STRATASOFT

Owners Portal — How to Use Guide

A step-by-step guide for owners and committee members new to the StrataSoft portal

It assumes you have successfully logged into Strata Soft. If you're having issues in that regard call 1300 997 905 for help.

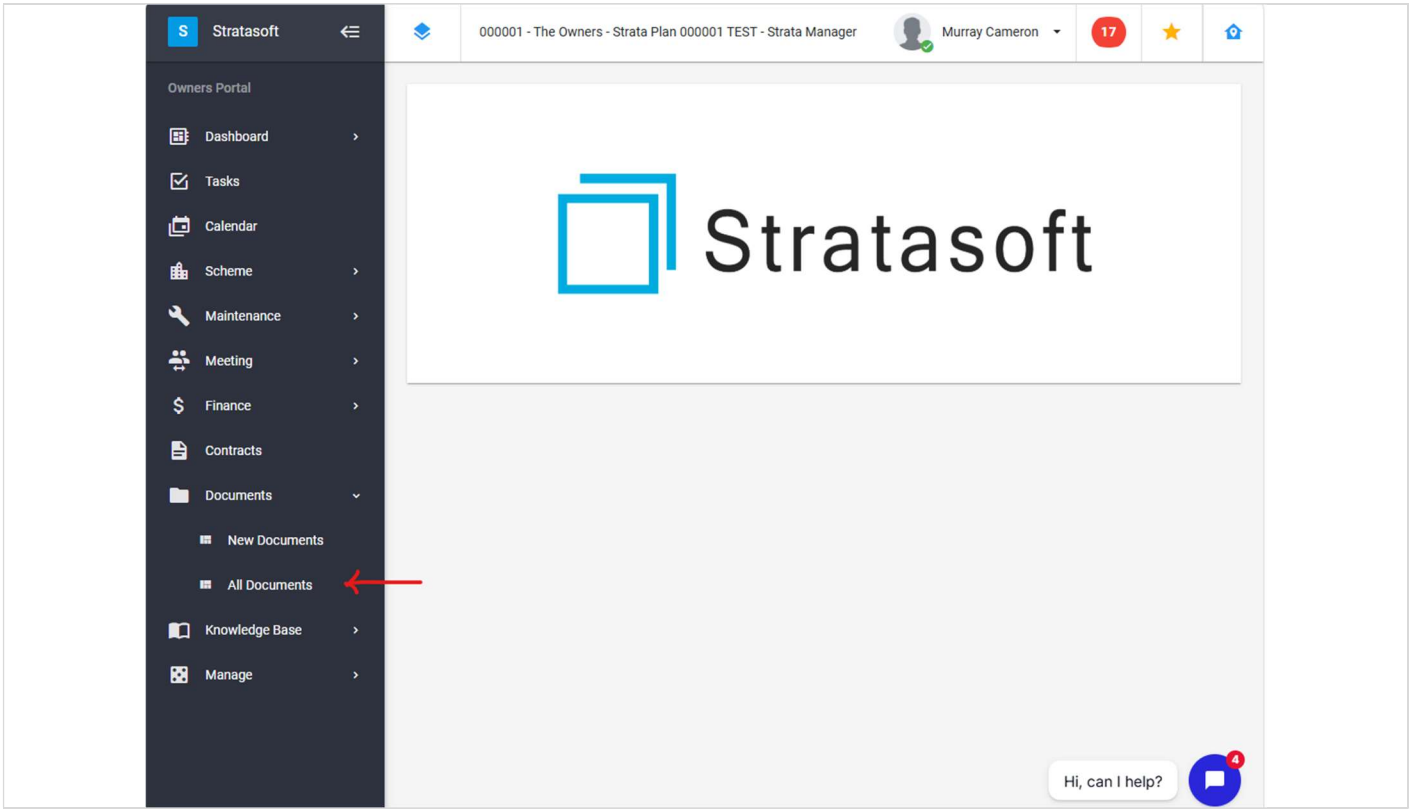
This guide walks you through three of the most useful features in your StrataSoft Owners Portal: finding a document, getting help when you're stuck, and reading your Scheme Dashboard. Each section uses screenshots taken directly from the portal so you can follow along step by step.

Contents: 1. Searching in All Documents | 2. Using the Help chat | 3. Reading the Scheme Dashboard

