enhanced, such as bypassing the payment of a report or document.

NOTE: Actions carried out while viewing as an owner are being recorded against your StrataMax Portal Account.

Please select a building and then the lot to view as an owner.

**BACK TO BUILDING SEARCH**

Lots for Building Number:

Account Number	Name	Lot	Unit	Office Bearer	Active Portal Accounts
<a href="#">View</a> 02100001	[REDACTED]	00001	1		
<a href="#">View</a> 02100002	[REDACTED]	00002	2		
<a href="#">View</a> <b>6</b> 0003	[REDACTED]	00003	3		1
<a href="#">View</a> 02100004	[REDACTED]	00004	4		
<a href="#">View</a> 02100005	[REDACTED]	00005	5		
<a href="#">View</a> 02100006	[REDACTED]	00006	6		1

\*Office Bearer column indicates if the lot has committee access on their existing StrataMax Portal Account; if no active StrataMax Portal Account exists this will always be blank. Additional help can be found [here](#).

## Office Bearer View

If an office bearer is selected as an owner to view, the following screen will appear to provide the option to either view the lot as an owner or an office bearer. If the office bearer approves invoices on the **Invoice Hub**, the office bearer view will enable viewing of the invoices on the **Invoice Hub** just as the office bearer would see it, however invoices cannot be approved or queried. Also, if the person / office bearer in question has never approved an invoice before, or there currently isn't an invoice to approve, the **Invoice Hub** tab won't be visible.

1. Ensure the committee member has been added as an **Office Bearer** in the property in StrataMax and if the contact is an Owner of a lot in the **Roll**, select the *Owner of Lot* field and select the associated lot account.
2. Sign in to the StrataMax Portal with a manager account.
3. Once signed in, click the *Owners View Access* tab, located on the menu bar.
4. Enter the name or the number of the building to view and click *Search*. This will list the buildings that matches the search criteria.
5. Hover over the building and a blue icon will appear next to the building name to identify the building is highlighted.

**Owner View Access**

The Owner View Access feature gives you the ability to view the StrataMax Online Portal as one of your Lot Owners. While in this view, specific areas have been enhanced, such as bypassing the payment of a Report or Document.

NOTE: Actions carried out while viewing as an Owner are being recorded against your User Account.

**Select the Building of the Lot Owner**

Please enter your search criteria and click the 'Search' button.

Building Name: 
 Building Number: 
 State:

Building Name	Building Number	State
CRAIGS USER ACCOUNTS	12334	QLD
<input checked="" type="radio"/> USER ACCOUNT	45641	QLD

- The list of owners for this building will appear. If an owner is a committee member, a 'Yes' will be displayed under the *Office Bearer* column. If the 'Yes' is not present, this indicates the office bearer has not yet logged into their Portal account with the email address recorded in Office Bearers and their contact card to gain Committee level access.

**Owner View Access**

The Owner View Access feature gives you the ability to view the StrataMax Online Portal as one of your Lot Owners. While in this view, specific areas have been enhanced, such as bypassing the payment of a Report or Document.

NOTE: Actions carried out while viewing as an Owner are being recorded against your User Account.

Please select a Building and then the Lot to View as an Owner.

**Lots for Building Number: 45641**

Account Number	Name	Lot	Unit	Office Bearer	Active User Accounts
<input type="button" value="View"/>	02100001 BLOGG M	00001	1	<input checked="" type="checkbox"/>	<input type="button" value="View"/> 1
<input type="button" value="View"/>	02100002 BLOGG M	00002	2		
<input type="button" value="View"/>	02100003 BLOGG M	00003	3		

- Click the *View* button.
- A pop-up appears *Choose the View Mode*; under the *Office Bearers for Lotlist* click the *View* button next to the required committee members.

**Choose the View Mode** ✕

Our records indicate that there are one or more active office bearer relationships in Portal.  
You can view the site using only the owner perspective.

**VIEW AS OWNER**

OR

Choose an officer to view the site as an Owner Office Bearer

**Officer Bearers for Lot**

	Code	Office Held	Full Name	Reference Name
<b>VIEW</b>	00000005	Chairperson	M Blogg	BLOGG M

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## Non-Owner Office Bearers

Non-Owner Office Bearers can be granted access to Committee Reports and Documents on the StrataMax Portal. Complete the below process in order to provide this access:

1. Ensure the Committee Member has been added as an *Office Bearer* in the property in StrataMax and that they are not linked to a lot.
2. Sign in to the StrataMax Portal with a Manager account.
3. Once signed in, click on *Non Owner Access* tab, located on the menu bar (a).
4. Enter the Building Name or Building Number required to view and click *Search*.
5. Select the property required from the results displayed.
6. Click *Add* next to the Office Bearer to grant access (b).
7. A pop-up window will appear asking to confirm access, click *Yes* to proceed and complete the process (c).

## Non Owner Access

[BACK TO BUILDING SEARCH](#)

## Non Owner Office Bearers for Building Number: 11

Code Number	Office Held	Name	Email Address	Invoice Reports & Hub Documents	Active Portal Account
00000001	Body Corp. Manager	Training Team	training@stratamax.com	<a href="#">Add</a>	
00000005	Building Manager	Steven Jobs	s.jobs@icloud.com	<a href="#">Add</a>	

## Add Reports &amp; Documents

By pressing Yes, you will be adding Reports & Documents access to this office bearer. If they don't have a StrataMax Portal Account, they will receive an email to create one and access will be granted once they complete this process.

Do you want to add Reports & Documents access to this office bearer?

[YES](#) [NO](#)

If the user has an existing StrataMax Portal account this access will be automatically granted. If the user does not have an existing StrataMax Portal account, they will be sent an email inviting the user to create an account.