# Activity Report/ Annual Summary

Last Modified on 15/05/2026 10:50 am AEST

The information in this article relates to the setup of the Activity Report/Annual Summary, which is available from all Report Distribution interfaces, such as ***Report Sets*** or ***Merge Letters***.

This report consolidates key operational data captured in StrataMax—such as communications, financial processing, compliance actions, and service delivery—into a single, structured view. It allows information to be presented by category in a pie chart and by month for income and expenditure in a bar chart for the date range. It also allows other supporting reports and documents to be added, with the option to save as a *Report Set* for regular use.

The report aligns with the intent of existing state-specific legislative reporting, such as NSW delegated function reporting and WA annual reporting, as well as for more generic purposes. By using charts and visual summaries, the report makes it easier to interpret activity levels, identify trends, and explain management workload to committees and owners.

Where flexibility is required, activity counts can also be made available as merge fields, enabling clients or internal users to build customised reports and combine these metrics with additional reporting outputs as needed.

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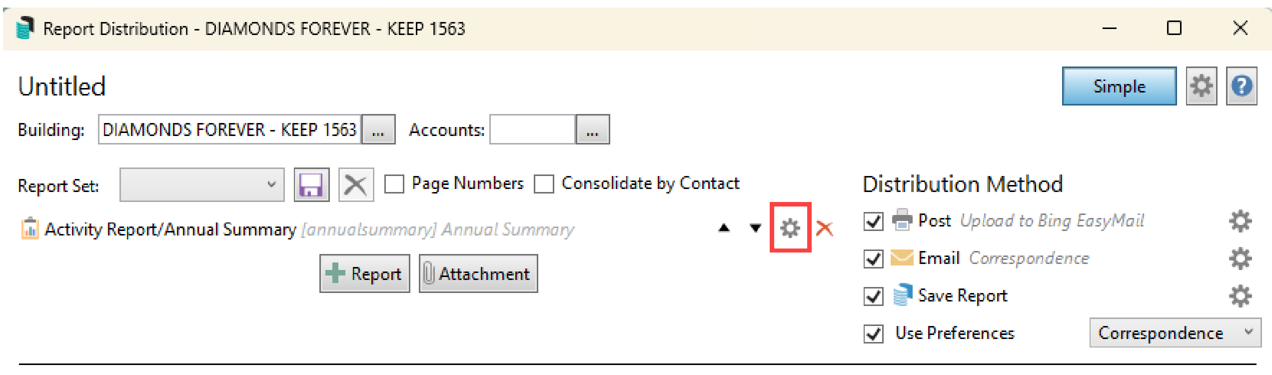
## Configuration

To access the Activity Report configuration, add the report to any ***Report Distribution*** screen and select the configuration icon. For regular reporting as set up, it is recommended to save the report(s) as a *Report Set*.



