Search Quotes

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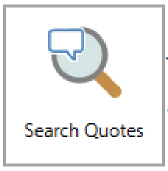


The instructions in this article relate to ***Search Quotes.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Quotes can be used to find specific statuses, for example, outstanding quotes. Another example, searching by 'Contractor Industry' (if populated from ***Creditor Maintenance***) which can be used to analyse data and exported. Using these areas will also assist in keeping the Dashboard for outstanding Quotes current.

Searches can be saved for continuous use, which can then be optionally exported to Excel or produced into a PDF-style document.

Search Quotes | Security

To access the ***Search Quotes***, the user must have permission set to 'Allow' for *Search Quotes* under the 'Menus' category in ***Security Setup.***

Search Quotes

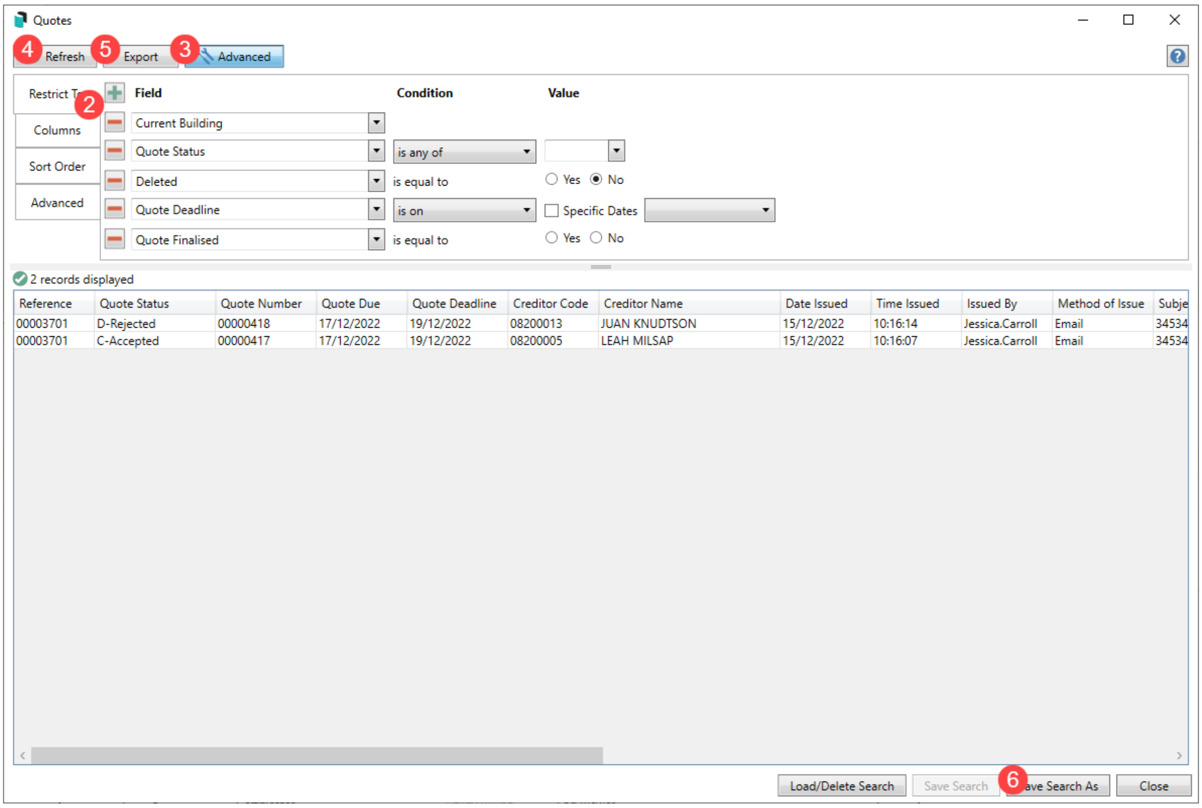
Using ***Search Quotes*** offers a search window that can be tailored to include relevant TaskMax fields of restriction, such as *Quote Deadline* date being within the last seven days to track what quotes have not been received. Another example includes using the *Quote Finalised* field to determine if quotes are finalised.

The columns and sort order displays can also be helpful to include relevant information for the scenario required. These can also be saved for a Saved Search, which will allow this to be used at a later time and can be made available for a User or Group.

To select multiple fields in the 'Columns' display area, click the first field, hold Crtl, and select the following field. This will select both fields and allow these to be moved up or down simultaneously.

