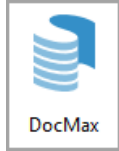


DocMax | Advanced Search and Saved Searches

Last Modified on 16/02/2026 10:25 am AEST



This article covers how to use the *Advanced Search* function in **DocMax**, and how to save them as a *Saved Search*. It also explains how to create, edit, and delete these *Saved Searches* in the *Administration tab*. The **DocMax** icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

We also offer a completely free 'DocMax Basics' online course, which you can enrol in [here](#)! Please see the [StrataMax Online Courses](#) page for more details, including the coupon code required to enrol for free.

Advanced Searches

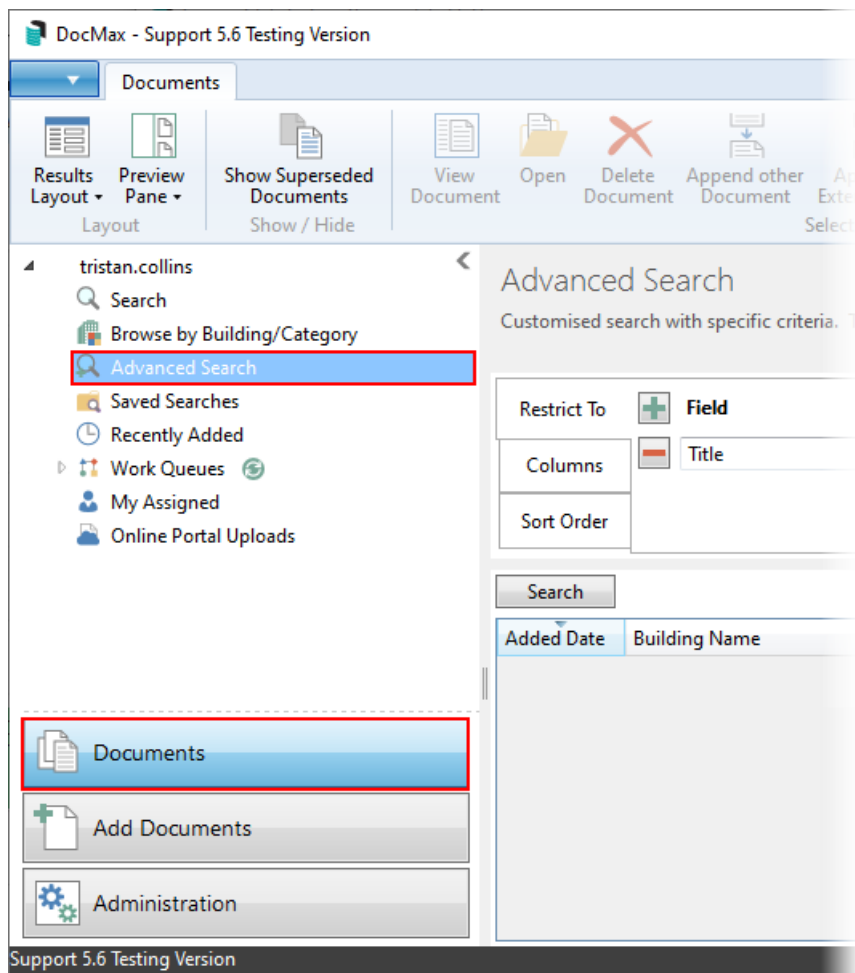
An *Advanced Search* has been designed to give users a more powerful method of locating documents in **DocMax**. If you use the default search options, *Browse by Building/Category* or *Search* without locating the required documents, you can use the *Advanced Search* function.

An *Advanced Search* enables you to search documents that match multiple filters, such as specific buildings, categories, keywords, and many, many more. The results of an *Advanced Search* are limited to the first 1000 documents, and the *Columns* and *Sort Order* can also be configured to allow the results to display more appropriately.

An *Advanced Search* can also be saved as a *Saved Search* for later use (see further down this page).

Create an Advanced Search

To create an Advanced Search, open **DocMax**, ensure you are in the *Documents* tab, then click the *Advanced Search* menu in the list on the left.



Restrict To

Upon opening the *Advanced Search* function, the *Restrict To* tab will be selected. This is where you configure the criteria or *filters* you want your search to have. Click the green '+' button to add a criteria, and click the red '-' button to remove that criteria. Each criteria has three options that need to be configured; **Field**, **Condition**, and **Value**.

