



Instructional Manual

StrataMax Online Portal Advanced Setup

THE COMPLETE STRATA MANAGEMENT SOLUTION



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Introduction

The StrataMax Online Portal is a valuable tool for Strata Management companies. A key benefit is that it allows you to provide Lot Owners of schemes under management with access to a range of documentation, including: auto-generated BCMax reports; Sales Certificates and Disclosures Statements for owners who are selling their properties; and additional reports and documents you may wish to provide.

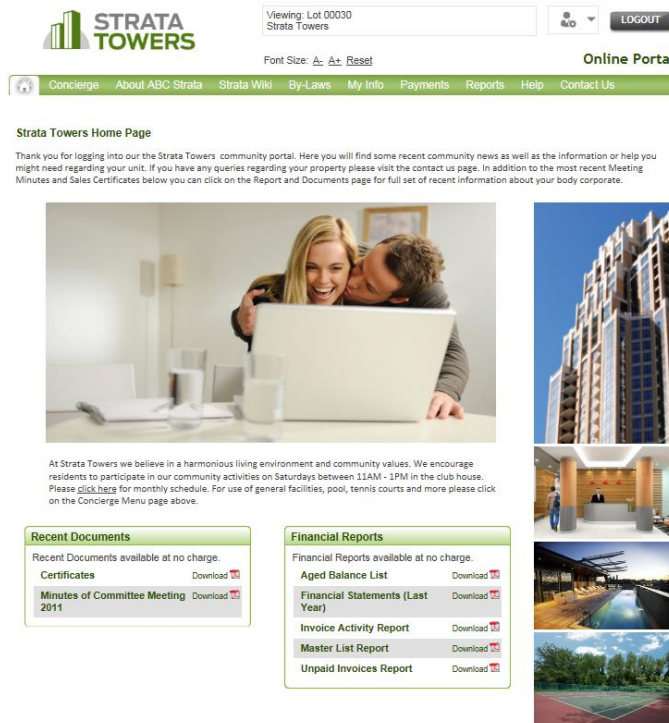
A further benefit is that you can elect which documentation Owners/Committee Members have access to, and, if applicable, set appropriate charges for access to each document.

The Online Portal also enables Lot Owners to update their details online. Changes made are automatically submitted back to your system for automatic processing, see [page 76](#).

In addition, owners with multiple properties can access all properties via their User Account and view reports &/or pay their levies.

The Online Portal may also be customised with your logo and company colour scheme by creating a 'Theme', you may have a theme which can be applied to all buildings under your Management, or alternatively on a per Building Basis.

When creating your Portal, try to think about the layout, content, and how you want the owners and committee to view the pages - it's easier to plan first and then design a specific functional look, rather than make it up as you go.



Site Customisation (Appearance)

As mentioned previously, you are able to customise the Online Portal by creating a 'Theme' which can be applied for all your buildings under your Management, or alternatively on a per Building basis.

1. Open your internet browser
2. Go to www.stratamax.com.au/portal/login.aspx
3. Enter your User Account email address and Password
4. In the 'Site Customisation' Menu, as shown below, click on 'click here' to access the Site Customisation Section

The screenshot shows the StrataMax Online Portal interface. At the top left is the StrataMax logo. To its right, it says "Viewing: MAXSOFT PTY LTD" with a "CHANGE" button. Further right is a user profile icon with a dropdown arrow and a "LOGOUT" button. Below this is a font size selector: "Font Size: A- A+ Reset". On the far right of the top bar is the text "Online Portal".

A navigation menu below the top bar contains: Home, Owner View Access, Reports & Documents, Site Admin, Customise, and Help.

The main content area is titled "Welcome to StrataMax" and contains a paragraph: "This Portal is designed to give you the flexibility to manage online access to a number of useful documents, reports and other details for your Owners and Committee Members."

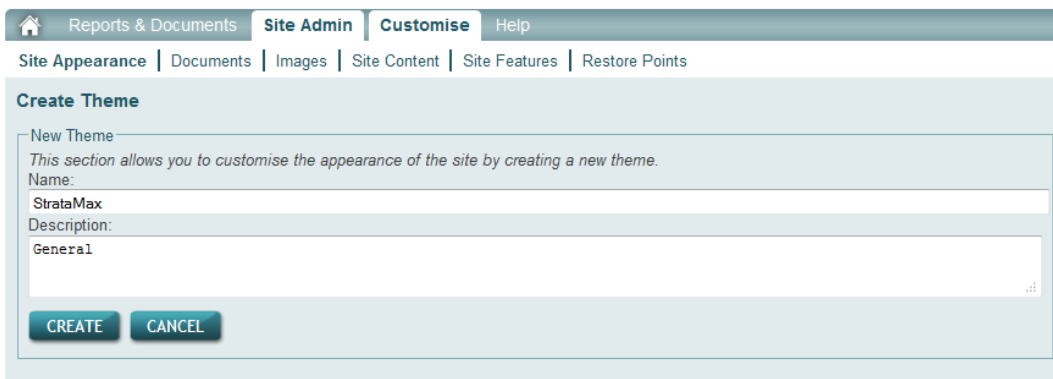
There are four informational boxes:

- Owner View Access:** Explains that this feature allows users to view the portal as one of their Lot Owners, with enhanced areas for bypassing report or document payments. It includes a "click here" link to access the feature.
- Site Customisation:** Explains that this allows users to create 'Themes' to change the header logo and colors to match their branding. Themes can be applied globally or per building. It includes a "click here" link to access the section.
- Reports & Documents:** Explains that the portal provides a convenient way for owners and committee members to download reports, documents, and certificates. It includes "click here" links to access the "Management of Reports & Documents" and "View Reports & Documents" sections.
- Site Usage:** Explains that the Site Usage page shows StrataMax usage statistics for Requests for Reports and Documents, Payments, and Logins to the Online Portal. It includes a "click here" link to access the section.

Create a New Theme

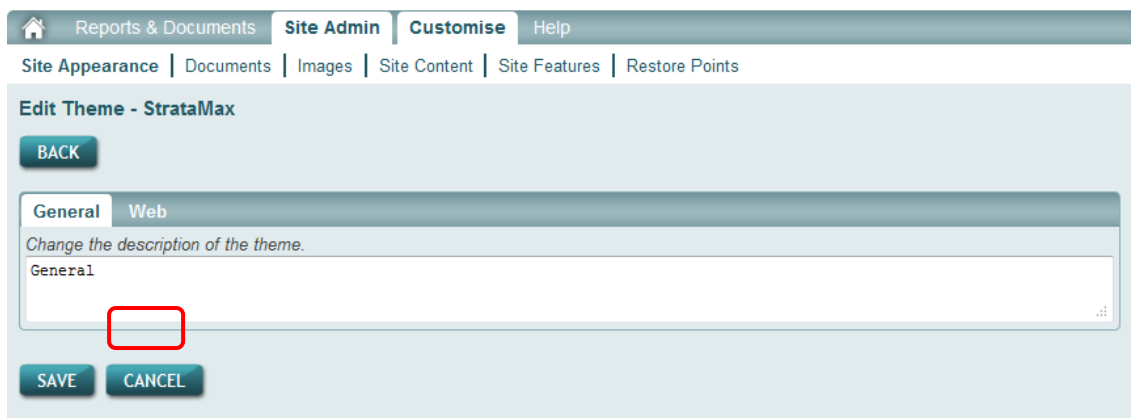
A 'theme' is a series of settings that can be used to set the appearance of your web pages. You can use these to make the website that your owners login to look and feel like your own site, through the colour scheme, logo, and images that appear. A theme can be assigned to an Owners Login Page, a specific building, or assigned as the 'Default' theme across all screens an Owner views.

1. Click Customise
2. Click on Site Appearance
3. Select Create New Theme (*You may set up a number of different themes, which may be assigned*)
4. Give the Theme a new Name and Description
5. Press Create



The screenshot shows the 'Create Theme' form in the StrataMax interface. The navigation bar includes 'Reports & Documents', 'Site Admin', 'Customise', and 'Help'. Below the navigation bar, there are links for 'Site Appearance', 'Documents', 'Images', 'Site Content', 'Site Features', and 'Restore Points'. The 'Create Theme' form has a title 'New Theme' and a subtitle 'This section allows you to customise the appearance of the site by creating a new theme.' There are two input fields: 'Name:' with the value 'StrataMax' and 'Description:' with the value 'General'. At the bottom of the form are two buttons: 'CREATE' and 'CANCEL'.

6. Select the Web tab to now customise the colours and save the logo for this theme



The screenshot shows the 'Edit Theme - StrataMax' form in the StrataMax interface. The navigation bar includes 'Reports & Documents', 'Site Admin', 'Customise', and 'Help'. Below the navigation bar, there are links for 'Site Appearance', 'Documents', 'Images', 'Site Content', 'Site Features', and 'Restore Points'. The 'Edit Theme - StrataMax' form has a title 'Edit Theme - StrataMax' and a subtitle 'Change the description of the theme.' There are two tabs: 'General' and 'Web'. The 'General' tab is selected, and there is a text area with the value 'General'. A red box highlights a small square icon in the text area. At the bottom of the form are two buttons: 'SAVE' and 'CANCEL'.

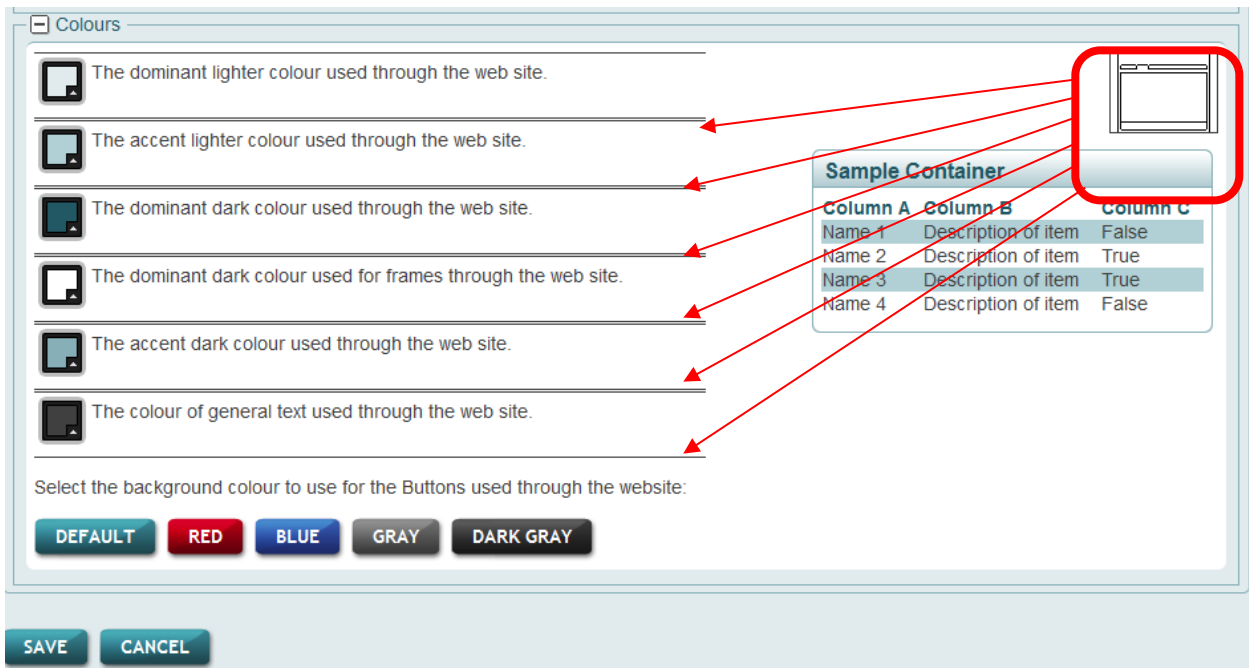
Add Your Company Logo

1. Select Add New Image
2. Select Browse, to find your company logo file
3. Enter Name of Logo
4. Press UPLOAD

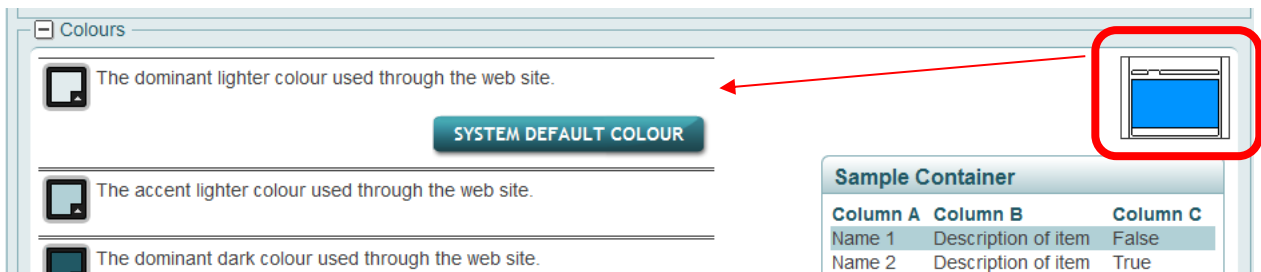
5. Click on Magnifying glass for your logo, this will display top right under current image
6. Press save

Customise your Colours

Each of the colour swatches below show the current colour. When you hover over the colour swatch, the area that you are changing will be identified in the screen shown on the right hand side. See below:



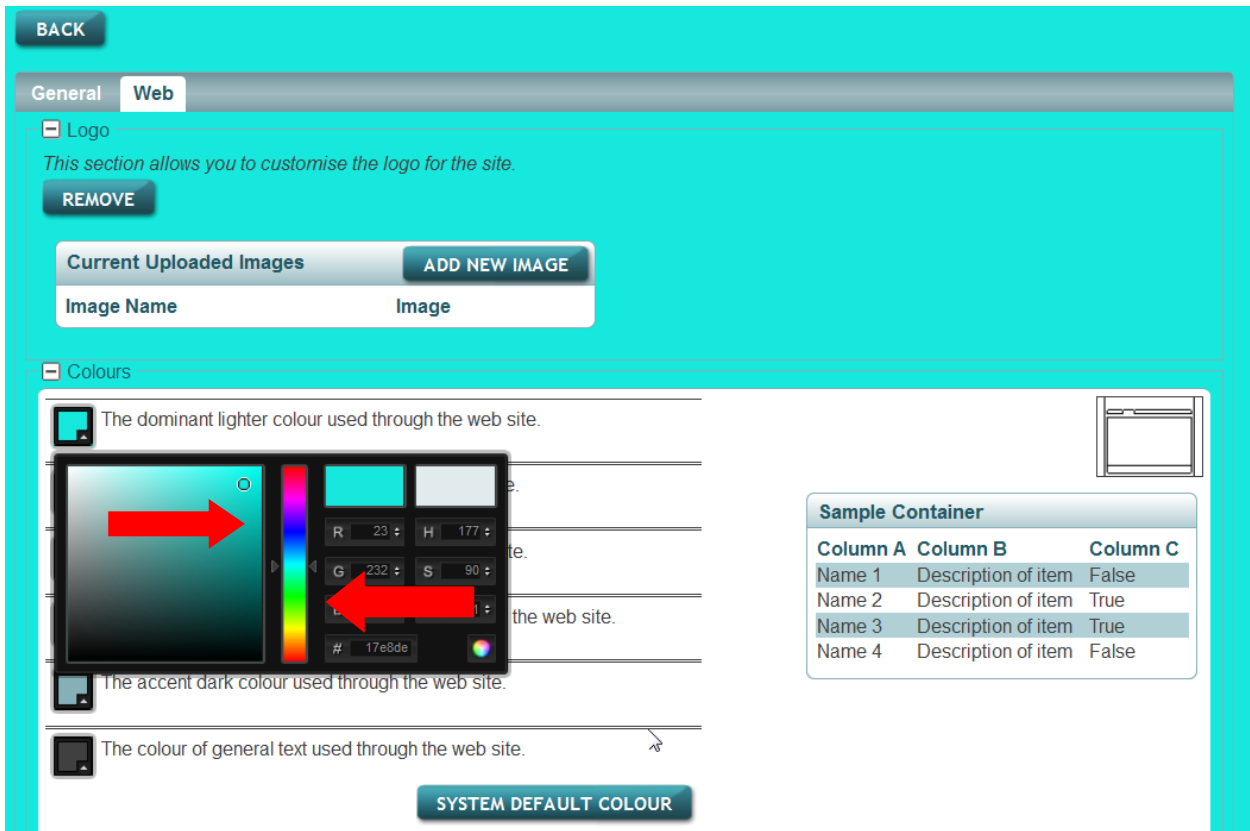
By hovering over the first colour swatch, this shows the area which will change colour:



