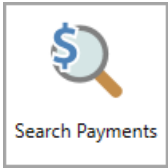


# Search Payments

Last Modified on 08/08/2024 1:38 pm AEST

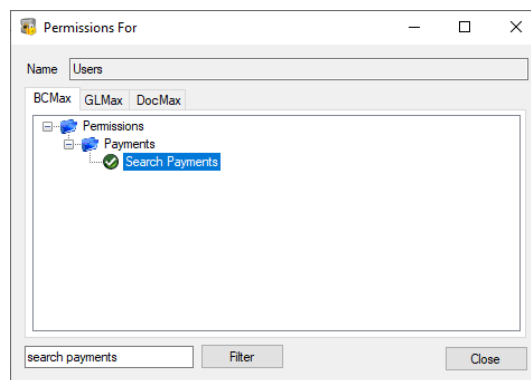


The instructions in this article relate to **Search Payments**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

**Search Payments** will assist with querying payments for a single building or across your portfolio. Payments for a particular Creditor account can be searched, internal and external Remittance Advice Notes can be viewed, plus including the EFT Batch Status for any payments submitted, reversed or batches created and not authorised can be searched on. Searches can be saved for continuous use and the information can be exported to Excel.

## Search Payments | Security

To access the **Search Payments**, the user must have permission set to 'Allow' for *Search Payments* under the 'Payments' category in [Security Setup](#).



## Search Payments

**Search Payments** will display payments for a Creditor account for a single building or across your portfolio. Searches can be created based on set values; each column can be clicked on to sort and results can be exported to Excel.

1. Search or select **Search Payments**.

2. By default, the fields 'Current Building', 'Date' and 'Account Code' will be applied.
  - By removing (click the red 'minus' button) or changing the 'Current Building' field to a different field, it will display payments across your entire portfolio.
  - The 'Date' field is used to select a specific date or date range, including an old or historic year. Or by removing (click the red 'minus' button) or changing the 'Date' field to a different field, it will display the full history of transactions.
3. To add another field, click the green plus button, then select the **Field** by clicking the drop-down menu.
4. Based on the selected **Field**, the **Condition** can be changed if required, and then you can change/select the required **Value**.
5. 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.).
6. Click the *Refresh* button to search for the records.
7. If you would like to, you can export the data to an Excel sheet, by clicking the *Export* button.

## Search Payments | Example of Remittance Advice Internal and External Note

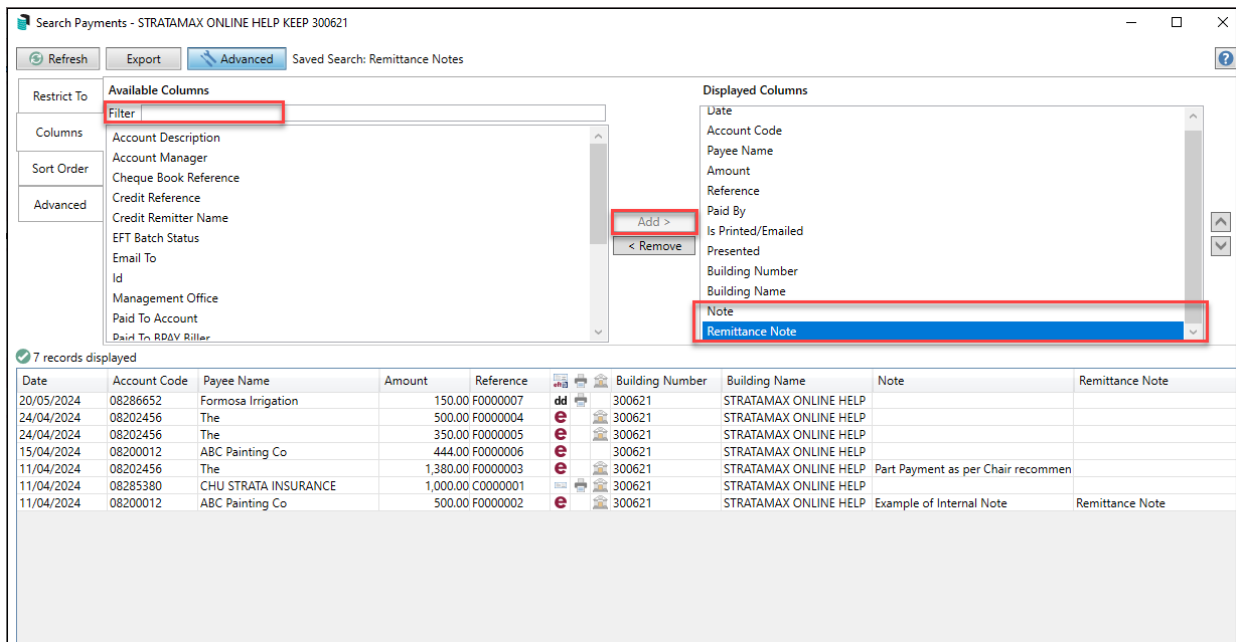
Internal and External Remittance Advice Notes can be viewed in **Payments Management**, as well as from **Search Payments**. The Field 'Note' and 'Remittance Note' are required and from Columns 'Add' these columns to the Displayed Columns. These fields can be saved using *Save Search As* for repeat use.

