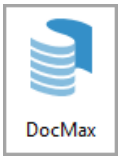
DocMax | Advanced Search and Saved Searches

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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 inhere. 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.

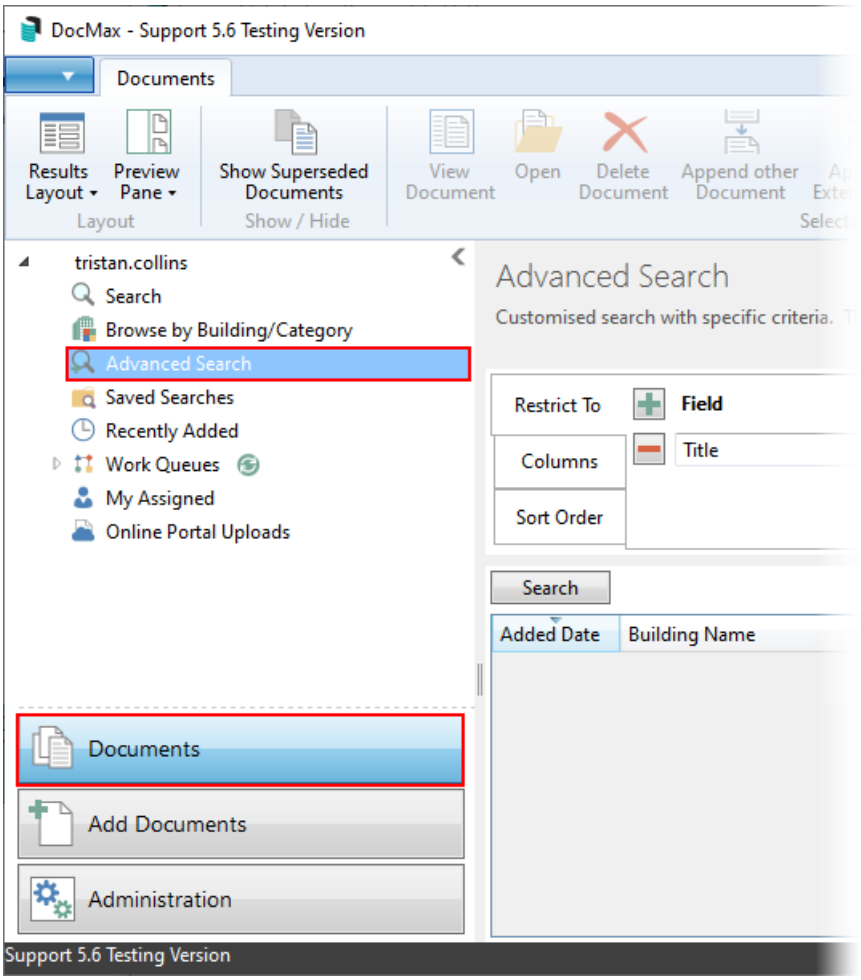
An *Advanced Search* can also be saved as a *Saved Search* for later use.

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.

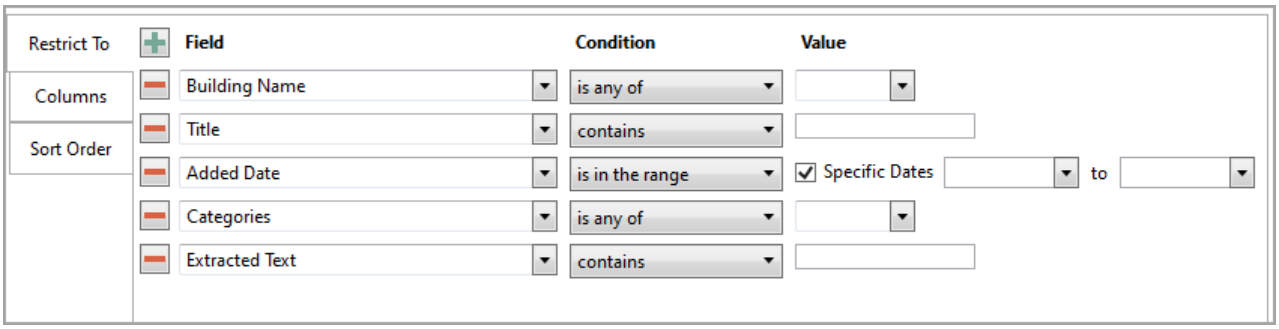
The *Condition* and *Value* options will change depending on the field selected. For example, if you choose *Added Date*, the available conditions will change to date-based options. If the condition is*is in the range*, the value area will display date options. If the condition is *is in the last 7 days*, 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



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.

