# Notes

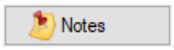
Last Modified on 19/11/2026 4:47 pm AEST

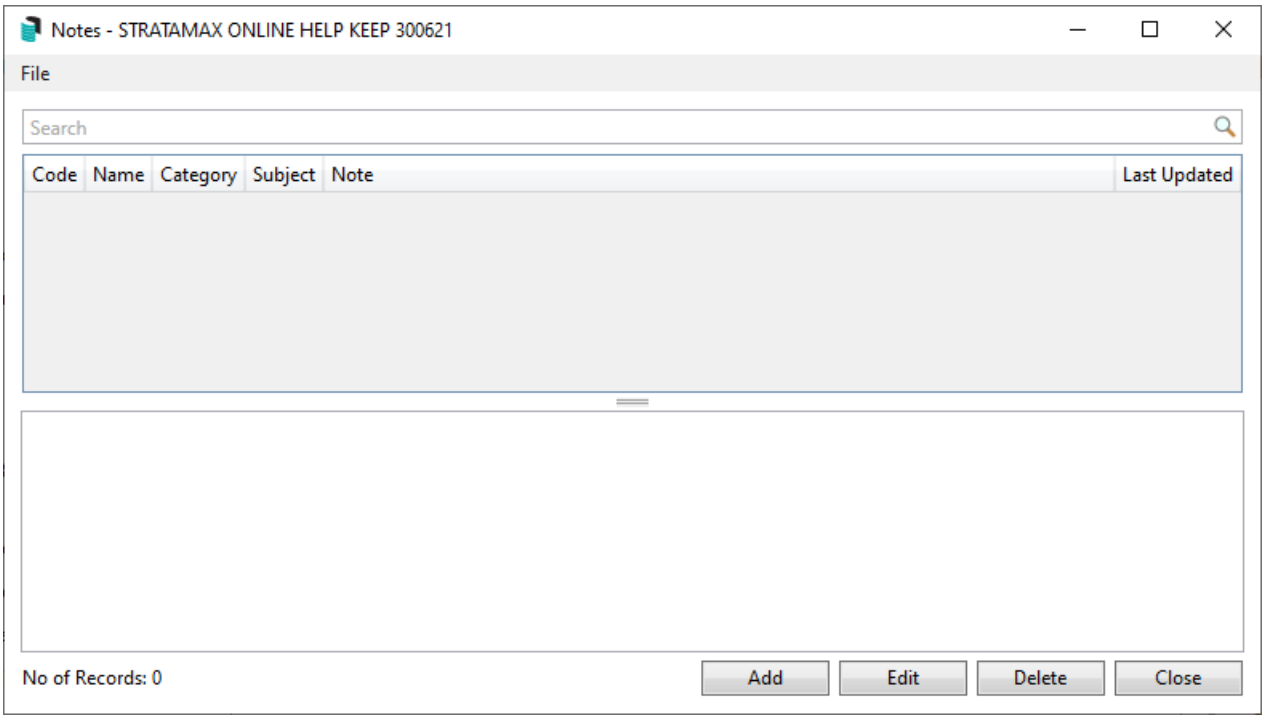
This article covers ***Notes*** in StrataMax, which can be opened by clicking the Notes option in a number of menus or by using the Search field on the StrataMax desktop. By default this will open the ***Building Information*** menu with the *Notes* tab already selected. Notes is designed to store text information only; storing content that includes images should be done in DocMax.

There are multiple areas or menus in StrataMax where notes can be added. Although the information is different for each area, the functionality of the Notes menu is the same across the StrataMax. Here are a few of the main areas where notes are available:

1. ***Building Information***
2. ***Creditor Maintenance***
3. ***Roll***
4. ***Office Bearers***

When a Note has been entered in a particular area, the*Notes* box will include an icon.




