

Searches

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In StrataMax, search screens provide a practical way to find, review, report, and export information across different areas of the system. These searches can assist with everyday tasks such as checking records, reviewing transactions, following up outstanding items, and preparing information for reporting.

All of the search screens use the same user interface, layout and tabs, even though each one reports on a different area of data. This provides a much easier user experience with uniform functionality. The *Column*, *Sort*, and *Advanced* areas are displayed when the search screen opens, making it easier to review and adjust the available search settings straight away.

Search basics

1. Open the required search screen.
2. The search screen will open with a table showing the records available for that search.
3. Use the *Restrict To*, *Columns*, *Sort Order* & *Advanced* tabs to set the restrictions, choose the columns to display, and control the sort order.
4. Click *Refresh* to apply any changes and display the updated results.
5. If required, click *Export* to export the current search results to Excel.
6. Use the *Find First* and *Find Next* options to locate a specific record in the results.
7. Depending on the search screen being used, additional buttons such as *Details*, *Transactions*, or *Report* may be available once a record is selected.
8. Once the search has been set up, click *Save Search As* to save it for later use.
9. Use *Load/Edit/Delete Search* to load a saved search, or to edit or delete an existing saved search.
10. If a saved search has been loaded and you make changes, click *Save Search* to save the updates to that search.
11. If required, click *Add Dashboard Item* to make the search available from the Dashboard.

Search Roll - STRATAMAX ONLINE HELP 1521

Refresh Export List Saved Search: All Roll Positions/ All Buildings

Restrict To	Field	Condition	Value
Columns	Roll Position	is equal to	
Sort Order	Is Current		
Advanced	Contact Title	contains	
	Building Number	is equal to	
	Phone Number	contains	

Is Current, Sorted By Building Name A to Z, Lot Number A to Z, Limited to 10,000 records

Find First Find Next

Building Name	Building Number	Contact Type	Contact Title	Email Address	Phone Number	Roll Position	Unit Number
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Details Transactions Print Load/Edit/Delete Search Save Search Save Search As Close

Restrict To

The *Restrict To* tab is used to define which records should be returned in the search results. This is where the search fields, conditions, and values are entered.

1. To add a restriction field, click the green *plus* button.
2. To remove a restriction field, click the red *minus* button.
3. Select the required option from the *Field* list.
4. Select the required option from the *Condition* list.
5. Enter or select the required *Value*.
6. Click *Refresh* to apply the restriction and update the results.

The available *Condition* and *Value* options will vary depending on the selected field. For example, date fields may provide date-based conditions, and some conditions may change or remove the value field depending on the option selected.

If required, the same field can be added more than once to apply different values or conditions in the one search. This can be helpful when refining results without needing to run separate searches.

Search Roll - STRATAMAX ONLINE HELP 1521

Refresh Export List Saved Search: All Roll Positions/ All Buildings

Restrict To	Field	Condition	Value
Columns	Roll Position	is equal to	
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Advanced	Contact Title	contains	
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Is Current, Sorted By Building Name A to Z, Lot Number A to Z, Limited to 10,000 records

Conditions

The *Condition* controls how the search compares the *Value* against each record. The list of conditions available will change depending on the type of field selected. For example, an amount field will provide numeric comparisons, while a date field will provide date-based options. If a condition mentioned below is not visible, it is not available for that field type.

Text and list fields

Fields that hold text or a selectable list of options (for example *Status*, *Account Manager*, or *Building Name*) provide the following conditions:

Condition	Returns records where the field...
<i>is equal to</i>	matches the value exactly
<i>is not equal to</i>	does not match the value
<i>contains</i>	includes the value anywhere within it
<i>does not contain</i>	does not include the value anywhere
<i>is any of</i>	matches any one of the selected values
<i>is not any of</i>	matches none of the selected values

Some text fields also provide *starts with* and *is empty*, which can be helpful when searching for records with incomplete information.