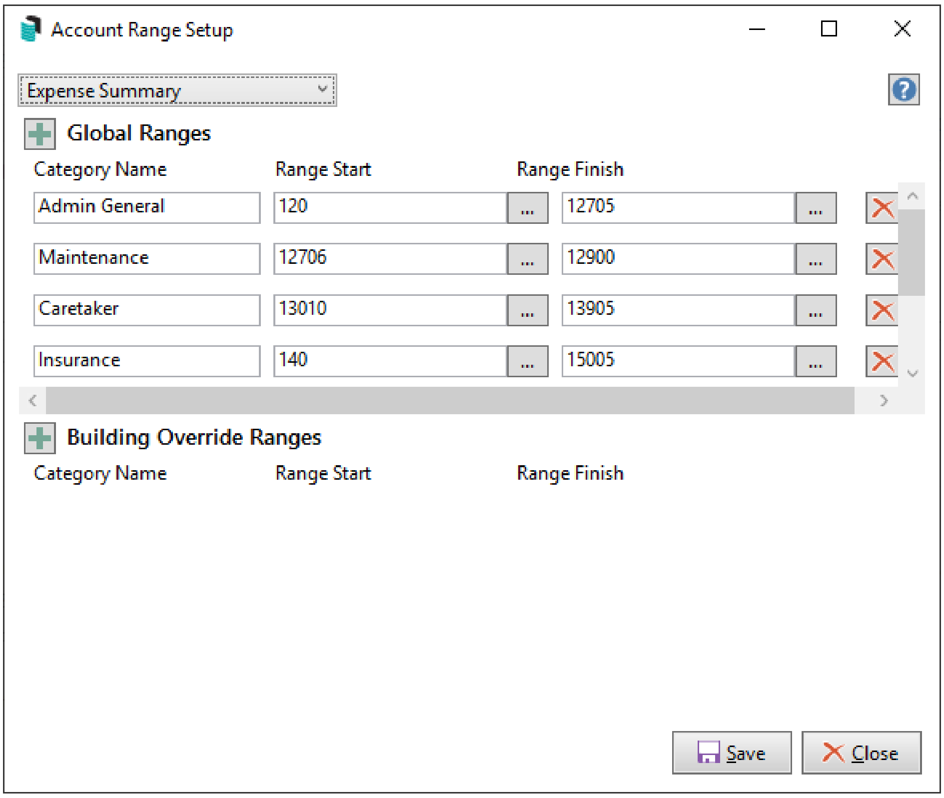

1. From the cogwheel settings:

   **From and To Date:** Set the required Dates. If both are left blank, the current financial year will be used.

**Report Title:** Set the required *Report Title* used in the template.

## Expense Summary Setup

Set up the *Global Ranges* (or *Building Override Ranges* if required) by following the steps below. These are used to present *Expenses by Category* within the *Financial Overview* area.



