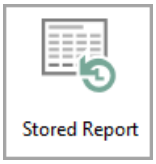
Stored Report

Last Modified on 16/11/2026 4:23 pm AEST



The instructions in this article relate to ***Stored Report.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

StrataMax automatically saves key reports, including Levy Notices, Levy Arrears, Certificates, Financial Statements and Merge Letters, for future review and reprinting. Financial Statements are also stored to ensure they can be reprinted exactly as originally issued, without needing to regenerate the report with a new date.

Financial Statements are required to be stored if you are attaching them to ***Status Reports***, and will still be available in Stored Reports to refer to.

Reports that are now stored in DocMax and available in Stored Reports are:

- Arrears Notices
- Certificates
- Financial Reports stored on Month-End Rollover
- Funds Management Reports
- Invoices
- Levy Notices
- Ledger Cards
- Merge Letters
- Status Reports
- Sub Group reports and Invoices

Please note that GLMax reports/documents will not be stored in DocMax, and Management Fee Invoices and Recoveries, if configured, will be. Deleting any of these documents from Stored Reports will also be deleted from DocMax. The same applies if you delete any of these from DocMax - they will also be deleted from Stored Report.

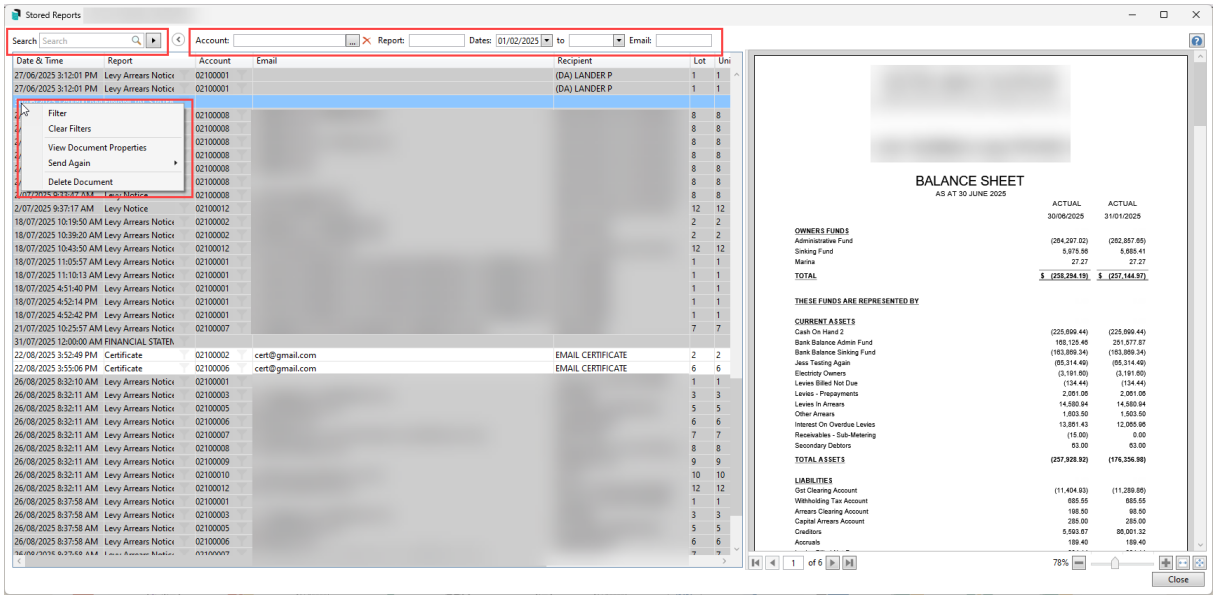
Security Setup

Access to ***Stored Report*** is controlled by the ***Stored Report*** permission on the ***BCMax*** tab in ***Security Setup***.

To delete reports and documents from ***Stored Report***, the user must also have the ***Delete Documents*** permission on the ***DocMax*** tab. Deleting a report or document from ***Stored Report*** also removes it from ***DocMax***.

