Management Fees Report

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.
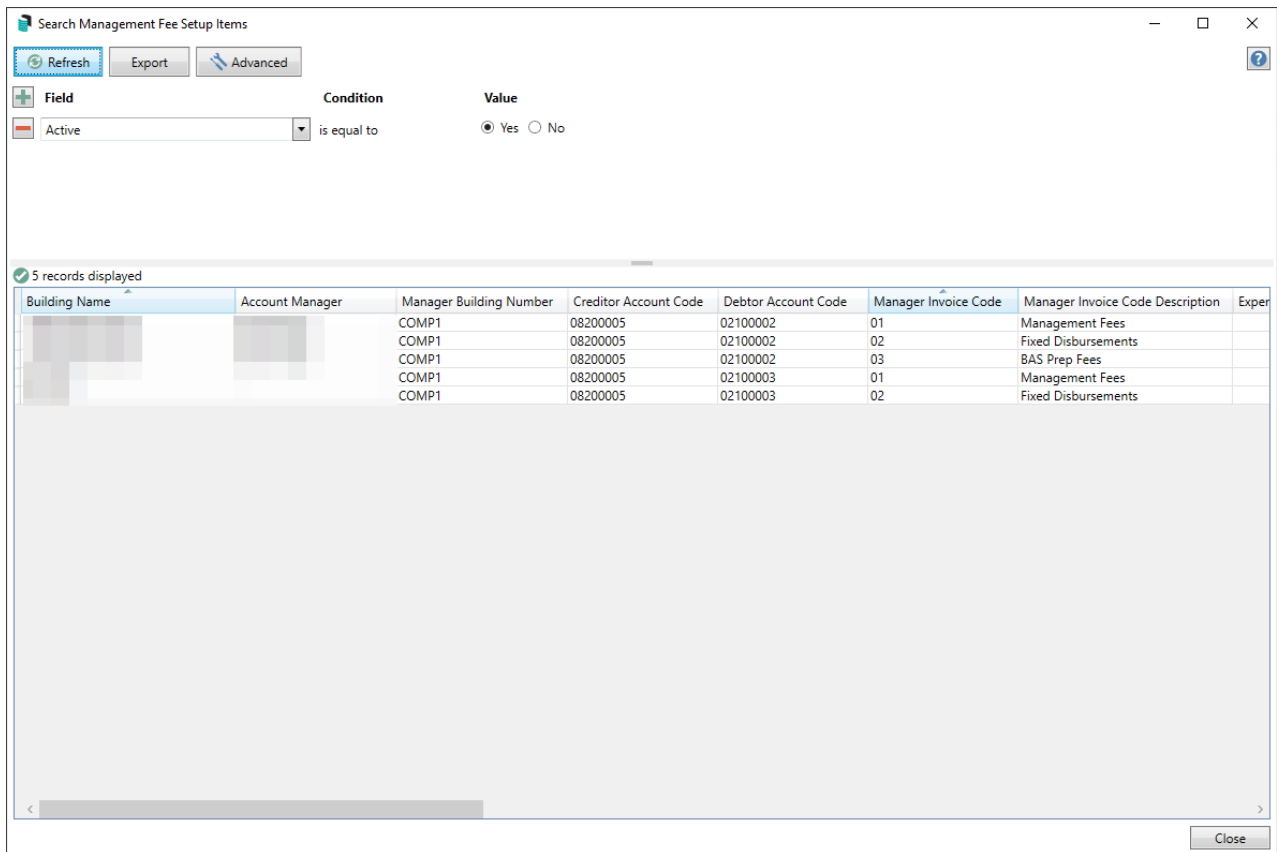
Management Fees Report Setup

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.
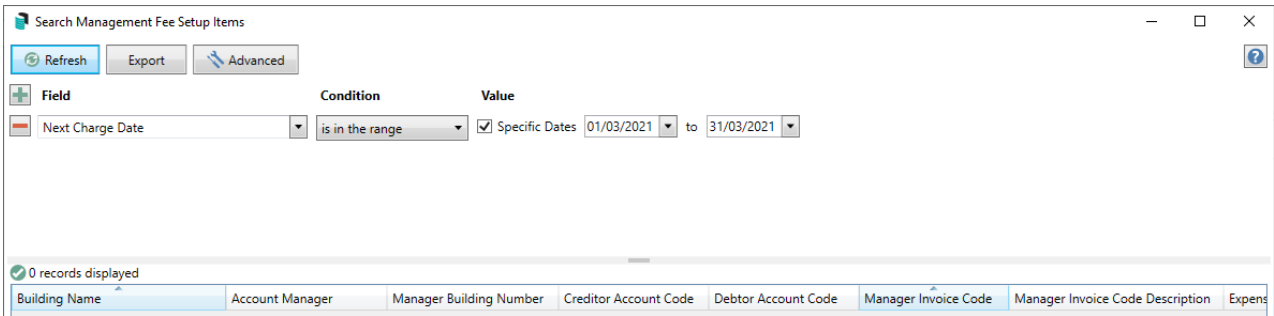
Setting Display Columns & Sort Order

