TRMax Reporting

Last Modified on 30/06/2025 10:18 am AEST



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

There are a number of reports that are available for TRMax depending on the information required. All of the reports mentioned in this article are accessed from within TRMax, except for *Search Recoveries*, which has its own icon and menu.

Search Recoveries

Please see *Search Recoveries* for a very robust and simple way to display, extract, and report*TRMax* recovery data in StrataMax.



Recovery and Consultancy Reports

TRMax Recovery and Consultancy reports are now available for selection inReport Distribution. These reports can be produced as standalone reports or added to an existing report set for a single building. For global functionality, continue to use the instructions below for recovery and consultancy reports. For example, Recovery and Consultancy reports can be included in the Status Report set and will report for the period configured for the Status Report. This report should be configured in each separate window (e.g *Merge Letters* and *Status Report*) to ensure the output is consistent with the expected results.

- 1. Search or select *Merge Letters* to set individually, or *Status Report* to include in this area.
- 2. Untick *Merge Letters Only*. Search for *TRMax Consultancy* and / or *TRMax Recovery*. Repeat for each report if both are required.
- 3. Each report must be configured using the cogwheel and the following fields set.
 - Processed Date

- Operators
- Show Processed
- Show No Charge Items
- Date Range
- Template
- 4. Click Close to the configuration window.
- 5. If being used in a report set for consistent use, click the *Save* icon to save the configuration.

X Configuration	– 🗆 X
Settings	
Processed Date	v
Operators	AL,AT,an,AS,CC,CK,555,db,de,DS,EZ,GB,ja,JC,KW,KH,ke,LC,Ia,li
Show Processed	All
Show No Charge Items	All ~
Date Range	Current Month ~
Template	
Template	consultancy001 Consultancy Cost Report - Time and Charge ~
	Close

Recovery Records Report

This report presents all recoveries that have been processed for a specific period.

- 1. Search or select TRMax.
- 2. Click Reports.
- 3. Select Recovery Reports.

📄 TRMax - C	Cost Recovery and Consultancies : STRATAM	AX ONLINE HELP, 11			_	- 🗆	×
FileRepor	rts Tools						
Reur	Recovery Reports				Action		
Rec 🦉 (Consultancy Reports	lanager Company	Recovery Code	Recove	Ch	ange Building	1
(Operator Hours Summary (Excel) Report	DMP1	23	Arrears F		-	
	Quick Report	DMP1	23	Arrears F		New	
		DMP1	23	Arrears F		Open	
						Open	
						Delete	
					Edit	Invoice Rate	es
					Edit Co	onsultancy R	ates
					E	dit Operators	
						Close	
					Options		
					O Ali	This Building	ilding
<				>	All	O Mine	
3 of	3					ocessed Process	
Manag	ger: Tristan Collins No of Lots: 24	Building Type: B.F.	Р.				:

4. Click the drop arrow to view reports available and select the appropriate report.

膏 TRMax Report Data Opt	ons	×
Recovery Records Report		
Recovery Records Report		
Period Records Report		
Time Sheet Report		
Time and Cost Report		
Charge Report		
Period Report - Summary Operator Report		
Recovery Report - With Oper	tor ID	
	me Order (Recovery Subtotals)	
Recovery Report - Building N		
Period Records Report - By O		
Recovery Report - Manager (
Period Records Report (No R Operators:	All	
operatora.		
Recovery Code:	All	
Processed:	All	~
Show No Process Items:	All	~
	Export To Excel	Run Report Close

- 5. Enter the required criteria.
 - Options available:
- a. Manager Company, select GLMax Company if there is more than one company.
- b. Buildings, tag buildings for report if required.
- c. Date Range, either enter a date range or select predetermined from the drop list.

- d. Processed Period, select processed date if required.
- e. Operators, tag if required.
- f. Recovery Code, tag if required.
- g. Processed, select from the drop list.
- h. Show No Process Items, select from the drop list.

1	TRMax Report Data Opt	ions	\times
Re	ecovery Records Report		\sim
F	ilters Format Options		
а	Manager Company:	TRAINING COMPANY	
b	Buildings:	All	
c	Date Range:	to V	
d	Processed Period:	~	
е	Operators:	All	
Ð	Recovery Code:	All	
g	Processed:	Ali 🗸	
h	Show No Process Items:	All 🗸	
		Export To Excel Run Report Close	

- i. Click on the tab *Format Options* and tick selections as required.
- j. There is an option to Export To Excel.
- k. Select *Run Report* to produce report to screen.
- I. Select Close to exit the Report Data Options.

Consultancy Reports

This report details the records for consultancy against the actual cost.

- 1. Search or select TRMax.
- 2. Click Reports.
- 3. Click Consultancy Reports.
- 4. Select Consultancy Cost Report.
- 5. Apply settings.
- 6. Click Export to Excelor Run Report.

Operator Hours Summary (Excel) Report

1. Search or select *TRMax*.

- 2. Click Reports.
- 3. Click Operator Hours Summary (Excel) Report
- 4. Enter 'Start Date' and 'End Date' and clickOK.

Quick Report

The quick report will report the information showing on your screen from 'Options', selected on the bottom right of your screen - 'All' / 'This Building' and 'All' / 'Mine', 'Processed', 'No Process'.

- 1. Search or select TRMax.
- 2. Select Reports.
- 3. Click Quick Report.

Filtering and deleting multiple TRMax records

- 1. Search or select TRMax.
- 2. Set Options accordingly Building and User selections.
- Right click on any column, and the option to filter will be displayed and you can then show all e.g. Email and delete multiple records.
- 4. Click Tools and then 'Select Multiple Rows'.
- 5. Click the rows you want highlighted by using your mouse and the shift or control keys.
- 6. Click Delete.
- 7. Click Yes to the message.