1. Click the **Field** drop-down to select the filter you want to include.
 - Which filter you choose will depend on the type of document you want to search for, but we recommend including at least 'Building Name' (or number), 'Categories', and 'Title'.
 - When the 'Creditor' **Field** is included with the **Condition** 'is any of', it will allow for the selection of multiple creditors.
2. The **Condition** drop-down options will change based on the *Field* you selected. For example:
 - If you selected 'Added Date' as the *Field*, the *Condition* drop-down will contain options that lend themselves accordingly.
3. The **Value** drop-down options will also change based on the *Field* and/or the *Condition* you selected. For example:
 - If you selected 'Added Date' as the *Field*, and 'is in the range' as the *Condition*, the *Value* will contain a tick box for a *Specific Dates* box and two date menus.
 - If you selected 'Added Date' as the *Field*, and 'is in the last 7 days' as the *Condition*, the

Value will disappear entirely.

- Once all filters have been added, click the *Search* button to test that the right types of documents are being displayed.

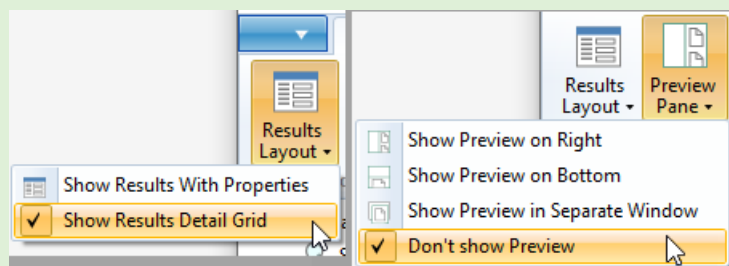
Here is an example of which **Fields**, **Conditions**, and **Values** you could configure for a generic document search.

Restrict To	Field	Condition	Value
Columns	<input type="checkbox"/> Building Name	is any of	
Sort Order	<input type="checkbox"/> Title	contains	
	<input type="checkbox"/> Added Date	is in the range	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>
	<input type="checkbox"/> Categories	is any of	
	<input type="checkbox"/> Extracted Text	contains	

Columns

After adding all the required fields in the *Restrict To* tab, you can determine which columns are displayed for this *Saved Search* as well as the order of the columns from left to right.

In order to see the columns, you will need to select 'Show Results Detail Grid' under the *Results Layout* option, and we recommend temporarily selecting 'Don't show Preview' under the *Preview Pane* option.



- Add more columns by selecting the column name in the *Available Columns* list on the left, then clicking the *Add>* button, which moves the column name to the *Displayed Columns* list on the right.
- Remove columns by selecting the name in the *Displayed Columns* list on the right, then clicking the '*< Remove*' button, which moves the column name to the *Available Columns* list on the left.
- Change the order of the columns by selecting a column in the *Displayed Columns* list on the right, and clicking the *up* or *down* arrow buttons. The column at the top of the list will be the first column in the search results.

Sort Order

The *Sort Order* tab shows the order in which the document results are displayed. By default, the results will be sorted in *Added Date* order, but can be configured to sort documents in the search results according to the fields in the *Sorted Columns* list on the right, in the order that they appear in the list, and by the label on the button next to the field.

The screenshot shows the 'Sort Order' configuration interface. On the left, under 'Restrict To', there is a 'Filter' input field. Below it, under 'Columns', is a list of available fields: 'Owner Name', 'Remove From Portal After Date', 'Should Upload For Invoice Hub', and 'Should Upload For Meeting Hub'. An 'Add >' button is next to this list. On the right, under 'Sorted Columns', there is a list of selected fields: 'Added Date', 'Building Number', and 'Title'. Each field has a corresponding sort order button: 'Newest First' for 'Added Date', and 'A to Z' for 'Building Number' and 'Title'. A '< Remove' button is also present. Below the configuration, a 'Search' button and a status indicator '20 records displayed' are shown. The search results table has four columns: 'Added Date', 'Building Name', 'Building Number', and 'Title'. The first row is highlighted in blue and has a red box around its header. The data rows show dates, building names, building numbers, and titles.

