Report Distribution

Last Modified on 01/06/2026 4:37 pm AEST

Report distribution is the area that provides report sets 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 for 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 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 available 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.

Report Distribution Overview

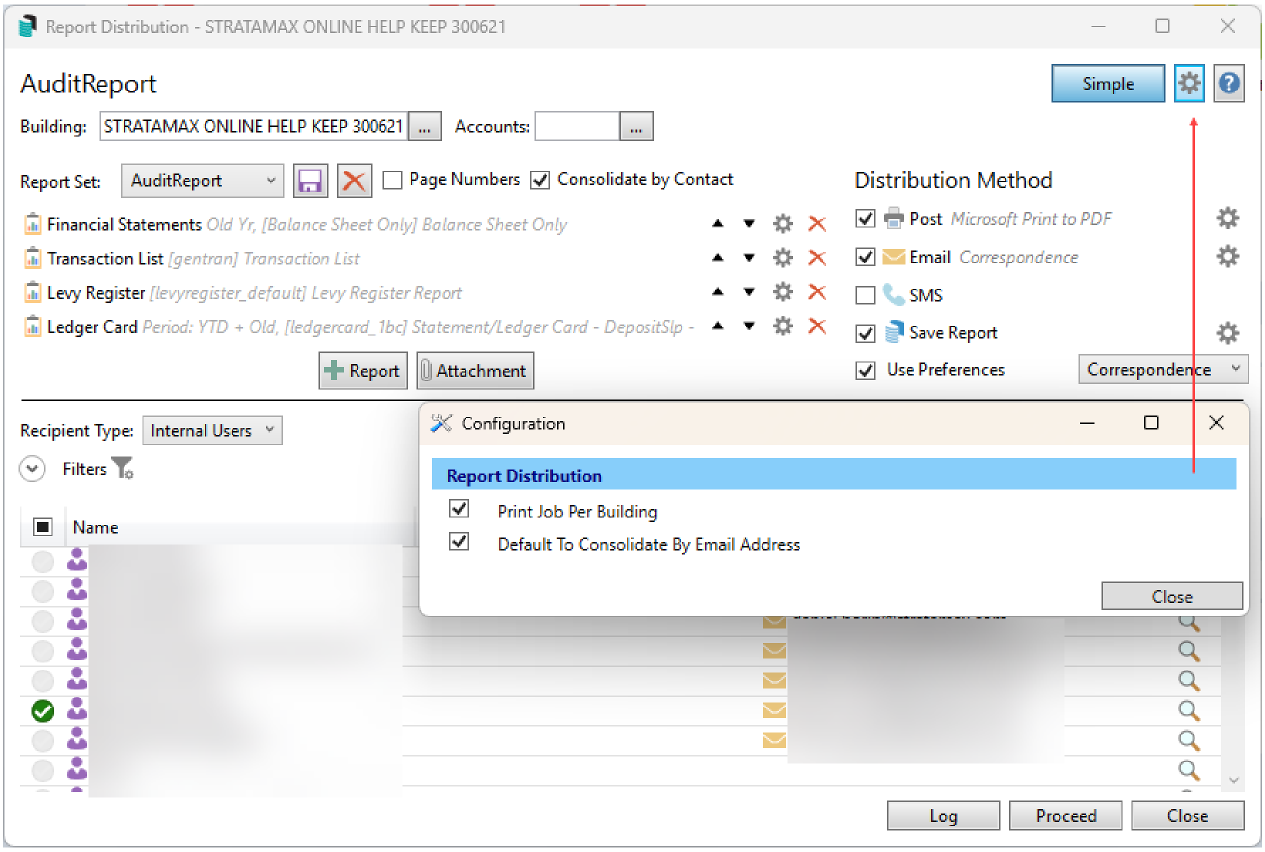
This section of the article describes the different main buttons, fields, and tick boxes in the top left of the 'Report Distribution' window. The 'Distribution Method' tick boxes are explained in the next section down.

1. *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 the buildings required.
2. *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.
3. *Page Numbers:* Configuring this setting will include page numbers with a paragraph centre position on the merge letter and all attachments.
4. *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.

5. *+ 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.
6. *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.
7. *Up / Down arrows:* Use these to change the order of documents and reports.
8. *Report / Document Cogwheel:* This opens the 'Configuration' window for that specific document or report.
9. *Red Cross / X:* Removes the report or document from the window so it won't be produced or sent.

When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.



Consolidate by Email Address

This option allows notices for multiple accounts that share the same email address to be sent in one email with separate attachments. This can reduce duplicate emails when the same email address is used for more than one account.

For example, if an agent manages several lots in a building and notices are set to be emailed, Report Distribution can be configured to send all notices in one email as separate attachments. A record will be added to ***DocMax*** and the ***Roll*** for each account.

For the email subject line, unique subject lines will be combined. It is recommended not to use merge fields in the subject, as this could make the subject too long and exceed email character limits. It is recommended that email templates be reviewed before using this setting.

Please note that the *Report Distribution* screen must be closed and reopened for this setting to take effect. When set, this configuration applies across all Report Distribution screens and will display from the preview window a record for each receipient and only one delivered in the ***Communication*** log with all attachments included on the one email.

This feature can be applied as a default configuration or as a one-off configuration.

Default configuration

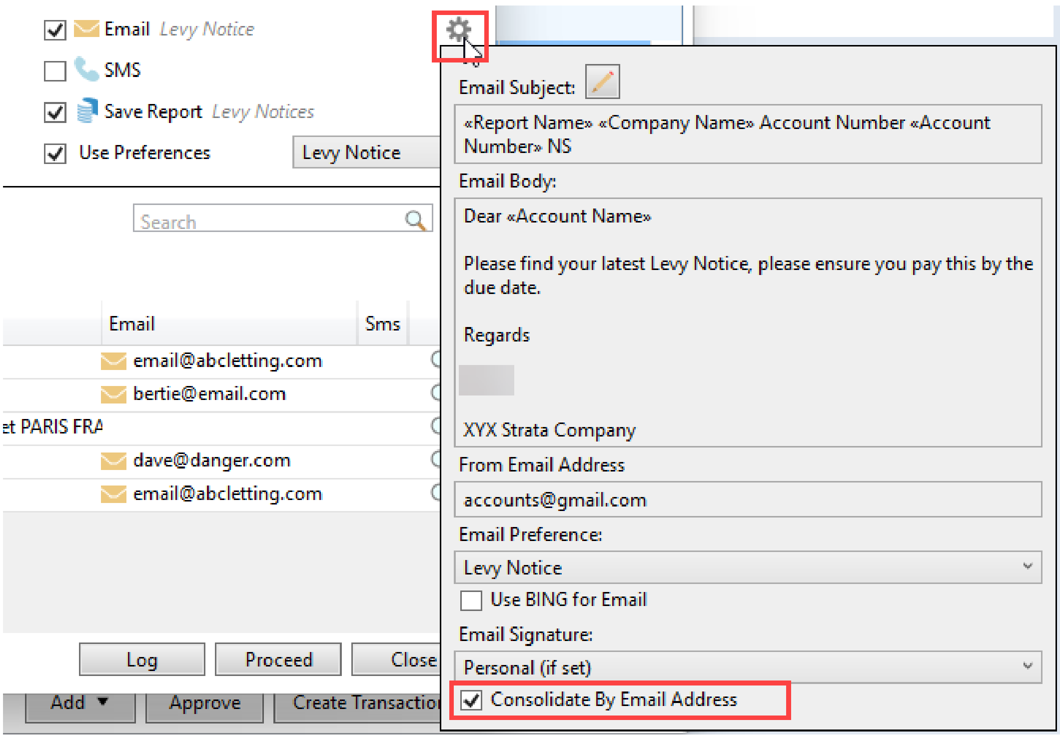
1. Search or select any window that uses that *Report Distribution*.
2. Click the *Configuration* cog icon.
3. Enable *Default to Consolidate by Email Address*

When enabled, emails for multiple accounts sharing the same email address will be sent as one consolidated email with separate attachments by default.