Number and amount fields

Fields that hold amounts, balances, or quantities (for example *Invoice Amount* or *Outstanding*) provide the following conditions:

Condition	Returns records where the amount...
<i>is equal to</i>	matches the value exactly
<i>is in the range</i>	falls between the two values entered

<i>is greater than</i>	is more than the value
<i>is less than</i>	is less than the value
<i>is greater than or equal to</i>	is the value or more
<i>is less than or equal to</i>	is the value or less
<i>is not equal to</i>	is anything other than the value
<i>is empty / is not empty</i>	has no value recorded / has any value recorded

To search for amounts between two figures, use *is in the range* and enter both the lower and upper amounts.

Yes/No fields

Fields that record a Yes/No setting (for example *Current Building*, *Deleted*, or *Audit Done (Last Year)*) use the *is equal to* condition with *Yes* and *No* options. Select the required option and click *Refresh*.

Date fields

Date fields (for example *Due Date* or *Date Issued*) use conditions such as *is equal to*, *is greater than* (after a date), or *is less than* (before a date). The *Value* can then be set in one of two ways:

1. **Choose a set period.** The value list provides a set of fixed periods: *Today*, *Tomorrow*, *Yesterday*, *1 week in the future*, *1 week in the past*, *2 weeks in the future*, *2 weeks in the past*, *1 Month in the future*, *1 Month in the past*, *6 Months in the future*, *6 Months in the past*, *1 Year in the future*, and *1 Year in the past*. These periods are calculated automatically from today's date each time the search is refreshed, which makes them ideal for saved searches that should always reflect the current period.
2. **Enter a specific date.** If the timeframe needed is not one of the set periods, tick *Specific Dates* and enter the exact date required.

Condition Examples

The examples below show how the conditions apply for the different field types when building a search.

Example 1 — Work orders issued in the last month (set period)

1. Open **Search Work Orders** and in *Restrict To*, add the *Date Issued* field.
2. Set the *Condition* to *is greater than* and in the *Value* list, select *1 Month in the past*
3. Click *Refresh*.

Because a set period is used, the saved search will always show the most recent month when refreshed.

Example 2 — Levies due in the last five years (specific date)

1. Open **Search Levies** and in *Restrict To*, add the *Due Date* field.
2. Set the *Condition* to *is greater than*, tick *Specific Dates*, and enter the date five years ago.
3. Click *Refresh*.

Because five years is not one of the set periods, a specific date is used instead.

Example 3 — Levies due within a date range (same field twice)

1. Open **Search Levies** and in *Restrict To*, add the *Due Date* field, set the *Condition* to *is greater than*, tick *Specific Dates*, and enter the start date.
2. Add the *Due Date* field again, set the *Condition* to *is less than*, tick *Specific Dates*, and enter the end date.
3. Click *Refresh*.

Example 4 — Creditor invoices between two amounts (is in the range)

1. Open **Search Creditor Invoice Items** and in *Restrict To*, add the *Invoice Amount* field.
2. Set the *Condition* to *is in the range* and enter the lower and upper amounts.
3. Click *Refresh*.

