

Report Distribution

Last Modified on 03/03/2026 9:38 am AEST

Report distribution is the area that provides report sets tailored for specific purposes. This screen will offer functionality to run single reports for the various roll reports, or add to a combined report set that can be saved to run regularly.

This screen will use several owner-designed reports and others for internal users to deliver reports. It is essential to review these areas when applying the report.

These icons will open the *Report Distribution* screen, providing the appropriate recipient list for that type of report. For example, **Merge Letters** will offer the 'Owners List' from the Main or 'Other Debtors' from the Sub-Group, and the **Roll List** will default to the 'Internal Recipient' list in the Main (based on users in **Security Setup**).

The *Distribution Method* settings are unique to each area and, when amended, will hold in that particular area for the following distribution. The Report Set option will also include these settings in each area.

Please note that the Reports available in Report Distribution have been rewritten. Please see the **Report Set** option for other reports that may not be available in this list. The current list will be added and extended as further reports are rewritten and available via the [Release Notes](#) for details as they are released.

Report Distribution overview

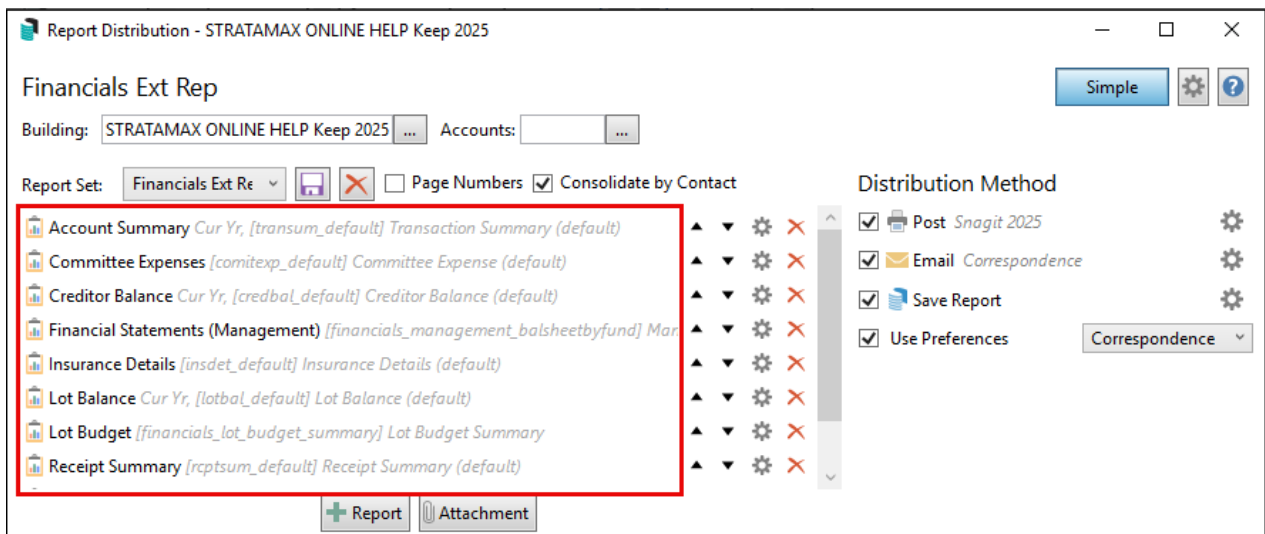
This section of the article describes the different main buttons, fields, and tick boxes in the top left of the 'Report Distribution' window. The 'Distribution Method' tick boxes are explained in the next section down.

1. **Building:** This building selector tool can tag multiple buildings and apply standard building filters - for example, by Account Manager or Financial End Month. Remember to clear any building filters that may have been applied after to ensure the next process runs with the buildings required.
2. **Report Set:** Selecting from a pre-configured report set that includes merge letters, attachments, and reports is what this option is designed for. The save and delete icons next to the drop-down selection for the report set will control what action is taken for the selected report set.
3. **Page Numbers:** Configuring this setting will include page numbers with a paragraph centre position

on the merge letter and all attachments.

4. *Consolidate by Contact*: This option will consolidate the merge letter and any attachments into one pack for distribution. With this configuration selected, any contact that owns multiple lots will deliver one instance, including all documentation batched into report order. For multiple buildings, this contact will receive one for each.
5. *+ Report*: Selecting this button will provide access to various building (building icon), owner (person icon) and global (globe icon) reports that can be added to a report set.
6. *Attachment*: This will open an *Add Document* window from DocMax, allowing the user to navigate to the attachment, which may be saved in DocMax or added from a folder location.
7. *Up / Down arrows*: Use these to change the order of documents and reports.
8. *Report / Document Cogwheel*: This opens the 'Configuration' window for that specific document or report.
9. *Red Cross / X*: Removes the report or document from the window so it won't be produced or sent.

When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.



Distribution Method Settings

This section of the article goes into detail about each of the tick boxes under the 'Distribution Method' heading.

Post

For all post copies, this will control the printer, including any BING printers, and where you can access

the Bing Mail Settings. The currently configured printer will be displayed. To print to Bing, ensure the printer is set to 'Bing Easy Post API' and that *Use Bing for Print* is ticked.

Email

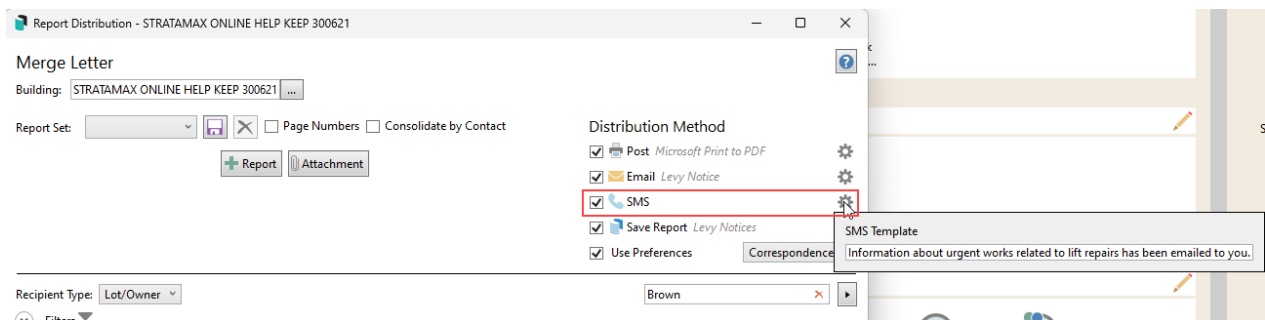
The *Email Subject*, *Email Body*, *From Address*, and *Email Delivery Preference* are configured here for all email copies, including email merge fields. The current email delivery preference for the recipients is displayed.