One-off configuration

If the default setting is not enabled, this option can still be applied for a single distribution.

1. Click the *Email Template Configuration* cog icon.
2. Locate the *Consolidate by Email Address* setting at the bottom of the configuration screen.



This setting will send all notices to the same email address as a single email with separate attachments.

Please note that this setting is not persistent and must be configured each time the feature is required. If the default setting is not enabled, the one-off setting will reset after each distribution.

If *Consolidate by Contact* is enabled, notices will be consolidated into a single document rather than multiple attachments. Consolidation by email address applies only to email distributions.

For the email body, only the content from the first notice email body will appear in the email. For example, if levy notices for two lots are sent together, the details shown, such as merge fields, will come from the first lot in the report.

Distribution Method Settings

This section of the article goes into detail about each of the tick boxes under the 'Distribution Method' heading.

Post

For all post copies, this will control the printer, including any BING printers, and where you can access the Bing Mail Settings. The currently configured printer will be displayed. To print to Bing, ensure the printer is set to 'Bing Easy Post API' and that *Use Bing for Print* is ticked.

Email

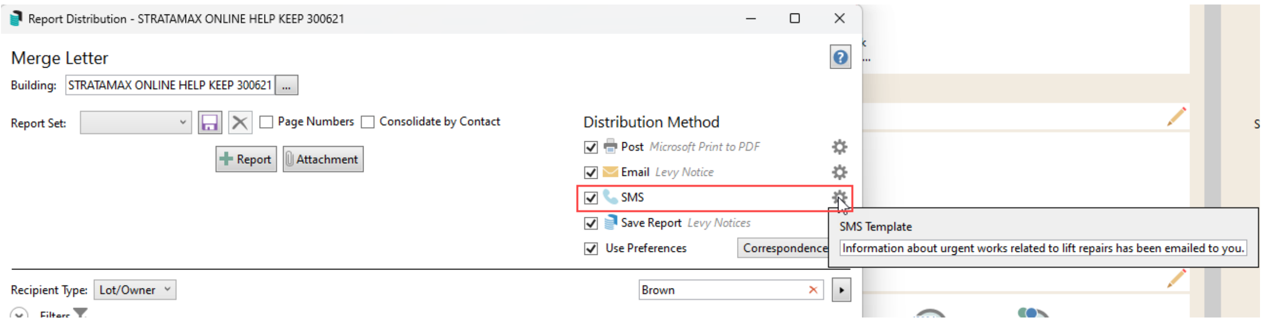
The *Email Subject*, *Email Body*, *From Address*, and *Email Delivery Preference* are configured here for all email copies, including email merge fields. The current email delivery preference for the recipients is displayed.

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

> Please note that the *Use Bing For Email* has a permission in ***Security Setup***.

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 (DocMax)

The *Save Report* tick box will save the document and all attachments to ***DocMax***. The current selected profile (if selected) will be displayed on screen too. Select the appropriate profile before generating the reports or documents to allow the *BCMax System Document* to be added to ***DocMax***.

Use Preferences

Each contact has their own delivery preference. This tick box controls whether or not to use the contact's preferences when sending a document, and the drop-down controls which delivery preference to adhere to. Without using preferences, the default will be posted.

> The *Title* field in ***DocMax*** will reflect the document or report name, and *the BCMax System Document* serves as the *Added From* condition when searching for these documents in ***DocMax***.

Recipients & Filters

The *Recipient Type* drop-down menu will determine who receives the report or document. By clicking the drop-down menu you can select a different recipient type.

- 'Lot/Owner' is selected by default when merge letters and other owner-type reports are being sent. This recipient type will observe the different contacts in the ***Roll*** and depending on if the *Use Preferences* box is ticked under the 'Distribution Method' section, it will change the recipient list - how and who it's sent to. More filters are available for this recipient.
- 'Other Debtor' recipients are in a Sub-Group, who are in ***Debtor Maintenance***. More filters are available for this recipient.
- 'Letting Agent' will observe any lettings agents that are recorded in the ***Roll.*** No filters are available for this recipient.
- 'Owner' will observe owners only in the ***Roll*** and will not observer any letting agents or other contact types. No filters are available for this recipient.
- 'Tenant' will observe any tenants that are recorded in the ***Roll.*** No filters are available for this recipient.
- 'Creditor' will observe any creditor that are recorded in the ***Creditor Maintenance***, including any that are hidden*.* No filters are available for this recipient.
- 'Office Bearer' refers to committee members in ***Office Bearers***. More filters are available for this recipient.
- 'Applicant' observes contacts in ***Applicant Maintenance***.
- 'Resident' will observe any contacts in the ***Roll*** that reside in a lot. This will be tenants and any owners that have the *Is Owner Occupied* tick box selected in the 'Change of Details' screen. More

filters are available for this recipient.

- For 'Internal Users' this will display the Users who are set up in ***Security Setup***.

Committee Member radio buttons are only available when the 'Lot/Owner' is selected in the *Recipient Type* drop-down menu, and will determine how to treat committee members.

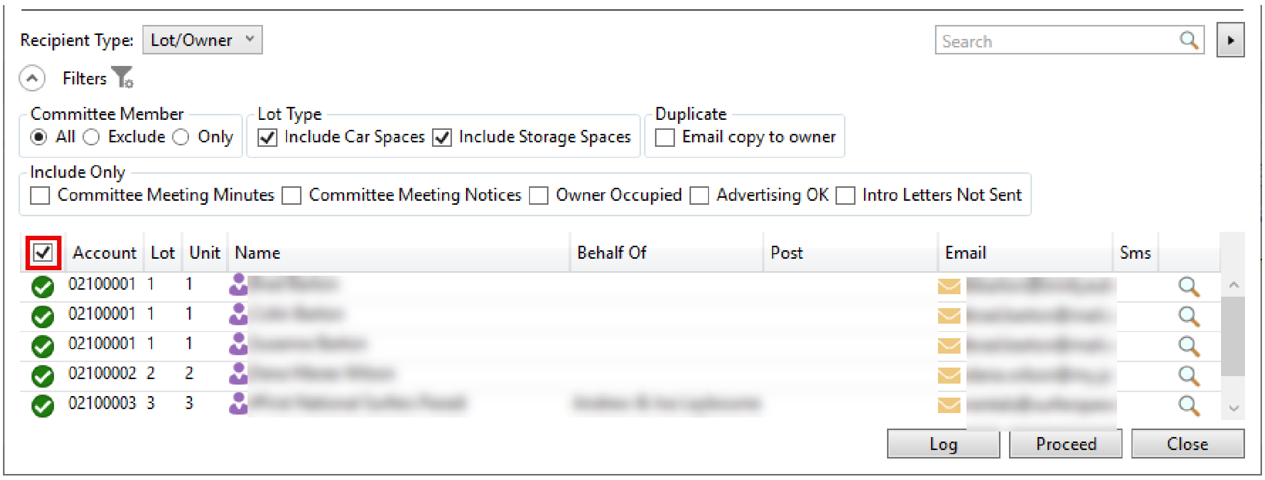
- *All:* Will include all owners or lot contacts, regardless of whether they are a committee member or not.
- *Exclude:* Will exclude committee members from the list of recipients.
- *Only:* Will only include committee members in the recipient list.

