

StrataMax Portal | Manager's Portal

Last Modified on 13/10/2026 5:00 pm AEST

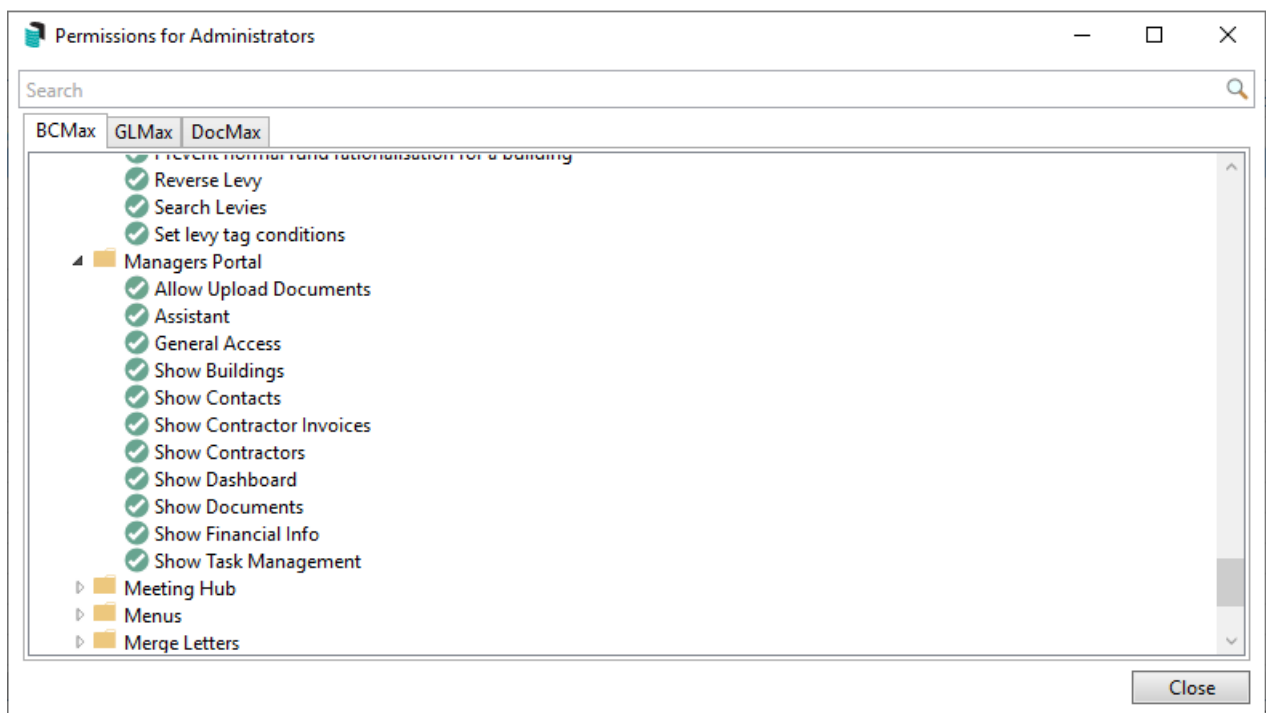
The setup and access instructions for the **StrataMax Managers Portal** are provided below. The portal offers a modern, user-friendly platform for accessing and reviewing key StrataMax data, with clear information and intuitive navigation.

This first release provides a comprehensive strata management solution. Tasks, Reporting and Analytics and Building Inspections are coming soon.

Security Setup

Security Setup lets you configure access to various areas on the **StrataMax Managers Portal** using the options below.

On update, Administrators will have the *Allow* permission set for all areas. For other staff, including groups, review and set the permissions as required.



