

## Checklist for Owner Portal Set Up

This article will provide a checklist to guide the process of set up.

For more detailed steps, open this link [Owner and Committee Portals with Strata Communicator | MRI Knowledgebase \(rockend.com\)](#)

1. Install Communicator Services to your Server. This is best done by your IT Specialist.

[Strata Communicator Installation Guide | MRI Knowledgebase \(rockend.com\)](#)

2 In the Communicator Services, configure and customise access to your Owners and committee Portals. This is done on the Server.

3. In customising, have Banners created for your Branding. This can be done by the person/company that created your logo.

4. In customising, this portal service must be activated. Select the Active checkbox against your database and wait for the confirmation message that the change was saved.

5. In Strata Master, in the Corp Screen for each Plan, on the General tab, there is a tick box 'Approved for web access of report(S): Budget & Levy Schedule. Tick if relevant in each Corp screen.

6. In Strata Master, on the same screen as point 5, there is a tick box 'Online Voting Approved'. Tick if relevant on each Corp screen.

7. Go to Configure > Web Access Wizard > Configure Portals. Work through each radio button, determining what access you want to allow to Plans overall and to individual Plans.

8. In this section you will issue usernames and passwords to owners. Only a temporary password is provided to the owners, who will then be able to change the password. Link to instruction - [Issue Owner Portal Log in through Web Access Wizard | MRI Knowledgebase \(rockend.com\)](#)

9. In Meeting Register > tick boxes for 'allow electronic voting' and a box to 'open for online voting'. These will be ticked when creating a meeting if you use Online Voting.

### Useful Links For Set Up and for later reference -

[Setup Documents on the Portals for Strata Master | MRI Knowledgebase \(rockend.com\)](#)

[How to Create your own Customised Portal Brochure | MRI Knowledgebase \(rockend.com\)](#)

[Displaying Images Setup and Use | MRI Knowledgebase \(rockend.com\)](#)

[Owner Unable to Login to Strata Owner Portal | MRI Knowledgebase \(rockend.com\)](#)

[Strata Master Communicator - How To Restart the Services | MRI Knowledgebase \(rockend.com\)](#)

STRATA Master Top Tip #21 - Privacy & Portals | MRI Knowledgebase (rockend.com)

Strata Master Top Tip #81 - Portals Tips - Activity Reports & Budgets | MRI Knowledgebase (rockend.com)

08/10/2021 1:02 pm AEDT