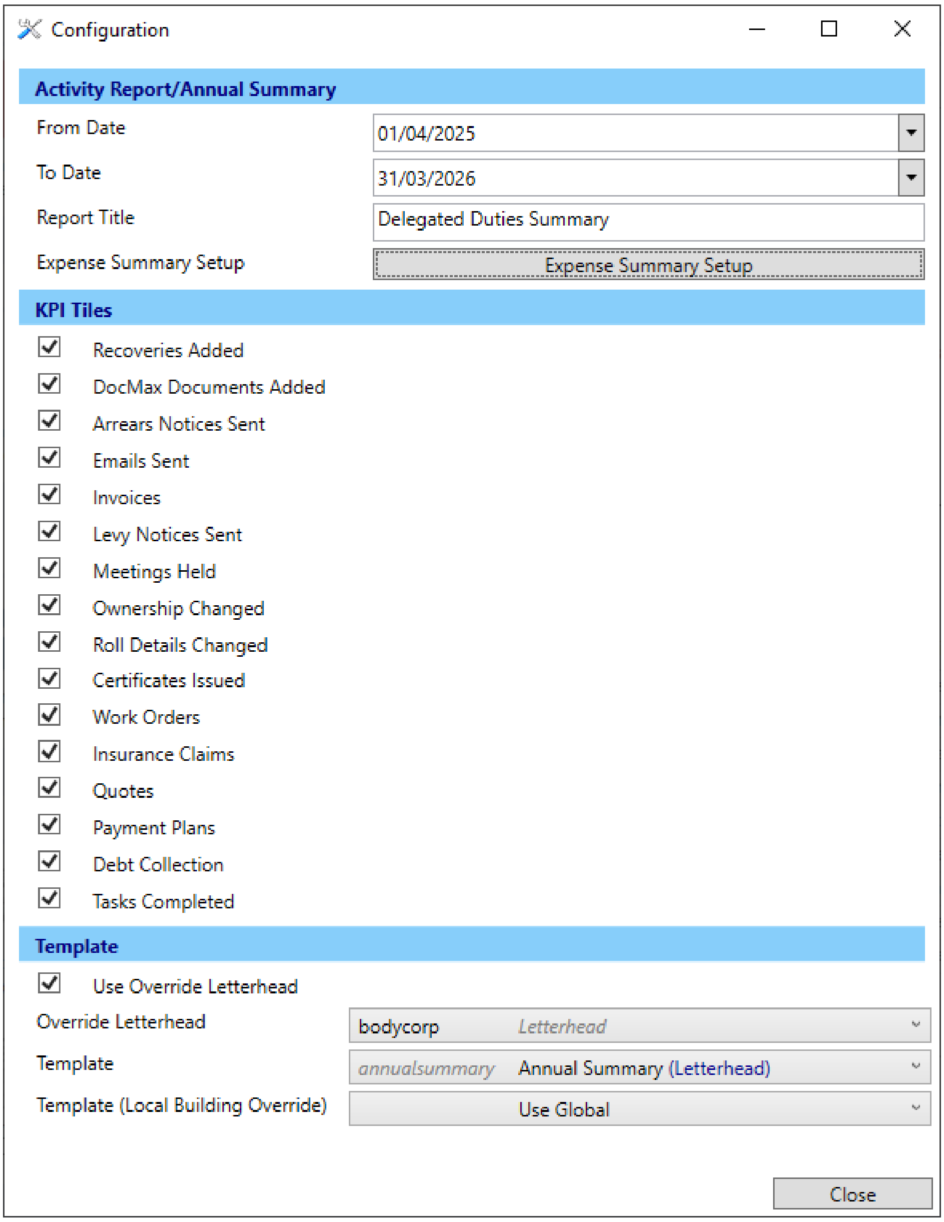

1. Click *Expense Summary Setup*.
2. Click the green + icon to set up a range of account codes and enter a category name.
3. Select the ... Range Start and select the first account code of the range, and click*OK*.
4. Select the ... Range Finish, then select the last account code in the range, and click*OK*.
5. Add additional categories and ranges as required.
6. To delete an account code range, click on the red X.
7. Click on Save.

## KPI Tiles

Select the tiles required to be included in the report. The tile in the report will display the count of activity for the entered date range.

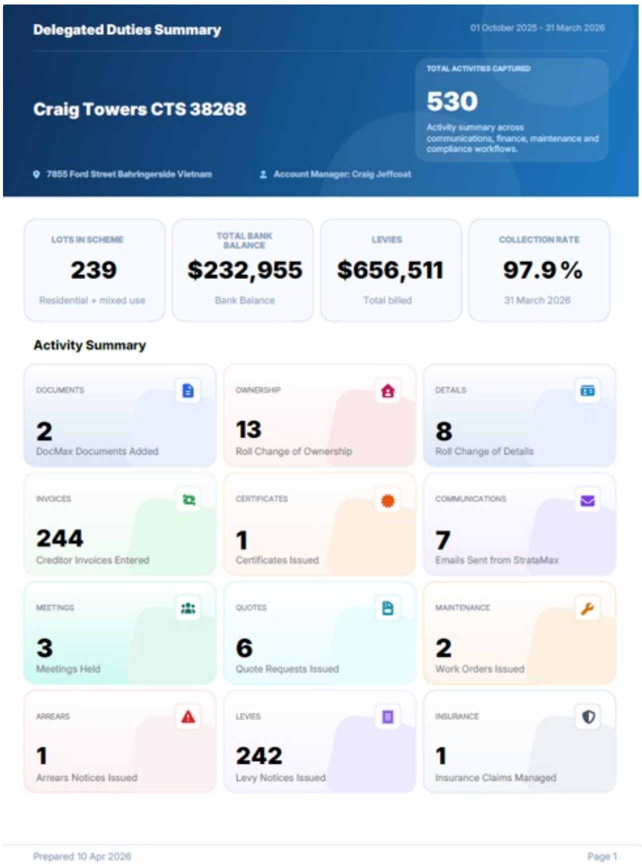
- Recoveries Added - based on TRMax date.
- DocMax Documents Added - based on the DocMax added date.
- Arrears Notice Sent - based on the date of the arrears notice issued.
- Emails Sent - based on the date the email is sent from StrataMax.
- Invoices - based on the date of the creditor invoice.

