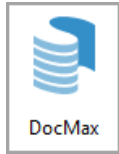


DocMax | Advanced Search and Saved Searches

Last Modified on 16/06/2026 10:32 am AEST



This article explains how to use *Advanced Search* in **DocMax** to find documents using multiple filters. It also explains how to save searches and how to create, edit and delete *Saved Searches* in the *Administration* tab.

The **DocMax** icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

We also offer a completely free **DocMax Basics** online course, which you can enrol in [here](#). Please see the [StrataMax Online Courses](#) page for more details, including the coupon code required to enrol for free.

Advanced Searches

Advanced Search provides a more detailed way to locate documents in **DocMax**. If the standard search options do not return the documents you need, *Advanced Search* allows you to search using multiple filters such as building, category, title, creditor and date.

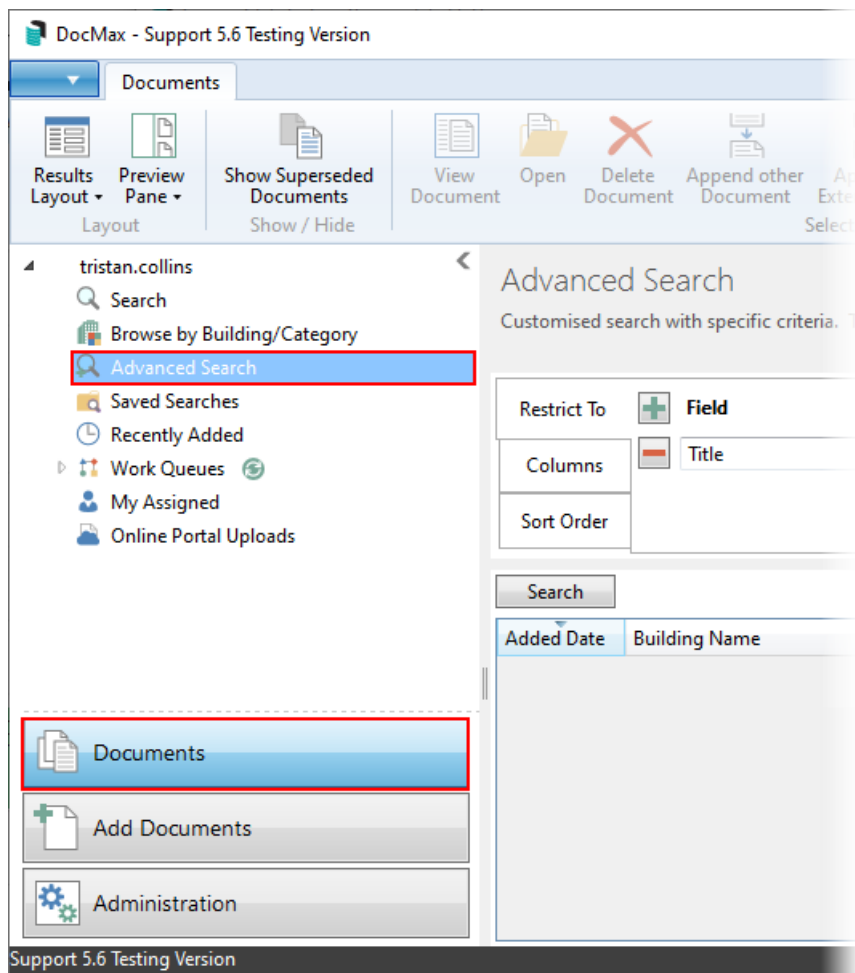
Advanced Search results are limited to the first 1000 documents displayed on screen. You can also configure the *Columns* and *Sort Order* to control how the results are shown.

An *Advanced Search* can also be saved as a *Saved Search* for later use.

Create an Advanced Search

Use the steps below to create an advanced search in **DocMax**.

1. Search for or select **DocMax**.
2. Select the *Documents* tab.
3. Select *Advanced Search* from the menu on the left.



Restrict To

The *Restrict To* tab is used to add the criteria for the search. Each restriction has three parts:

- **Field** – the type of information to search by
- **Condition** – how the field should be matched
- **Value** – the search value, where applicable

Use the  button to add a restriction and the  button to remove one.

Common fields include *Building Name*, *Building Number*, *Categories* and *Title*. If the *Creditor* field is used with the condition *is any of*, multiple creditors can be selected.