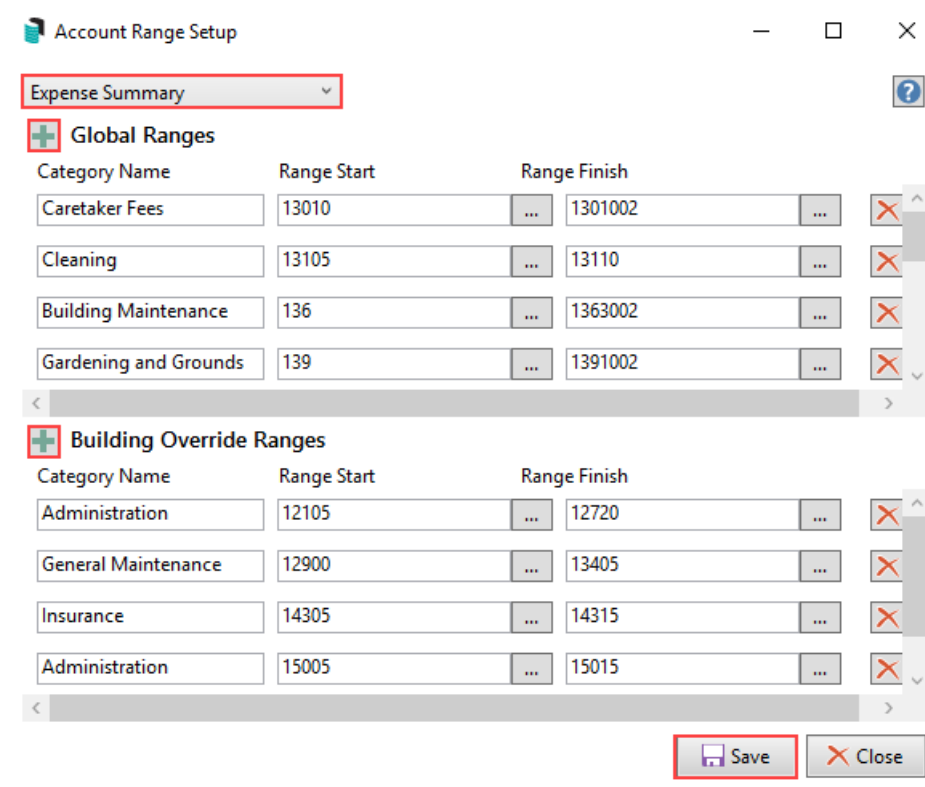
Set up the Expense Summary

The Manager's Portal includes a Financial Analysis area that reports on the account codes configured in

the *Expense Summary* area in StrataMax. Account codes can be grouped into meaningful categories and displayed in various graphs for current and previous years. Reports can also be exported to Excel.

If specific account code ranges are not required, use the expense start and finish ranges for a basic setup.

1. Search or select **Financial Statements**.
2. Options / Edit Account Summary List / select *Expense Summary* from the drop-down list.
3. Click  in the *Global Ranges* area to set a category, range start and finish on the account codes.
The same option exists for the *Building Override Ranges*.
4. Click *Save* to finalise the setup.



Category Name	Range Start	Range Finish
Caretaker Fees	13010	1301002
Cleaning	13105	13110
Building Maintenance	136	1363002
Gardening and Grounds	139	1391002

Category Name	Range Start	Range Finish
Administration	12105	12720
General Maintenance	12900	13405
Insurance	14305	14315
Administration	15005	15015

Set up the Cashflow Summary

The Cashflow Summary reports cash flow for the previous 12 months, with options for monthly or quarterly reporting. Custom categories and account code ranges can also be configured. These instructions relate to creating a manual setup, with instructions further below on importing a summary setup.

For accurate reporting, configure all bank accounts, including investment accounts, in **Bank Account Setup**.

For a basic setup, enter the applicable income start and finish ranges.

1. Search or select **Financial Statements**.
2. Options / Edit Account Summary List / select *Cashflow Summary* from the drop-down list.
3. Click  in the *Global Ranges* area to set a category, range start and finish on the account codes.

The same option is available for *Building Override Ranges*.

4. Click *Save* to finalise the setup.

Account Range Setup

Cashflow Summary

Global Ranges

Category Name	Range Start	Range Finish
Administrative Income	101	101102
Insurance Income	103	103102
Sinking Fund Income	201	20302
Sinking Investment Income	2070	2070

Building Override Ranges

Category Name	Range Start	Range Finish
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Save Close

