

Strata Managers Portal

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This page introduces the **Strata Managers Portal** an exciting new feature designed to extend the power of the StrataMax desktop application beyond the office. Seamlessly integrated with StrataMax, the Managers Portal gives team members fast, convenient access to key information and important documents via a web browser or mobile device, without needing to open the full application.

With the Strata Managers Portal, users can quickly view essential details, retrieve documents from DocMax, and even upload new documents on the go - making everyday tasks simpler, faster, and more flexible.

Welcome to the Strata Managers Portal

Your comprehensive strata management solution

Buildings

View all your buildings and properties on an interactive map with location details and quick navigation.

Contacts

Manage and communicate with owners, committee members, contractors, and other stakeholders in your strata portfolio.

Contractors

Search and find contractors that have been used across your buildings, view their details and locations on an interactive map.

Contractor Invoices

View and manage invoices from contractors across your portfolio, track payment status, and review invoice history.

Document Management

Search, organize, and access all your important strata documents with advanced filtering options.

Financial Analysis

Analyze cashflow, income, and expenses across your entire portfolio with interactive charts and reporting.

Management

Track Account Manager performance metrics, compliance, and business insights across your portfolio.

Reporting & Analytics Coming Soon

Access detailed reports and insights to make informed decisions for your strata communities.

Tasks Coming Soon

Track and manage tasks, maintenance requests, and action items across your properties to ensure nothing falls through the cracks.

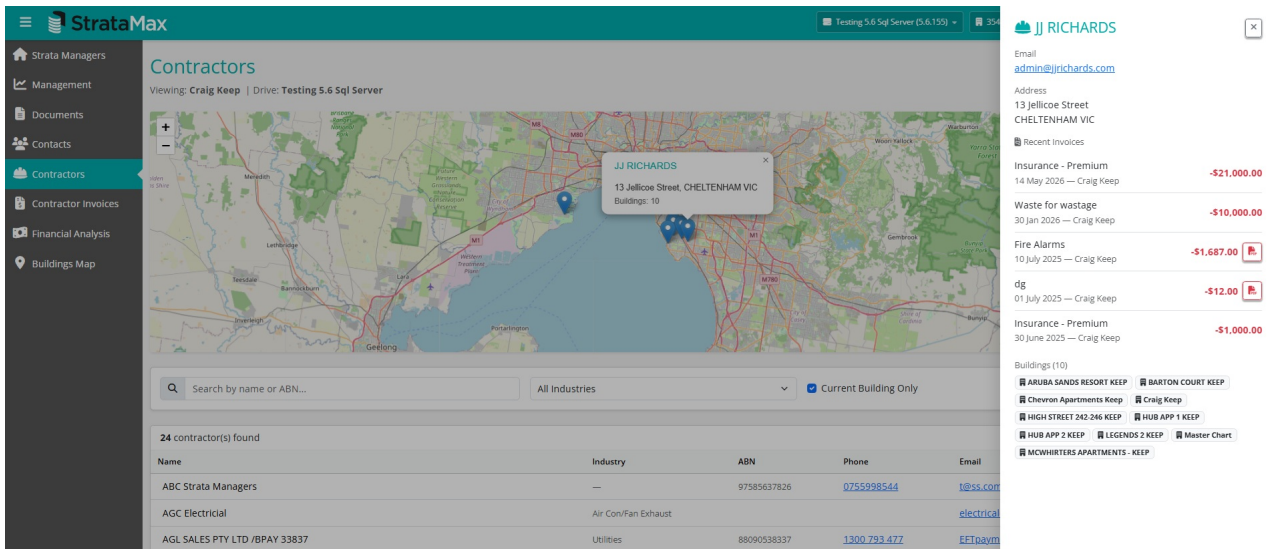
Building Inspections Coming Soon

Create and review building inspections across your portfolio to ensure compliance and maintain property standards.