1. Click the first colour swatch
2. Firstly move the colour slide to the colour type
3. Then move the Circle to reach the desired colour. You will need to move both to reach the desired colour

4. Once you have chosen your main colour, click back on the colour swatch

Refer to example below



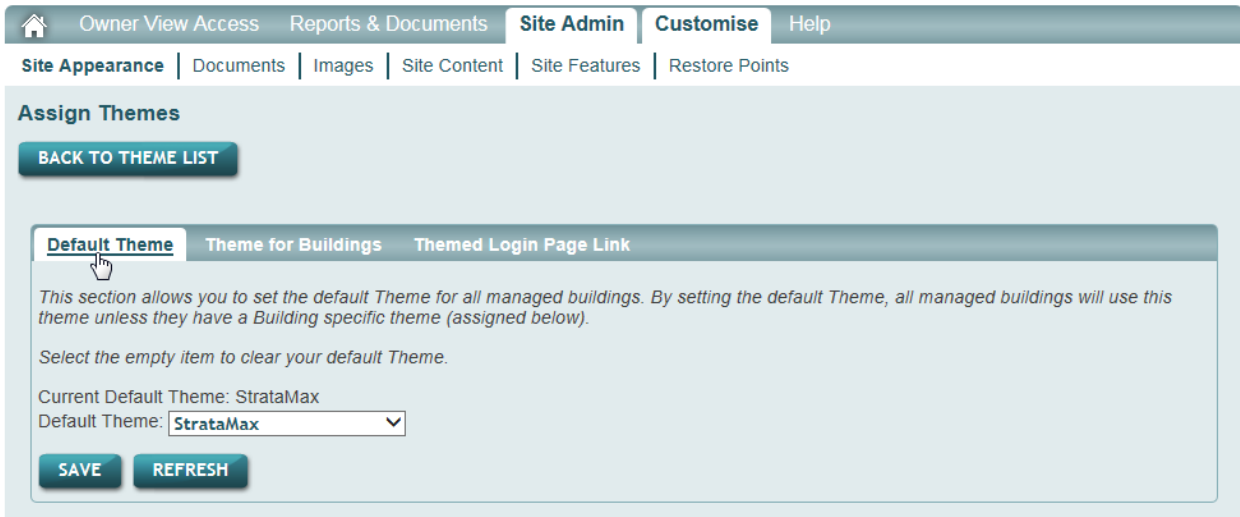
Note: If you are not happy with the colour selected, you are able to press ‘System Default Colour’, which will revert back to the original system colours. You are always able to save what you have done by pressing the ‘Save’ button at the bottom, and come back to edit the theme.

- 5. Repeat this process with each colour swatch
- 6. Press Save & OK

Assign a Theme

Now that you have created a Theme, you must **assign** the Theme for it to take effect.

1. Click Assign Themes
2. Select the Theme from Default Theme dropdown list
3. Press SAVE & OK

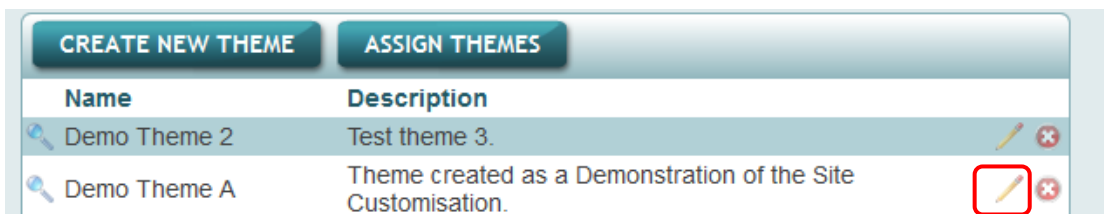


4. Select Back to Theme List
5. You may preview the theme, click on the Magnifying Glass or Log out and back in to see your new Online Owners Portal Site with the default them applied

Edit the Assigned Theme

If you need to make any changes to a Theme, you may do so by editing the Theme

1. Select Site Customisation ('click here' in the text box)
2. To Edit, click the Pencil icon on the Theme



3. Click on the tab 'Web'
4. Then amend your colours or logo, as per the previous steps and once you have finished, Press SAVE

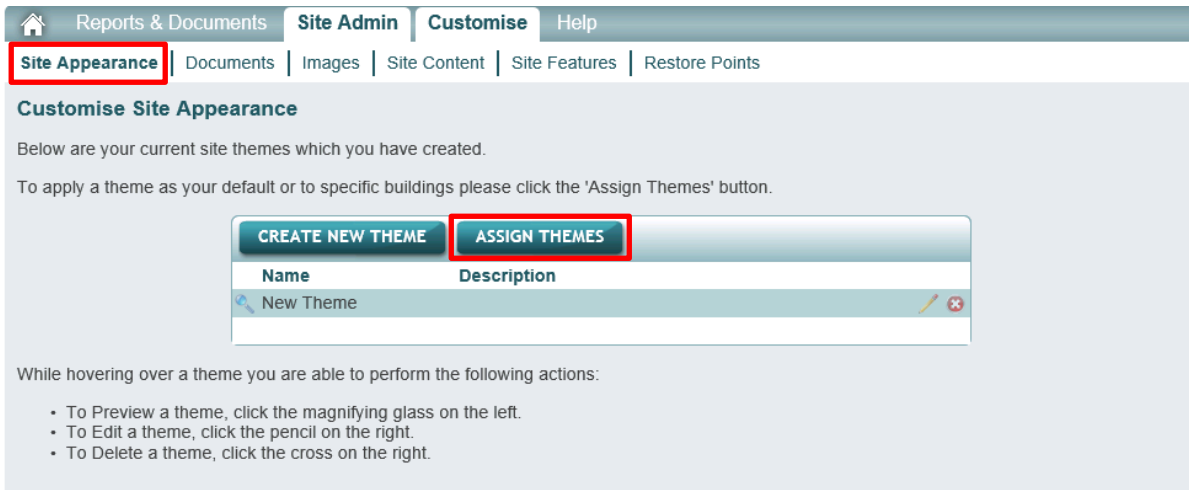
Note: When you go to select the building the Blue Dot will become visible, click on the Blue Dot to select

Creating ^[RBI] a Custom Login Page

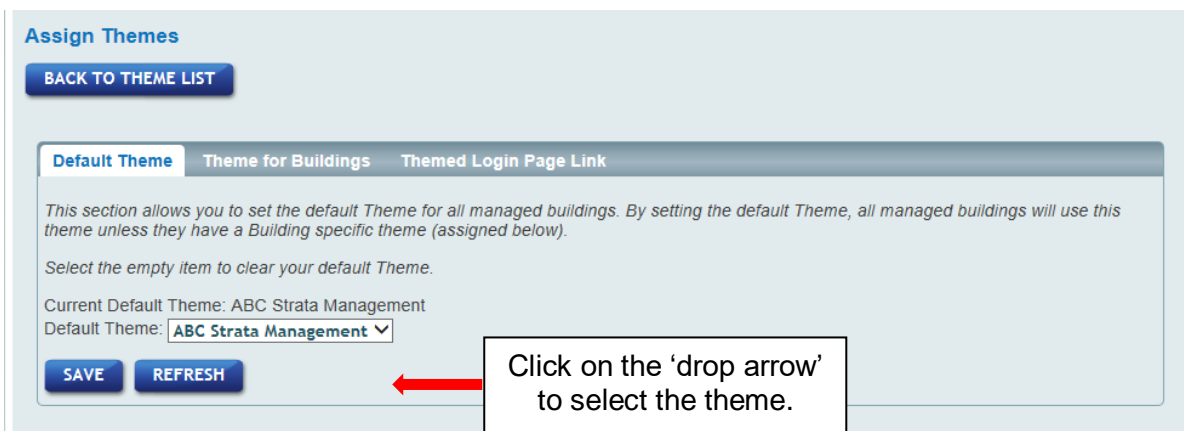
The first step to creating a custom login page is to create a theme. If you don't have a theme please review the StrataMax Portal manual under section [Site Customisation](#).

After you have set your theme you can continue with the setup of a login page for owners that can be copied as a link to your own web site.

1. Login using Manager's login and password
2. Select Customise
3. Site Appearance
4. Select Assign Themes



5. Select the created 'Default Theme' eg: New Theme



6. Click Save & OK

- 7. Click on 'Themed Login Page Link'
- 8. Copy the link and place it within the 'StrataMax OWNERS LOGIN' logo on your web site

The screenshot shows the 'Assign Themes' interface. At the top, there is a 'BACK TO THEME LIST' button. Below it, there are three tabs: 'Default Theme', 'Theme for Buildings', and 'Themed Login Page Link'. The 'Themed Login Page Link' tab is active. The main content area contains the following text: 'The Themed Login Page Link allows you to place a hyperlink anywhere on your site that will direct your users to StrataMax Online Portal with your custom Theme being applied instantly. You must be logged out in order to view the Login page. Themed Login Page Link for the Current Default Theme: https://beta-www-stratamax-com-au/Portal/MAX001 [Copy this link and place it within a hyperlink on any page within your web site.] Themed Login Page Link for a specific building: [Copy this link and place it within a hyperlink on any page]'. A red arrow points from the 'Themed Login Page Link for a specific building:' text to a text box containing the URL 'https://beta-www-stratamax-com-au/Portal/MAX001'. A callout box with a black border and white background contains the text 'The link can be embedded into the 'StrataMax OWNERS LOGIN''.

If you would like to use a branded 'StrataMax OWNERS LOGIN' button please click [here](#) for instructions and guidelines for use.

*Click Ctrl & left mouse button on either of the 'StrataMax OWNERS LOGIN' below to see the login page.



If you want to setup a link that is specific for a building, click on 'SELECT BUILDING' and select the building, copy the link and place it within the 'StrataMax OWNERS LOGIN' logo on the web site.

NOTE: If you want a link for several buildings you will need to select each building as it is a unique URL for each building.

TROUBLESHOOTING

Q: I can't see a link when I click on 'Customers Portal Link' tab?

A: No Default Theme has been assigned; you will need to select a 'Default Theme'

Documents

Owner View Access | Reports & Documents | Site Admin | **Customise** | Help

Site Appearance | **Documents** | Images | Site Content | Site Features | Restore Points

Documents

You can upload documents here for you to display on your site. These documents can be displayed on your custom pages by inserting them into text within Text Block Content Items.

Documents

- Documents
 - By-Law
 - Newsletter
- By-Law
- Newsletter
- Custom Entitlements.pdf
- Newsletter.docx
- Stationery Form.docx
- Training Form.docx

Sub Folders can be created under each of the main

CREATE NEW FOLDER | UPLOAD NEW ITEM(S)

Uploading documents here is for more generic documents that need to be across more than one building. Eg: By-Laws or a Newsletter.

If the document is for a specific building please continue to use DocMax to upload the document automatically.

1. Click 'Customise'
2. Click 'Documents'
3. Click 'Create New Folder', storing documents under the building number as an example helps to locate documents quickly
4. Enter name for the folder and click 'Create Folder' (*if left blank the name will be the file name*)
5. Highlight the folder and then click 'Upload New Item(s)' Click 'Browse' and select the document
6. Click 'Upload' more than one document can be uploaded at a time to the same folder.

Upload New Items

Please select one or more files to upload, then click the Upload button when ready.

Name: File:

(leave the 'Name' field blank to use the file name)

Name: File:

Name: File:

Note: Maximum combined upload file size: 4MB

Click on the + (plus) sign to add additional documents & upload all with one click

You can now see the documents uploaded by clicking on the folder on the left. All documents in this folder will be displayed on the right.

Documents

You can upload documents here for you to display on your site. These documents can be displayed on your custom pages by inserting them into text within Text Block Content Items.

Documents

- Documents
- By-Law
- Newsletter**

By-Laws General 2012.docx

Rename

Click on the pencil to re-name the document

Check This Out!

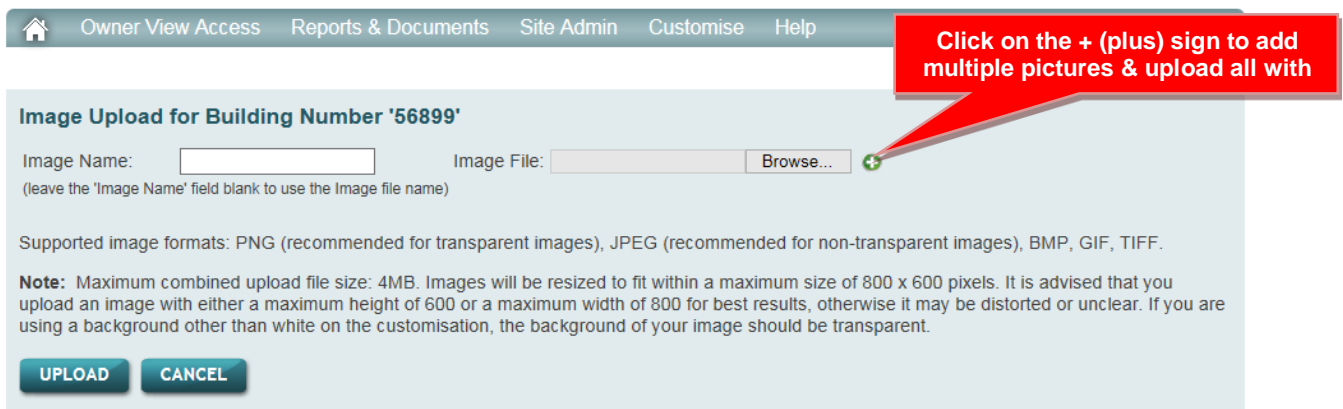
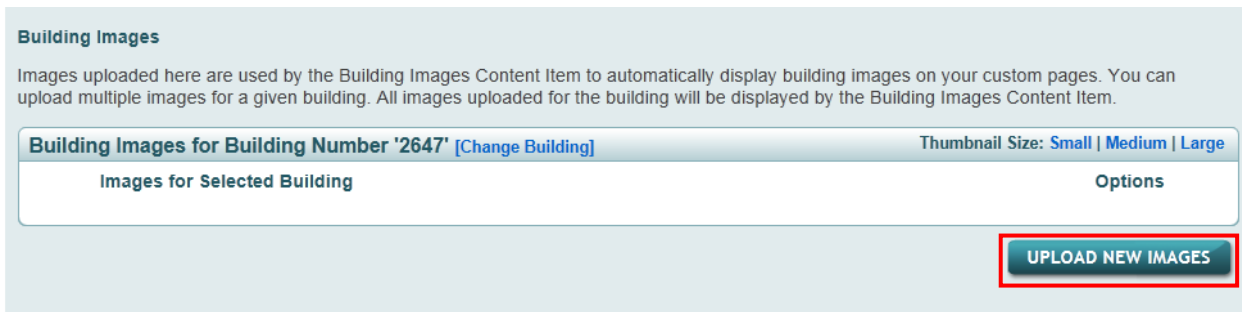
*Documents - add a newsletter or advise owners of any changes to the Act.
The documents will be available to add to the pages created by you.*

Images

Building Images for Building Number - to personalise a home page add images of the building. All images uploaded for the building will be displayed by the Building Images Content Item.