1. How to Search in All Documents

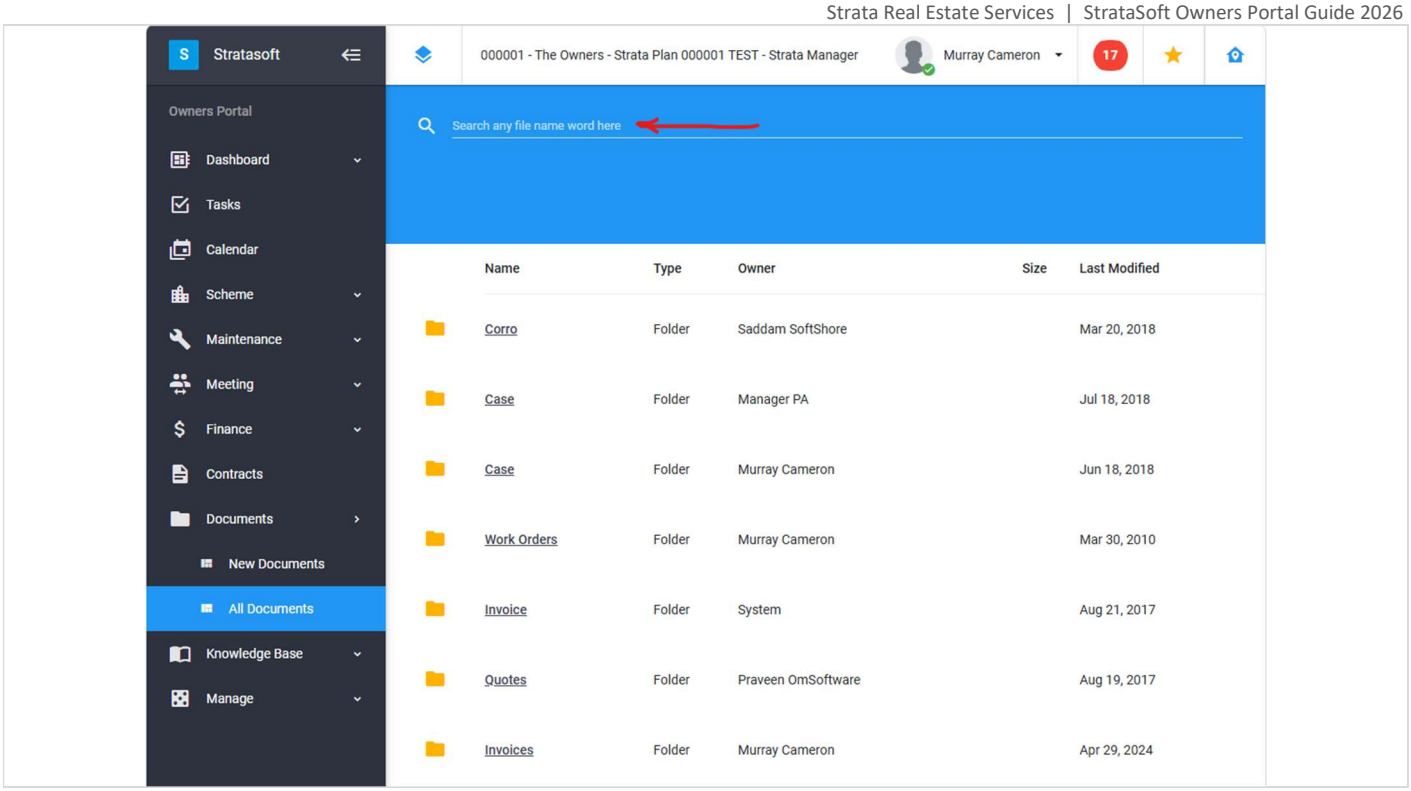
Every document your strata manager uploads for your scheme — minutes, invoices, insurance certificates, by-laws — is stored under Documents. Use the search box to find a file by name in seconds.

Step 1 From the left-hand menu, click Documents to expand it, then click All Documents.



Menu path: Documents → All Documents

Step 2 At the top of the All Documents screen, click into the search bar and type a word from the file name you're looking for (e.g. "insurance" or "AGM minutes").



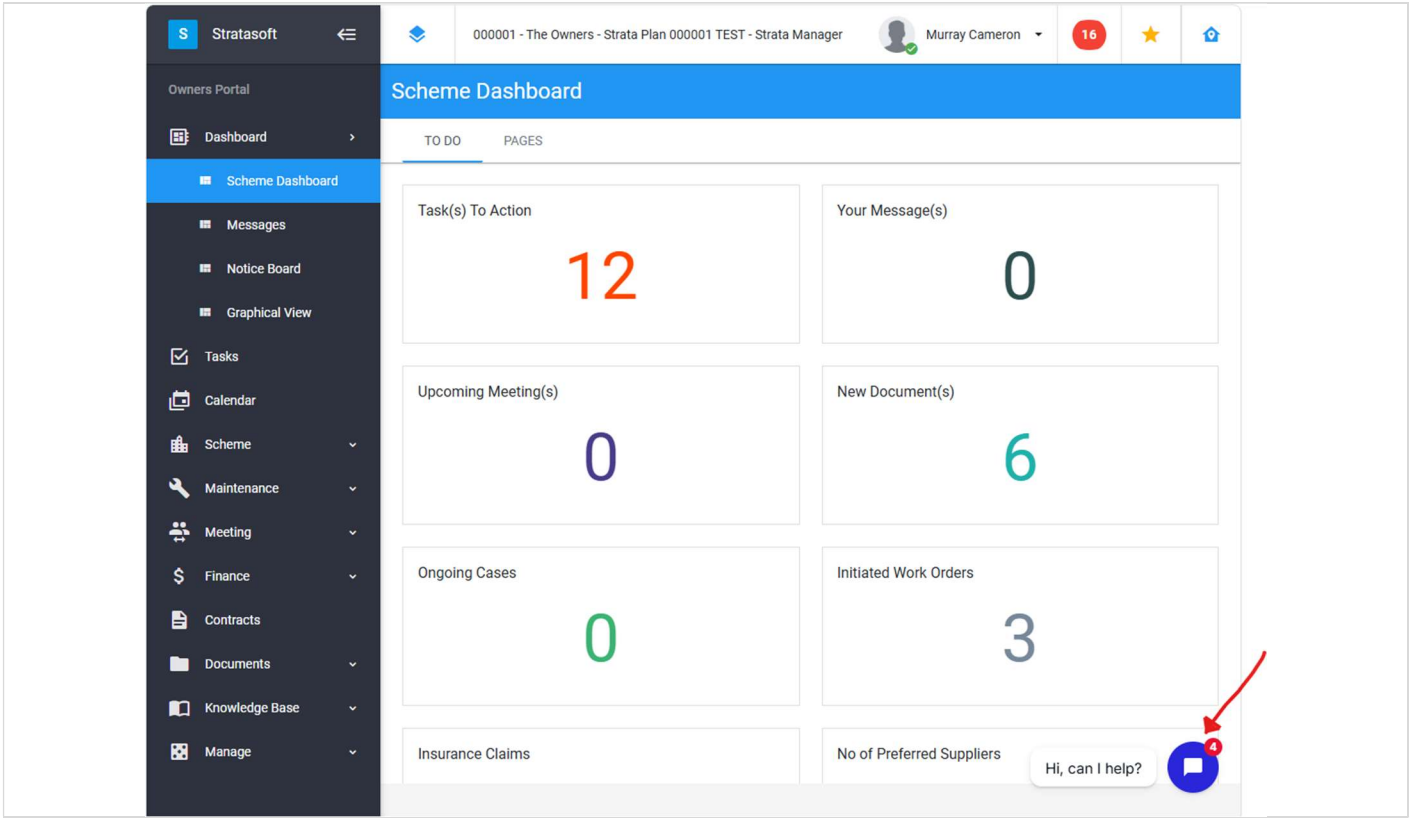
The search bar filters the file list as you type