# Configure Notes View

1. Search or select ***Building Information.***

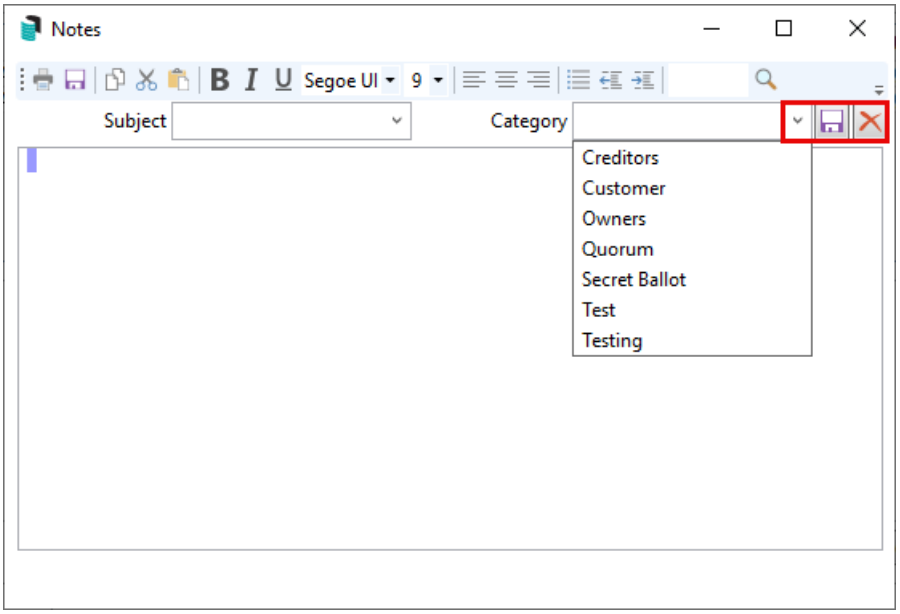
2. Click *Notes.*
3. Select File and choose from the following:
    - Show All Notes - tick to display all notes (this include all buildings).
    - Display Newest at Top.

## Configuring Subjects and Categories

The Subject list is made up of all prior Subjects used when a Note is entered. Categories can be saved so they are available from the drop down arrow & may also be deleted if required.

1. Search or select ***Building Information*** (or area that notes are stored).
2. Click *Notes*.
3. Click *Add* to setup categories.
4. Key into the Category field the desired description.
5. Click the *Save* button.

    - To remove a Category select the name and click the X delete button. If the Category has been used in your Notes you will not be able to delete the Category.
6. Close the Note; this can be done without saving a new Note if required.



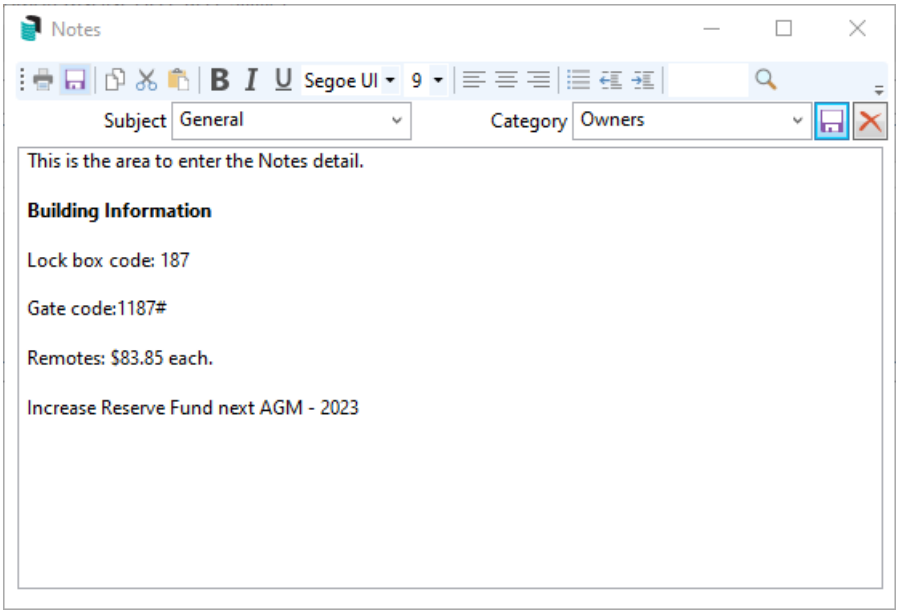

## Adding Notes to StrataMax

Adding a note to any of the areas that a Note can be recorded within is the same as adding a note in the Roll.

1. Search or select ***Building Information*** or click on *Notes* from relevant area such as ***Roll*** / ***Creditor***

***Maintenance*** etc).

2. Click *Add.*
3. Select from the *Subject* and the *Category* or create as required.
4. Add your notes to the notepad area of the screen, or copy and paste from the source of information.
5. Click *Save* or if you click on the X top right it will ask you if you want to save the note
6. *Close.*




# Edit Notes

Notes can be Edited if required; security permissions may restrict some users ability to do this.

1. Click on *Notes* from relevant area.
2. Select the Note.
3. Click on *Edit* .
4. Make changes to the Note and click on *Save* icon or close Note and select *Yes* to message.
5. *Close*.