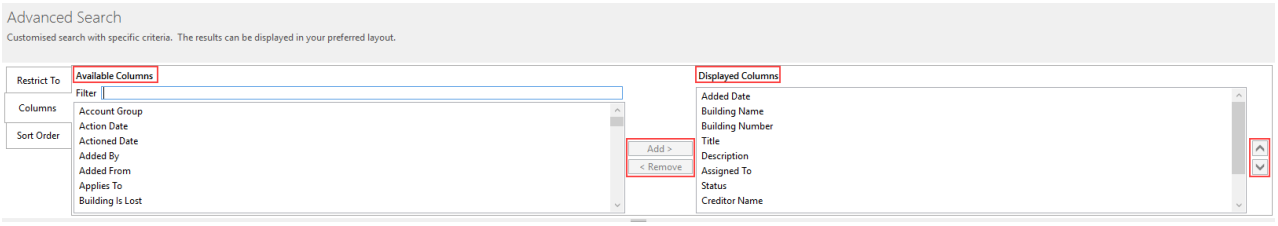
- **Invoice Manual Entry:** Use the **condition** *is equal to* and select *Yes* or *No*.
- **Creditor Invoice:** Use the **condition** *is equal to* and select *Yes* or *No*.
- **Scheduled Creditor Invoice:** Use the **condition** *is equal to* and select *Yes* or *No*.
- **Data Size:** Use this field 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. Using the Added Date and Time field helps

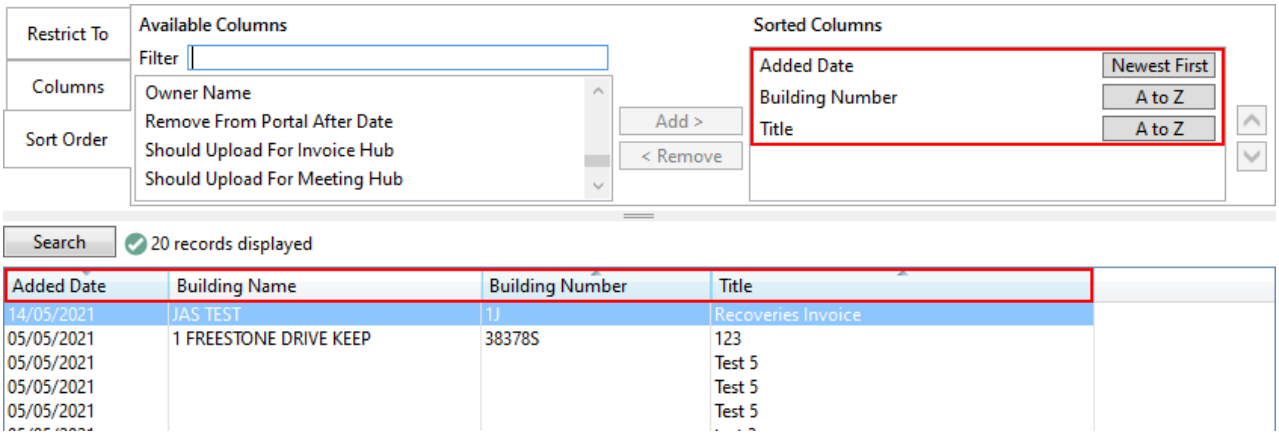
you track changes in the document history and avoids having to check the *History* area on each document.

- 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.