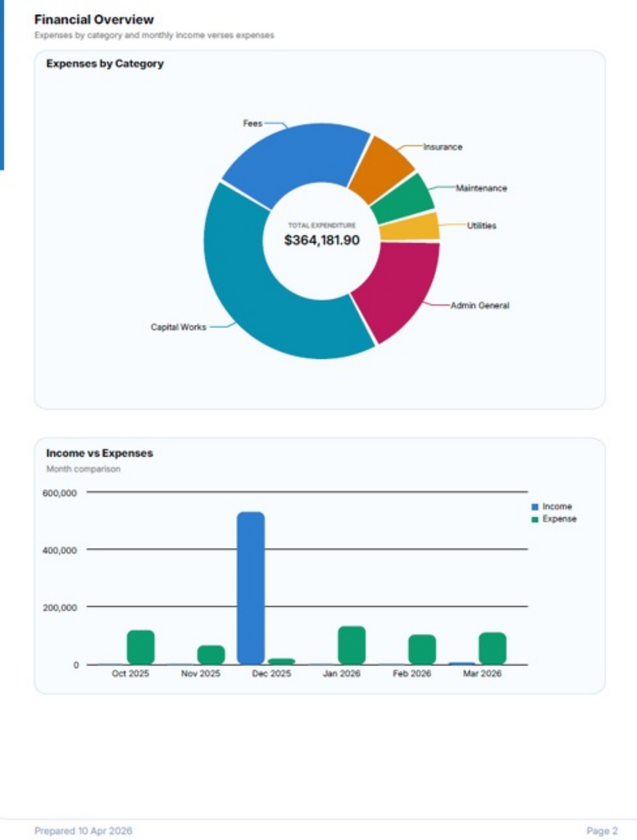
- Levy Notices Sent - based on the date of the levy notice issued.
- Meetings Held - based on the date of meetings in the Meeting Summary.
- Ownership Changed - based on the date of receipt of notice.
- Roll Details Changed - based on the date of receipt of notice.
- Certificates Issued - based on the date the certificate was issued by StrataMax.
- Work Orders - based on the date the work order is issued.
- Insurance Claims - based on the date the insurance claim is lodged.
- Quotes - based on the date the quote request is sent.
- Payment Plans - based on the date a lot is entered into Legal Action / Payment Plans.
- Debt Collection - based on the date a lot is entered into Legal Action.
- Tasks Completed - based on the completed date of tasks in Task Management.