Added Date	Building Name	Building Number	Title
14/05/2021	JAS TEST	1J	Recoveries Invoice
05/05/2021	1 FREESTONE DRIVE KEEP	383785	123
05/05/2021			Test 5
05/05/2021			Test 5
05/05/2021			Test 5

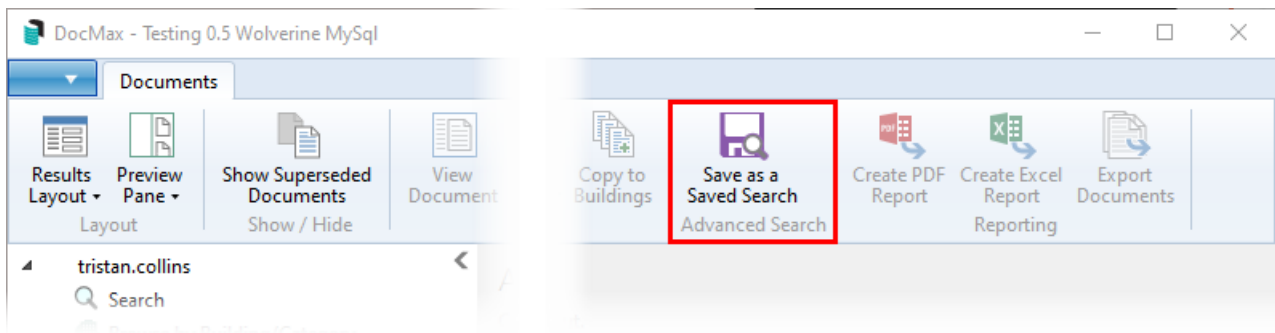
- Add more fields to sort by, by clicking the column name in the *Available Columns* list on the left, then clicking the *Add>* button, which moves the column name to the *Sorted Columns* list on the right.
- Remove columns by selecting the name in the *Sorted Columns* list on the right, then clicking the *<Remove* button, which moves the column name to the *Available Columns* list on the left.
- Change the sort order of the search results by selecting a column name in the *Sorted Columns* list on the right, and clicking the *up* or *down* arrow buttons, and then clicking the button next to each item. The sort order will then be reflected in the column headings of the search results.
- The heading will be highlighted, and an arrow will indicate the direction of the sort (A to Z; 0 to 9; earliest to latest, etc.), and can be changed by clicking a column header.
- If the search results are restricted and you click a column header, the *Advanced Search* will refresh and the results re-listed in the selected sort order. This ensures that the most relevant documents are not excluded from the list.

For performance reasons it's not possible to sort the search results with the following fields:

- Added From
- Applies To
- Categories
- Custom Properties
- Insurance Claim
- Insurance Policy
- Is Uploaded to Online Portal
- Portal Upload Status

- Search Words
- Transaction Reference

Once you have configured the Advanced Search to your liking, you can optionally save it as a *Saved Search* by clicking the *Save as a Saved Search* button in the DocMax ribbon at the top of the DocMax screen.

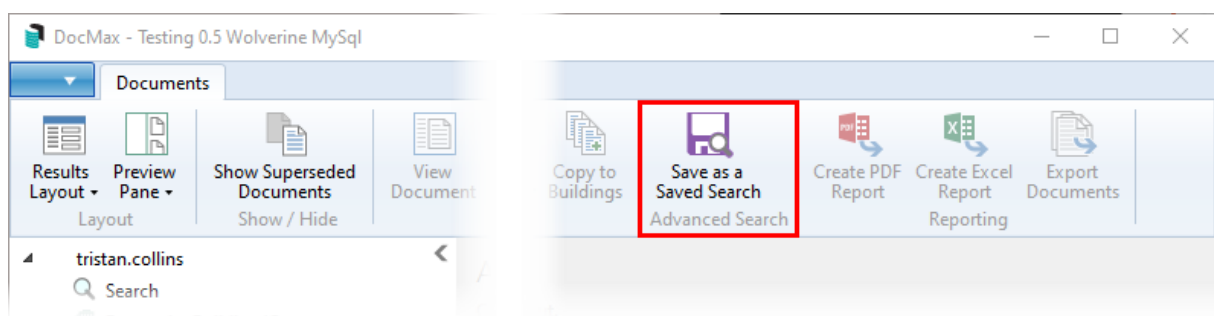


Saved Searches

A *Saved Search* is essentially an *Advanced Search* that has been saved so it can be used again and again. Saved searches can also be restricted to certain users or groups, which are managed in [Security Setup](#). If you cannot see a *Saved Search* that other users can, then it's most likely because the *Saved Search* is available to security group that you are not a member of. If you cannot see a *Saved Search* that another single user can see, then it's most likely that their *Saved Search* was created using the *Advanced Search* function in the *Documents* tab and then saved as a *Saved Search*.