1. Click 'Customise'
2. Click 'Images' (*scroll down the page past Miscellaneous Images*)
3. Click 'Upload New Images' (*Maximum upload file size is 4MB*)
4. Click 'Browse' to select the image and 'Open'
5. Add Image Name or leave blank to use the image file name
6. Click 'Upload'

Click on [\[Change Building\]](#) to add pictures to the next building.

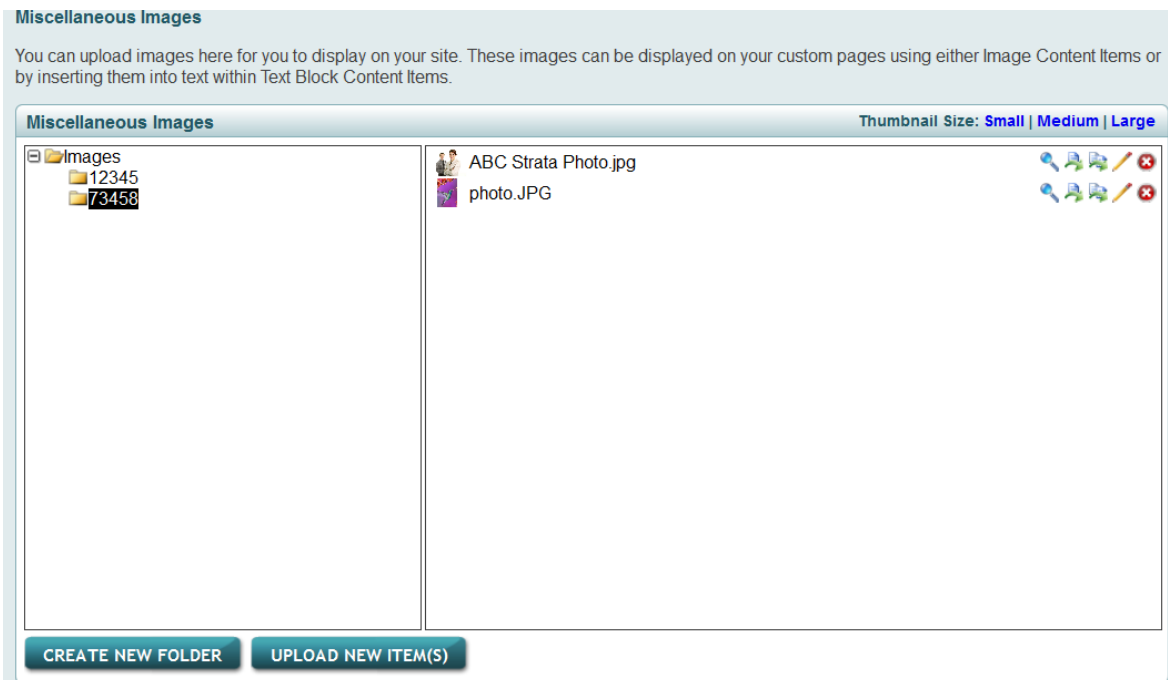


Note: If you want to select the images to be displayed see -Miscellaneous Images on the next page

Miscellaneous Images - images for general use on a page created for one or all buildings. With the miscellaneous images you can select each image individually and add to the custom pages. *(The image could be of your office or a general picture of a swimming pool)*

7. Click 'Images'
8. Select the Folder *(that you want to add the image into)*
9. Click 'Upload New Item(s)' *(Maximum upload file size is 4MB)*
10. Click 'Browse' to select the image and 'Open'
11. Name the Image or leave Image name blank to use the Image file name
12. Click 'Upload'

You can now see the images uploaded.



LEGEND

1. Magnifying Glass
2. Move Image or Document
3. Copy Image or Document
4. Rename / Edit
5. Delete

Site Features

Contact Us Configuration – you have the ability to setup separate email addresses for each department enquiry or a specific building on the Contact Us page.

Category Name and **Email Address to Send Contact Messages To**, are both configurable, except category name of manager, which is determined by the State the building resides.

Customise Site Features

Contact Us Configuration Show/Hide Pages Customise the FAQ

Specify the different categories of contact to be presented on the Contact Us page.



Select a category in the list to see any Building Specific email address configured for that Contact Us page.

NEW CATEGORY

Terminology will be state specific; eg: Body Corporate Manager, Strata Manager

	Category Name	Building Specific Overrides	Email Address to Send Contact Messages To	Show on Menu	Options
Select	[Community Manager]	<input type="checkbox"/>	info@stratamax.com.au		▼ / ✎
Select	Other	<input type="checkbox"/>	info@stratamax.com.au		▲ ▼ / ✎
Select	Levy Enquiry	<input checked="" type="checkbox"/>	jon@test.com	<input checked="" type="checkbox"/>	▲ ▼ / ✎ ✕
Select	Insurance Claim	<input type="checkbox"/>	info@stratamax.com.au	<input checked="" type="checkbox"/>	▲ ▼ / ✎ ✕
Select	Maintenance	<input type="checkbox"/>	info@stratamax.com.au	<input checked="" type="checkbox"/>	▲ / ✎ ✕

Please note that [Community Manager] will be replaced with the Building State specific terminology.

-  **Remember to click the save icon once you have made changes**
-  **Delete button**, when you click on the delete button you will be asked to confirm the deletion; it will be deleted if you say Yes.

Add an Email Address

1. Click Edit (*Pencil Icon*) and select the option
 - a. Use Manager email address: *this is the default email address*
 - b. Use specific email address: *enter a specific email address*
2. Click Save

Customise Site Features

Contact Us Configuration Show/Hide Pages Customise the FAQ

Specify the different categories of contact to be presented on the Contact Us page.
 Select a category in the list to see any Building Specific email address configured for that Contact Us page.

NEW CATEGORY

Category Name	Building Overrides	Email Address to Send Contact Messages To	Show on Menu	Options
Select [Community Manager]	<input type="checkbox"/>	info@stratamax.com.au	<input type="checkbox"/>	▲ ▼ ✎ ✖
Select Other	<input type="checkbox"/>	info@stratamax.com.au	<input type="checkbox"/>	▲ ▼ ✎ ✖
Select Levy Enquiry	<input checked="" type="checkbox"/>	jon@test.com	<input checked="" type="checkbox"/>	▲ ▼ ✎ ✖
Select Insurance Claim	<input type="checkbox"/>	info@stratamax.com.au	<input checked="" type="checkbox"/>	▲ ▼ ✎ ✖
<input type="text" value="Maintenance"/>	<input type="checkbox"/>	<input type="radio"/> Use Manager email address <input checked="" type="radio"/> Use specific email address: <input type="text" value="Maintenance@stratamax.com"/> x	<input checked="" type="checkbox"/>	▲ ▼ ✎ ✖

Please note that [Community Manager] will be replaced with the Building State specific terminology.

The main email address, 'info@stratamax.com.au' is a default address and is the main email address that you have supplied to StrataMax (Administration). You can select 'Use specific email address' if you would like to use a different email address.

Show on Menu - untick to remove the category from the view of owners, it is not on a per building basis.

▲ ▼ **What Is This?**

Clicking on the triangle allows you to change the order of the list

NEW CATEGORY – adds a new contact category for owners.

1. Click on ‘NEW CATEGORY’, a new line will appear and you can enter the name of the new category
2. Select either ‘Use Manager email address’ (as provided to StrataMax); ‘Use specific email address’ or; - enter an email address
3. Click Save

Customise Site Features

Contact Us Configuration Show/Hide Pages Customise the FAQ

Specify the different categories of contact to be presented on the Contact Us page.
 Select a category in the list to see any Building Specific email address configured for that Contact Us page.

NEW CATEGORY

Category Name	Building Overrides	Email Address to Send Contact Messages To	Show on Menu	Options
Select [Community Manager]	<input type="checkbox"/>	info@stratamax.com.au		▼ / ✎
Select Other	<input type="checkbox"/>	info@stratamax.com.au		▲ ▼ / ✎
Select Levy Enquiry	<input checked="" type="checkbox"/>	jon@test.com	<input checked="" type="checkbox"/>	▲ ▼ / ✎ ✖
Select Insurance Claim	<input type="checkbox"/>	info@stratamax.com.au	<input checked="" type="checkbox"/>	▲ ▼ / ✎ ✖
Select Maintenance	<input type="checkbox"/>	info@stratamax.com.au	<input checked="" type="checkbox"/>	▲ ▼ / ✎ ✖
<input type="text" value="New Category"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Use Manager email address <input type="radio"/> Use specific email address: <input type="text"/>	<input type="checkbox"/>	▲ ▼ / ✎ ✖

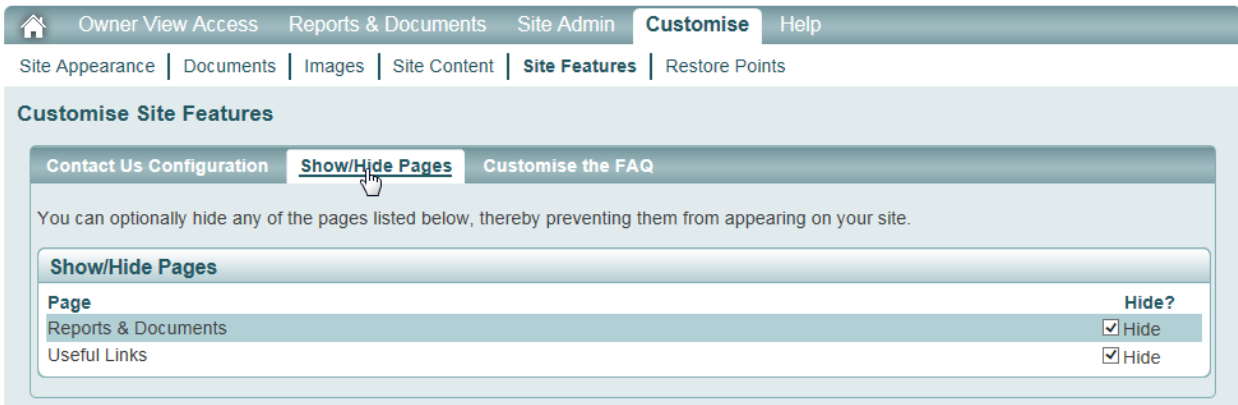
Please note that [Community Manager] will be replaced with the Building State specific terminology.

 **Remember to click the save icon once you have made changes**

Show / Hide Pages

Reports & Documents – tick Hide, this will hide Reports and Documents from owners. Reports and Documents menu has all the reports and documents from BCMax and DocMax.

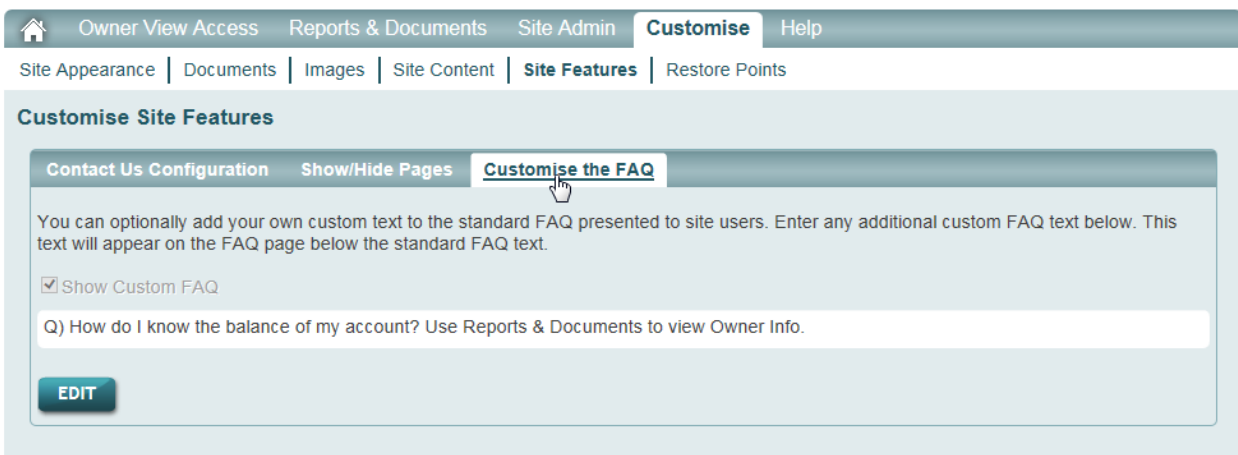
Useful Links – the useful links area is a page of links to the different Acts in Australia. If you tick Hide, this will hide the useful links menu from [owners\[CJ2\]](#).



Customise the FAQ (Frequently Asked Questions)

There are standard FAQ's already on the Portal but from here you can optionally add your own custom text to the standard FAQ available to owners. To view the standard FAQ, click on Help and then FAQ.

Note: The standard FAQ's cannot be hidden or removed.



Show Custom FAQ – while you are editing the FAQ page you can untick Show Custom FAQ so owners don't see an unfinished question.

Click EDIT, add your questions and answers.

Owner View Access | Reports & Documents | Site Admin | **Customise** | Help

Site Appearance | Documents | Images | Site Content | **Site Features** | Restore Points

Customise Site Features

Contact Us Configuration | Show/Hide Pages | **Customise the FAQ**

You can optionally add your own custom text to the standard FAQ presented to site users. Enter any additional custom FAQ text below. This text will appear on the FAQ page below the standard FAQ text.

Show Custom FAQ

B *I* U ABC | **A** **ab** | [List Icons] | [Link Icons] | [Image Icons] | [Table Icons] | Merge Fields

Q) How do I know the balance of my account? Use Reports & Documents to view Owner Info.