Lot Type radio buttons are only available when the 'Lot/Owner' is selected in the *Recipient Type* drop-down menu, and will determine whether or not other lot types, Car Space and/or Storage Space, are included in the recipient list.

Duplicate has the *Copy to Owner* box. This can be ticked so that the owner receives a copy of the report or document. This applies specifically when the lot contains an agent, mortgagee, or other contact type in the ***Roll*** that has been configured to receive the lot's correspondence or levy notice - i.e. when the *Send Correspondence to Agent, Mortgagee or Other* box is ticked, see *Roll Correspondence Preferences* for more details.

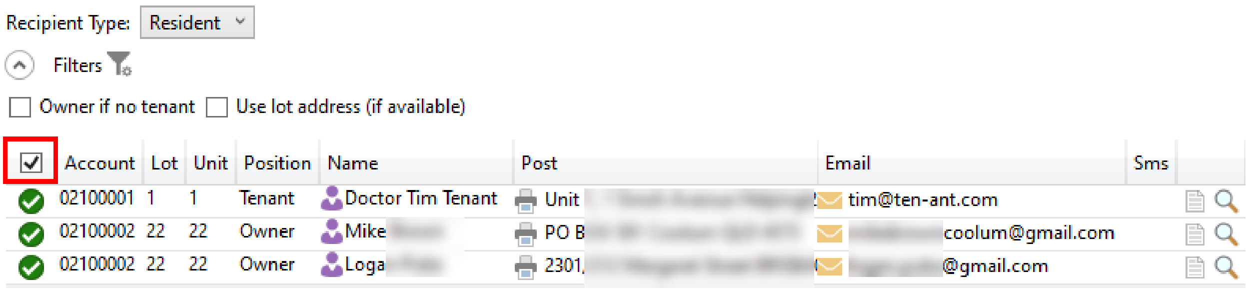
Include only tick boxes and observe various settings in the ***Roll*** screen.

- *Committee Meeting Minutes, Committee Meeting Notices,* and *Advertising OK:* Refer to the corresponding tick boxes found in the 'Edit Correspondence Preference' window. See *Roll Correspondence Preferences* for more details.
- *Owner Occupied:* Observes the *Is Owner Occupied* box, which is configured for each contact, accessed by editing the contact details in the ***Roll*** screen. See *Contact Change of Details* for more info.
- *Intro Letters Not Sent:* Ticking this box will filter the list to those owners who have not received the StrataMax Introduction letter. This is useful if you want to send the StrataMax Intro Letter manually instead of sending it during a *Change of Ownership*.

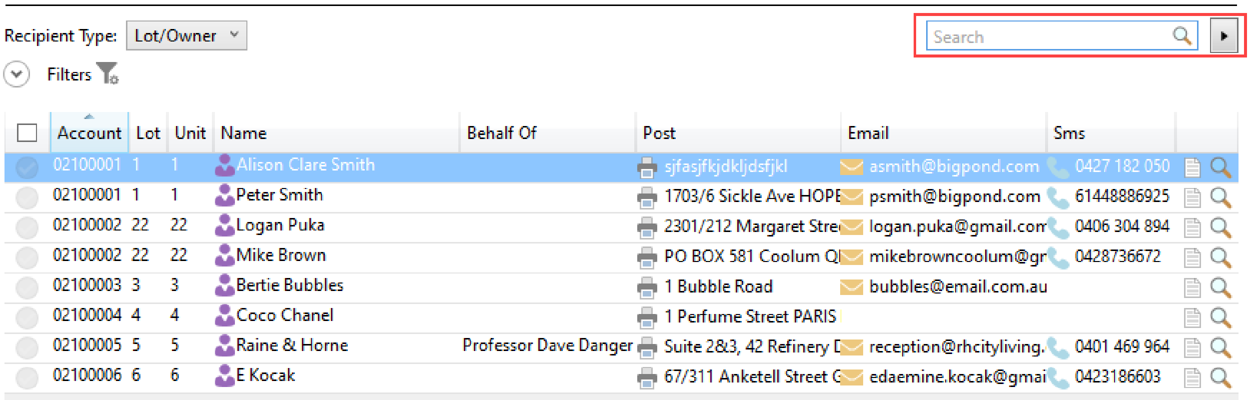


Select all is a tick box on the far left of the header of the recipient list table, and is for easily selecting /

tagging or removing all recipients in the list. The same function as the keyboard shortcuts *Ctrl+A* and *Ctrl+X.*



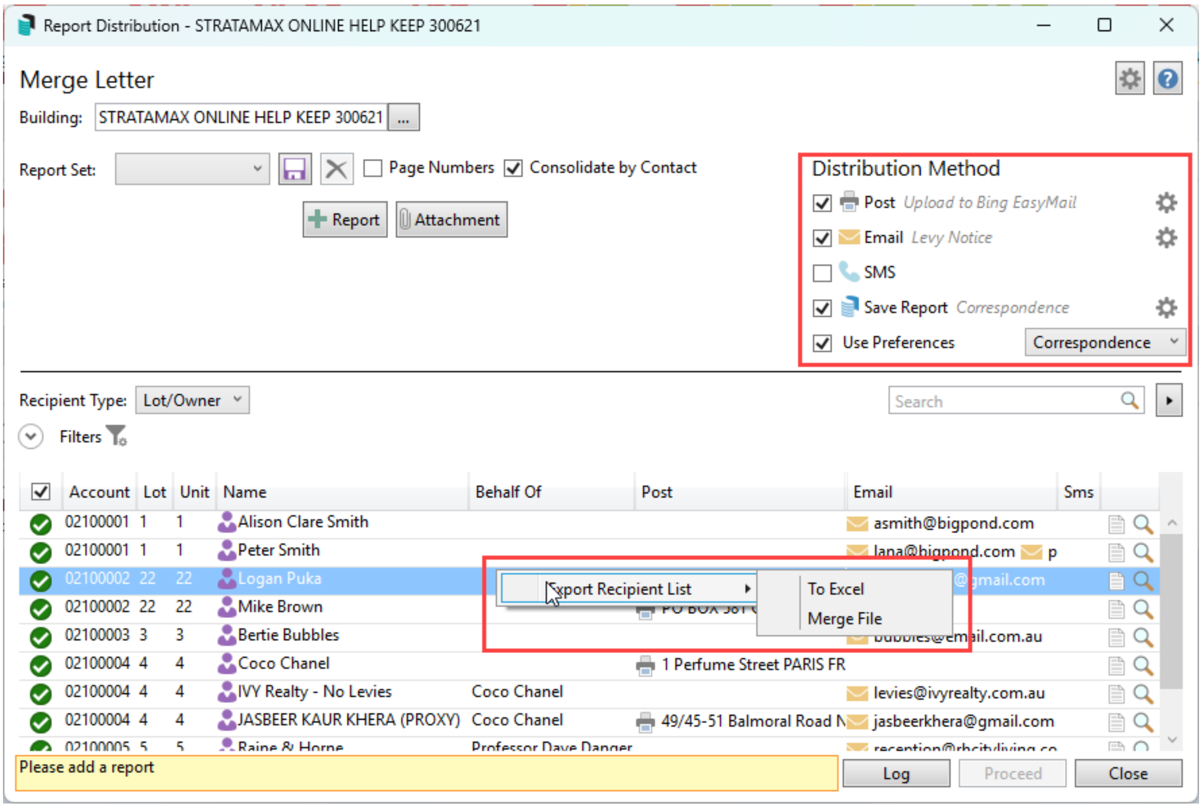
Search is available for larger lists and can have the recipient details entered (except the 0210000X record), which will highlight the record for tagging.



