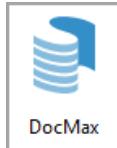


DocMax | Advanced Search and Saved Searches

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

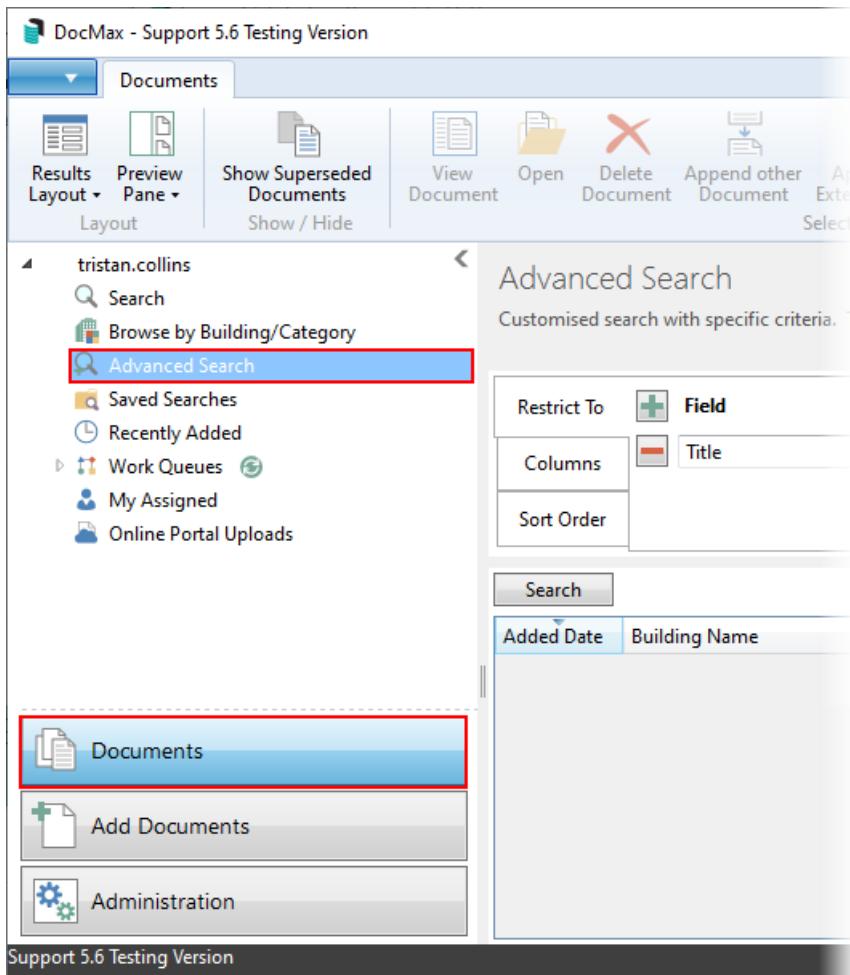
An *Advanced Search* has been designed to give users a more powerful method of locating documents in **DocMax**. If you use the default search options, *Browse by Building/Category* or *Search* without locating the required documents, you can use the *Advanced Search* function.

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.
 - o 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'.
 - o 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:
 - o 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:
 - o 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.
 - o 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.

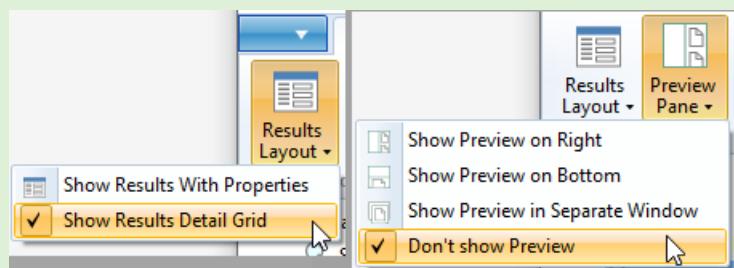
Here is an example of which **Fields**, **Conditions**, and **Values** you could configure for a generic document search.

