Outlook Add-in

Last Modified on 19/11/2026 4:56 pm AEST

The Outlook add-in provides access to StrataMax functions and information directly from Outlook. It works independently of StrataMax being installed on the device, allowing the available functions to be accessed wherever Outlook is available.

This article provides instructions for setting up and accessing these functions. The first release provides users with access to uploading emails and attachments to ***DocMax***, finding contacts and building information, attaching documents, managing tasks and using the AI Assistant.

> The ***AI Assistant*** will initially be released as a preview feature and is subject to change.

Install the Outlook Add-In

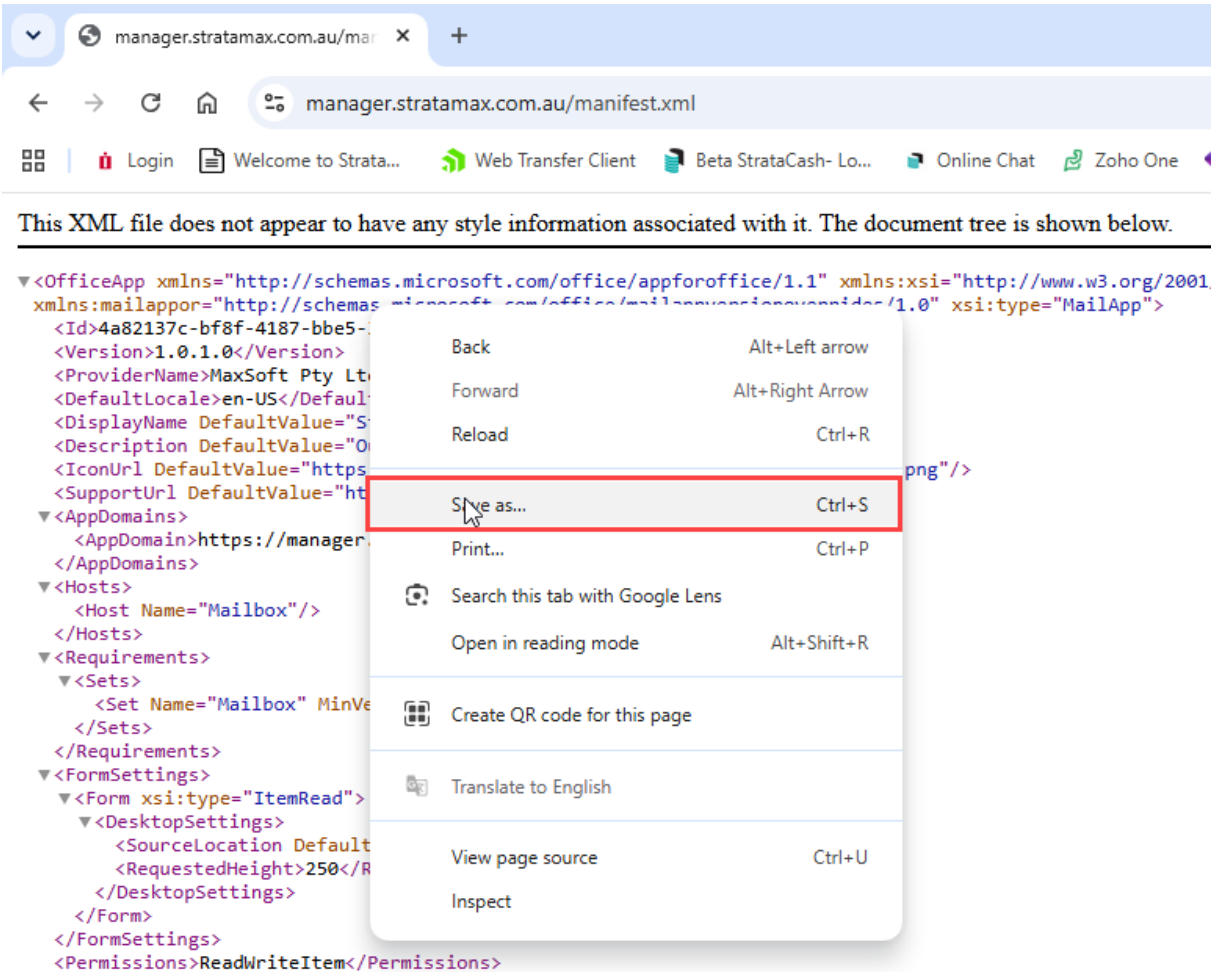
Your technical team can deploy the StrataMax Outlook Add-In to all users.

Refer to Deploy Office Add-ins in the Microsoft 365 admin center - Microsoft 365 admin | Microsoft Learn and use the StrataMax Outlook Add-In manifest: manager.stratamax.com.au/manifest.xml

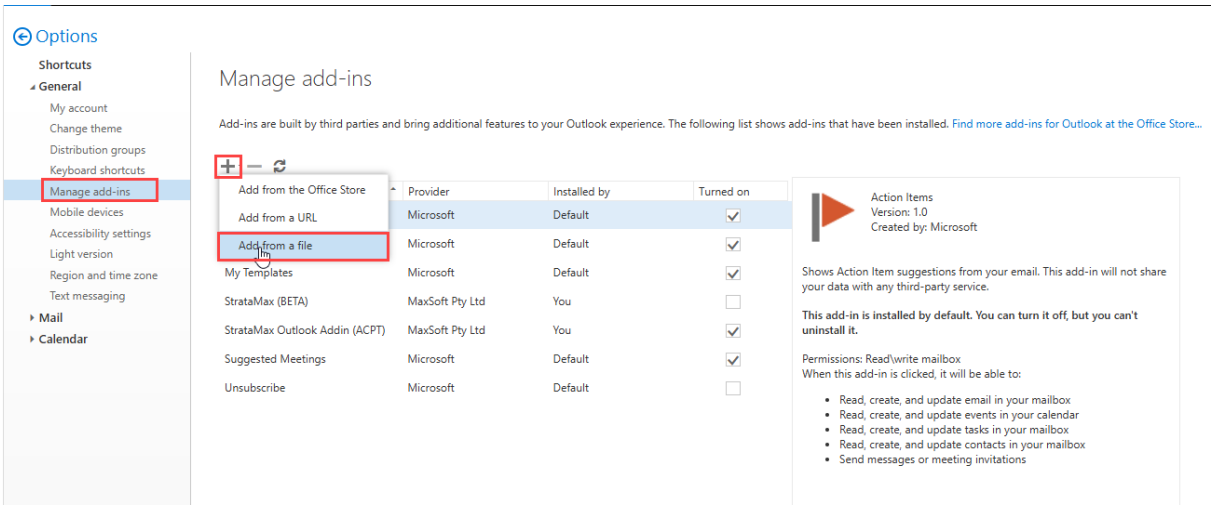
Manage Add-Ins

If Outlook cannot load the downloaded manifest file:

