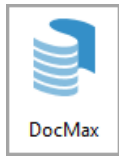


DocMax | Advanced Search and Saved Searches

Last Modified on 25/06/2026 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

Use *Advanced Searches* when the standard document lists do not show enough documents or when a different sort order is required. If the question is about accounting data, such as expense code, invoice item, payment status or creditor invoice amount, it is recommended to use the relevant Search screen in StrataMax first, such as [Search Creditor Invoice Items](#), [Payments Management](#), [Local Transactions](#) or [Interactive Reports](#). Use DocMax to open or review the document once the accounting record has been identified.

Advanced Search allows users to search using multiple filters such as building, category, title, creditor and date. The results are limited to the first 1000 documents displayed on screen. *Columns* and *Sort Order* can also be configured to control how the results are shown.

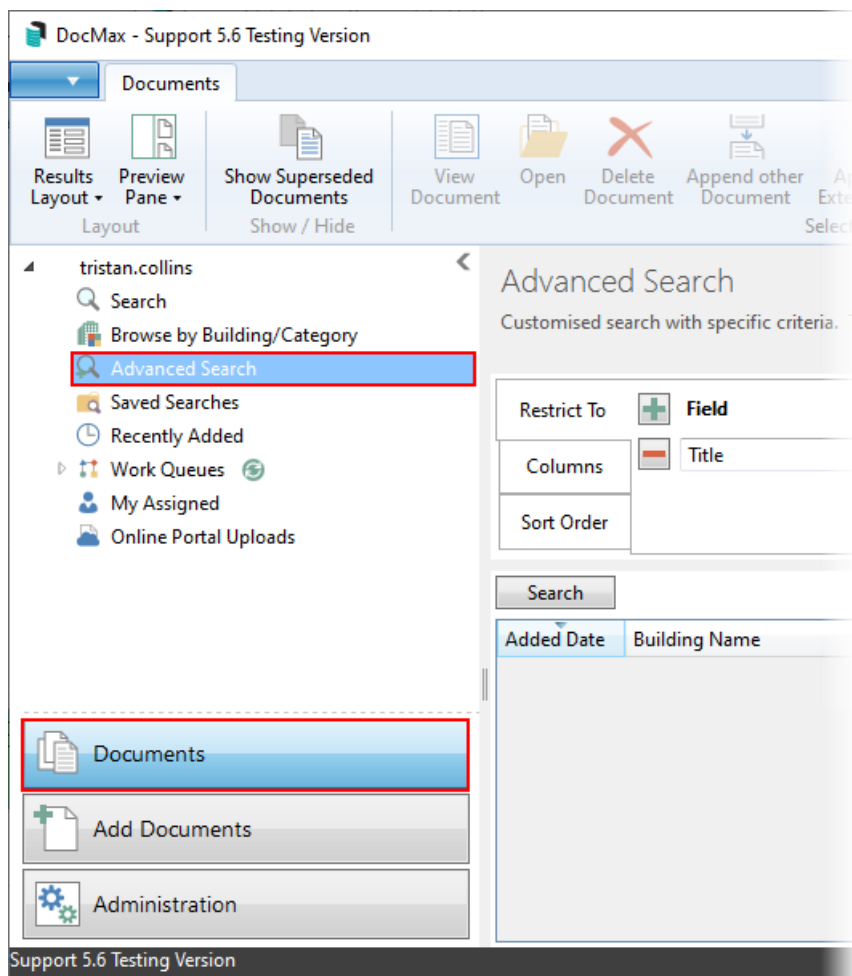
An *Advanced Search* can also be saved as a *Saved Search* for later use.

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

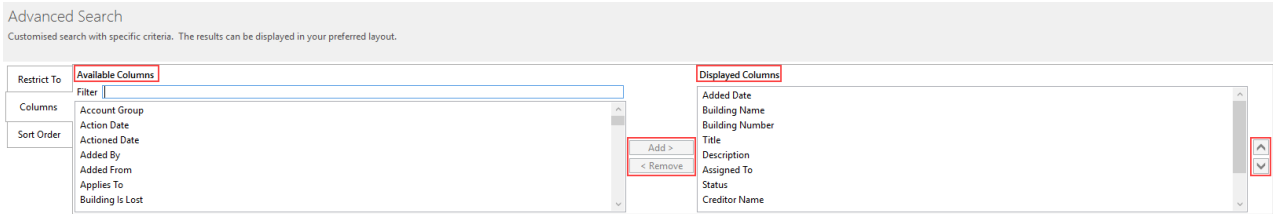
The following *Restrict To* fields can help refine DocMax searches and work queues. These fields can be used to identify invoice-related documents, filter by file type or size, and distinguish between the document date and the date the document was added.