Basically, a *Saved Searches* can be created in two different ways:

- Use the *Advanced Search* function in the *Documents* tab, to set up the specific criteria, columns, and sort order, and then save the *Advanced Search* as a *Saved Search* by clicking the *Save as a Saved Search* button in the DocMax ribbon at the top of the DocMax screen. This will result in the *Saved Search* only being visible to that specific user unless it is then edited in the *Administration* tab, in the *Saved Searches* menu, and the *Available To* field is changed to another user or group.



- Open the [Administration tab](#) and use the *Saved Searches* function there.

To edit an existing *Saved Search* you will need access to the [Administration tab](#) where you can use the *Saved Searches* function there.

Saved Searches can define a specific field, conditions and values. Columns can be added or removed and a sort order can be applied to the returned results. This is important to set as this cannot be manipulated when running the *Saved Search*. The below information is based on running *Saved Searches*. The first 1000 results will be displayed and exported to Excel or PDF. When exporting results it should be noted that all results will export regardless of the results returned.

Excluding or including BCMax System documents is a consideration when building an advanced search.

General Document Search

This example steps you through how to set up a general document search, which all users can use throughout your office. This is just one example to demonstrate how to add a *Saved Search*, but you can add any *Saved Search* you or your team members need.

Consider excluding *BCMax System* documents with a restriction as per step 6. Field: *Added From* is not equal to *BCMax System*. This will exclude any Arrerars, Levies, Ledger Cards (BCMax System) documents from reporting in the search.

1. In the *Administration* tab, select the *Saved Searches* option in the list on the left.
2. Click the *Add New* button (green cross) in the ribbon at the top.
3. Type 'Document Search' into the *Name* field.
4. The *Description* field isn't mandatory but it can be useful to explain what the purpose of this search is. This won't be visible anywhere else but this screen.
5. Change the *Available To* drop-down menu to 'Users' group as this will ensure this *Saved Search* will be available to all users.
 - Do not set this to 'Everyone' as this could potentially make the search available to external parties who are not in the 'Users' group.
6. In the *Restrict To* tab, add the required *Fields* by clicking the green plus button, then use the drop-down menu to select the field.
7. Then click the drop-down under the *Condition* Assign the *Condition* of restriction. In this example, *Building Name* with the condition of *is any of* will populate the StrataMax buildings to select from.
8. Leave the *Value* blank as this will be the variable that is used when running the search.
9. Repeat for further fields of restriction.
10. Once all fields of restriction have been added, go to *Columns* to review what columns are

presented and in what order.

- Following the *Column* sort order, go to *Sort Order* to apply preferences on the way the results are sorted.
- Once the above has been reviewed, click *Save as a Saved Search*. Give the search a 'Name' and if required, give the search a description. Assign who the saved search is available to, either the User or a Group that the member is a part of.

Name: General Documents			
Description:			
Available To: Users			
Restrict To	Field	Condition	Value
Columns	Building Name	is any of	
Sort Order	Title	contains	
	Added Date	is in the range	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>
	Categories	is any of	
	Extracted Text	contains	

Invoice Saved Search

With document attachment available to Creditor Commitments, the below search is a guide to some of the fields of information that can assist with locating invoice type documents. These invoices can also be previewed via BCMax; Transaction Lists, Preview Document and Linked Invoices and other various areas.

Consider excluding *BCMax System* documents with a restriction as per step 3. Field: *Added From* is not equal to *BCMax System*. This will exclude any Arrerars, Levies, Ledger Cards (BCMax System) documents from reporting in the search.