The *Condition* and *Value* options will change depending on the field selected. For example, if you choose *Added Date*, the available conditions will change to date-based options. If the condition is *is in the range*, the value area will display date options. If the condition is *is in the last 7 days*, no value is required.

Once all restrictions have been added, click *Search* to test the results.

Common Restrict To fields

The following is a common example of a general document search:

- **Field:** Building Name

- **Condition:** is any of
- **Value:** select the required building
- **Field:** Categories
- **Condition:** is any of
- **Value:** select the required category
- **Field:** Title
- **Condition:** contains
- **Value:** enter a keyword if required

Restrict To	+	Field	Condition	Value
Columns	-	Building Name	is any of	
Sort Order	-	Title	contains	
	-	Added Date	is in the range	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>
	-	Categories	is any of	
	-	Extracted Text	contains	

Other Restrict To fields that can assist searches and work queues

The following *Restrict To* fields can help refine DocMax searches and work queues. These fields can be used to identify invoice-related documents, filter by file type or size, and distinguish between the document date and the date the document was added.

- *Invoice Manual Entry* – Use the **condition** *is equal to* and select *Yes* or *No*.
- *Creditor Invoice* – Use the **condition** *is equal to* and select *Yes* or *No*.
- *Scheduled Creditor Invoice* – Use the **condition** *is equal to* and select *Yes* or *No*.
- *Data Size* – Use this field to filter documents by file size. Enter the required value, and where available, select the appropriate **condition**, such as *is equal to*, *greater than* or *less than*.
- *File Format* – Use the **condition** *is equal to* or *is not equal to* and select the required value, such as *StrataMax Stored Report*.
- *Document Date* – Use this field when the date of the document is different from the *Added Date*. *Document Date* is recorded separately and can be used to search by the actual document date rather than the date the document was added.

Columns

After the required restrictions have been added, use the *Columns* tab to choose which columns are displayed and the order they appear in the search results.

- Add columns by selecting a field in *Available Columns* and clicking *Add >*.
- Remove columns by selecting a field in *Displayed Columns* and clicking *< Remove*.
- Change the column order by selecting a field in *Displayed Columns* and using the up or down

arrows.

Advanced Search
Customised search with specific criteria. The results can be displayed in your preferred layout.

Restrict To: Available Columns

Columns: Account Group, Action Date, Actioned Date, Added By, Added From, Applies To, Building Is Lost

Sort Order: [Empty]

Displayed Columns: Added Date, Building Name, Building Number, Title, Description, Assigned To, Status, Creditor Name

Buttons: Add >, < Remove

Sort Order

Use the *Sort Order* tab to control how the results are sorted. By default, the results are sorted by *Added Date*, but additional sort fields can be added if required.

Restrict To: Available Columns

Columns: Owner Name, Remove From Portal After Date, Should Upload For Invoice Hub, Should Upload For Meeting Hub

Sort Order: [Empty]

Sorted Columns: Added Date (Newest First), Building Number (A to Z), Title (A to Z)

Buttons: Add >, < Remove, Up Arrow, Down Arrow

Search: 20 records displayed

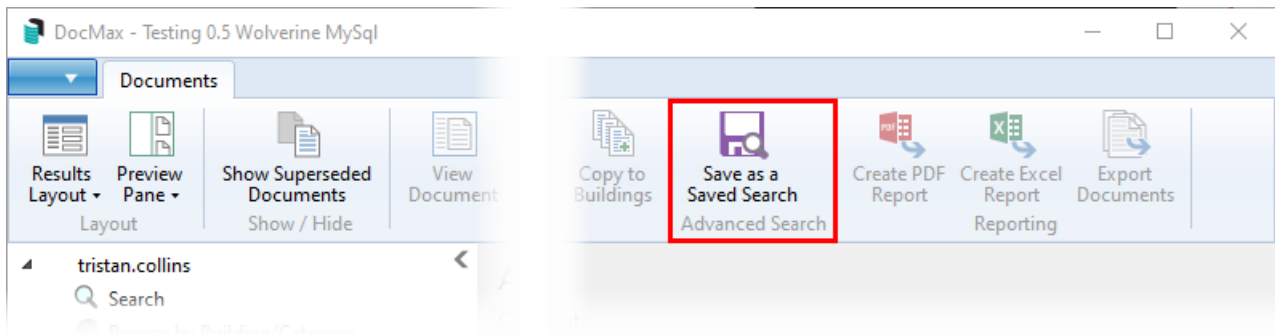
Added Date	Building Name	Building Number	Title
14/05/2021	JAS TEST	1J	Recoveries Invoice
05/05/2021	1 FREESTONE DRIVE KEEP	38378S	123
05/05/2021			Test 5
05/05/2021			Test 5
05/05/2021			Test 5

- Add sort fields by selecting a field in *Available Columns* and clicking *Add >*.
- Remove sort fields by selecting a field in *Sorted Columns* and clicking *< Remove*.
- Change the sort sequence by selecting a field in *Sorted Columns* and using the up or down arrows.
- Change the sort direction by clicking the button next to the field.
- You can also click a column heading in the results grid to change the sort order.