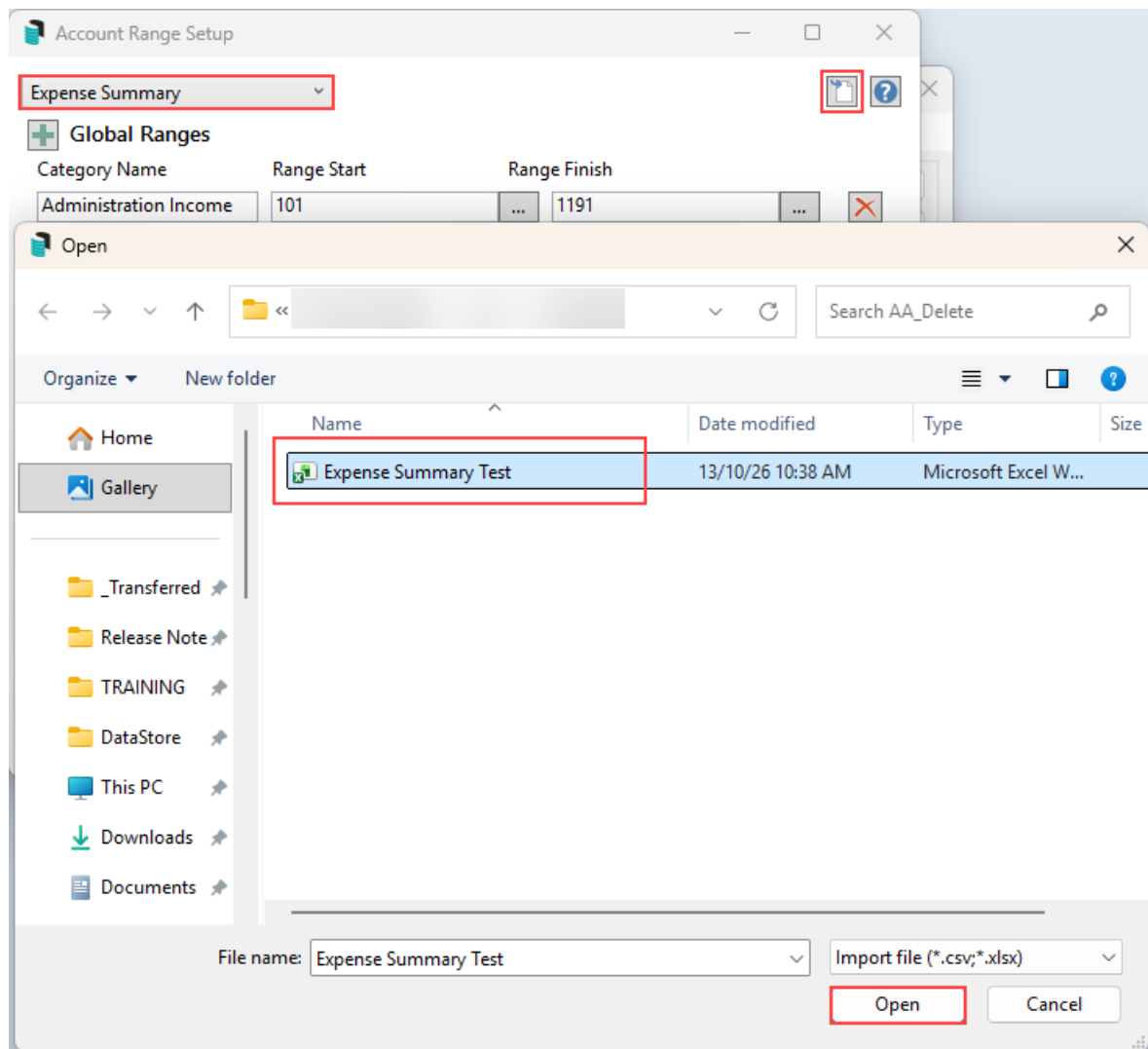
Summary Import

All summaries, which are Financial Account, Cashflow and Expense, are available to import with an Excel file. This file must contain the headers: Building Number, RangeCategory, CategoryName, RangeStart and RangeFinish. To import to the Global Ranges area, the Building Number is 0000.

This is an example of a Cashflow Summary Setup in the Excel worksheet.

	A	B	C	D	E
1	Building Number	RangeCategory	CategoryName	RangeStart	RangeFinish
2	0000	Cashflow Summary	Administration Income	101	1191
3	0000	Cashflow Summary	Administration Expense	120	130
4	0000	Cashflow Summary	Sinking Income	201	2191
5	0000	Cashflow Summary	Sinking Expense	220	26005

1. Search or select **Financial Statements**.
2. Options / Edit Account Summary List / select the *Summary* type from the drop-down list.
3. Select the Import Categories icon and navigate to where the Excel worksheet is saved, and click *Open*.
4. If there is an existing summary setup, there will be a warning to confirm that the import will replace the existing ranges for each building category combination. Select *Yes* to continue.