1. Open manager.stratamax.com.au/manifest.xml in a web browser.
2. Right-click when the XML file opens, and *Save As*.



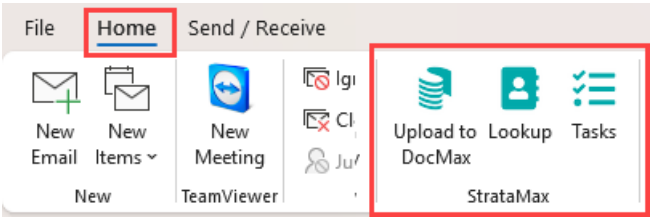
3. Save the file as *Manifest* in a known directory.
4. In Outlook, select *File* and then *Manage Add-ins*.
5. Sign in using your domain username and password.
6. Click the settings cogwheel in the top-right corner, then select *Manage add-ins*.
7. Click the + symbol and select the option to add an add-in from a file.



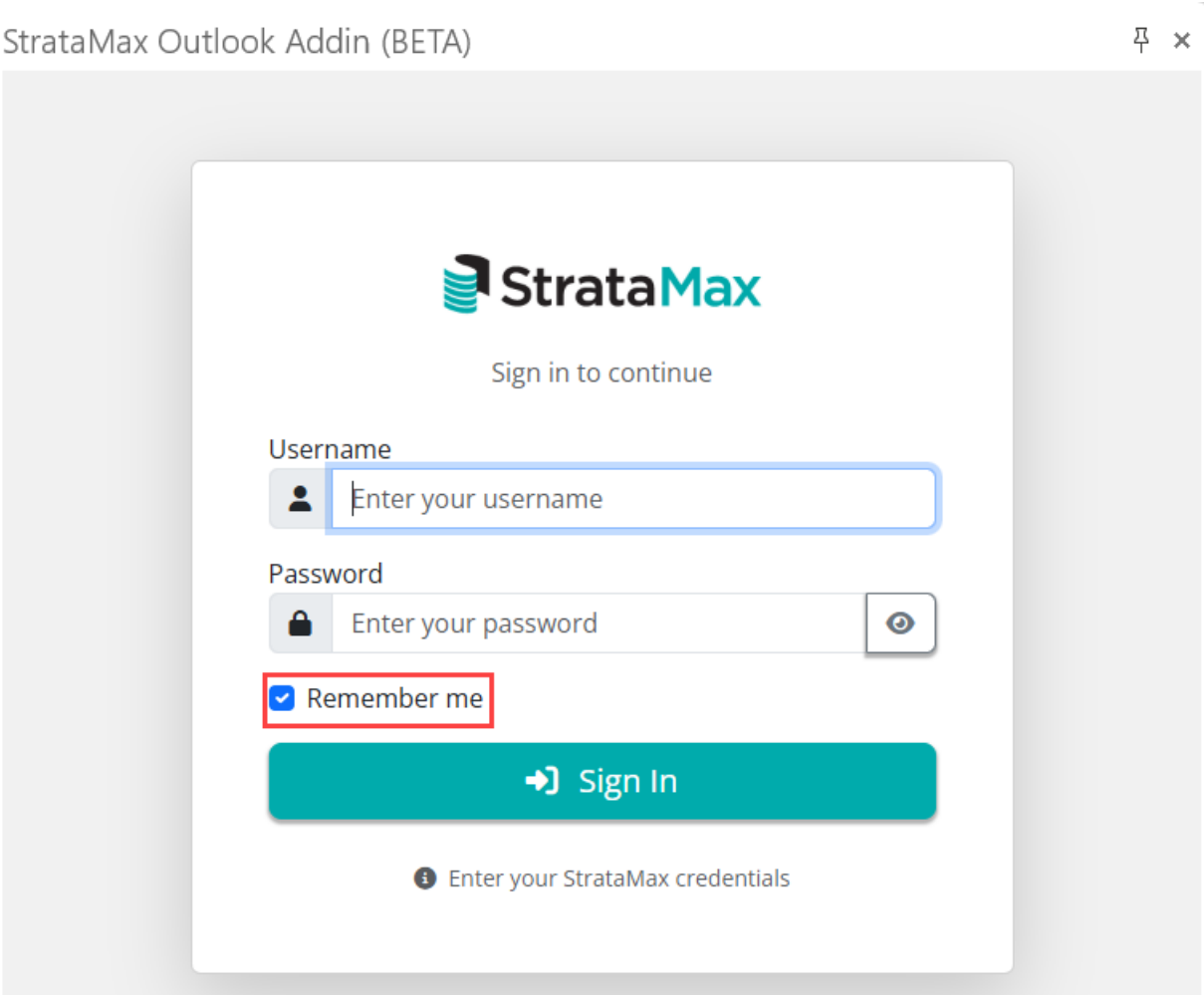
8. Select the saved manifest file, then click *Next* and *Install*.
9. Click *OK* when the installation is complete.

Access to Outlook Add-In

Once you install the Outlook Add-In, this application will appear on the*Home* tab in Outlook.



Logging into the Outlook Add-In will use the same credentials as your StrataMax application. There is a tick box to 'Remember me' which will allow you to remain logged in.



Upload to DocMax

Uploading to DocMax is available for both emails and attachments. Using a profile helps file the document in DocMax and can be useful for processes such as adding an invoice to a creditor invoice work queue. If no profile is selected, you can add the document with details at the time of upload or add it to DocMax for filing later.

Bulk document uploads can be managed using the classic version of the Outlook add-in. When this

functionality becomes available in the newest version, this article will be updated.

