Welcome to the new Strata Owner's Portal for Self-Managed Stratas, giving Strata Owners 24-hour access to strata council minutes, month end financials, AGM notices, bylaws, rules, strata plans, contact information, strata resources and more.

This portal is intended to keep Owner up-to-date with the ongoing affairs of your complex, and with its help, we encourage you to get involved and take an active role in the operation of your strata community.

You can request an invitation to join from your Strata Council and it will be emailed to you, or you can register directly at Portal.Stratapress.com/Register. **Choose the 'Owner' registration option and then choose your strata after you have verified your email.**

Thank you.

Simple Strata Solutions, Inc
StrataPress.com
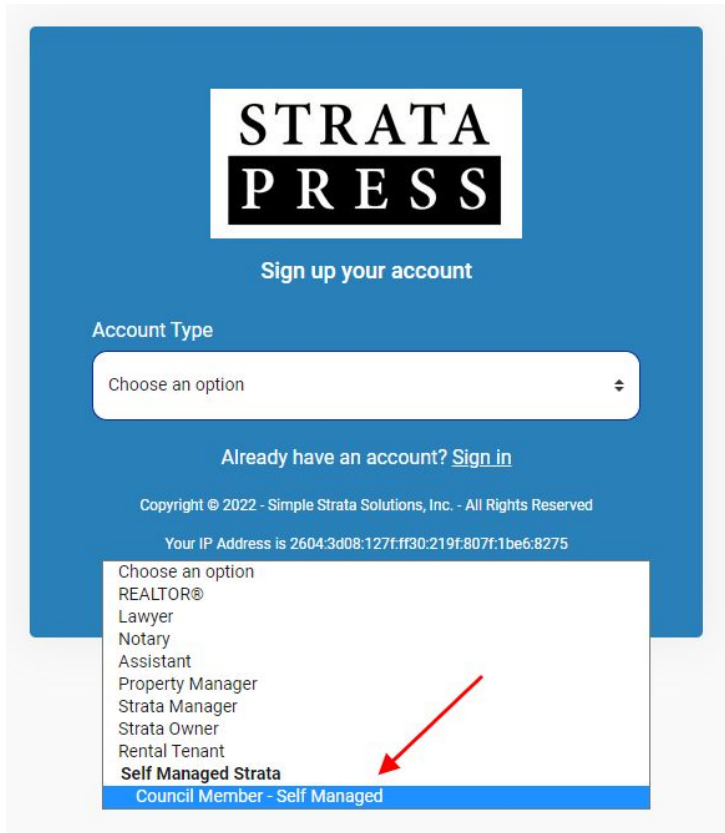info@stratapress.com
250-412-6595

Portal.StrataPress.com

Only ONE person from your Strata Council should register an account on behalf of the Strata Corporation. This option, outlined to the left, will allow us to create an account and setup the portal for your strata. Once the account has been registered and the portal created, other members of your strata can join.

Others can be invited to join through an invitation feature we have in the portal. Strata Owners that are invited will be automatically approved.

Strata Owners will otherwise register themselves using the '**Strata Owner**' option on the registration list. Owners using this method will need to be approved by a Council Member in order to gain access.

Strata Council Members will also register as a Strata Owner and will have the option to indicate they are on council further in the registration process.

Sign up your account

Account Type

Choose an option ⬍

Already have an account? Sign in

Your IP Address is 2604:3d08:127f:ff30:219f:807f:1be6:8275

Choose an option
REALTOR®
Lawyer
Notary
Assistant
Property Manager
Strata Manager
Strata Owner
Rental Tenant
Self Managed Strata
Council Member - Self Managed

The Strata Owner's Portal

The Owner's dashboard has a clean and clutter-free design allowing Strata Owners to easily navigate and find the information they require.

There is little difference between what a Strata Owner sees on their dashboard and what the Strata Council sees. Primarily it is the addition of the **mini-menu** for property settings, and access to the document orders that are the main difference.

≡

STRATA PRESS

≡ **Dashboard**

Susan Goldberg
Profile Settings

- 🌐 Dashboard
- 📁 Documents
- 📋 Orders
- 📄 Updates
- 📑 Discussions
- 📝 Requests

Dashboard for sp2469 - The Metropole

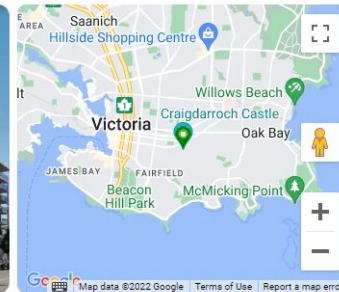### Property Details ≡

+ Add Property

Feedback

Property Name
The Metropole

Strata Plan
sp2469

Strata Lot
455

Address
1050 Joan Crescent
2585
Victoria, British Columbia
V8S-3L5

**This is a Self Managed Strata
Access Level: Council Member**

Strata Documents

These documents are provided for the Owners living at VIS 9999 (Victoria Condo). If you have any questions or comments, please contact your Property Manager.

Strata Documents

Contact Management

Property Manager

StrataPress Property Manager
123 Anywhere Drive, Nanaimo
250-555-5555

The Strata Owner's Portal - Main Navigation

STRATA
PRESS

Dashboard

Documents

Orders

Updates

Discussions

Requests

Reports

Once you login you'll see a number of options on the dashboard. On left side of the dashboard you'll find the main menu bar. Below is a brief description of each section:

'Dashboard' brings you to the main page with access to all information.

'Documents' will take you to the document folders where you can view and download all of the documents your property manager provides.

'Orders' take you to an archive of pending and completed document requests.

'Updates' is an archive of Updates posted by the Property Manager or your Strata Council. Updates are sent to the email address you have in your Profile.

