

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](#).

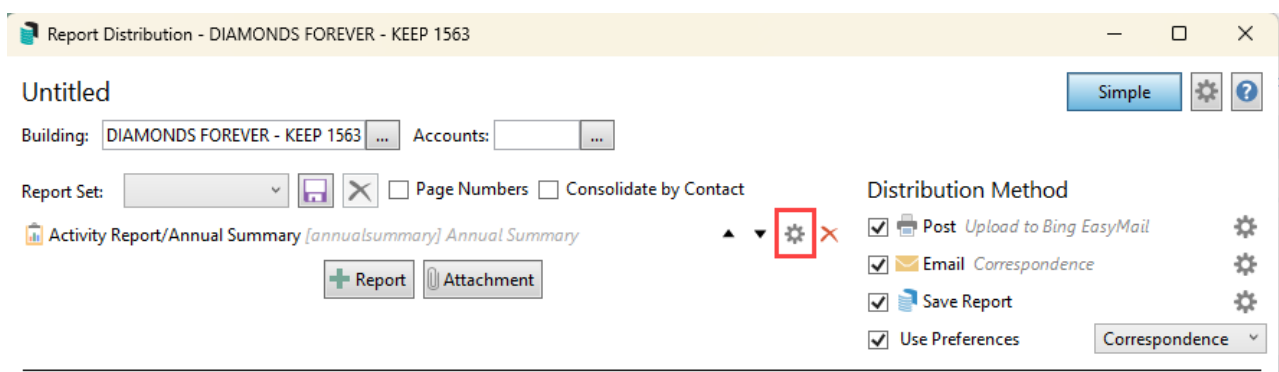
This report consolidates key operational data captured in StrataMax—such as communications, financial processing, compliance actions, and service delivery—into a single, structured view. It allows information to be presented by category in a pie chart and by month for income and expenditure in a bar 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.

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*.



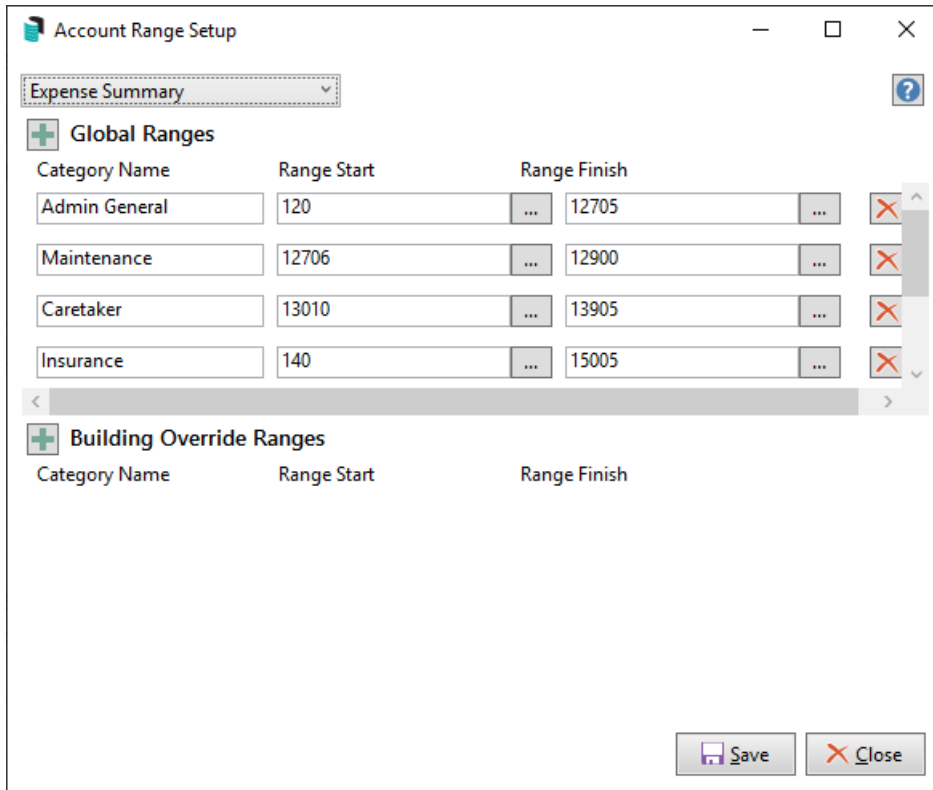
1. From the cogwheel settings:

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.