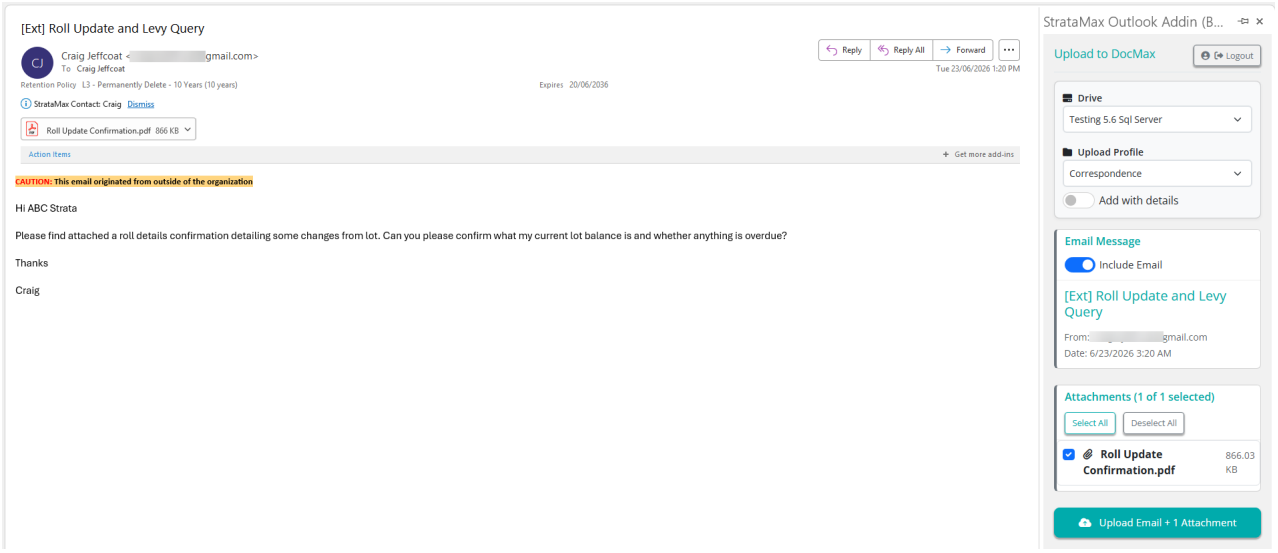
Upload using Profile

The five most recently used profiles appear at the top of the profile list for quick selection.

1. Locate the email and/or attachments.
2. Using the Outlook add-in, select *Upload to DocMax*.
3. Optionally, select the building from the *Building* drop-down list.
4. From the Email Message area:
    - If the email is not required, turn off the *Include Email* toggle.
    - If the email should be uploaded as a separate document with the selected attachments, turn on *Include Email*.
    - If the email and selected attachments should be uploaded as one file, turn on*Bundle Attachments* and *Include Email*.
5. From the Attachment area, select *Select All* to tag all attachments or individually tag the required attachments.
6. Select *Upload*.
7. This will add the email and/or attachments to DocMax.

Upload using No Profile

1. Locate the email and/or attachments.
2. Using the Outlook add-in, select *Upload to DocMax*.
3. Turn on *No Profile* and *Add with Details*.
4. Optionally, select the building from the *Building* drop-down list.
5. From the Email Message area:
    - If the email is not required, leave the *Include Email* toggle off.
    - If the email should be uploaded as a separate document with the selected attachments, turn on *Include Email*.
    - If the email and selected attachments should be uploaded as one file, turn on*Bundle Attachments* and *Include Email*.
6. From the Attachment area, select *Select All* to tag all attachments or individually tag the required attachments.
7. Select *Upload*.
8. From the *Add Document* window, add the document details and any other document properties. Click *Add Document* to add to DocMax. *Discard Document* closes the *Add Document* window without saving.



Lookup

Contacts

When composing an email, use ***Contacts*** to search for and select contacts from the StrataMax database. This removes the need to locate contact information in StrataMax and copy it into Outlook manually.

Search for an individual contact or use the quick recipients option to email a building's committee or owners. Select the building, then select ***Committee*** or ***Owners***.

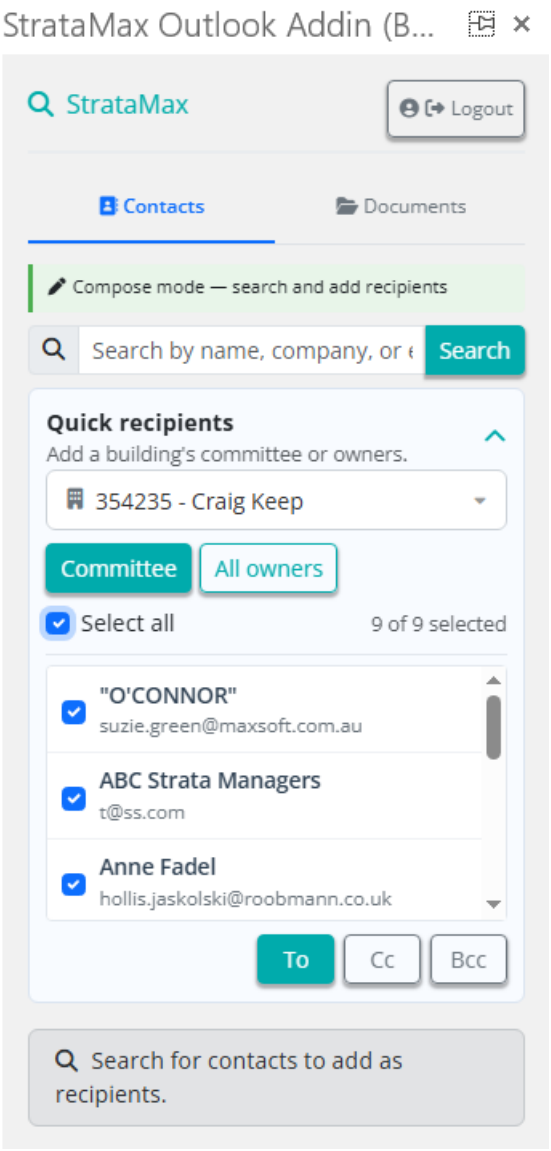
Add Recipients to an Email

1. Create a new email.
2. Use the *Contacts* area from the StrataMax add-in.
3. Search by name or company and enter the name of the contact. Click*Search* to locate the contact.
4. Once you locate the contact, click the *To, CC*, or *BCC* field to add them to that recipient field. If there are multiple contacts, use the *BCC* field.
5. Repeat for any other individual contacts.
6. Compose and send the email as required.

Add Quick Recipients to an email

1. Create a new email.
2. Use the *Contacts* area from the StrataMax add-in.
3. From the *Quick Recipients* area, add the building from the drop-down list to access the committee or owner contacts.
4. From the selected *All owners* or *Committee* contacts, either *Select All* to tag everyone or tag individual contacts.
5. Use the *BCC* field to add multiple contacts to the recipient field. You can also use the*To* and *CC* recipient fields.