> ***Tip:*** *You don't need the exact file name — a keyword like the year, the supplier, or the document type is usually enough to bring up the right result.*

2. How to Use Help

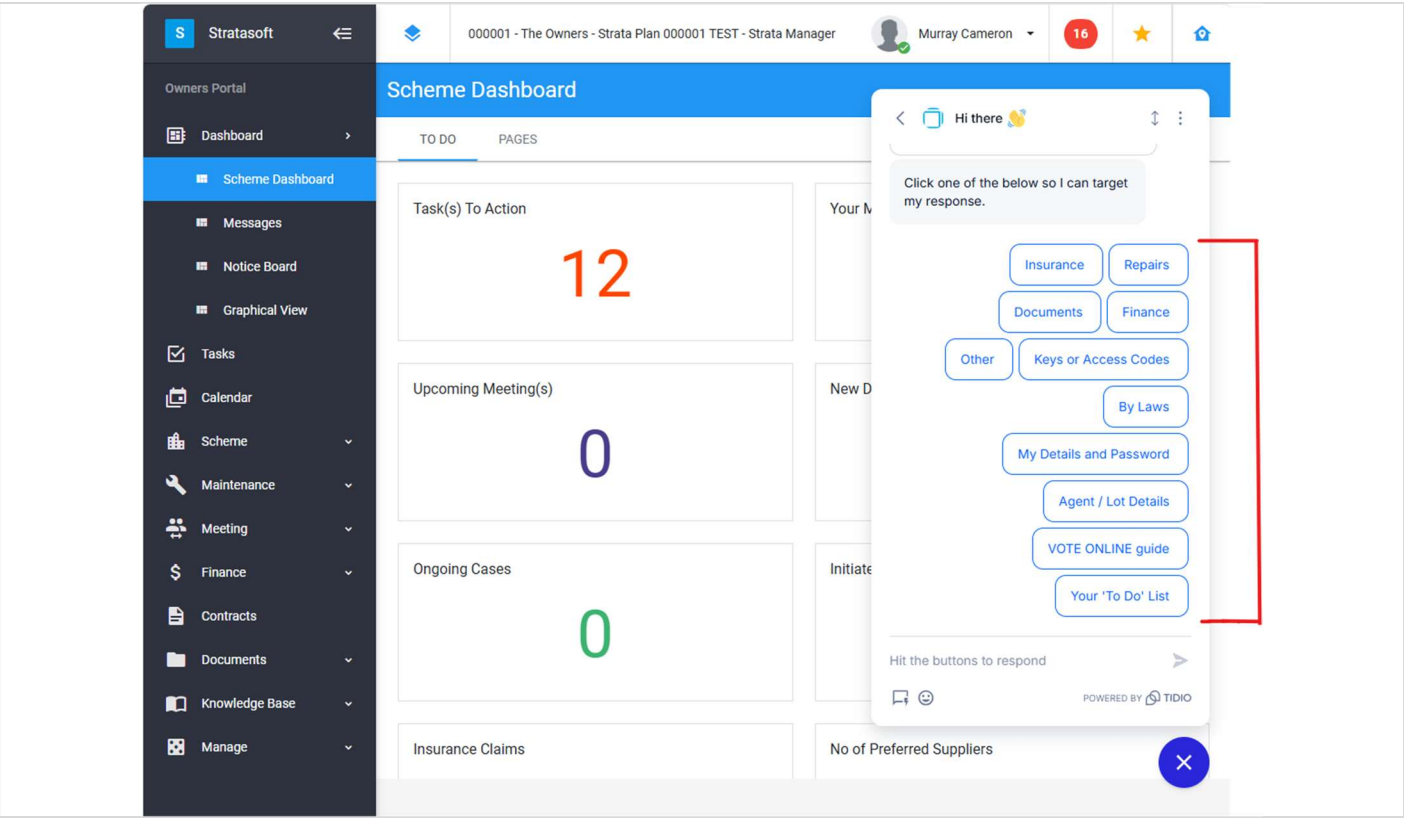
If you're not sure where to find something, the Help chat in the bottom-right corner of every screen can point you in the right direction instantly, without needing to call or email your strata manager.