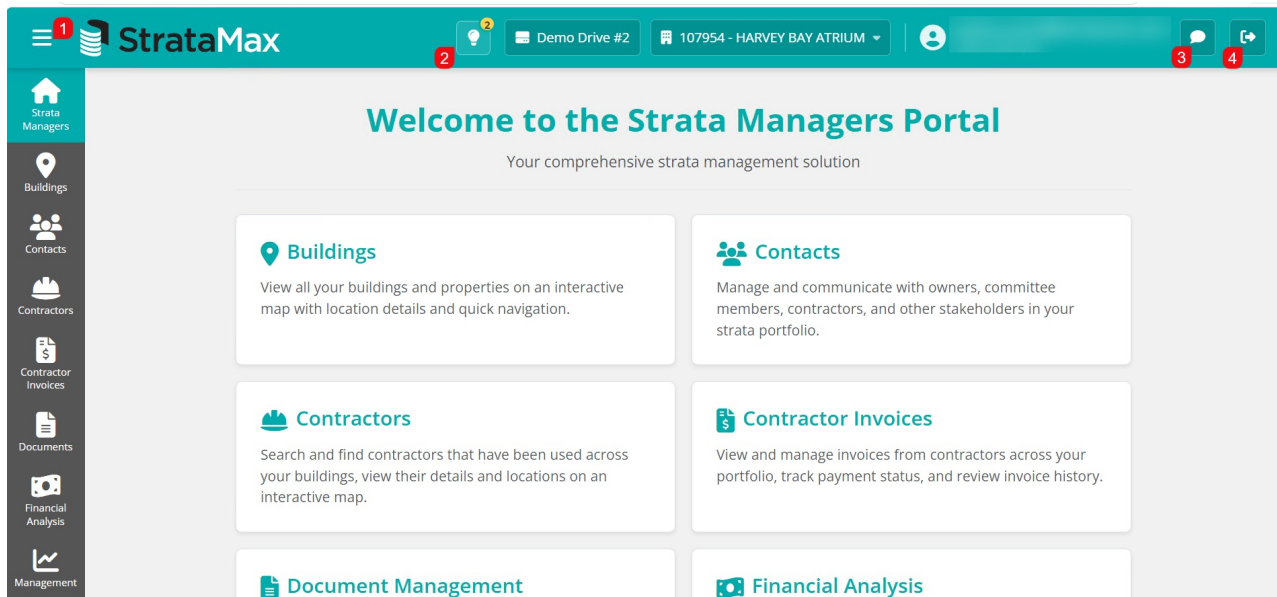
Accessing the Manager's Portal

You can access the Manager's Portal by logging in with your current StrataMax Username and Password. If 'Remember Me' is selected, your password will be remembered for 30 days.

When first accessing the Portal, you will have the option to 'take a tour'. When selected, the tour displays helpful on-screen prompts that guide clients through a high-level overview of the Portal. This can also be skipped.