# Delete Notes

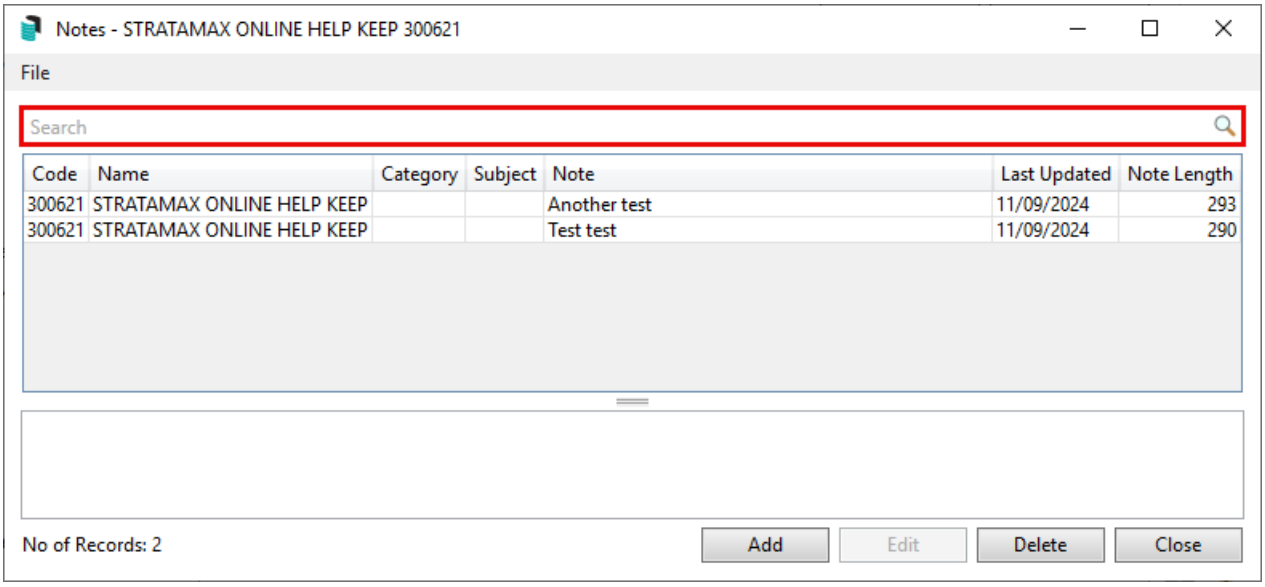
Notes can be Deleted if required; security permissions may restrict some users ability to do this.

1. Click on *Notes* from relevant area.
2. Select the Note.
3. Click on Delete and answer Yes when asked 'Are you Sure'?

# Search Notes

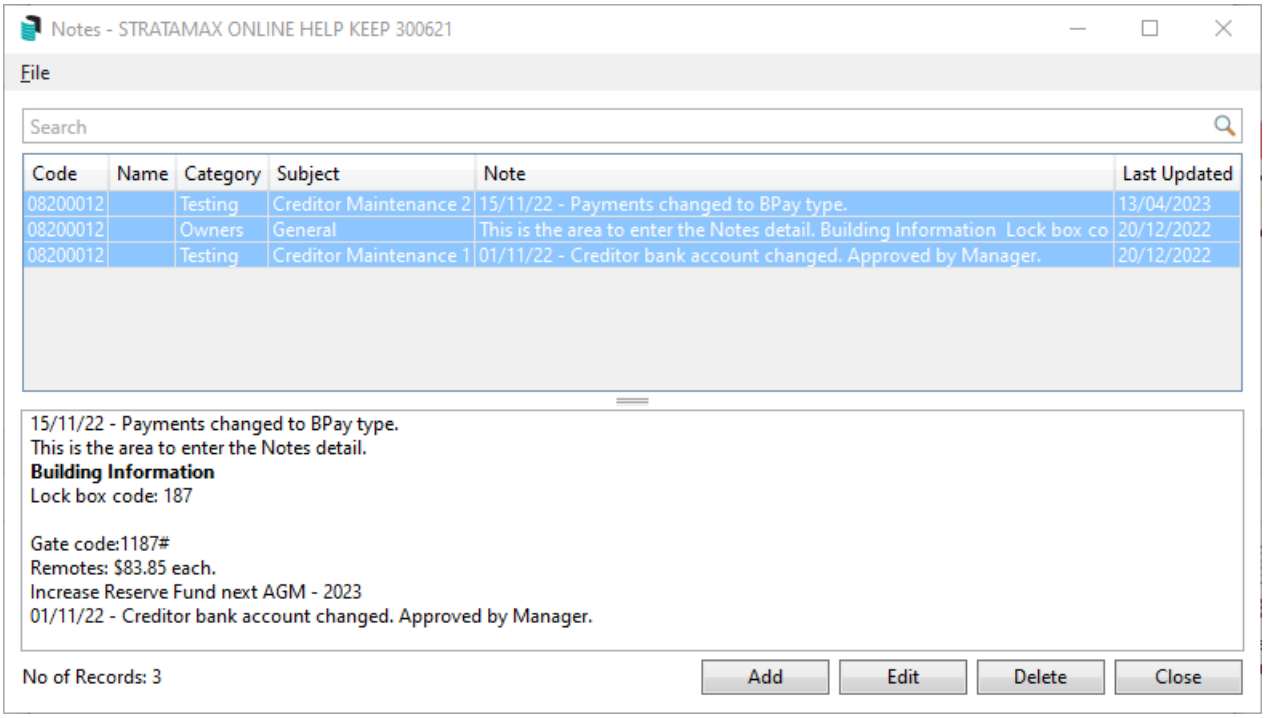
Notes can be searched based on the specific area you open Notes from. In the example below, clicking on Search will allow a search of all Notes entered into the Roll for Account Code 02100001.