- Select *Advanced Search* to review the document property restrictions that can be configured.
- Using the *Field* restriction, assign a criteria of restriction. For example: *Creditor* is the field restriction.
- Assign the *Condition* of restriction. In this example, *Creditor* with the condition of *is equal to* will populate the BCMax Local Creditor List to select from.
- Leave the *Value* blank as this will be the variable that is used when running the search.
- Repeat for further fields of restriction.
- Once all fields in the *Restrict To* tab have been added, click the *Columns* tab to configure which columns are visible, and in what order they are presented across the screen.
- Next, click the *Sort Order* tab to apply any sorting preferences that would be useful for the type of documents.
- Once the above has been reviewed, click 'Save as a Saved Search'. Give the search a 'Name' and if required, give the search a description. Assign who the saved search is available to, either the User

or a Group that the member is a part of.

Name	Invoices		
Description	This search can be used to find invoices based off the Invoice Number, Amount & Creditor.		
Available To	Users		
Restrict To	<div><div><div><div><div></div><div></div></div><div>Field</div></div><div>Condition</div><div>Value</div></div></div>		
Columns	<div><div><div></div><div></div></div><div>Building Name</div><div>is any of</div><div></div></div>		
Sort Order	<div><div><div></div><div></div></div><div>Creditor</div><div>is equal to</div><div></div></div>		
	<div><div><div></div><div></div></div><div>Invoice Amount</div><div>is equal to</div><div></div></div>		
	<div><div><div></div><div></div></div><div>Invoice Date</div><div>is in the range</div><div><input checked="" type="checkbox"/> Specific Dates</div><div></div><div>to</div><div></div></div>		
	<div><div><div></div><div></div></div><div>Invoice Number</div><div>contains</div><div></div></div>		
	<div><div><div></div><div></div></div><div>Is Building on Invoice Hub</div><div>is equal to</div><div><input type="radio"/> Yes <input type="radio"/> No</div></div>		
	<div><div><div></div><div></div></div><div>Categories</div><div>is any of</div><div></div><div>Invoices</div></div>		
	<div><div><div></div><div></div></div><div>Extracted Text</div><div>contains</div><div></div></div>		

Stored Report (BCMax System Documents)

The below provides a framework for DocMax and a saved search that will give the same functionality as what is available in **Stored Reports**. Information can be checked on a building and lot basis from the **Roll** from StrataMax.

This saved search is for *BCMax System* documents only. As per step 3, the restriction field: *Added From* is equal to *BCMax System*. This will include any Arrerars, Levies, and Ledger Cards and other (BCMax System) documents in the search. There is also a Field titled *File Format* which can search for or restrict *StrataMax Stored Report*.

1. Search or Select **DocMax**.
2. From the *Advanced Search* area or the *Administration* tab, use the *Saved Searches* area. Click *Add New* to create a new search.
3. Add the fields of restriction. The area for StrataMax documents is *Added From is equal to BCMax system* or *File Format is equal to StrataMax Stored Report*. Add any further fields of restriction to make the search user-friendly. Also, review the *Columns* area and include relevant column display. The *Sort Order* area can be defined too if required.
4. Click *Save Changes* if creating via the Administration Tab, ensuring you make this search *Available To* the appropriate user or group. Or if started from the Advanced Search area, click *Save as a Saved Search* and assign the *Available To* area.

Name

Stored Reports

Description

This is a saved search using the same fields as Stored Reports

Available To

Everyone

Restrict To

Field

Condition

Value

Columns

Building Name

is equal to

Sort Order

Building Number

contains

Added From

is equal to

BCMax System

Lot

contains

Lot Account Code

contains

Email Recipient

contains

Added Date

is on

☐ Specific Dates

Title

starts with

Review Results

605 records displayed

Added Date	Building Name	Building Number	Title	Description	Lot Accou	Email Recipient
20/06/2023			Lana Letter	Lana Letter	02100001	support@stratamax.com.au
20/06/2023			Name and Address	Name and Address		test1@email.com;test2@email.com
20/06/2023			Name and Address	Name and Address		developer@email.com
20/06/2023			Name and Address	Name and Address		
20/06/2023			Name and Address	Name and Address		
20/06/2023			Name and Address	Name and Address		
20/06/2023			Keri	Keri	02100240	
20/06/2023			Levy Notice		02100240	
19/06/2023			ELECTRICITY ARREARS 19/0		02100038	
16/06/2023			ELECTRICITY ARREARS 16/0		02100172	
16/06/2023			ELECTRICITY ARREARS 16/0		02100095	
16/06/2023			ELECTRICITY ARREARS 16/0		02100054	
16/06/2023			ELECTRICITY ARREARS 16/0		02100038	
16/06/2023			ELECTRICITY ARREARS 16/0		02100201	
16/06/2023			ELECTRICITY ARREARS 16/0		02100180	
16/06/2023			ELECTRICITY ARREARS 16/0		02100178	
16/06/2023			ELECTRICITY ARREARS 16/0		02100168	
16/06/2023			ELECTRICITY ARREARS 16/0		02100145	
16/06/2023			ELECTRICITY ARREARS 16/0		02100130	
16/06/2023			ELECTRICITY ARREARS 16/0		02100124	
16/06/2023			ELECTRICITY ARREARS 16/0		02100115	

