Report Distribution

Last Modified on 09/04/2024 5:01 pm AEST

Report distribution is the area that delivers report sets that can be tailored for specific purposes. This screen will offer functionality to run single reports for the various roll reports or add to a combined report set that can be saved to run regularly.

This screen will use several owner-designed reports and others as internal users to deliver reports. It is essential to review these areas when applying the report.

These icons will open the *Report Distribution* screen, providing the appropriate recipient list for that type of report. For example, ***Merge Letters*** will offer the 'Owners List' from the Main or 'Other Debtors' from the Sub-Group, and the ***Roll List*** will default to the 'Internal Recipient' list in the Main (based on users in ***Security Setup***)

The *Distribution Method* settings are unique to each area and, when amended, will hold in that particular area for the following distribution. The Report Set option will also include these settings set in each area.

> Please note that the Reports available in Report Distribution have been rewritten. Please see the ***Report Set*** option for other reports that may not be unavailable in this list. The current list will be added and extended as further reports are rewritten and available via the Release Notes for details as they are released.

Settings

Building
This building selector tool can tag multiple buildings and apply standard building filters—for example, by Account Manager or Financial End Month. Remember to clear any building filters that may have been applied after to ensure the next process runs with all buildings as required.

Report Set
Selecting from a pre-configured report set that includes merge letters, attachments, and reports is what this option is designed for. The save and delete icons next to the drop-down selection for the report set will control what action is taken for the selected report set.

Page Numbers
Configuring this setting will include page numbers with a paragraph center position on the merge letter and all attachments.

Consolidate by Contact
This option will consolidate the merge letter and any attachments into one pack for distribution. With this configuration selected, any contact that owns multiple lots will deliver one instance, including all documentation

batched into report order. For multiple buildings, this contact will receive one for each.

+Report

Selecting this button will provide access to various building (building icon), owner (person icon) and global (globe icon) reports that can be added to a report set.

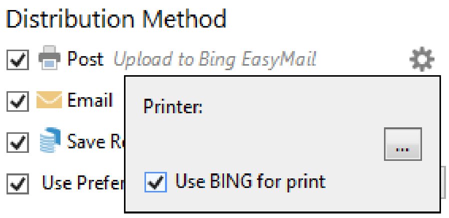
Attachment

This will open an *Add Document* window from DocMax allowing the user to navigate to the attachment, which may be saved in DocMax or added from a folder location.

Post

For all post copies, this will control the printer, including any BING printers. Configuring a different address priority can also be set here; the default is correspondence.

To print to Bing ensure the printer is set to Bing Easy Post API and the option Use Bing for Print is ticked.



Email

The email subject and body can be configured here for all email copies, including email merge fields

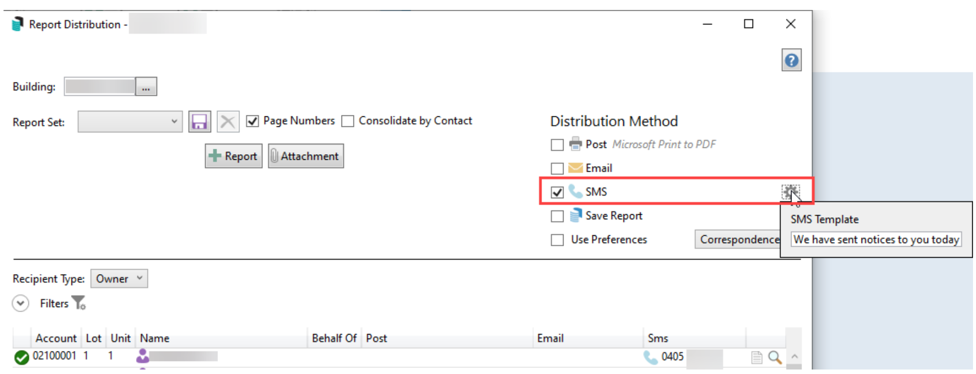
Using BING for email is also set here and is available using the BING API **(charges may apply - contact Bing for further information)**. Tick *Use BING for Email* to send email to BING for processing. Emails sent via Bing will not be in the logs of Communications.

> Please note that the *Use Bing For Email* has a security control setting which should be reviewed in ***Security Setup***.

Changing the default email preference from correspondence is available here.

SMS

If using a third-party SMS service, this can be configured to deliver to those recipients who have a valid mobile number. This is also where the SMS template is set. If this service is not enabled, the SMS distribution method will not be displayed.