'Discussions' is an archive of messages created by the Property Manager or Council and include select Strata Owners.

'Requests' are messages created by the Strata Owner and sent to the Property Manager and Council. Only you and the management will see your Requests.

'Reports' will contain sales reports and site activity reports. For Council access only.

The Strata Owner's Portal - Property Sections Menu

The primary navigation menu for the **property** is found under the mini-menu on the top right side of the **Property Details** window. Some of these menu items make up the main left side menu bar as well:

**'View Dashboard'** links back to the main dashboard view.

'Edit Property' is where you can edit your property information.

'Management Settings' is where you provide settings for document orders and certificate requests.

'Holiday Calendar' is where you set the days your council is not available to provide completed document requests. Stat holidays are already set.

'Orders' is where you find a list of pending and completed orders.

'Manage Documents' is where you can upload and manage strata documents.
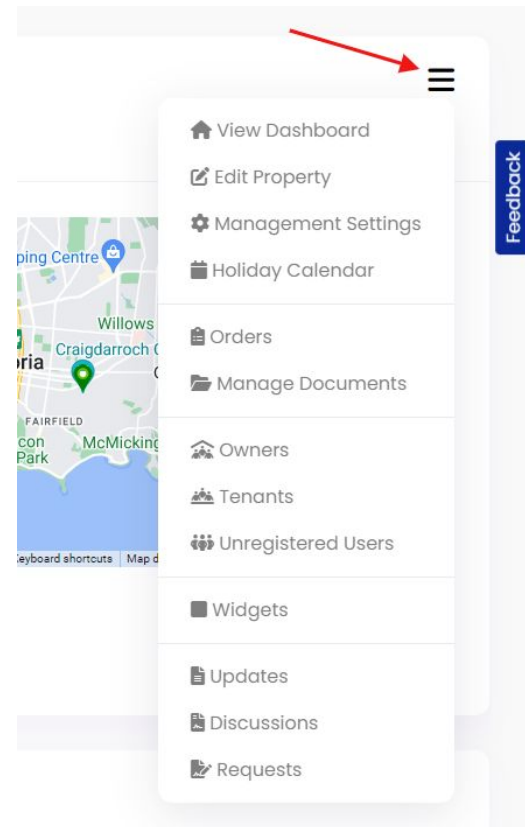
The Strata Owner's Portal - Property Sections Menu

The primary navigation menu for the **property** cont'd…

'Owners' is where you will find a list of your registered Strata Owners.

'Tenants' is where you will find a list of the approved Tenants.
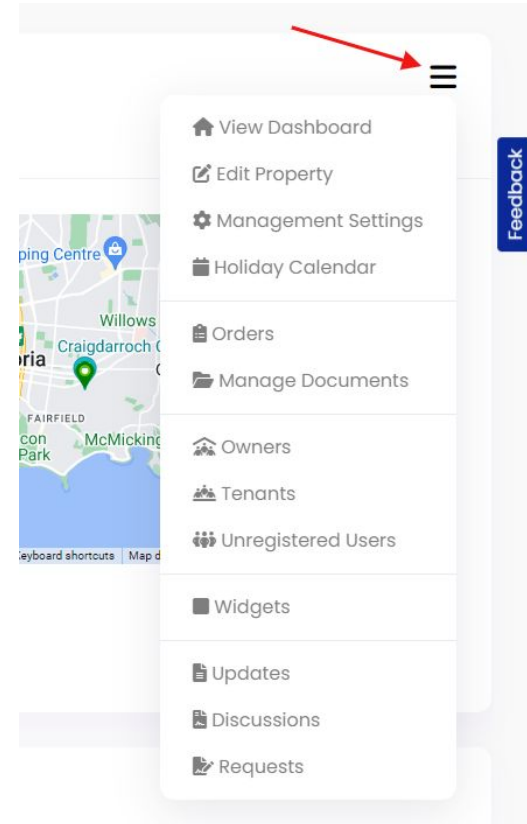
'Unregistered Users' is where you can Invite Strata Owners to register for this property and it is where you will find Strata Owners who have already been invited to registered for the property but not yet registered.

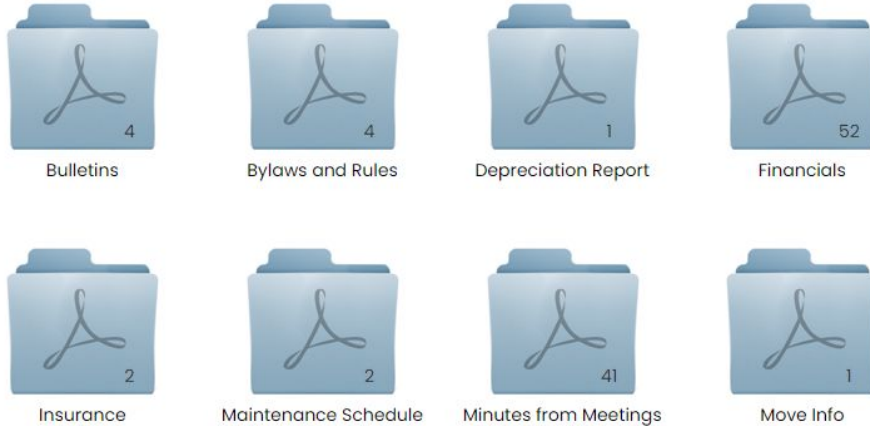**'Widgets'** is where you can manage and edit the widget boxes of information on the main Dashboard.

'Updates' is where you can create and view an archive of Updates.

'Discussions' is where you can create and view an archive of Discussions.

'Requests' is where you can create and view an archive of Requests.