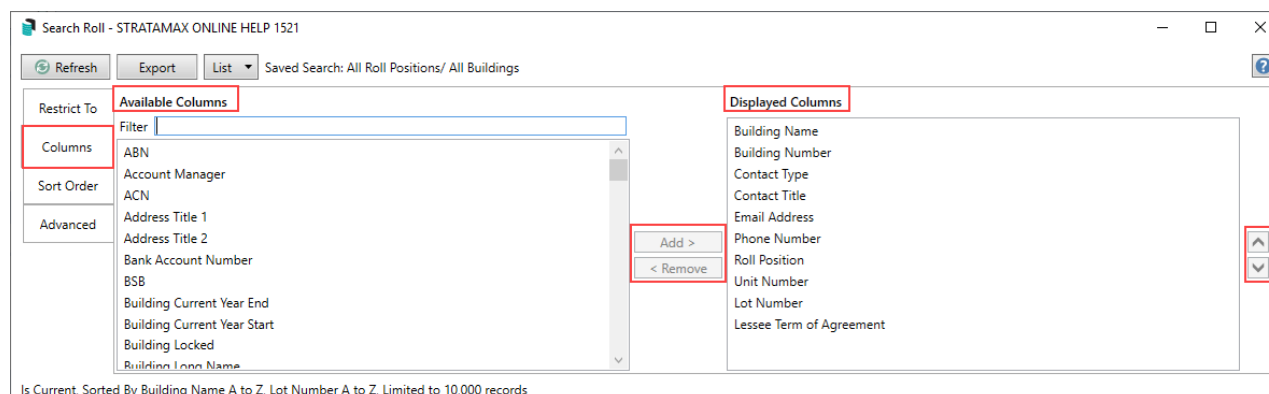
The available *Condition* and *Value* options will always reflect the field selected, so if an option described above is not shown, check the field type that has been chosen.

Columns

The *Columns* tab is used to choose which fields are displayed in the search results. This can be used to show only the information needed for review, reporting, or export.

1. In the *Available Columns* list, select the column to be added.
2. Click *Add >* to move it to the *Displayed Columns* list.
3. To remove a column, select it in the *Displayed Columns* list and click *< Remove*.
4. To change the order of the displayed columns, select a column and use the *up* or *down* arrows.

The order of the columns in the *Displayed Columns* list determines the order they appear in the search results.

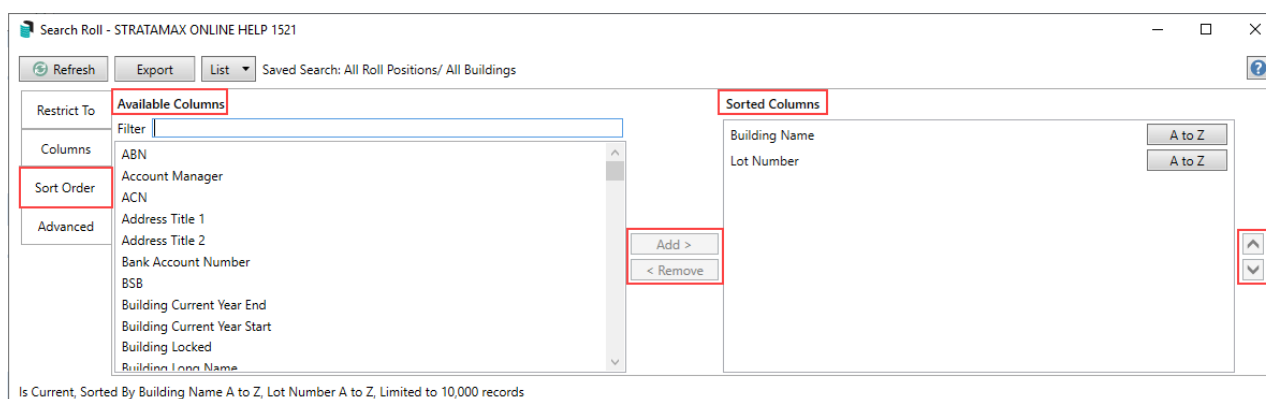


Sort Order

The *Sort Order* tab is used to control the order in which the search results are displayed. This can assist with reviewing records in a more useful order.

1. In the *Available Columns* list, select the column to sort by.
2. Click *Add >* to move it to the *Sorted Columns* list.
3. To remove a sorted column, select it in the *Sorted Columns* list and click *< Remove*.
4. To change the order of the sorted columns, select a column and use the *up* or *down* arrows.
5. Set the required sort direction for each column.
6. Click *Refresh* to apply the updated sort order.

The sort order may also be changed by clicking a column heading in the search results. When selected, the heading will indicate the current sort direction.



Advanced

The *Advanced* tab provides additional search options to assist with larger result sets or when reviewing search criteria.