SAVE **CANCEL**

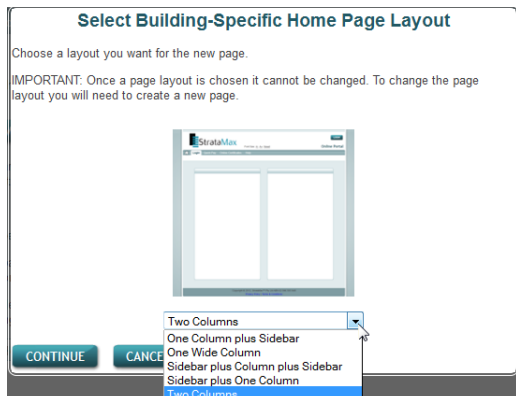
Once you have finished your FAQ's you can tick Show Custom FAQ and then click SAVE.

Site Content

Create New Building – Specific Home Page

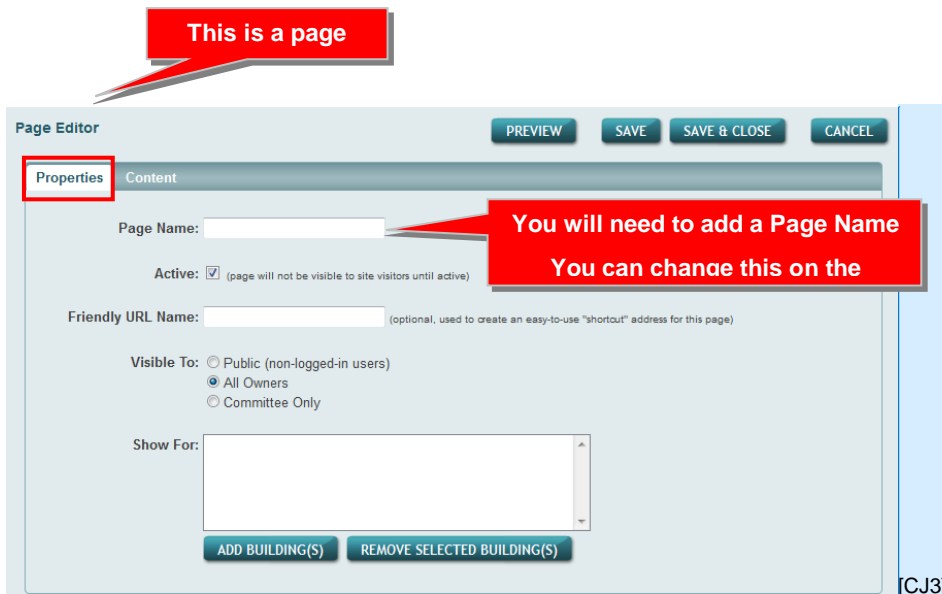


1. Click 'Customise'
2. Click 'Site Content'
3. Click 'Create New Building – Specific Home Page'



4. From the drop box, select the type of layout from format of columns and sidebars.
5. Click 'Continue'
6. You can now proceed with creating your Specific Building Home Page Layout.

Main Page Properties – Building Specific Home Page



7. The friendly URLs are to enable Managers to give out easy-to-read/type URLs for their Portal. There are two different types of friendly URLs:

- www.StrataMax.com.au/page/manager-reference
- www.StrataMax.com.au/page/manager-reference/some-page-reference

The first type is for accessing themed login pages. The second is for accessing arbitrary pages under a given manager, as dictated by the manager.

Example of using the first type:

If you navigate to www.StrataMax.com.au/page/manager-reference then you get the themed login page for that manager. E.g. if you go to www.StrataMax.com.au/page/max001 you get the MAX001-themed login page.

Example of using the second type:

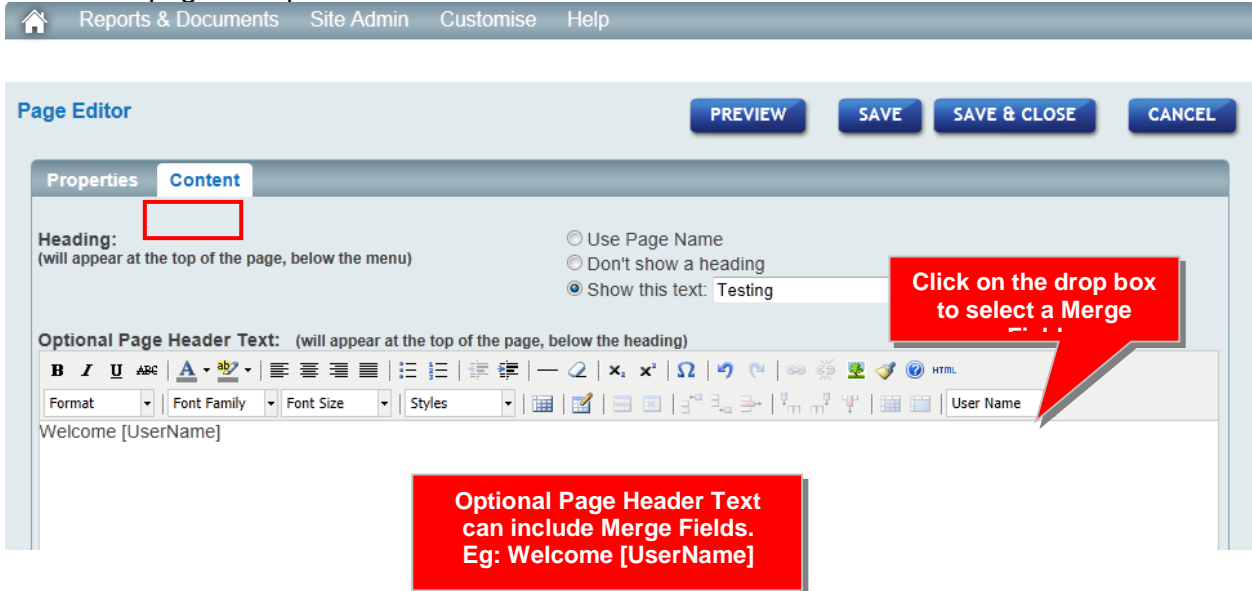
If you are running a special promotion you can create a dedicated page for the promotion and give it a friendly url (e.g. www.StrataMax.com.au/max001/sale2012) which can then be displayed on marketing materials etc. Users can see these URLs and then type them into their browser easily.

- 8. Visible To: Choose whether to make this a Public page, All Owners or Committee Only
- 9. Show For: Select 'Add Building(s)'. Select building/s to make this a building specific page

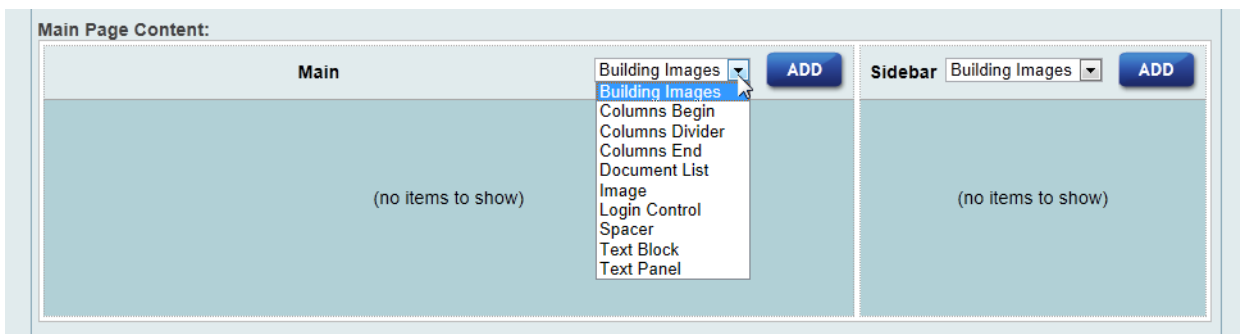
10. Click 'SAVE', 'PREVIEW' or 'SAVE & CLOSE'

Main Page Content – Building Specific Home Page

1. Click 'Customise' & 'Site Content' (*if you have closed the page*)
2. In the 'Building-Specific Home Pages' Click 'Pencil' icon to edit your new created page
3. The page will open on the 'Content' tab

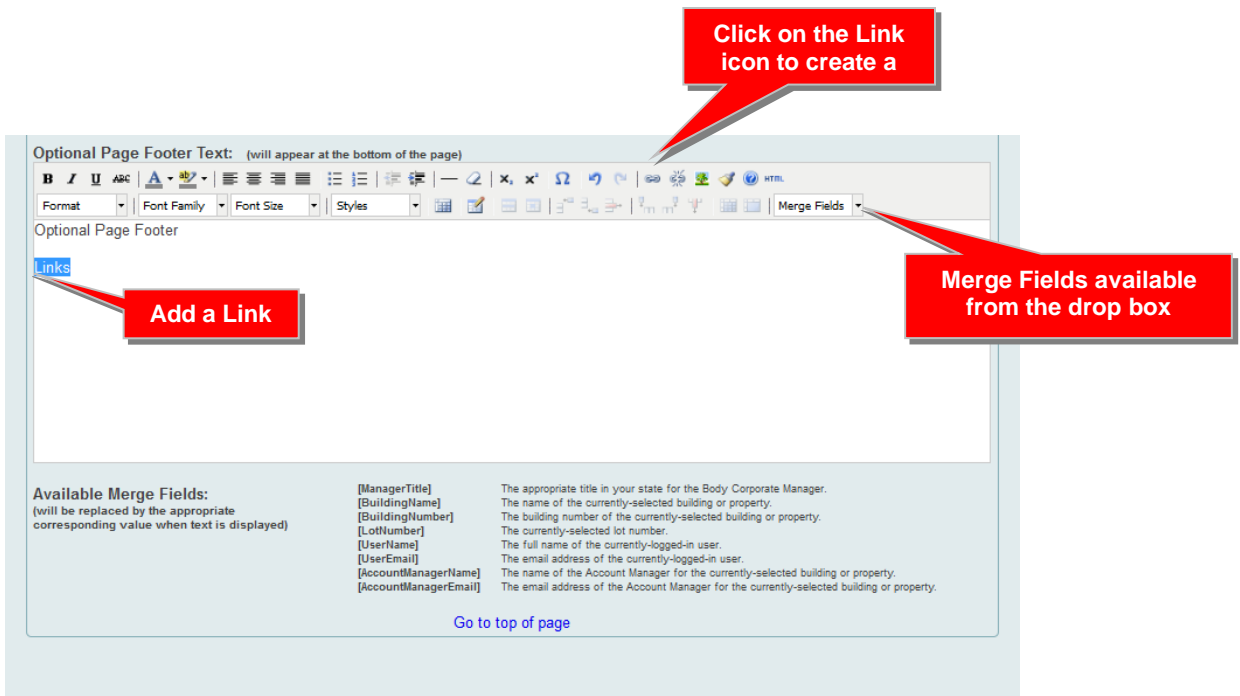


4. Select a Heading if required, 'Use Page Name' (created on the Properties Page), 'Don't show a heading' or 'Show this text', enter a different name
5. You can now enter text in the white box but this is an Optional Header so it is not required. In the header box you can merge fields, images or links see ['Tool Explanations'](#) on page 62 to see what options are available from the tool bar
6. Main Page Content: Building Images, Columns Begin, Columns Divider, Columns End, Document List, Image, Login Control, Spacer, Text Block and Text Panel by selecting the option and clicking ADD. All of the above can be added from any of the Home Page Layouts.



If you are inserting an Image in the Main Page Content, select Image from the drop down list and click ADD, select the image that you uploaded to the Miscellaneous Images, go to page 46.

Adding Building Images for each building go to page 43



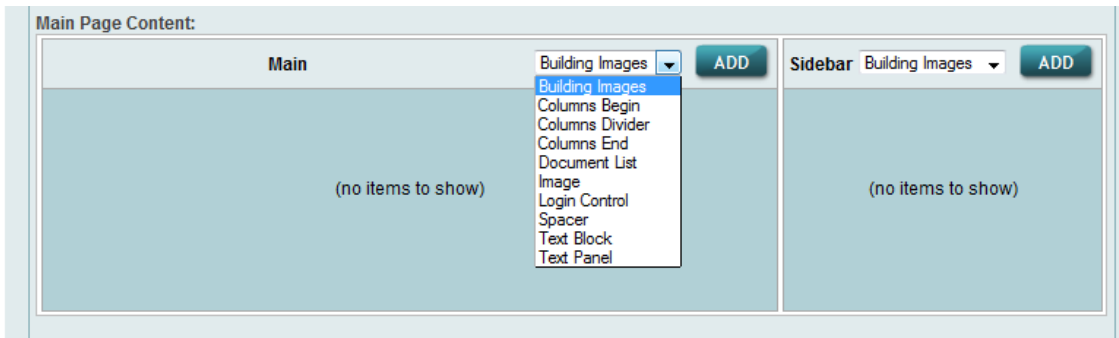
7. You can now add text in the white box but this is an Optional Footer so it is not required. In the footer box you can add tables, merge fields, images or links see '[Tool Explanations](#)' on page 62 to see what options are available from the tool bar.

Using the Merge Fields throughout the custom pages helps personalise the portal for the owners.

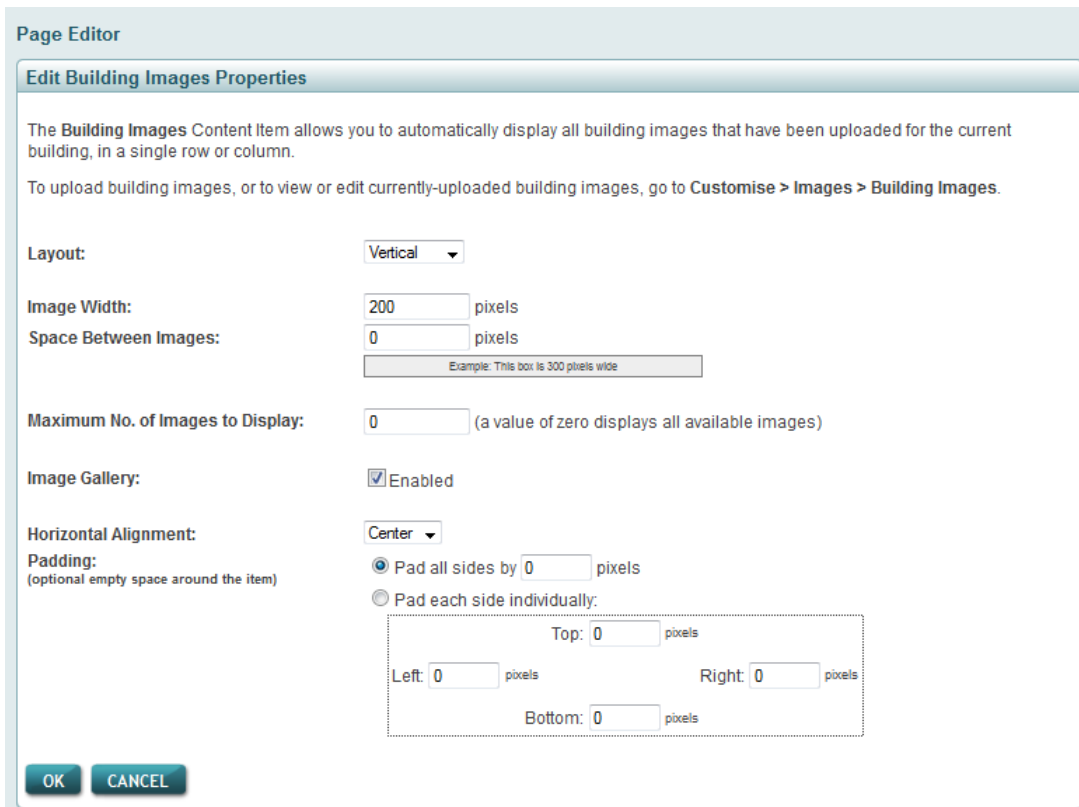
Once you have entered the information, click SAVE and then click PAGE PREVIEW.

