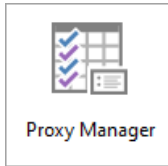


Proxy Manager

Last Modified on 31/01/2025 12:07 pm AEST



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

These records are used for a specific proxy manager report as outlined below, and the most current record will also be reported on the **Voting Register**. Permanent proxies noted in the **Roll** will be flagged on the report. For any lot that holds more than one nominee, there will be subsequent lines for this lot with the proxy holder's information, which can be helpful when preparing for meetings.

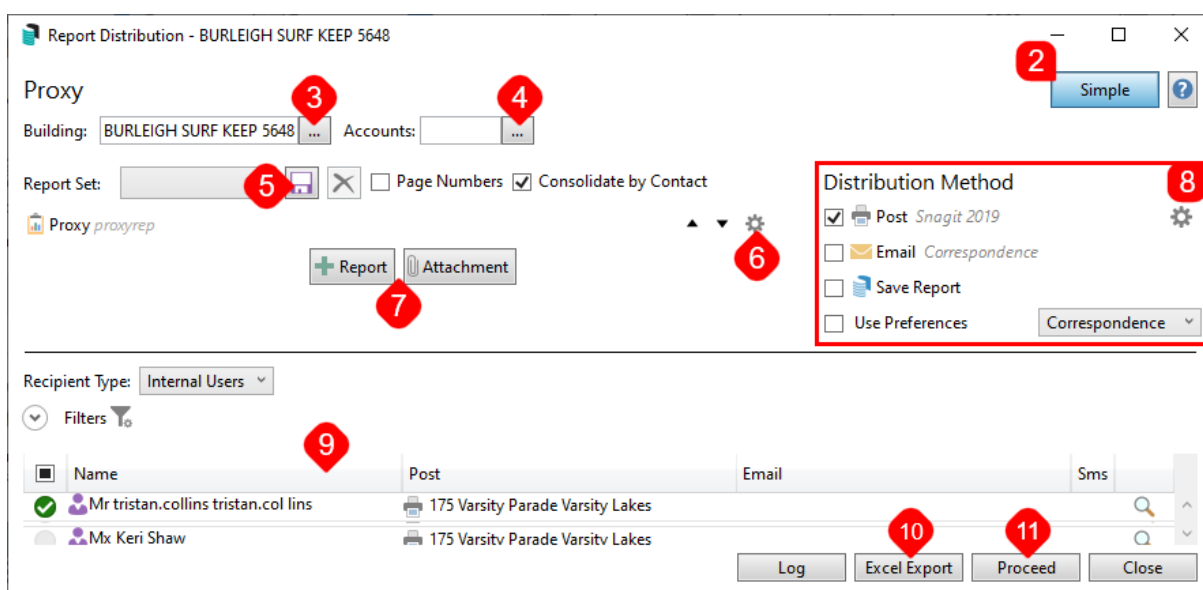
Proxy Manager | Producing a Report

The Proxy Manager uses the **Report Distribution** screen. This section serves as a quick reference guide on how to produce the proxy report, along with any requirements and limitations it has.

For a proxy to appear on this report, it must first be added to lots in the **Roll**. Please see [how to add other contact types to a lot for more info](#).

1. Search or select **Proxy Manager**.
2. Click the *Advanced* button in the top right to display more options, buttons, tick boxes, the recipient list, etc.
 - The button name will change to 'Simple', which can be clicked to hide all the options, buttons, tick boxes, the recipient list, etc.
3. If you want to run the report for multiple buildings, click the ellipsis button next to the *Building* field in the top left. Then, choose (tag) the required buildings and click OK.
4. If you want to limit the report to display specific accounts, click the ellipsis button next to the *Accounts* field in the top left. Then, choose (tag) the required accounts and click OK.
5. Use the 'Report Set' Save button if you have added additional *Reports* or *Attachments* and would like to save these as a report set to be used again.
6. To configure the report, click the cogwheel next to the report/template name.
 - *Report Order* changes the data in the report to an alphanumeric order.
 - *Include Lots with no proxy* can be ticked to include lots in the report even if no proxy is present in that lot.
 - The *Template* is a drop-down menu where you can view the template available.
7. An additional *Report* or *Attachment* can be added by clicking the relevant buttons.




8. Choose the *Distribution Method: Post, Email, Save Report, Use Preferences*, and configure each by clicking their respective cogwheels.
 - In the 'Report Publish' screen, there are additional options to e-mail the report, save it to DocMax, or save it to a Windows folder.
9. Internal Users is the default *Recipient Type*, and the current user is selected to receive the report. However, the *recipient type* can be changed, and more recipients can be selected from the list to receive the report.
10. Click the *Excel Report* button to export the report to an Excel sheet.
11. Click *Proceed* to display the 'Report Publish' screen where the report can be reviewed before being sent/printed/saved.



12. In the 'Report Publish' screen, use the relevant buttons to e-mail the report, save it to DocMax, or save it to a Windows folder.
13. If the report is being run for multiple buildings, click through the recipient/s on the left side to view the report for each building.
14. If you would like to e-mail/send to multiple recipients, click *Proceed*. Or click *Cancel* to close the 'Report Publish' screen and return to make any required changes.

Report Publish

Recipient

-  Mr tristan.collins tristan.col
-  Mr tristan.collins tristan.col
-  Mr tristan.collins tristan.col

Options: Email enabled where email exists

Print: Mr tristan.collins tristan.col, lins, 175 Varsity Parade, Varsity Lakes

Email To: tristan.collins@stratamax.com

Subject: StrataMax Report

Message:

Please see attached report

Kind regards,

Proxy

Proxy

PROXY/NOMINEE REPORT 14 Nov 2024

Burleigh Surf CTS 56482

As No	Lot No	Owner	Proxy Holder	Permanent	Expiry	Est.	1st Nominee	2nd Nominee
02100001	1	Smart Breakz Pty Ltd				250	New Nominee	
02100002	2	Billy Brown	Proxy Person	Yes		228		
02100003	3	Paul Joseph Zietuch				259		
02100004	4	Shane & Michelle (Deceased) and Kathy Ann (Member)				264		
02100005	5	Amabel & Myra Mesbrom				249		
02100040	40	Steve Roddell, Alan Stephen Roddell & Janet Cheryl Roddell				283		

Print Pages: 20 Email Messages: 3

61% 1 of 3 Proceed Cancel