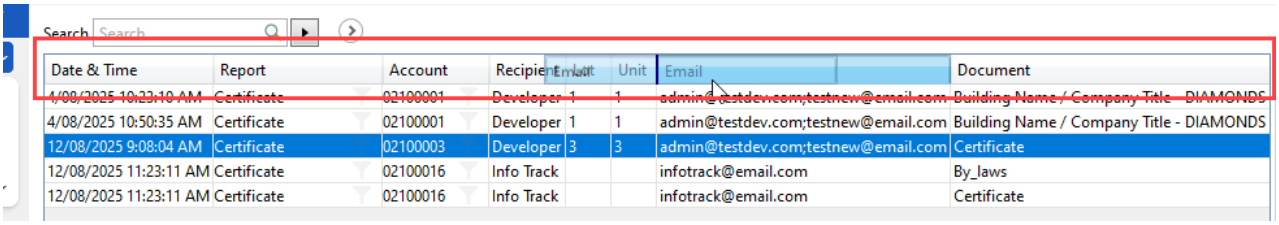
Viewing Stored Reports

1. In the selected building, search or select ***Stored Reports.***
2. All stored reports will be displayed for the building. Expand the window for easier viewing.
3. Either use the *Search* field or expand the filters to access additional fields of restriction.
    - If using the *Search* field, click the > button to locate the next result. Repeat for the next instance of text to find the next result.
    - If the additional search fields are being used, they are dynamic search fields and will filter as text is entered.
4. The right-hand side of the screen will include a preview of the document.
5. Right clicking on a document will provide further options to select:
    - Clear Filter - Clear the applied filter.
    - View Document Properties - This option opens the document in ***DocMax*** to view.
    - Send Again will provide these options:
        - Compose Email will open ***Communications*** ready for sending.
        - Report Distribution Batch will open the original batch the report was sent with in Report Distribution.
        - Selected Items Only will open the selected Report (s) in Report Distribution. NOTE: This option is designed to be used where multiple new style reports are selected.
    - Delete Document (Controlled with ***Security Setup*** / DocMax tab / Delete Documents).
6. To select multiple documents, select one document and hold Ctrl on the keyboard and select the next document, or Ctrl+A to select all (keep in mind email attachment size).



Changing the column display in Stored Report

To change the view of the stored report window for the current view, click on the column and drag it to the desired heading to reposition it. When closed and reopened, this will revert to the original view.



Viewing Stored Report via a DocMax Saved Search.

The information available in ***Stored Reports*** can also be created as a saved search in DocMax and can provide similar columns of information. Click here to review further information on creating this type of saved search.

Stored Reports | API vs BING

When viewing Stored Reports, the colour indicates the type of notice and available printing options for API or BING.

