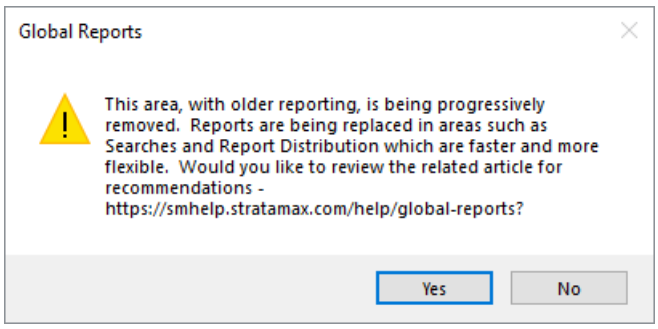
Reports / Utilities (Global) | Global Reports

Last Modified on 09/11/2026 11:56 am AEST



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

This old reporting area is progressively being removed and replaced with other reports, searches, icons. If the report / item is missing, please review below, for alternative options. Where there is no alternative suggested report, this indicates that these will remain in this menu until they are replaced.



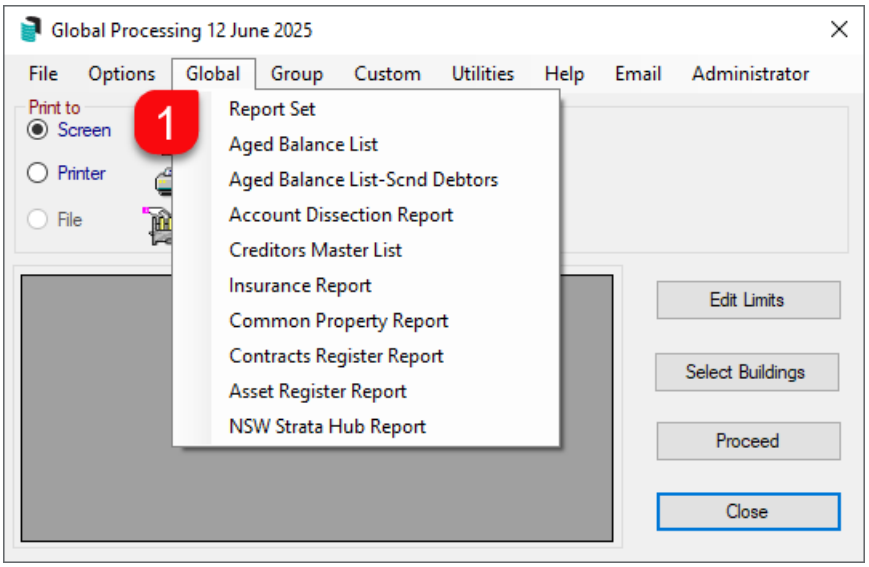
Search screens are available in most areas and replace most of the global reports, and also allow for an Excel report to be produced. Examples include ***Search Roll***, ***Search Office Bearers***, ***Search Bank Accounts***, ***Search Creditors***, ***Search Creditor Invoice Items***, and ***Search BAS***. These searches allow custom fields to be applied to report specific information around these valuable areas. To see the possibilities of these searches, select the StrataMax Logo icon in the top left of StrataMax, then type the keyword *Search* to see what is available. Report Distribution is the other area that can assist with PDF-style reporting. ***Reports/ Utilities Global*** is being slowly phased out and the remaining reports are available with the instructions below if required.

Global Reports

Throughout StrataMax (BCMax), there are options to print a single report for multiple buildings; the Global file menu allows for the production of consolidated reporting. If the output is set to screen, each of these will be selected with 'Yes' or 'No' to move on to the next building. If there are no results for reporting, there will be screen prompts at that report type to confirm there is no data to print. '*Do you want to print a 'Nil Item' report?'.*

Global Reports will produce a singular report for each building selected. This saves time in selecting the

report within each building and producing it.