Adding Content Containers (Blocks) – Explanations

When you click on the drop box next to the ADD button you will be given a selection of different options that you can add to the customised page.

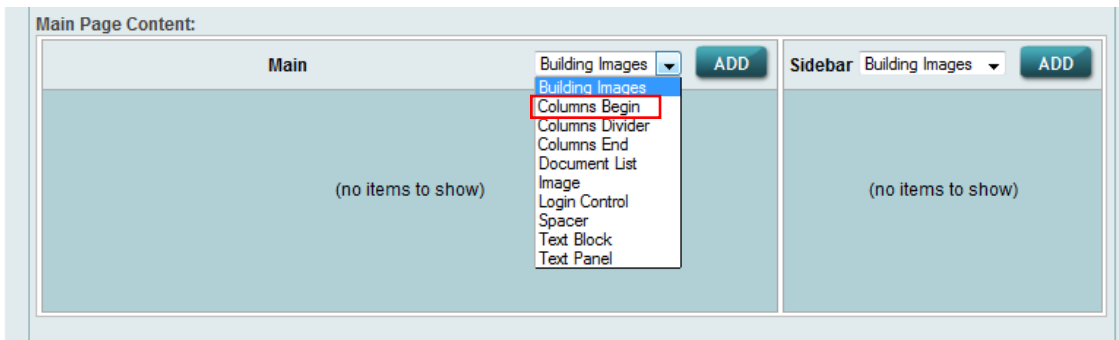


Building Images – select ADD, the window below will appear and you can adjust the image properties. The building images are the ones that you uploaded to 'Customise', 'Images' and 'Building Images for Building Number No.'. When an owner logs in they will only see their building images.

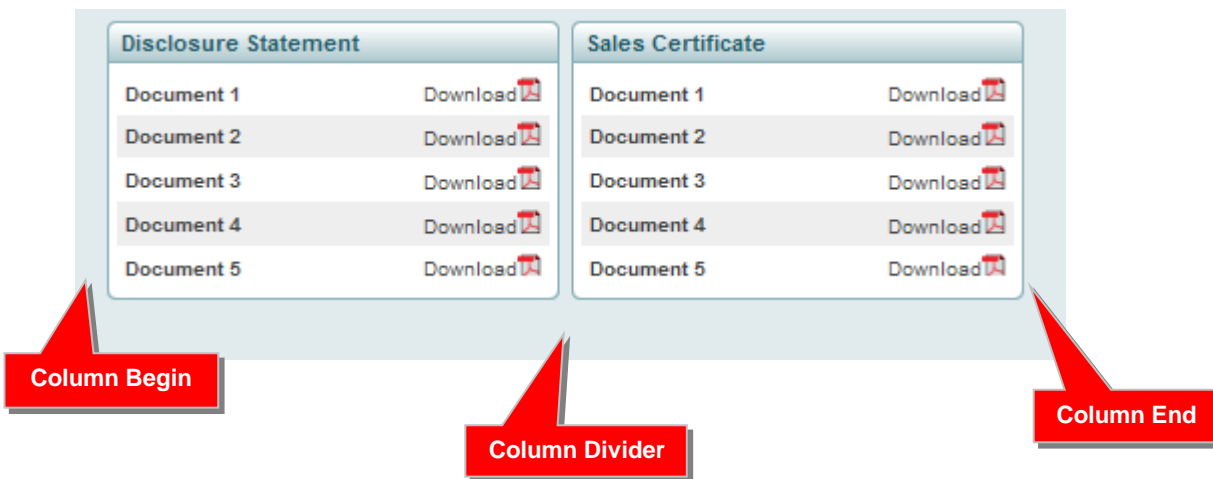


These images are specific to the building, so they would be an image of the building or the surrounding area.

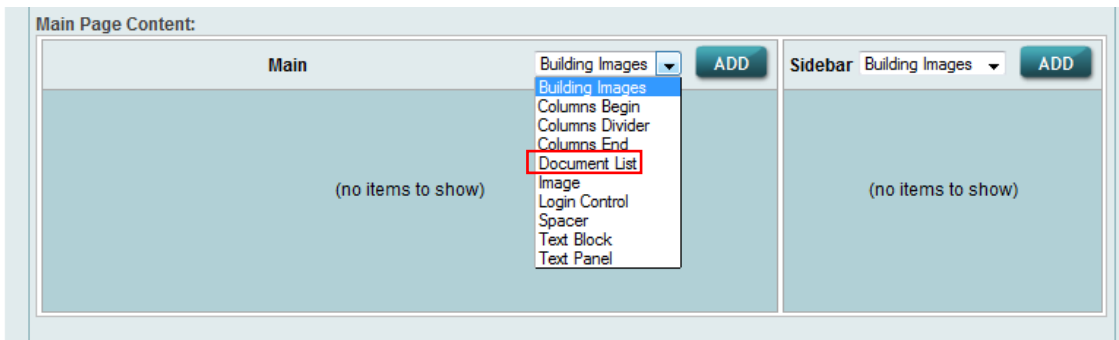
Columns Begin – select ADD



Adding dividers helps separate the documents or images into columns. When you select Columns Begin the program will automatically add Columns Divider and Columns End. Add any extra column dividers if you would like more than two columns.

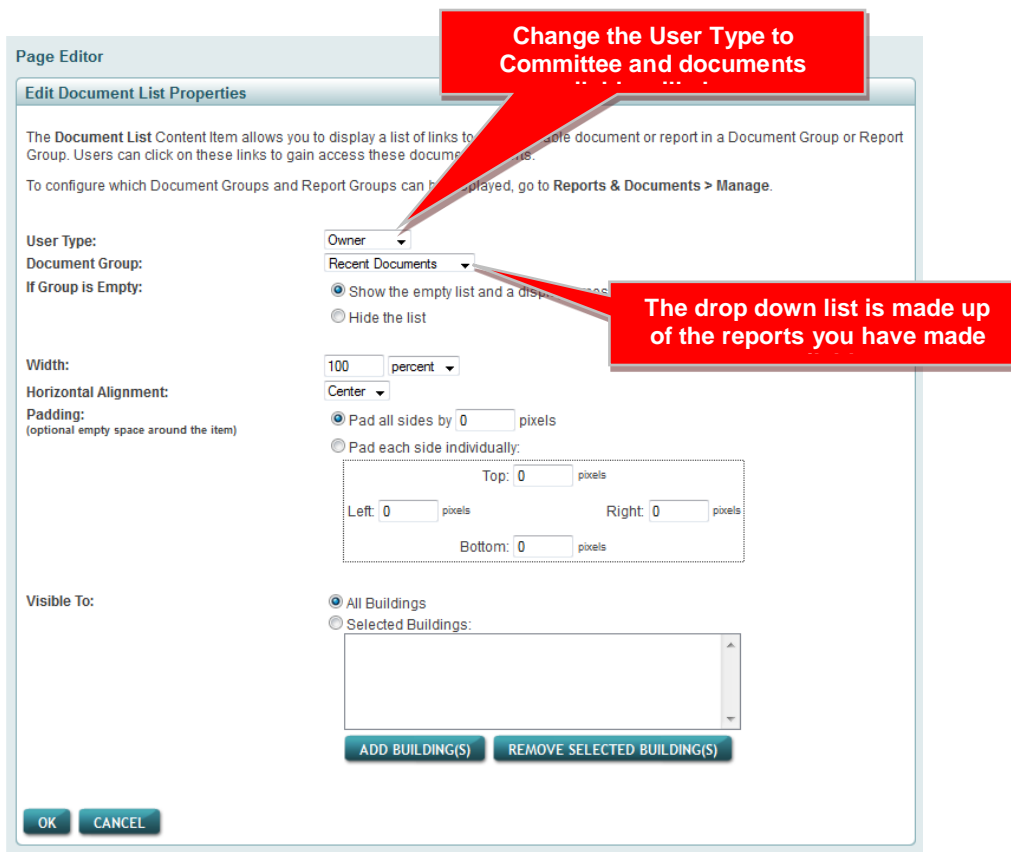


Documents List - select ADD



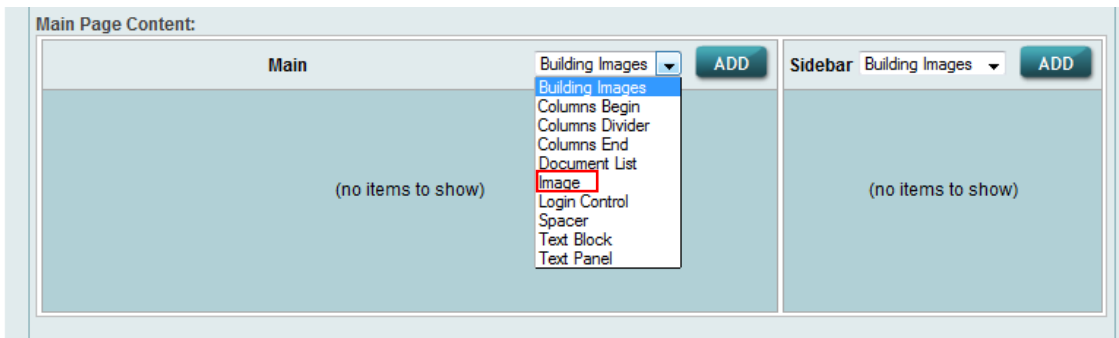
The window below will appear and you can select a document from the list and adjust the properties.

When you select the Owner from the drop down list you will be presented with the documents you have made available for Owners in Reports and Documents on [page 7](#) of this manual. If you change the user type to Committee the documents will then change to that setup in reports and documents.



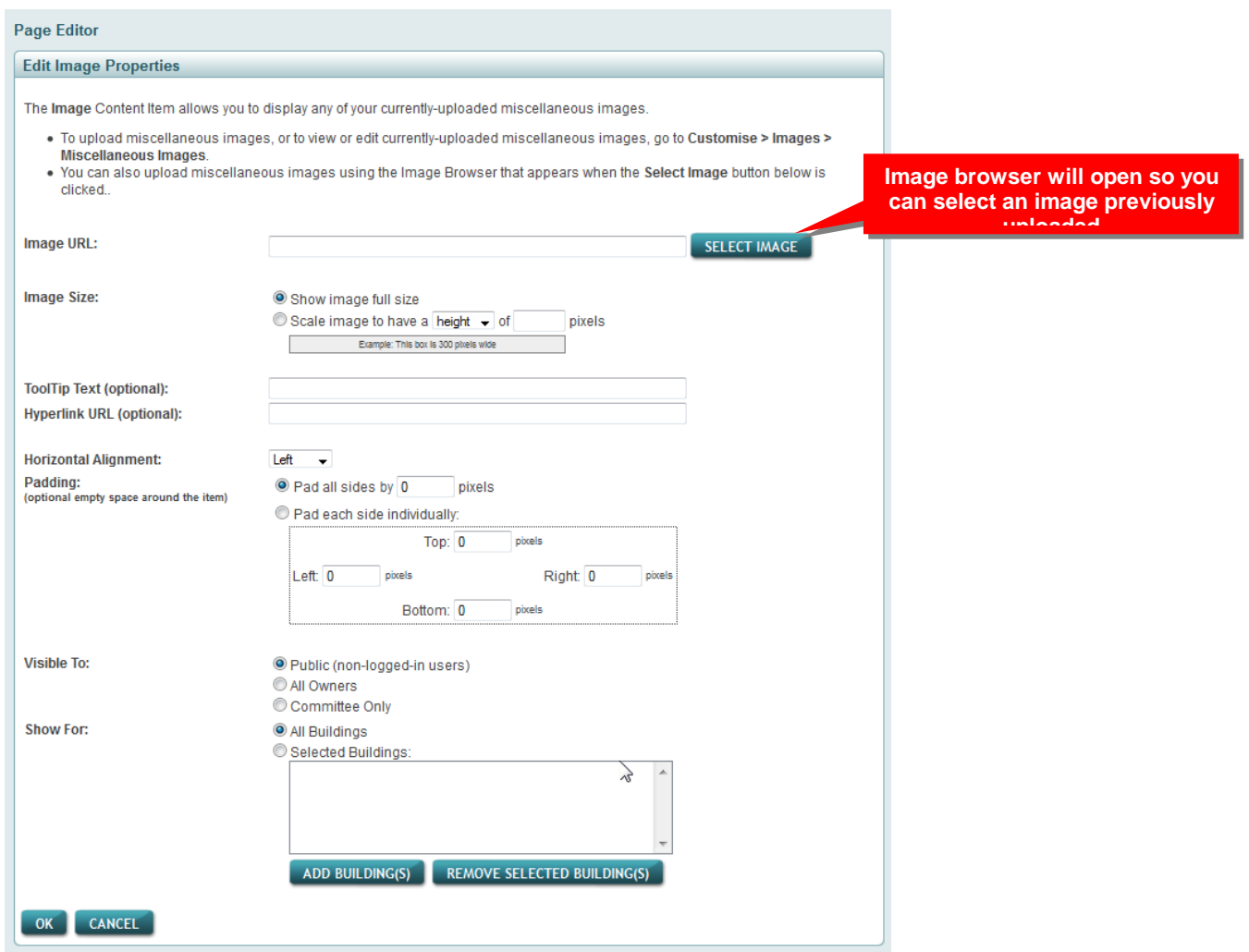
Enter all the properties required and click OK.

Image – select ADD



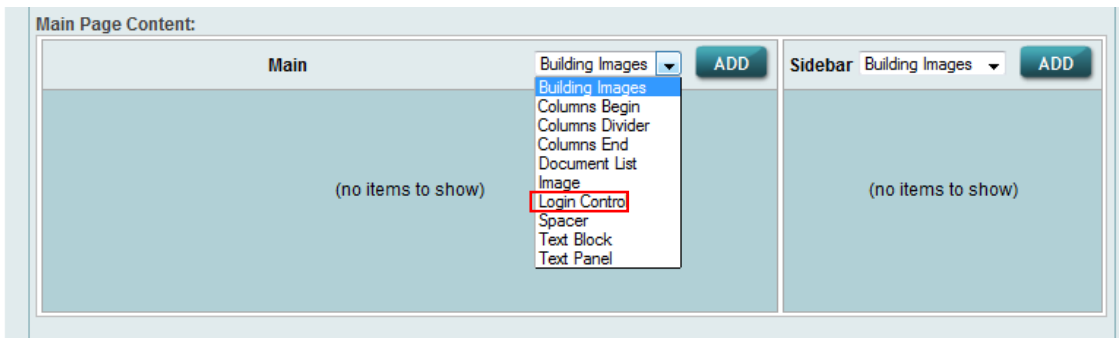
When you add an image from within the Main Page Content it will be a Miscellaneous Image previously uploaded in 'Customise', 'Images'.