Restrict To	Field	Condition	Value
Columns	Building Name	is any of	
	Title	contains	
Sort Order	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	

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' tab of a search interface. On the left, there are three sections: 'Restrict To' (with a 'Filter' input field), 'Columns' (listing 'Owner Name', 'Remove From Portal After Date', 'Should Upload For Invoice Hub', and 'Should Upload For Meeting Hub'), and 'Sort Order' (with buttons for 'Add >' and '< Remove'). On the right, the 'Sorted Columns' list contains 'Added Date' (sorted 'Newest First'), 'Building Number' (sorted 'A to Z'), and 'Title' (sorted 'A to Z'). Below these lists is a table with 20 records displayed, showing columns for 'Added Date', 'Building Name', 'Building Number', and 'Title'. The table data is as follows:

Added Date	Building Name	Building Number	Title
14/05/2021	JAS TEST	1J	Recoveries Invoice
05/05/2021	1 FREESTONE DRIVE KEEP	38378S	123
05/05/2021			Test 5
05/05/2021			Test 5
05/05/2021			Test 5
...			

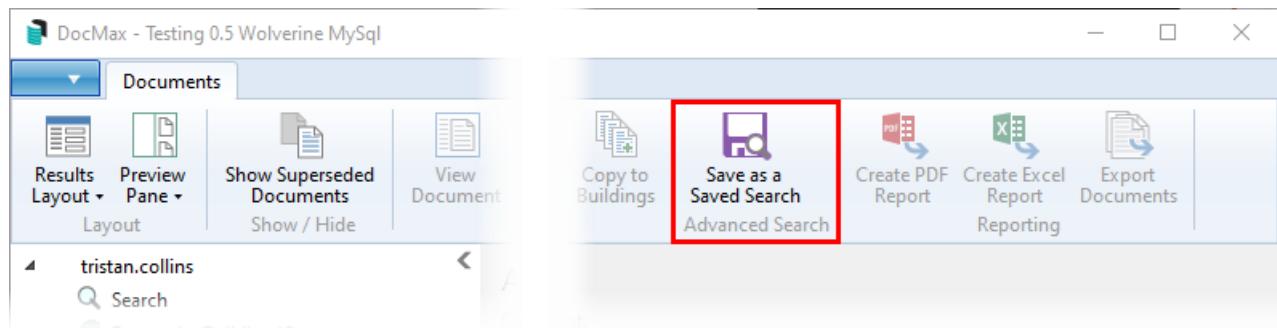
- Add more fields to sort by, by clicking the column name in the *Available Columns* list on the left, then clicking the *Add >* button, which moves the column name to the *Sorted Columns* list on the right.
- Remove columns by selecting the name in the *Sorted Columns* list on the right, then clicking 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.

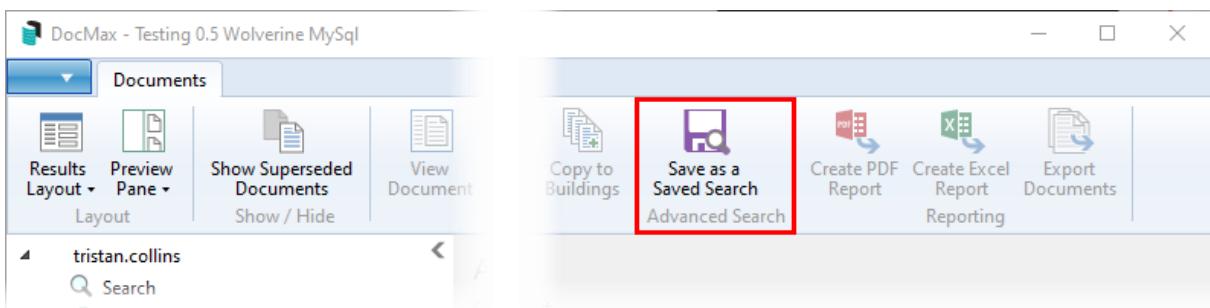


Saved Searches

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.