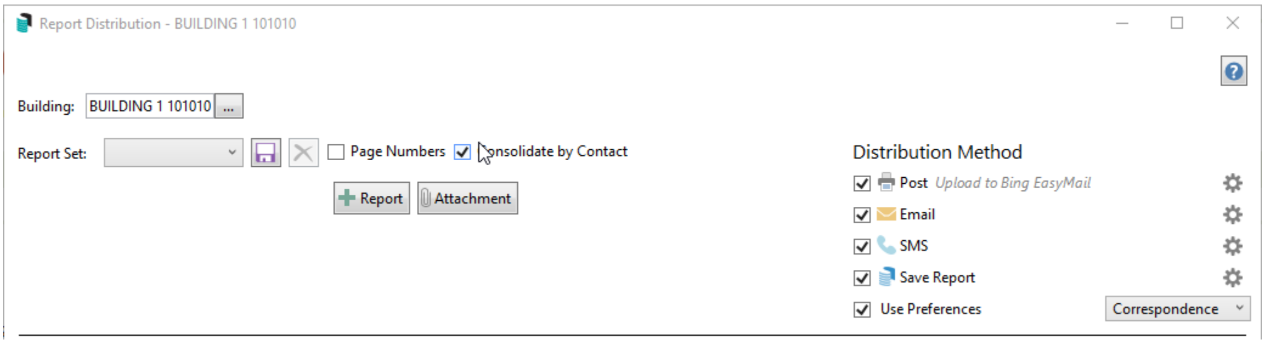
Save Report

The *Save Report* option will save the document and all attachments to DocMax. Checking that a profile has been selected when using this area from the cogwheel is recommended. Select the appropriate profile before generating the documentation to allow the *BCMax System Document* to be added to DocMax.

Use Preferences

With each contact comes their contact preference. This setting will control whether or not these are applied when sending a document and what delivery category to apply. Without the use of preferences, the default will be posted.

Note: the *Title* field in DocMax will reflect the Merge Letter name, and *BCMax System Document* is the *Added From* condition when searching for these documents in DocMax.



Filters

Recipient Type

Who receives the document as a default is where this list will open to the most relevant contacts for that report type. For internal style reports, this list will default to internal based on the Users who have a valid email setup in Security Setup. Merge letters and other owner-type reports will default to the owners. Drop the selection to change to a different recipient type. If using Merge Letters from a Sub-Group, this will default to Other Debtor who are ***Debtor Maintenance*** records.

Committee Member

This filter will allow for a selection of *All, Exclude* or *Only*.

Lot Type

Generating correspondence, if there are accounts set for car or storage spaces, and these are to receive the document set as required.

Duplicate

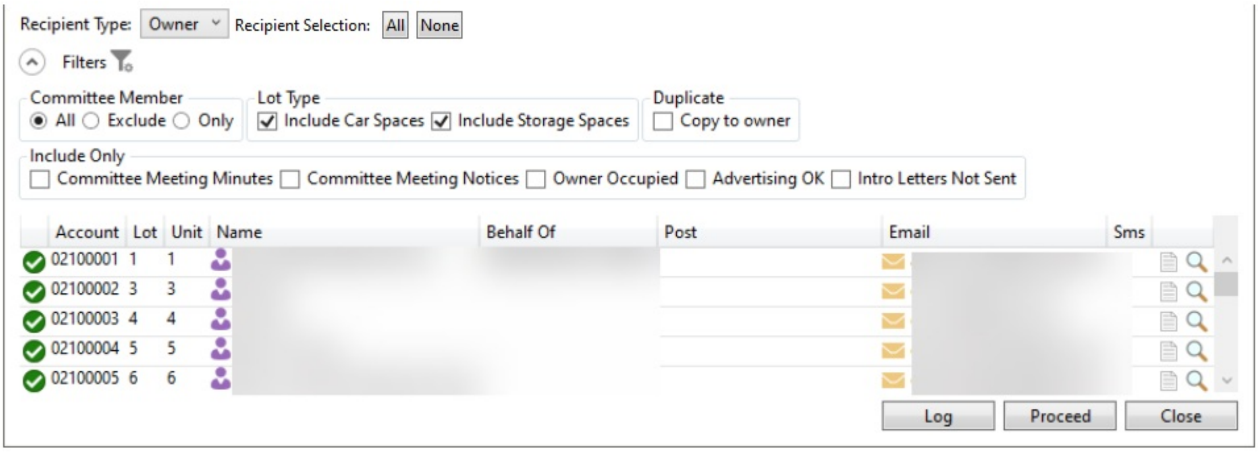
Copy to Owner will allow for a copy to be sent to the Owner when the lot account is configured to have the agent/ mortgagee or other to receive correspondence.

Include Only

Committee Meeting Minutes, Committee Meeting Notices, Advertising OK

Set to send accounts flagged to receive the nominated areas, which can be set via the Roll's *Correspondence* preferences.

Owner Occupied
Set to send accounts flagged *Is Owner Occupied*, which can be set via the ***Roll*** within each contact.
Intro Letters Not Sent
For any owners who are yet to receive the StrataMax Introduction letter, set this to send the StrataMax Intro Letter (e.g. available in Change of Ownership) to those who have not received it yet.



Icon Guide

 Shows Report Data for the individual contact. This document or report contains Roll contact card merge fields and is specific to the lot.

 Shows Report Data for the selected account. This type of document or report is specific at the lot level and does not rely on Roll contact cards.

 Shows Report Data across all buildings. This type of document or report does not contain roll-specific merge fields.

 Shows Report Data for selected buildings. This type of document or report does not contain roll-specific merge fields.