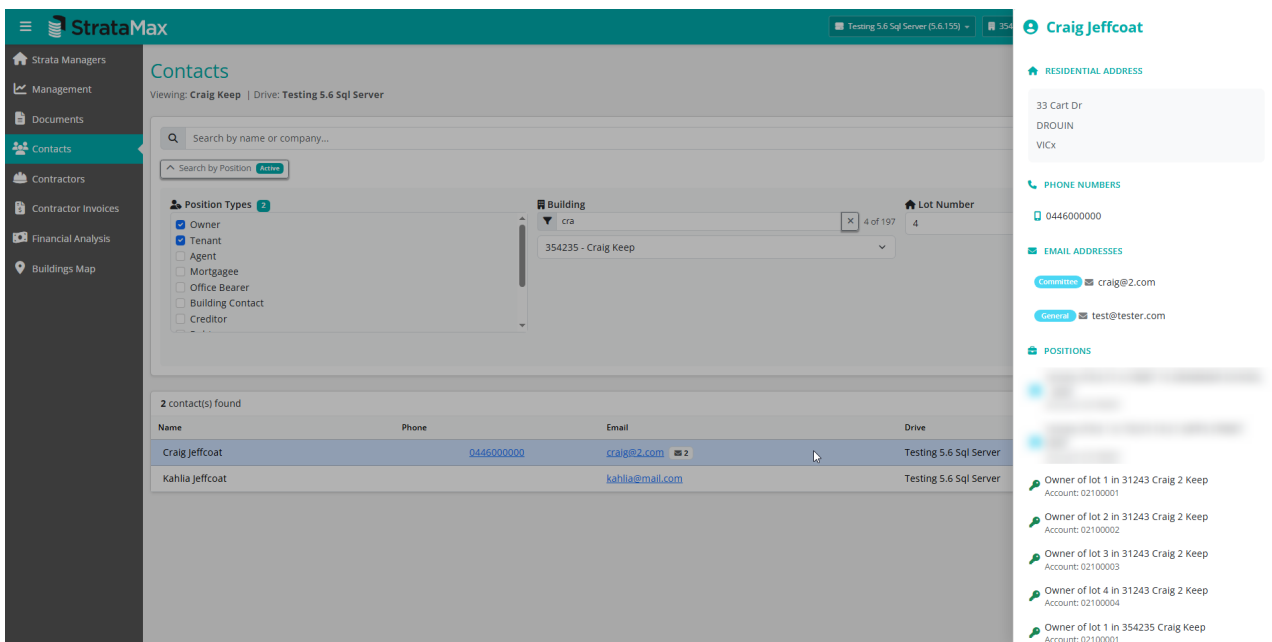
Get started by selecting an option from the navigation menu

Some of the functions initially planned for the Strata Managers Portal include:

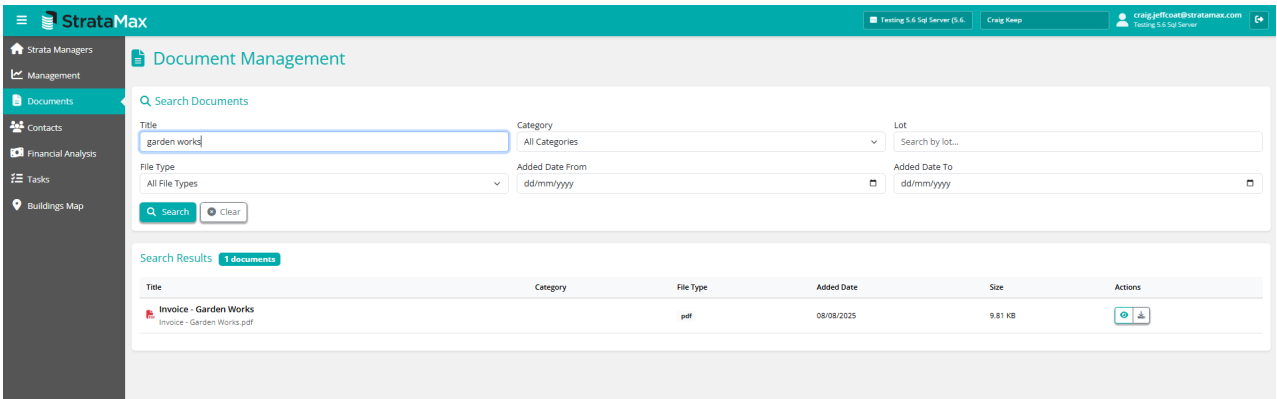
- Available via browser & mobile devices.
- Seamless integration with the StrataMax Application.
- Look up key building information including module & type, insurance, location, levy & financial information, meeting dates, key contacts etc.
- To assist with after hours calls search contractors and view contractor invoices



