



Adding a Dummy Plan to Test Owner Portals in Strata Master

This article is create simply to provide an option to Strata Managers who wish to be able to check that Owner Portals are accessible and to review how data is being represented.

The provision of this information is for the purposes of -

- ensuring the connection to the Owners Portal is open and active when answering calls from Lot Owners and
- to enable Strata Managers to view the representation of documents and other data on the Owners portals.
- It also assists to guide owners who are having difficulty navigating in the Owner portal.

Your Options

- Adding a Dummy Plan
- Adding an additional debtor to an existing Plan

Adding a Dummy (or fake) plan allows the provision of log in details to the Owner Portal for Strata Management staff for inhouse testing.

Strata Master suggests that all Strata Managers be alert to issues in the use of Dummy Plans, such as -

- the addition of a dummy plan adds to your number of Plans managed, unless it is kept as 'unmanaged' until required.

- using a Dummy Plan to test transactions is risky and is especially **not possible where single trust is in use**, as it will throw the Bank Reconciliation and a number of other reports out of balance. We caution against use for anything except owner portal access..

Creating 'additional debtors' enables Strata Managers to log into the Owner Portal and see the same documents, meetings and plan information as the owners, committee and building managers.

Strata Master suggests that all Strata Managers be alert to issues in additional debtors, such as -

- This does add a Lot to the records (not a registered Lot) and sometimes owners may query this. Your owners should be happy for you to do this and as it assists you to assist them, they may agree.

- additional debtors **cannot** be used to test a financial transaction, as any transactions on this Lot will comprise part of the financials for that Plan.

To Add a Dummy Plan

Firstly, get permission from the Principal of your office.

- Go to the Corp screen and add a Plan, add dummy details to management commenced, association type etc
- Add a bank account in Configure > Bank Accounts, use bank account as something like 1111111 and bsb as 111111 as it is obvious it is the dummy plan.
- Link the bank account to the Plan.
- Add a couple of Lots, usually a normal Lot Owner and a committee member Lot Owner, use names like Donald Duck and Mickey Mouse so it is obvious to users that this is the dummy plan. Enter contact details as those of people in the office eg office emails. This is for testing purposes
- No need to enter any opening balances unless you want to test transactions.
- Then go to configure > web Access wizard and issue log ins for the 2 Lots.

This article link covers setting up a new Plan -<https://kb.rockend.com/help/brief-steps-to-add-a-new-plan-or-owners-corporation>

Adding an additional debtor Lot

Firstly get permission from the Owners Corporation to do so.

Then go to the Plan and add a lot to the Lots tab by clicking edit and create Lots and tick as additional debtor. Add contact details as your email or the general email for the agency.

Adjust total Lots figure, this is a figure that owners will notice on documents and reports, hence why you get permission, or at least let them know the extra Lot allows access to the portal to check that it is functioning as intended from time to time.

You can then grant access to the portal and receive a log in email.

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