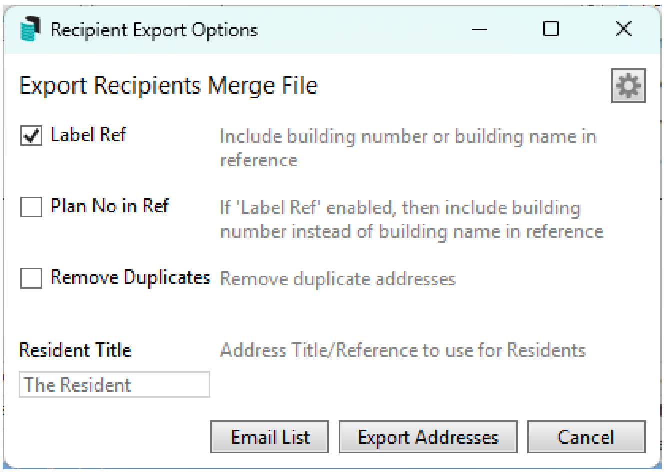
Recipient List Export

To export the recipient list for use in a third-party application, such as Microsoft Word, follow the instructions below to generate the list. Only tagged accounts will be exported into the list.

1. Search or select ***Merge Letters***.
2. Click *Cancel* on the Merge Letter list.
3. Review the Distribution Method and tag the appropriate options.
4. The default recipient list will be the Lot/Owner type. Adjust if required.



5. Right-click and *Export Recipient List > To Excel* OR *Merge File* for a text document version. If using the Merge File option, there are other fields/ options that can be controlled for the file output as per below.



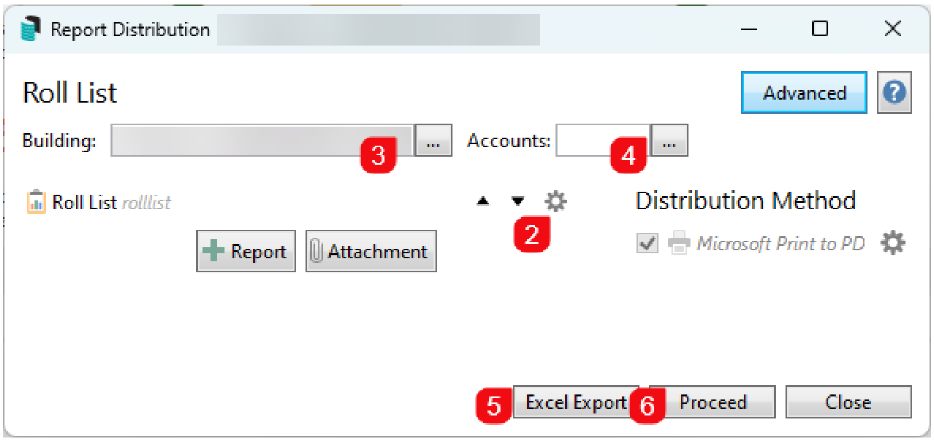
6. Save the file in a known location.

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 Advanced 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. When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.
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 for a single building, click*Excel Report.* This will create a workbook ready for further Excel review.
6. Click *Proceed* to produce the report to the screen and then select*Proceed* from the preview window.

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

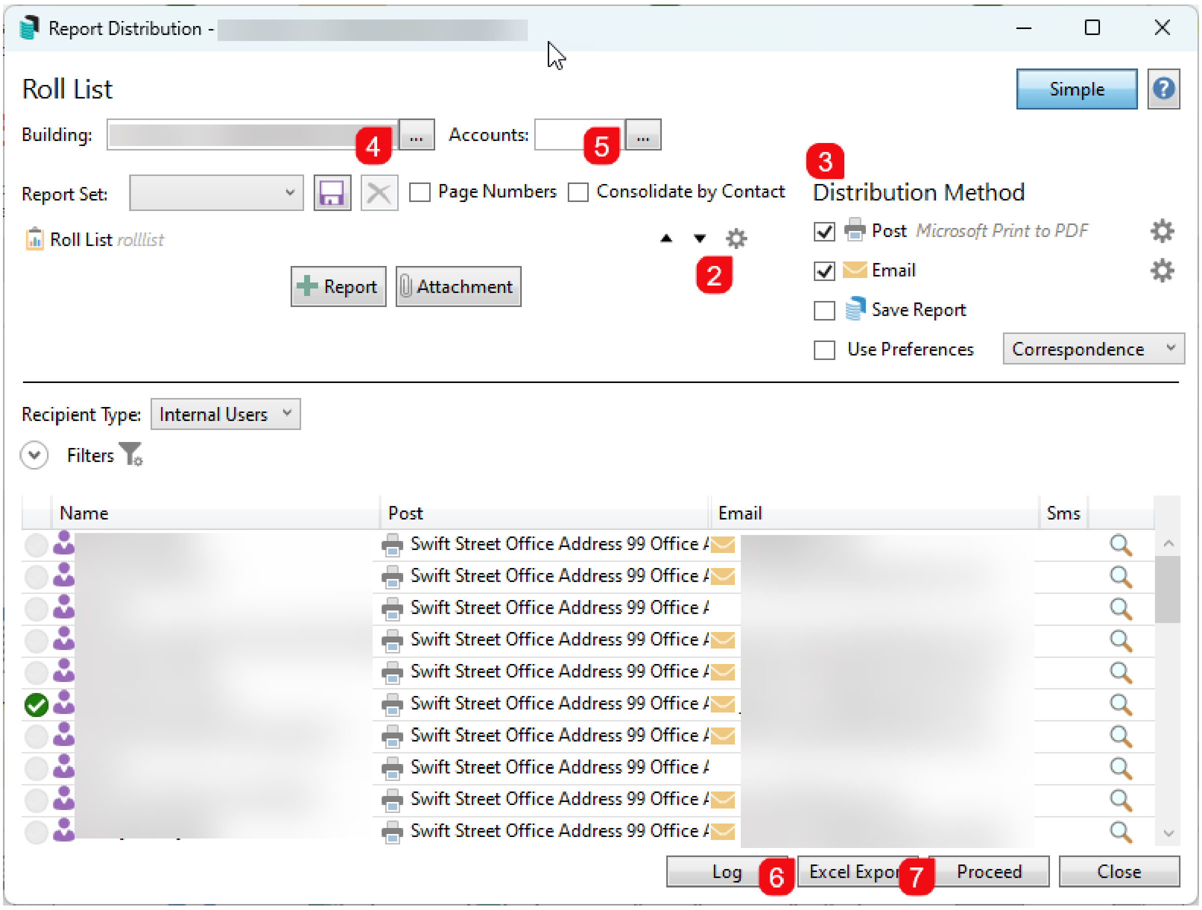


Advanced Mode

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. When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.
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 for a single building, click *Excel Report* to 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 the *Save* icon to save to a network location.