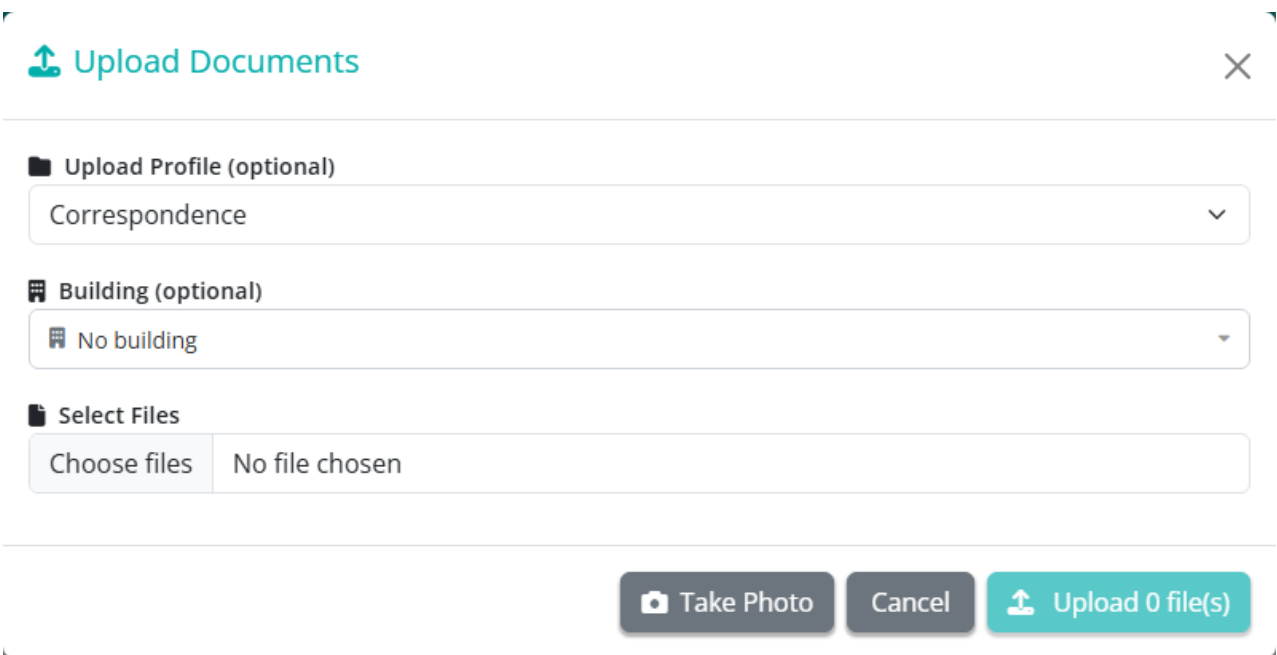
- Search for contacts including from the roll, office bearers (committee), creditors etc.



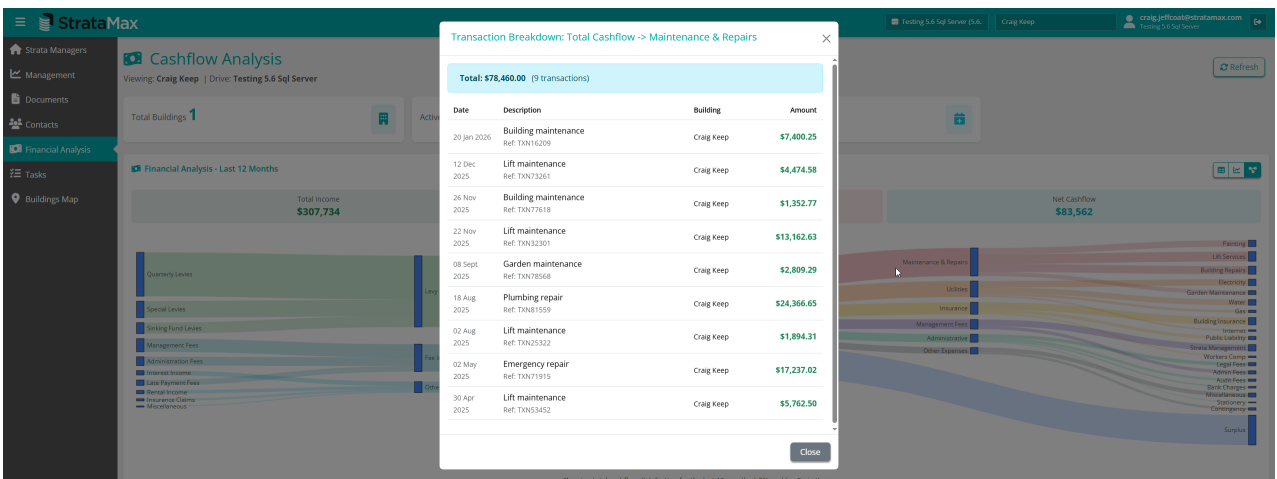
- Search, view and share documents from DocMax.