Using BING for email is also controlled here and is available using the BING API (**charges may apply - contact Bing for further information**). Tick the *Use BING for Email* to send email to BING for processing. Emails sent via Bing will not be in the log in **Communication**.

Please note that the *Use Bing For Email* has a permission in **Security Setup**.

SMS

If using a third-party **SMS service**, this can be configured to deliver to those recipients who have a valid mobile number. This is also where the SMS template is set. If this service is not enabled, the SMS distribution method will not be displayed.



Save Report (DocMax)

The *Save Report* tick box will save the document and all attachments to **DocMax**. The current selected profile (if selected) will be displayed on screen too. Select the appropriate profile before generating the reports or documents to allow the *BCMax System Document* to be added to **DocMax**.

Use Preferences

Each contact has their own delivery preference. This tick box controls whether or not to use the contact's preferences when sending a document, and the drop-down controls which delivery preference to adhere to. Without using preferences, the default will be posted.

The *Title* field in **DocMax** will reflect the document or report name, and the *BCMax System Document* serves as the *Added From* condition when searching for these documents in **DocMax**.

Recipients & Filters

The *Recipient Type* drop-down menu will determine who receives the report or document. By clicking the drop-down menu you can select a different recipient type.

- 'Lot/Owner' is selected by default when merge letters and other owner-type reports are being sent. This recipient type will observe the different contacts in the **Roll** and depending on if the *Use Preferences* box is ticked under the 'Distribution Method' section, it will change the recipient list - how and who it's sent to. More filters are available for this recipient.
- 'Other Debtor' recipients are in a Sub-Group, who are in **Debtor Maintenance**. More filters are available for this recipient.
- 'Letting Agent' will observe any lettings agents that are recorded in the **Roll**. No filters are available for this recipient.
- 'Owner' will observe owners only in the **Roll** and will not observe any letting agents or other contact types. No filters are available for this recipient.
- 'Tenant' will observe any tenants that are recorded in the **Roll**. No filters are available for this recipient.
- 'Creditor' will observe any creditor that are recorded in the **Creditor Maintenance**, including any that are hidden. No filters are available for this recipient.
- 'Office Bearer' refers to committee members in **Office Bearers**. More filters are available for this recipient.
- 'Applicant' observes contacts in **Applicant Maintenance**.
- 'Resident' will observe any contacts in the **Roll** that reside in a lot. This will be tenants and any owners that have the *Is Owner Occupied* tick box selected in the 'Change of Details' screen. More filters are available for this recipient.
- For 'Internal Users' this will display the Users who are set up in **Security Setup**.

Committee Member radio buttons are only available when the 'Lot/Owner' is selected in the *Recipient Type* drop-down menu, and will determine how to treat committee members.

- *All*: Will include all owners or lot contacts, regardless of whether they are a committee member or not.
- *Exclude*: Will exclude committee members from the list of recipients.
- *Only*: Will only include committee members in the recipient list.

Lot Type radio buttons are only available when the 'Lot/Owner' is selected in the *Recipient Type* drop-down menu, and will determine whether or not other lot types, Car Space and/or Storage Space, are included in the recipient list.

Duplicate has the *Copy to Owner* box. This can be ticked so that the owner receives a copy of the report or document. This applies specifically when the lot contains an agent, mortgagee, or other contact type in the **Roll** that has been configured to receive the lot's correspondence or levy notice - i.e. when the

Send Correspondence to Agent, Mortgagee or Otherbox is ticked, see [Roll Correspondence Preferences](#) for more details.

Include only tick boxes and observe various settings in the [Roll](#) screen.

- *Committee Meeting Minutes, Committee Meeting Notices, and Advertising OK:* Refer to the corresponding tick boxes found in the 'Edit Correspondence Preference' window. See [Roll Correspondence Preferences](#) for more details.
- *Owner Occupied:* Observes the *Is Owner Occupied* box, which is configured for each contact, accessed by editing the contact details in the [Roll](#) screen. See [Contact Change of Details](#) for more info.
- *Intro Letters Not Sent:* Ticking this box will filter the list to those owners who have not received the StrataMax Introduction letter. This is useful if you want to send the StrataMax Intro Letter manually instead of sending it during a [Change of Ownership](#).

Recipient Type: Lot/Owner Search

Filters

Committee Member: All Exclude Only

Lot Type: Include Car Spaces Include Storage Spaces

Duplicate: Email copy to owner

Include Only: Committee Meeting Minutes Committee Meeting Notices Owner Occupied Advertising OK Intro Letters Not Sent

<input checked="" type="checkbox"/>	Account	Lot	Unit	Name	Behalf Of	Post	Email	Sms
<input checked="" type="checkbox"/>	02100001	1	1					
<input checked="" type="checkbox"/>	02100001	1	1					
<input checked="" type="checkbox"/>	02100001	1	1					
<input checked="" type="checkbox"/>	02100002	2	2					
<input checked="" type="checkbox"/>	02100003	3	3					

Log Proceed Close

Select all is a tick box on the far left of the header of the recipient list table, and is for easily selecting / tagging or removing all recipients in the list. The same function as the keyboard shortcuts *Ctrl+A* and *Ctrl+X*.

Recipient Type: Resident

Filters

Owner if no tenant Use lot address (if available)

<input checked="" type="checkbox"/>	Account	Lot	Unit	Position	Name	Post	Email	Sms
<input checked="" type="checkbox"/>	02100001	1	1	Tenant	Doctor Tim Tenant	Unit	tim@ten-ant.com	
<input checked="" type="checkbox"/>	02100002	22	22	Owner	Mike	PO B	coolum@gmail.com	
<input checked="" type="checkbox"/>	02100002	22	22	Owner	Loga	2301	@gmail.com	

Search is available for larger lists and can have the recipient details entered (except the 0210000X record), which will highlight the record for tagging.