Step 1 Look for the round blue chat icon in the bottom-right corner of the screen and click it to open the Help assistant.



The Help chat icon sits in the bottom-right corner on every page

Step 2 Choose the topic that matches your question — for example Insurance, Repairs, Documents, Finance, By-Laws or Your 'To Do' List — and the assistant will guide you from there.



Select a topic button to get a targeted answer

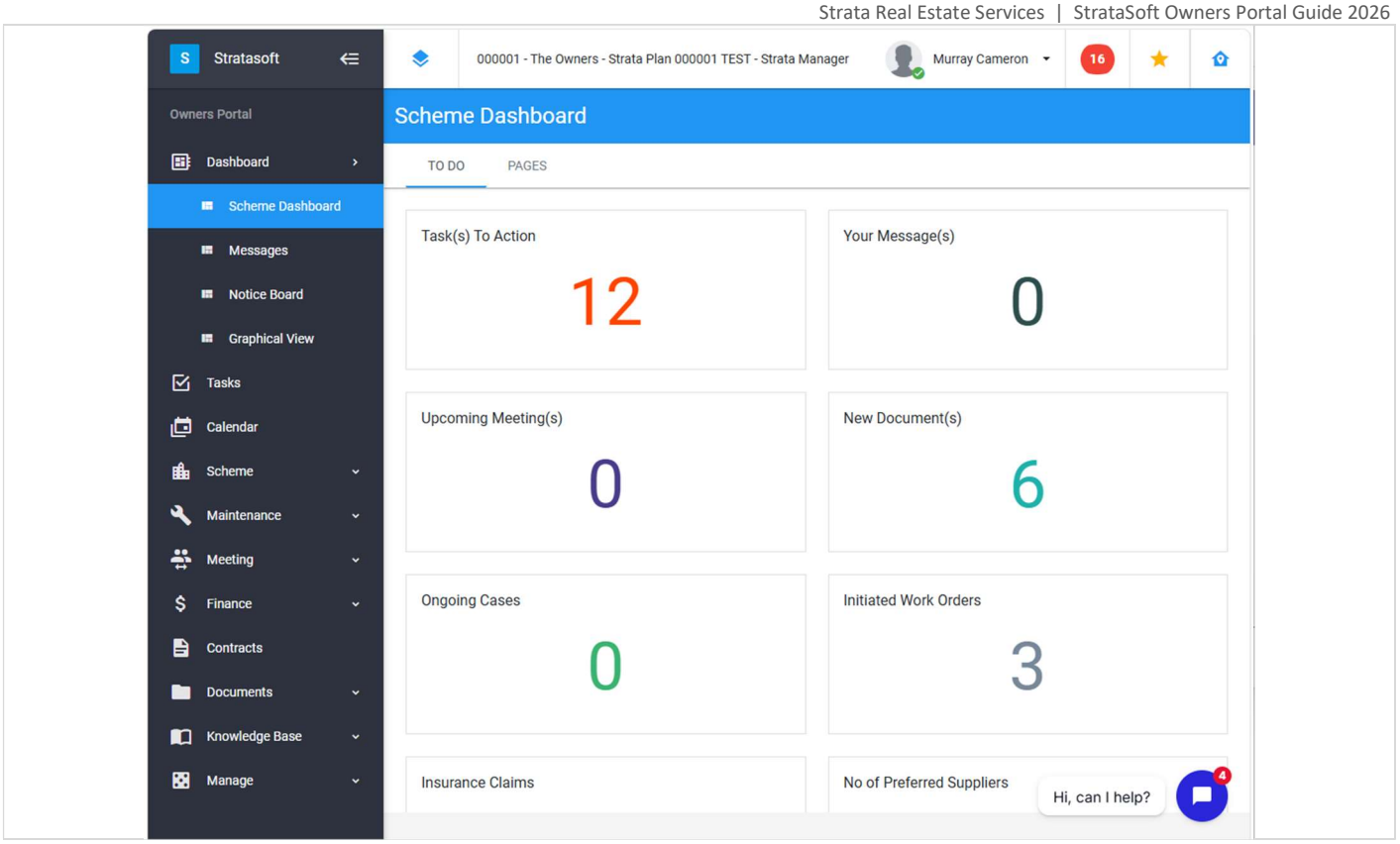
Tip: *If none of the quick topics fit, choose Other and type your question in your own words.*

3. How to Read the Scheme Dashboard

The Scheme Dashboard is your home screen — a snapshot of everything currently happening on your scheme. There are two ways to see this information: the full dashboard page, or the quick Today panel.

