Financial Dashboard

Last Modified on 22/10/2026 6:47 am AEST

Rolling out progressively. The Financial Dashboard is being rolled out in stages, so not all buildings will see this option yet. When it is enabled for your building, it may be available to committee members only.

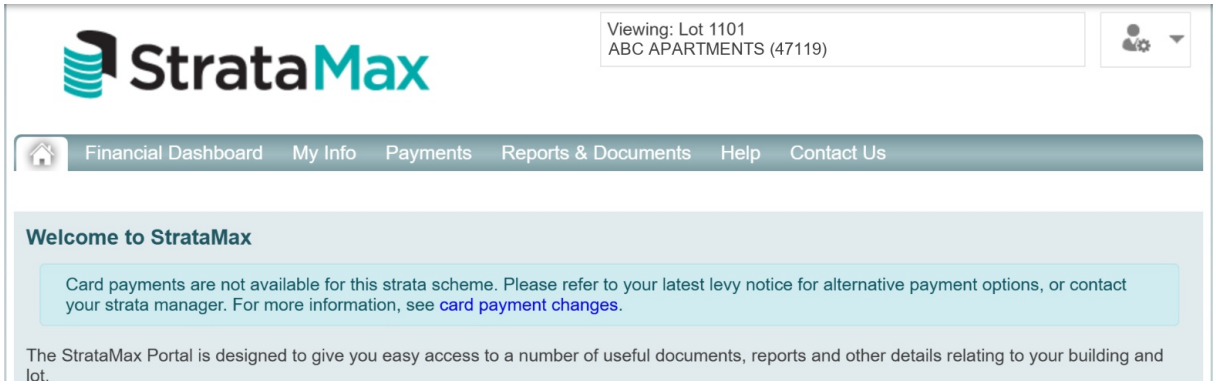
The **Financial Dashboard** gives you an overview of your building's finances on the StrataMax Portal. You can see how the building's cash balance has changed over the year, how each fund is tracking, and where money is being spent, right down to individual invoices.

The dashboard shows your building's finances, not your individual levy account. The information is updated overnight, so today's transactions will show tomorrow. Your StrataMax Portal home page may look slightly different from the examples below if your strata manager has customised it.

This phase introduces the first stage of the Financial Dashboard, providing owners with greater visibility into their building's financial performance through interactive reporting and visual insights. Availability of dashboard features may vary between buildings, as individual pages can be enabled or disabled by the strata management firm, and some features may require additional setup before they become available.