Document Management

Bulletins **4**

Bylaws and Rules **4**

Depreciation Report **1**

Financials **52**

Insurance **2**

Maintenance Schedule **2**

Minutes from Meetings **41**

Move Info **1**

In the **Documents** section you have access to all of your updated strata documents to either view online or download to your computer.

The number on the corner of the folder indicates how many files are in the folder.

Double-click the folder to open it. Double-click the thumbnail image of the file to view the document.
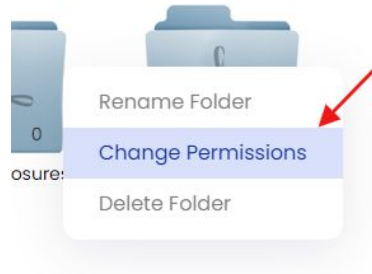
Home / **+**

This blue '+' button found about your folders is used to create a new folder.

Council Members can add as many new folders as required, and then control who can access the information inside with permissions.

Create new Folder

Enter folder name:

Insurance

Cancel   **Create Folder**
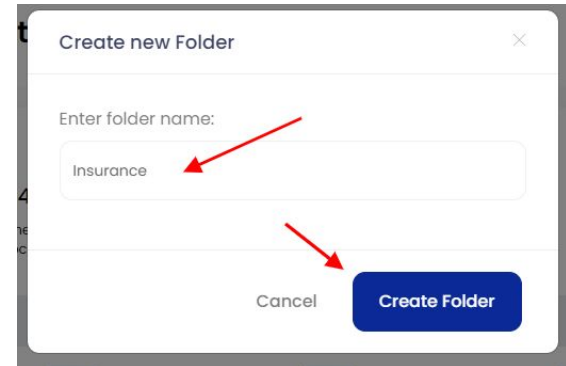
Folder Permissions

Strata Council members can control who can view documents within a folder. To change permissions, **right-click on the folder** and select '**Change Permission**'.

A pop-up window will appear where you choose who you will **DENY** access to.

Any group added to this selection will be denied access, so they will not see the folder or any of the contents once you save the permissions.
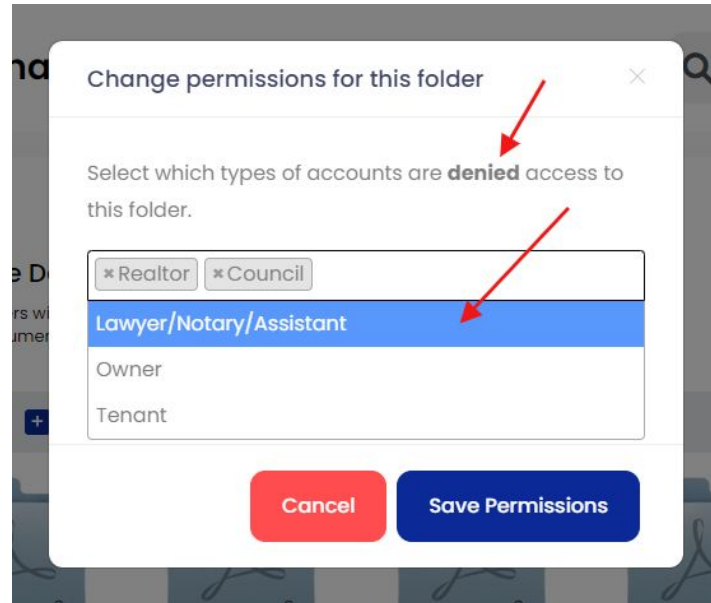
3 Communication Options for Council and Owners

Dashboard

Documents

Orders

Updates

Discussions
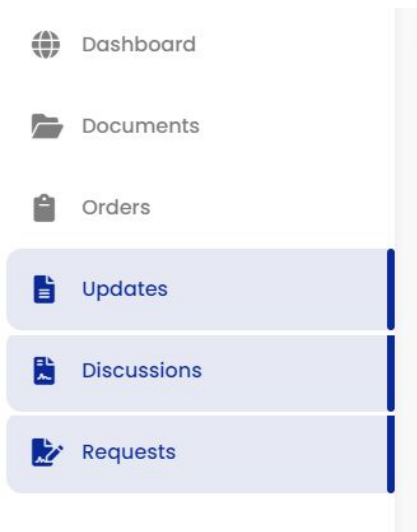
Requests

Updates, Discussions & Requests are the three types of messaging between Owners, the Strata Council and Strata Management. Messages are shared only between authorized, registered users and the management team. Suggestions & concerns get addressed without getting lost and every message is archived for future reference.

UPDATES: Posted by the property manager or the strata council. These are sent to everyone via email and may contain attachments like PDF files, Images files or documents.

DISCUSSIONS: Posted by the property manager or strata council and selected strata owners. You will only see Discussions you are involved in. Discussions, for example, may be sent to a volunteer group doing cleanup around the property. This allows communication between management and those volunteers.

REQUESTS: Posted by Strata Owners and sent to the strata council and property manager. These are confidential communication between management and the Strata Owner.

Updates, Discussions & Requests

STRATA PRESS

Dashboard

Documents

Orders

Updates

Discussions

Requests

UPDATES

If you receive an Update from the Property Manager or Strata Council, the entire message will be contained within the email message. A Strata Owner would only need to visit the portal dashboard if they wanted to comment on an Update, if the comments are enabled. Comments can be enabled or disabled at any time.

All comments are visible to all other Owners.

If there is a Section within a strata, it's possible to post Updates only for the registered Owners within that section. Strata Users need to be assigned to a Section in order to receive Updates for a Section. How to post an Update for a Section.

You can add attachments to an Update and that will be sent directly to the Strata Owner.