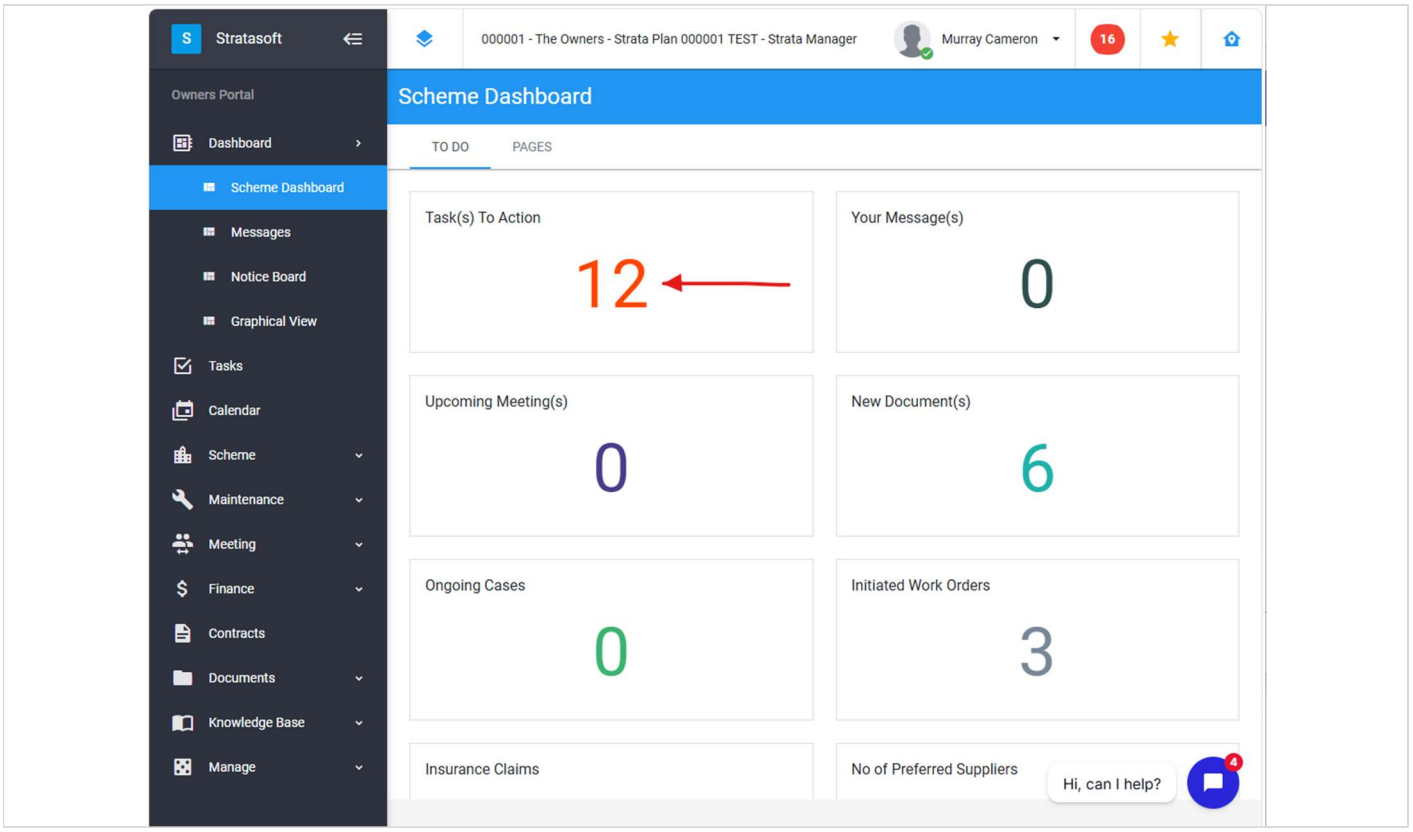
Method A — The full Scheme Dashboard page

Step 1 Click Dashboard in the left-hand menu, then Scheme Dashboard. You'll see tiles for Tasks to Action, Messages, Upcoming Meetings, New Documents, Ongoing Cases and Initiated Work Orders.