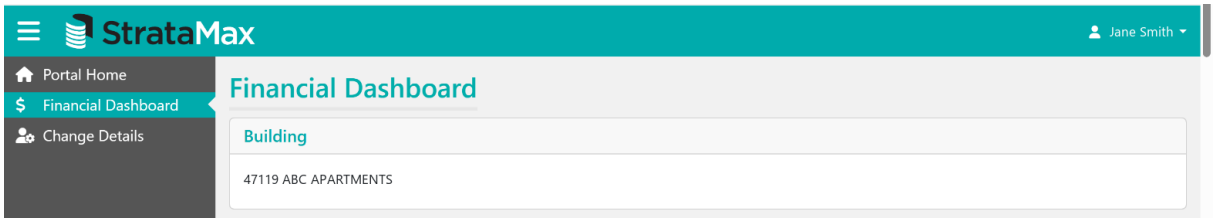
Open the Financial Dashboard

1. Log in to the *StrataMax Portal*.
2. Click *Financial Dashboard* in the menu at the top of the page.



3. The dashboard opens for your building. Every building linked to your StrataMax Portal account is

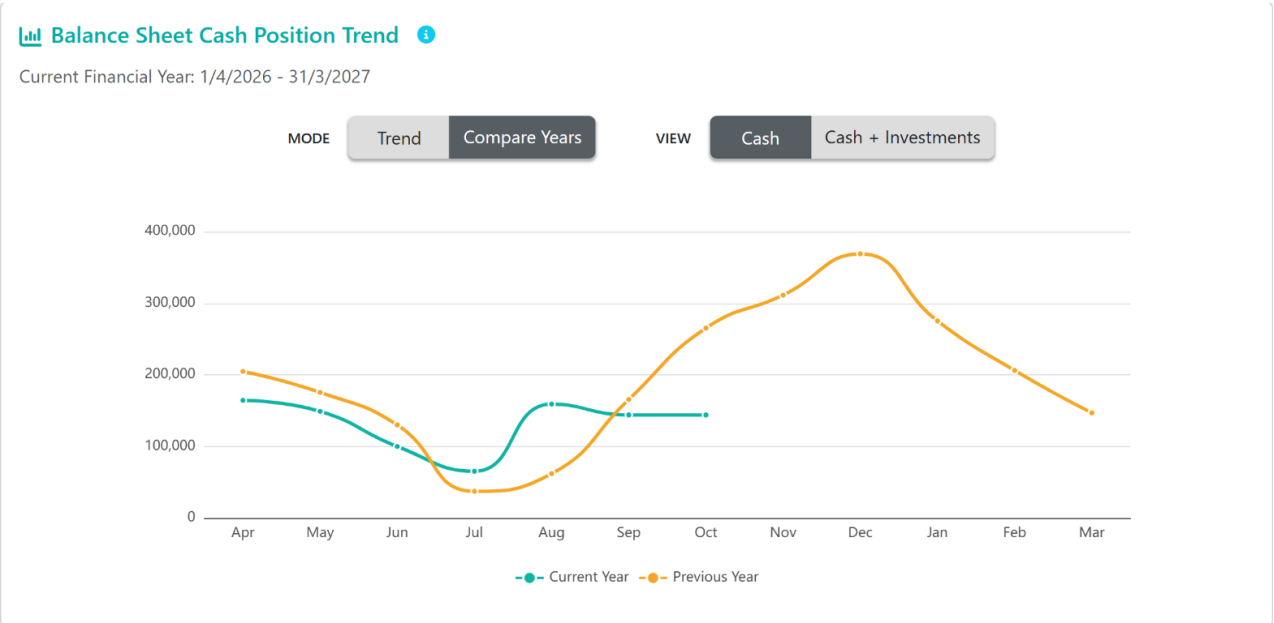
available. If you own properties in more than one building, use the *Building* field at the top to switch between them.



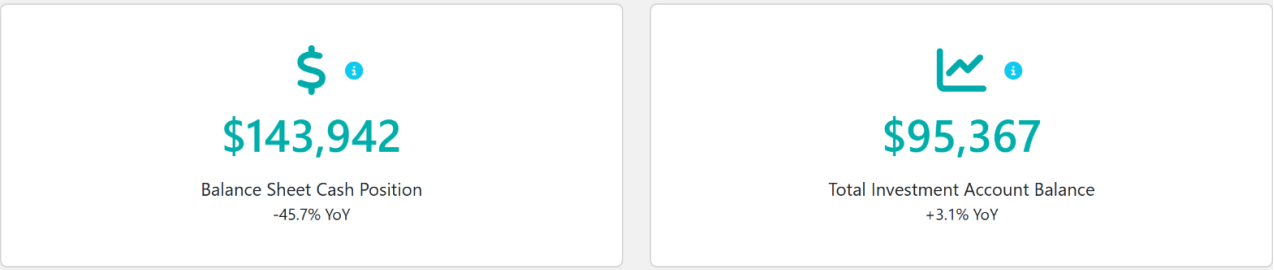
To return to the main Portal, click *Portal Home* in the menu on the left.

Financial Performance

The *Balance Sheet Cash Position Trend* chart shows how your building's cash position has changed over the financial year. To compare this year with last year, select *Compare Years*. To include the building's investments, select *Cash + Investments*. Hover over the chart to see the amounts for a month.



The percentage changes on the cards below the chart compare the current cash position and investment balance with the same date last year.