Email Template Setup

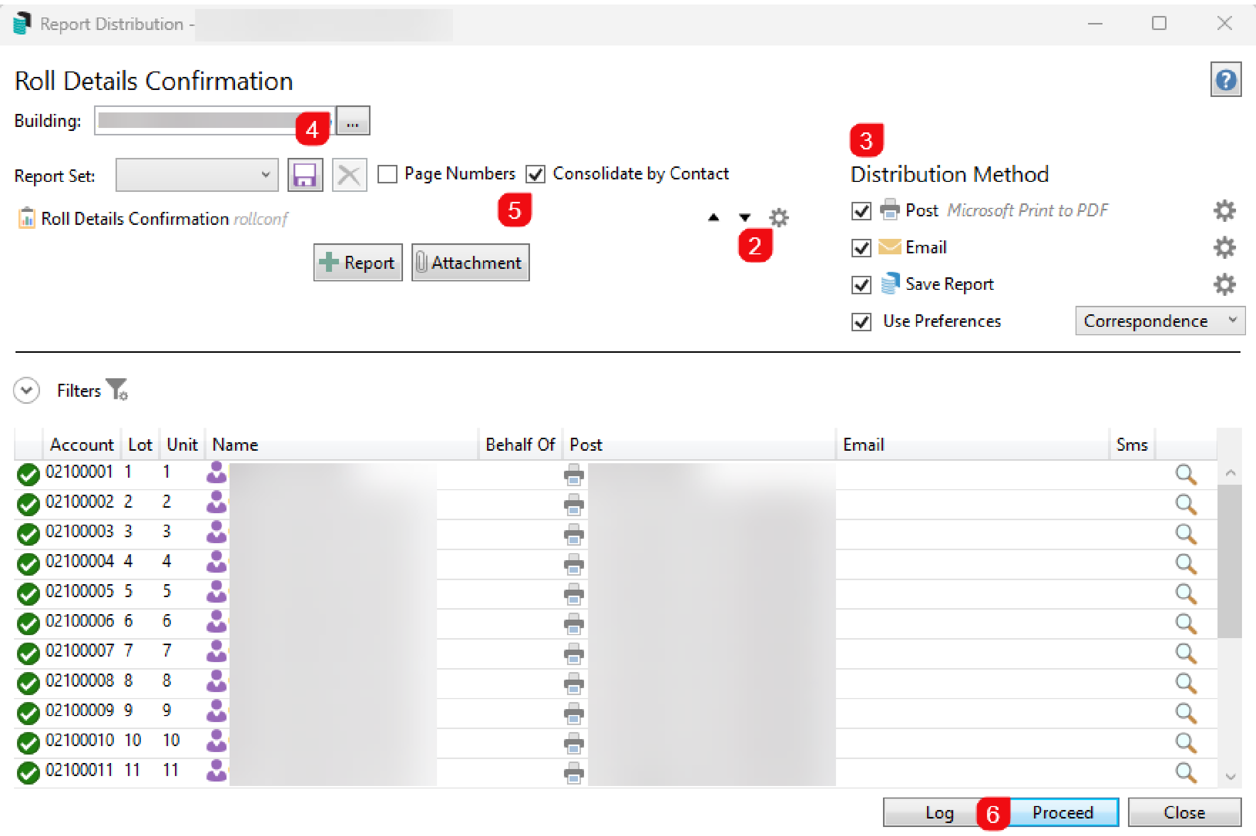
Please refer to the ***Email Template Manager*** article to learn how to manage email templates.

Example of Lot-Specific Report

Lot-specific reports will include the recipient lists to default to the Owners and are designed to report Owner information. Examples may consist of ***Roll Details Confirmation***, ***Roll Form*** and ***Update Advice***.

The ***Roll Form*** will default to the Internal User recipient list. Individual ***Roll Forms*** can also be produced if they are for an Owner by changing the recipient type. Noting that this will be sent to that recipient.