The window below will appear and you can add an image and adjust the properties.

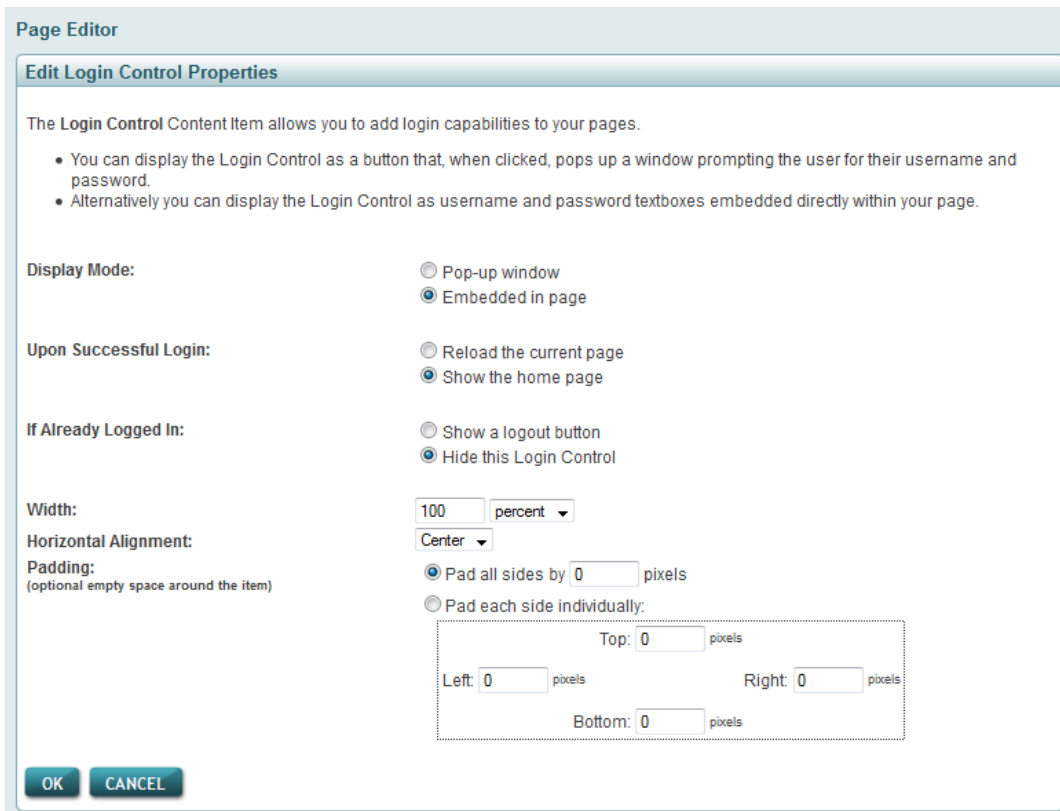


Enter all the properties and click OK.

Login Control - select ADD

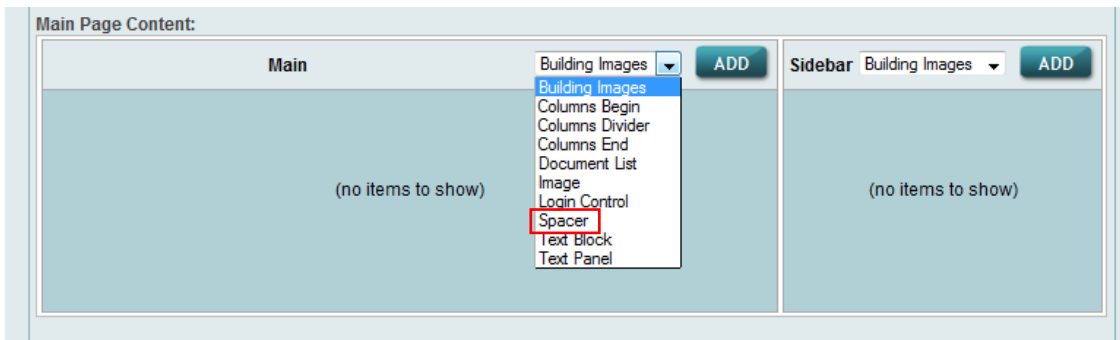


The window below will appear and you can adjust the Login Controls to Pages created.



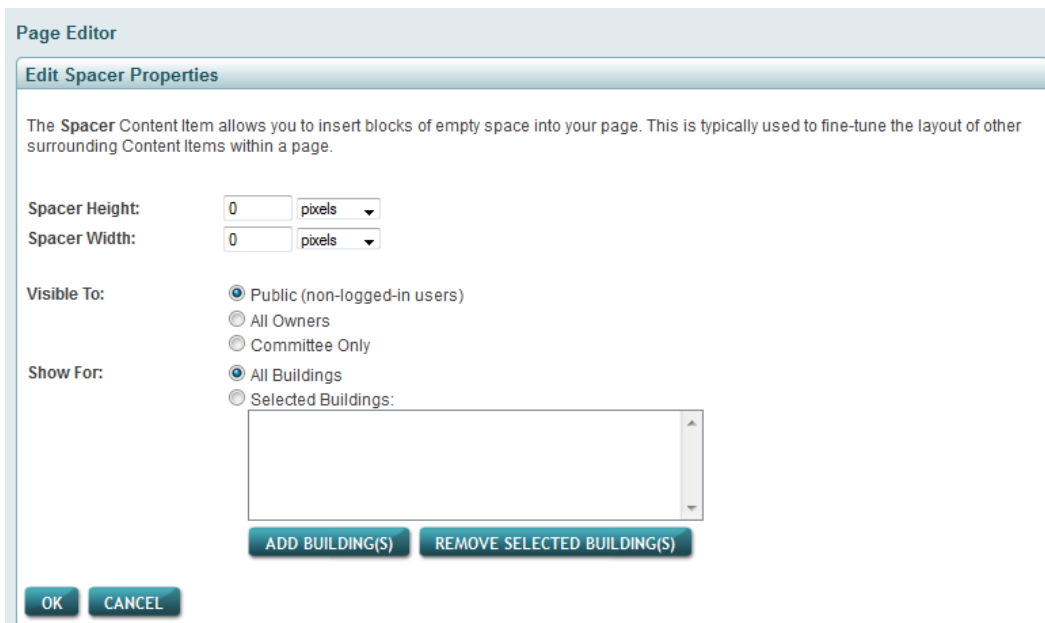
Enter all the properties required and click OK.

Spacer - select ADD



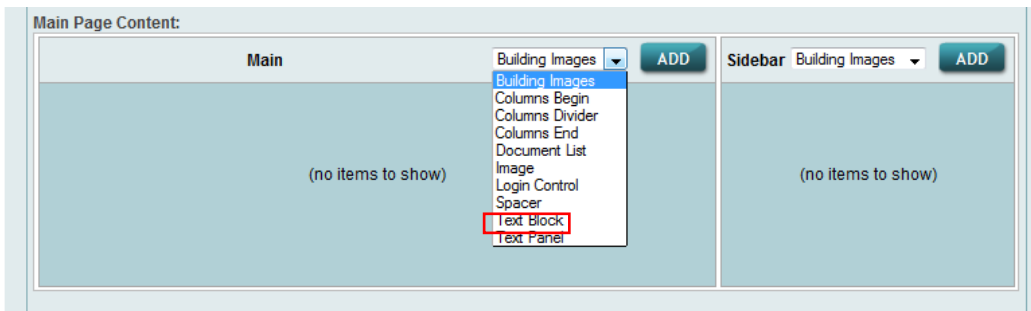
The window below will appear and you can adjust the Spacer Properties. Spacers help to fine tune the layout of your pages.

If you make the spacer too large it can move your other containers (content) move off the page.

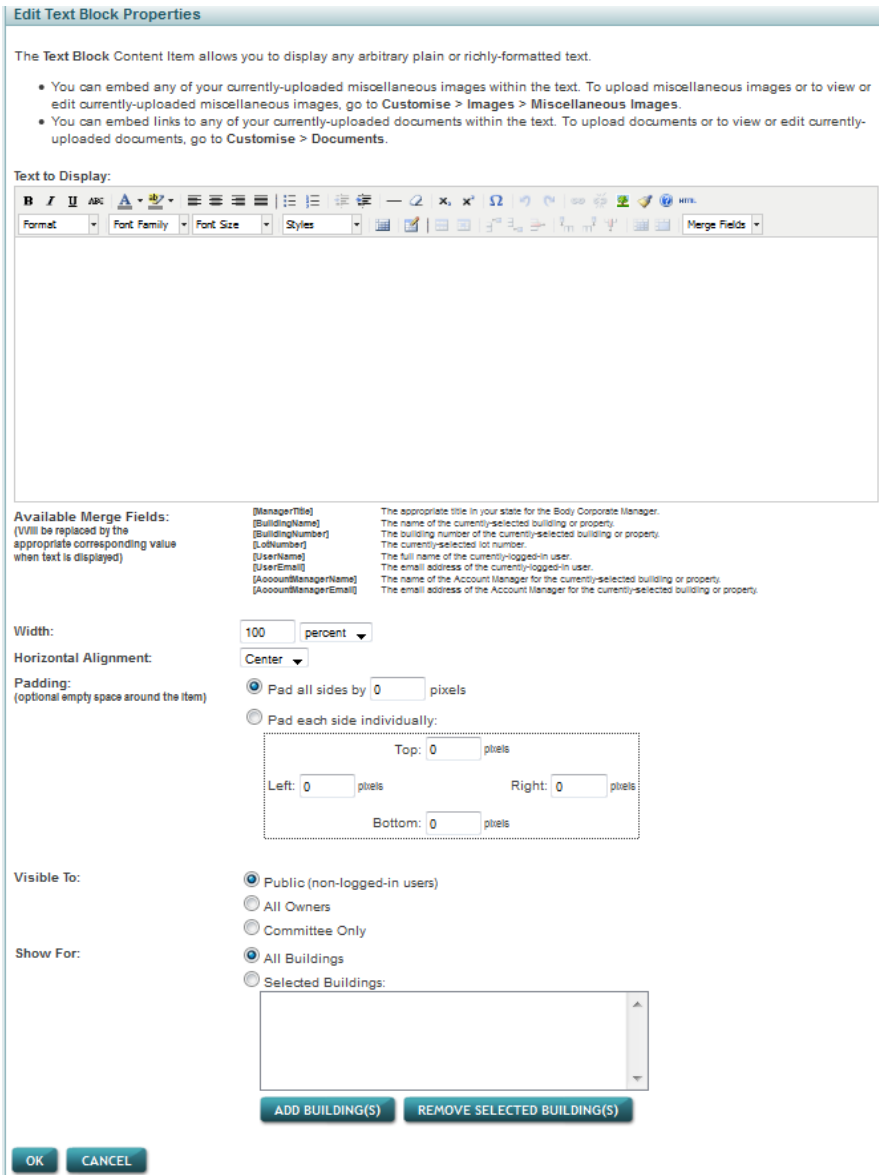


Enter all the properties required and click OK.

Text Block – select ADD

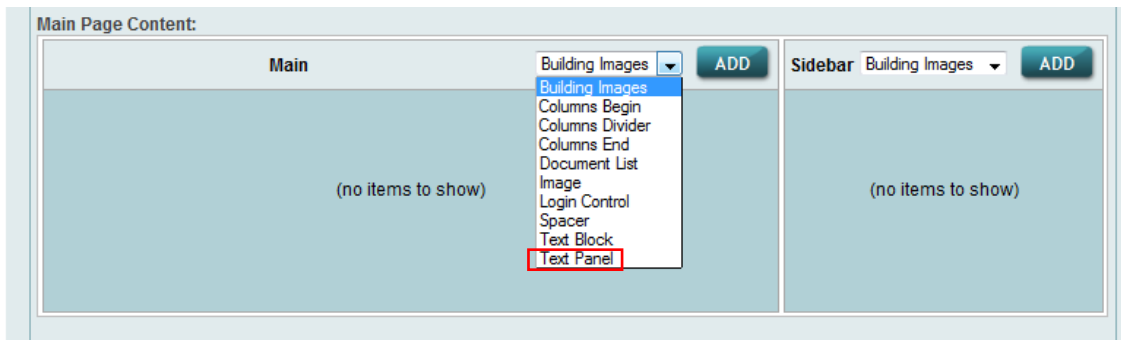


The window below will appear and you can add and adjust the content for a Block of Text. Text will appear as a block on the page. The tool bar in the Text to Display is the same as what was used on the Optional Header and Footer. See page 62, [Tool Bar Explanation](#).

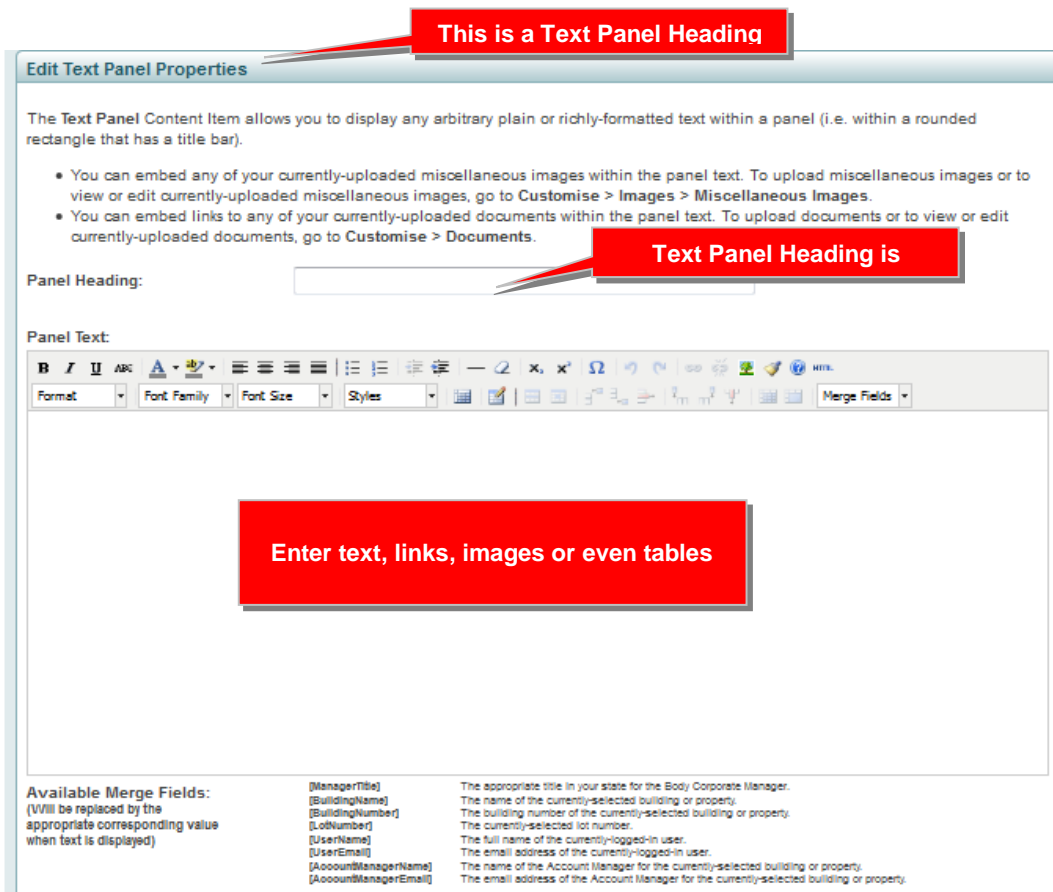


Enter all the properties required and Click OK.