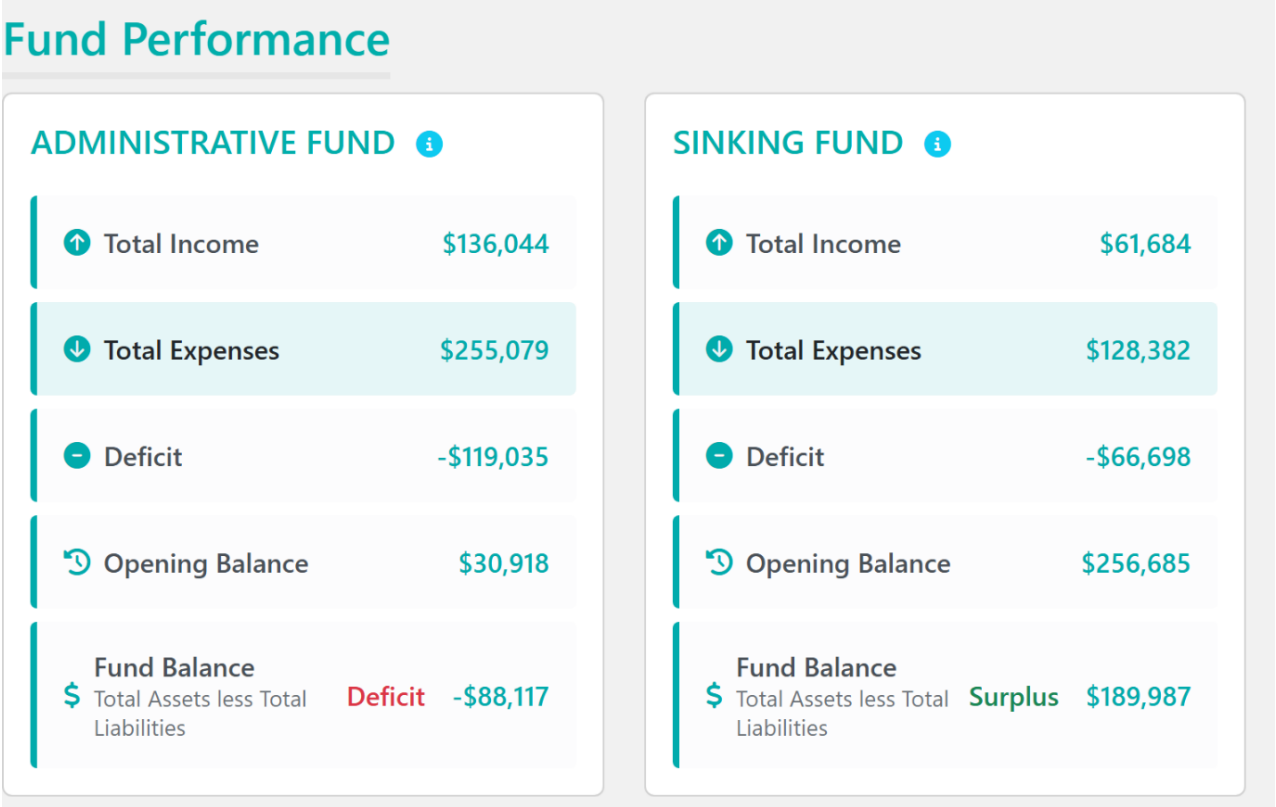


These balances include money the building is still expecting to receive or pay, so they may not match the bank statement.

Fund Performance

Each of the building's funds has its own card for the current financial year. A *Surplus* means the fund's income is greater than its expenses so far this year, and a *Deficit* means expenses are greater. This is different from the fund's balance, which is shown at the bottom of the card.