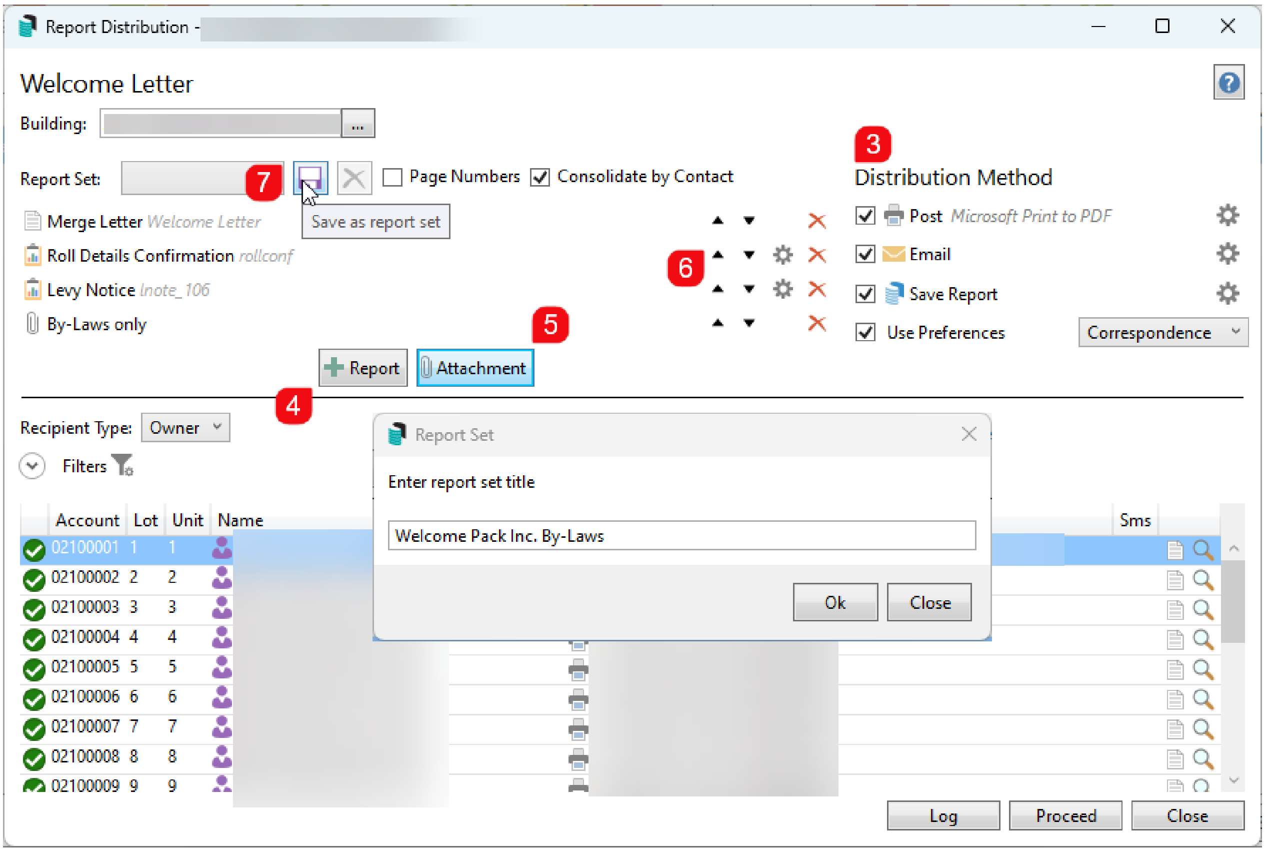
1. Search or select the appropriate report.
2. The report name will be confirmed in the top right corner. Select the cogwheel to set and check the template and configuration options.
3. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post* (print) *Email* and *Save Report* (DocMax). Set as required from each cogwheel.
4. If multiple buildings are to be included, tag the required buildings using the *Building* field.
5. If running for a single building, and there are multiple of the same contact, *Consolidate by Contact* can be ticked to allow one delivery based on preferences.
6. Select either *Proceed* or select the *Magnifying Glass* (single contact selection) icon to preview the report. (Use Ctrl + X to untag all; for more keyboard shortcuts, click here)
7. The preview window will display the report, the distribution options selected, and the recipient list on the left-hand side. Click *Proceed* to send the report to the nominated recipients.



Creating a Lot-Specific Report Set

Creating lot-specific report sets can help produce a sub-set of reports, documents and attachments for regular use. The Distribution method set here will be the default pre-set and should be considered when creating a set. Examples may include Welcome Packs or Nomination Forms.

1. Search or select the appropriate report or ***Merge Letters***.
2. The report name will be confirmed in the top right corner. Select the cogwheel to set and check the template and configuration options.
3. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post* (print) *Email* and *Save Report* (DocMax). Set as required from each cogwheel.
4. Click *+ Report* and add merge letters or reports.
5. Click *Attachment* to add an attachment from ***DocMax*** or +Add New Folder Location to add from the network folder.
6. Once all merge letters and reports have been individually selected, use the navigation buttons to apply a sort order to each report/document, if required.
7. Click the *Save* icon and enter the *Report Set* title. Click *OK* to save this to use again.



