Stored Report

Last Modified on 19/08/2025 1:33 pm AEST



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.
- 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.

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File	Help Op	tions										
Report	File 2002	20001 ABB								Proceed		
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Report Name Levy Arrears Notice										Printer Setup		
neput nalite Levy Arteals house												
Report	Notes									Preview		
Print Full Report										Close		
	nd Emails Only	/ Show Deposi	it Slin Back	mund								
Ser	nd Emails Whe	ere Present Si	ngle Print	jioana								
					Tag Sel	ect Entry for Report - total o	f 62					
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	FRYG	7	7	11/11/19	Levy Notice	19315002.NOT					
			0.4	21	22/11/10	Law America Martin	19326001 ARR					
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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.
- 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.

Prin	nt Stored Rep	ort STRAT/	AMAX ONLINE	HELP H	KEEP 30	0621 20 Decem	ber 2022				\times	
File	Help Opt	tions										
Report File ME300422.FIN										Proceed		
Report	_	Printer Setup										
		Preview										
Report		Close										
	nd Emails Only		how Deposit Sli	n Backo	round							
Ser	nd Emails Whe	re Present	Single	Print								
			Т	ag Selec	t Entry f	or Report - total o	of 10					
Tag	Account	Name	0	l at	Heit	Entry Data	Donort Nomo	1	Repo	rt Group	No	
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						ОК	Cancel	TEM	ME30	1121.FIN	Mo	
					-				ME31	1221.FIN	Mo	
						31/01/22	FINANCIAL ST	ATEM	ME310	J122.FIN	Mo	
						28/02/22	FINANCIAL ST	ATEM	ME28	J222.FIN	Mo	
						31/03/22	FINANCIAL ST		ME31	J322.FIN	MO	
						30/04/22	FINANCIAL ST	ATEM	MESU	J422.FIN	INIC	
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10	of 10							Show /	All	Filter		

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.
- 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.
- 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 resend 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.
- 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*.