1. If the results exceed the default 1000, use the *Maximum Number of Records to Retrieve* to increase the number of results returned.
2. Select *Auto Start Search When Opened* to start the search automatically when opened.
3. Select *Show description of search parameters* to display a summary of the search criteria on screen.
4. Click *Refresh* to apply the updated settings.

If *Show description of search parameters* is unticked, the description will no longer appear, but the search results will remain the same.

Search Roll - STRATAMAX ONLINE HELP 1521

Refresh Export List Saved Search: All Roll Positions/ All Buildings

Restrict To Maximum Number of Records to Retrieve 10000

Columns

Sort Order

Advanced

☐ Auto Start Search When Opened

☒ Show description of search parameters

Is Current, Sorted By Building Name A to Z, Lot Number A to Z, Limited to 10,000 records

Use multiple conditions for the same field

Searches can include the same field more than once, allowing different values or conditions to be used in the one search. This can be used with conditions such as *is equal to*, *starts with*, *is any of*, and *is empty*.

1. Open the required search.
2. In *Restrict To*, add the required field.
3. If needed, add the same field again.
4. Enter the required condition and value for each field.
5. If required, open *Advanced* and select *Show description of search parameters*
6. Click *Refresh*.
7. Review the search results and, if selected, the description shown on screen.

Grouped Summary Options

Grouped View provides a way to summarise search results by grouping records using selected fields. This can assist users when reviewing larger datasets by providing a higher-level view without requiring them to export the results first. There are some fields not available, but most are included.

Users can switch between the standard *List View* and *Grouped View* at the top of the search screen. Once *Grouped View* is selected, the required columns can be set up and the grouped results displayed. Grouped searches can also be saved, printed, or exported for reporting. Grouped searches are not available to add to the Dashboard at this stage.

Local Transactions - STRATAMAX ONLINE HELP 1521

Refresh Export Grouped

Restrict To

Field	Condition	Value
Year	is equal to	Current Year (01/01/2026-31/12/2026)
Date	is equal to	☒ Specific Dates
Account Code	is any of	012, 01301, 01302, 01401, 01402
Description	contains	

Year is equal to Current Year (01/01/2026-31/12/2026), Account Code is any of 012 or 01301 or 01302 or 01401 or 01402, Sorted By Id Lowest First, Limited to 1,000 records

Local Transactions - STRATAMAX ONLINE HELP 1521

Refresh Export Grouped

Restrict To

Columns

Sort Order

Advanced

Available Columns

Filter

Account Category

Account Classification

Account Code

Account Description

Account Group

Account Manager

Account Type

Amount

BAS End Date

Batch No

Building Current Year End

Add >

< Remove

Displayed Columns

Account Code

Fund Name

Amount

Grouped

Grouped

Sum

Up

Down

Year is equal to Current Year (01/01/2026-31/12/2026), Account Code is any of 012 or 01301 or 01302 or 01401 or 01402, Sorted By Id Lowest First, Limited to 1,000 records

Local Transactions - STRATAMAX ONLINE HELP 1521

Refresh Export Grouped

Restrict To

Columns

Sort Order

Advanced

Available Columns

Filter

Fund Name

Amount (Sum)

Add >

< Remove

Sorted Columns

Account Code

A to Z

Up

Down

Year is equal to Current Year (01/01/2026-31/12/2026), Account Code is any of 012 or 01301 or 01302 or 01401 or 01402, Sorted By Id Lowest First, Limited to 1,000 records

4 records displayed

Account Code	Fund Name	Amount (Sum)
012	Admin Fund	538,260.08
012	Sinking Fund	4,555.73
01301	Admin Fund	5,000.00
01401	Sinking Fund	5.00

Find First Find Next

Saved searches and Dashboard items

Once a search has been set up, it can be saved and used again later. This can be helpful for regular tasks or commonly used reporting requirements.