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, including setting temporary ones for one-off use.

Report Set

The following will assist in setting up report sets for the available templates in their respective areas. For example, the ***Ledger Card*** or ***Roll List***.

Create

Creating, editing, and generating report sets is a streamlined process designed to efficiently manage reports, tailored to specific needs such as meetings, financial year ends, audits, and tax.

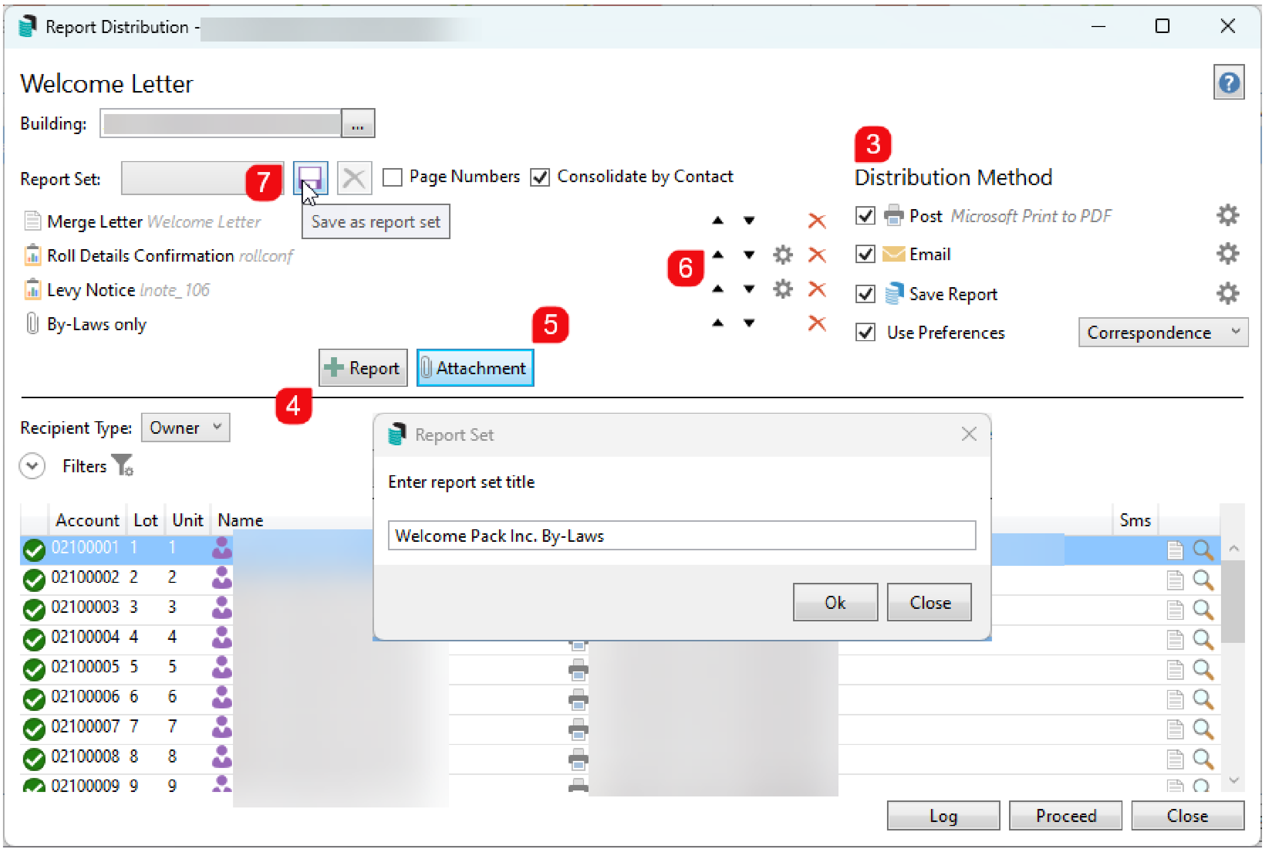
Distribute

Distributing report sets is a structured process that ensures reports are delivered efficiently.

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. When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.
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 (30-character limit). Click *OK* to save this to use again.



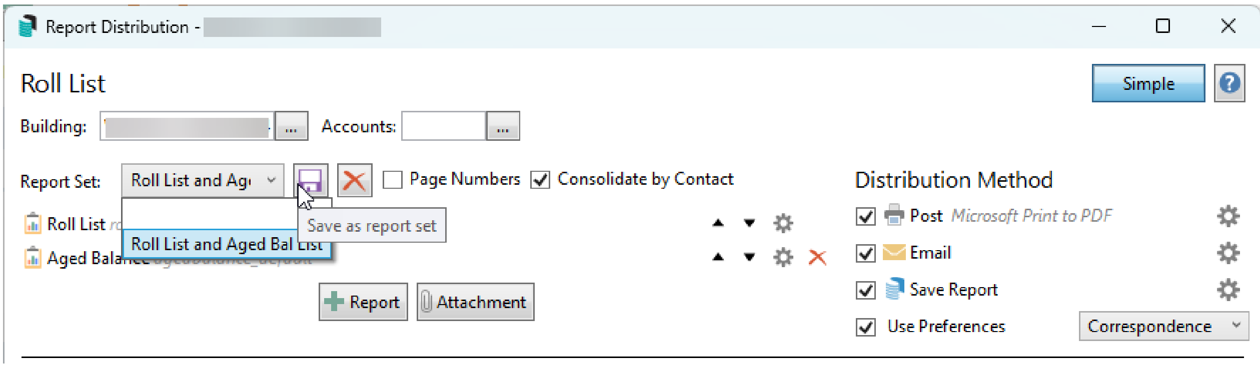
Example of Lot-Specific Report

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***.

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.

