Search Contacts

Last Modified on 01/07/2024 10:52 am AEST

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

Search Contacts can be used to easily search Contacts such as Owners, Agents and Creditors/Contractors by Name, Email Address, Phone Number, Delivery Preferences and more across all buildings in a portfolio, that can then optionally be exported to Excel.

Search Contacts | Security

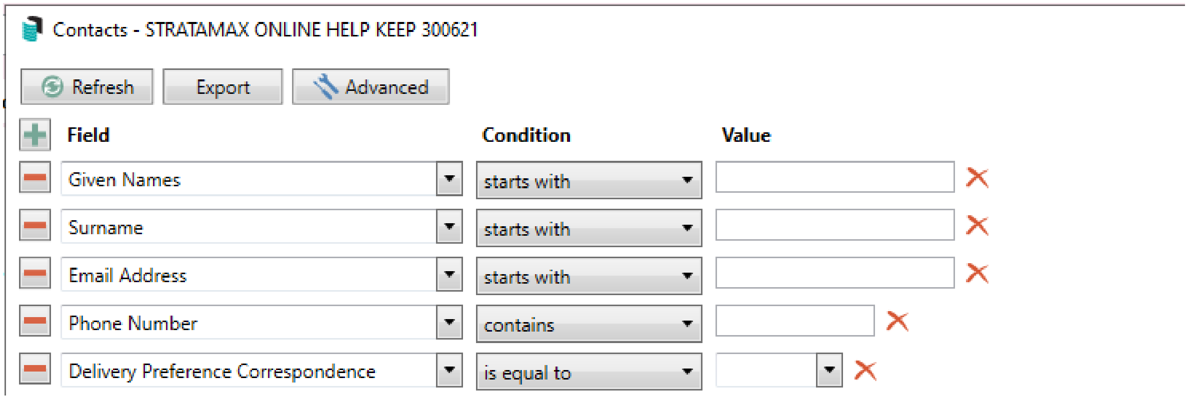
To access the ***Search Contact*** icon, the user must have permission set to 'Allow' for *Search Contacts* under the 'Menus' category in ***Security Setup*.**

Search Contacts

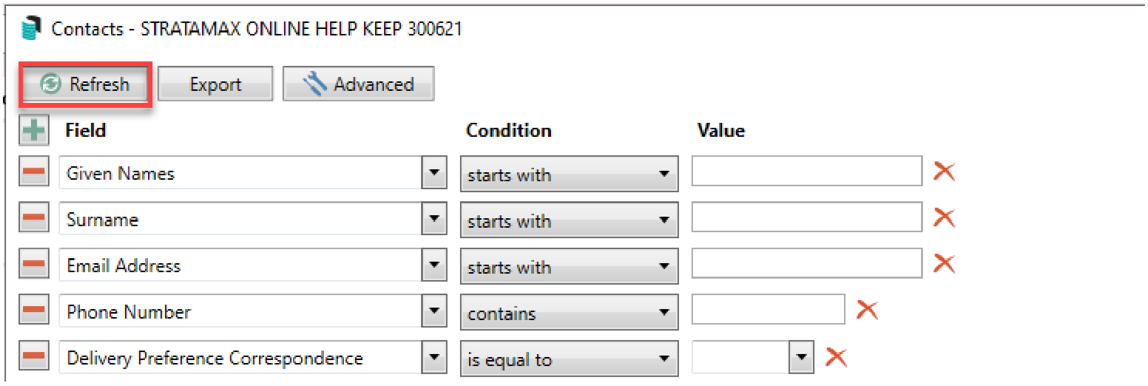
Search for Contacts such as Owners, Agents & Creditors/Contractors by Name, Email Address, Phone Number, Delivery Preferences and more across all buildings in a portfolio and export to Excel if required.

Using the Value field, the results of the report can be narrowed down on specific requirements. Additional columns can be included into the search results using the **Advanced** option.

1. Search or select ***Search Contacts***.
   - By default, the 'Given Names', 'Surname', 'Email Address' & 'Phone Number' **Fields** are selected.
   - Adjust the 'Hide from Selection Field' to include one of the other searchable Fields for example Delivery Preferences.
2. The **Value** can be typed to further adjust the results and you can clear the selection by clicking the red cross icon next to the **Value**.



3. Click the *Refresh* button to load the results.
   - Click a column header to sort the data by that column.



4. Click the *Advanced* button to display additional tabs down the left side:
   - *Columns* to add, remove, or change the order of the columns.
   - *Sort Order* to change how the data in the table is sorted (by column, A-Z, etc.)
   - *Advanced* to change the maximum number of records to display in the table (10000, 1000, etc.).
5. Click the *Refresh* button to search for the records.
6. If you would like to, you can export the data to an Excel sheet, by clicking the *Export* button.