Recipient Type: Lot/Owner Search

Filters

<input type="checkbox"/>	Account	Lot	Unit	Name	Behalf Of	Post	Email	Sms
<input checked="" type="checkbox"/>	02100001	1	1	Alison Clare Smith		sjfasjfkjkljdsfjkl	asmith@bigpond.com	0427 182 050
<input type="checkbox"/>	02100001	1	1	Peter Smith		1703/6 Sickle Ave HOPE	psmith@bigpond.com	61448886925
<input type="checkbox"/>	02100002	22	22	Logan Puka		2301/212 Margaret Stre	logan.puka@gmail.com	0406 304 894
<input type="checkbox"/>	02100002	22	22	Mike Brown		PO BOX 581 Coolum Q	mikebrowncoolum@gr	0428736672
<input type="checkbox"/>	02100003	3	3	Bertie Bubbles		1 Bubble Road	bubbles@email.com.au	
<input type="checkbox"/>	02100004	4	4	Coco Chanel		1 Perfume Street PARIS		
<input type="checkbox"/>	02100005	5	5	Raine & Horne	Professor Dave Danger	Suite 2&3, 42 Refinery	reception@rhcityliving.	0401 469 964
<input type="checkbox"/>	02100006	6	6	E Kocak		67/311 Anketell Street	edaemine.kocak@gmai	0423186603

Recipient List Export

To export the recipient list for use in a third-party application, such as Microsoft Word, follow the instructions below to generate the list.

1. Search or select **Merge Letters**.
2. Click **Cancel** on the Merge Letter list.
3. Review the Distribution Method and tag the appropriate options.
4. The default recipient list will be the Lot/Owner type. Adjust if required.

Report Distribution - STRATAMAX ONLINE HELP KEEP 300621

Merge Letter

Building: STRATAMAX ONLINE HELP KEEP 300621

Report Set: Page Numbers Consolidate by Contact

Distribution Method

- Post Upload to Bing EasyMail
- Email Levy Notice
- SMS
- Save Report Correspondence
- Use Preferences Correspondence

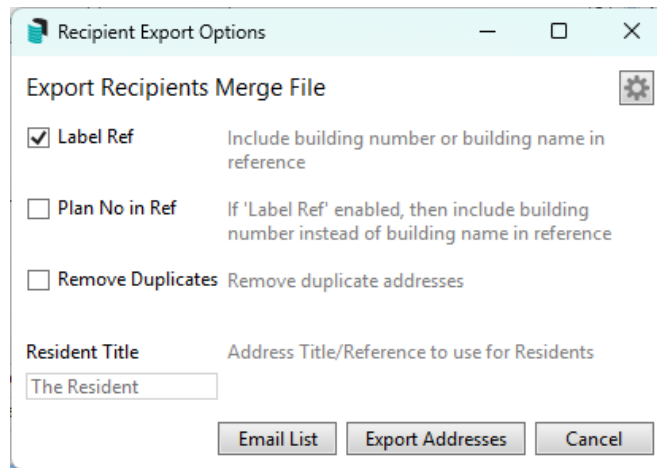
Recipient Type: Lot/Owner Search

Filters

<input checked="" type="checkbox"/>	Account	Lot	Unit	Name	Behalf Of	Post	Email	Sms
<input checked="" type="checkbox"/>	02100001	1	1	Alison Clare Smith			asmith@bigpond.com	
<input checked="" type="checkbox"/>	02100001	1	1	Peter Smith			lana@bigpond.com	
<input checked="" type="checkbox"/>	02100002	22	22	Logan Puka			@gmail.com	
<input checked="" type="checkbox"/>	02100002	22	22	Mike Brown				
<input checked="" type="checkbox"/>	02100003	3	3	Bertie Bubbles			bubbles@email.com.au	
<input checked="" type="checkbox"/>	02100004	4	4	Coco Chanel		1 Perfume Street PARIS FR		
<input checked="" type="checkbox"/>	02100004	4	4	IVY Realty - No Levies	Coco Chanel		levies@ivyrealty.com.au	
<input checked="" type="checkbox"/>	02100004	4	4	JASBEER KAUR KHERA (PROXY)	Coco Chanel	49/45-51 Balmoral Road N	jasbeerkhera@gmail.com	
<input checked="" type="checkbox"/>	02100005	5	5	Raine & Horne	Professor Dave Danger		reception@rhcityliving.co	

Please add a report

5. Right-click and **Export Recipient List > To Excel** OR **Merge File** for a text document version. If using the Merge File option, there are other fields/ options that can be controlled for the file output as per below.



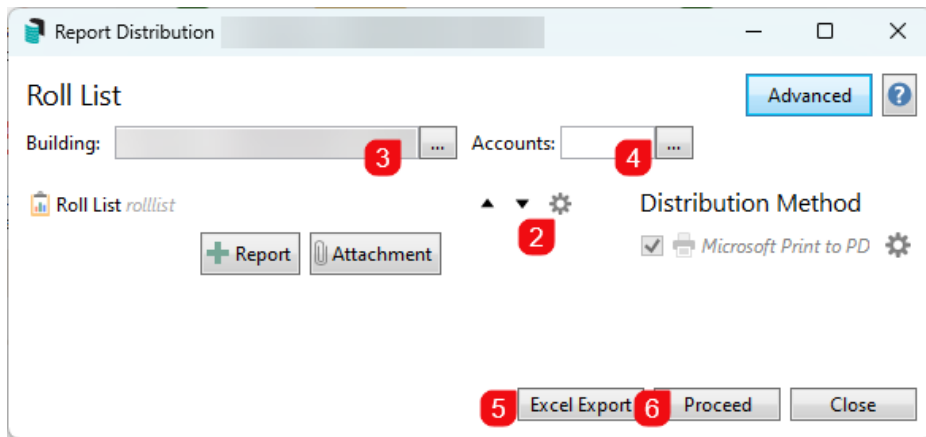
6. Save the file in a known location.

Simple Mode

Internal reports can be produced in simple or advanced mode. Advanced mode will show all options in the Report Distribution screen, while Simple mode will display a smaller screen with reduced options to allow for quick report production. The steps below are for the Simple mode. To switch to Advanced mode, click *Advanced*.

1. Search or select the appropriate report.
2. The report name will be confirmed in the top right corner. Select the cogwheel to set the template and configuration options. When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.
3. If multiple buildings are to be included, tag the required buildings using the Building field.
4. If selected accounts are required only for the report, click *Accounts* and tag the associated accounts.
5. If the report is to be exported to Excel for a single building, click *Excel Report*. This will create a workbook ready for further Excel review.
6. Click *Proceed* to produce the report to the screen and then select *Proceed* from the preview window.