Documents

Results Layout

Preview Pane

Show Superseded Documents

View Document

Open

Delete Document

Append other Document

Append External File

Disbursements

Print

Email

View History

Copy to Buildings

Save as a Saved Search

Create PDF Report

Create Excel Report

Export Documents

Jana.clarke

Search

Browse by Building/Category

Advanced Search

Saved Searches

Recently Added

Work Queues

My Assigned

Online Portal Uploads

Advanced Search

Customised search with specific criteria. The results can be displayed in your preferred layout.

Restrict To

Field

Condition

Value

Columns

File Format

is equal to

StrataMax Stored Report

Sort Order

Building Name

is equal to

STRATAMAX ONLINE HELP KEEP

Search

99 records displayed

Added Date	Building Name	Building Number	Title	Description	Assigned To	Status
09/01/2026	STRATAMAX ONLINE HELP	300621	Invoices			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
03/12/2025	STRATAMAX ONLINE HELP	300621	Invoices			
03/12/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
05/11/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
23/10/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
02/10/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
15/09/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
21/08/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
21/08/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			

STRATAMAX ONLINE HELP KEEP CTS 1521

Body Corporate and Community Management Act 1997

NOTICE OF CONTRIBUTIONS

Alison Smith & SMITH PETER

Belles Estate Agent

4/113 Breakfast Creek Rd

NEWSTEAD QLD 4000

Date of Notice

17 December 2025

Lot No.

1

Unit Number

1

Contrib Rate

10

Interest Rate

0

STRATAMAX ONLINE HELP KEEP CTS 1521

Account	Period	Due Date	Amount	Discount	Final Due	Net Amount
Admin Fund Special	Testing Period	01/10/2024	\$1,000.00	\$0.00		\$1,000.00
General Fund	01/05/25 to 31/03/26	01/05/2026	\$100.00	\$0.00		\$100.00
Other - Due Immediately			\$10.00	\$0.00		\$10.00

Results

- Layout
- Preview Pane
- Show Superseded Documents
- View Document
- Open
- Delete
- Add new Document
- Append External File
- Disbursements
- Print
- Email
- View History
- Copy to Buildings
- Save as Saved Search
- Create PDF Report
- Create Excel Report
- Export Documents

Advanced Search

Customized search with specific criteria. The results can be displayed in your preferred layout.