Exluding 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.

11. Following the *Column* sort order, go to *Sort Order* to apply preferences on the way the results are sorted.
12. 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.

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

1. Select *Advanced Search* to review the document property restrictions that can be configured.
2. Using the *Field* restriction, assign a criteria of restriction. For example: *Creditor* is the field restriction.
3. 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.
4. Leave the *Value* blank as this will be the variable that is used when running the search.
5. Repeat for further fields of restriction.
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 type of documents.
8. 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	Invoice																											
Description	This search can be used to find invoices based off the Invoice Number, Amount & Creditor.																											
Available To	Users																											
Restrict To	<table border="1"><thead><tr><th>Field</th><th>Condition</th><th>Value</th></tr></thead><tbody><tr><td>Building Name</td><td>is any of</td><td></td></tr><tr><td>Creditor</td><td>is equal to</td><td></td></tr><tr><td>Invoice Amount</td><td>is equal to</td><td></td></tr><tr><td>Invoice Date</td><td>is in the range</td><td><input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/></td></tr><tr><td>Invoice Number</td><td>contains</td><td></td></tr><tr><td>Is Building on Invoice Hub</td><td>is equal to</td><td><input type="radio"/> Yes <input type="radio"/> No</td></tr><tr><td>Categories</td><td>is any of</td><td><input type="checkbox"/> Invoices <input type="button" value="X"/></td></tr><tr><td>Extracted Text</td><td>contains</td><td></td></tr></tbody></table>	Field	Condition	Value	Building Name	is any of		Creditor	is equal to		Invoice Amount	is equal to		Invoice Date	is in the range	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>	Invoice Number	contains		Is Building on Invoice Hub	is equal to	<input type="radio"/> Yes <input type="radio"/> No	Categories	is any of	<input type="checkbox"/> Invoices <input type="button" value="X"/>	Extracted Text	contains	
Field	Condition	Value																										
Building Name	is any of																											
Creditor	is equal to																											
Invoice Amount	is equal to																											
Invoice Date	is in the range	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>																										
Invoice Number	contains																											
Is Building on Invoice Hub	is equal to	<input type="radio"/> Yes <input type="radio"/> No																										
Categories	is any of	<input type="checkbox"/> Invoices <input type="button" value="X"/>																										
Extracted Text	contains																											

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
Building Name	is equal to	
Building Number	contains	
Added From	is equal to	BCMax System
Lot	contains	
Lot Account Code	contains	
Email Recipient	contains	
Added Date	is on	<input type="checkbox"/> 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			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

Layout: Results, Preview, 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

Advanced Search

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

Restrict To

Field	Condition	Value
File Format	is equal to	StrataMax Stored Report
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	Inv/Rec			
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
Belle Estate Agent
4/113 Breakfast Creek Rd
NOVOTEL QLD 4000

Date of Notice	17 December 2025
Alt No	1
Lot No	1
Unit Number	1
Control Ent	10
Interest Ent	9

STRATAMAX ONLINE HELP KEEP CTS 1521

Body Corporate and Community Management Act 1997

NOTICE OF CONTRIBUTIONS

Account	Period	Due Date	Amount	Balance	Fee/By	Net Amount
Adviser Fund Special	Testing Period	01/01/2024	\$1,000.00	\$0.00		\$1,000.00
Banking Fund	01/05/26 to 31/07/26	01/05/26	\$100.00	\$0.00		\$100.00
Other - Due Immediately			\$100.00	\$0.00		\$100.00
Alison Smith						