Generate a Global Report

1. Search or select ***Reports / Utilities Global***.
2. Click *Global*, then select one of the available reports.
3. In Print to, Select: Screen / Printer / File (for Excel but may not be always available).
4. Click on *Select Buildings*.
5. Tag Buildings and click *OK.*
6. Click on *Edit Limits:* Double click in the field (or click the field and press Edit), some fields have a drop down to select or tag items, and others will require a date.
7. Click *OK* when finished.
8. Click *Proceed* to produce report.

Global Reports available

- Report Set
- Aged Balance List
- Aged Balance List – Second Debtor
- Account Dissection Report
- Creditors Master List - use ***Search Creditors*** or ***Creditors Master List*** (icon) or ***Creditors Info List*** (icon)
- Insurance Report
- Common Property Report
- Contracts Register Report - use ***Search Contracts***.
- Asset Register Report
- NSW Strata Hub Report

Group Reports

Group reports will print one consolidated report of the information for the buildings tagged. These reports may be produced while other users are accessing buildings. If the building is locked, there will be a prompt to confirm what action is to be taken. After printing each report, check the log for this report to see if any buildings were skipped.

Generate a Group Report

Group Reports may be produced to Screen, to Printer or to Excel upon completion.

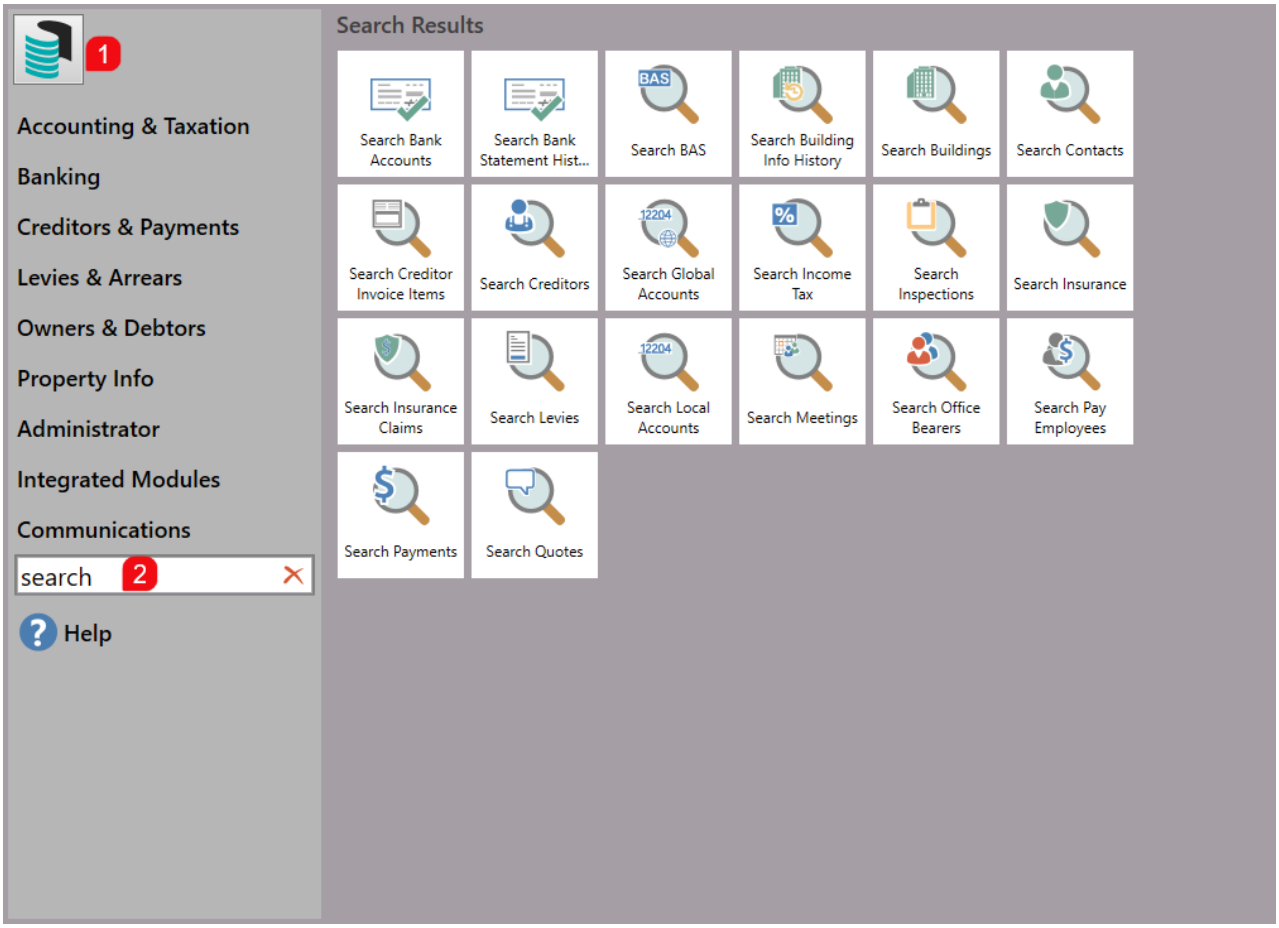
1. Search or select ***Reports / Utilities (Global)***.
2. Click *Group* to open the *Groups Reports* window.
3. Select the required report and click *OK*.
4. Select the required output method: *Screen*, *Printer*, or *File* (for Excel).
5. Click *Select Buildings* to open the *Building List* window.
6. Tag the required buildings (*Ctrl + A* to tag all) and click *OK*.
7. Click *Edit Limits*.
8. Double click in the field (or click the field and press Edit), some fields have a drop down to select or tag items, and others will require a date.
9. Click *OK* when finished.
10. Click *Proceed* to produce report.

