Management Fees Report

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

Management Fees Report function is for reporting what is set up in ***Management Fees Setup*** and allows reporting to Excel. All fields from ***Management Fees Setup*** and the following fields from ***Building Information*** can be included in the report (Building Number, Building Name, Account Manager, Active Lots, Taken on Date, Management Office, and Financial Year Start & End Dates). The report can be used for all buildings or selected buildings.

Management Fees Report Video

Your browser does not support HTML5 video.

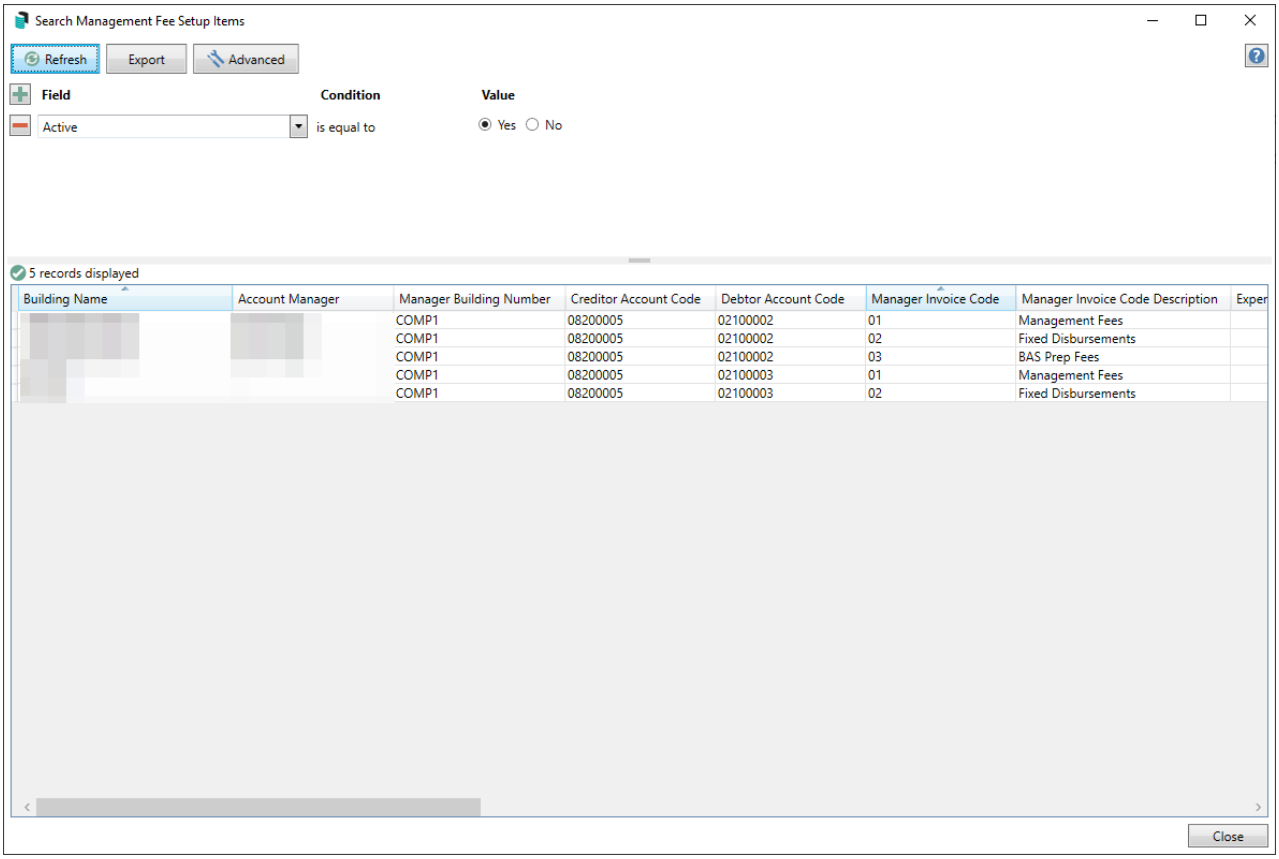
Management Fees Report

Using filter options Management Fee data can be limited to what needs to be reported whether it is based on specific date ranges, account managers, active / non active fees etc. Clicking on the Advanced option allows for columns to be included/excluded, setting of the sort order and limiting the maximum number of records to report.

The setup of ***Management Fees Report*** is retained for individual users therefore when a user enters the screen the same fields, conditions and values will be displayed based on when the screen was last accessed, and the user can click the *Refresh* button to display the results.

Column names can be clicked on to sort by the specific column.

In the example below, all Active Management Fees are reported. This field when marked as Yes ensures only fees that are active will be reported therefore it is recommended for most reporting scenarios.



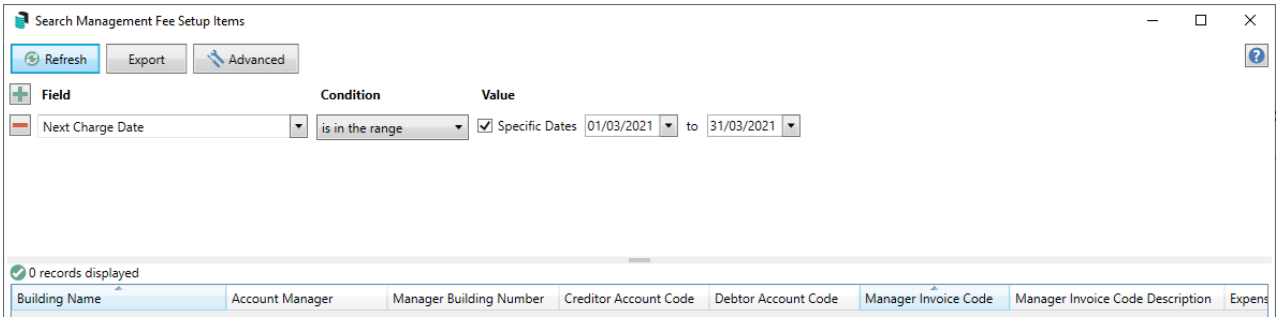
Management Fees Report Setup

Setting Up Filters

Using filters, the results of the report can be based on specific requirements. To set up the reporting requirements follow the below steps:

1. Select the green plus button to add a filter.
2. Select the **Field** by clicking the drop-down menu.
3. Based on the selected **Field,** the **Condition** can be changed if required.
4. Select the required **Value**.
5. Additional fields can be added by clicking the green plus button and following the above steps.
6. Click the *Refresh* button to load the results.
7. Click the *Export* button to display the results in Excel.
    - If needing to remove a field, select the red minus button next to the field.

In the below example the data reported will be invoices that will charge between the dates of 1st of March and 31st March 2021.



Setting Display Columns & Sort Order

The displayed columns can be changed by clicking the *Advanced* button, the selecting the *Columns* tab. Select the required column and use the *Add* and *Remove* buttons. In the displayed columns section use the *Up* and *Down* arrows to move the required columns.