The screenshot shows the 'Account Range Setup' window. At the top, there is a dropdown menu set to 'Expense Summary' and a help icon. Below this, there are two sections: 'Global Ranges' and 'Building Override Ranges'. The 'Global Ranges' section contains a table with four rows of data. Each row has a 'Category Name' field, a 'Range Start' field with a selection icon, and a 'Range Finish' field with a selection icon. To the right of each row is a red 'X' icon for deletion. The 'Building Override Ranges' section is currently empty. At the bottom right, there are 'Save' and 'Close' buttons.

Category Name	Range Start	Range Finish
Admin General	120	12705
Maintenance	12706	12900
Caretaker	13010	13905
Insurance	140	15005

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.

✖ Configuration
— □ ×

Activity Report/Annual Summary

From Date

To Date

Report Title

Expense Summary Setup

KPI Tiles

- Recoveries Added
- DocMax Documents Added
- Arrears Notices Sent
- Emails Sent
- Invoices
- Levy Notices Sent
- Meetings Held
- Ownership Changed
- Roll Details Changed
- Certificates Issued
- Work Orders
- Insurance Claims
- Quotes
- Payment Plans
- Debt Collection
- Tasks Completed

Template

Use Override Letterhead

Override Letterhead

Template

Template (Local Building Override)

Examples and Letterhead

Example report without a letterhead:

Delegated Duties Summary 01 October 2025 - 31 March 2026

Craig Towers CTS 38268 **530**
TOTAL ACTIVITIES CAPTURED

Activity summary across communications, finance, maintenance and compliance workflows.

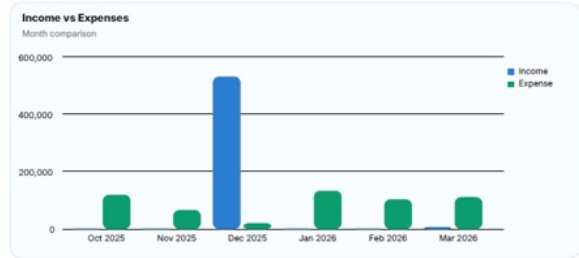
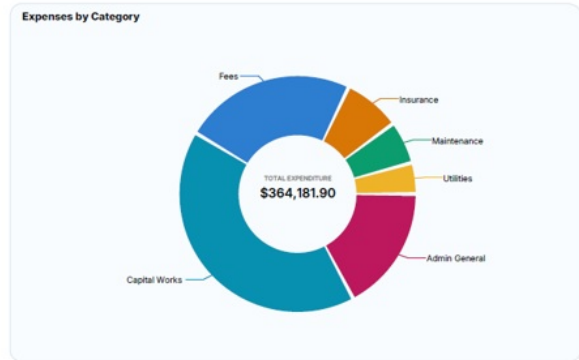
7855 Ford Street Bahringerside Vietnam | Account Manager: Craig Jeffcoat

LOTS IN SCHEME 239 <small>Residential + mixed use</small>	TOTAL BANK BALANCE \$232,955 <small>Bank Balance</small>	LEVIES \$656,511 <small>Total billed</small>	COLLECTION RATE 97.9% <small>31 March 2026</small>
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Activity Summary

DOCUMENTS 2 <small>DocMax Documents Added</small>	OWNERSHIP 13 <small>Roll Change of Ownership</small>	DETAILS 8 <small>Roll Change of Details</small>
INVOICES 244 <small>Creditor Invoices Entered</small>	CERTIFICATES 1 <small>Certificates Issued</small>	COMMUNICATIONS 7 <small>Emails Sent from StrataMax</small>
MEETINGS 3 <small>Meetings Held</small>	QUOTES 6 <small>Quote Requests Issued</small>	MAINTENANCE 2 <small>Work Orders Issued</small>
ARREARS 1 <small>Arrears Notices Issued</small>	LEVIES 242 <small>Levy Notices Issued</small>	INSURANCE 1 <small>Insurance Claims Managed</small>

Financial Overview
Expenses by category and monthly income versus expenses



Example report with a letterhead:



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accounts@stratamax.com
www.stratamax.com

PO Box 7110, GCMC
Bunburry, Qld 4736
StrataMax Pty Ltd
ABN 62 056 505 949

A Year in Review 01 April 2025 - 31 March 2026

Craig Towers CTS 38268 **910**
TOTAL ACTIVITIES CAPTURED

Activity summary across communications, finance, maintenance and compliance workflows.