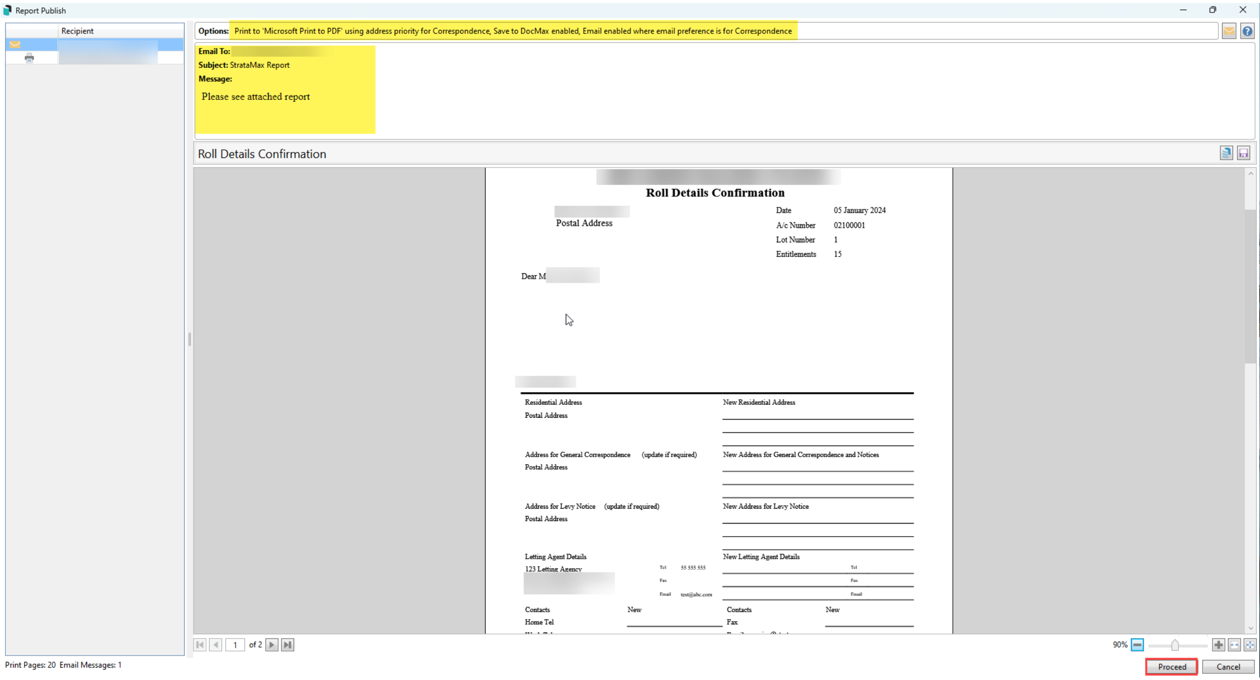
Distributing a Lot-Specific Report Set

Any configured Report Set can be distributed to a Lot-Specific contact where required. Each of these areas can include its own Report Set and should be accessed from the menu within which it has been set.

1. Search or select the appropriate report or ***Merge Letters*** from Main or Sub-Group.
2. From the *Report Set* drop-down box, select the required type.
3. If multiple buildings are to be included, tag the required buildings using the *Building* field.
4. If running for a single building, and there are multiple of the same contact, *Consolidate by Contact* can be ticked to allow one delivery based on preferences.
5. Check the *Distribution Method* options and set them differently if required.

NOTE: Any adjusted settings here will hold for the following distribution process.

6. If there are single one-off reports, click *+Report* to add additional reports and merge letters, similarly for *Attachment.* Add as needed.
7. Select either *Proceed* or select the *Magnifying Glass* (single contact selection) icon to preview the report. (Use Ctrl + X to untag all; for more keyboard shortcuts, click here)
8. From this *Report Publish* window, click *Proceed* to finalise.



Example of Internal Report

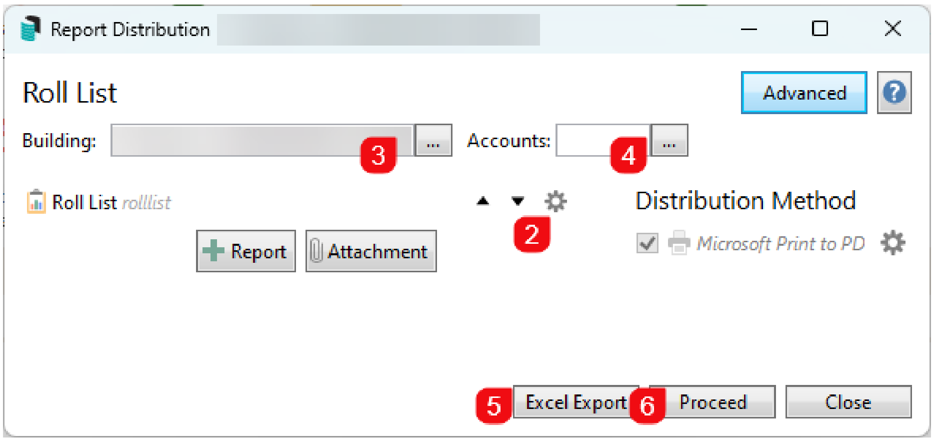
Reports designed for internal reporting can assist with quick checks on various StrataMax data. These menus include ***Roll List***, ***Debtors List***, ***Entry Report***, ***Plan Report***, and ***Secondary Debtors List***. They are generally used to check lot and building information, including contact information for these areas.

Simple Mode

Internal reports can be produced in simple or advanced mode. Advanced mode will show all options in the Report Distribution screen, while Simple mode will display a smaller screen with reduced options to allow for quick report production. The steps below are for the Simple mode. To switch to Advance mode, click *Advanced*.

1. Search or select the appropriate report.
2. The report name will be confirmed in the top right corner. Select the cogwheel to set the template and configuration options.
3. If multiple buildings are to be included, tag the required buildings using the Building field.
4. If selected accounts are required only for the report, click *Accounts* and tag the associated accounts.
5. If the report is to be exported to Excel, click *Excel Report*. This will create a workbook ready for further Excel review.
6. Click *Proceed* to produce the report to screen and then select *Proceed* from the preview window.

NOTE: The Email, Save to DocMax and Save icons are available if preferred.