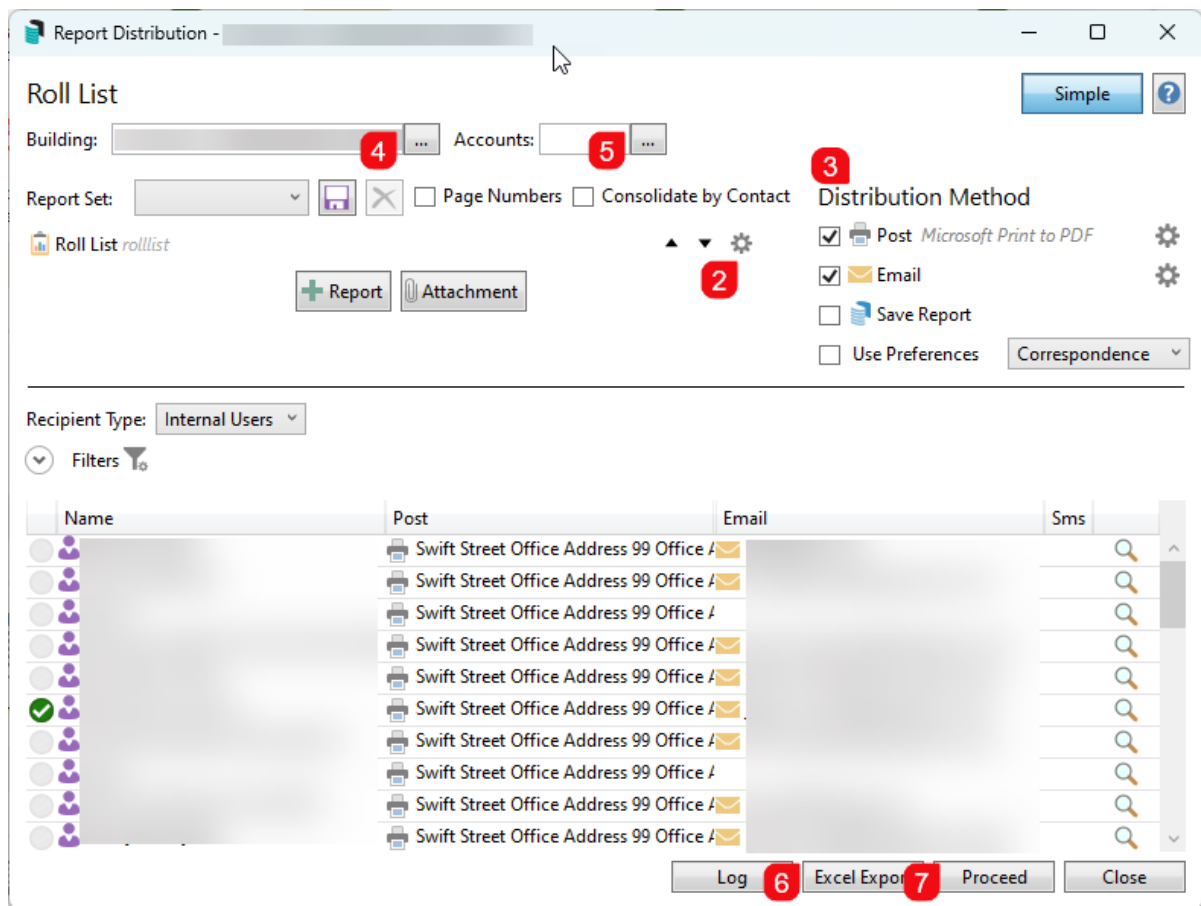
NOTE: The Email, Save to DocMax and Save icons are available if preferred.



Advanced Mode





Advanced mode will show all options in the Report Distribution screen, while Simple mode will display a smaller screen with reduced options to allow for quick report production. The steps below are for the Advanced mode. To switch to Simple mode, click on the Simple button.

1. Search or select the appropriate report.
 2. The report name will be confirmed in the top right corner. Select the cogwheel to set the template and configuration options. When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.
 3. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post* (print) *Email* and *Save Report* (DocMax). Set as required from each cogwheel.
 4. If multiple buildings are to be included, tag the required buildings using the Building field.
 5. If selected accounts are required only for the report, click *Accounts* and tag the associated accounts.
 6. If the report is to be exported to Excel for a single building, click *Excel Report* to create a workbook ready for further Excel review. This file can be saved and used where required OR:
 7. Select either *Proceed* or select the *Magnifying Glass* (single contact selection) icon to preview the report.
 8. From the preview window, select *Proceed* to send the report via the set *Distribution Method*.
- NOTE: The Email, Save to DocMax and Save icons are available if preferred.*



9. The *Distribution Method* (Options) will be displayed from the *Report Publish* preview window, including the email body and a document preview (and any attachments).
10. From this *Report Publish* window, click *Proceed* to distribute via the set distribution method or use the *DocMax* icon to save to DocMax, or the *Save* icon to save to a network location.

Icon Guide

-  Shows Report Data for the individual contact. This document or report contains Roll contact card merge fields and is specific to the lot.
-  Shows Report Data for the selected account. This type of document or report is specific at the lot level and does not rely on Roll contact cards.
-  Shows Report Data across all buildings. This type of document or report does not contain roll-specific merge fields.
-  Shows Report Data for selected buildings. This type of document or report does not contain roll-specific merge fields.

Email Template Setup

Please refer to the [Email Template Manager](#) article to learn how to manage email templates, including setting temporary ones for one-off use.

Report Set

The following will assist in setting up report sets for the available templates in their respective areas. For example, the **Ledger Card** or **Roll List**.

Create

Creating, editing, and generating report sets is a streamlined process designed to efficiently manage reports, tailored to specific needs such as meetings, financial year ends, audits, and tax.