The MAX total file size for any Update is 5 MB. We limit this because some email programs will just reject messages with attachments totalling more than 5 MB.

Create an Update
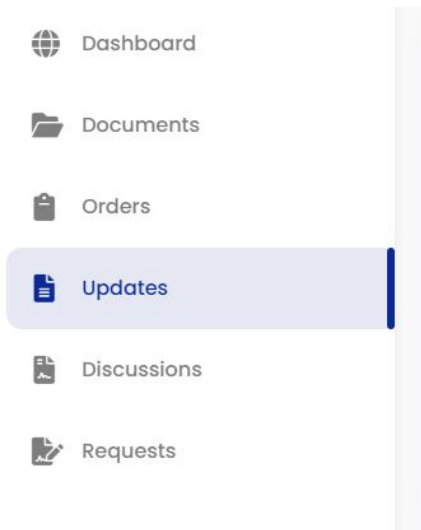
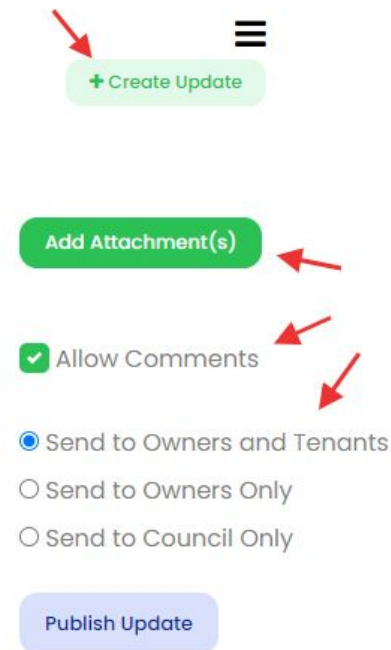Council Members can post Updates. Council can choose the audience for an Update.

From the main menu bar select **'Updates'**.

On the '**Create An Update**' page you'll find that posting an Update is similar to sending an email. Provide a **subject line** and a **message**, and attach any documents you want to send.

Click on the green '**+ Create Update**' button.

Choose whether or not to allow **comments**, select the recipients, add any attachments (up to 5MB max) and then click the blue '**Publish Updates**' button.

This Update is published on the Dashboard and sent to all Strata Owners as an email, complete with the attachments.

Dashboard

Documents

Orders

Updates

Discussions

Requests

≡

+ Create Update

Add Attachment(s)

☑ Allow Comments

● Send to Owners and Tenants
○ Send to Owners Only
○ Send to Council Only

Publish Update

Updates, Discussions & Requests

- Dashboard
- Documents
- Orders
- Updates
- **Discussions**
- Requests

DISCUSSIONS

If you receive a Discussion message from the Property Manager or Strata Council, the entire message will be contained within the email message. You can click the link provided in the email to reply and comment, if required, and participate in the Discussion.

Discussions are shared between the Property Manager, the Council and anyone else invited to participate in the Discussion. You can see who else is added to the Discussion and **all comments are visible to everyone who has been added.**

At the bottom of each Discussion thread, there is an option to unsubscribe from further notifications.

Create a Discussion

Create a Discussion if you want to discuss a topic between Council Members and select Strata Owners. Including any Strata Owner in a Discussion is an option, if they are involved in the topic at hand.

Click on **Discussions** on the main sidebar menu.

On the Discussions page, click on the green '**+ Create Discussion'** button.

+ Create Discussion

Add a **Subject** to the Discussion, provide the **Message**, add any attachments you want to send, add Strata Owners to be included (optional) and then click the '**Publish Discussion'**. Your message is sent to the Council and the selected Strata Owners.

You can choose '**Requires No Further Discussion**' if you are just posting information and not looking for any feedback or comments.

Dashboard

Documents

Orders

Updates

Discussions

Requests

Updates, Discussions & Requests

- Dashboard
- Documents
- Orders
- Updates
- Discussions
- **Requests**

REQUESTS

Requests are created by Strata Owners and are sent to all council members.

If you receive a Request message from a Strata Owner, the entire message will be contained within the email message. You can click the link provided in the email to reply and comment, if required, and participate in the Request.

Requests may be sent when a Strata Owner wants to inquire about a strata issue, report a problem on the property or file a complaint. Every request is confidential and can only be viewed by the strata council and the person who submitted the request.

Images and attachments up to a total of 5MB can be sent with a Request. Attachment file types can be PNG, JPG, PDF, DOC, DOCX or XLS.

At the bottom of each Request thread, there is an option to unsubscribe from further notifications.

Create a Request

Requests are created by Strata Owners to communicate with the Council.

Dashboard

Documents

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Discussions

Requests

Sending a Request is really no different than sending an email. Send a Request if you want to ask a question, report a problem or file a complaint and have it documented.

Click on '**Requests**' on the main sidebar menu.

On the Requests page, click on the green '**Create Request**' button.

+ Create Request

Add a **Subject** to the Request, provide the **Message**, add any attachments you want to send and then click the '**Publish Request**' button. Your message is sent to the Council and the Property Manager.