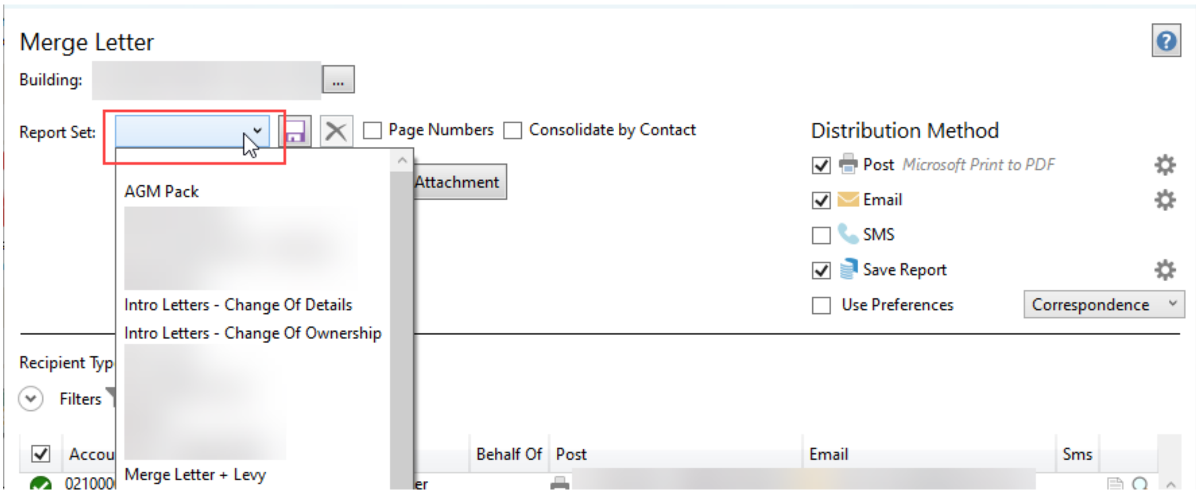
1. Search or select any of the internal reports using the *Report Distribution* screen.
2. Click *+ Report* and select these reports OR Merge Letter to add to the current distribution.
3. If any attachments are required, click *Attachment* and navigate to where the document has been saved in *DocMax* 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.*



Distributing a Report Set

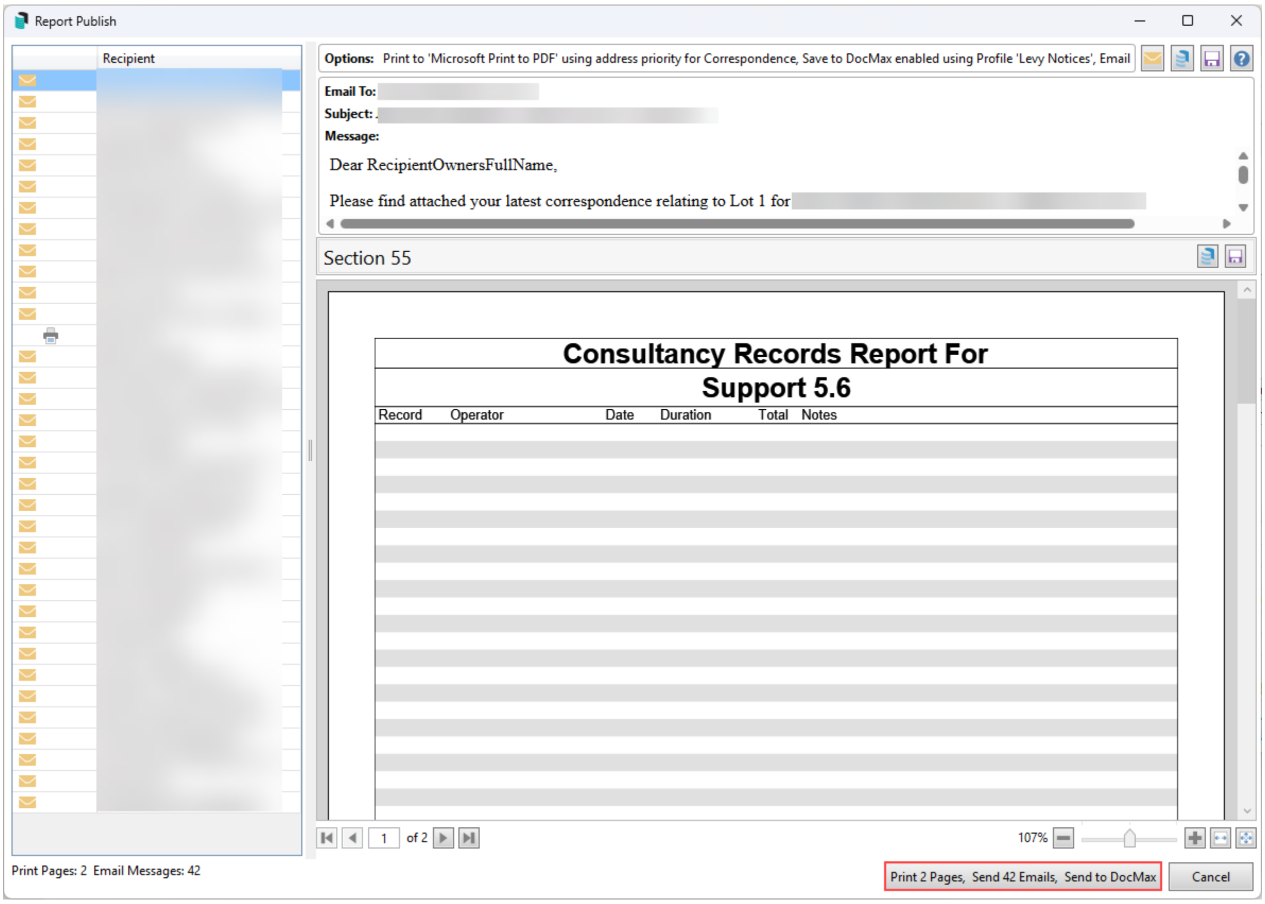
Any configured Report Set can be distributed to a Lot-Specific contact where required. Each of these areas may include its own Report Set and should be accessed from the menu where it is set.

1. Search or select the appropriate report or ***Merge Letters*** from Main or Sub-Group.
2. Click 'Cancel' if there is a Report Selection window.
3. From the *Report Set* drop-down box, select the required type.



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 contacts with the same contact, *tick Consolidate by Contact* to enable a single delivery based on preferences.
6. Review the *Distribution Method* options and adjust them as needed.