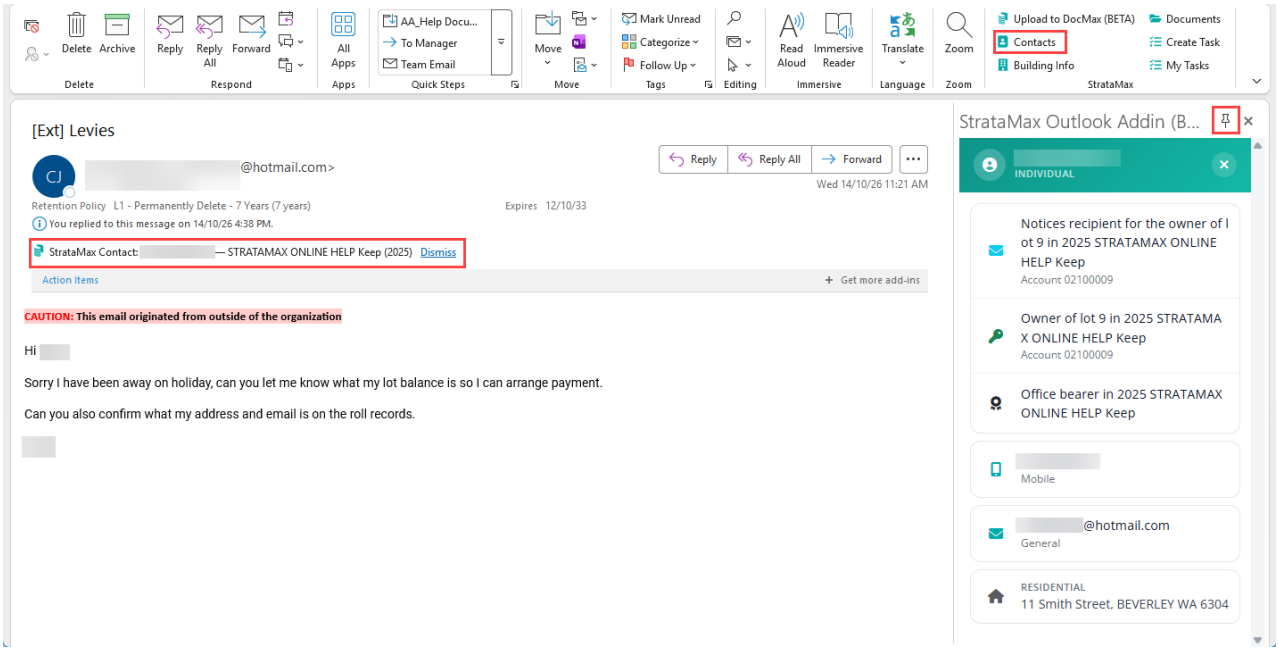
6. Compose and send the email as required.



Identify an Email Sender

When you receive an email without enough information to identify the sender's associated building, use *Contacts* to search StrataMax contacts using the sender's email address.

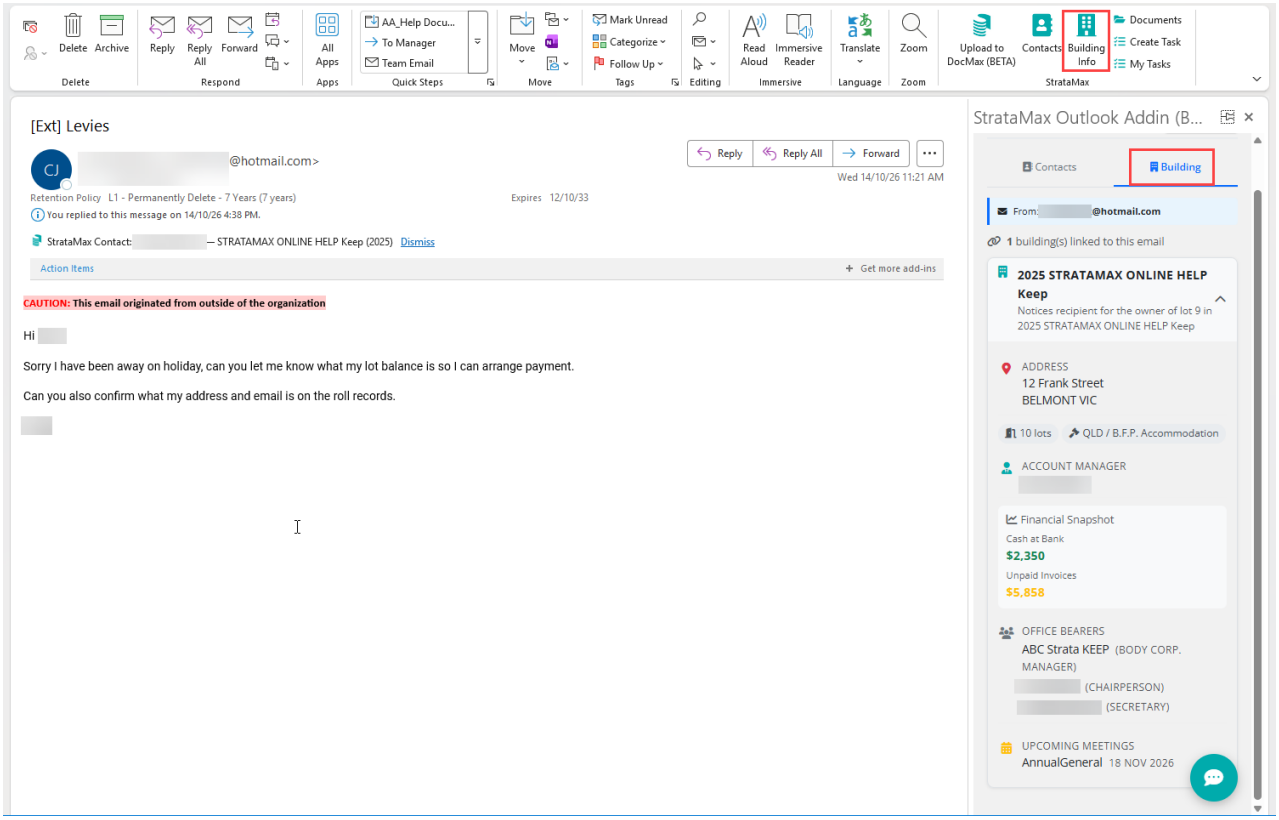
The results can include the contact's residential address, contact details and current positions. Pin the add-in to Outlook to automatically identify the contact as you move between emails.



Building

Use ***Building*** to access key building information from Outlook. Buildings are identified using the email address and associated positions.

Select an identified building to preview a summary containing its address, building type, account manager, financial summary, office bearers and upcoming meeting dates.