Group Reports available

- Amounts per Lot Report - historical report, not being replaced.
- Arrears Notice Report - will be reviewed as part of the Levy / Budget / Arrears re-write.
- Cash Flow Management - use ***Report Distribution*** (reports an individual building report, not global yet).
- Contracts Details Report - will be considered with upcoming Register project.
- Contracts Expiry Report - will be considered with upcoming Register project.
- Creditors + Bank Balances Report - use Search Creditor Invoice Items or Search Creditors (no cash balance yet).
- Levy Generation Schedule - ***Levy Management*** / *Reports* screen - *Levy Generation Schedule*.
- Managers Reports - use ***Management Fees Report***, ***Search Meetings***, ***Search Buildings***.
- Master Building Report - use ***Search Buildings*** (Levy Year fields not currently available).
- Month End Status Report.
- Notes (includes ***Building Information***, ***Roll***, ***Arrears***, ***Certificates*** and ***Creditor Maintenance*** areas).
- Owner Balances Report - use ***Search Local or Global Debtors***.

- Owner Balances Report - Aged.
- Roll Changes Report.
- Total Levies for Year.

Search screens are available in most areas, and replace custom queries which both areas allow for an excel report. Examples include ***Search Roll***, ***Search Office Bearers***, ***Search Bank Accounts***, ***Search Creditors***, ***Search Creditor Invoice Items***, and ***Search BAS***. These searches allow custom fields to be applied to report specific information around these valuable areas. To see the possibilities of these searches, use the StrataMax teal icon in the top left and type the keyword *Search* to see what is available.