Text Panel – select ADD



The window below will appear and you can add and adjust the content for a Text Panel block of text.



The tool bar in the Panel Text is the same as what was used on the Optional Header and Footer. See page 62, [Tool Bar Explanation](#).

Width: percent

Horizontal Alignment:

Padding: (optional empty space around the item)

Pad all sides by pixels

Pad each side individually:

Top: pixels

Left: pixels Right: pixels

Bottom: pixels

Visible To:

Public (non-logged-in users)

All Owners

Committee Only

Show For:

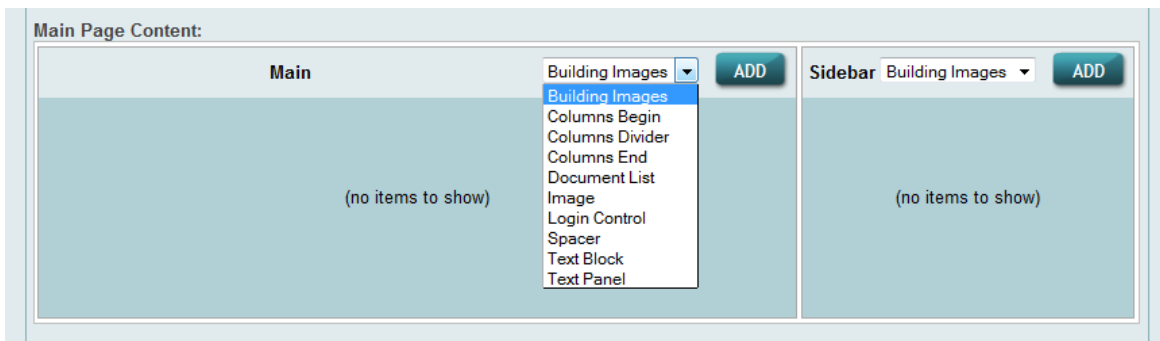
All Buildings

Selected Buildings:

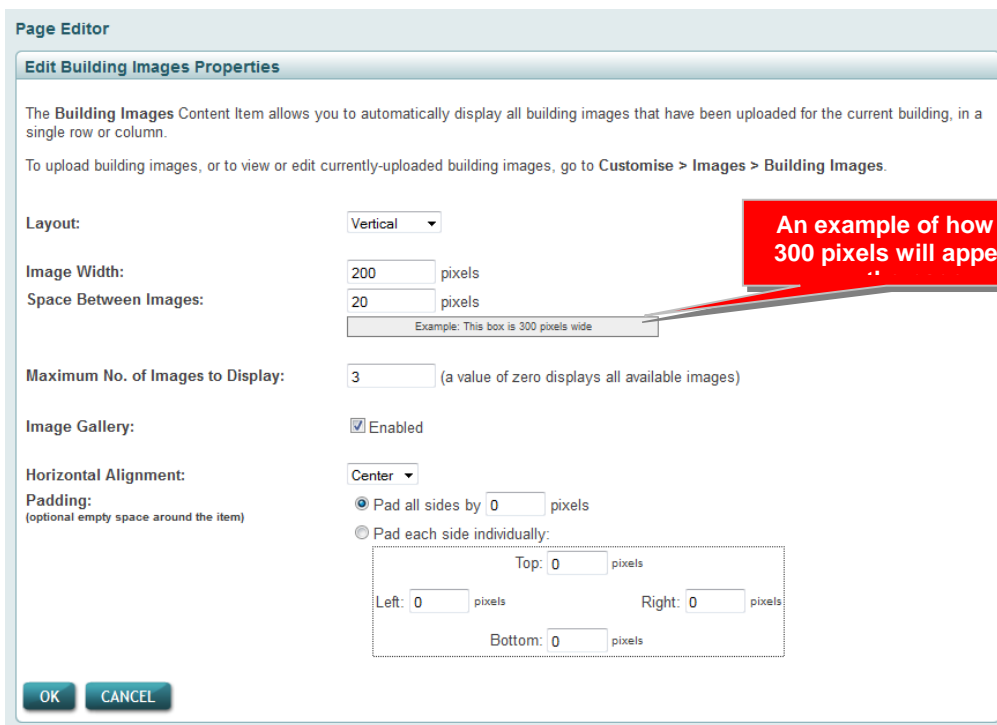
Enter all the properties required and click OK.

Main Page Content – Building Specific Home Page (cont.)

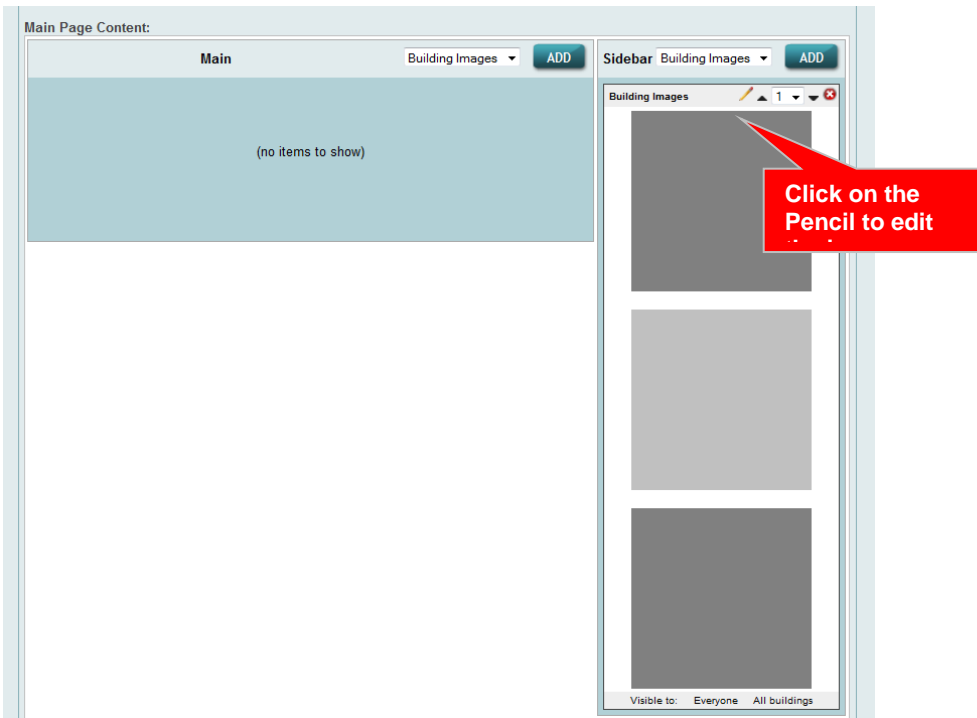
You can now start adding Content Blocks (containers) eg: 'Building Images', Text Block' or Text Panel' etc to the Main or Sidebar depending how you have set your page. Remember that Page Headers & Footers are optional.



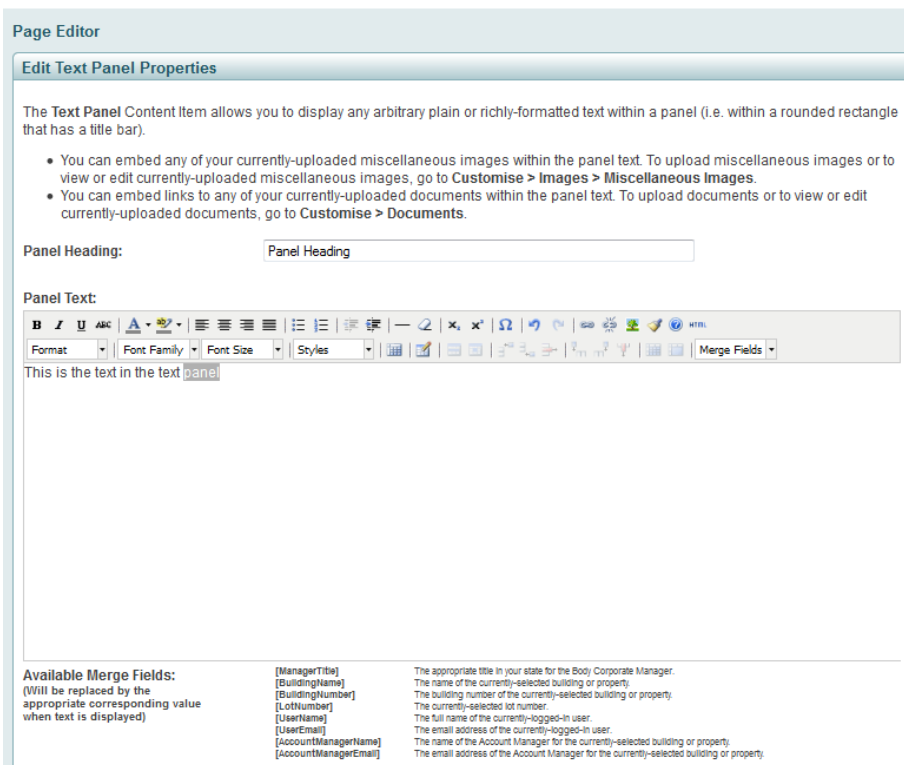
- Click 'Building Images' on the Sidebar and then click 'ADD'



- For the layout of the 'Building Images' you can set them to Vertical or Horizontal, add Spaces Between the Images, Maximum No. of Images to Display, Image Gallery (*owners can click on the images and can scroll through the images if enabled*), Horizontal Alignment and add Padding around the 'Building Images', (*this helps with the alignment of the page*).
- Click OK



14. Click 'Text Panel' on the Sidebar and then click 'ADD'



See page 62, [Tool Bar Explanation](#).

Width: 100 percent

Horizontal Alignment: Center

Padding: (optional empty space around the item)

Pad all sides by 0 pixels

Pad each side individually:

Top: 0 pixels

Left: 0 pixels Right: 0 pixels

Bottom: 0 pixels

Visible To:

Public (non-logged-in users)

All Owners

Committee Only

Show For:

All Buildings

Selected Buildings:

ADD BUILDING(S) REMOVE SELECTED BUILDING(S)

OK CANCEL

Further adjustments can be made by changing the Width, Horizontal Alignment or Pad all sides or each individual side

Make the Text Panel visible to; Public, All Owners or Committee Only

Show the Text Panel to All Buildings or

15. Click OK once you have finished.

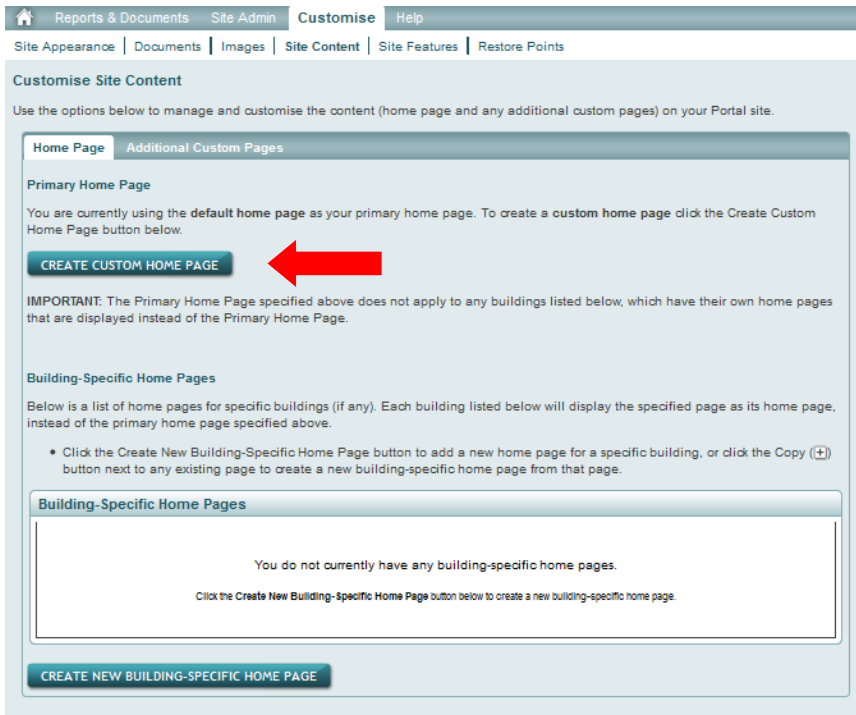
Continue setting up the 'Building Specific Page Home' pages.

Troubleshooting

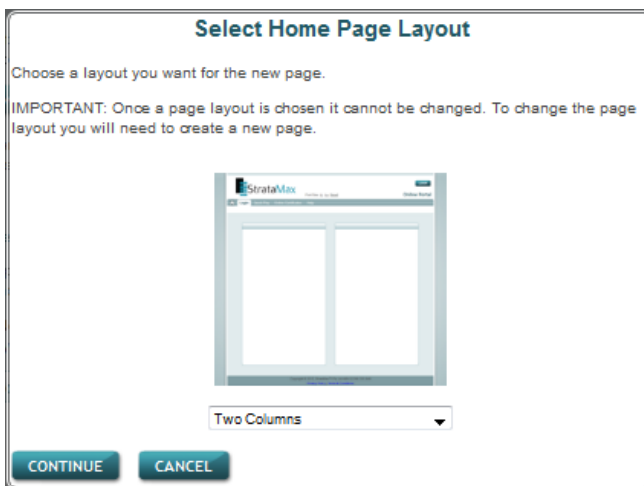
Visitors to a page have advised you that they are unable to view a page, check that you have allowed access to the appropriate people

Create Custom Home Page

The custom home page could be the primary home page or general home page for all or some of the buildings.



1. Click 'Create Custom Home Page'



2. Select the 'Home Page Layout' and click 'CONTINUE'
3. Select to make the general Custom Home Page Public, All Owners or Committee
4. Click on 'Content' and set up using the same steps from [page 39](#)

Additional Custom Pages

Adding custom pages is the same as creating Home Pages. Additional custom pages can be setup with a basic layout (template) and copied numerous times and then you can go back and customise them individually.

Viewing: MAXSOFT PTY LTD CHANGE LOGOUT

Font Size: A- A+ Reset Online Portal

Owner View Access | Reports & Documents | Site Admin | **Customise** | Help

Site Appearance | Documents | Images | **Site Content** | Site Features | Restore Points

Customise Site Content

Use the options below to manage and customise the content (home page and any additional custom pages) on your Portal site.

Home Page | **Additional Custom Pages**

Below is a list of additional custom pages already added to your site (if any).

- Click the Create New Page button to add a new custom page to your site, or click the Copy (+) button next to any existing custom page to create a new page from that page.