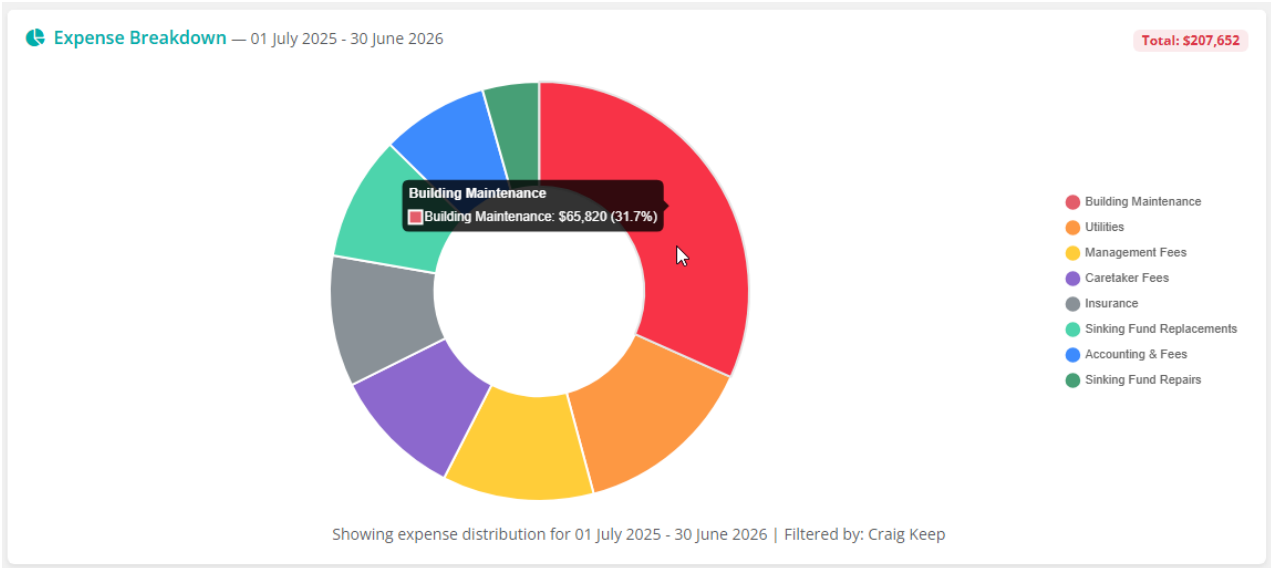


- Add Documents or photos utilising existing DocMax profiles so these appear directly in work queues if required.



- Interactive financial analysis including various financial graphs to assist during Committee/budget meetings etc.





- Portfolio/Account Manager dashboard

Management Dashboard

Account Manager Performance Metrics | Drive: Testing 5.6 Sql Server

Account Manager: All Account Managers 13 account managers

63 Buildings

2228 Lots

46% Avg AGM Compliance

0 Avg NPS Score

Account Manager	Buildings	Lots	Insured	Meetings	AGM Compliance	Mgmt Fee	Additional Income	Tasks	NPS	Expiring Contracts
Anne-Maree Summerfield	22	676	54%	40	95%	\$1,000,000	\$0	0	8	2
Craig Jeffcoat	4	108	90%	12	100%	\$1,000,000	\$0	0	8	1

Meetings Breakdown

Annual General	10	AGMs Within Timeframe	10 / 10	Promoters	0
General	1	VIC	5/5	Passives	0
Committee	1	SA	4/4	Detractors	0
		NSW	1/1		