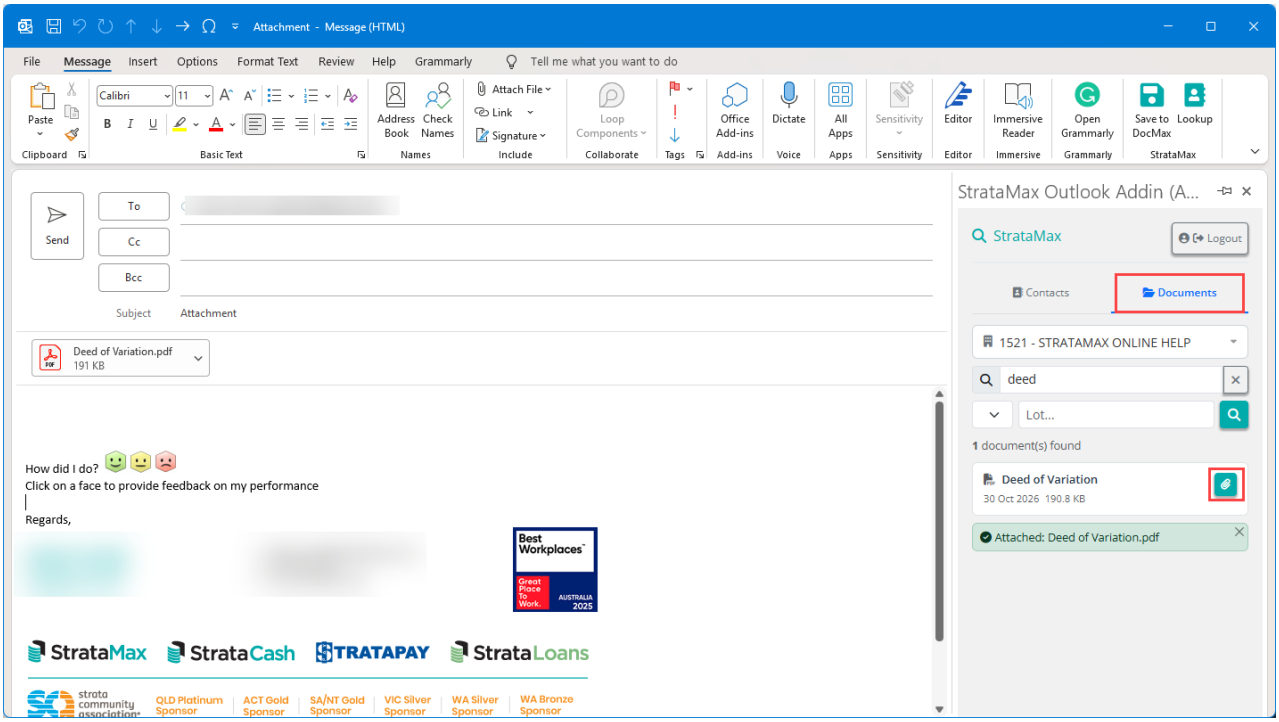


Documents

When composing an email, use *Documents* to locate and attach documents from ***DocMax***.

1. From the compose email screen.
2. Use the *Lookup* area and select the *Documents* tab.
3. Select the *Building* from the drop-down list.
4. Enter text into the *Search by Title* and or *Lot* field **OR**
5. Scroll through to locate the document.
6. Once located, click the  icon to add the document as an attachment to the email.
7. Complete the email content and click *Send* when finished.

Filter the available documents by title, category and lot, then attach the required documents to the email. You can also download documents directly from *Documents*.

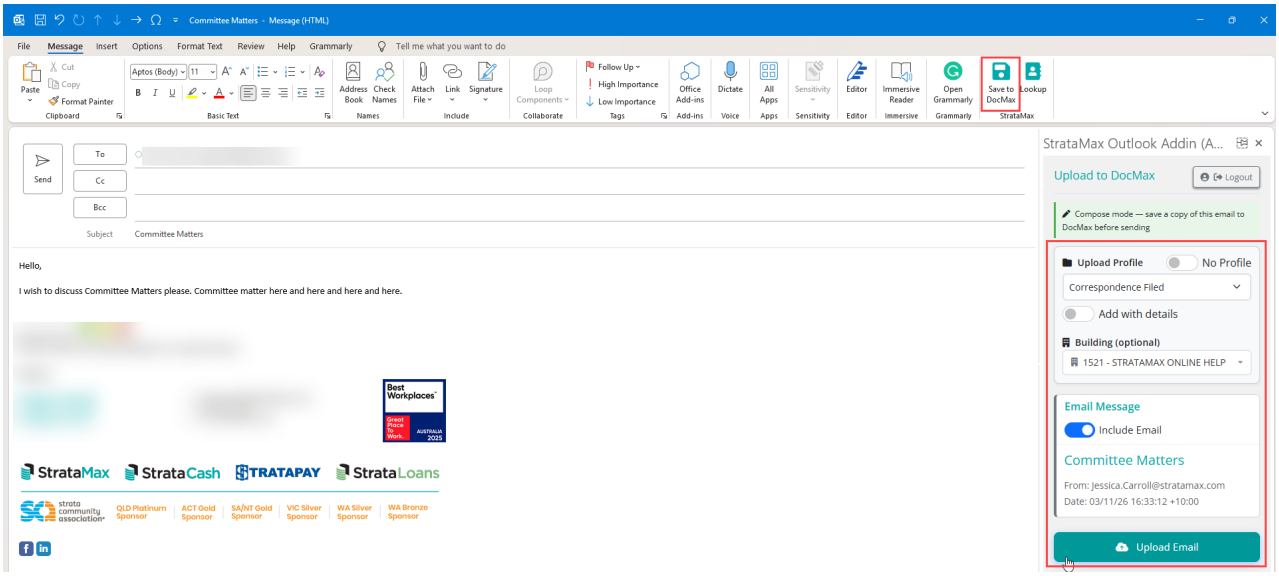


Save to DocMax

Use this method to add emails to ***DocMax***; once they are available in ***DocMax*** and opened, they open in Outlook and can be used with standard email functionality.

1. From the compose email screen.
2. Complete the email content.
3. Click *Save to DocMax*.
4. Assign a *Profile* or *Add with Details*. If you add with details, this opens the *Add Document* window. Add the file details for ***DocMax*** and save.
5. If available, select the *Building* from the drop-down list.