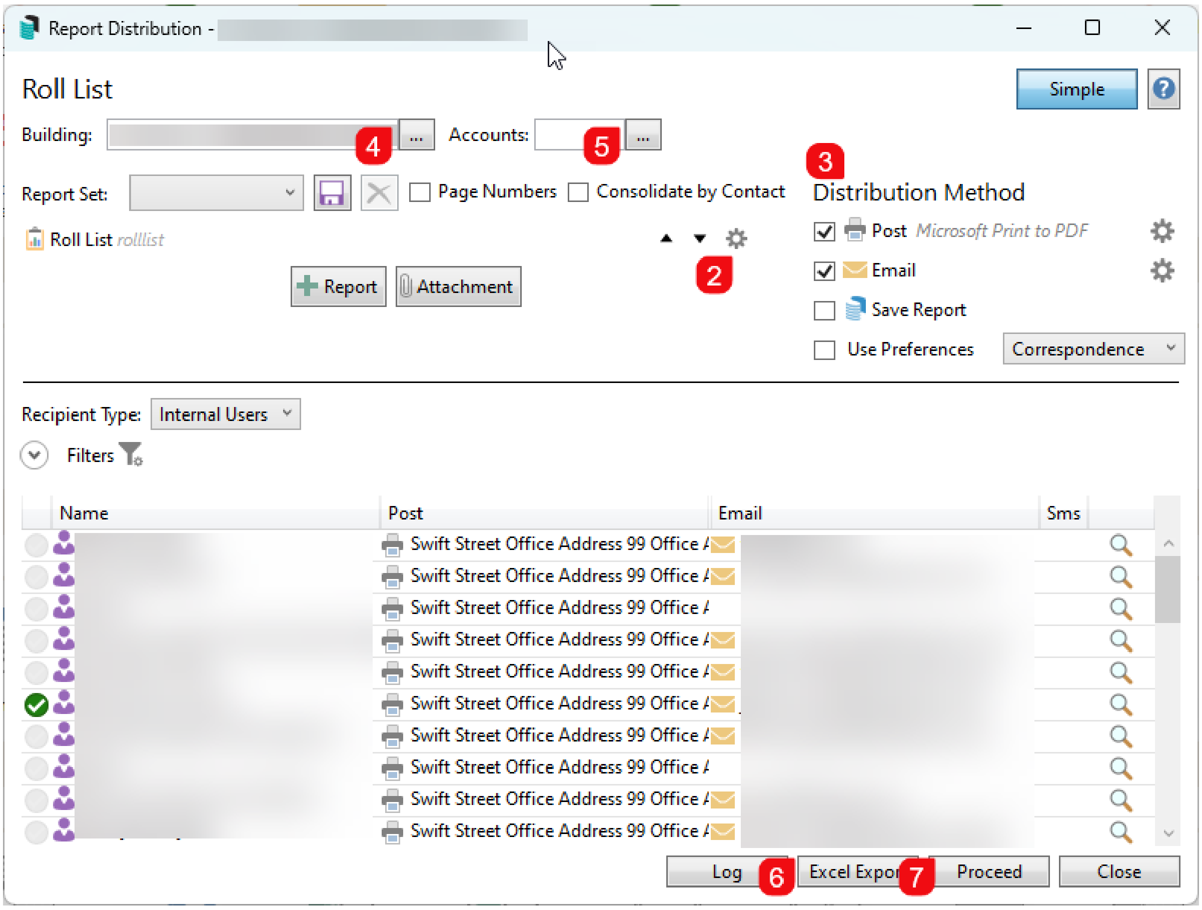


Advanced Mode

Advanced mode will show all options in the Report Distribution screen, while Simple mode will display a smaller screen with reduced options to allow for quick report production. The steps below are for the Advanced mode. To switch to Simple mode, click on the Simple button.

1. Search or select the appropriate report.
2. The report name will be confirmed in the top right corner. Select the cogwheel to set the template and configuration options.
3. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post* (print) *Email* and *Save Report* (DocMax). Set as required from each cogwheel.
4. If multiple buildings are to be included, tag the required buildings using the Building field.
5. If selected accounts are required only for the report, click *Accounts* and tag the associated accounts.
6. If the report is to be exported to Excel, click *Excel Report,* and this will create a workbook ready for further Excel review. This file can be saved and used where required OR:
7. Select either *Proceed* or select the *Magnifying Glass* (single contact selection) icon to preview the report.
8. From the preview window, select *Proceed* to send the report via the set *Distribution Method.*

   NOTE: The Email, Save to DocMax and Save icons are available if preferred.

