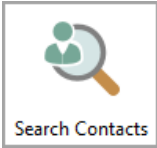


Search Contacts

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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 is used to search contacts such as Owners, Agents and Creditors/Contractors across all buildings in a portfolio. It can report on details such as Name, Email Address, Phone Number, Delivery Preferences and other searchable contact fields.

This search assists with locating contact details quickly and narrowing the results to specific requirements. Results can be exported to Excel or produced into a PDF-style document.

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.

Search Contacts | Security

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

Search Contacts | What it can report on


Search Contacts can report on contacts across the portfolio, including Owners, Agents and Creditors/Contractors. It can search on details such as Given Names, Surname, Email Address, Phone Number, Delivery Preferences and other searchable fields.

This is useful when you need to find contact details quickly, narrow the results to a specific requirement, or produce a list for reporting and export.


Search Contacts | Recommended search examples

Find a contact by email address

This search can be used to locate a contact record using an email address across all buildings in the portfolio.

1. Search for or select **Search Contacts**.
2. Using the *Restrict To* tab,  to add fields of restriction. For example, use the *Email Address* field.

3. Type the required value in the *Value* field.
4. Click *Refresh* to load the results.

 Search Contacts

Saved Search: Contact Info & Delivery Preferences

Restrict To	+	Field	Condition	Value
Columns	<input type="checkbox"/>	Contact Title	contains	<input type="text"/>
Sort Order	<input type="checkbox"/>	Phone Number	contains	<input type="text"/>
Advanced	<input type="checkbox"/>	Email Address	contains	<input type="text"/>
	<input type="checkbox"/>	Delivery Preference Correspondence	is equal to	<input type="text"/> <input type="button" value="v"/> <input type="button" value="x"/>
	<input type="checkbox"/>	Delivery Preference Notices	is equal to	<input type="text"/> <input type="button" value="v"/> <input type="button" value="x"/>
	<input type="checkbox"/>	Contact Type	is equal to	<input type="text"/> <input type="button" value="v"/> <input type="button" value="x"/>

Sorted By Contact Title A to Z, Limited to 1,000 records

Find a contact by phone number

This search can assist with locating a contact using a phone number when only limited details are available.

1. Search for or select **Search Contacts**.
2. Use the *Phone Number* field.
3. Type the required value in the *Value* field.
4. Click *Refresh* to display the matching contacts.

Search contacts by Hidden Selection

This search can be used to identify contacts that are hidden from selection because they are unreferenced.

1. Search for or select **Search Contacts**.
2. Include the *Hide from Selection Field* from the Restrict To tab, which allows setting *Yes* or *No* when using this.
3. This field can also be included in column view and will provide a tick box selection for when set to *Yes*.
4. Click *Refresh* to display the results.

Review and sort contact search results

This search can assist with reviewing the returned contacts and sorting the results by the most useful column.

1. Search for or select **Search Contacts**.
2. Enter the required *Value* for the search.

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