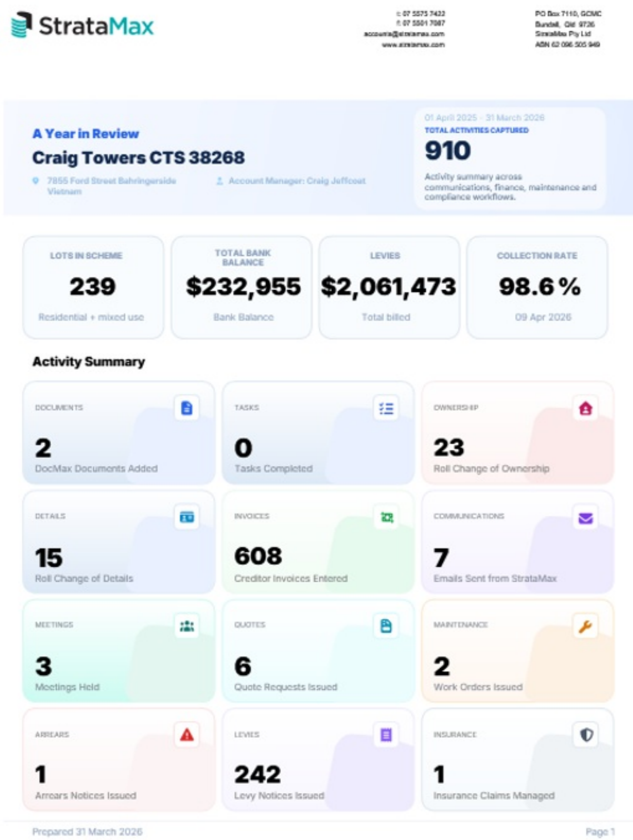

## Examples and Letterhead

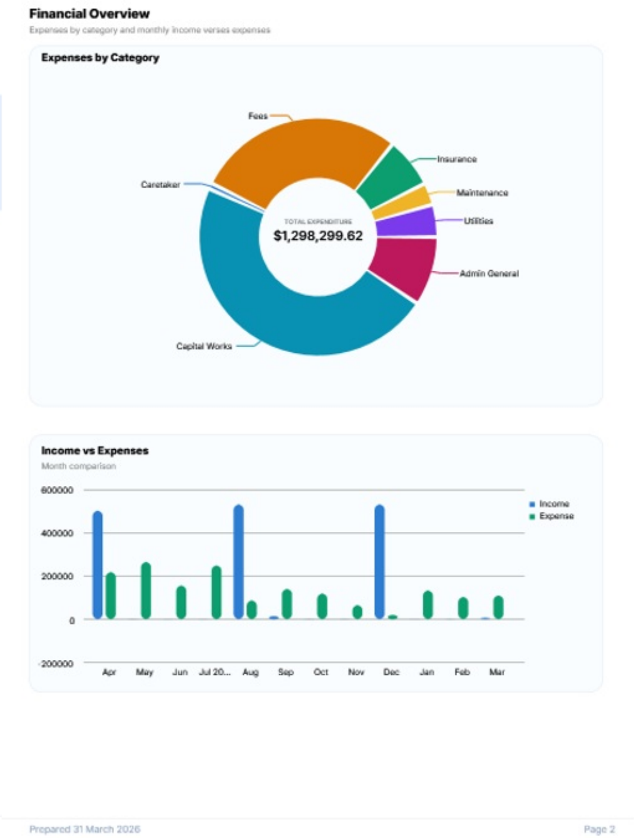
## Example report without a letterhead:




## Example report with a letterhead:

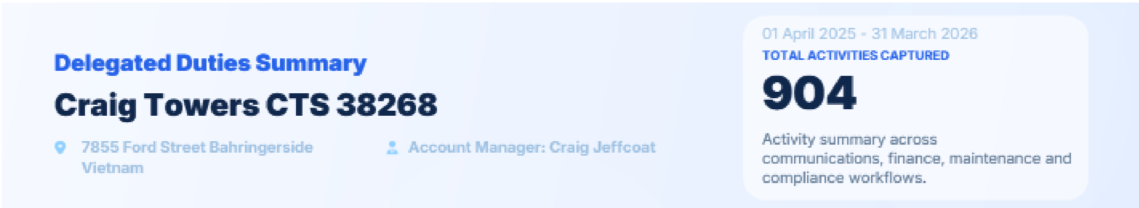


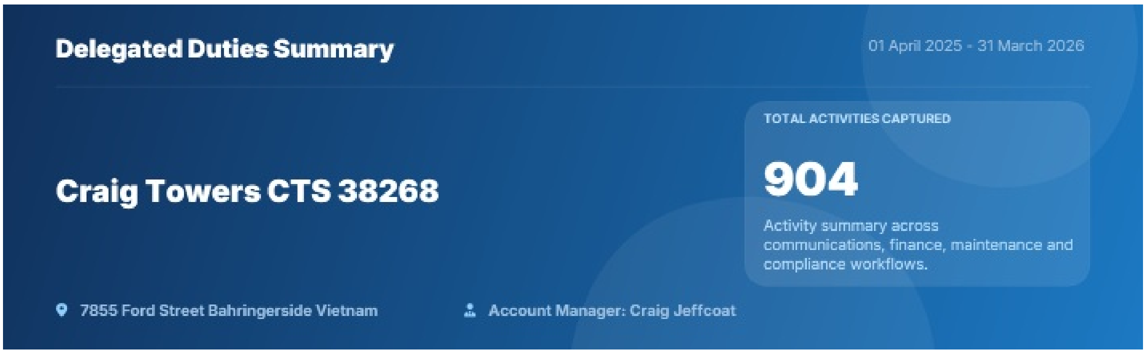
## Letterhead

The template used will depend on whether the letterhead is included and is set in the cogwheel within the Activity Report/Annual Report area.

Letterhead included:


Letterhead Override set to blank:




# FAQ

**Q.** Are additional reports available to provide more information for specific KPI tiles?
**A.** Yes, the reports below are available from the report distribution menus that would be suitable.It is recommended to save a report set including the required reports and the date range entered in the configuration, for the Activity Report/Annual Summary will be used on all reports.

- Meetings
- Arrears Issued
- Legal Action (Building Status)
- Payment Plan (Building Status)
- Work Orders (Building)
- Work Quotes (Building)

**Q.** We use external applications/systems such as Outlook and ResVu that we would like to include information from; can this be included on the Activity Report/Annual Statement?

**A.** External information can be included within a merge letter that may form part of the report set or separately be attached by clicking on *Attachment* and adding any additional reports you may require.