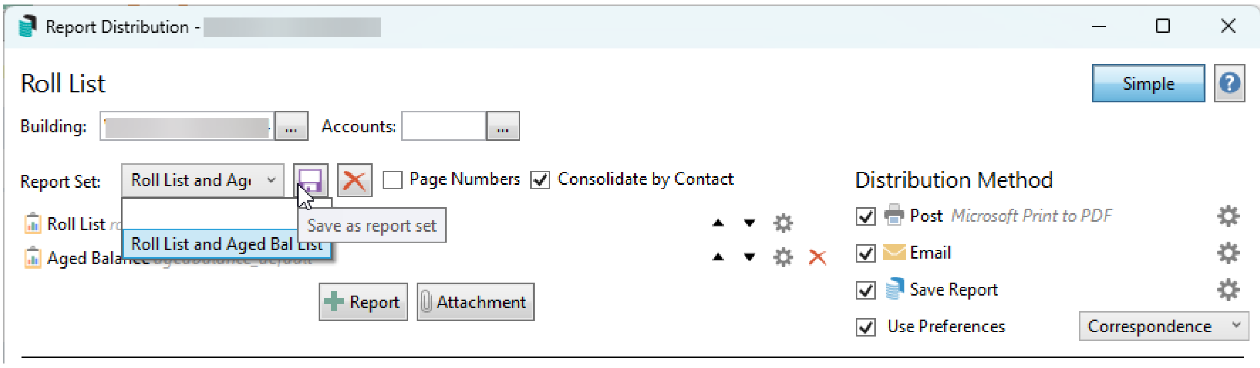


9. The *Distribution Method* (Options) will be displayed from the *Report Publish* preview window, including the email body and a document preview (and any attachments).
10. From this *Report Publish* window, click *Proceed* to distribute via the set distribution method or use the *DocMax* icon to save to DocMax or *Save* icon to save to a network location.

Creating an Internal Report Set

Creating an internal report set can assist with reporting various areas and is a transition of what is available in the Global Report Sets. This information can quickly report Bank Reconciliation Reports, Financial Statements, Creditor Balances, Aged Balance Lists and Building Information. Not all reports are available. However, an extensive range of reports can be added to this area.

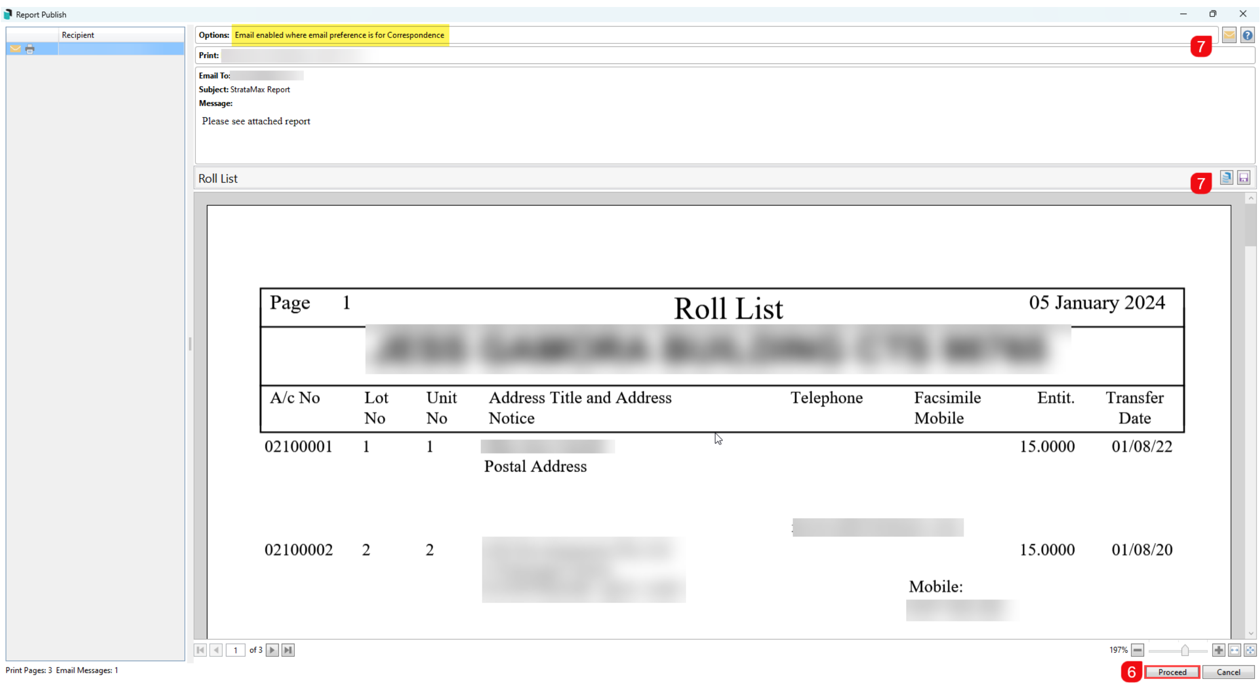
1. Search or select any of the internal reports using the *Report Distribution* screen.
2. Click *+ Report* and select these reports OR Merge Letter to add to the current distribution.
3. If any attachments are required, click *Attachment* and navigate to where the document has been saved in *DocMax* OR *Add New Folder Location.* Click *Select Document* to add this document. Repeat for any further documents.
4. Use the up and down arrows to change the order of documents and reports if there are multiple.
5. Click *Save* and give the Report Set a description (30-character limit). Click *OK*.



Producing an Internal Report Set

Internal Report sets can be produced in PDF versions, and if all are available in Excel format, they can be exported to Excel. For any documents that are not available to do this, there will be a message to confirm that this is not possible.