- 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

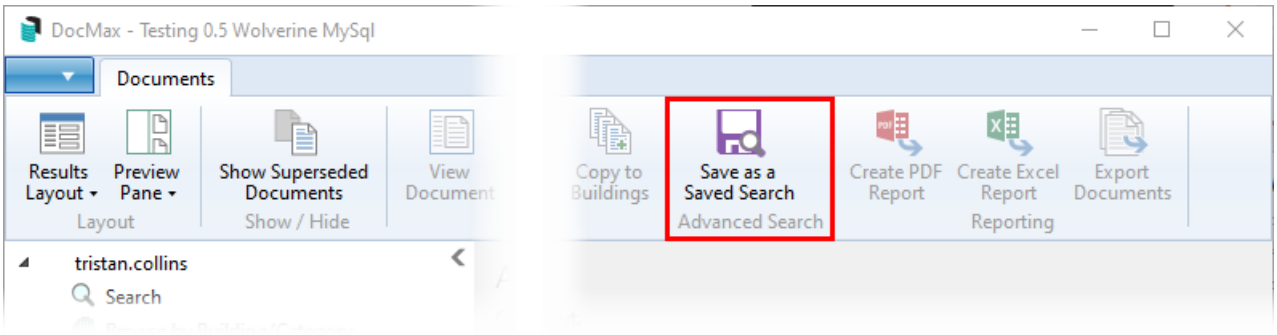
Saved Searches

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.

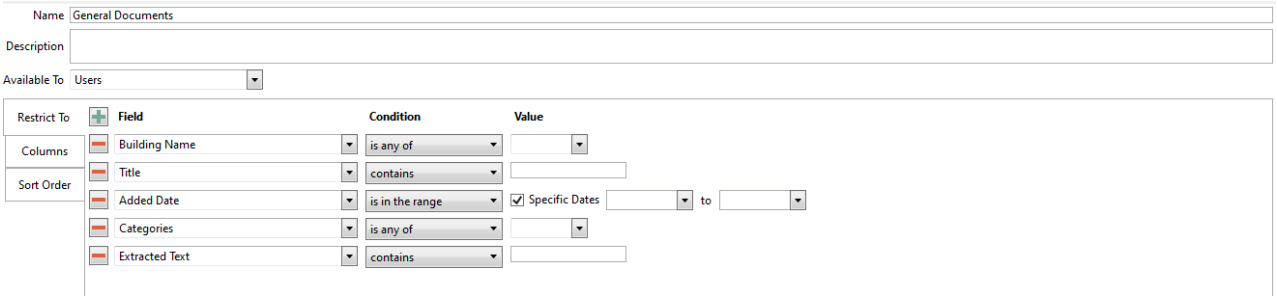
General document search

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.



Invoice saved search

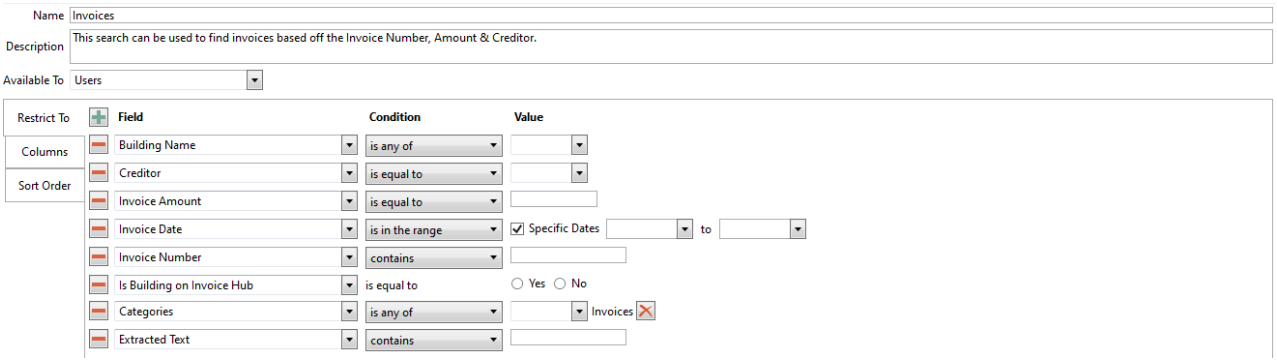
This example shows how to set up a saved search for invoice-related documents in ***DocMax***.

> 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.