The screenshot shows the 'Search Payments' window with the following search criteria:

- Restrict To:** Current Building
- Condition:** is on or after
- Value:** Specific Dates: 1 Year in the past
- Advanced:** Note (contains), Remittance Note (contains)

The table below shows 7 records displayed:

Date	Account Code	Payee Name	Amount	Reference	Building Number	Building Name	Note	Remittance Note
20/05/2024	08286652	Formosa Irrigation	150.00	F0000007	300621	STRATAMAX ONLINE HELP		
24/04/2024	08202456	The	500.00	F0000004	300621	STRATAMAX ONLINE HELP		
24/04/2024	08202456	The	350.00	F0000005	300621	STRATAMAX ONLINE HELP		
15/04/2024	08200012	ABC Painting Co	444.00	F0000006	300621	STRATAMAX ONLINE HELP		
11/04/2024	08202456	The	1,380.00	F0000003	300621	STRATAMAX ONLINE HELP	Part Payment as per Chair recommen	
11/04/2024	08285380	CHU STRATA INSURANCE	1,000.00	C0000001	300621	STRATAMAX ONLINE HELP		
11/04/2024	08200012	ABC Painting Co	500.00	F0000002	300621	STRATAMAX ONLINE HELP	Example of Internal Note	Remittance Note



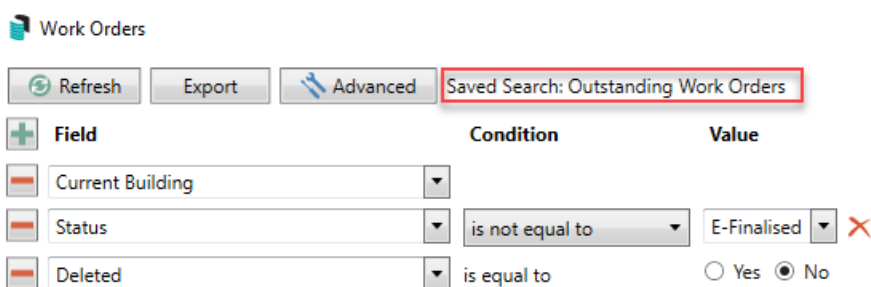
## Search Payments | Saved Searches

'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.

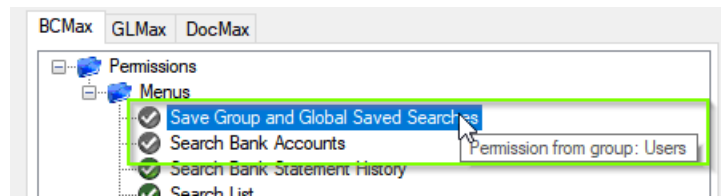
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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

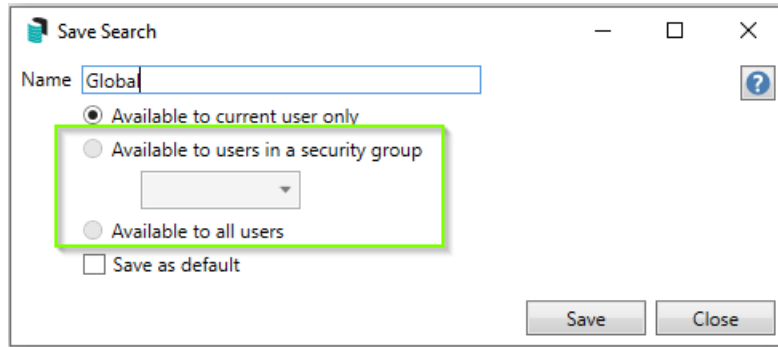


## Saved Searches | Security Setup Permissions

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

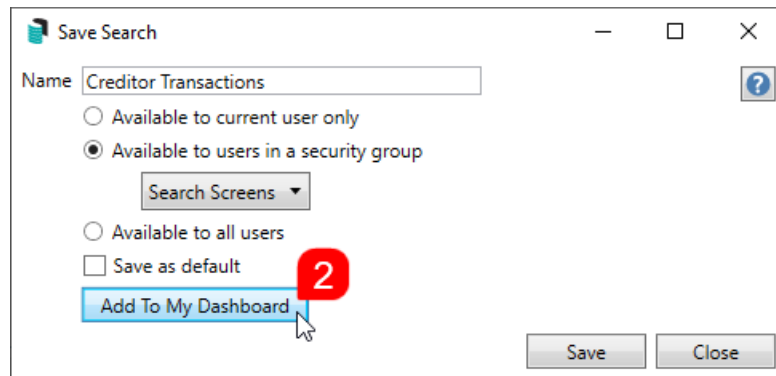
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required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

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.

## 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:

Field	Condition	Value
Building Name	starts with	
AGM Last Meeting Date/Time	is on or before	<input type="checkbox"/> Specific Dates 2 weeks in the past
AGM Last Meeting Minutes Sent	is empty	

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
<input type="checkbox"/> Building Number	is equal to	<input type="text"/>
<input type="checkbox"/> Status	is not equal to	Removed <input type="checkbox"/>
<input type="checkbox"/> Account Code	is not equal to	012 - CASH AT BANK <input type="checkbox"/>
<input type="checkbox"/> TD Maturity Date	is in the next 30 days	
<input type="checkbox"/> 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 on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

Field	Condition	Value
<input type="checkbox"/> Invoice Date	is on or after	<input type="checkbox"/> Specific Dates <input type="text" value="1 Month in the past"/>
<input type="checkbox"/> On Hold	is equal to	<input checked="" type="radio"/> Yes <input type="radio"/> No





Displayed Columns:

#### Displayed Columns

Reference  
Invoice Date  
Invoice Amount  
Invoice Number  
Creditor Code  
Creditor Name  
Expense Code  
Expense Name  
Details  
Paid Date  
Paid  
On Hold

### 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

---