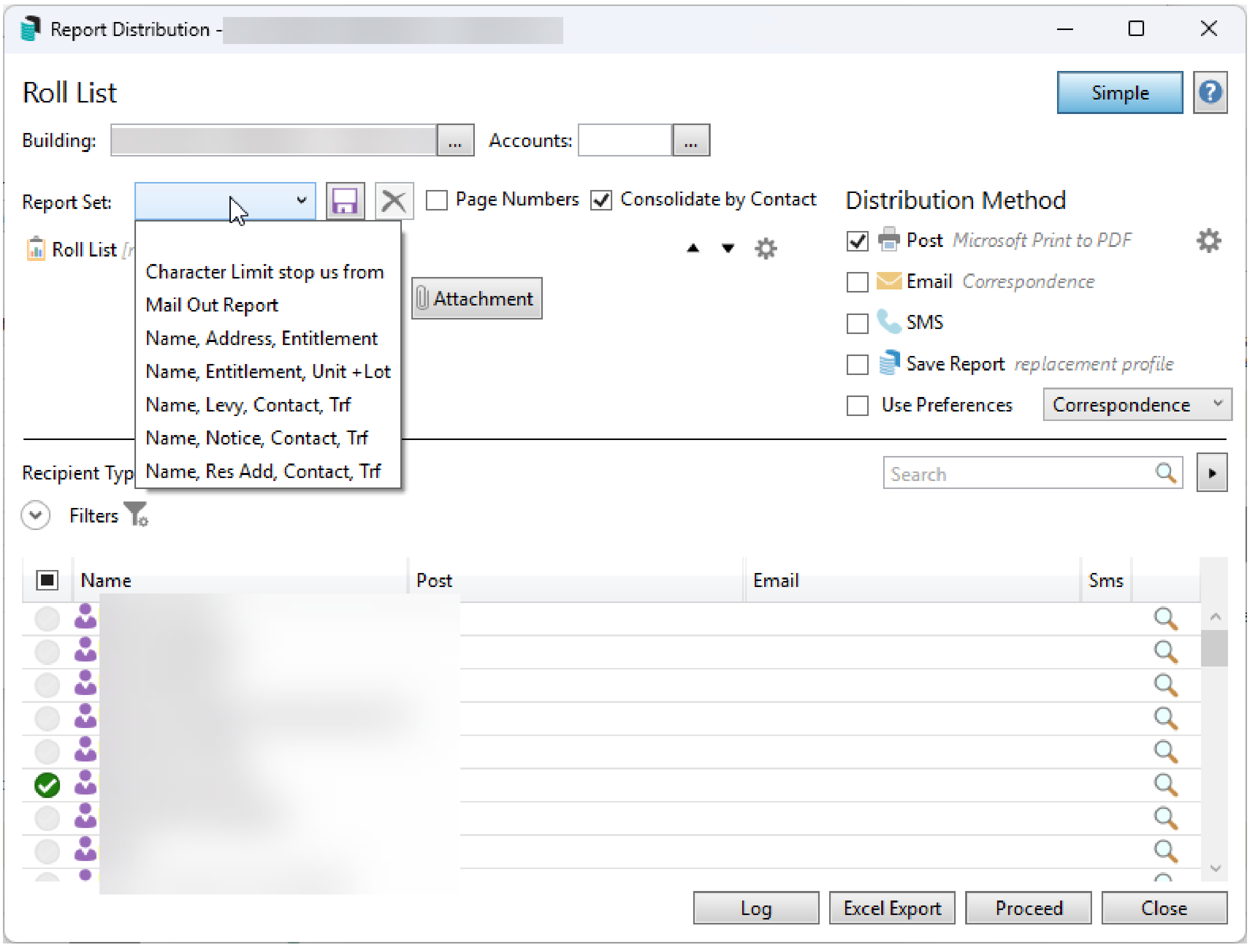
   NOTE: Any settings adjusted here will persist through the subsequent distribution process.
7. If there is a single one-off report, click *+Report* to add more reports and merge letters; similarly for *Attachment.* Add as needed.
8. Click *Proceed* to preview the results.
9. From this *Report Publish* window, click *Print X Pages, Send X Emails, Send to DocMax* button or the *Magnifying Glass* (single-contact selection) icon to finalise the distribution.



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. Financial Reporting can also be an example of internal reports, providing detailed insights into financial activities, and help monitor financial health.

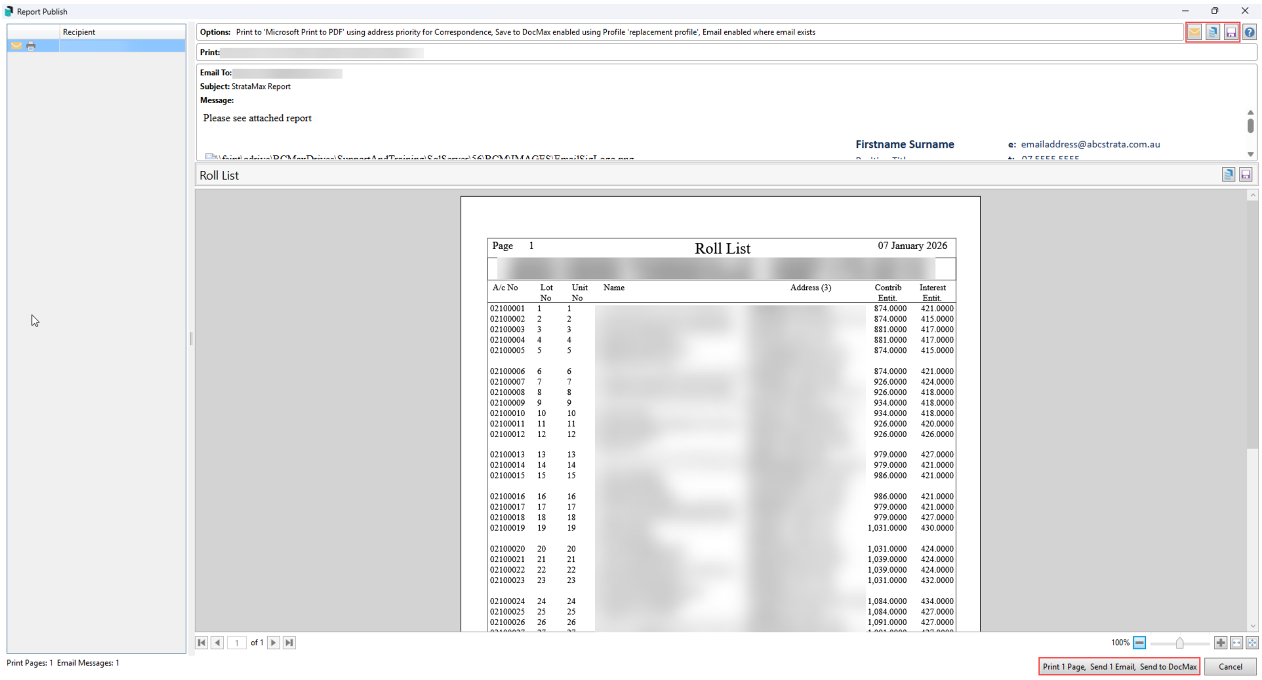
For reports that include multiple templates, for example, the Roll List, it is recommended to save a report set type for each template type.



Producing an Internal Report Set

Internal Report sets can be produced as PDFs and distributed based on the user's internal email settings running the report set.

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, tick *Page Numbers*.
4. If there is a single one-off report, click *+Report* to add more reports and merge letters; similarly for *Attachment.* Add as needed.
5. Click *Proceed.*
6. From this *Report Publish* window, click *Print X Page, Send X Email, Send to DocMax* to finalise. The distribution method for the internal user will be applied and highlighted below OR;
7. Click *Save* to save to a network location, or click the *Email* icon to send via email or add to DocMax.



Attachments

Attachments can be created using any report distribution screens, which are particularly effective with Merge Letters. The instructions below refer to how to add a document attachment.