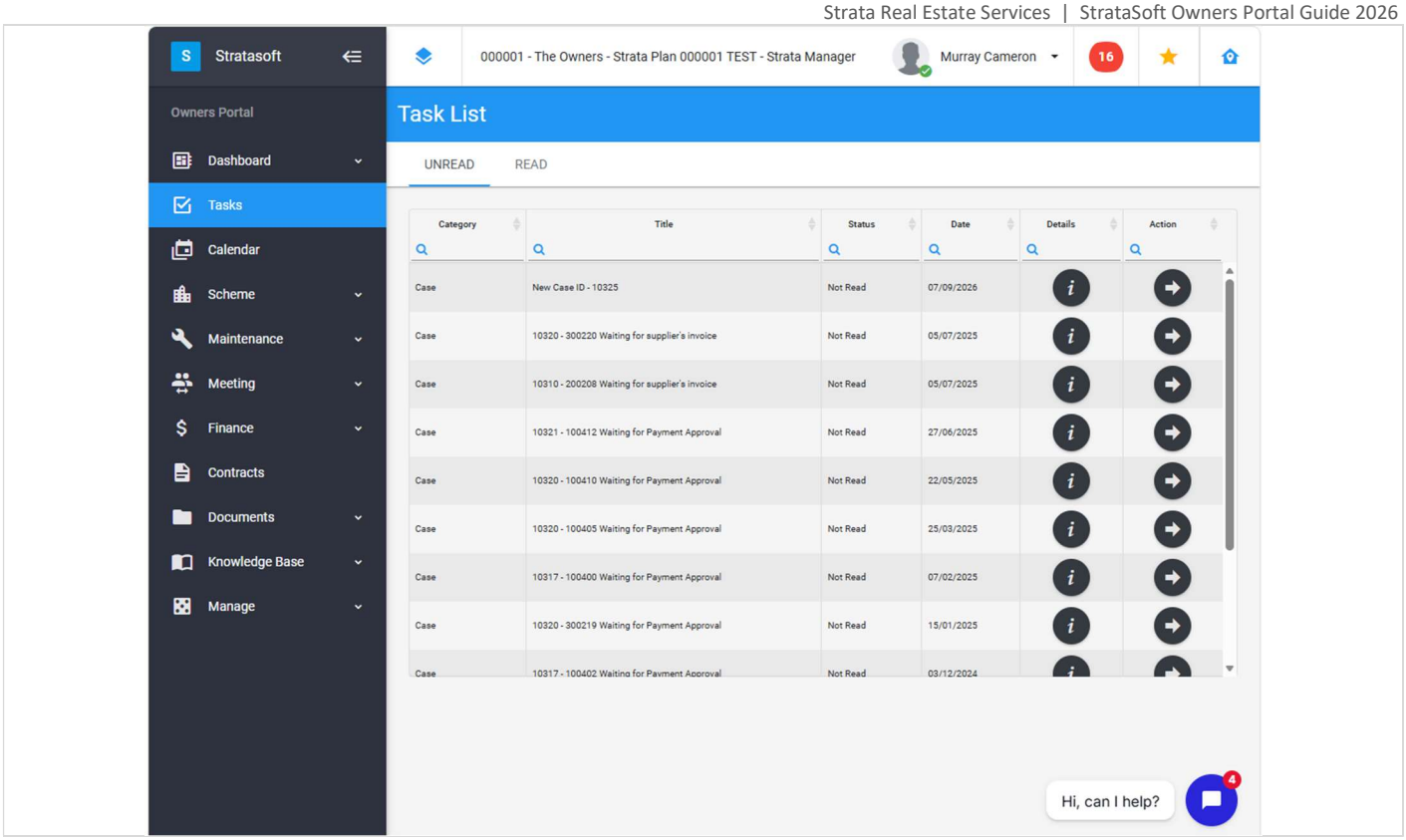


The Scheme Dashboard gives an at-a-glance summary of your scheme

Step 2 Click on any tile — for example the Task(s) to Action number — to open the full list behind that figure.



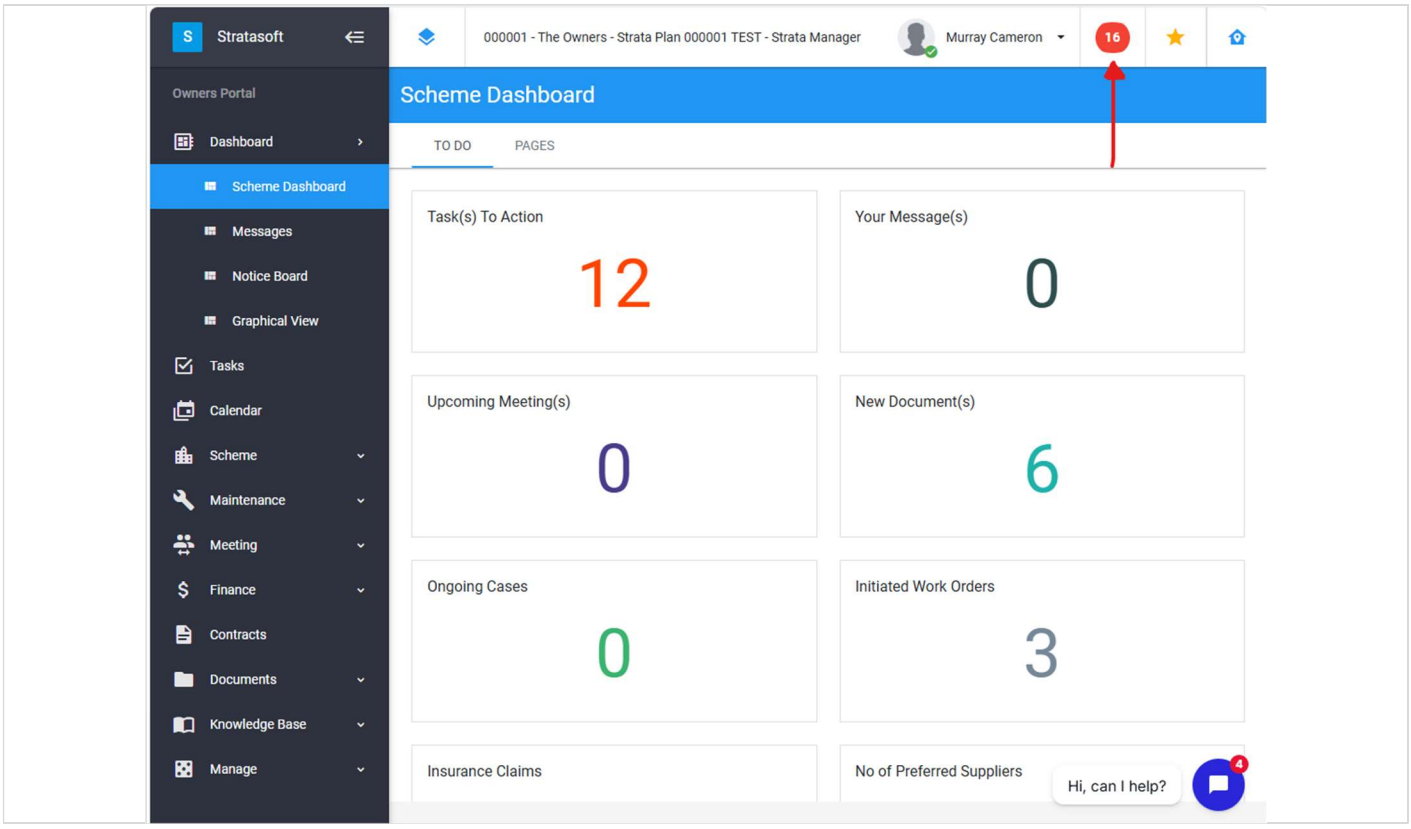
Click a tile's number to drill into the detail