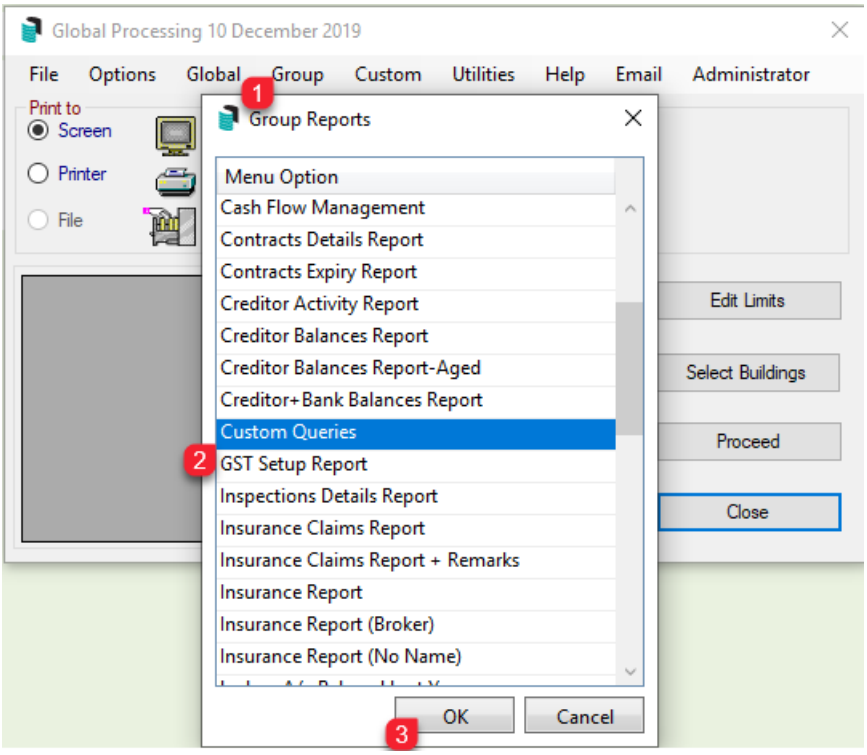


Custom Queries (Group)

Custom queries are an additional set of reports that open in Excel, there is no requirement to set 'Print to' options.

Generating a Custom Query Report

1. Search or select ***Reports / Utilities Global***.
2. Click *Group* to open the *Groups Reports* window.
3. Select *Custom Queries* (scroll down the list a little bit), then click *OK*.

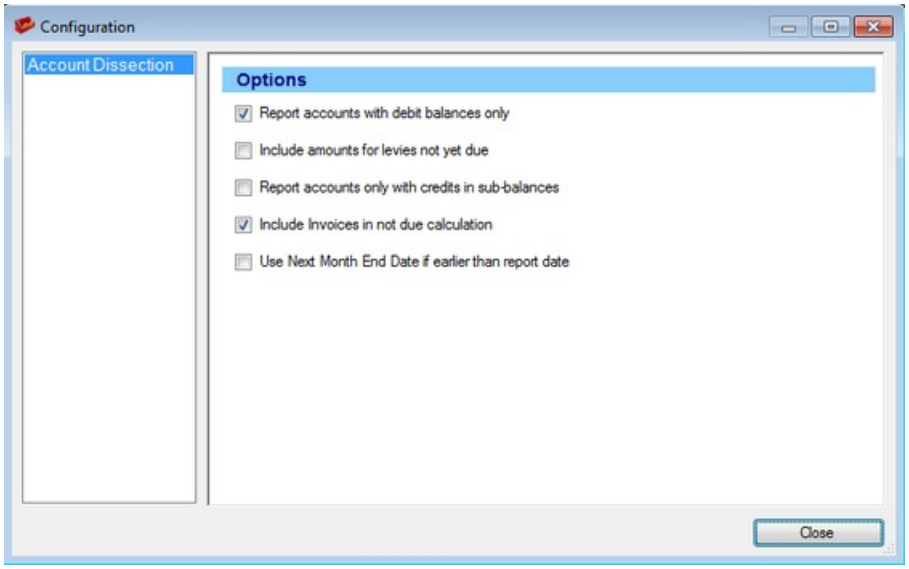


4. Click the *Select Buildings* button on the right, then in *Building List* tag the required building/s and click *OK*.
5. Click the *Proceed* button on the right, and the *Custom Queries* list will appear.
6. Select the Custom Query report required and click *OK.*
7. Please refer to the instructions below for specific details on each report available.