6. The Include Email toggle will be on. Click *Upload Email*.



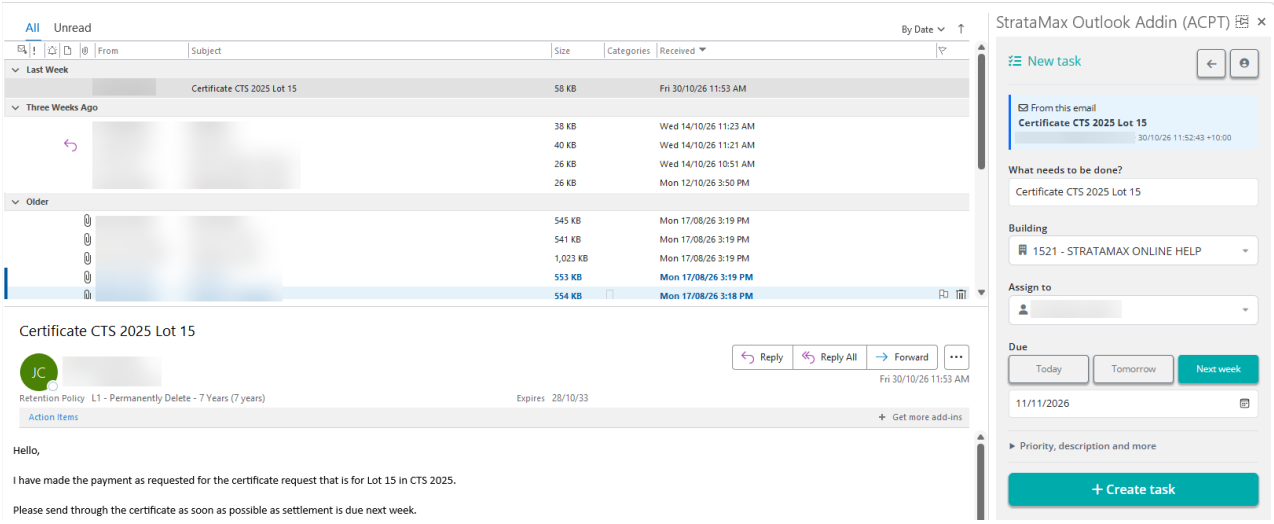
Tasks

Use Tasks to create and view tasks with ***Task Management*** and update the task's status directly from the add-in. Tasks can be assigned to specific users and include a priority, due date and detailed description.

Create a new Task

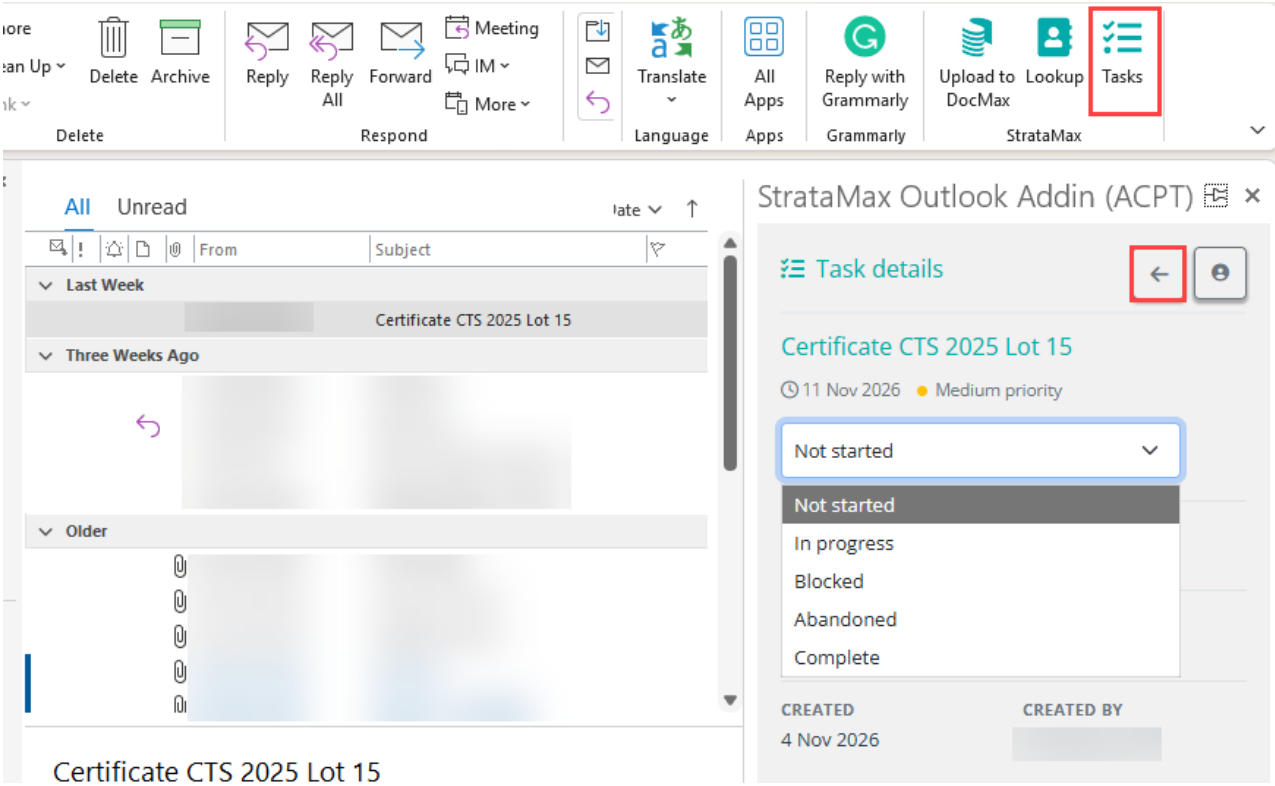
1. Locate the email in Outlook that requires a task.
2. Click  to create a new task. The task title will match the email subject line. This can be amended as needed.
3. Select a *Building* from the drop-down list.
4. Select the assignee from the *Assign To* drop-down list.
5. Assign the due date using either a pre-set period or the calendar and whether there is a priority to assign with the task.
6. If you need to include additional information or instructions with the task, add them to the description area.
7. Click *Create Task*.

This creates the Task in ***Task Management*** and makes it available in the *Upcoming* and *All* tabs in the Task area.



Update Existing Task

1. Using *Tasks,* review open tasks by either searching or selecting them from the period tabs.
2. Either mark them as complete or expand the item to change the task status.
3. Click the back arrow to return to all outstanding *My Tasks*.



AI Assistant

This will initially be released as a preview feature and is subject to change.

Use the AI Assistant directly from the Outlook add-in to query a wide range of data available in StrataMax to assist with emails and, if required, compose new emails or draft replies for you.