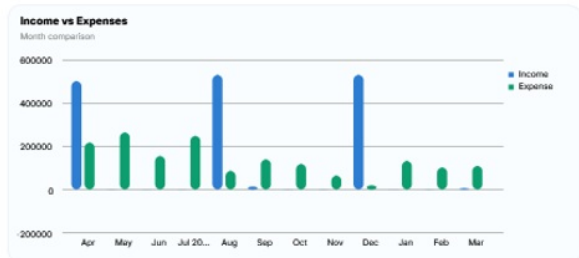
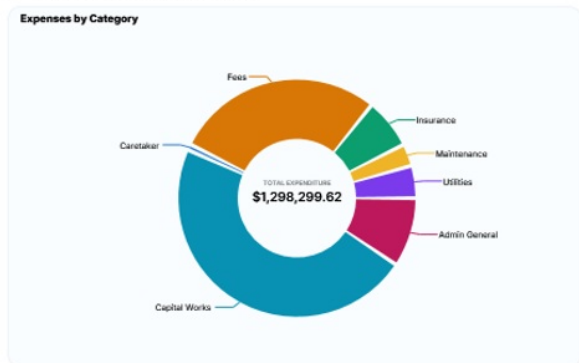
7855 Ford Street Bahringerside Vietnam | Account Manager: Craig Jeffcoat

LOTS IN SCHEME 239 <small>Residential + mixed use</small>	TOTAL BANK BALANCE \$232,955 <small>Bank Balance</small>	LEVIES \$2,061,473 <small>Total billed</small>	COLLECTION RATE 98.6% <small>09 Apr 2026</small>
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Activity Summary

DOCUMENTS 2 <small>DocMax Documents Added</small>	TASKS 0 <small>Tasks Completed</small>	OWNERSHIP 23 <small>Roll Change of Ownership</small>
DETAILS 15 <small>Roll Change of Details</small>	INVOICES 608 <small>Creditor Invoices Entered</small>	COMMUNICATIONS 7 <small>Emails Sent from StrataMax</small>
MEETINGS 3 <small>Meetings Held</small>	QUOTES 6 <small>Quote Requests Issued</small>	MAINTENANCE 2 <small>Work Orders Issued</small>
ARREARS 1 <small>Arrears Notices Issued</small>	LEVIES 242 <small>Levy Notices Issued</small>	INSURANCE 1 <small>Insurance Claims Managed</small>

Financial Overview
Expenses by category and monthly income versus expenses



Letterhead

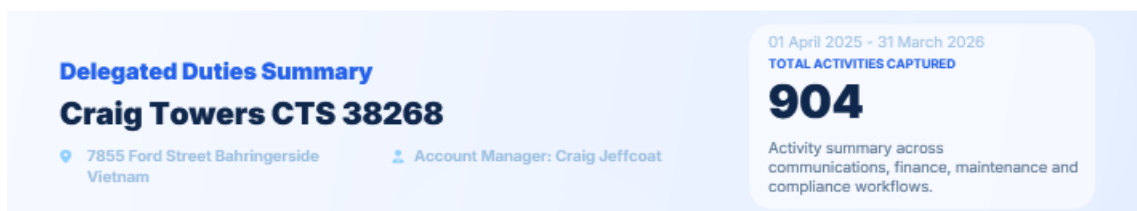
The template used will depend on whether the letterhead is included and is set in the cogwheel within the Activity Report/Annual Report area.

Letterhead included:

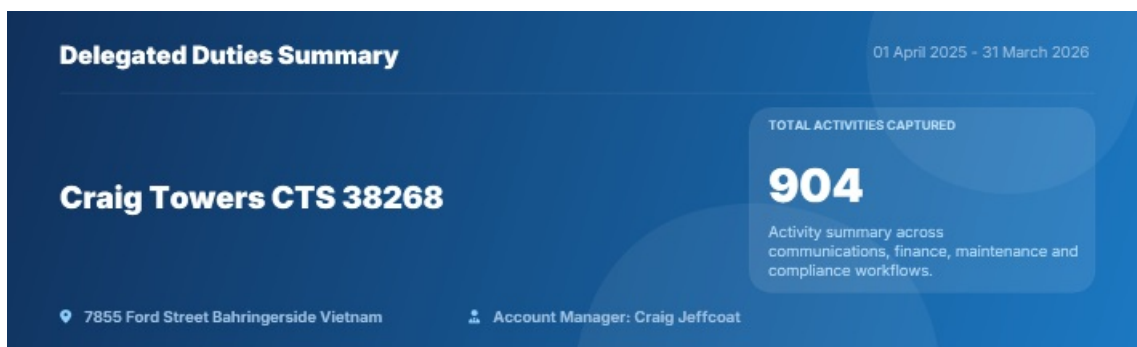


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ABN 62 096 505 949



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.