Example: clicking Tasks to Action opens the full Task List, showing each item's category, status and date

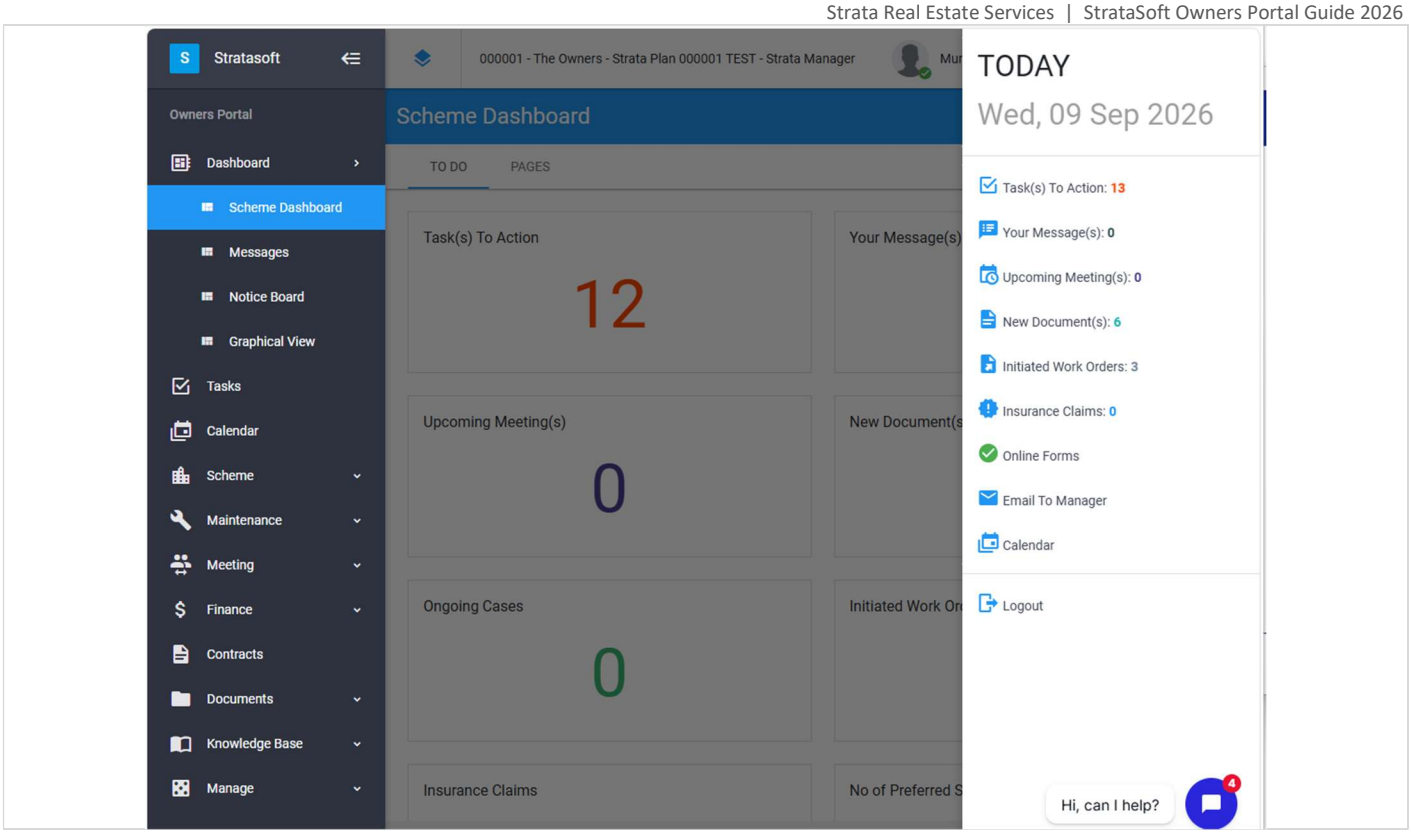
Method B — The quick Today panel

Step 3 From any screen, click the red numbered circle in the top-right corner of the page to open the Today side panel.