- **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.



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.

Added Date	Building Name	Building Number	Title
14/05/2021	JAS TEST	1J	Recoveries Invoice
05/05/2021	1 FREESTONE DRIVE KEEP	383785	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

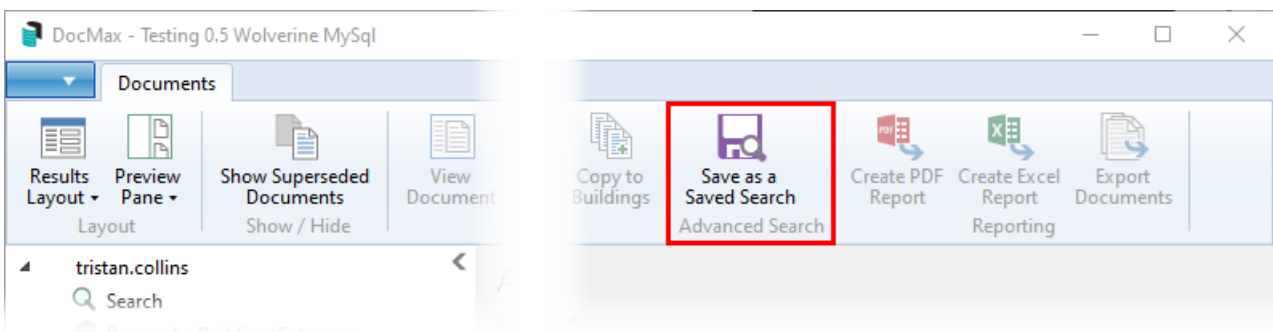
Saved Searches

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 the *Save as a Saved Search* button in the DocMax ribbon.
- 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="x"/>	<input type="text" value="Building Name"/>	<input type="text" value="is any of"/>	<input type="text"/>
Sort Order	<input type="button" value="x"/>	<input type="text" value="Title"/>	<input type="text" value="contains"/>	<input type="text"/>
	<input type="button" value="x"/>	<input type="text" value="Added Date"/>	<input type="text" value="is in the range"/>	<input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/>
	<input type="button" value="x"/>	<input type="text" value="Categories"/>	<input type="text" value="is any of"/>	<input type="text"/>
	<input type="button" value="x"/>	<input type="text" value="Extracted Text"/>	<input type="text" value="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.

Name: **Stored Reports**

Description: **This is a saved search using the same fields as Stored Reports**

Available To: **Everyone**

Restrict To	Field	Condition	Value
Columns	Building Name	is equal to	
Sort Order	Building Number	contains	
	Added From	is equal to	BCMax System
	Lot	contains	
	Lot Account Code	contains	
	Email Recipient	contains	
	Added Date	is on	<input type="checkbox"/> Specific Dates
	Title	starts with	

Review Results 605 records displayed

Added Date	Building Name	Building Number	Title	Description	Lot Account	Email Recipient
20/06/2023			Lana Letter	Lana Letter	02100001	support@stratamax.com.au
20/06/2023			Name and Address	Name and Address		test1@email.com;test2@email.com
20/06/2023			Name and Address	Name and Address		developer@email.com
20/06/2023			Name and Address	Name and Address		
20/06/2023			Name and Address	Name and Address		
20/06/2023			Name and Address	Name and Address		
20/06/2023			Keri	Keri	02100240	
20/06/2023			Levy Notice		02100240	
19/06/2023			ELECTRICITY ARREARS 19/0		02100038	
16/06/2023			ELECTRICITY ARREARS 16/0		02100172	
16/06/2023			ELECTRICITY ARREARS 16/0		02100095	
16/06/2023			ELECTRICITY ARREARS 16/0		02100054	
16/06/2023			ELECTRICITY ARREARS 16/0		02100038	
16/06/2023			ELECTRICITY ARREARS 16/0		02100201	
16/06/2023			ELECTRICITY ARREARS 16/0		02100180	
16/06/2023			ELECTRICITY ARREARS 16/0		02100178	
16/06/2023			ELECTRICITY ARREARS 16/0		02100168	
16/06/2023			ELECTRICITY ARREARS 16/0		02100145	
16/06/2023			ELECTRICITY ARREARS 16/0		02100130	
16/06/2023			ELECTRICITY ARREARS 16/0		02100124	
16/06/2023			ELECTRICITY ARREARS 16/0		02100115	