1. Search or select ***Search Quotes***.
2. Referring to the restriction fields, the *Current Building* will be a default of restriction. Click + to add further fields of restriction. Click the - to remove any fields of restriction.
3. Refer to the *Advanced* area and apply any Columns and Sort Order preferences.

4. Click *Refresh* to view the results.
5. Click *Export* if this information should be available in Excel.
6. Click *Save Seach As* to save this saved search for later use.



7. Enter a *Name* for the saved search.
8. Select who should have access to this saved search. If assigned to the group, only the groups you are a member of are available.
9. Click *Save as default* if this should be the default view when opening the ***Search Quotes*** window.
10. Click *Save.*

> Each column can be clicked on to adjust the sort order.

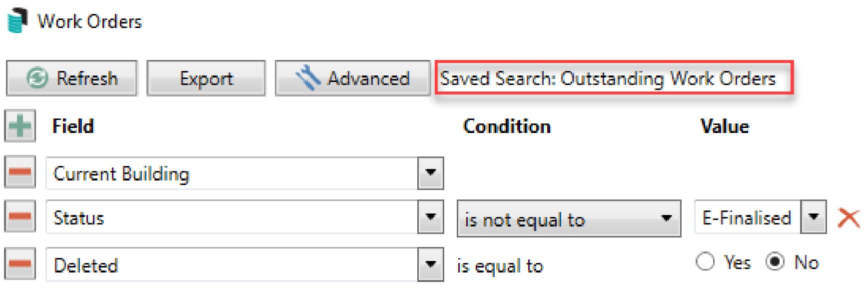
Search Quotes | Saved Searches

'Saved Searches' are designed for convenience so that you can save a selection of fields, columns, and a specific sort order so that it can be loaded later. There is also a tool to assist with quick-finding fields of text information. Use the top right corner and enter text into this field to search. Click *Find First* or *Find Next* to locate results.

'Saved Searches' can also be set as the 'default' search for the selected screen. This means that the selection of fields, columns, and specific sort order will be the one chosen whenever the menu screen/icon is selected.

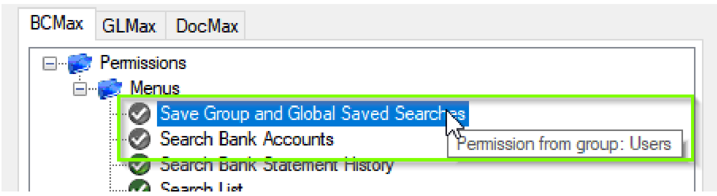
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

If a Saved Search is loaded/opened this will be noted at the top of the search screen.

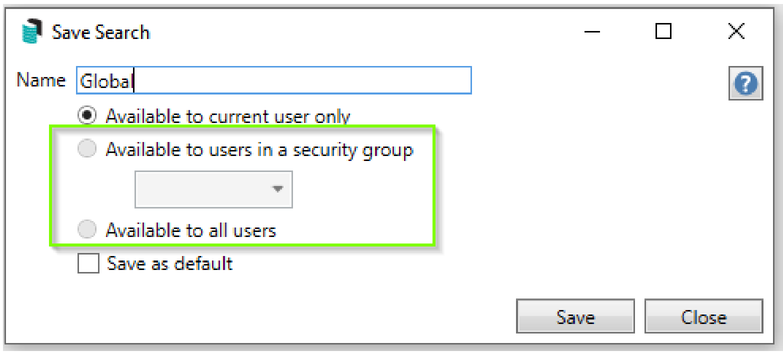


Saved Searches | Security Setup Permissions

A security permission will either allow or deny individual *Users* or *User Groups* access to create or delete a search. The permission is called ‘Save Group and Saved Searches’ under the 'Menus' category in ***Security Setup***. You can also type the word ‘Search’ into the filter field and click the *Filter* button to see the permission.



If the *User* or *User Group* do not have the permission set to 'Allow', then the ability to save a search for all users or a user group will be inactive.



Saved Searches | Set up a new Saved Search

1. Configure the required fields and click the *Refresh* button to display the required data.

    - Optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
2. Click the *Refresh* button to display the data.
3. Click the *Save Search As* button, and the 'Save Search' window will appear.
4. Enter a 'Name'.
5. Select one of the three radio buttons, depending on your requirement:
    - *Available to current user only* will save the search for the current user only.
    - *Available to users in security group* will save the search for the *User Group* selected from the drop-down (this radio button is only available if you have the right permission, and the *User Groups* available in this list are limited to the *User Groups* that you are a member of).
    - *Available to all users* will save the search for all StrataMax users (this radio button is only available if you have the right permission).
6. Optionally tick the *Save as default* box to load this 'Saved Search' whenever the menu screen / icon is opened.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search*, or click the red cross button to delete the *Saved Search*.
3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh automatically and load the *Saved Search* data.
4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

> When a Saved Search is loaded/opened, the Saved Search name will be noted at the top of the search screen.