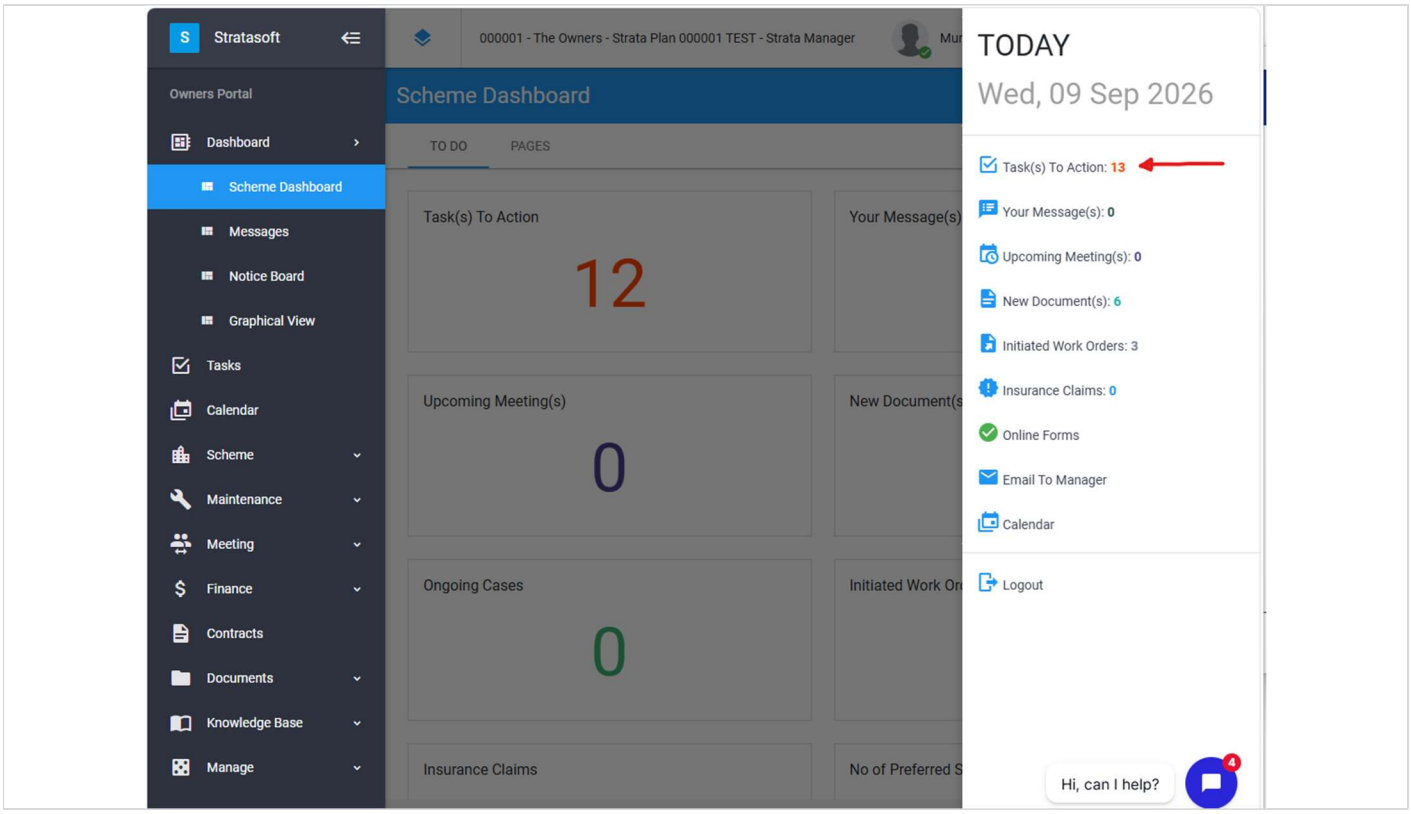
The red badge in the top-right opens the Today panel

Step 4 The Today panel lists the same figures as the dashboard — Tasks to Action, Messages, Meetings, Documents, Work Orders and Insurance Claims — plus quick links for Online Forms, Email to Manager and Calendar.



The Today panel gives the same summary without leaving your current page

Step 5 Click any line item, such as Task(s) to Action, to jump straight to that list.



Click a line in the Today panel to open the full detail

Tip: *Use the Today panel when you're partway through another task and just need a quick check — use the full Scheme Dashboard page when you want to review everything at once.*

Need further help? Contact the friendly team at Strata Real Estate Services, or use the Help chat within the portal at any time.