Documents

Results: **Layout** | Preview: **Layout** | Show Suspended Documents: **Show / Hide** | View Document | Open | Delete Document | Append other Document | Append External File | Disbursements | Print | Email | View History | Copy to Buildings | Save as a Saved Search | Create PDF Report | Create Excel Report | Export Documents

lana.clarke

Search

Browse by Building/Category

Advanced Search

Saved Searches

Recently Added

Work Queues

My Assigned

Online Portal Uploads

Advanced Search

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

Restrict To	Field	Condition	Value
Columns	File Format	is equal to	StrataMax Stored Report
Sort Order	Building Name	is equal to	STRATAMAX ONLINE HELP KEEP

Search 99 records displayed

Added Date	Building Name	Building Number	Title	Description	Assigned To	Status
09/01/2026	STRATAMAX ONLINE HELP	300621	Invoices			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
18/12/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
03/12/2025	STRATAMAX ONLINE HELP	300621	Invoices			
03/12/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
05/11/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
23/10/2025	STRATAMAX ONLINE HELP	300621	Levy Notice			
02/10/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
13/09/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
21/08/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			
21/08/2025	STRATAMAX ONLINE HELP	300621	FINANCIAL STATEMENTS			

STRATAMAX ONLINE HELP KEEP CTS 1521

Body Corporate and Community Management Act 1997

NOTICE OF CONTRIBUTIONS

Alison Smith & SMITH PETER
Belle Estate Agent
41113 Breakfast Creek Rd
NEWSTEAD QLD 4000

Date of Notice: 17 December 2025

Lot No: 1 | Unit Number: 1

Contra Bx: 10 | Financial Bx: 8

Account	Period	Due Date	Amount	Discount	F Paid By	Net Amount
Admin Fund Special	Testing Period	01/10/2024	\$1,000.00	\$0.00		\$1,000.00
General Fund	01/06/2024 to 31/03/2025	01/06/2024	\$100.00	\$0.00		\$100.00
Other - Due Immediately			\$15.00	\$0.00		\$15.00

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

Restrict To: Filter, File

Available Columns: File Format Id, Original File Name

Displayed Columns: Description, File Format, Assigned To, Status, Creditor Name, Invoice Amount, Invoice Number, Account Manager

Search 170 records displayed

Building Name	Building Number	Title	Description	File Format	Assigned To
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Arrears Notice	Levy Arrears Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Arrears Notice	Levy Arrears Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Arrears Notice	Levy Arrears Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Arrears Notice	Levy Arrears Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Arrears Notice	Levy Arrears Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	
STRATAMAX ONLINE HELP	300621	Levy Notice	Levy Notice	StrataMax Stored Report	

MaxSoft
Strata Plan No. 1521
1 Brook Avenue Weybridge GL0 4EJ
BALANCE SHEET
AS AT 31 MAY 2024