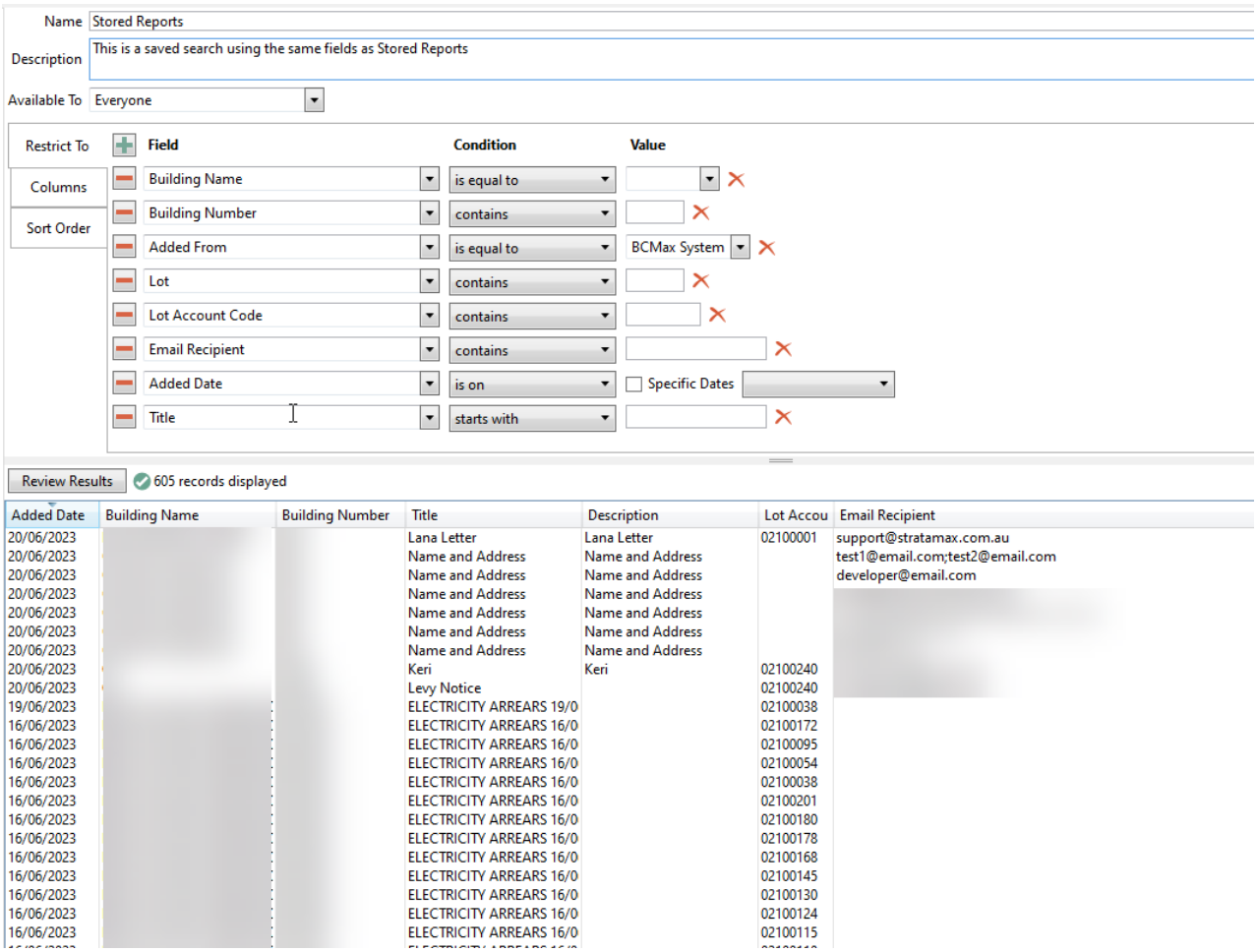
Stored report (BCMax System documents)

