# Global Transactions

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

***Global Transactions*** lets you find transactions across a portfolio, including transactions for specific tax codes, income and expense account codes, buildings, financial years, account groups, fund codes, and fund names. This area can also include group searches, which allow you to group columns by sum, minimum, or maximum, and by group styles.

This search can assist with reviewing account codes, investigating financial queries and reconciling accounts using the *Running Balance* field. Searches can be saved for future use, and results can be exported to Excel for further analysis.

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## Searches

Many search screens use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

## Global Transactions | Security

To access ***Global Transactions***, the user must have the permission set to *Allow* for *Global Transactions* under the *Menus* category.

## Global Transactions | What it can report on

***Global Transactions*** returns transaction information from across multiple buildings and financial years. Results can be reported using information such as account codes, tax codes, account type, fund codes and fund names. Because this report is global, keep in mind the *Advanced* tab and the limit setting for results.

This information can be used to review transactions for a particular income or expense account code, identify buildings with Non-Mutual Income, investigate financial queries and assist with account reconciliation.

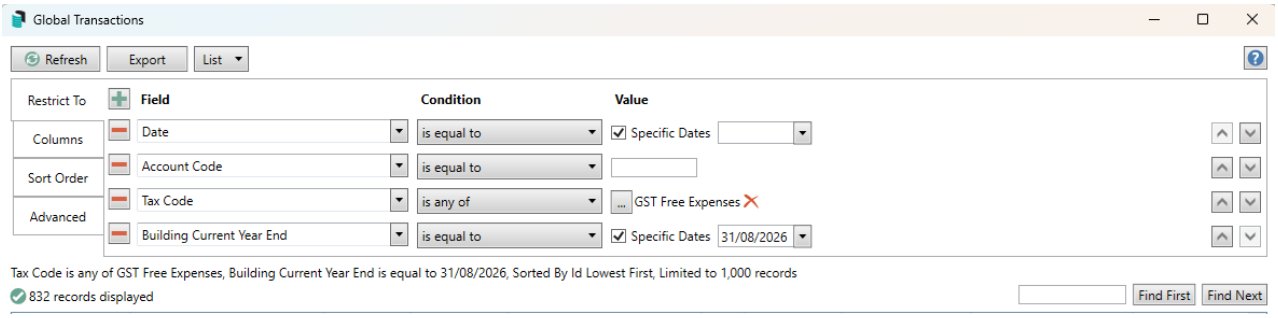
## Global Transactions | Recommended search examples

The following examples provide practical ways to use ***Global Transactions*** for transactional reporting.

## Report transactions for a particular tax code

Use this search to find income transactions allocated to a particular tax code across the portfolio.

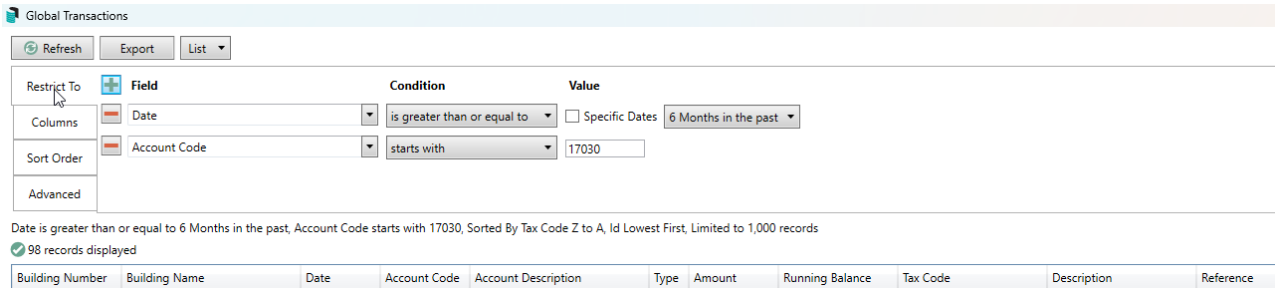
1. Search or select ***Global Transactions***.
2. Use the *Account Code* field to enter the required account code. If multiple accounts are required, click to add *Account Code* field again and enter the account code or use the condition *is in the range*.
3. Add the *Tax Code* field and use the conditions to set one, or is any of for multiple.
4. Update the *Date* restriction if required.
5. Use the *Column* display to set the displayed columns. For example, the *Tax Code*.
6. Select *Refresh* to display the transactions.
7. If required, select *Export* to export the results to Excel.