Navigation

1. Toggle Navigation
2. Tips & Updates
3. Give Feedback
4. Logout Button

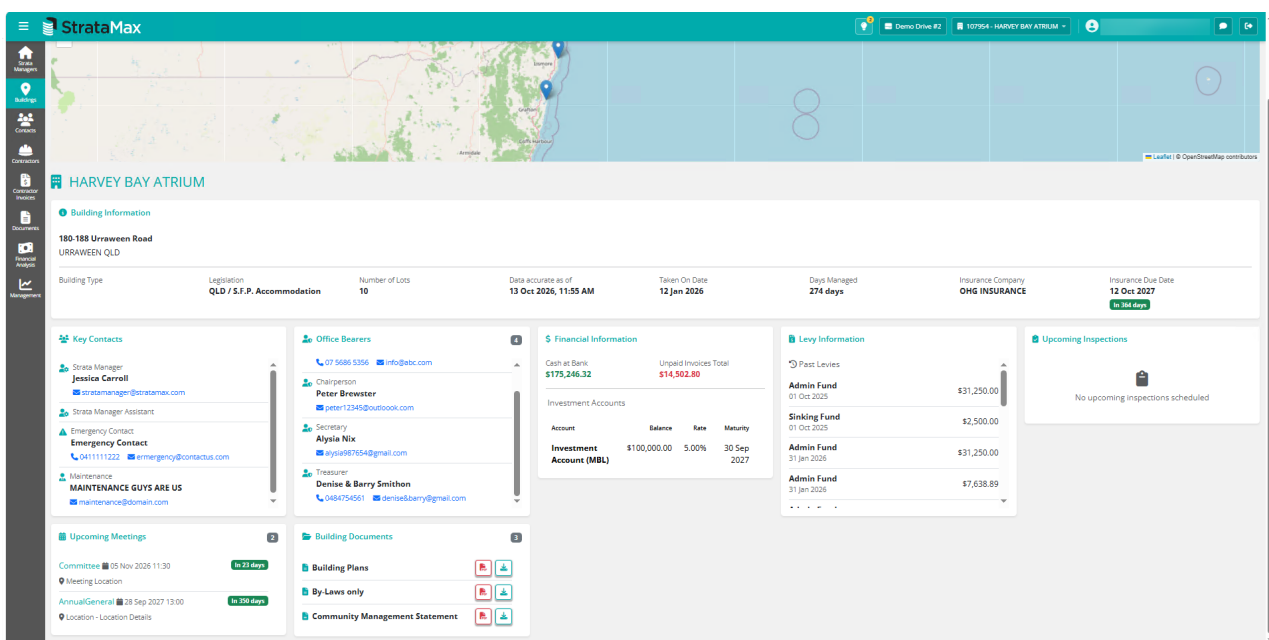


Buildings

The buildings page provides an overview of key building information, along with an interactive map allowing clients to select a building by clicking on a map marker. The map marker will display the address for the building selected based on the **Building Information** address when populated from the address look-up functionality.

Key Features:

- Building Information
- Office Bearers
- Levy Information
- Key Contacts
- Financial Information
- Upcoming Inspections
- Upcoming Meetings
- Building Documents



Contacts

You can search contacts by name, company, position, or lot number. This search is available per building or for all buildings.

The screenshot shows the StrataMax interface for the 'Contacts' page. The search bar contains 'Emergency'. A dropdown menu for 'All Buildings' is open, showing a list of buildings. The 'Position Types' section has 'Building Contact' selected. The results table shows one contact found: 'Emergency Contact' with phone '0411111222' and email 'emergency@contactus.com'.

Contractors

This area lets you look up contractors by Name, ABN, or Industry (set in **Creditor Maintenance** in StrataMax). You can view contact details, including a building reference showing which building the creditor has been used in, plus quick access to recent invoices you can download.

The screenshot shows the StrataMax interface for the 'Contractors' page. The search bar contains 'Plumb'. The 'All Industries' dropdown is open. The results table shows two contractors found: 'ABC Plumbing Pty Ltd' and 'PIPEWORKS PLUMBING'. The 'PIPEWORKS PLUMBING' row is highlighted. A sidebar on the right shows 'Recent Invoices' for 'PIPEWORKS PLUMBING' and a list of buildings.

Contractor Invoices

You can search for contractor invoices by Name, ABN, or Paid/Unpaid status here by building. Advanced filters let you refine your search further, if needed. You can download each invoice using the  icon.

StrataMax Demo Drive #2 107954 - HARVEY BAY ATRIUM

Contractor Invoices

Viewing: HARVEY BAY ATRIUM | Drive: Demo Drive #2

Q Sunshine Electrical Services x ABN Search by ABN... All Statuses Search

Advanced Filters

Date From dd/mm/yyyy Date To dd/mm/yyyy \$ Minimum Amount No minimum \$ Maximum Amount No maximum

Has Document All Is On Hub All

2 Invoice(s) found | Page total: \$968.50 | Search total: \$968.50 Page 1 of 1

Contractor	ABN	Date	Invoice Number	Building	Amount	Status	Doc
> Sunshine Electrical Services	39283660305	12 Oct 2026	INV-LS-68590	HARVEY BAY ATRIUM	\$781.00	Paid	
> Sunshine Electrical Services	39283660305	12 Oct 2026	INV-EL-48041	HARVEY BAY ATRIUM	\$187.50	Unpaid	

Document Management

You can search for documents in this area; it shows documents saved to DocMax that you can download or view. You can also upload documents and supported image files. Filters help you locate documents as needed.

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Document Management

Upload Documents

Q Search Documents

Title Minute Category All Categories Lot Search by lot...

File Type All File Types Added Date From dd/mm/yyyy Added Date To dd/mm/yyyy

Search Clear

Search Results 1 document(s)

Title	Category	File Type	Added Date	Building	Actions
2025 Minutes of AGM Meeting Minutes of AGM Meeting 2012.doc	Meeting Minutes	doc	27/04/2026	HARVEY BAY ATRIUM	

Upload Documents

You can select Profiles and Building when uploading a document or image file from the *Upload Documents* button, which is available on any device.