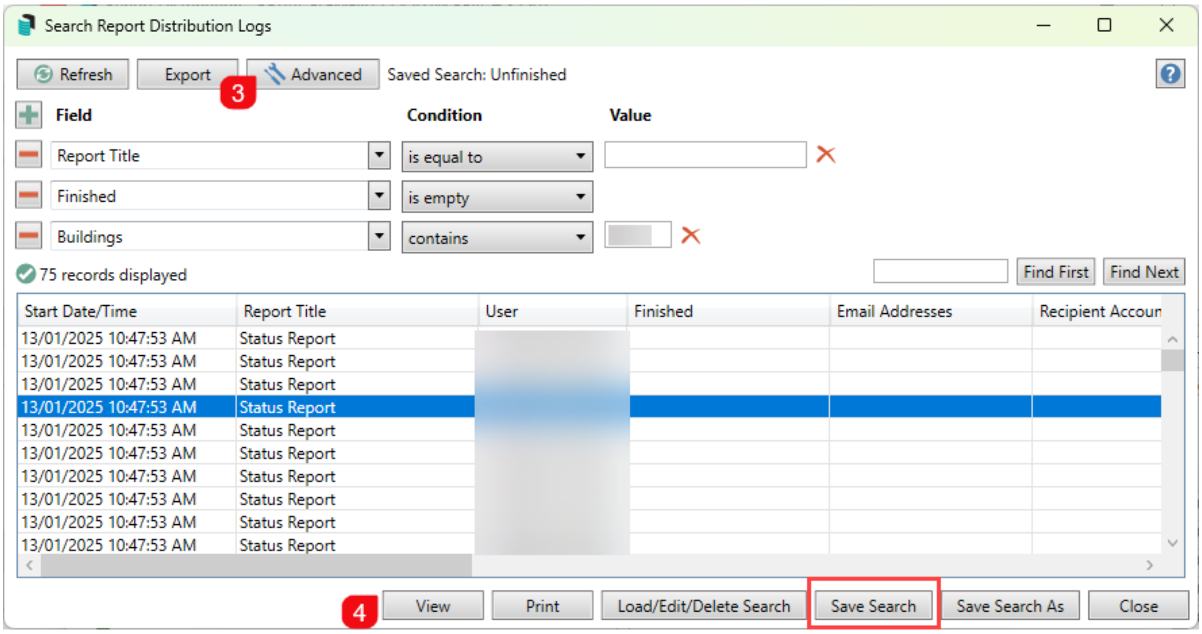
1. Search or select ***Merge Letters*** from Main or Sub-Group.
2. Click *Cancel* on the Report Selection screen.
3. Use the Building Selector tool for multiple buildings and tag buildings as needed.
4. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post* (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.*
11. From this Report Publish window, click *Print X Page, Send X Email, Send to DocMax to finalise.*

Log

The log is a powerful tool for 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 redistribute any requested information, and will assist in any failed jobs. This area reports all sent items across all menus where Report Distribution is used. If this button is unavailable, verify that the mode is set to *Advanced*.

1. Search or select the appropriate report or ***Merge Letters*** from Main or Sub-Group (using Report Distribution window)

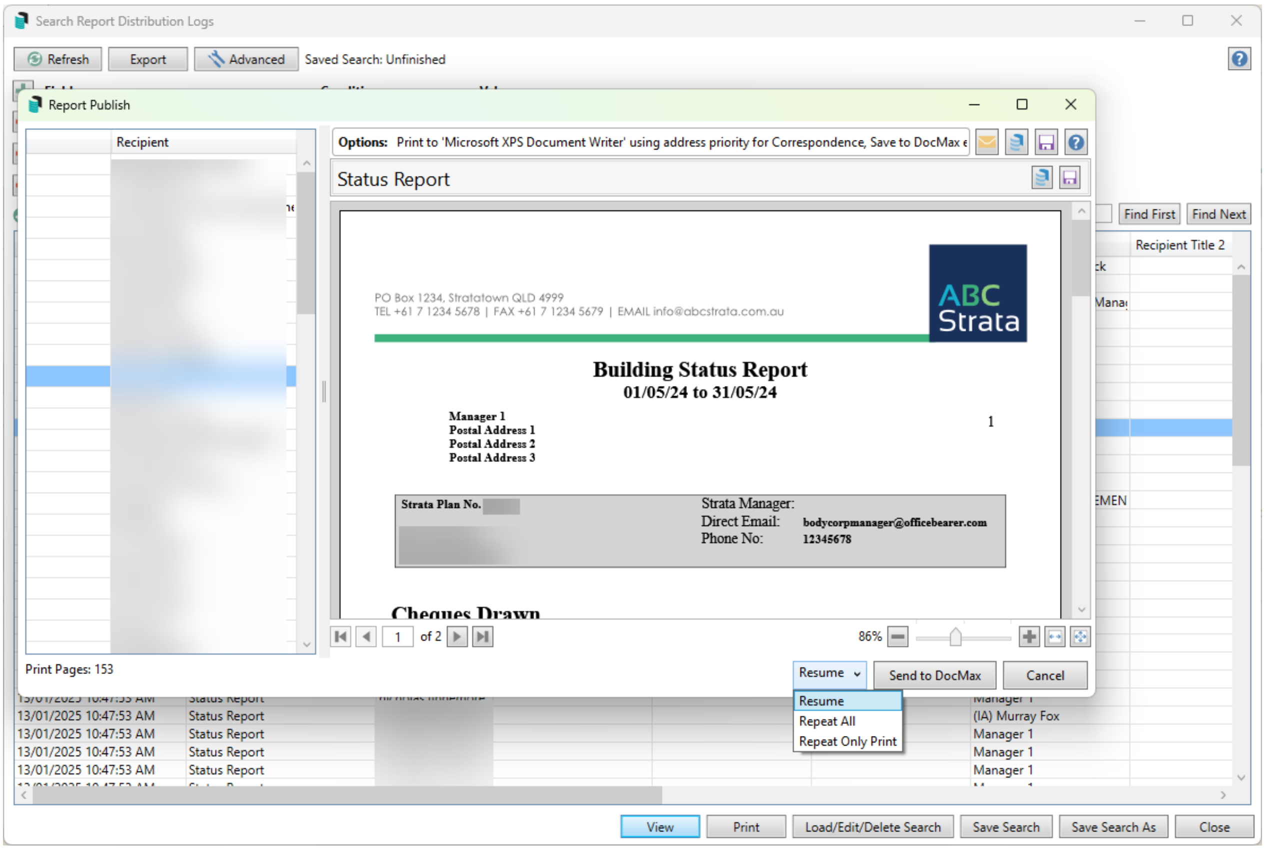
2. Click *Log*.
3. Refer to the restrictions fields and apply as needed. This can be saved as a search for later use by clicking *Save Search As* and following the screen prompt.
4. Once the distribution has been located, click *View* to see the original reports and documents.



5. Make a selection for *Resume / Repeat All / Repeat Only Print* from the preview window.
   - Resume: Resume the Distribution from where it failed.
   - Repeat All: Start the original Distribution again.
   - Repeat Only Print: Start the Distribution for records set to print only.

Once completed, the distribution will be marked with a Finished date in the log.

NOTE: Emails can be resent from the ***Communication*** log if needed.


Search Report Distribution Logs
Refresh
Export
Advanced
Saved Search: Unfinished
Report Publish
Recipient
Options: Print to 'Microsoft XPS Document Writer' using address priority for Correspondence, Save to DocMax e
Status Report
PO Box 1234, Stratatown QLD 4999
TEL +61 7 1234 5678 | FAX +61 7 1234 5679 | EMAIL info@abcstrata.com.au
ABC Strata
Building Status Report
01/05/24 to 31/05/24
Manager 1
Postal Address 1
Postal Address 2
Postal Address 3
1
Strata Plan No.
Strata Manager:
Direct Email: bodycorpmanager@officebearer.com
Phone No: 12345678
Cheques Drawn
1 of 2
86%
Print Pages: 153
Resume
Send to DocMax
Cancel
Resume
Repeat All
Repeat Only Print
Find First
Find Next
Recipient Title 2
13/01/2025 10:47:53 AM Status Report (IA) Murray Fox
13/01/2025 10:47:53 AM Status Report Manager 1
13/01/2025 10:47:53 AM Status Report Manager 1
13/01/2025 10:47:53 AM Status Report Manager 1
View
Print
Load/Edit/Delete Search
Save Search
Save Search As
Close