## Report transactions for a particular Account Code

This search type can be useful if a tax code change is applied in ***Account Maintenance*** and prior transactions need their tax code adjusted to match the new tax code setting. If the tax code adjustment needs to apply for all transactions within an account code, use ***Change Code Number*** to move all transactions in one process.

1. Search or select ***Global Transactions***.
2. Using the *Account Code* field of restriction, enter the account into the *value* field.
3. Update the *Date* restriction if required.
4. Use the *Column* display to set the displayed columns. For example, the *Tax Code*. Add any others that you may find useful.
5. Select *Refresh* to display the transactions.
6. To update individual transactions, complete a ***Transaction Change Code***.
7. If required, select *Export* to export the results to Excel.




# Global Transactions | Change Transaction Code

If you have taken over a property from another manager and local account codes do not align with your master chart of accounts, use ***Change Code Number*** to merge or move all local transactions from one expense code to another.

***Change Transaction Code*** is used to move individual transactions from one income or expense account code to another. This is available when the transaction type and account codes support the change.

If the original and new account codes are in the same fund or account group, most transaction types can be changed using this process. If the account codes are in different funds or account groups, you can change only expense transactions created using a D reference from ***Creditor Invoices*** this way.

***Change Transaction Code*** cannot be used for account codes set up as main or sub-accounts. Use ***Journal Preparation*** instead. Balance Sheet account code changes should also be completed using ***Journal Preparation***, with care, as these are often totalling accounts.

If the building uses ***Invoice Hub***, ***Change Transaction Code*** cannot be used while the creditor invoice is pending approval. If a creditor invoice has been partially paid, it must be paid in full before the transaction code can be changed.

After changing a transaction code, review the ***Tax Code*** because new transactions are created as part of the change. The tax code may need to be amended on the original or amended account code to ensure GST is applied correctly. Refer to Edit Tax Code for more information.

Code changes are logged in ***Log Viewer*** and can be searched using the *Transaction* category.

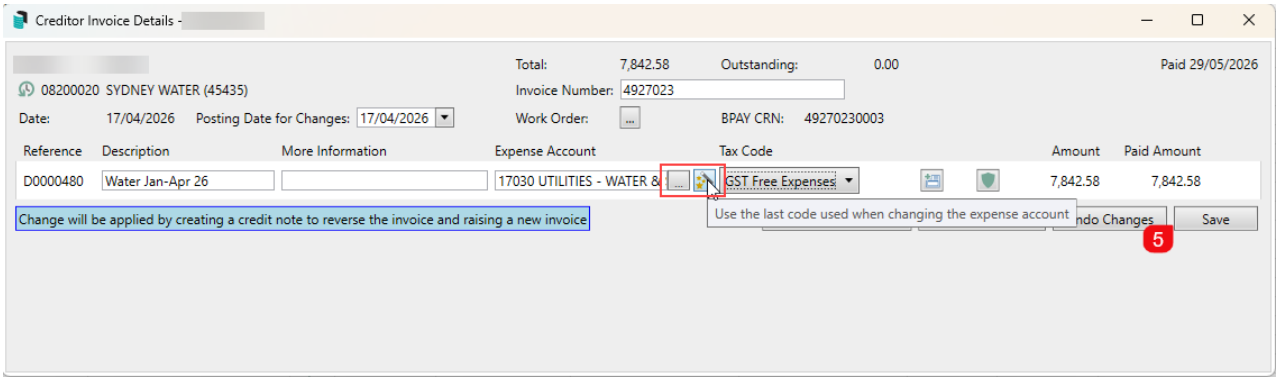
***Change Transaction Code*** is not available for the following transaction types or scenarios:

- Balance Sheet codes.
- Non-posting accounts.
- Main or sub-accounts, including debtor and creditor accounts.
- Hidden transactions.
- GST transactions with the description *GST*.
- Buildings locked by another user.
- Users who do not have ***Change Transaction Code*** permission set to *Allow* in ***Security Setup***.
- Historical years.
- Old year transactions if the building is marked as *Audited* in ***Building Information***.