1. Search or select any of the internal reports using the *Report Distribution* screen.
2. From the *Report Set* drop-down field, select the required Report Set.
3. If page numbers are required against each page for all reports, tag *Page Numbers*.
4. If there are single one-off reports, click *+Report* to add additional reports and merge letters, similarly for *Attachment.* Add as needed.
5. Click *Proceed.*
6. From this *Report Publish* window, click *Proceed* to finalise. The distribution method for the internal user will be applied and highlighted below.
7. Click *Save* to save to a network location, or click the *Email* icon to send via email.



Attachments

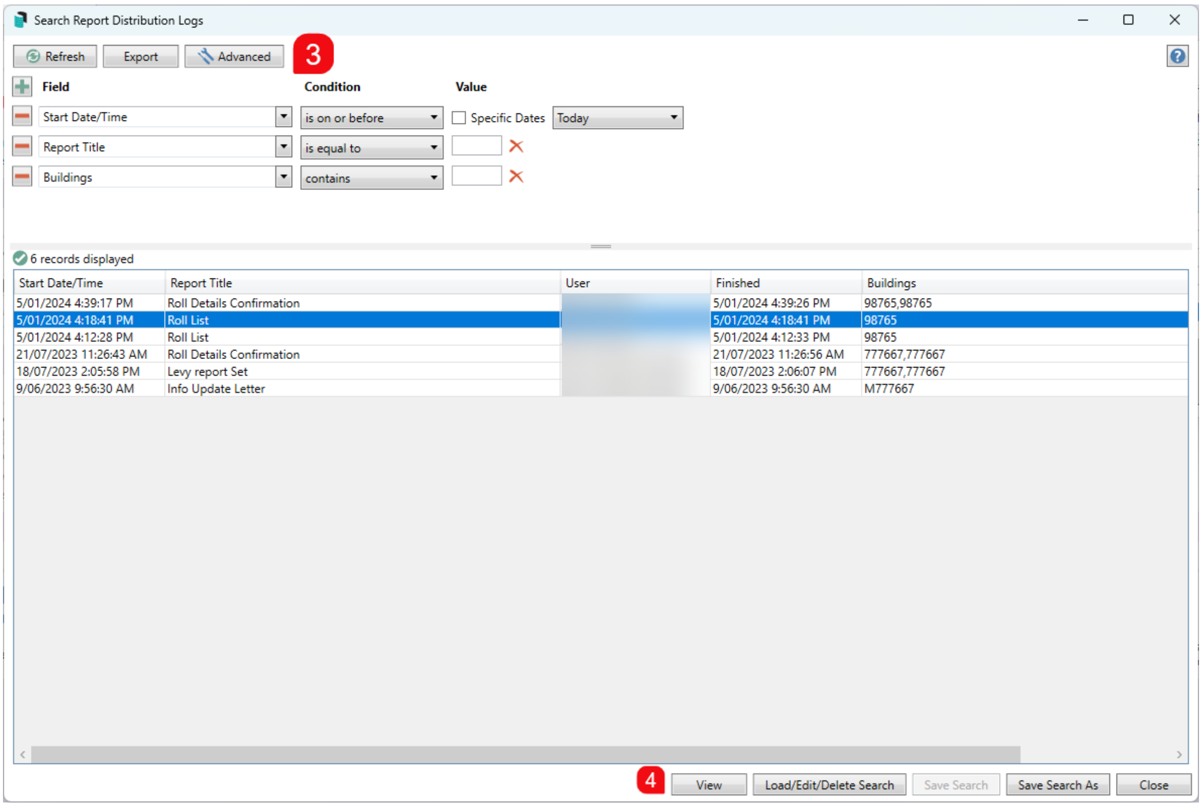
Attachments can be created using any report distribution screens, which mainly work well with Merge Letters. The below instructions refer to how to add just an attachment type of document.

1. Search or select ***Merge Letters*** from Main or Sub-Group
2. Click *Cancel* to the Report Selection screen.
3. Use the Building Selector tool for multiple buildings and tag buildings as needed.
4. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post* (print) *Email* and *Save Report* (DocMax). Set as required from each cogwheel.
5. Click Attachment.
6. From the *Select Document* window, navigate to where the attachment is located, either in DocMax.
7. Or from the *folder location* if the document has been saved in a network location.
8. Click *Select Document* to attach this document.
9. Repeat for any other document.
10. Click *Proceed*.

Log

The log is a powerful tool that will assist with locating previously distributed items. This will include a date and time stamp, as well as the user information. This area can also be used to re-distribute any requested information. This area will report all sent items from all menus that Report Distribution is used. If used from an internal report, this area will need the mode to be set to *Advanced*.

1. Search or select the appropriate report or ***Merge Letters*** from Main or Sub-Group
2. Click *Log*.
3. Refer to the fields of restrictions and apply as needed. This can be saved as a search for later use by clicking *Save Search*
4. Once the distribution has been located, click *View* to see the original reports and documents.



5. Click *Proceed* from the Report Publish window to resend the distribution per the initially applied preferences. This will be resent to all recipients in the pack.
6. Select the contact from the Recipient area for a single owner in a pack and click *Email* to open the *Compose Email* screen. Click the *Too* button to select the owner from the recipient list. Click *Select* to add this email address.