Stored Report

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

StrataMax automatically stores reports such as Levy Notices, Levy Arrears, Certificates, Owner Tax Info Reports and Utility Bills which are available in DocMax to review. A copy of the Financial Statements will be available from Stored Reports. The purpose of storing these reports is to be able to reprint the report exactly as it was printed the first time, without having to keep a photocopy or reproduce it with the current date on it.

Financial Statements are required to be stored if you are attaching them to ***Status Reports***, and will still be available in Stored Reports to refer to.

Enhancements have been made to store all stored reports into DocMax. This will allow users to view these documents in Work Queues as well as upload these documents to the StrataMax Portal. This change will also aim to reduce the BCMax database size for backups.

Types of reports that will now be stored in DocMax are, but will not be limited to:

- Levy Notices
- Ledger Cards
- Arrears Notices
- Invoices
- Financial Reports stored on Month End Rollover
- Status Reports
- Funds Management Reports
- .LET Merge Letters
- Sub Group reports
- Sub Group Invoices
- .DOC (MS Word) Merge Letters

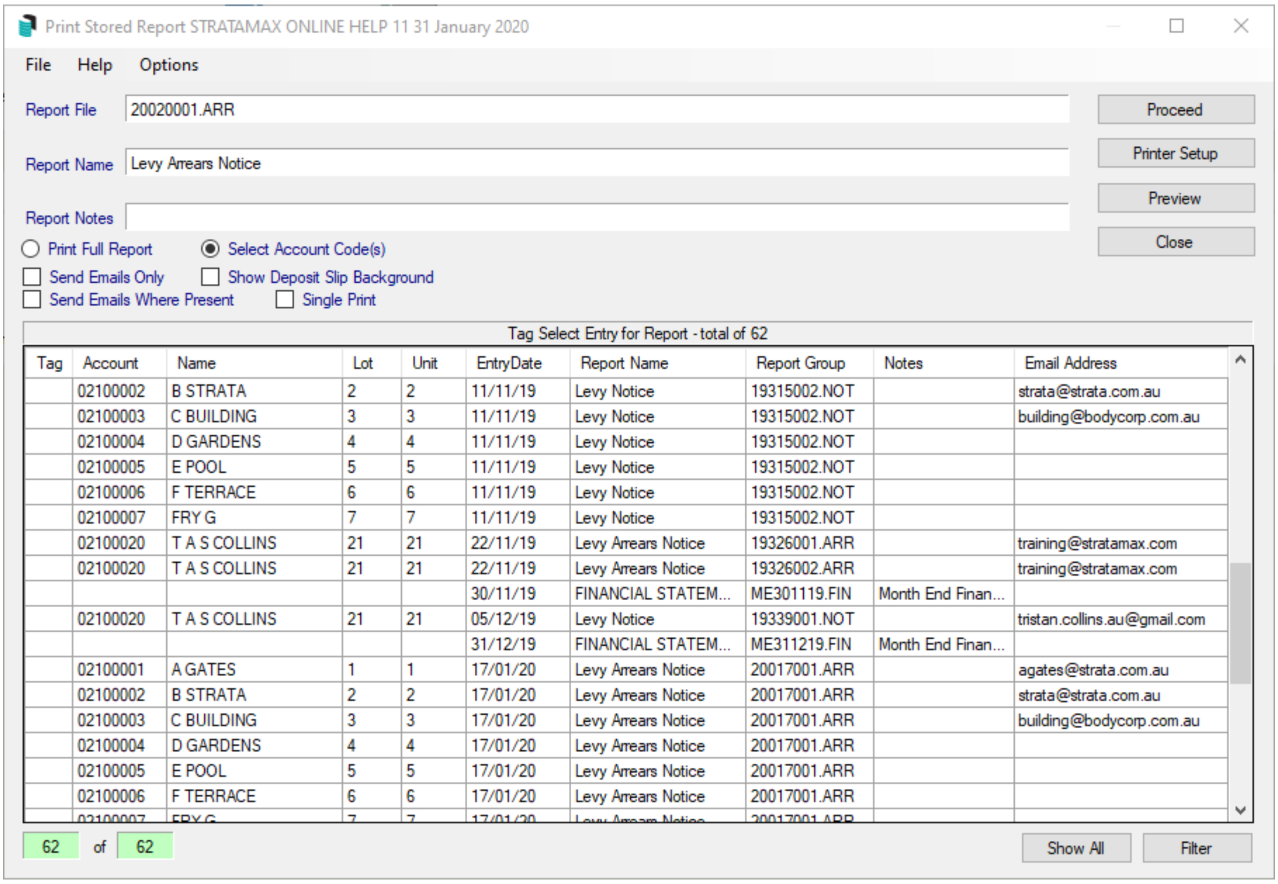
Please note that GLMax reports/documents will not be stored in DocMax, and Management Fee Invoices and Recoveries, if configured, will be. Deleting any of these documents from Stored Reports will also be deleted from DocMax. The same applies if you delete any of these from DocMax - they will also be deleted from Stored Report.