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

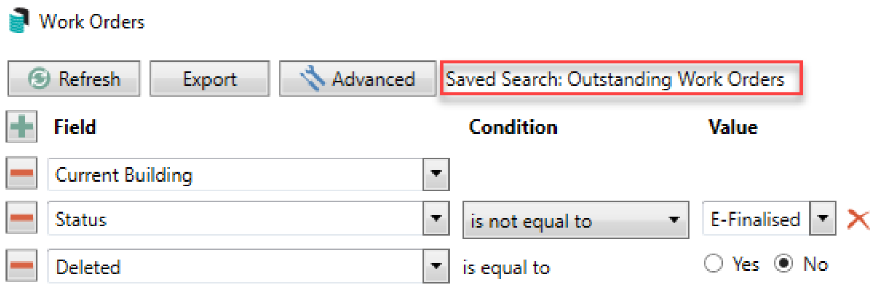
Search Contacts | Saved Searches

'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.

'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.

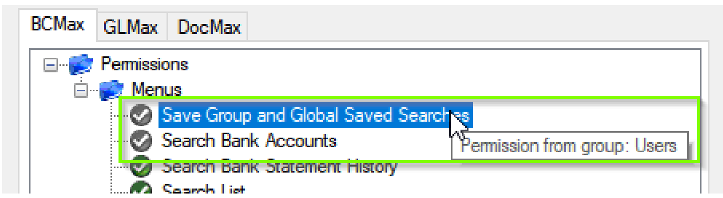
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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

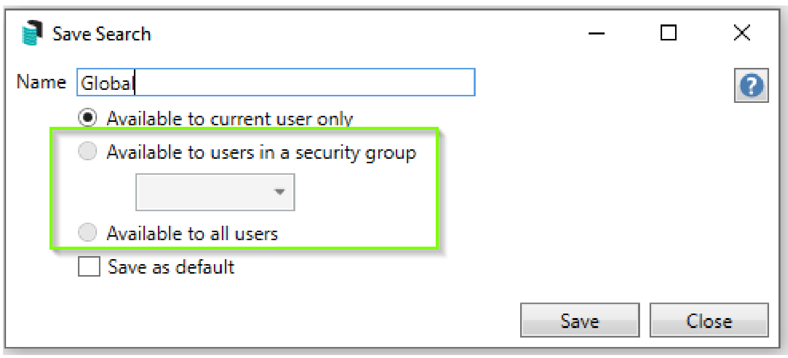


Saved Searches | Security Setup Permissions

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

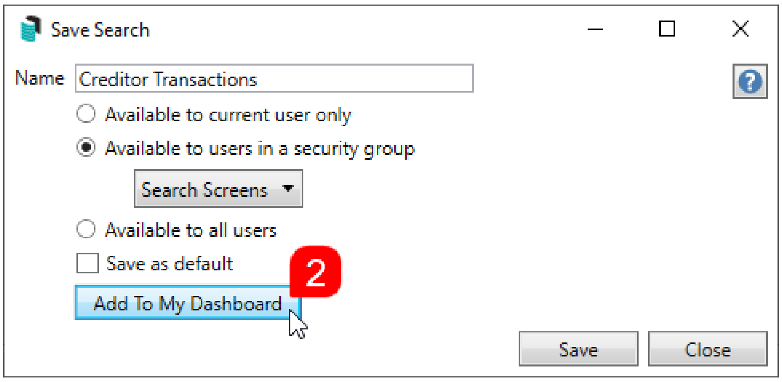
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required 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

As of *StrataMax version 5.6.98*, 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 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.



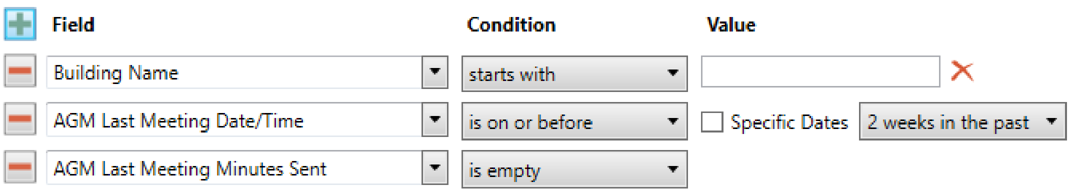
3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See *Display Types* for more information.
7. Tick *Show On Desktop* 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.