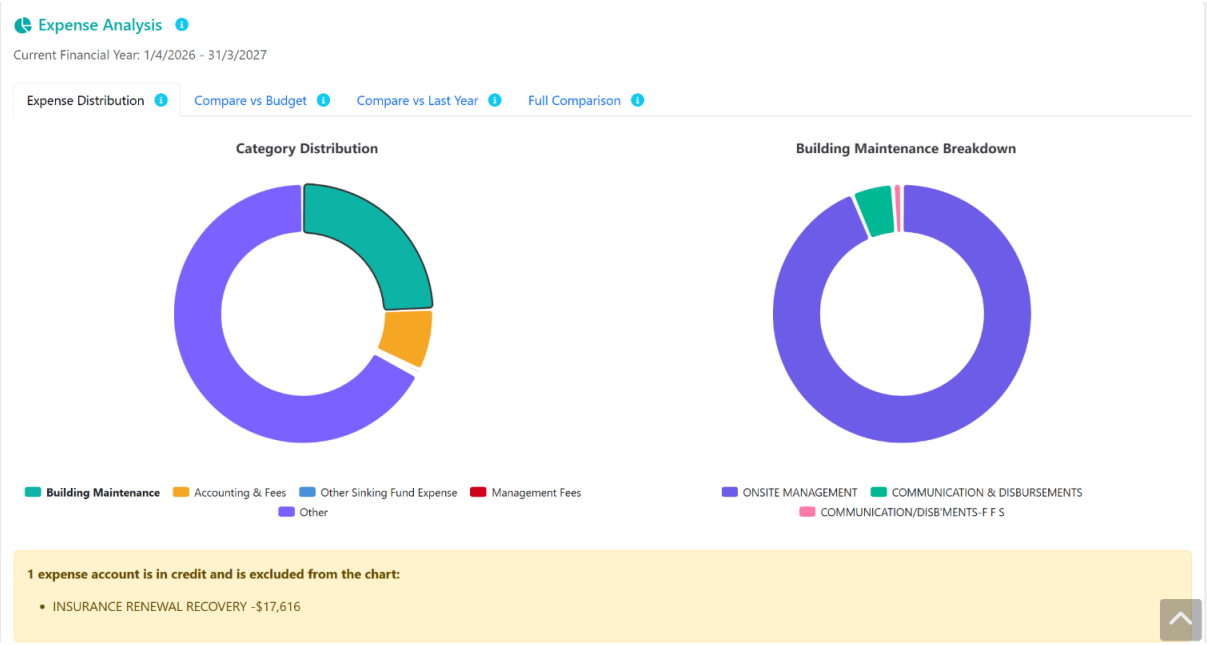
Click *Total Expenses* on a fund card to go to the *Expense Analysis* section.



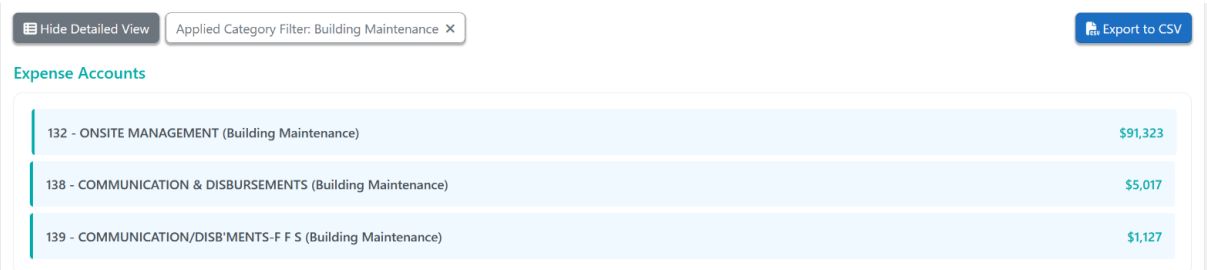
Expense Analysis

This section shows where the building's money has been spent this financial year.