Saved Searches | Edit a Saved Search

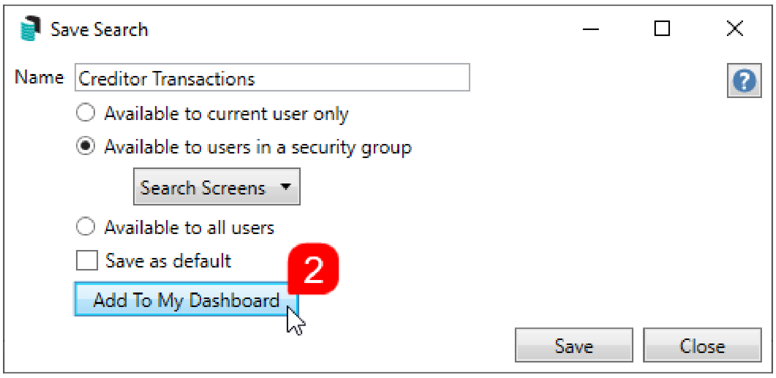
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required fields, and optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
4. Click the *Refresh* button to display and check the data.
5. Click the *Save Search* button to save the applied changes.

Saved Searches | Add To My Dashboard

There is the option to add certain searches to your own ***Dashboard***. This is limited to your own ***Dashboard*** only (you cannot add it to the ***Dashboard*** of another user or group), and only available in these specific 'Search' screens:

- ***Search Office Bearers***
- ***Search Bank Accounts***
- ***Search Creditor Invoice Items***
- ***Search Work Orders***
- ***Search Quotes***
- ***Search Building***
- ***Search Inspections***
- ***Search Levies***
- ***Management Fees Report***

1. Follow the steps to set up a new Saved Search, or edit a Saved Search (see the two relevant sections above).
2. In the 'Save Search' window, click the *Add To My Dashboard* button.

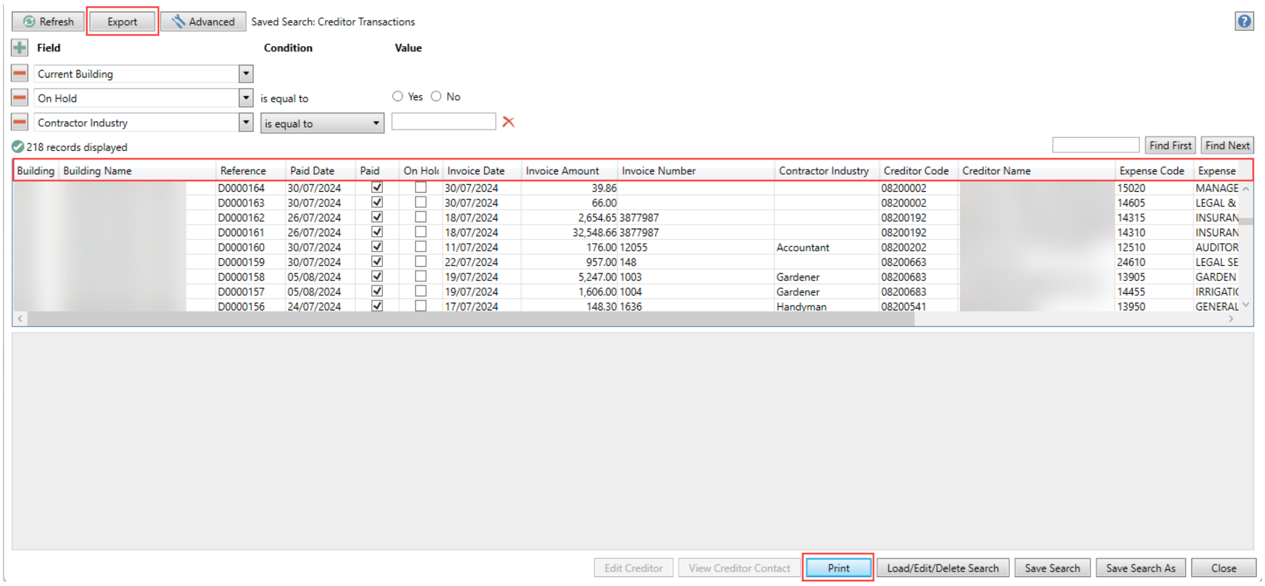


3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See *Display Types* for more information.
7. Tick *Show On Desktop* if preferred.
8. Depending on which *Display Type* was chosen, the fields for the different number values will change. Observe the *Preview* to assist with picking the right number values suited to the *Display Type.*
9. Click the *Save* button.
10. Back in the 'Save Search' screen, there are now buttons to *Edit Dashboard* and *Delete Dashboard.*
11. Click the *Close* buttons on any remaining screens.