Arrears Worksheet / Arrears Worksheet Summarised Other

This query will provide a consolidated Account Dissection report based on the report settings selected in the *Options* screen. The 'Arrears Worksheet' will include the balances for each *Invoice Field* (additional funds) instead of consolidating to 'Other'.

The following configuration options will now display, tick the required options and click *Close.*



Example of Arrears Worksheet / Arrears Worksheet Summarised Other:

Body Corp No	Body Corporate Name	Account Manager	Code	Lot Number	Unit Number	Admin Fund Balance	Special Admin Fund	Sinking Fund	Special Sinking	Overdue Interest	Other Balance	Year to Date Bal.	Legal Action	Report Date
70161	TRAINING EXAMPLE 1	Training	02100001			302.41	0.00	625.00	0.00	0.00	0.00	927.41	No	14/07/2011
70161	TRAINING EXAMPLE 1	Training	02100002			7057.24	0.00	1875.00	0.00	0.00	0.00	8932.24	No	14/07/2011
70161	TRAINING EXAMPLE 1	Training	02100003			5504.83	0.00	1250.00	0.00	0.00	0.00	6754.83	No	14/07/2011
70161	TRAINING EXAMPLE 1	Training	02100004			3904.83	0.00	1250.00	0.00	0.00	0.00	5154.83	No	14/07/2011
70161	TRAINING EXAMPLE 1	Training	02100005			3704.83	0.00	1250.00	0.00	0.00	0.00	4954.83	No	14/07/2011
70162	TRAINING BUILDING	Training	02100001			1350.00	0.00	225.00	0.00	0.00	0.00	1590.00	No	14/07/2011
70162	TRAINING BUILDING	Training	02100002			3600.00	150.00	675.00	0.00	0.00	0.00	4425.00	No	14/07/2011
70162	TRAINING BUILDING	Training	02100003			2400.00	100.00	450.00	0.00	0.00	0.00	2950.00	No	14/07/2011
70162	TRAINING BUILDING	Training	02100004			2400.00	100.00	450.00	0.00	0.00	0.00	2950.00	No	14/07/2011
70162	TRAINING BUILDING	Training	02100005			1590.00	100.00	450.00	0.00	0.00	0.00	2140.00	No	14/07/2011
1234	TRAINING	Training	02100001			929.03	0.00	385.23	0.00	0.00	0.00	1314.26	Yes	14/07/2011
1234	TRAINING	Training	02100002			365.87	0.00	192.62	0.00	0.00	0.00	558.49	Yes	14/07/2011
1234	TRAINING	Training	02100003			931.75	0.00	385.23	0.00	0.00	15.00	1331.98	No	14/07/2011
1234	TRAINING	Training	02100004			817.29	0.00	385.23	0.00	0.00	0.00	1202.52	No	14/07/2011
40000	TRAINING DEMO	Veanne	02100002			40.00	0.00	0.00	0.00	0.00	0.00	40.00	No	14/07/2011
40000	TRAINING DEMO	Veanne	02100003			40.00	0.00	0.00	0.00	0.00	0.00	40.00	No	14/07/2011
40000	TRAINING DEMO	Veanne	02100004			40.00	0.00	0.00	0.00	0.00	0.00	40.00	No	14/07/2011
40000	TRAINING DEMO	Veanne	02100005			40.00	0.00	0.00	0.00	0.00	0.00	40.00	No	14/07/2011