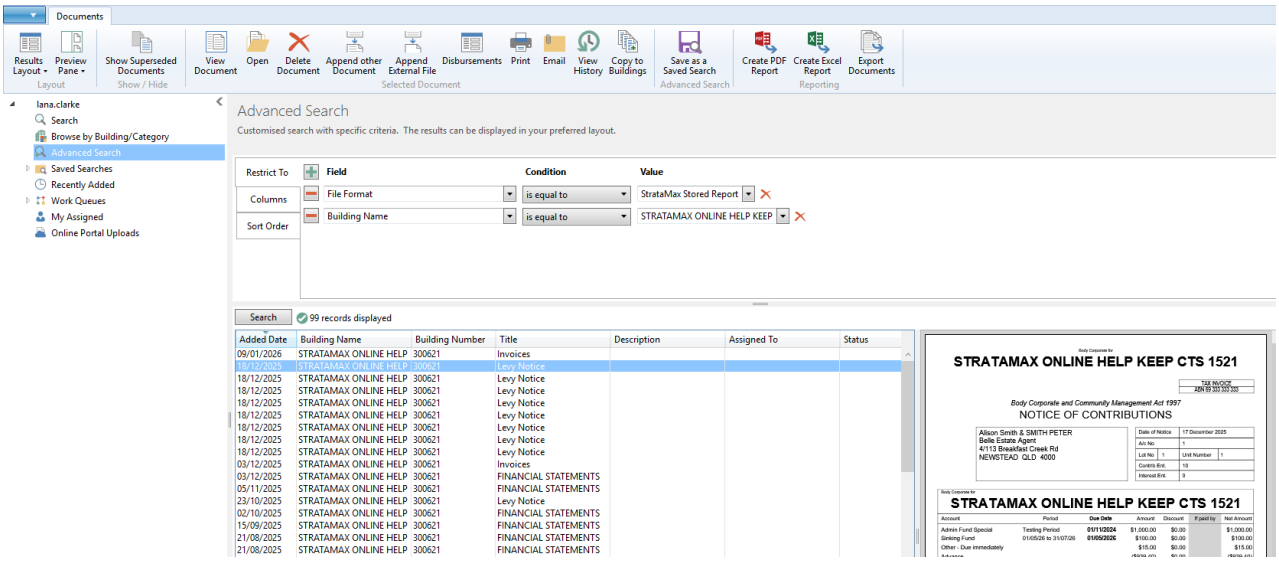
This example provides a framework for a saved search that works in a similar way to ***Stored Reports***. It can be used to report on BCMax System documents stored in ***DocMax***.

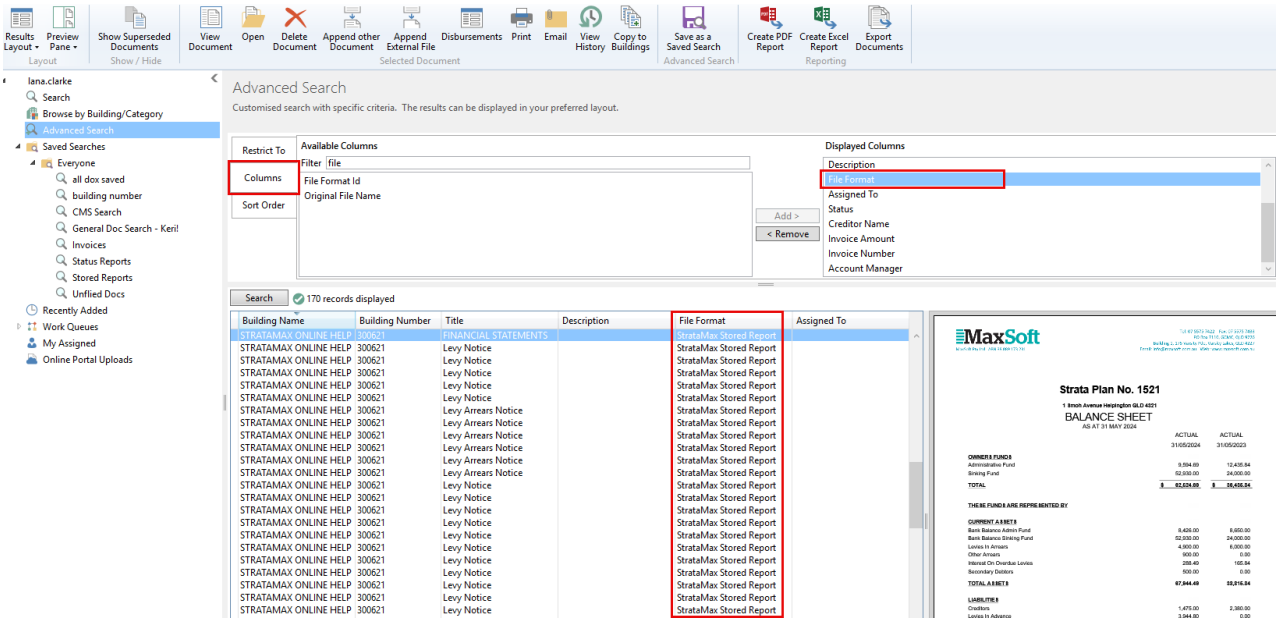
> This saved search is intended for *BCMax System* documents only. Use the restriction *Added From* **is equal to** *BCMax System* to include system-generated documents such as arrears notices, levies and ledger cards. You can also use *File Format* to search for *StrataMax Stored Report*.