For performance reasons, the following fields cannot be used to sort the search results:

- Added From
- Applies To
- Categories
- Custom Properties
- Insurance Claim
- Insurance Policy
- Is Uploaded to Online Portal
- Portal Upload Status
- Search Words
- Transaction Reference

Once the advanced search has been configured, you can save it by clicking *Save as a Saved Search* in the DocMax ribbon.



Saved Searches

A *Saved Search* is an *Advanced Search* that has been stored for future use. Saved searches can also be assigned to specific users or groups through [Security Setup](#).

If a saved search is not visible to another user, it is usually because it has only been made available to a specific user or security group.

Saved searches can be created in two ways:

- Create an *Advanced Search* from the *Documents* tab, then click *Save as a Saved Search*
- Create or edit a saved search directly from the [Administration](#) tab in the *Saved Searches* area.

Saved searches can include restrictions, selected columns and sort order. These settings should be reviewed carefully, as the search layout cannot be adjusted when the saved search is run. The first 1000 results are displayed on screen, but exports include all matching results.

When designing a search, consider whether *BCMax System* documents should be included or excluded.

General document search

This example shows how to create a general document search that can be used across the office.

Consider excluding *BCMax System* documents by adding the restriction *Added From is not equal to BCMax System*. This excludes documents such as arrears notices, levies and ledger cards created by BCMax System.

To create a general document saved search:

1. Select the *Administration* tab.
2. Select *Saved Searches* from the menu on the left.
3. Click *Add New*.

4. Enter a name for the search, such as *Document Search*.
5. Enter a description if required.
6. Set *Available To* to the *Users* group so the search is available to all internal users.
 - Do not use *Everyone*, as this could allow external users to see the search.
7. In the *Restrict To* tab, add the required fields using the green + button.
8. Select the required *Condition* for each field.
9. Leave the *Value* blank if you want the user to choose the value when running the search.
10. Repeat for any additional fields.
11. Select the *Columns* tab and review which columns should be displayed.
12. Select the *Sort Order* tab and apply the required sort order.
13. Save the search.

Name <input type="text" value="General Documents"/>				
Description <input type="text"/>				
Available To <input type="text" value="Users"/>				
Restrict To	<input type="button" value="+"/>	Field	Condition	Value
Columns	<input type="button" value="-"/>	Building Name	is any of	<input type="text"/>
Sort Order	<input type="button" value="-"/>	Title	contains	<input type="text"/>
	<input type="button" value="-"/>	Added Date	is in the range	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>
	<input type="button" value="-"/>	Categories	is any of	<input type="text"/>
	<input type="button" value="-"/>	Extracted Text	contains	<input type="text"/>

Invoice saved search

This example shows how to set up a saved search for invoice-related documents in **DocMax**.

Consider excluding *BCMax System* documents by adding the restriction *Added From is not equal to BCMax System*.

To create an invoice saved search:

1. Select *Advanced Search*.
2. Add a restriction using the required field, such as *Creditor*.
3. Select the required *Condition*. For example, *Creditor* with the condition *is equal to* will allow a creditor to be selected from the BCMax creditor list.
4. Leave the *Value* blank if you want the user to select the value when running the search.
5. Repeat for any additional restrictions.
6. Select the *Columns* tab and review which columns should be displayed.
7. Select the *Sort Order* tab and apply the required sort order.
8. Click *Save as a Saved Search*, then enter a name, description and the required *Available To* setting.