Restrict To

Available Columns
Filter File
COLUMNS
File Format Id
Original File Name

Sort Order

Displayed Columns

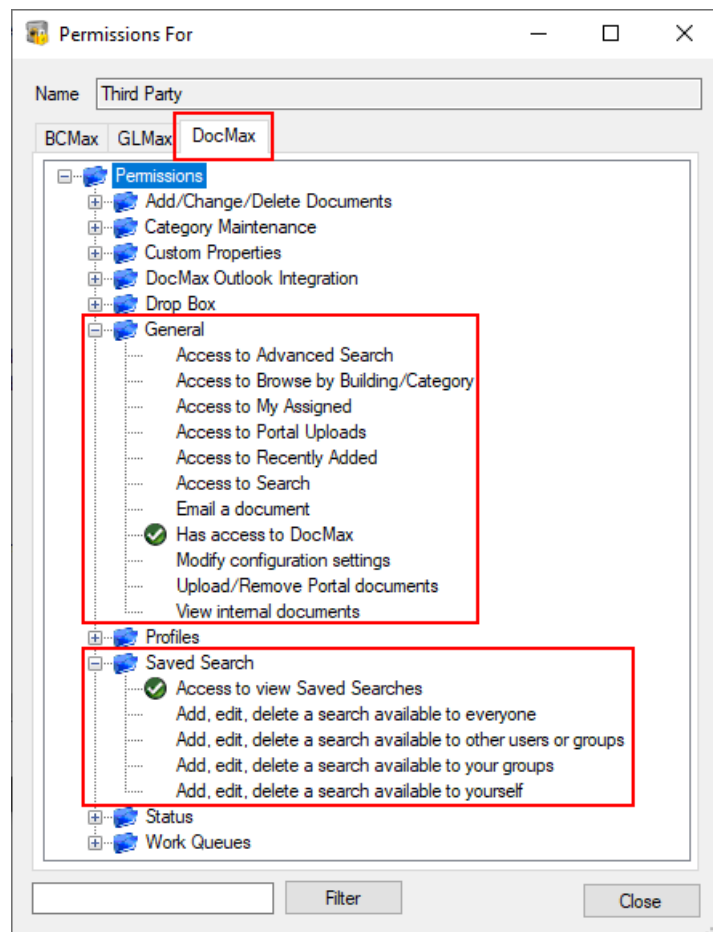
Description
FILE FORMAT
Assigned To
Status
Creditor Name
Invoice Amount
Invoice Number
Account Manager

Search ✔ 170 records displayed

Building Name	Building Number	Title	Description	File Format	Assigned To
STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Areas Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Areas Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Areas Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Areas Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Areas Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Areas Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Livy Notice		StrataMax Stored Report	

The screenshot shows a balance sheet for Strata Plan No. 1521 as at 31 MAY 2024. It compares ACTUAL figures with BUDGETED figures. Key sections include:

- CHARGES FUNDS:** Administration Fund (\$3,934.89 vs \$2,400.00), Sinking Fund (\$2,930.00 vs \$4,000.00). Total: \$6,864.89 vs \$6,400.00.
- COMMON FUND:** Bank Balance Admin Fund (\$4,830.00 vs \$4,830.00), Bank Balance Sinking Fund (\$2,330.00 vs \$4,000.00), Loans & Advances (\$4,830.00 vs \$4,830.00), Other Assets (\$88.40 vs \$88.40), Interest On Overdue Loans (\$50.00 vs \$0.00), Receivable Debtors (\$50.00 vs \$0.00).
- TOTAL ASSETS:** \$17,044.49 vs \$17,148.40.
- LIABILITIES:** Creditors (\$4,750.00 vs \$3,800.00).



This is giving limited access by particular document fields, allowing the external user to enter or select documents based on category, title, or other fields depending on the external user's requirements. If access to a specific building's documents is required, then you will need to configure this in the *Saved Search*, and will need to be changed each time when access to a different building is needed. The below *Saved Search* is only an example of what fields could be suitable for external users.

1. In the *Administration* tab, select the *Saved Searches* option in the list on the left.
2. Click the *Add New* button (green cross) in the ribbon at the top.
3. Type 'External User' or something else appropriate for the external user into the *Name* field.
4. The *Description* field isn't mandatory, but can be useful to explain what the purpose of this search is. This won't be visible anywhere else but this screen.
5. Change the *Available To* drop-down menu to the group that has been set up in the **Security Set** up menu for external users (see [External Parties/Users Group](#) for more info).
 - This will ensure this *Saved Search* will only be available to any users in that security group.

Restrict To	Condition	Value
Building Name	is equal to	Select a specific building from your portfolio or leave it blank if you'd like the external user to be able to select any building
Title	contains	Blank (this field will be specific for each search)
Categories	is any of	Blank (this field will be specific for each search)

Restrict To	Condition	Value
Description	contains	Blank (this field will be specific for each search)
Extracted Text	contains	Blank (this field will be specific for each search)
Added Date	is in the range	Blank (this field will be specific for each search)
Categories	is <u>not</u> any of	Category not included for third party search

6. Once all fields in the *Restrict To* tab have been added, click the *Columns* tab to configure which columns are visible, and in what order they are presented across the screen.
7. Next, click the *Sort Order* tab to apply any sorting preferences that would be useful for the external users.
8. Click the *Save Changes* button (purple floppy disk icon) at the top of the screen, in the ribbon.

Test the visibility and functionality of the *Saved Search* by logging into the StrataMax server as the external user.