

TRAINING REFERENCES



Owner & Executive Portals

- ✓ Offer branded portals to you Owners & Executives
 - ✓ Secure access
 - ✓ Available 24/7 online, anywhere, anytime
 - ✓ Your Owners & Executives can view a variety of information about their property
 - ✓ Customise what information your Owners & Executives see
 - ✓ Improve time management for both you and your clients
 - ✓ Included in your STRATA Master subscription
- See the Rockend [Knowledgebase](#) for more information on Portals



Activate Portals

- Activate Portals with STRATA Communicator
- STRATA Communicator allows you to configure and customise access to your Owner and Executive Portals.
- For instructions on how to install STRATA Communicator see the [Knowledgebase](#)
- Go to **Configure > Communicator Configuration > Portal** and select the **Active** checkbox and **Save Changes**



Add your Branding to Portals

Customise the Portals with your company branding.

- Add Headers & Footers banners
- Link to your website
- Customise colours

To add your branding:

1. Go to **Configure > Communicator Configuration > Branding**
2. Browse to select banners & Mobile Home Screen icon
3. Choose your colour scheme
4. Save changes

See the [Knowledgebase](#) for more information on Customising your Portals



Customisation of Portals

Use the Customisation tab to:

- Set a Portal Contact Email address
- Select what information Owners & Executives see, including: Meetings, Photos, Maintenance Details, Manager details
- Use the Documents tab to allow documents from fileSMART to display on portals
- Use the Web Access Wizard to further customise portals.
- Go to **Configure > Web Access Wizard > Configure Portals**

See the STRATA Master Help File for more information: Release Notes for STRATA Master > Version 5.5.1 > Owner & Executive Portal Configuration



Issue Usernames & Passwords

Generate and Issue Usernames & Passwords for your clients to access the Portals.

1. Go to **Configure > Web Access Wizard.> Issue Usernames and Passwords**
2. Select to issue for all or individual plans or contacts
3. Complete Wizard and Issue usernames & passwords

Click [here](#) to see how to create a customised brochure to let your clients know about the benefits of using Portals. Download the [brochure template](#) from the Rockend website.



Remember!

Check for correct notification templates & duplicate contacts before issuing usernames & passwords