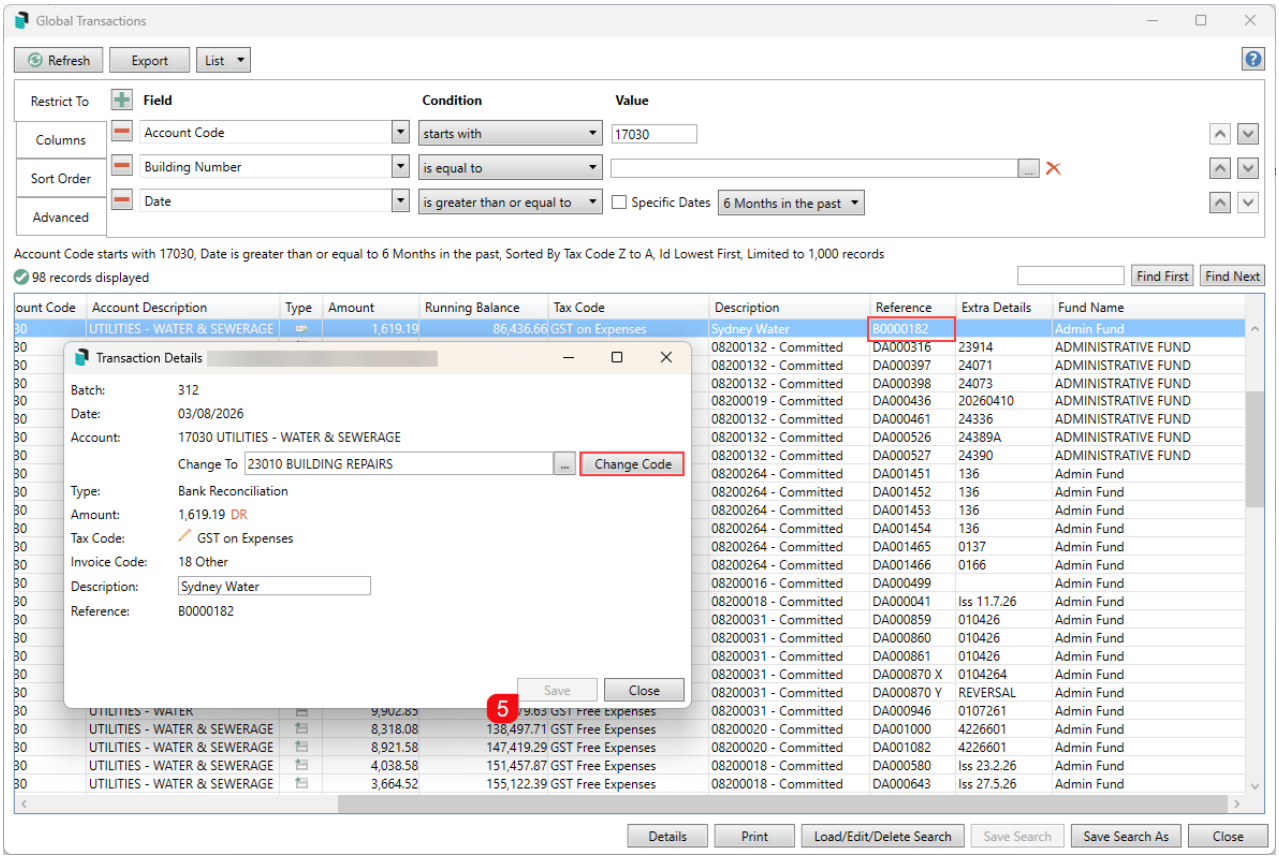
- Appropriation transactions with the description *Trf Surplus/Deficit*.

1. Search for or select ***Local Transactions*** or ***Global Transactions***, depending on where the transaction needs to be reviewed.
2. Locate and select the required transaction, then select *Details*.
3. If you can change the transaction code, the *Change To* field will be available in the *Transaction Details* window.
4. Select the ellipsis button *[...]*, then select the required account code from the *Account Code List*.
5. Select *Save*.
6. If you're applying this change from a previous transaction change, click the wand to use the last code when changing the expense account.