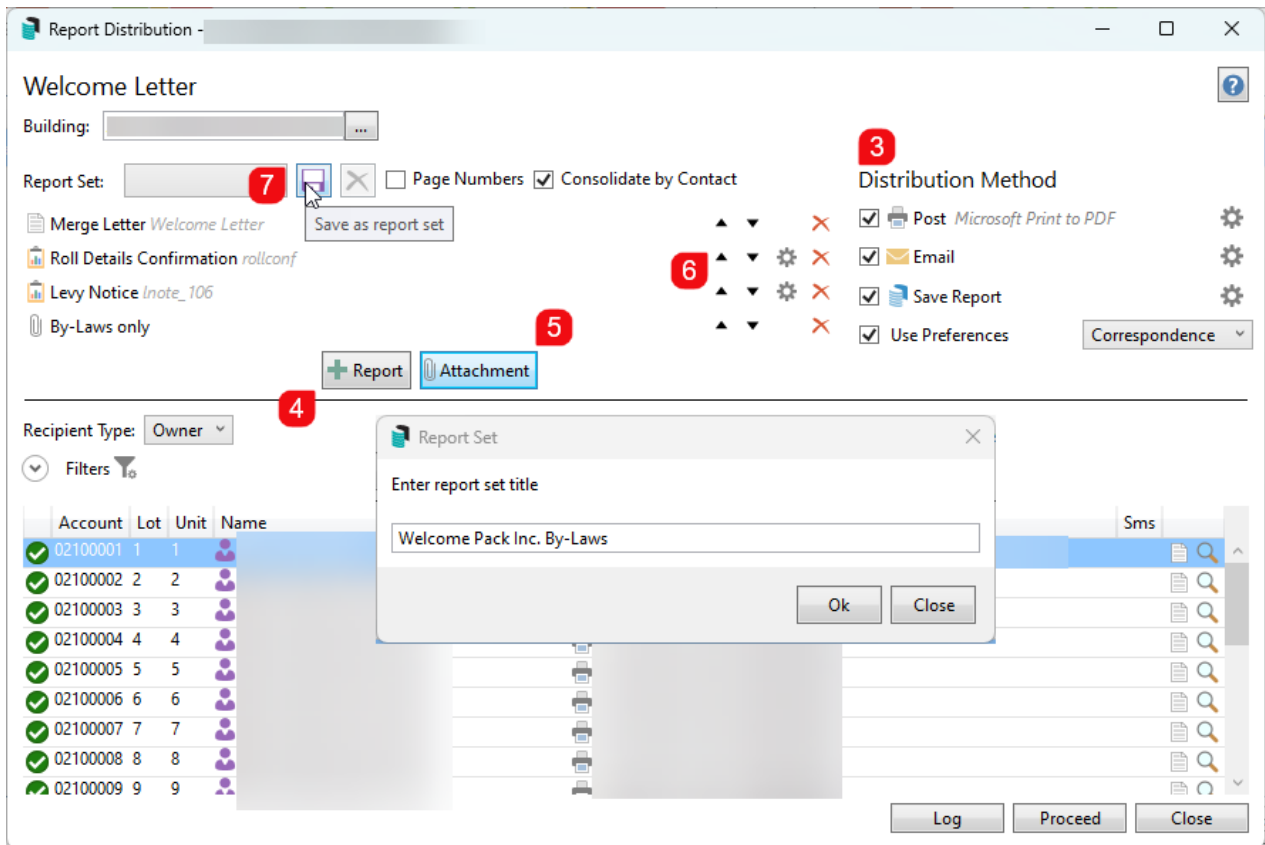
Distribute

Distributing report sets is a structured process that ensures reports are delivered efficiently.

Creating a Lot-Specific Report Set

Creating lot-specific report sets can help produce a sub-set of reports, documents and attachments for regular use. The Distribution method set here will be the default pre-set and should be considered when creating a set. Examples may include Welcome Packs or Nomination Forms.

1. Search or select the appropriate report or **Merge Letters**.
2. The report name will be confirmed in the top right corner. Select the cogwheel to set and check the template and configuration options. When the cogwheel is selected to set each reports configuration, the display next to each report is updated when defaults are changed.
3. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post* (print) *Email* and *Save Report* (DocMax). Set as required from each cogwheel.
4. Click **+ Report** and add merge letters or reports.
5. Click *Attachment* to add an attachment from **DocMax** or **+Add New Folder Location** to add from the network folder.
6. Once all merge letters and reports have been individually selected, use the navigation buttons to apply a sort order to each report / document, if required.
7. Click the *Save* icon and enter the *Report Set* title (30-character limit). Click *OK* to save this to use again.



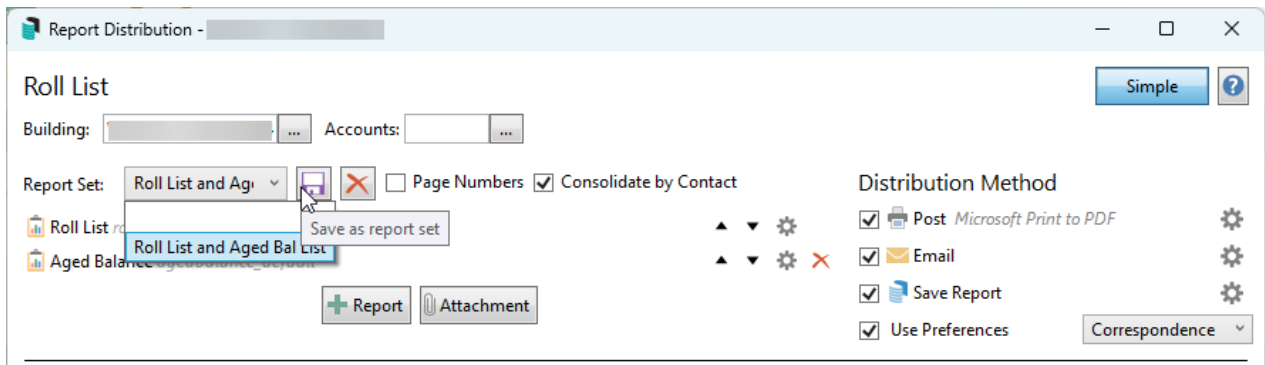
Example of Lot-Specific Report

Lot-specific reports will include the recipient lists to default to the Owners and are designed to report Owner information. Examples may consist of *Roll Details Confirmation*, *Roll Form* and *Update Advice*.

Creating an Internal Report Set

Creating an internal report set can assist with reporting various areas and is a transition of what is available in the *Global Report Sets*. This information can quickly report Bank Reconciliation Reports, Financial Statements, Creditor Balances, Aged Balance Lists and Building Information. Not all reports are available. However, an extensive range of reports can be added to this area.