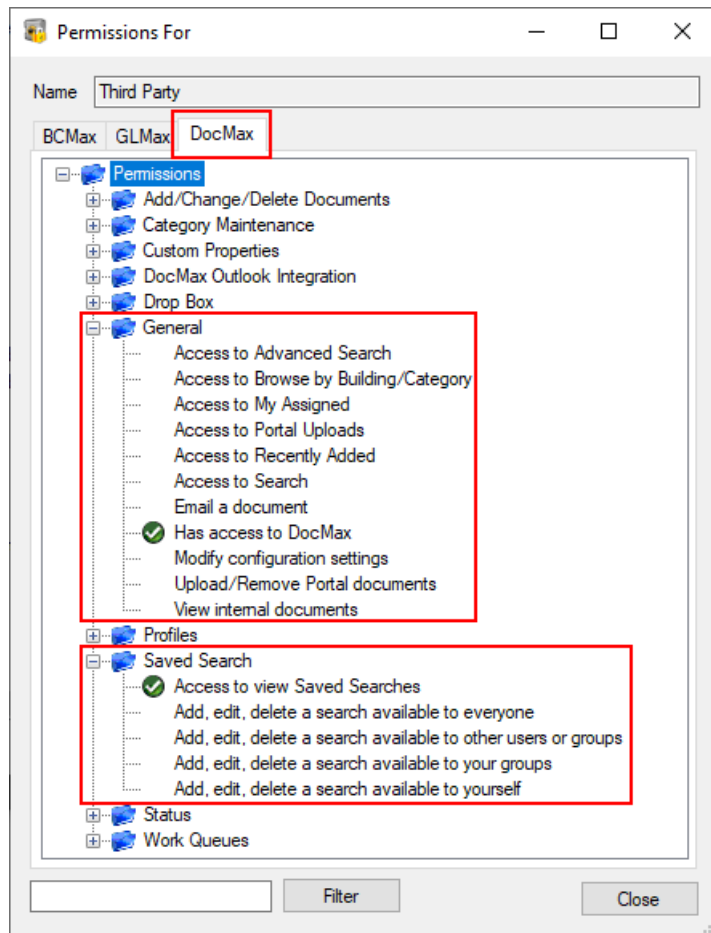
	ACTUAL	ACTUAL
31/05/2024	31/05/2023	
OWNER FUNDS		
Administrative Fund	5,594.00	12,400.04
Reserve Fund	52,000.00	24,200.00
TOTAL	57,594.00	36,600.04
THESE FUNDS ARE REPRESENTED BY:		
CURRENT ASSETS		
Bank Balance Admin Fund	6,600.00	6,000.00
Bank Balance Reserve Fund	52,000.00	24,200.00
Levy & Arrears	4,800.00	6,000.00
Other Arrears	900.00	0.00
Interest On Overdue Levies	294.00	100.04
Reserve Credits	100.00	0.00
TOTAL ASSETS	67,644.00	36,300.04
LIABILITIES		
Creditors	1,050.00	3,000.00
Levy & Arrears	1,944.00	0.00

Third Party/External Users saved search

This type of saved search can be used to give external users, such as auditors, access to specific document searches. It assumes the external user has already been set up in StrataMax and added to the appropriate security group in [Security Setup](#).

We also have the [Security Setup & External Parties Remote Access Video](#) which covers the Security Setup process.

Only the required DocMax permissions should be set to *Allow* for third-party users. All other DocMax permissions should remain as *Inherit*.



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.

Search Agent Report Set

Using *Report Set*, lot-specific reports can be produced and saved to DocMax for the search agent to access with the *DocMax* documents.

Report Distribution - BROOKFIELD PLACE 25785

Search Agent Report Simple [Settings] [Help]

Building: Accounts:

Report Set: Page Numbers Consolidate by Contact

Contents Page [repset] Report Set
 Ledger Card Period: YTD + Old, [ledgercard_1bc] Statement/Ledger Card - Deposits
 Financial Statements Cur & Old Yr, [financials_footnotes_percent] Financials Present
 Roll Form [rollform] Roll Form
 Payment Plan Statement [paymentplan] Payment Plan Statement
 Levy Notice [lnote_101] Levy Notice SA - New Style
 Meetings [meetings] Meetings
 Lot Improvements [lotimp_default] Lot Improvements (default)

Distribution Method

Post Microsoft Print to PDF (redirected)

Email Correspondence

Save Report Search Agent Reports [Settings]

Use Preferences Correspondence

Recipient Type:

Filters

Name	Post	Email	Sms
[User Icon]	PO Box 11 SUBURB STATE POSTCODE SECC		[Search]
[User Icon]	PO Box 11 SUBURB STATE POSTCODE SECC		[Search]
[User Icon]	PO Box 11 SUBURB STATE POSTCODE SECC		[Search]
[User Icon]	PO Box 11 SUBURB STATE POSTCODE SECC		[Search]