Name	Invoices		
Description	This search can be used to find invoices based off the Invoice Number, Amount & Creditor.		
Available To	Users		
Restrict To	Field	Condition	Value
Columns	Building Name	is any of	
Sort Order	Creditor	is equal to	
	Invoice Amount	is equal to	
	Invoice Date	is in the range	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>
	Invoice Number	contains	
	Is Building on Invoice Hub	is equal to	<input type="radio"/> Yes <input type="radio"/> No
	Categories	is any of	<input type="text"/> Invoices <input type="button" value="X"/>
	Extracted Text	contains	

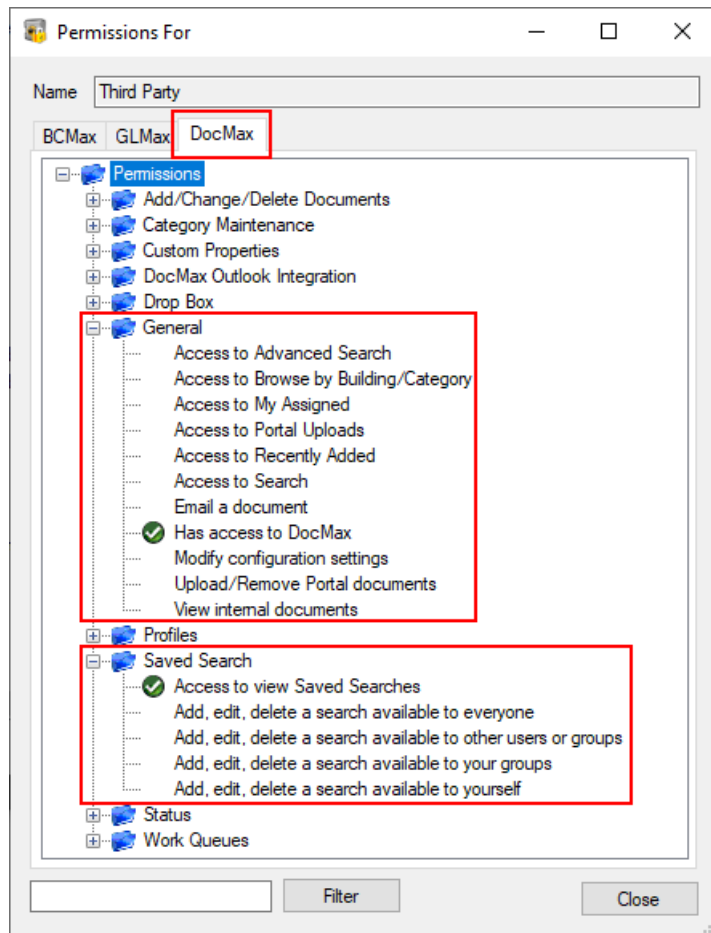
Stored report (BCMax System documents)

This example provides a framework for a saved search that works in a similar way to **Stored Reports**. It can be used to report on BCMax System documents stored in **DocMax**.

This saved search is intended for *BCMax System* documents only. Use the restriction *Added From is equal to BCMax System* to include system-generated documents such as arrears notices, levies and ledger cards. You can also use *File Format* to search for *StrataMax Stored Report*.

To create a stored report saved search:

1. Search for or select **DocMax**.
2. Select *Advanced Search*, or open the *Administration* tab and select *Saved Searches*.
3. Click *Add New* if creating the search from *Saved Searches*.
4. Add the required restrictions, such as *Added From is equal to BCMax System* or *File Format is equal to StrataMax Stored Report*.
5. Add any additional restrictions needed to make the search easier to use.
6. Select the *Columns* tab and review which columns should be displayed.
7. Select the *Sort Order* tab and apply the required sort order.
8. Save the search and assign the correct *Available To* setting.



This gives limited access to documents based on selected fields such as category, title or date. If access is required for a specific building, that restriction should also be included in the saved search.

To create a saved search for third-party or external users:

1. Select the *Administration* tab.
2. Select *Saved Searches* from the menu on the left.
3. Click *Add New*.
4. Enter a name for the search.
5. Enter a description if required.
6. Set *Available To* to the security group created for the external users.

Restrict To	Condition	Value
Building Name	is equal to	Select a specific building from your portfolio, or leave blank if the user should be able to select any building
Title	contains	Blank – entered when the search is run
Categories	is any of	Blank – selected when the search is run
Description	contains	Blank – entered when the search is run
Extracted Text	contains	Blank – entered when the search is run

Restrict To	Condition	Value
Added Date	is in the range	Blank – selected when the search is run
Categories	is not any of	Category not included for third-party searching

7. Select the *Columns* tab and review which columns should be displayed.
8. Select the *Sort Order* tab and apply the required sort order.
9. Click *Save Changes*.

Test the saved search by logging in as the external user and confirming the results display as expected.