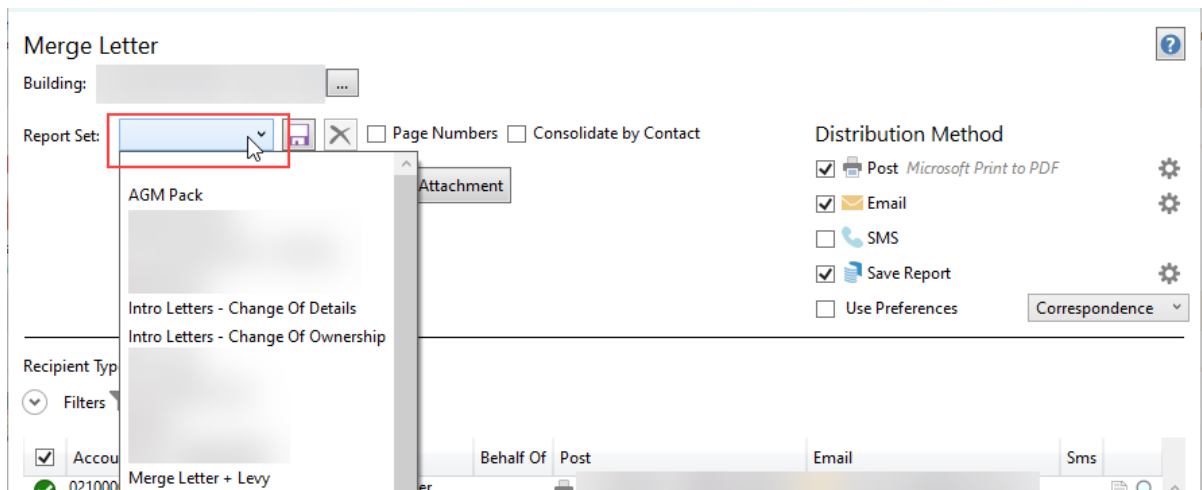
1. Search or select any of the internal reports using the *Report Distribution* screen.
2. Click *+ Report* and select these reports OR Merge Letter to add to the current distribution.
3. If any attachments are required, click *Attachment* and navigate to where the document has been saved in *DocMax* OR *Add New Folder Location*. Click *Select Document* to add this document. Repeat for any further documents.
4. Use the up and down arrows to change the order of documents and reports if there are multiple.
5. Click *Save* and give the Report Set a description (30-character limit). Click *OK*.



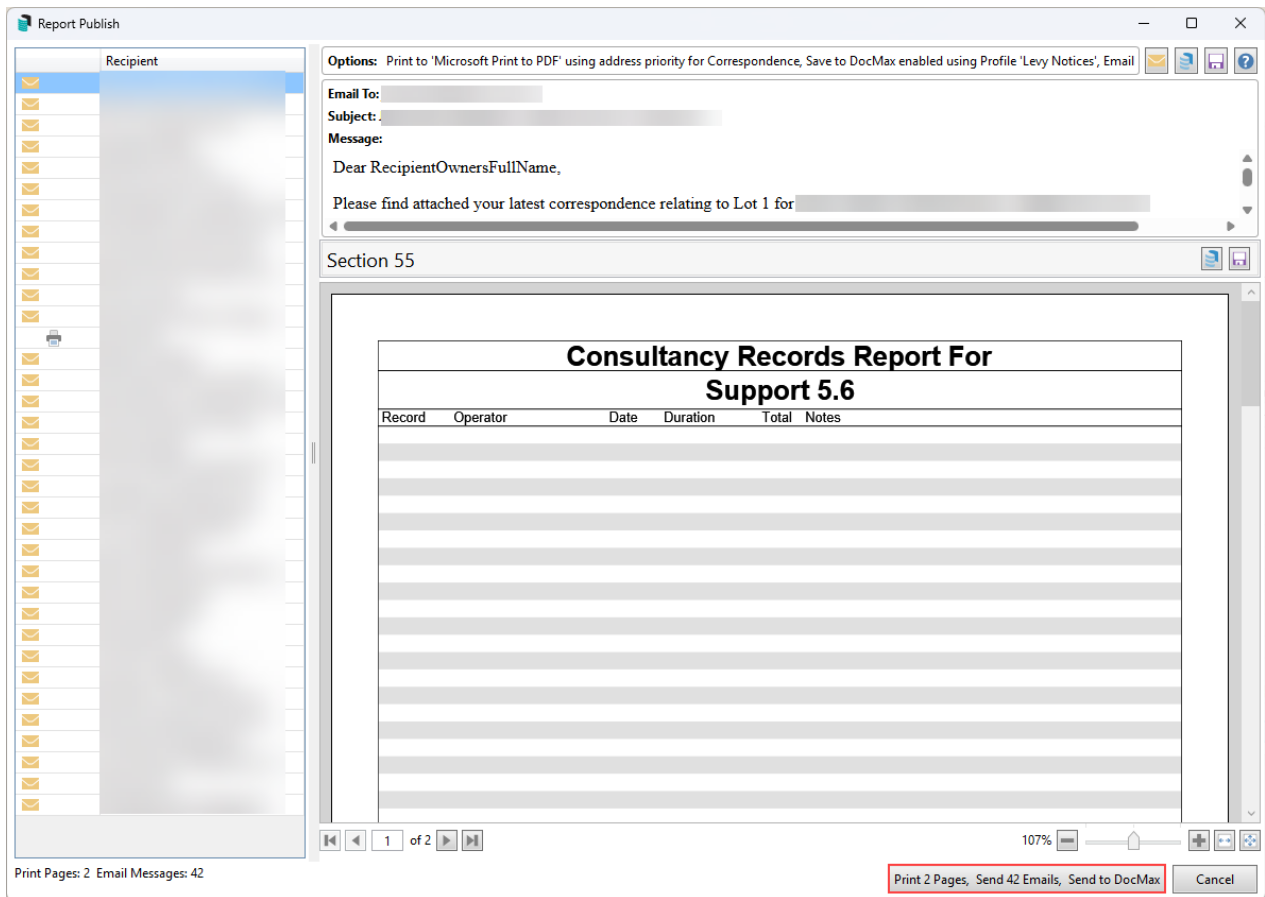
Distributing a Report Set

Any configured Report Set can be distributed to a Lot-Specific contact where required. Each of these areas may include its own Report Set and should be accessed from the menu where it is set.

1. Search or select the appropriate report or **Merge Letters** from Main or Sub-Group.
2. Click 'Cancel' if there is a Report Selection window.
3. From the *Report Set* drop-down box, select the required type.