Viewing Stored Report via a DocMax Saved Search.

The information available in ***Stored Reports*** can also be created as a saved search in DocMax and can provide similar columns of information. Click here to review further information on creating this type of saved search.

Accessing Stored Report

1. In the selected building, search or select ***Stored Report.***
2. All stored reports will be displayed for the building. Filter to locate the stored report as desired (i.e. In report name column, sort to Certificates, or Levy Notice etc. You may also sort by Lot and Unit Number).
3. Expand the window for easier viewing.
4. Tag report you wish to reprint.
5. Click *Preview* to view stored report before printing.
6. Report will display, redistribute as desired.



Tag	Account	Name	Lot	Unit	EntryDate	Report Name	Report Group	Notes	Email Address
	02100002	B STRATA	2	2	11/11/19	Levy Notice	19315002.NOT		strata@strata.com.au
	02100003	C BUILDING	3	3	11/11/19	Levy Notice	19315002.NOT		building@bodycorp.com.au
	02100004	D GARDENS	4	4	11/11/19	Levy Notice	19315002.NOT		
	02100005	E POOL	5	5	11/11/19	Levy Notice	19315002.NOT		
	02100006	F TERRACE	6	6	11/11/19	Levy Notice	19315002.NOT		
	02100007	FRY G	7	7	11/11/19	Levy Notice	19315002.NOT		
	02100020	T A S COLLINS	21	21	22/11/19	Levy Arrears Notice	19326001.ARR		training@stratamax.com
	02100020	T A S COLLINS	21	21	22/11/19	Levy Arrears Notice	19326002.ARR		training@stratamax.com
					30/11/19	FINANCIAL STATEM...	ME301119.FIN	Month End Finan...	
	02100020	T A S COLLINS	21	21	05/12/19	Levy Notice	19339001.NOT		tristan.collins.au@gmail.com
					31/12/19	FINANCIAL STATEM...	ME311219.FIN	Month End Finan...	
	02100001	A GATES	1	1	17/01/20	Levy Arrears Notice	20017001.ARR		agates@strata.com.au
	02100002	B STRATA	2	2	17/01/20	Levy Arrears Notice	20017001.ARR		strata@strata.com.au
	02100003	C BUILDING	3	3	17/01/20	Levy Arrears Notice	20017001.ARR		building@bodycorp.com.au
	02100004	D GARDENS	4	4	17/01/20	Levy Arrears Notice	20017001.ARR		
	02100005	E POOL	5	5	17/01/20	Levy Arrears Notice	20017001.ARR		
	02100006	F TERRACE	6	6	17/01/20	Levy Arrears Notice	20017001.ARR		

Proceed
Send the report directly to the printer or will email out. This will be based on the distribution method of the original report and only applies to Levies or Arrears, other reports will print.

Printer Setup
Allows changing of the printer to print to.

Preview
Bring the report to the screen, which will enable you to print or email the report, save it as a PDF, or save it in DocMax.

Close
Closes the screen.

Print Full Report
If this setting is set, the tagged report will print the entire file, including all other reports that were printed with it. For example, a Levy notice tagged for one lot will print all the notices for all other lots in that levy run.

Select Account Codes
Print reports for the selected codes only.

Show a Deposit Slip Background
If this setting is tagged, levies will print or email with the deposit slip overlay added.

Single Print
This setting will print a single report if multiple reports are stored.

Show All
It shows all reports if you have gone to stored reports from another area, e.g. Levies, which just shows only the levies, or if you have used the Filter button.

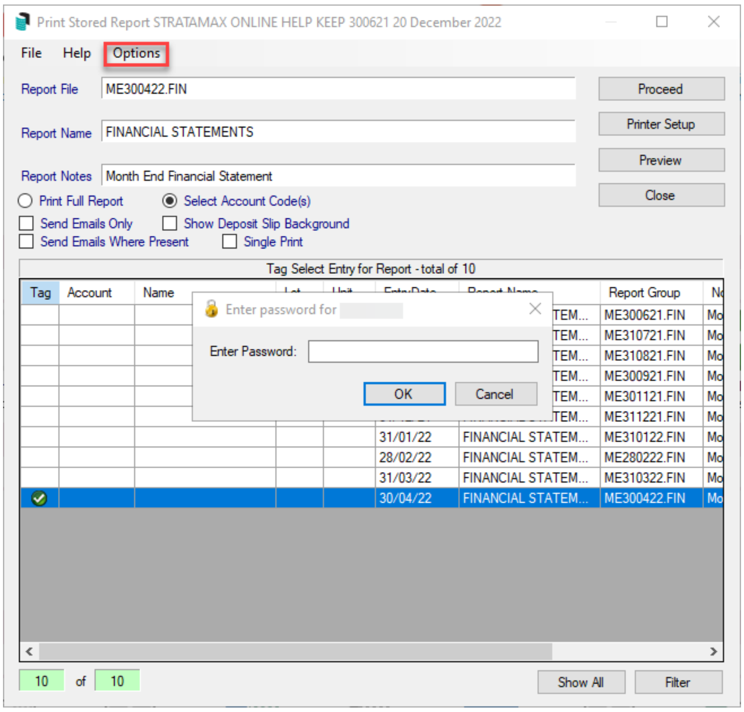
Filter
Allows you to filter for a specific account or report type, etc.