Upload Documents

Upload Profile (optional)

Internal Reports

Building (optional)

107954 - HARVEY BAY ATRIUM

Select Files

Choose FilesNSW_Plan.png

Document Titles

NSW_Plan.png (107.82 KB)

NSW_Plan

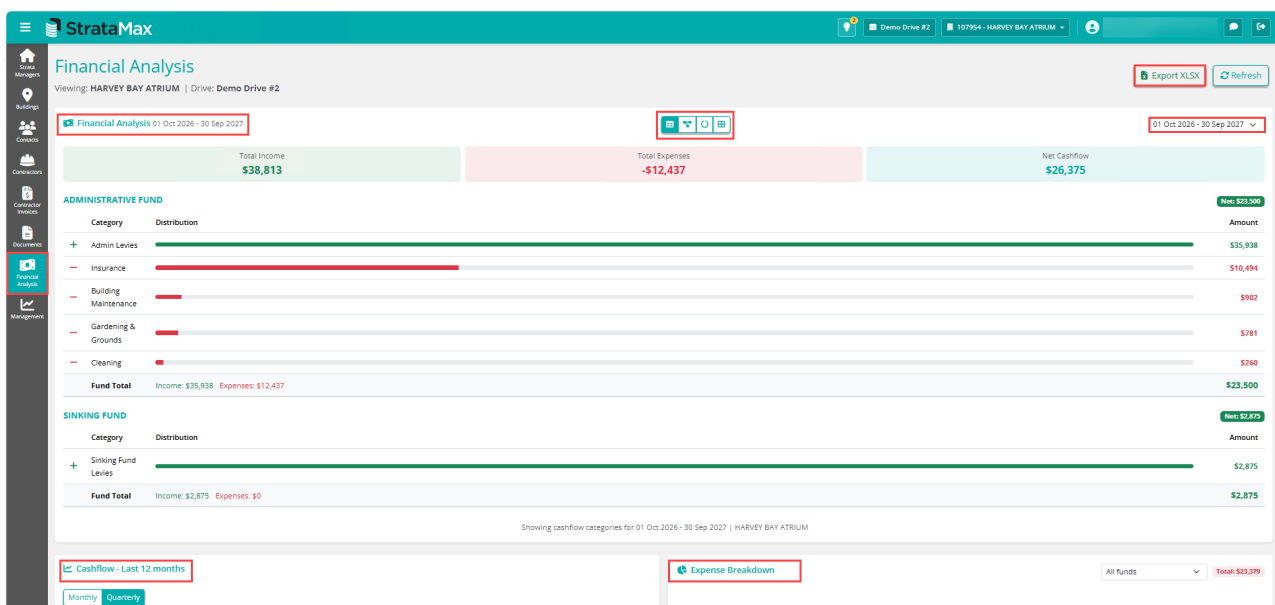
Take Photo

Cancel

Upload 1 file(s)

Financial Analysis

Once the Expense and Cashflow summary setups are finalised, including having all bank accounts set in **Bank Account Setup**, the financial analysis area will offer a variety of reporting styles focused on income and expense, with cashflow and expense breakdowns. You can export this information to Excel.



and Lots managed, with other key areas of managing data to report and Export to Excel.

Account Manager	Buildings	Lots	Insured	Meetings	AGM Compliance	Tasks (on time)	Expiring Contracts
> Bob Brown	5	75	0%	5	100%	10 12%	4
> [Redacted]	6	153	16%	2	100%	14 15%	2
> [Redacted]	4	45	20%	5	100%	3 0%	1
> [Redacted]	3	25	0%	3	100%	3 0%	0
> [Redacted]	1	18	0%	1	100%	1 0%	1
> [Redacted]	1	10	0%	0	0%	0 0%	0
> [Redacted]	2	10	0%	0	0%	2 0%	0
Totals / Averages	22	336	5%	16	71%	33	8

AI Chat Bot

An AI Chat Bot is available, and it is token-activated. Please have the StrataMax Administrator contact our [Support Team](#) if you'd like to enable this option.

Frequently Asked Questions

Q. What should I look at if the cashflow area is not reporting the same balance as StrataMax?

A. The cashflow reporting is driven from all bank accounts that are set up in [Bank Account Setup](#), including Term Deposits. If you review this area and ensure the accounts are available, it will upload to the Portal with the overnight synchronisation and report correctly.

Q. Why is the summary area blank when looking at the Financial Analysis area?

A. Review the Expense and Cashflow Summary setups in StrataMax.

Q. Why does the Google Map not show the property address?

A. Check that the Building Information address has been entered using the Australian Lookup Address Tool and update as needed.

Q. Why do my contracts not appear on the Portal?

Q. I am getting an error viewing documents, however if I try on my mobile phone or can see this on an external device it works, why is that?