1. Click on *Notes* from any area.
2. Click on search field and start typing detail to locate - the list will return data with the information typed.




# View Multiple Notes

Multiple notes can be displayed in the preview screen by holding the Shift or Ctrl key and selecting multiple notes.




# Quick Print Notes

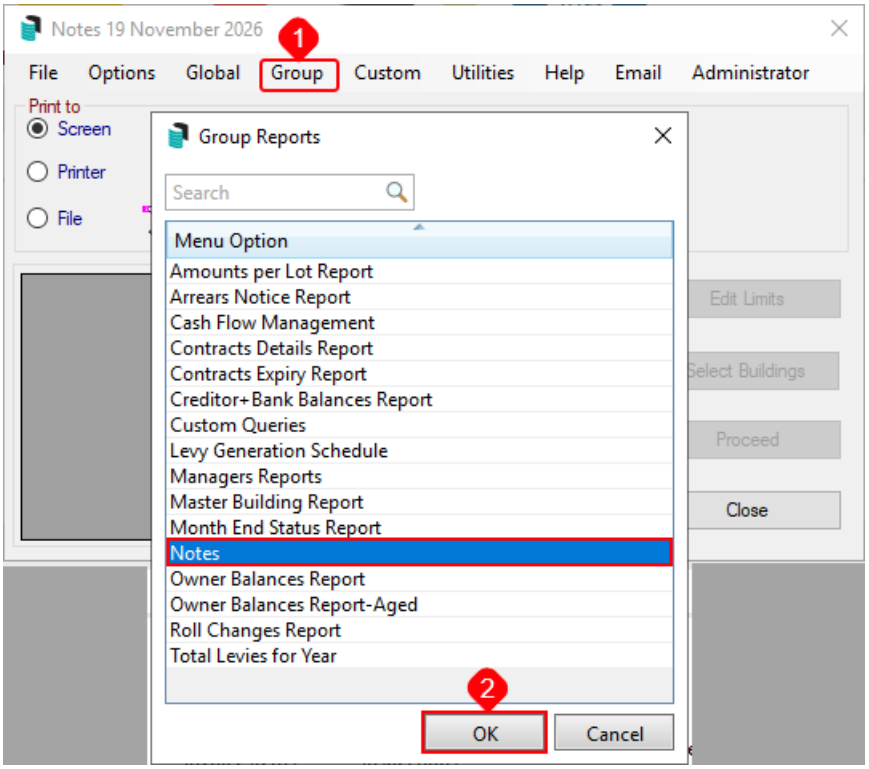
These instructions apply for printing the local building notes. There is an option to also do this globally via Reports / Utilities Global / Group Report.

1. Search or select ***Quick Lists.***
2. From the list of data, click *Notes.*
3. If required, click *Old Year* to include old year.
4. To apply filters, click in the column for preferred filtering and right click*Filter By: X*. To undo this action, right click and *Clear Filter.*
5. Click *Report* to output the information to Excel.

Additional columns can be displayed by selecting*File* | *Set Display Fields*.

# Global Notes

Notes can be reported for all or multiple buildings using***Reports/Utilities (Global)*** in the *Global* menu. The notes will report to Excel where the data can be sorted & filtered as needed. Highlight all line items to report (Shift to highlight all) before clicking *Print*.


Notes 19 November 2026
1
File
Options
Global
Group
Custom
Utilities
Help
Email
Administrator
Print to
Screen
Printer
File
Edit Limits
Select Buildings
Proceed
Close
Group Reports
Search
Menu Option
Amounts per Lot Report
Arrears Notice Report
Cash Flow Management
Contracts Details Report
Contracts Expiry Report
Creditor+Bank Balances Report
Custom Queries
Levy Generation Schedule
Managers Reports
Master Building Report
Month End Status Report
Notes
Owner Balances Report
Owner Balances Report-Aged
Roll Changes Report
Total Levies for Year
2
OK
Cancel