Examples of Searches for Dashboard

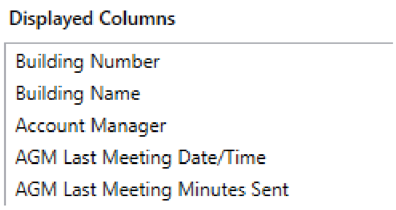
The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes and your particular setup 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:



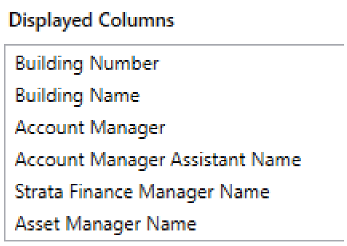
Display Columns:



Assigned Team Members (Search Buildings)

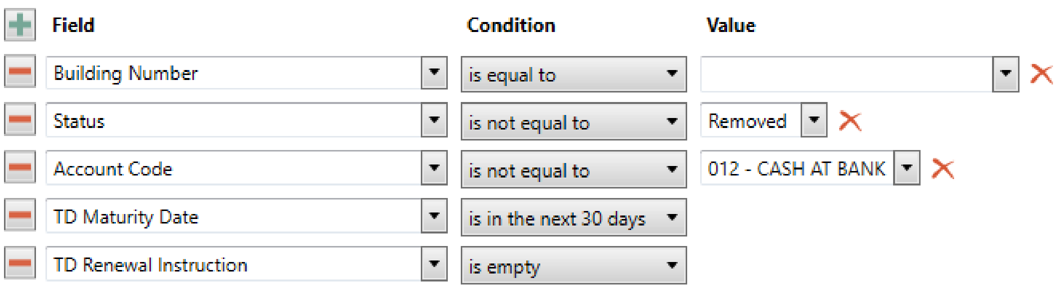
Restrict To: No requirements however you may filter by Account Manager for example

Display Columns:

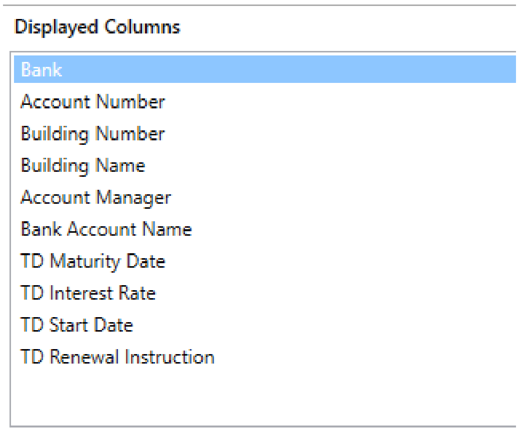


Term Deposits maturing in next 30 days where no instruction has been provided (Search Bank Accounts)

Restrict To:

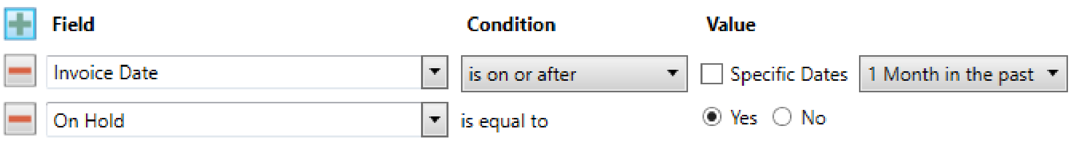


Display Columns:

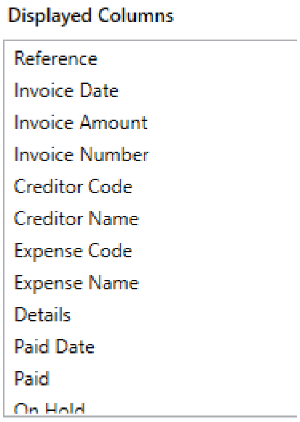


Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

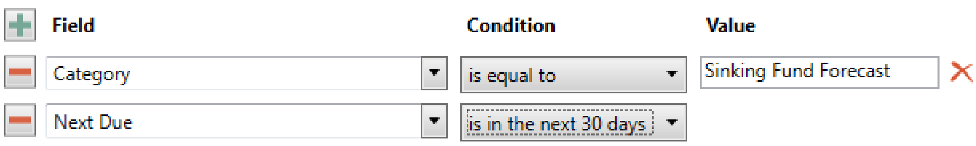


Display Columns:



Inspections due in next 30 days (Search Inspections)

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



Display Columns:

Displayed Columns

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