Requests are only between the Strata Owner who creates it and the Strata Council. No one else can view these unless they have Council level access.
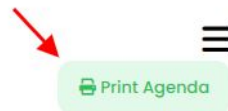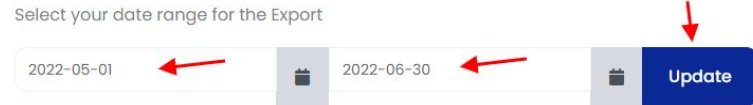
Correspondence Print Out For Council Meetings

STRATA PRESS
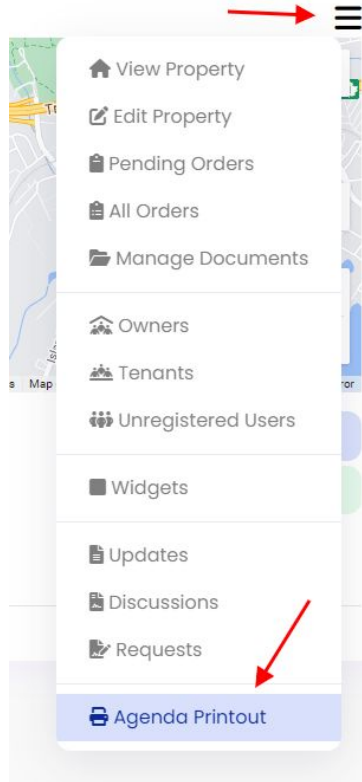
How to create a Correspondence Printout:

The Correspondence Printout will create an itemized list of all **Discussion** and **Request** communication received through the portal between two dates.

Access the **Correspondence Printout** link from the mini-menu associated with your property.

Once in the Agenda section, **choose the date range for the agenda**. This would likely be from the day after your last meeting, until the day of your next meeting.

Then click **Update**.

Select your date range for the Export

2022-05-01   2022-06-30   **Update**

Once the page loads, click the '**Print Agenda**' button found at the top right corner of the page.

Print Agenda

View Property
Edit Property
Pending Orders
All Orders
Manage Documents

Owners
Tenants
Unregistered Users

Widgets

Updates
Discussions
Requests

Agenda Printout

Request a Form B Certificate

The "**Form B: Information Certificate**" discloses a variety of information about a strata lot and the Strata Corporation. Typically it is requested when someone is considering buying a strata lot or involved in refinancing or obtaining a line of credit with a bank.

You can request a Form B from the Property Manager through the dashboard.

Look for the widget on the dashboard has a blue button that says '**Request Form B**'.
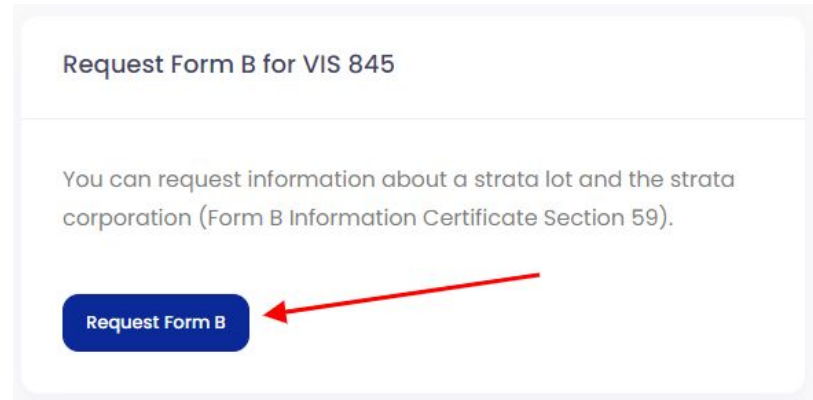
Request a Form B Certificate

Once you fill out the information required to request a Form B, click submit, a second widget will appear on the dashboard with your order details.

The Form B is delivered in 5 business days from when the order is placed. The due date and time is calculated on the request in red text.

If you need it sooner than 5 days, click the '**Add Rush**' button on the Form B widget and select the rush request (24hrs, 48hrs or 72hrs) from the drop-down menu.

The new due time will be recalculated and the rush fee will be added to the order.

Order Information
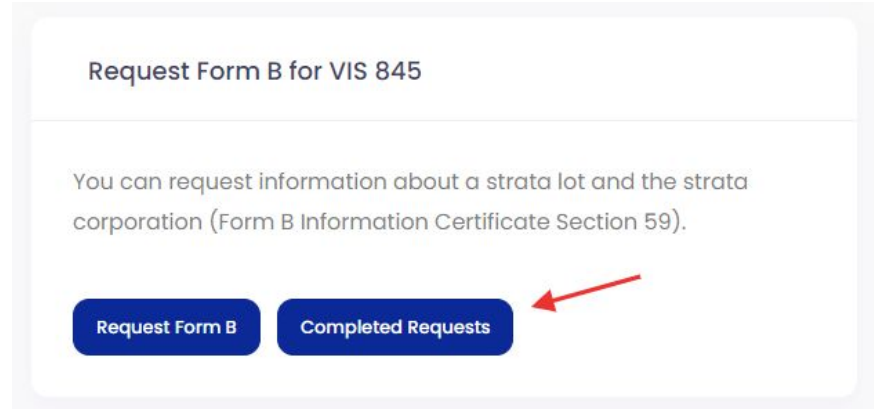
#	Description	Price
1.	Form B - Lot # 141	$35.00

Total: $35.00
Processing Fee: $10.98
Tax (GST): $2.30
Total Cost: $48.28
Due Date: Thu Apr 14, 2022 05:00 pm

Submit Order

Request a Form B Certificate

You will be notified via email when the Form B certificate is available to download. A link will be provided in the email that will take you to the order details. From the dashboard, click the 'Completed Requests' button found on the From B widget.