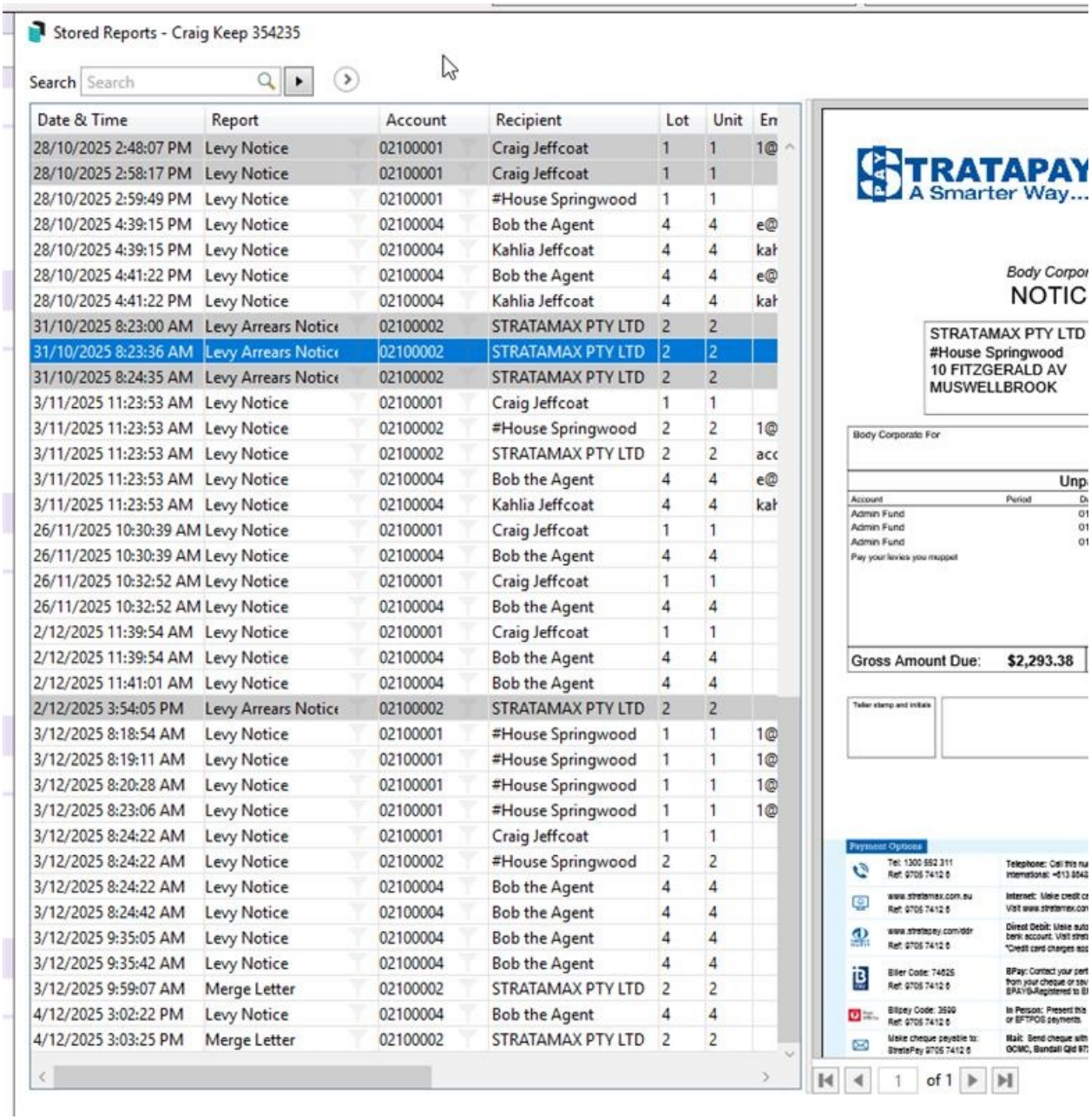
Grey Reports

- Represent older notices.
- Open in the older-style preview.
- **Printing Options:**
  - Can be printed to **Mailroom only**.

- No option to print via Bing API.

White Reports

- Represent notices originally distributed using the current method.
- When you **right-click** and select Resend (single or batch):
  - Opens the original report distribution preview.
  - If the original distribution used **Bing API**, you can resend via **API**.
- **Printing Options:**
  - Same method as the original distribution applies.



Owner Tax Info Report

This is the one area that can only be accessed via Stored Report and not directly from the menu.

1. Search or select ***Stored Report.***
2. Maximise the screen if required.
3. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Owner's Tax Year' or email column).
4. This will then display only the selected detail for filtered account.
5. Tag (click in the tag column field) to select the individual Owner Tax Year Report.
6. Click *Preview*.
7. Once the Owner Tax Year Report has displayed to screen, you may then either Print or Email as required.

Utility Stored Report

As the Utility Bills are stored when they are printed or emailed, you can retrieve the stored notice to re-send to the resident.

1. From the 'Utility' Group search or select ***Stored Report***.
2. Or from Utility Billing via 'GoTo' / 'Print Stored Bills'.
3. Maximise the screen if required.
4. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Electricity Bill DD/MM/YY or email column).
5. This will then display only Electricity Bills for the filtered account.
6. Tag (click in the tag column field) to select the individual Utility Bills.
7. Once the Bill has displayed to screen, you may then either Print or Email.

Financial Statements

At each month end rollover, the Financial Statements will be available for reproducing. This is the recommended action to obtain backdated financial's. If trying to achieve the same result from Financial Statements, with the 'Report Period' the result may not be as effective as reviewing the Stored Report, due to the Balance Sheet consisting of current posting accounts that do not backdate.

1. Search or select ***Stored Report.***
2. Maximise the screen if required.
3. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Financial Statements').

4. This will then display only the selected detail for filtered account.
5. Tag (click in the tag column field) to select the individual Financial Statements.

To adjust the format of the stored monthly Financial Statements, select the Report Name in ***Financial Statements*** and under Options click *Save Settings for StrataMax*.