The blue information box explains how the change will be applied for an invoice using a DA reference number.




This example is a direct entry and uses a B reference number, with a slightly different screen view.

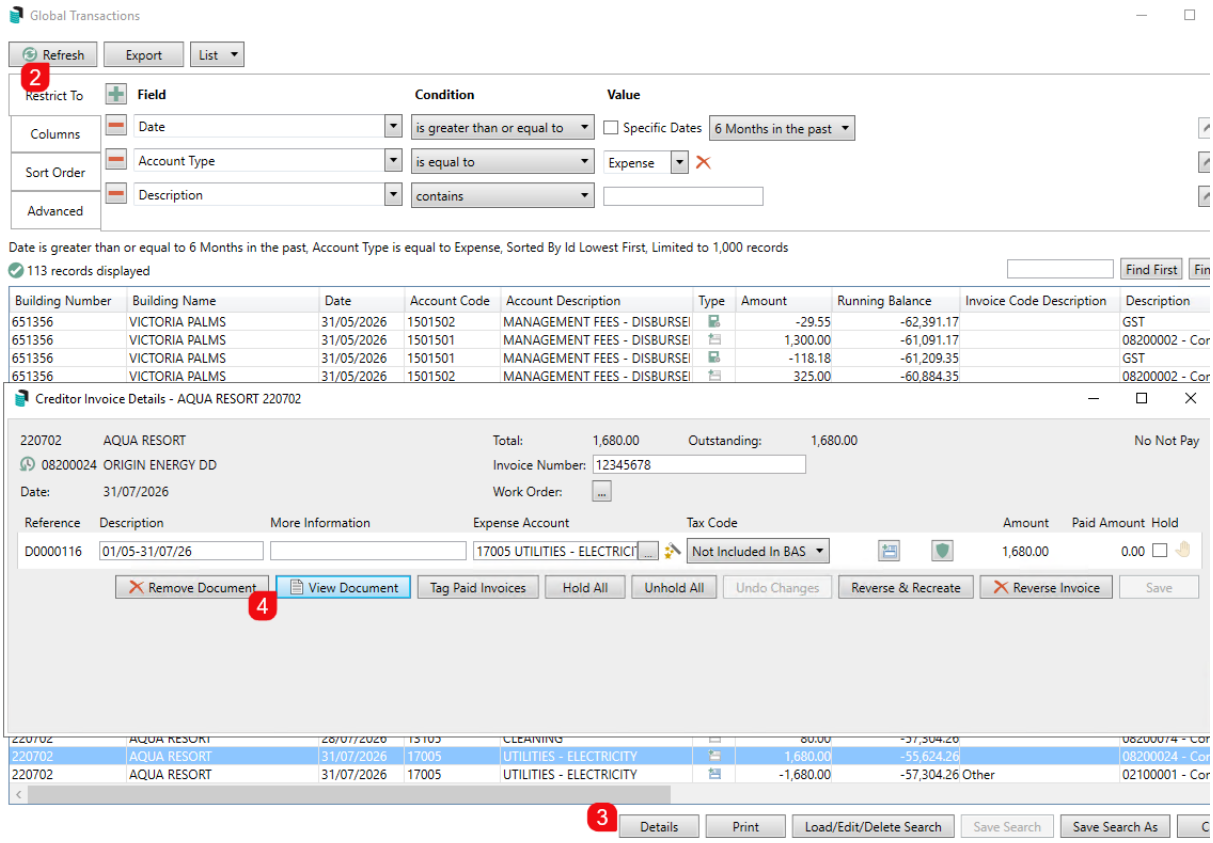



6. Select ***Refresh*** to update the transaction list and view the changed account code.

# View Document

Documents that are attached to the transaction can be located using the steps below. There is also functionality to remove or add documents.

1. Search or select ***Global Transactions*** or ***Local Transactions.***
2. Locate and select the transaction by adjusting the *Restrict To* tab as required, then clicking *Refresh.*
3. Click the *Details* button to display the 'Transaction Details' window.
4. In the 'Creditor Invoice Details' window where the details of the transaction are displayed, click *View Document*.




5. The ***DocMax*** *Document View* window will open with the document displayed. To remove the document, click *Remove Document.* If no document is attached*, Select Document* to add one.