From the list of orders, click the order number to view the details of the order.
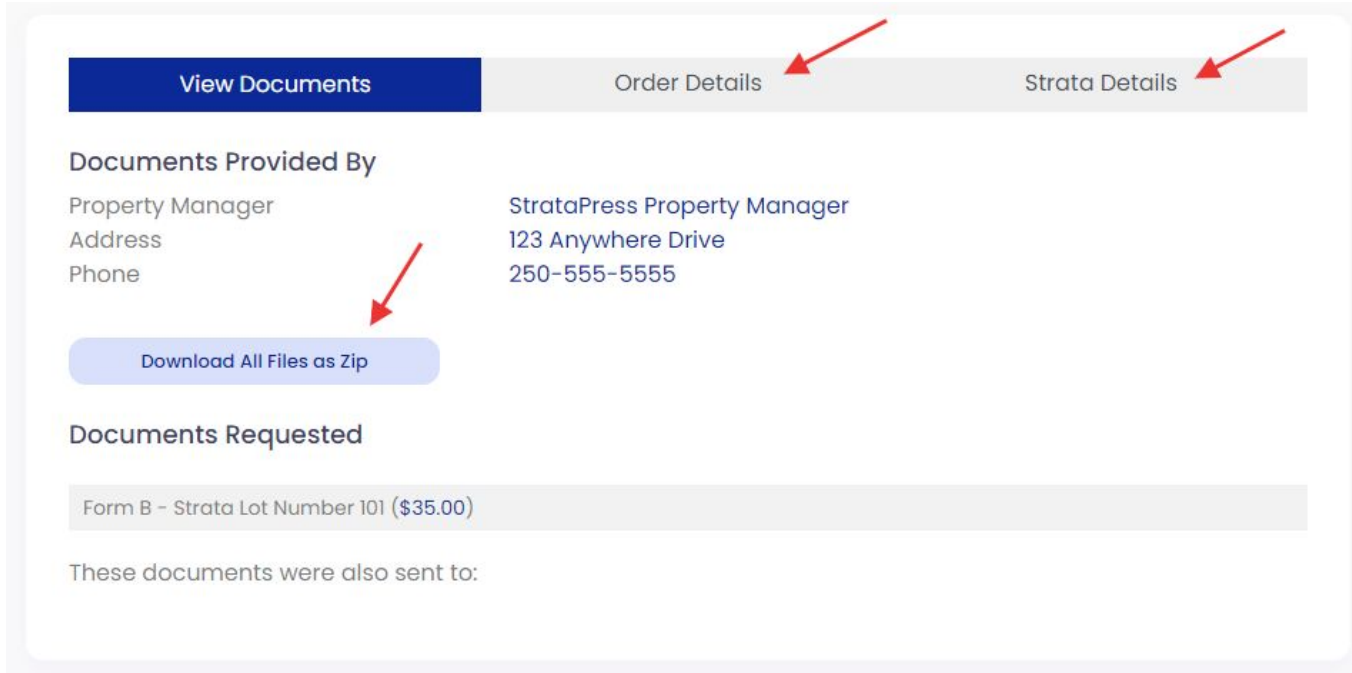
Request Form B for VIS 845

You can request information about a strata lot and the strata corporation (Form B Information Certificate Section 59).

[Request Form B] [Completed Requests]

#	Strata	Cost	Status	Due
View Order #7811	VIS 99999	$48.28	Paid	Mar 9, 2022 – 03:43 pm
View Order #7810	VIS 99999	$48.28	Paid	Mar 9, 2022 – 02:02 pm

Request a Form B Certificate

The order details section provides a link to download the Form B certificate, with access to all of the order details by using the 'Order Details' and 'Strata Details' tabs. A Payment Receipt (PDF) is available under 'Order Details' if needed.

View Documents | Order Details | Strata Details

Documents Provided By

Property Manager — StrataPress Property Manager
Address — 123 Anywhere Drive
Phone — 250-555-5555

Download All Files as Zip

Documents Requested

Form B – Strata Lot Number 101 ($35.00)

These documents were also sent to:

Tenants *

If, as a Strata Owner, you rent your unit to a Tenant, you can submit their email contact information to the property manager so they can be included on any posted Updates.
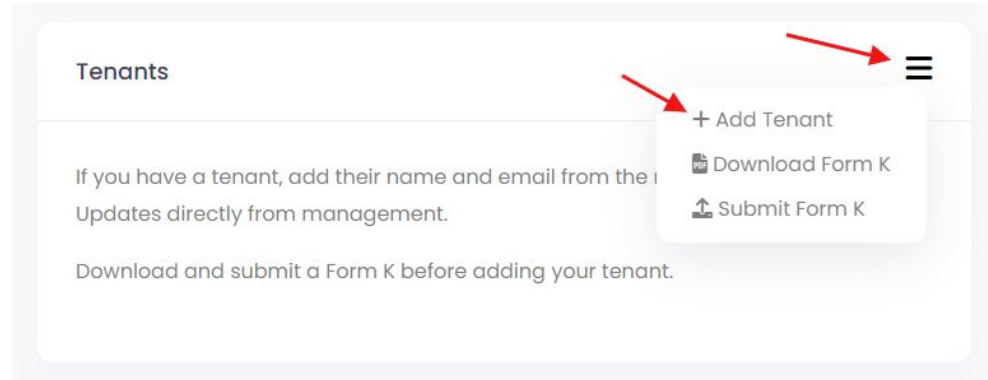
The property manager will need to approve the addition of the Tenant to your account.

You can remove a Tenant from your account anytime and they will stop receiving Updates.

Look for the Tenants widget on the dashboard.

You can also download a Form K (Notice of Tenant's Responsibilities) and submit it on the dashboard.

* Not all properties will have this option. It is only available on properties that allow rentals.

Tenants ☰

+ Add Tenant
📄 Download Form K
⬆ Submit Form K

If you have a tenant, add their name and email from the Updates directly from management.

Download and submit a Form K before adding your tenant.