Delete Stored Reports

Please be aware that if you delete any documents from ***Stored Report***, they will also be deleted from ***DocMax***. The same applies if you delete any of the stored reports from DocMax - they will also be deleted from Stored Report.

1. Search or select ***Stored Report.***
2. Stored reports will be displayed for the building. Filter to locate the stored report as desired (i.e. In report name column, sort to Certificates, or Levy Notice etc. You may also sort by Lot and Unit Number).
3. Tag the report/s you wish to delete.
4. Select *Options* and click *Delete Stored Reports.*
5. You will be prompted to enter your user password. Refer to your internal StrataMax Administrator

for assistance if required.



Levy Notice Stored Report

1. Search or select ***Stored Report.***
2. Or from Levy Notice / Reports via 'GoTo' / 'Print Stored Notices' (this will filter only by Levy Notice type reports).
3. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. In report name column, sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Levy Notice or email column).
4. Expand the window for easier viewing.
5. Tag report you wish to reprint.
6. Set any filter options (review Stored Report Functions for further details on this).
7. Click *Preview* to view stored report before printing.
8. Report will display, redistribute as desired.

If there is an email address listed in the *Email Address* field of Stored Report, this confirms that the original report was issued via email and can be viewed in the Communication Log in the ***Communication*** screen.

Arrears Stored Report

1. Search or select ***Stored Report.***
2. Or from Arrears Notice via 'GoTo' / 'Print Stored Notices' (this will filter only by Levy Arrears type reports).
3. Maximise the screen if required.
4. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Entry Date' / 'Report Name' - Levy Arrears or email column).
5. This will then display only arrears notices for filtered account.
6. Tag (click in the tag column field) to select the individual arrears notice.
7. Click *Preview*.
8. Once the Arrears Notice/Letter has displayed to screen, you may then either Print or Email.

The email address column is where the notice/letter was emailed to the owner.

Certificate Stored Report

1. Search or select ***Stored Report.***
2. Or from Certificate via 'GoTo' / 'Print Stored Certificates' (this will filter only by Certificate type reports).
3. Maximise the screen if required.
4. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Certificate 021XXXXX' or email column).
5. This will then display only arrears notices for filtered account.
6. Tag (click in the tag column field) to select the individual Certificate.
7. Click 'Preview'.
8. Once the Certificate has displayed to screen, you may then either Print or Email.

Owner Tax Info Report

This is the one area that can only be accessed via Stored Report and not directly from the menu.

1. Search or select ***Stored Report.***
2. Maximise the screen if required.
3. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Owner's Tax Year' or email column).

4. This will then display only the selected detail for filtered account.
5. Tag (click in the tag column field) to select the individual Owner Tax Year Report.
6. Click *Preview*.
7. Once the Owner Tax Year Report has displayed to screen, you may then either Print or Email as required.

Utility Stored Report

As the Utility Bills are stored when they are printed or emailed, you can retrieve the stored notice to re-send to the resident.

1. From the 'Utility' Group search or select ***Stored Report***.
2. Or from Utility Billing via 'GoTo' / 'Print Stored Bills'.
3. Maximise the screen if required.
4. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Electricity Bill DD/MM/YY or email column).
5. This will then display only Electricity Bills for the filtered account.
6. Tag (click in the tag column field) to select the individual Utility Bills.
7. Once the Bill has displayed to screen, you may then either Print or Email.

Financial Statements

At each month end rollover, the Financial Statements will be available for reproducing. This is the recommended action to obtain backdated financial's. If trying to achieve the same result from Financial Statements, with the 'Report Period' the result may not be as effective as reviewing the Stored Report, due to the Balance Sheet consisting of current posting accounts that do not backdate.

1. Search or select ***Stored Report.***
2. Maximise the screen if required.
3. All stored reports will be displayed. Filter to locate the stored report as desired (i.e. sort by 'Account' / 'Name' / 'Lot' / 'Unit' / 'Entry Date' / 'Report Name' - Financial Statements').
4. This will then display only the selected detail for filtered account.
5. Tag (click in the tag column field) to select the individual Financial Statements.

> To adjust the format of the stored monthly Financial Statements, select the Report Name in***Financial Statements*** and under Options click *Save Settings for StrataMax*.