GLMax Debtor Compare

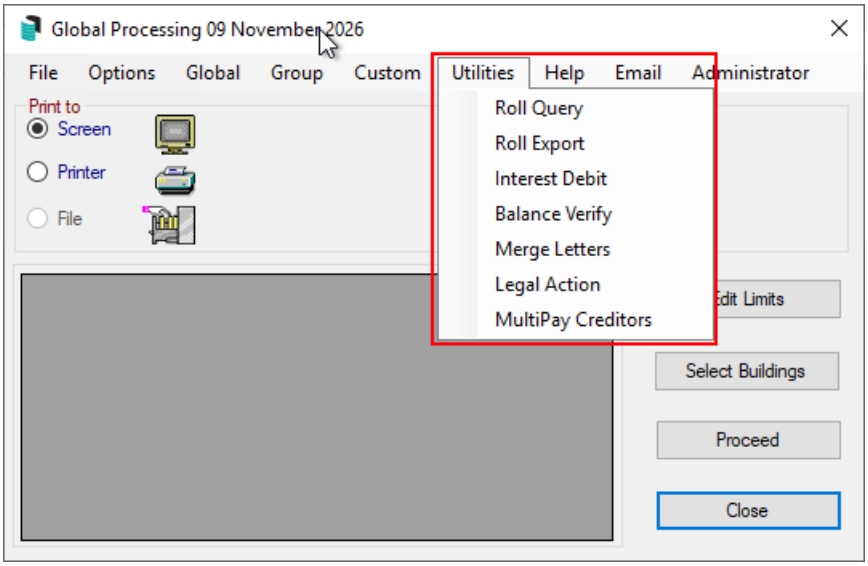
This report will compare the balance of the GLMax Body Corporate Management Debtors to the BCMax Creditor record balance. This report will only be 100% effective if the GLMax Company reconciles the Debtor receipts via the GLMax Bank Account; it will however, provide a quick report to determine the amount unpaid to the GLMax Company from the BCMax Buildings.

This report does not require any specific settings.

1. Select GLMax Debtor Compare.
2. Select the appropriate company if there is more than one management company set in GLMax.

Utilities

The reports / items below are expected to be removed in an upcoming version - please email training@stratamax.com if you have any queries related to the below.



- Roll Query - use ***Search Roll***.
- Roll Export - use ***Search Roll***
- Interest Debit - historical function.
- Balance Verify - historical function.
- Merge Letters - use Merge Letters.
- Legal Action - use ***Legal Action*** icon.
- Multipay Creditors - historical function.

Legal Action

Legal Action - accessible with the current icon which may be added to the Desktop. This area is also due to be enhanced as part of the Levy / Budget / Arrears rewrite.



Legacy Reports replaced with Searches

- Bank Details for all selected banks - use ***Search Bank Accounts***.
- Committee Extract - use ***Search Office Bearers***.
- Creditor Maintenance - use ***Search Creditors***.
- Creditor Payments Volume - use ***Search Creditor Invoice Items***.
- General Ledger Transactions - use ***Global Transactions*** for all buildings or ***Local Transactions*** for one building.
- Insurance Claims Report - use ***Search Insurance Claims***.
- Insurance Extract - use ***Search Insurance***.
- Levy Records with Paid Dates - use ***Search Levies***.
- Month End Dates - use ***Dashboard*** *Buildings Not Rolled.*

- New Development (NSW) Initial Period - use ***Search Buildings***.
- Overdraft Report - use ***Search Bank Accounts*** or Bank Balances report (from Report Distribution).
- Owner Extract - use ***Search Roll***.

Email

This will be removed in an upcoming version. The Get Email Addresses and View Email List are currently accessible in the related searches (Owners / Roll, Creditors / Committee - Office Bearers) for which these email lists were able to be produced.

Options / Custom

The options menu historically allowed the user to create a custom report by selecting fields to add / remove and create a unique report. This option is no longer able to be used due to the many enhancements on the way that data is now stored. The Custom menu may still allow access to these old created reports, which may not always report.

Please use one of the many searches now available as the alternative, and use the Save Search option to reuse for the future. If you find that you are unable to setup and report as required, please email training@stratamax.com to provide details and context.