

Organisation - Searches

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The instructions in this article relate to **Organisation Searches**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search* for multiple drive clients.

Organisation Searches are used to search across multiple drive clients for records in the **Roll**, **Contacts**, **Office Bearers**, and **Creditors** areas. These searches return results from each drive and include an additional *Drive* column to show where the record is located.

These searches can assist with everyday tasks such as locating records across multiple drives, reviewing information without opening each drive individually, and drilling into the related record where available. Searches can also be set as **Dashboard** items, saved for ongoing use, 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 Organisation Searches | Security

To access **Organisation Searches**, the user must have permission set to *Allow* for *Organisation - Roll*, *Organisation - Contacts*, and *Organisation - Creditors* under the *Menus* category in **Security Setup**.

Access to **Organisation - Office Bearers** is available where multi drive access is provided, and permissions are based off the *Office Bearers* Menu **Security Setup** permission.

Search Organisation Searches | What it can report on

Organisation Searches can report on roll records, contact records, office bearer records, and creditor records across multiple drives. Each search is based on the relevant search framework for that area and returns results with a *Drive* column so the source drive can be identified quickly.

This is useful when you need to find information across a portfolio without searching each drive separately. Depending on the organisation search used, you can also drill into the related record, such as opening the roll or contact record in its respective drive, or reviewing invoice items for a selected creditor.

Search Organisation Searches | Recommended search examples

Find roll records across multiple drives

This search can be used to locate roll records across multiple drives and identify which drive contains the record you need.

1. Search for or select **Organisation - Roll**.
2. Enter the search criteria needed to return the required roll records.
3. Click *Refresh* to display the results.
4. Review the *Drive* column to identify the drive where the record is located.
5. If required, click *Details* to drill down and open the roll record in its respective drive.

Find contact records across multiple drives

This search can assist with locating contact records across multiple drive clients and opening the required contact record from the results.

1. Search for or select **Organisation - Contacts**.
2. Enter the search criteria needed to return the required contact records.
3. Click *Refresh* to display the results.
4. Review the *Drive* column to identify the drive where the record is located.
5. If required, click *Details* to drill down and open the contact record in its respective drive.

Review creditor records and drill into invoice items

This search can be used to find creditor records across multiple drives and review invoice items for a selected creditor.

1. Search for or select **Organisation - Creditors**.
2. Enter the search criteria needed to return the required creditor records.
3. Click *Refresh* to display the results.
4. Select the required creditor record.
5. Click *Search Invoice Items* to drill into the items for the selected creditor.

Access will be based on the permissions set in the relevant drive. For example, if access to *Search Invoice Item* is denied in the drive where the record is located, access will also be denied in the organisation search.

Review office bearer records across multiple drives

This search can assist with locating office bearer records across multiple drive clients where multi drive access is available.

1. Search for or select **Organisation - Office Bearers**.
2. Enter the search criteria needed to return the required office bearer records.
3. Click *Refresh* to display the results.

4. Review the *Drive* column to identify the drive where the record is located.