If your strata does not allow rentals, go to the 'Edit Property' section and UNCHECK the '**Allow Rentals**' option under the '**Additional Options**' tab, and then click 'Save Changes'. This will hide the Tenants widget and remove the option from Owner's settings.
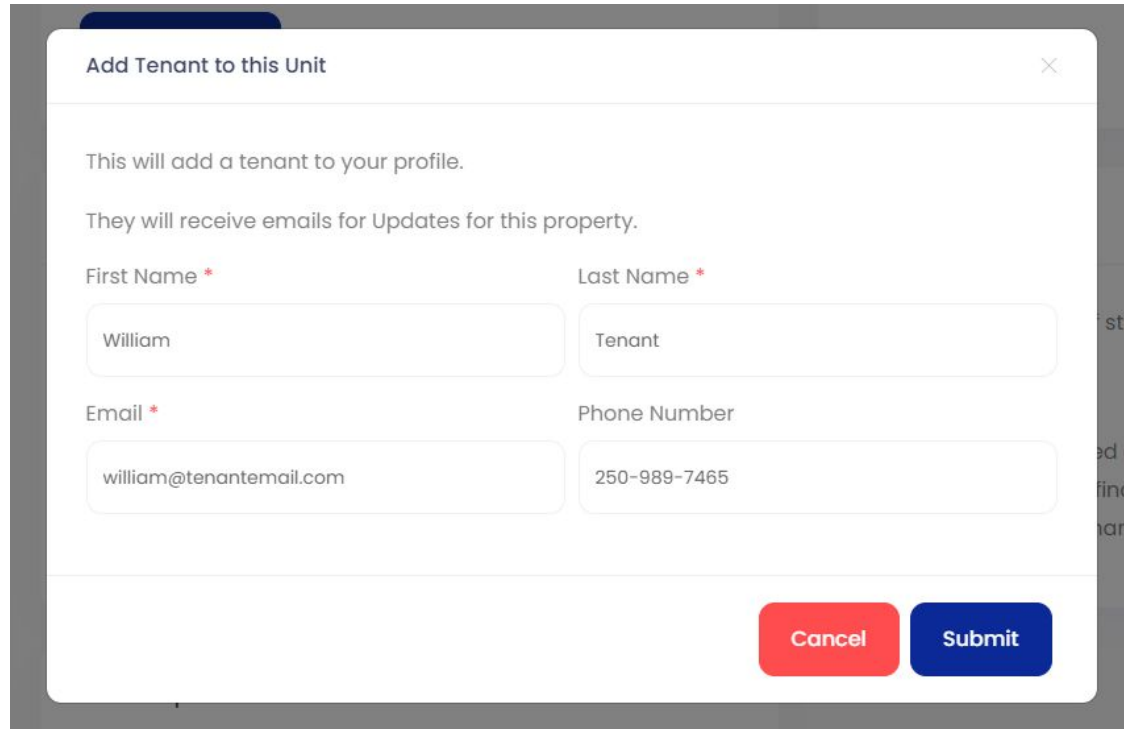
☐ Allow Rentals ⓘ

Tenants

Clicking the blue '**Add Tenant**' button will open a window to submit the Tenant's Name, Email address and Phone number.

Click '**Submit**' when done and the property manager will be notified for approval.

You will receive an email notification once approval has been made.

Add Tenant to this Unit

This will add a tenant to your profile.

They will receive emails for Updates for this property.

First Name *

William

Last Name *

Tenant

Email *

william@tenantemail.com

Phone Number

250-989-7465

Cancel   Submit

Updating Profile Information
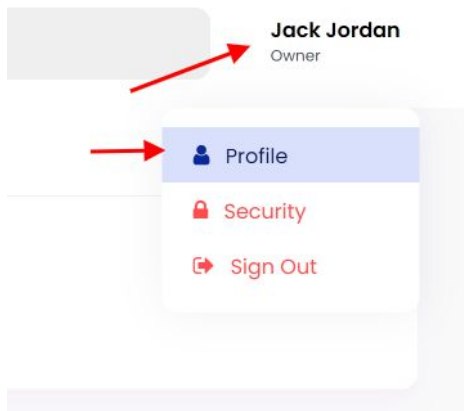
To update profile information for your account, click on your name at the **top right corner** of the dashboard and choose '**Profile**'.

Under the Profile settings you can:

- Update your email address
- Update your phone number
- Add a spouse's name to the account

Adding a spouse's name ensures that the correspondence from the property manager or council addresses both parties.

You can also **OPT-IN** to receive documents electronically instead of having them mailed to you by checking the consent box.

Click 'Security' to update your login password.

Add Another Property To Your Account
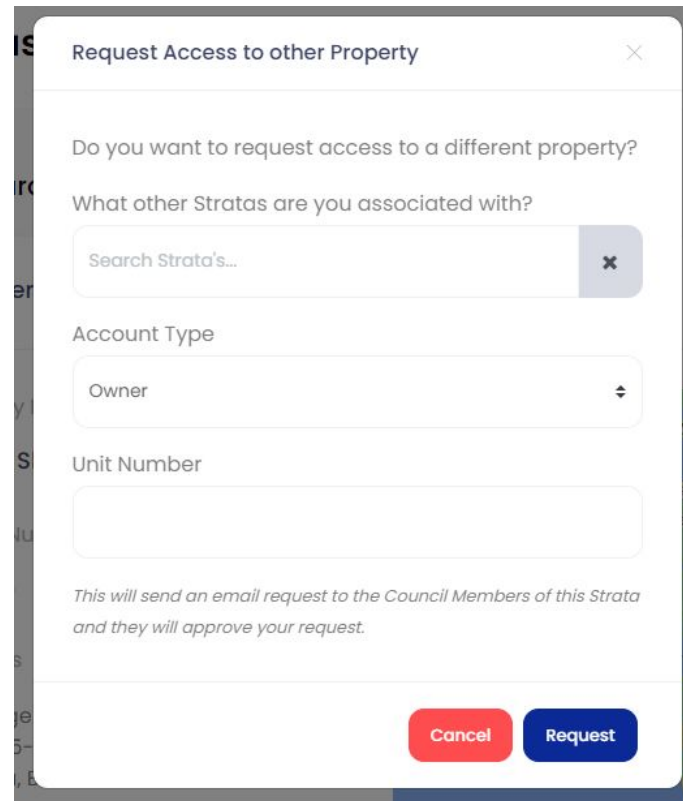

+ Add Property

You can access multiple Strata Corporations with one account, if they are all registered on the StrataPress platform.