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
Columns
Sort Order
Field
Condition
Value
Building Name
is equal to
Building Number
contains
Added From
is equal to
BCMax System
Lot
contains
Lot Account Code
contains
Email Recipient
contains
Added Date
is on
Specific Dates
Title
starts with
Review Results
605 records displayed
Added Date
Building Name
Building Number
Title
Description
Lot Accou
Email Recipient
20/06/2023 Lana Letter Lana Letter 02100001 support@stratamax.com.au
Name and Address Name and Address test1@email.com;test2@email.com
Name and Address Name and Address developer@email.com
Name and Address Name and Address
Name and Address Name and Address
Name and Address Name and Address
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 Pane
Show Superseded Documents
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
Columns
Sort Order
Field
Condition
Value
File Format
is equal to
StrataMax Stored Report
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
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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
15/09/2025 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
4/113 Breakfast Creek Rd
NEWSTEAD QLD 4000
STRATAMAX ONLINE HELP KEEP CTS 1521

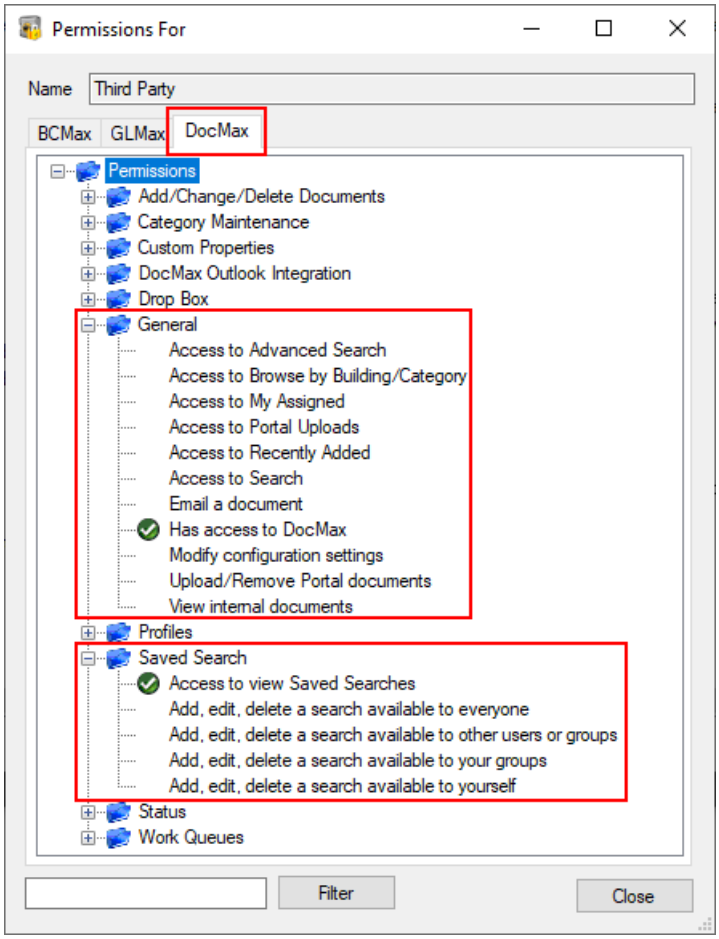


Third Party/External Users saved search

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

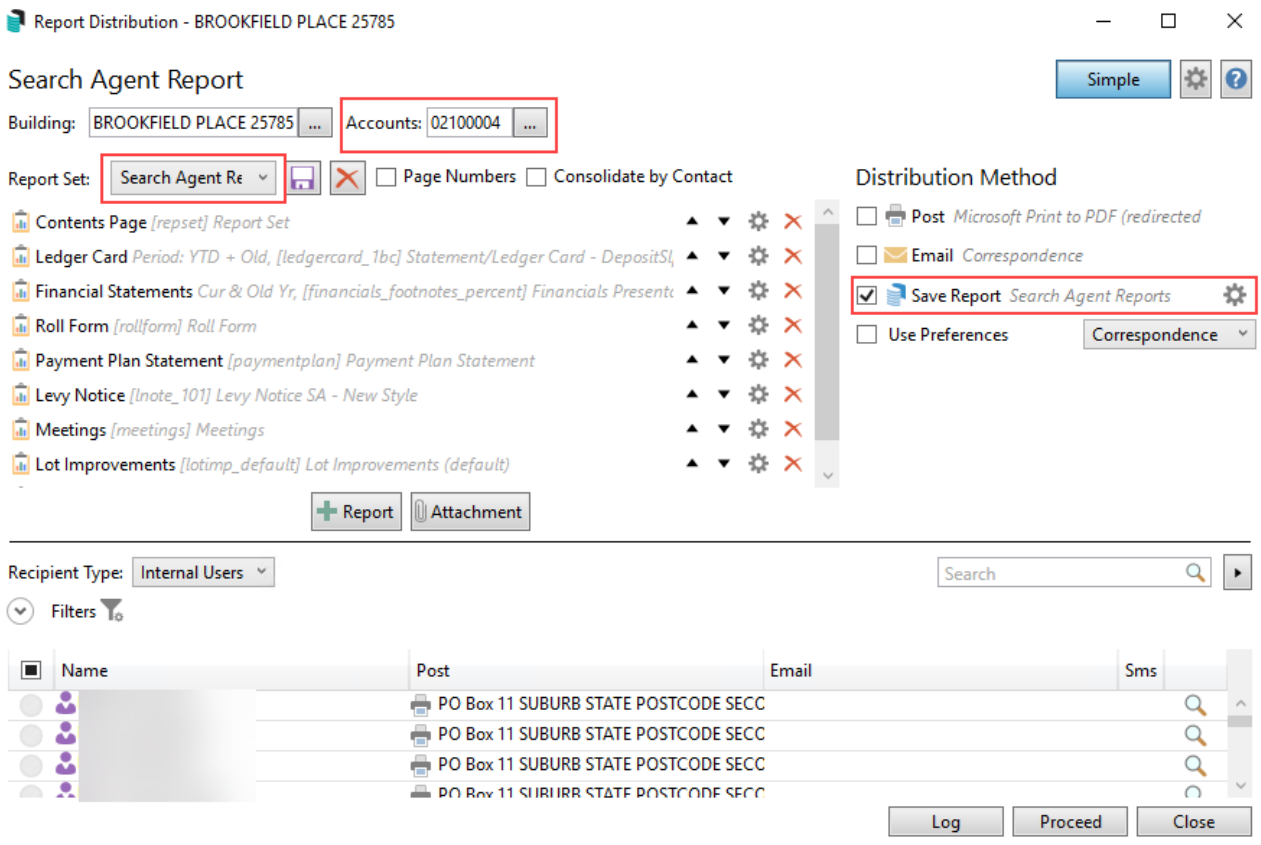
Restrict To	Condition	Value
Added Date	is in the range	Blank – selected when the search is run
Categories	is not any of	Category not included for third-party searching

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.



Common Questions

What is the new date available in DocMax?

The **Document Date** field is available as a restriction in DocMax**Advanced Search**. Use it when the date of the document is different from the **Added Date**; Document Date is recorded separately and lets you search by the actual document date rather than the date the document was added to DocMax.