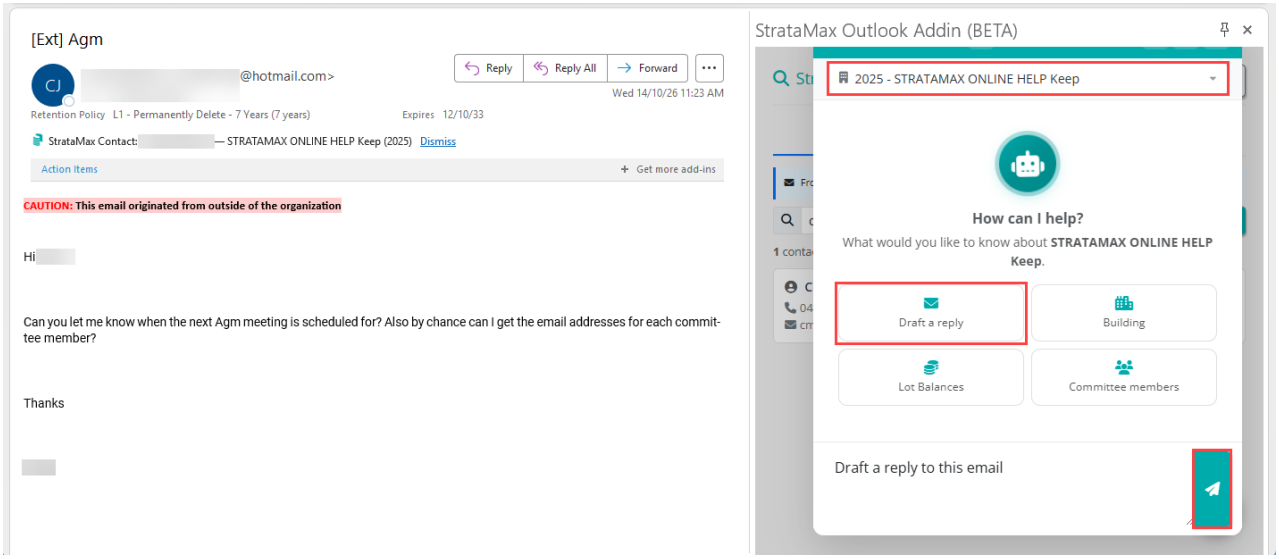
AI Assistant Navigation

1. Your AI Assistant's name. You can rename it to your preference.
2. The current building selected.
3. Expand the AI Assistant to view more information.
4. Start a new chat. This is recommended for each new chat, as it will keep the content focused on the current question.
5. Close the AI Assistant.



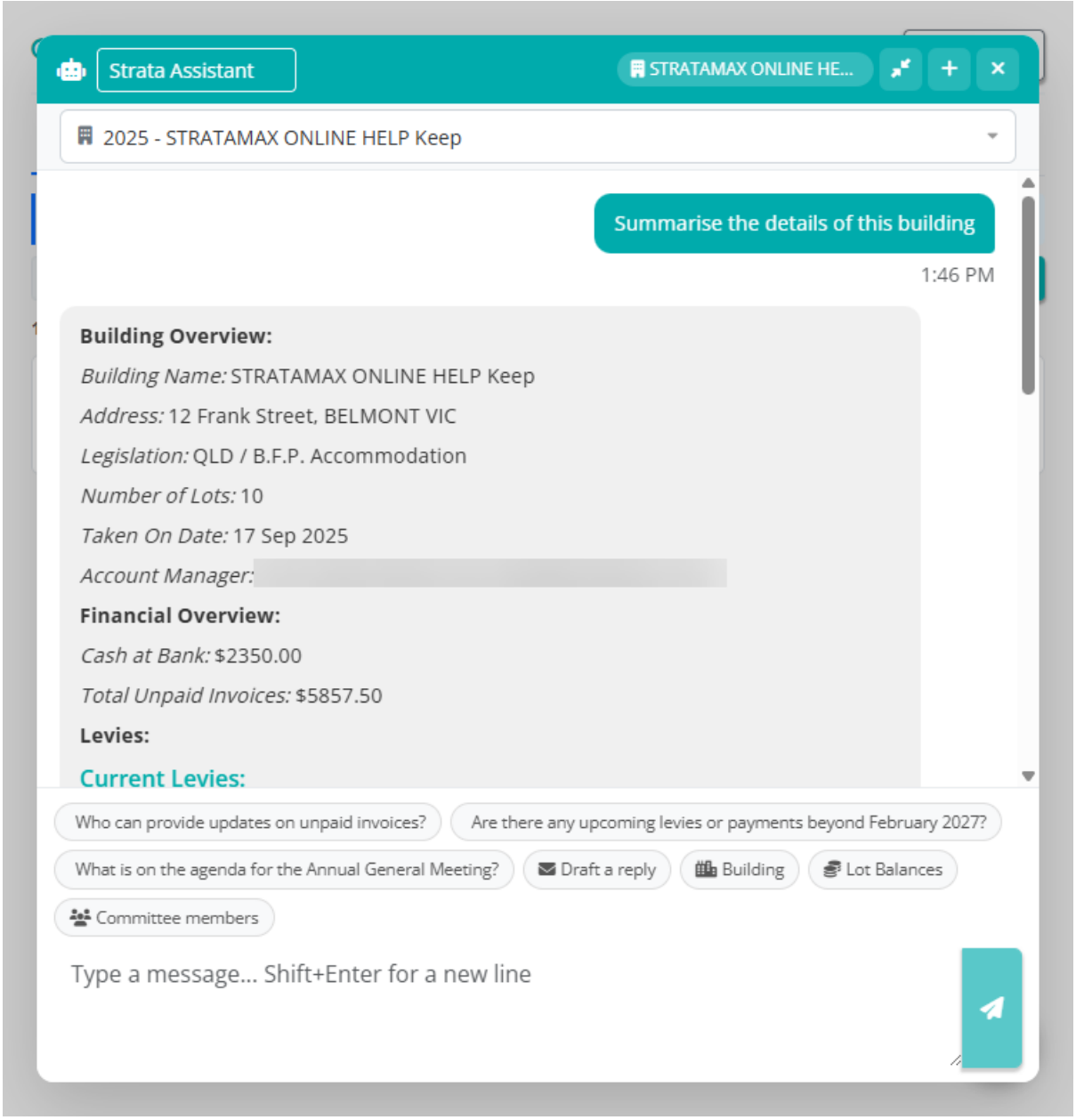
Drafting replies to emails

1. Locate the email required for drafting a reply.
2. Use the AI icon  in the bottom right of the screen to launch the AI assistant.
3. Select the building from the drop-down list.
4. From the pre-populated questions, click *Draft a reply*, and submit the query.
5. The AI assistant will draft a reply to the open email.
6. Review the content and send the email.