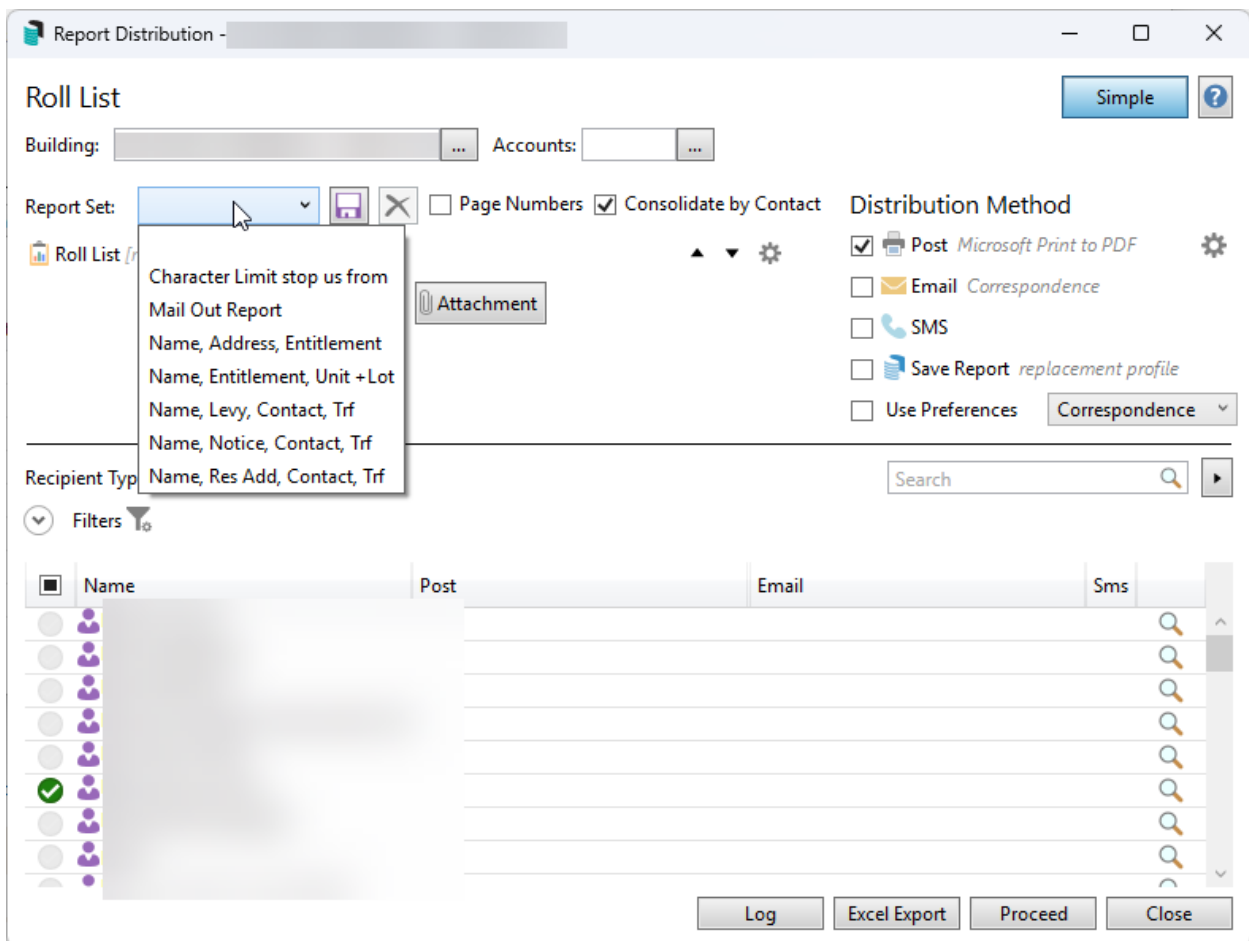
4. If multiple buildings are to be included, tag the required buildings using the *Building* field.
5. If running for a single building and there are multiple contacts with the same contact, *tick Consolidate by Contact* to enable a single delivery based on preferences.
6. Review the *Distribution Method* options and adjust them as needed.
NOTE: Any settings adjusted here will persist through the subsequent distribution process.
7. If there is a single one-off report, click *+Report* to add more reports and merge letters; similarly for *Attachment*. Add as needed.
8. Click *Proceed* to preview the results.
9. From this *Report Publish* window, click *Print X Pages*, *Send X Emails*, *Send to DocMax* button or the *Magnifying Glass* (single-contact selection) icon to finalise the distribution.



Example of Internal Report

Reports designed for internal reporting can assist with quick checks on various StrataMax data. These menus include ***Roll List***, ***Debtors List***, ***Entry Report***, ***Plan Report***, and ***Secondary Debtors List***. They are generally used to check lot and building information, including contact information for these areas. Financial Reporting can also be an example of internal reports, providing detailed insights into financial activities, and help monitor financial health.

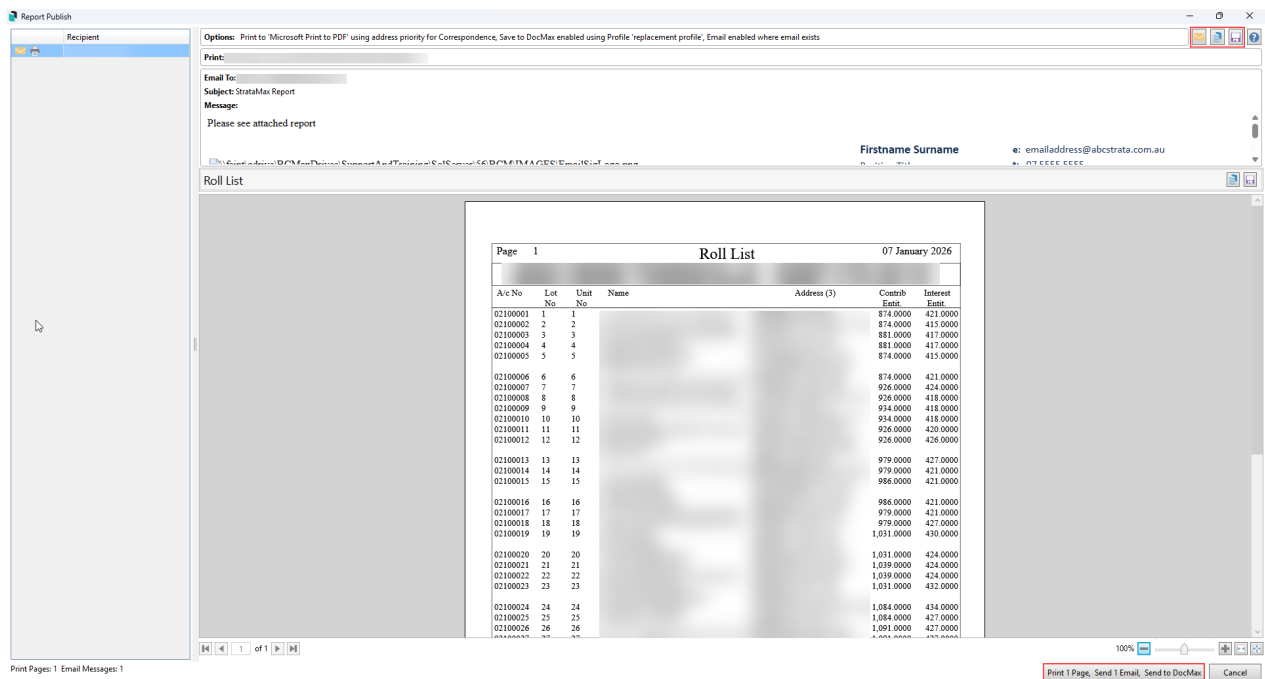
For reports that include multiple templates, for example, the Roll List, it is recommended to save a report set type for each template type.