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.
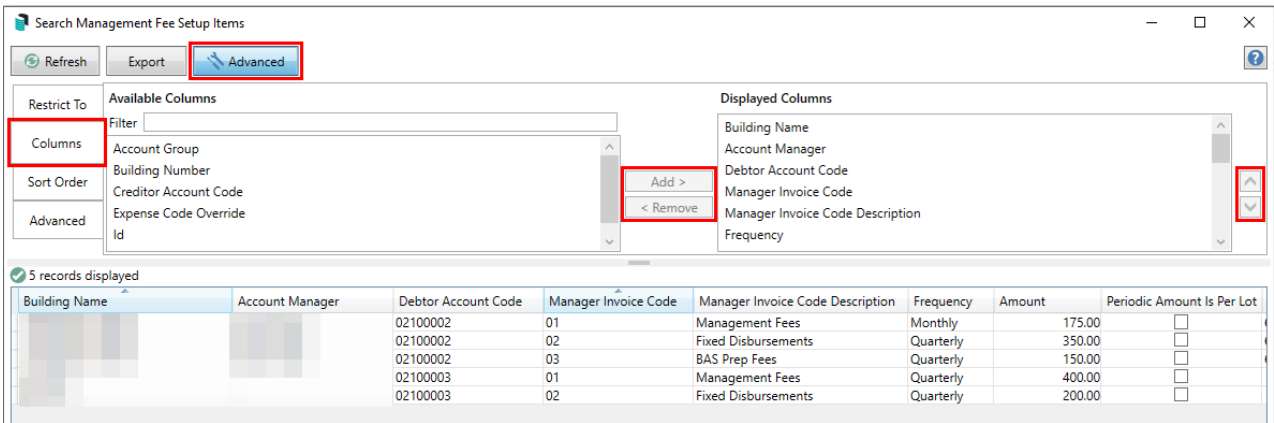
# Management Fees Report | Saved Searches

'Saved Searches' are designed for convenience so that you can save a selection of fields, columns, and a specific sort order so that it can be loaded later.

'Saved Searches' can also be set as the 'default' search for the selected screen. This means that the selection of fields, columns, and specific sort order will be the one chosen whenever the menu screen/icon is selected.

'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

Saved Searches | Security Setup Permissions

A security permission will either allow or deny individual *Users* or *User Groups* access to create or delete a search. The permission is called 'Save Group and Saved Searches' under the 'Menus' category in **Security Setup**. You can also type the word 'Search' into the filter field and click the *Filter* button to see the permission.
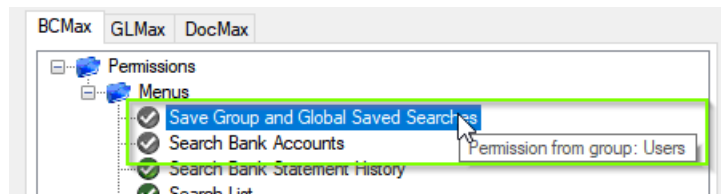
If the *User* or *User Group* do not have the permission set to 'Allow' then the ability to save a search for all users or a user group will be inactive.
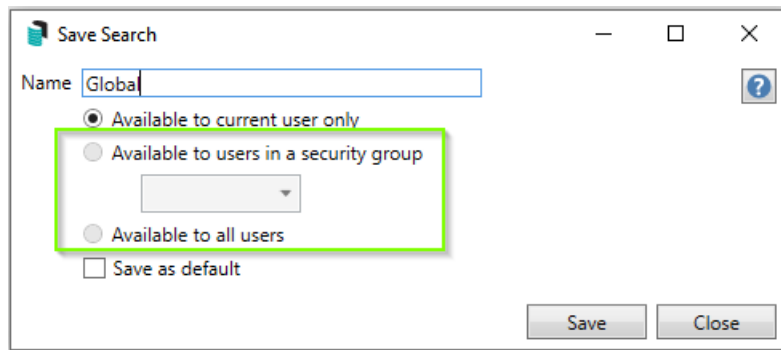
Saved Searches | Set up a new Saved Search

1. Configure the required fields and click the *Refresh* button to display the required data.
    - Optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
2. Click the *Refresh* button to display the data.
3. Click the *Save Search As* button, and the 'Save Search' window will appear.
4. Enter a 'Name'.
5. Select one of the three radio buttons, depending on your requirement:
    - *Available to current user only* will save the search for the current user only.
    - *Available to users in security group* will save the search for the *User Group* selected from the drop-down (this radio button is only available if you have the right permission, and the *User Groups* available in this list are limited to the *User Groups* that you are a member of).
    - *Available to all users* will save the search for all StrataMax users (this radio button is only available if you have the right permission).
6. Optionally tick the *Save as default* box to load this 'Saved Search' whenever the menu screen/icon is opened.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search*, or click the red cross button to delete the *Saved Search*.
3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh

automatically and load the *Saved Search* data.

4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

Saved Searches | Edit a Saved Search

1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.

2. In the 'Load Search' window, click the blue *Load* button.

3. Now make any changes required to the required fields, and optionally click the *Advance* button to also configure the displayed columns, and specific sort order.

4. Click the *Refresh* button to display and check the data.

5. Click the *Save Search* button to save the applied changes.