Export and Print

Each search can be exported to Excel or produced as a PDF-style report, and the column display for these reports will be included.

- *Export* - If there are more than 1000 results, Check the *Advanced* tab / Advanced area to report the maximum. Click Export for an Excel report.
- *Print* - Check the cogwheel from the Report Distribution screen to change fonts and set the letterhead style. This print style will produce the report based on the column width. Click Print for a PDF-style report.

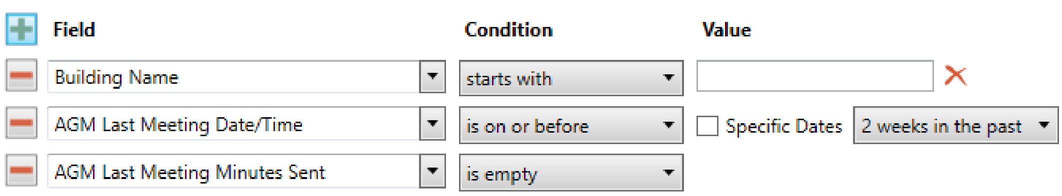


Examples of Searches for Dashboard

The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes, and your particular setup of Restrict To, Display Columns and Sort Order may vary to suit your requirements.

Last AGM where minutes have not been sent (Search Buildings)

Restrict To:



Displayed Columns:

Displayed Columns

- Building Number
- Building Name
- Account Manager
- AGM Last Meeting Date/Time
- AGM Last Meeting Minutes Sent

Assigned Team Members (Search Buildings)

Restrict To: No requirements, however you may filter by Account Manager for example.

Displayed Columns:

Displayed Columns

- Building Number
- Building Name
- Account Manager
- Account Manager Assistant Name
- Strata Finance Manager Name
- Asset Manager Name

Term Deposits maturing in next 30 days where no instruction has been provided (Search Bank Accounts)

Restrict To:

Field	Condition	Value
Building Number	is equal to	
Status	is not equal to	Removed
Account Code	is not equal to	012 - CASH AT BANK
TD Maturity Date	is in the next 30 days	
TD Renewal Instruction	is empty	

Displayed Columns:

Displayed Columns

- Bank
- Account Number
- Building Number
- Building Name
- Account Manager
- Bank Account Name
- TD Maturity Date
- TD Interest Rate
- TD Start Date
- TD Renewal Instruction

Creditor Invoices Awaiting Invoice Hub Approval & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

Field	Condition	Value
Invoice Hub Status	is equal to	Uploaded
Invoice Date	is on or before	Specific Dates: unchecked; 1 Month in the past

Displayed Columns:

Displayed Columns
Building Number
Building Name
Reference
Invoice Date
Invoice Amount
Invoice Number
Invoice Hub Status
Creditor Code
Creditor Name
Expense Code
Expense Name

Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

Field	Condition	Value
Invoice Date	is on or after	Specific Dates: unchecked; 1 Month in the past
On Hold	is equal to	Yes (selected) / No

Displayed Columns:

Displayed Columns
Building Number
Building Name
Reference
Invoice Date
Invoice Amount
Invoice Number
On Hold
Invoice Hub Status
Creditor Code
Creditor Name
Expense Code

Inspections due in next 30 days (Search Inspections)

Restrict To: setting the category to specific values allows dashboards specific to inspection types.

Field	Condition	Value
Category	is equal to	Sinking Fund Forecast
Next Due	is in the next 30 days	

Displayed Columns:

Displayed Columns

Building Number
Building Name
Category
Period
Next Due
Last Due
Inspected By Code
Inspected By Name
Result
Result Rating

Identify Creditors with no Compliance Code that have had recent activity

Restrict To:

Field	Condition	Value
Compliance Short Name	is empty	
Last Activity	is in the last 7 days	

Displayed Columns:

Displayed Columns

Building Name
Building Number
Creditor Code
Creditor Name
Balance
On Hold Total
Compliance Short Name
Compliance Long Name