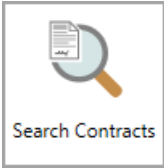


Search Contracts

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

Search Contracts is used to search data recorded in the **Contracts** register across your portfolio.

This search assists with quickly identifying and reporting items such as contracts that are coming up for termination and other contract register information. Results can be saved for ongoing use, exported to Excel, or converted to 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 Contracts | Security

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

Search Contracts | What it can report on

Search Contracts can report on records in the **Contracts** register across your portfolio, using predefined values recorded against each contract.

This is useful when you need to review contract register information, identify contracts that are due for termination, or produce a list for reporting and export.

Search Contracts | Recommended search examples

Find contracts that are coming up for termination


This search can be used to identify contracts that are due for termination so they can be reviewed and reported on.

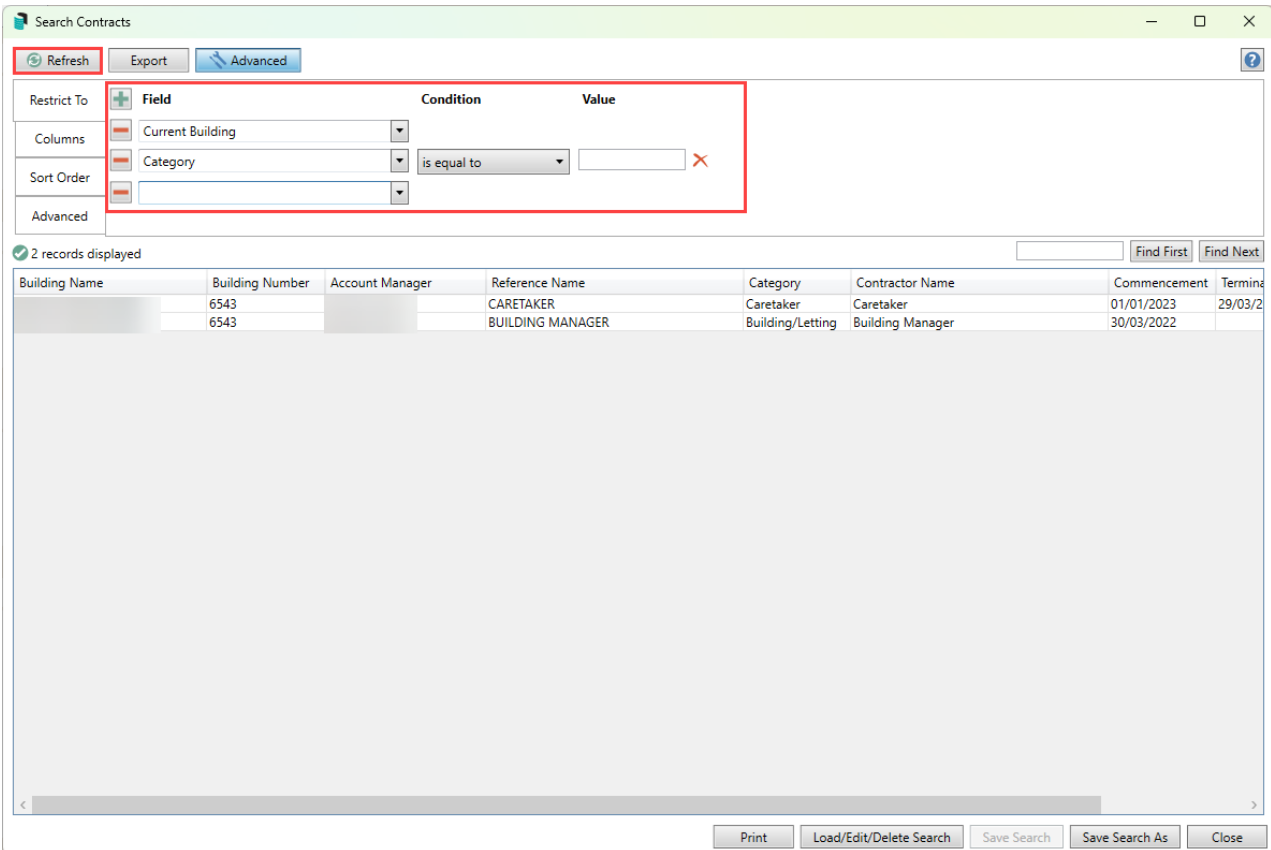
1. Search for or select **Search Contracts**.
2. Review the default restriction fields of *Current Building* and *Category*.
3. Add or change the required field so the search targets the contract records you need to review.

4. Select the required *Condition* and *Value*.
5. Click *Refresh* to display the results.

Report on contracts by category

This search can assist with reporting on a specific contract category type from the **Contracts** register.

1. Search for or select **Search Contracts**.
2. Use the default *Category* field to select the required category type from the *Restrict To* tab.
3. If needed, click the  button and add another field.
4. Select the required *Condition* and *Value*.
5. Click *Refresh* to load the results.
6. Click *Export* to export to Excel when required, or *Print* to generate a PDF report.



The screenshot shows the 'Search Contracts' application window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. Below these is a 'Restrict To' section with a table for adding filters:

Field	Condition	Value
Current Building		
Category	is equal to	

Below the filter table, it says '2 records displayed'. The results are shown in a table:

Building Name	Building Number	Account Manager	Reference Name	Category	Contractor Name	Commencement	Termination
	6543		CARETAKER	Caretaker	Caretaker	01/01/2023	29/03/2022
	6543		BUILDING MANAGER	Building/Letting	Building Manager	30/03/2022	

At the bottom of the window, there are buttons for 'Print', 'Load/Edit/Delete Search', 'Save Search', 'Save Search As', and 'Close'.

Search contracts across the portfolio

This search can be used to report on contracts across the entire portfolio, rather than only the current building.

1. Search for or select **Search Contracts**.
2. Remove the default *Current Building* field or change it to another field.
3. Set the required *Condition* and *Value*.
4. Click *Refresh* to display contract items across the portfolio.