Uninsured Buildings

23 STREET KEEP 354563 - Invoice Towers - Keep

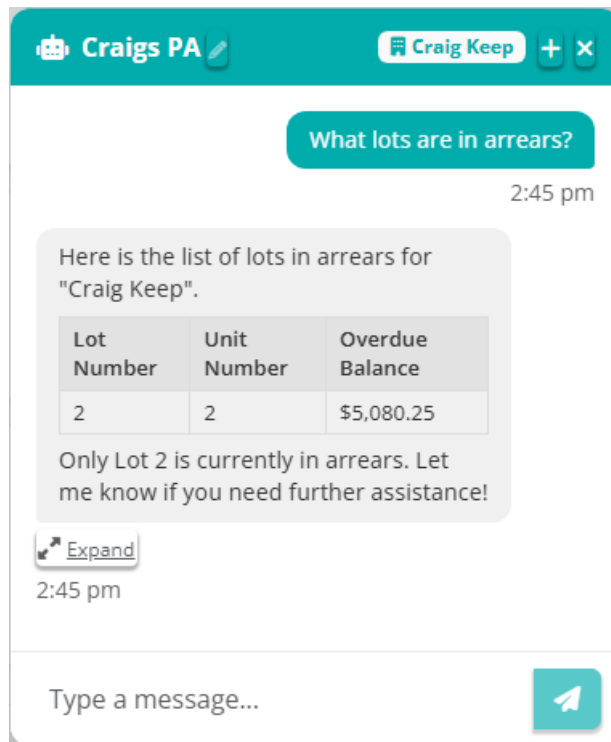
Expiring Contracts (Next 30 Days)

230 :02 Mar 2026

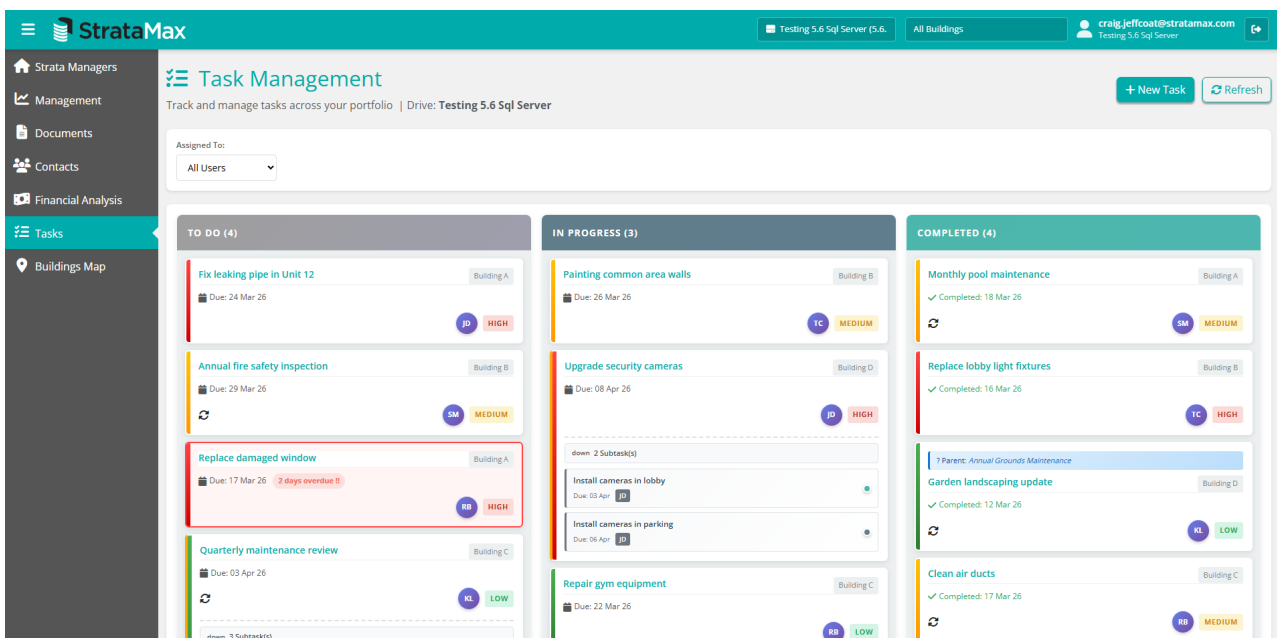
Account Manager	Buildings	Lots	Insured	Meetings	AGM Compliance	Mgmt Fee	Additional Income	Tasks	NPS	Expiring Contracts
Funny Face	1	37	9%	1	100%	\$1,000,000	\$0	0	8	0
Jessica Carroll	3	155	33%	0	0%	\$1,000,000	\$0	0	8	0

Additional functionality planned includes:

- An AI Assistant allowing you to query a wide range of data from within StrataMax



- Reporting & Analytics
- Building Inspections - create and review Inspection Register records using two way integration
- Task Management - Create, update and close tasks with two way integration with the Task Management



Security Administrators will have the ability to provide permissions to use the Strata Managers Portal; if provided access to the Strata Managers Portal will be based off your StrataMax login credentials.

Further features will be added to the Strata Managers Portal over time based on user feedback.