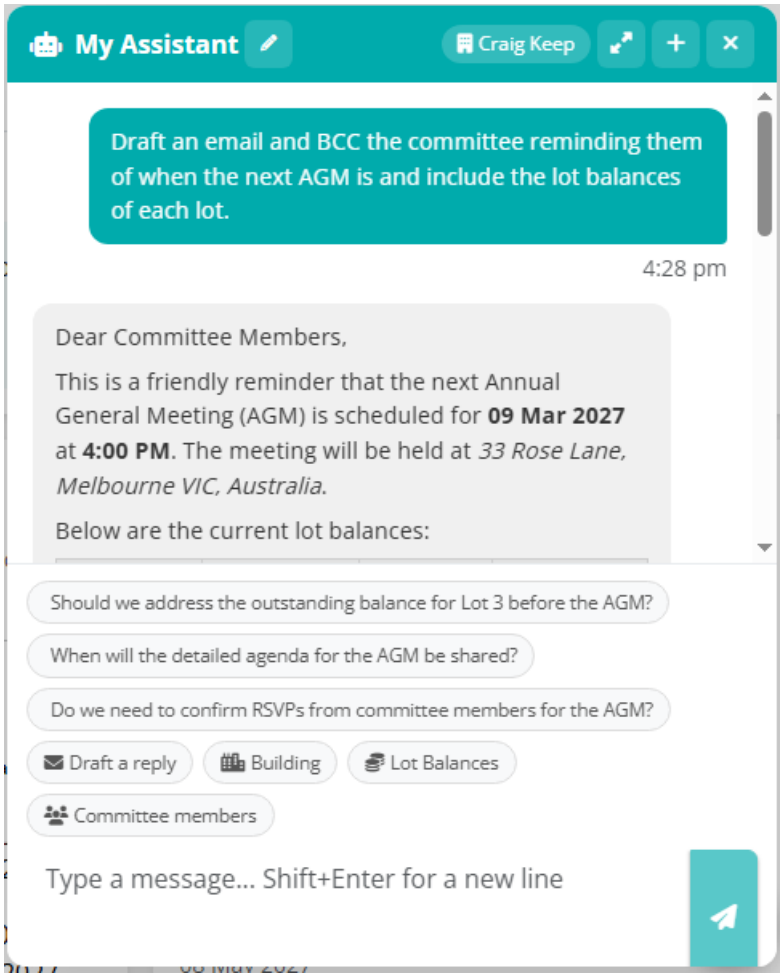


Asking StrataMax data-related questions

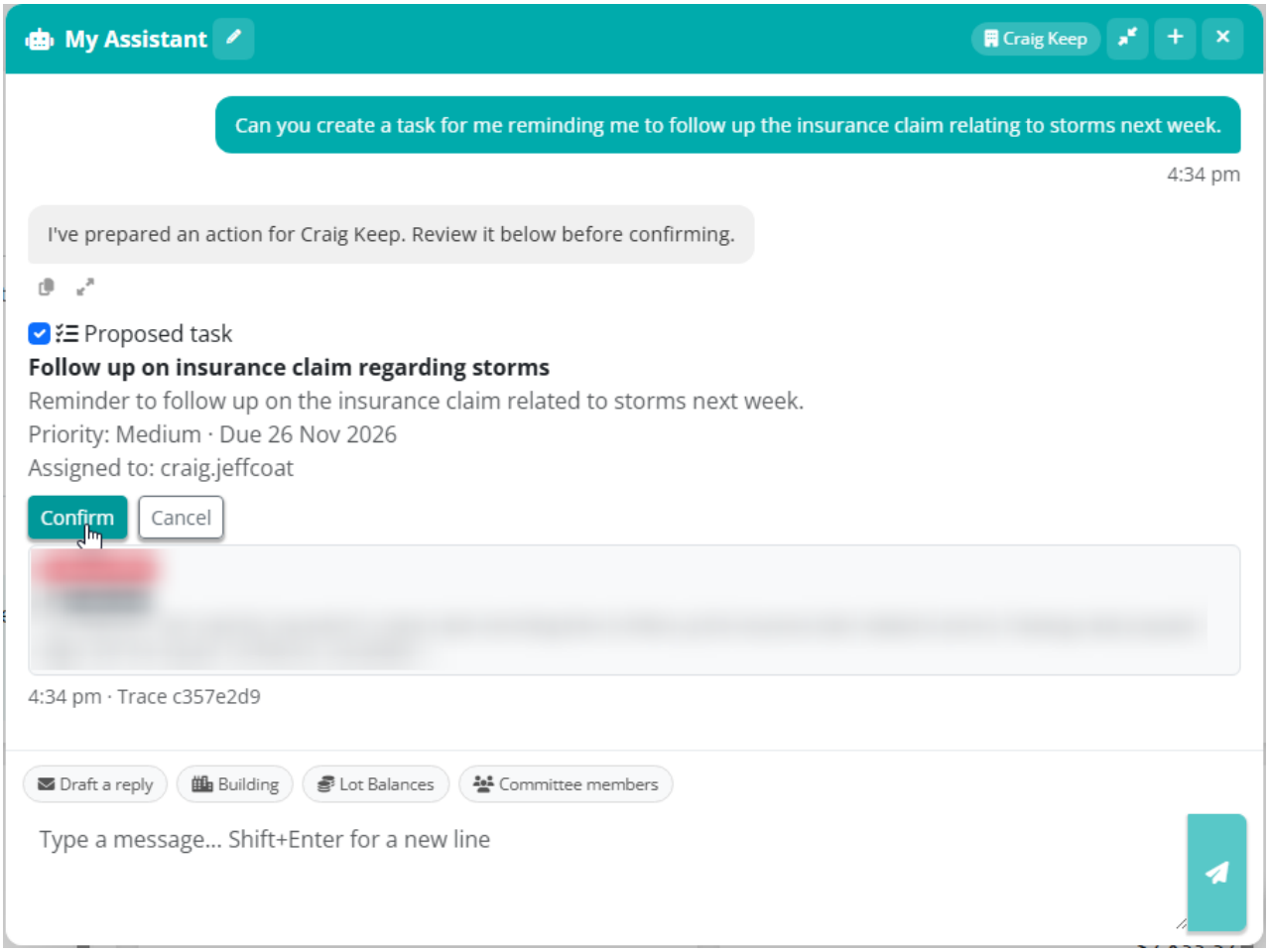
You can ask your AI Assistant basic StrataMax data-related questions. Remember to click the + for each new chat to ensure the most accurate results. You can select from pre-populated questions, or ask your own question.



Asking to Draft an Email



Get the Assistant to Help Create a Task


My Assistant
Craig Keep
Can you create a task for me reminding me to follow up the insurance claim relating to storms next week.
4:34 pm
I've prepared an action for Craig Keep. Review it below before confirming.
Proposed task
Follow up on insurance claim regarding storms
Reminder to follow up on the insurance claim related to storms next week.
Priority: Medium · Due 26 Nov 2026
Assigned to: craig.jeffcoat
Confirm
Cancel
4:34 pm · Trace c357e2d9
Draft a reply
Building
Lot Balances
Committee members
Type a message... Shift+Enter for a new line