So, if you are a Strata Owner at another Strata Corporation that is managed by a property management company (or self-managed) using StrataPress, you can request access to that property using this feature.

On the dashboard, above the location map of your property you'll see a green '**Add Property**' button.

Fill out the access request and click '**Request**'. A message will be sent to the property manager or council requesting approval for your access.

Request Access to other Property ✕

Do you want to request access to a different property?

What other Stratas are you associated with?

Search Strata's... ✕

Account Type

Owner ⇕

Unit Number

This will send an email request to the Council Members of this Strata and they will approve your request.

Cancel   Request

Managing Request for Form B and Form F Certificates

Dashboard

Documents

Orders

Updates

Discussions
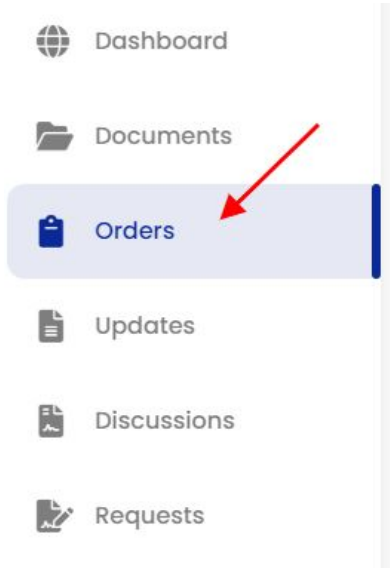
Requests

Realtors, Lawyers & Notaries all request trata certificates. Realtors primarily request Form B certificates and Lawyers and Notaries request Form F certificates.

When a request is made, all council members will receive an email notification. Any council member can complete the certificate if they have access to the correct and current information.

Orders can be viewed by clicking on the 'Orders' link on the main menu on the left side of the dashboard. Order are listed in the Orders section and can be viewed by clicking the 'View Order' link.

Order #	User	Form B	Form F	Paid	Status	Due
View Order #12761	Joe Realtor	Yes	Yes	$129.76	Pending	Jun 23, 2022 – 10:41 am

Managing Request for Form B and Form F Certificates

Order Details ≡

Order #	12761
Cost	$129.76
Status	Pending
Due	Thu Jun 23, 2022 – 10:41 am
Rushed	48hr

Form B — Strata Lot Number 140

[+ Create] [↥ Upload] [⊘ Cancel]

Form F — Strata Lot Number 140

[+ Create] [↥ Upload] [⊘ Cancel]

[Add Additional File(s) to Order]

The Order Details section provides all of the information about the request. The order illustrated to the left indicates a request for both a Form B and a Form F.

Council members can choose to create the certificate online using the blue **'+ Create'** button, or they can be completed by uploading a completed certificate (PDF) that was produced with another program by using the blue **'+ Upload'** button.

The mini-menu, to the top right of the Order Details, provided access to a few other options, like Reschedule Order, Cancel Entire Order and Request Undertaking.
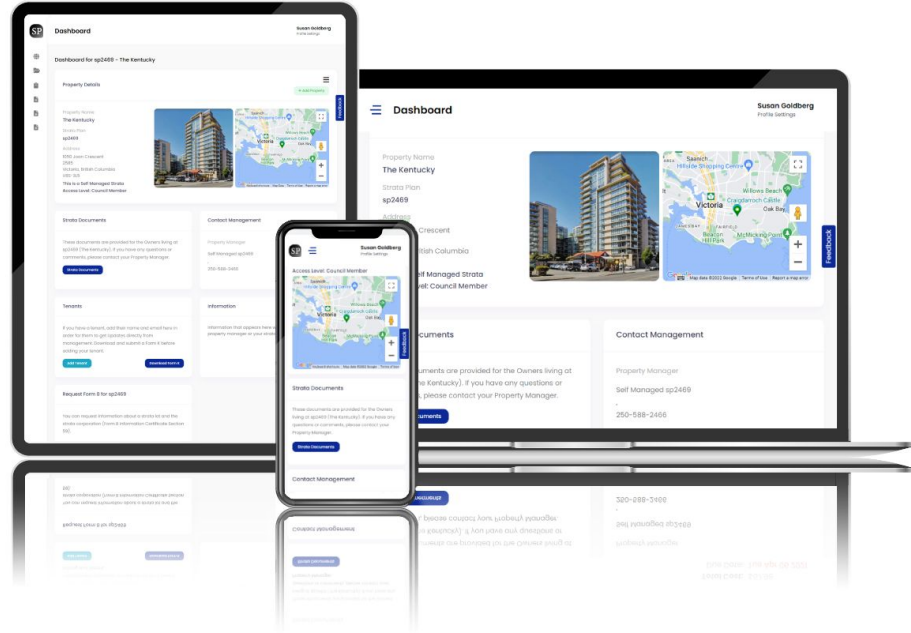
Complete step-by step guides for processing Form B and Form F certificates can be found online:

https://help.stratapress.com/process-a-form-b-request/
https://help.stratapress.com/process-a-form-f-request/

The Strata Owner's Portal is developed and maintained by Simple Strata Solutions, Inc.
For more help visit Help.StrataPress.com