Page Name	Type	Active?	Owner?	Committee?	Bldg-Specific?	Options
Concierge	Menu Group	n/a	n/a	n/a	n/a	▼
Package Pickup & Dry Cleaning	Page	Yes	Yes	Yes	No	▲▼ / ✎ + ✖
Facilities	Page	Yes	Yes	Yes	Yes	▲▼ / ✎ + ✖
About ABC Strata	Menu Group	n/a	n/a	n/a	n/a	▲▼
Why ABC?	Page	Yes	Yes	Yes	No	▲▼ / ✎ + ✖
Hiring Now	Page	Yes	Yes	Yes	No	▲▼ / ✎ + ✖
[NONE]	Page	Yes	Yes	Yes	No	▲▼ / ✎ + ✖
Craigs Strata Management	Menu Group	n/a	n/a	n/a	n/a	▲▼
Meet the Team	Page	No	Yes	Yes	No	▲▼ / ✎ + ✖
Agreement Structure	Page	No	Yes	Yes	No	▲▼ / ✎ + ✖
Strata Wiki	Page	Yes	Yes	Yes	No	▲▼ / ✎ + ✖
By-Laws	Page	Yes	Yes	Yes	No	▲▼ / ✎ + ✖
Test Menu	Page	No	Yes	Yes	No	▲▼ / ✎ + ✖
Test Sub Page	Page	Yes	Yes	Yes	No	▲▼ / ✎ + ✖
Home Login	Page	No	Yes	Yes	No	▲▼ / ✎ + ✖
Auditors Report	Page	No	Yes	Yes	No	▲▼ / ✎ + ✖

CREATE NEW PAGE

Click Create New Page, select the page layout

You can quickly see who can view the pages and if Building

Note: Edit any of the Additional Custom Pages click on the Pencil icon

Additional Custom Pages – Cont.

In the screen shot below you can add menu's and page names. The parent menu is the top menu, the page name is a child menu under the parent menu and then you can add a heading on the top of the page from the Content tab, see the screen shot at the bottom of this page.

1. Create a Parent Menu
 - * NEW
 - * Enter Name
 - * OK
2. Or select a Parent Menu name created previously by clicking on the drop down arrow
3. Enter Page Name (*this is a required field but it can be changed or hidden from the 'Content' tab*)
4. Enter the details and click SAVE and then go to the 'Content' tab

5. Complete the customised page on the Content tab

6. Click SAVE or SAVE & CLOSE



Parent Menu - the top menu

Page Name - any subsequent tabs

Heading - you can 'Use Page Name', 'Don't show a heading' or 'Show this text'

If you do not add a Parent Menu the Page Name will then move to Parent Menu position.

The examples below show the Reports & Documents as the **Parent Menu**

Manage | View are **Page Names**

Manage Reports & Documents and View Building Reports & Documents are the **Headings**



Page Editor

PREVIEW SAVE SAVE & CLOSE CANCEL

Properties Content

Heading: (will appear at the top of the page, below the menu) Use Page Name Don't show a heading Show this text: Concierge

Optional Page Header Text: (will appear at the top of the page, below the heading)

Main Page Content:

Content Building Images ADD

Text Block 1

As an Owner at Emporium, we would like to make you feel right at home. One of our most valuable assets, the concierge, is there to help make your day as pleasant as possible. Let us assist you with any bookings or transfers.

Visible to: Everyone All buildings

Columns Begin 2

This Content Item must be followed by (other Content Item(s) and optionally one or more Columns Divider Content Items and then) a Columns End Content Item.

Visible to: Everyone All buildings

Text Panel 13

Tennis Bookings

Tennis courts are available from 7:30AM - 7:30PM at night and are for exclusive resident use only. Bookings can be made through the concierge. Full shower and toilet facilities are available in the club house.

A booking fee of \$20 per hour with a \$20 deposit applies. Bookings must be made the day prior. Private lessons are available through a number of trainers - please contact the concierge for more information.

Palazzo Towers runs a social tournament in May and would like to register any interest by clicking this click.

Visible to: Everyone All buildings

Columns Divider 14

This Content Item must be preceded by a Columns Begin Content Item, and must be followed by (other Content Item(s) and optionally one or more Columns Divider Content Items and then) a Columns End Content Item.

Visible to: Everyone All buildings

Image 15

Visible to: Everyone All buildings

Columns End 16

This Content Item must be preceded by a Columns Begin Content Item followed by other Content Item(s) and optionally one or more Columns Divider Content Items.

Visible to: Everyone All buildings

Optional Page Footer Text: (will appear at the bottom of the page)

Available Merge Fields: (will be replaced by the appropriate corresponding value when text is displayed)

[ManagerTitle]	The appropriate title in your state for the Body Corporate Manager.
[BuildingName]	The name of the currently-selected building or property.
[BuildingNumber]	The building number of the currently-selected building or property.
[LotNumber]	The currently-selected lot number.
[UserName]	The full name of the currently-logged-in user.
[UserEmail]	The email address of the currently-logged-in user.
[AccountManagerName]	The name of the Account Manager for the currently-selected building or property.
[AccountManagerEmail]	The email address of the Account Manager for the currently-selected building or property.

Go to top of page

Click PREVIEW to view your

Click on the cross to delete any of the columns or content containers

Edit the column or list, click on the pencil icon

You can move the contents container up or down to where you want by changing the number to 2 and it will move this box to position 2

Page Preview Mode

Click on the arrow to select the view for a Committee Member

Remember if you have created a page for an individual building you can click on the down arrow and select the building and view the page

The screenshot displays the StrataMax online portal interface. At the top, there is a navigation bar with 'View page as role' set to 'Owner' and 'for building' set to 'STRATAMAX - TEST ONE [20011]'. A 'CLOSE PREVIEW' button is visible in the top right corner. The main content area is titled 'Concierge' and contains three sections: 'Lobby Services', 'Pool Facilities', and 'Tennis Bookings'. Each section includes descriptive text and an image. A red callout box labeled 'Text' points to the right sidebar area of the page.

This is an email link which was added in the Text Panel 'Tennis Bookings'

Check This Out
In Preview mode you can preview the page as the Owner or Committee Member

Edit Custom Home Page

Click 'Edit Custom Home Page' to Continue to make changes to the general custom home page. If you are building a custom home page and owners are currently logging in you can hide the page.

The screenshot shows the 'Customise Site Content' page. At the top, there is a navigation bar with 'Reports & Documents', 'Site Admin', 'Customise', and 'Help'. Below this is a sub-menu with 'Site Appearance', 'Documents', 'Images', 'Site Content' (highlighted with a red box), 'Site Features', and 'Restore Points'. A red callout box points to the 'Restore Points' link with the text 'Create a Restore Point of your Portal'. The main content area is titled 'Customise Site Content' and includes instructions: 'Use the options below to manage and customise the content (home page and any additional custom pages) on your Portal site.' There are two tabs: 'Home Page' (selected) and 'Additional Custom Pages'. Under 'Home Page', there is a section for 'Primary Home Page' with a description and three buttons: 'EDIT CUSTOM HOME PAGE' (pointed to by a red arrow), 'HIDE CUSTOM HOME PAGE', and 'DELETE CUSTOM HOME PAGE'. Below this is an 'IMPORTANT' note. The 'Building-Specific Home Pages' section includes a list of pages with columns for 'Page Name', 'Building(s)', 'Active?', and 'Options'. A table shows one entry with 'Page Name', '(none)', 'Yes', and an edit/delete icon. A red callout box points to the edit icon with the text 'Edit a Building Specific Home'. At the bottom, there is a 'CREATE NEW BUILDING-SPECIFIC HOME PAGE' button.

Copy a Page

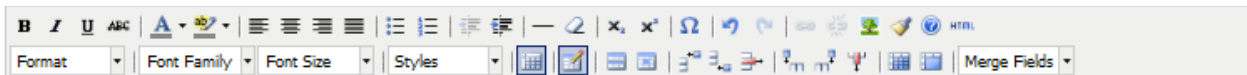
If you have created a page and want to use it as a template custom page you can click on the + (plus sign) to create a copy.

The dialog box is titled 'Copy Page'. It contains the text: 'Are you sure you want to create a new copy of this page?' followed by an 'IMPORTANT' note: 'The new copy of the page will be marked as inactive (not visible). You will need to edit the new page to make it active (visible)'. At the bottom, there are two buttons: 'COPY PAGE' and 'CANCEL'.

Tool Bar Explanations


Across the top:

Bold, Italics, Strike Through Letters, Select Colour of Text, Select Background Colour, Left Align, Centre Align, Right Align, Align Full, Insert/Remove Bullet Points, Insert/Remove Number List, Decrease Indent, Increase Indent, Insert Horizontal Line, Remove Formatting, Subscript, Superscript, Insert Special Characters, Undo, Redo, Insert/Edit Link, Unlink, Insert/Edit Image, Cleanup Messy Code, Help, Edit HTML Source



Across the bottom:

Format, Font Family, Font Size, Styles, Show/Hide Guidelines/Invisible Elements, Insert/Edit Table, Table Row Properties, Table Cell Properties, Insert Row Before, Insert Row After, Delete Row, Insert Column Before, Insert Column After, Delete Column, Split Merged Table Cells, Merge Table Cells, Merge Fields

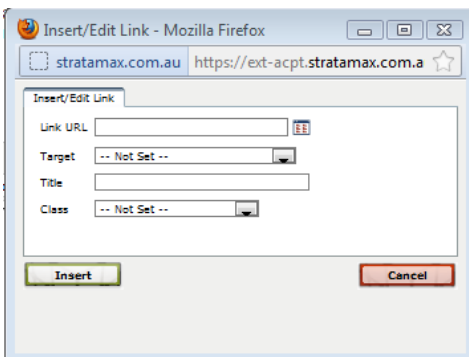
Add a Link, eg: Contact Us, select the word, click on the Link icon  the window below will appear.

Link URL - add the URL link or an email address (*you will be prompted for the prefix & it will add automatically*) or a file from the documents previously uploaded (*see browser window below*)

Target - the URL opens in the same window or a new window

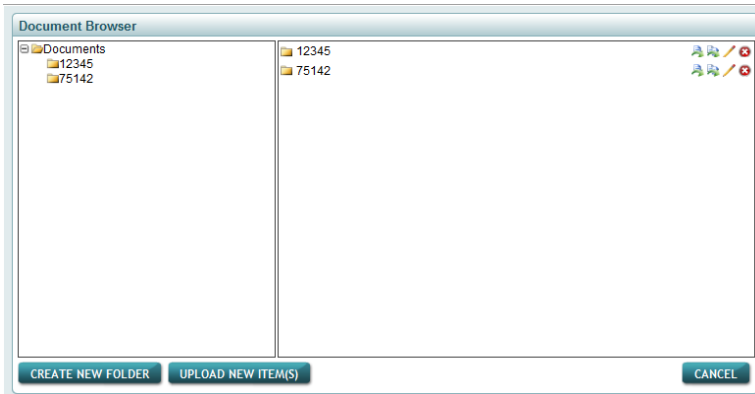
Title - add a title for the link

Class - Normal, Underline Always, Underline on hover only, No underline, Solid border, Solid border (light), Thick solid border, Thick solid border (light), and Dotted border



Once you have completed the fields, click Insert.

Document Browser window below.



Insert an Image, click on the  Insert / Edit Image icon and the window below will appear.

Image URL – click on the box next to the line and the Image Browser will appear and you can select from the pictures that you previously uploaded. (See *browser below*)

Image Description – add a description

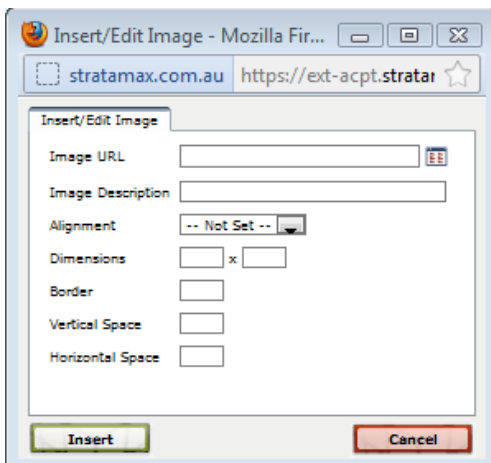
Alignment – Baseline, Top, Middle, Bottom, Text Top, Text Bottom, Left and Right

Dimensions – add the dimensions of the image

Border – add a number for number of pixels

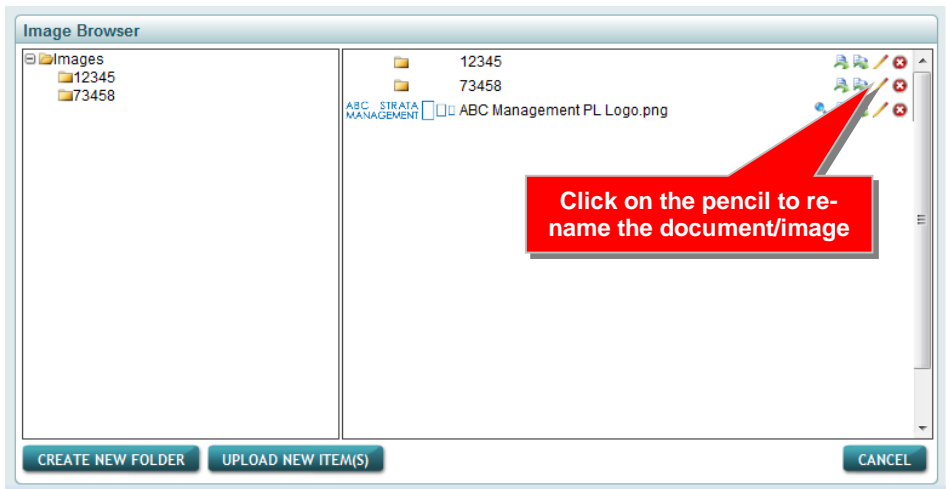
Vertical Space – add a number for number of pixels

Horizontal Space – add a number for number of pixels



Once you have completed, click Insert.

Image Browser window below.



Insert a Table, click Insert / Edit Table icon  and the following window will appear.

Columns – enter the number of columns

Rows – enter the number of rows

Cell Padding – enter the number to pad the cell

Cell Spacing – enter the number to space the cell

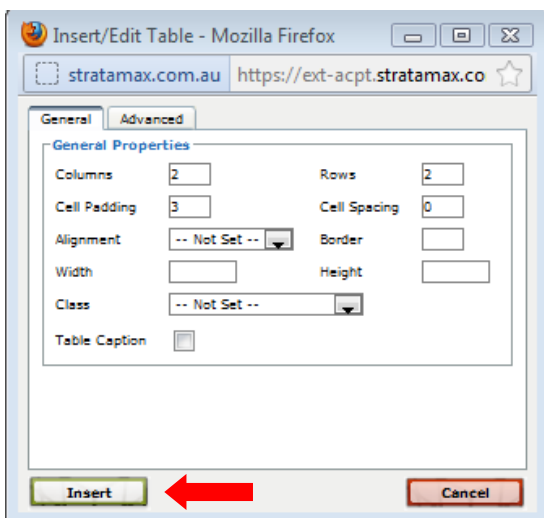
Alignment – Centre, Left and Right

Width – enter a number for the width of the cell

Height – enter a number for the height of the cell


Class – No border, Solid border, Solid border (light), Thick solid border, Thick solid border (light), Dotted border, (value)

Table Caption – add a tick if you would like to add a caption



The Advanced tab includes Advanced Properties for the table and includes Border and Background Colour.

Once you have completed, click Insert.

Hint: Can't see your tables, click on  Show/Hide Guidelines/Invisible Elements icon next to the insert / Edit Table icon