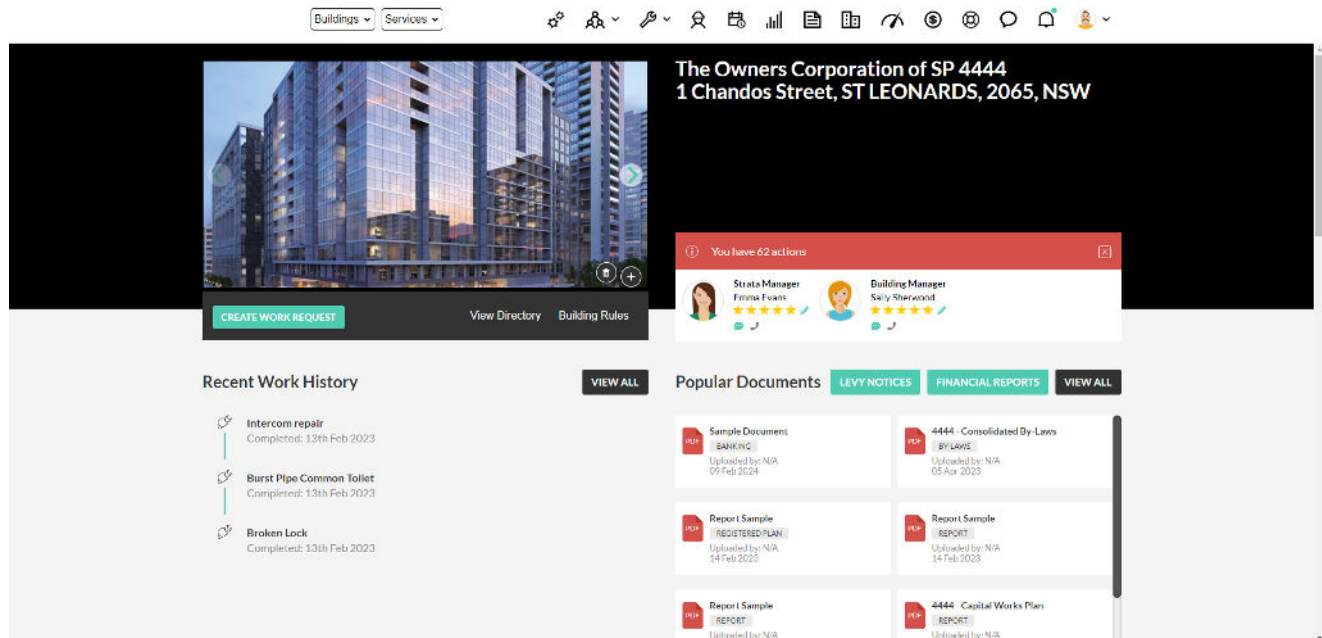




## Owners Portal Guide



### What is the portal?

The Portal is an online platform that brings owners, strata managers and service providers together and streamlines maintenance work and other building information in one simple system.

If you're a busy lot owner, accessing essential information about your building will save you time and effort. With just a few clicks you'll be able to:

- View and download important documents about your building such as your levy notices, by-laws, insurance policies and building plans.
- Log maintenance requests and view updates on maintenance jobs.
- Chat with your fellow owners/committee members, your building manager, and your strata manager.
- Generate up to date financial reports about your building.
- See important updates about your building. For example, scheduled service interruptions.



If you're a committee member you will also be able to:

- Review and approve quotes for maintenance jobs that have been assigned to you
- Review and approve invoices for payment if you're an invoice approver for your building.

## Frequently asked questions about the portal

### **Why do I need a portal account?**

Because the portal is a cloud-based software, each user needs to have their own account so they can access the information relevant to them. You will just need an email address to get started.

### **How do I activate my portal account?**

Email [myportalsupport@jamesons.com.au](mailto:myportalsupport@jamesons.com.au) and request a portal account.

Be sure to include your full name, lot number and Strata Plan number.

or

call 0488 841 400.

Your strata managers will register your account and you will receive an invitation via email that contains a link to activate your portal account.

Click on *Activate Profile* and then follow the steps to activate your account.

### **What should I do if the invitation link in my email isn't working?**

It's likely that your invitation link has expired. Email [myportalsupport@jamesons.com.au](mailto:myportalsupport@jamesons.com.au) and ask for a new invitation.

### **What should I do if I can't find my email invite?**

If you can't find the email invite, check your spam or junk folders. If you're still having problems email [myportalsupport@jamesons.com.au](mailto:myportalsupport@jamesons.com.au) and explain the problem clearly.

### **What should I do if I have forgotten my password?**

To reset your password, go to [smata.com](http://smata.com), select the Login option then *Forgot Password*. An email will be sent to your email address. Click *Update Your Password* to set a new password.



### **What is the building profile?**

The building profile shows important information about your building including a directory, building rules, items to action (for approvers), recent work history, popular documents, and jobs.

### ***I want to request maintenance. What should I do?***

You can request maintenance work and other services for your building by submitting a short request form. Click *Create Work Request* from the building profile just under the building photo.

### ***Why am I getting so many email notifications?***

Notifications keep you updated about items such as job status changes or invoices that need your approval. You can manage how and when you receive notifications by clicking on your profile initials or photo on the top right of the screen, then *Settings* and *Notifications settings*

### ***I'm an Invoice approver for my Building – how does invoice approval work?***

- You can approve any invoices assigned to you from the portal
- chat directly with a strata manager and other committee members about invoices that are being reviewed in the portal.
- You will be able to see the entire approval process and the actions other approvers for invoices for your building
- You can view all current and old Invoices for your building, including the invoice details, description and General Ledger code

### ***I'm not an invoice approver – why should I use the portal?***

You will have access to:

- The documents about your building that the strata manager has made available
- The portal makes communication easy, with a chat function so you can message your strata manager or other people involved in the building.
- You'll be able to view all the documents your strata manager has made available including handy documents such as levies, by-laws, minutes and quotes
- You can request up to date financial reports directly from the portal



***More information?***

[Here's a link to a short video about the owners portal](#)

[Here's a link to a twelve-minute training session/demonstration](#)

[Here's a link to the owner/committee member help page](#)