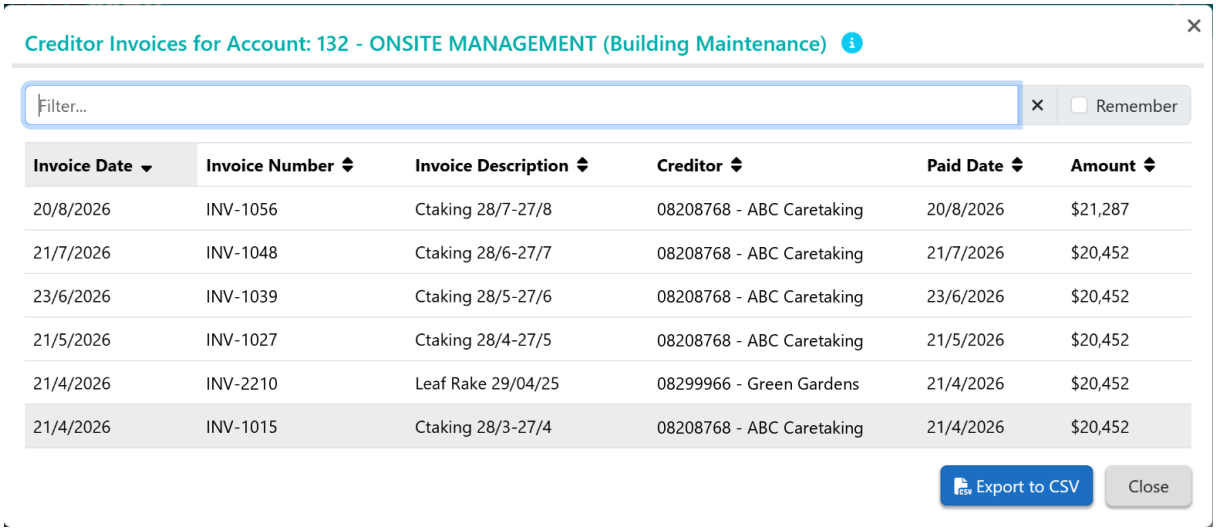
1. Click a category in the chart, or its name in the list underneath, to see the expenses that make up that category.



2. Click *Show Detailed View* to see the expenses as a list. Clear the category filter to see all expenses, or click *Export to CSV* to download the list as a CSV file.



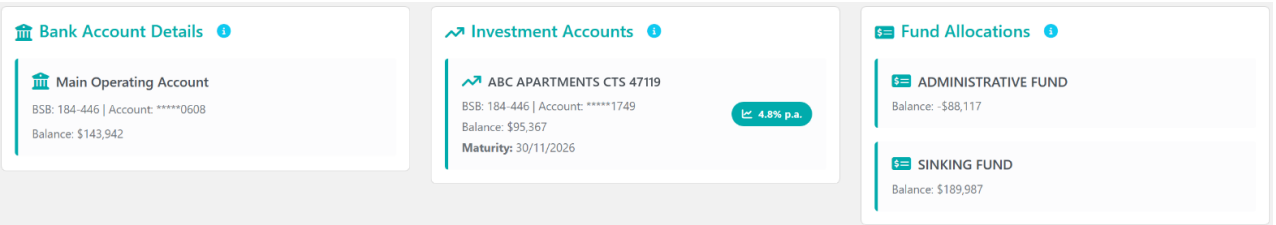
3. Click an expense to see the invoices recorded against it this financial year. You can search, sort and export the invoice list.



The other tabs in this section let you compare this year's expenses with the budget, with last year, or with both.

Bank Accounts, Investments and Fund Allocations

Bank Account Details and *Investment Accounts* show the building's current bank and investment balances, including the maturity date and interest rate of any investments. *Fund Allocations* shows how the building's overall balance is split between its funds. For security, only the last four digits of account numbers are shown.



Frequently Asked Questions

I can't see the Financial Dashboard in my Portal menu.
The Financial Dashboard is being rolled out progressively, so not all buildings have it yet. Where it has been enabled, it may be available to committee members only.

One of my buildings isn't listed in the Building field.
The Financial Dashboard may not be enabled for that building yet, or it may be enabled for committee members only. The building may also not be linked to your StrataMax Portal account. See *Adding Properties*.

I have a question about an expense or invoice.
Please contact your strata manager for more information about your building's finances.

Related Articles

- *Navigating the StrataMax Portal*
- *Adding Properties*
- *StrataMax Portal FAQ*