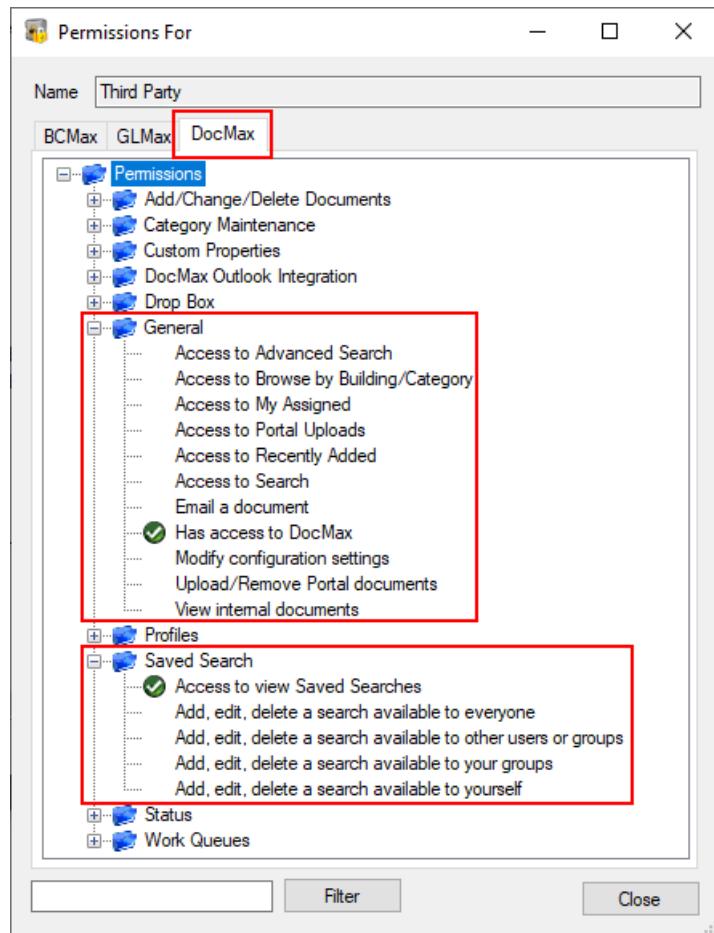
The screenshot shows the StrataMax software interface. At the top, there is a toolbar with various icons for document management: Results Layout, Preview Pane, Show Superseded Documents, View Document, Open, Delete Document, Append other Document, Append External File, Disbursements, Print, Email, View History, Copy to Buildings, Save as a Saved Search, Create PDF Report, Create Excel Report, and Export Documents. Below the toolbar, a sidebar on the left shows a user profile (lana.clark) and navigation links for Saved Searches, Recently Added, Work Queues, My Assigned, and Online Portal Uploads. The main area is titled 'Advanced Search' and contains a search form with fields for 'Restrict To' (set to 'Everyone'), 'Available Columns' (listing 'File Format', 'File Format Id', and 'Original File Name'), and a 'Displayed Columns' list (listing 'File Format', 'Assigned To', 'Status', 'Creditor Name', 'Invoice Amount', 'Invoice Number', and 'Account Manager'). A red box highlights the 'File Format' column in both lists. Below the search form, a table displays 170 records with columns for Building Name, Building Number, Title, Description, File Format, and Assigned To. The 'File Format' column for all records shows 'StrataMax Stored Report'. To the right of the table is a preview of a document titled 'Strata Plan No. 1521' showing a 'BALANCE SHEET' for '1 Main Avenue Herston QLD 4021' as of '30/05/2024'. The document includes sections for 'OWNER & FUND', 'ASSETS', 'CURRENT ASSETS', 'LIABILITIES', and 'CURRENT LIABILITIES'. A red box highlights the 'File Format' column in the table and the 'File Format' entry in the preview document.

Third Party/External Users Saved Search

This type of saved search will allow for external users, such as auditors, to search for specific documents. It is assumed that the external user has already been granted access to your StrataMax, and have been added to the appropriate security group in **Security Setup**, where permissions are set appropriately for third parties. See [External Parties/Users Group](#) for more info.

We also have the [Security Setup & External Parties Remote Access Video](#) which covers the Security Setup process.

Once the group has been set up and the external users have been added to the security group only the following two DocMax permissions should be set to 'Allow' (green tick), whilst the rest should be set 'Inherit' (no icon).



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).
 - o 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.