1. Set up the search using the required tabs.
2. Click *Save Search As* to save the search. Enter a *Name* for the search.
 - Available to current user only - only available to the user who has created the search.
 - Available to users in a security group - provides an option to set it for a group that the user is a member of.
 - Available to all users - allows all users to access this search.
3. To use a saved search again, click *Load/Edit/Delete Search* and select the required search.
4. If you update a saved search, click *Save Search* to save the changes.
5. If required, click *Add Dashboard Item* to make the saved search available from the **Dashboard**. To access this from an existing search, click the  icon and click the *Add to My Dashboard* button.

Save as Default

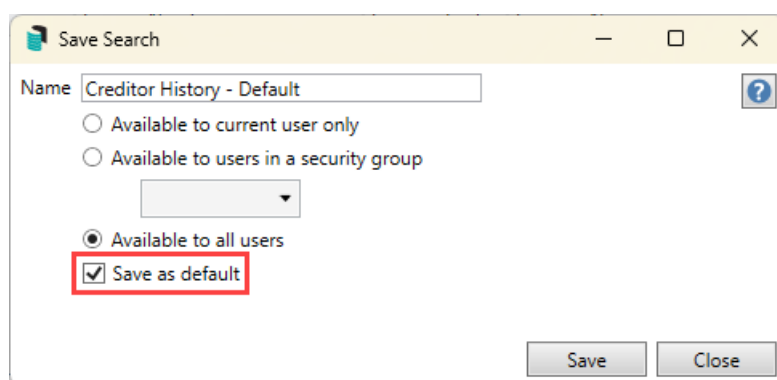
Search settings can be saved as the default when a search is used regularly. The saved **Restrict To**, **Columns**, **Sort Order** and **Advanced** tab settings are applied automatically whenever the search is opened and available to the user using the search icon, removing the need to select **Load/Edit/Delete Search**.

For example, a default search can be used to sort creditor history from newest to oldest. When the

creditor invoice history is displayed, the most recent invoices will appear at the top of the list.

Not all saved searches can be added to the Dashboard. If this option is unavailable for a particular search, the **Add to Dashboard** button will not appear in the save search window.

1. Set up the search using the required tabs.
2. Click *Save Search As* to save the search. Enter a *Name* for the search.
 - Available to current user only - only available to the user who has created the search.
 - Available to users in a security group - provides an option to set it for a group that the user is a member of.
 - Available to all users - allows all users to access this search.
3. Tick *Save as default*.



The screenshot shows a 'Save Search' window. The 'Name' field is 'Creditor History - Default'. There are three radio buttons for availability: 'Available to current user only', 'Available to users in a security group', and 'Available to all users' (which is selected). Below these is a dropdown menu. A checkbox labeled 'Save as default' is checked and highlighted with a red rectangle. At the bottom right are 'Save' and 'Close' buttons.

DocMax searches

In **DocMax**, multiple conditions can also be used for the same field in [Advanced Search](#). The search will return matching results in the same way; however, the description of search parameters is not displayed on screen.

Searches available

<i>Local and Global Debtors</i>	<i>Local Transactions</i>	<i>Global Transactions</i>
<i>Search Bank Accounts</i>	<i>Search Bank Statement History</i>	<i>Search BAS</i>
<i>Search Building Info History</i>	<i>Search Buildings</i>	<i>Search Contacts</i>
<i>Search Contracts</i>	<i>Search Creditor Invoice Items</i>	<i>Search Creditors</i>
<i>Search Income Tax</i>	<i>Search Inspections</i>	<i>Search Insurance</i>
<i>Search Insurance Claims</i>	<i>Search Levies</i>	<i>Search Local and Global Accounts</i>
<i>Search Meetings</i>	<i>Search Office Bearers</i>	<i>Search Pay Employees</i>
<i>Search Payments</i>	<i>Search Quotes</i>	<i>Search Recoveries</i>
<i>Search Roll</i>	<i>Search Work Orders</i>	<i>Organisation - Searches</i>