Producing an Internal Report Set

Internal Report sets can be produced as PDFs and distributed based on the user's internal email settings running the report set.

1. Search or select any of the internal reports using the *Report Distribution* screen.
2. From the *Report Set* drop-down field, select the required Report Set.
3. If page numbers are required against each page for all reports, tick *Page Numbers*.
4. If there is a single one-off report, click *+Report* to add more reports and merge letters; similarly for *Attachment*. Add as needed.
5. Click *Proceed*.
6. From this *Report Publish* window, click *Print X Page*, *Send X Email*, *Send to DocMax* to finalise. The distribution method for the internal user will be applied and highlighted below OR;
7. Click *Save* to save to a network location, or click the *Email* icon to send via email or add to DocMax.



Attachments

Attachments can be created using any report distribution screens, which are particularly effective with Merge Letters. The instructions below refer to how to add a document attachment.

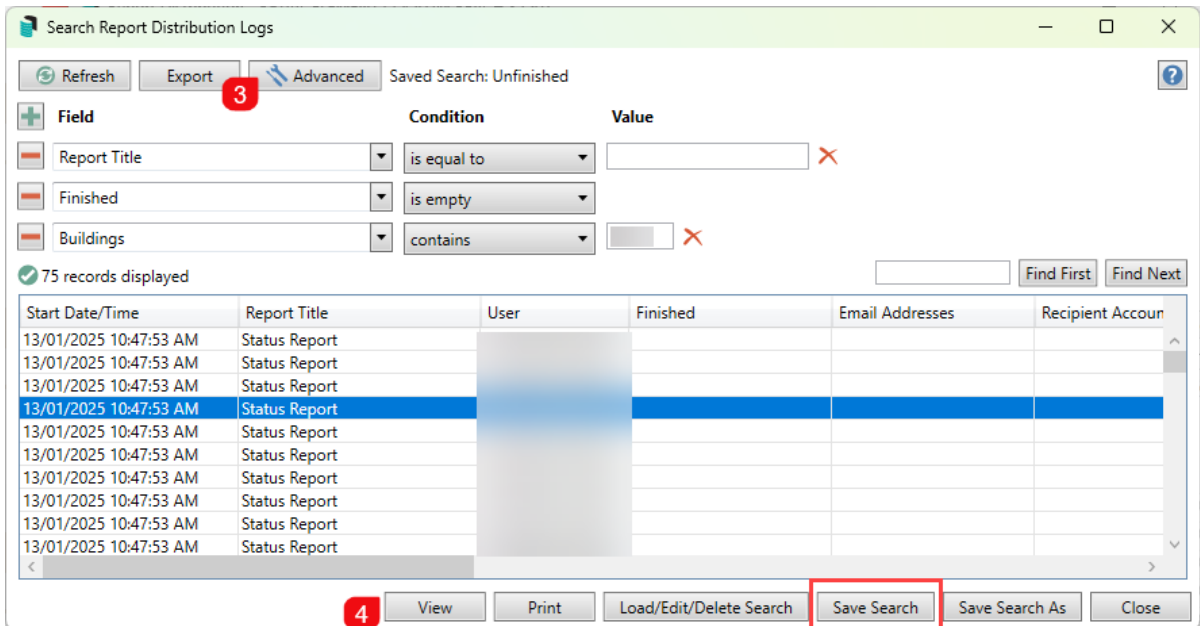
1. Search or select **Merge Letters** from Main or Sub-Group.
2. Click *Cancel* on the Report Selection screen.
3. Use the Building Selector tool for multiple buildings and tag buildings as needed.
4. Check the *Distribution Method* (which will hold settings based on the previous process) for *Post (print) Email* and *Save Report (DocMax)*. Set as required from each cogwheel.
5. Click Attachment.
6. From the *Select Document* window, navigate to where the attachment is located, either in DocMax.
7. Or from the *folder location* if the document has been saved in a network location.
8. Click *Select Document* to attach this document.
9. Repeat for any other document.
10. Click *Proceed*.
11. From this Report Publish window, click *Print X Page, Send X Email, Send to DocMax* to finalise.

Log

The log is a powerful tool for locating previously distributed items. This will include a date and time stamp, as well as the user information. This area can also be used to redistribute any requested information, and will assist in any failed jobs. This area reports all sent items across all menus where Report Distribution is used. If this button is unavailable, verify that the mode is set to *Advanced*.

1. Search or select the appropriate report or **Merge Letters** from Main or Sub-Group (using Report Distribution window)

2. Click *Log*.
3. Refer to the restrictions fields and apply as needed. This can be saved as a search for later use by clicking *Save Search As* and following the screen prompt.
4. Once the distribution has been located, click *View* to see the original reports and documents.



5. Make a selection for *Resume / Repeat All / Repeat Only Print* from the preview window.
 - Resume: Resume the Distribution from where it failed.
 - Repeat All: Start the original Distribution again.
 - Repeat Only Print: Start the Distribution for records set to print only.

Once completed, the distribution will be marked with a Finished date in the log.

NOTE: Emails can be resent from the *Communication* log if needed.

Search Report Distribution Logs

Refresh Export Advanced Saved Search: Unfinished

Report Publish

Options: Print to 'Microsoft XPS Document Writer' using address priority for Correspondence, Save to DocMax e

Status Report

Recipient

Find First Find Next

Recipient Title 2

PO Box 1234, Stratatown QLD 4999
TEL +61 7 1234 5678 | FAX +61 7 1234 5679 | EMAIL info@abcstrata.com.au

ABC Strata

Building Status Report
01/05/24 to 31/05/24

1

Manager 1
Postal Address 1
Postal Address 2
Postal Address 3

Strata Plan No. Strata Manager:
Direct Email: bodycorpmanager@officebearer.com
Phone No: 12345678

Cheques Drawn

Print Pages: 153

1 of 2 86%

Resume Send to DocMax Cancel

Resume
Repeat All
Repeat Only Print

13/01/2025 10:47:53 AM Status Report
13/01/2025 10:47:53 AM Status Report
13/01/2025 10:47:53 AM Status Report
13/01/2025 10:47:53 AM Status Report
13/01/2025 10:47:53 AM Status Report

View Print Load/Edit/Delete Search Save Search Save Search As Close