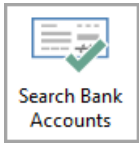


# Search Bank Accounts

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

**Search Bank Accounts** is used to report on bank account information across your StrataMax portfolio, including operating and investment accounts. It displays information entered in **Bank Account Setup** and can also be used to review details such as term deposit maturity dates.

This search can assist with everyday tasks such as reviewing bank account details, reporting on account information across multiple buildings, checking statement history, and identifying accounts that require follow-up. Searches can be saved for ongoing use and the results can be exported to Excel or produced as a PDF-style document.

## Searches

Many [search screens](#) use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

## Search Bank Accounts | Security

To access **Search Bank Accounts**, the user or group must have the permission set to *Allow* for *Search Bank Accounts* under the *Menus* category in **Security Setup**. See [Edit User / Group Permissions](#) for details on how to do this.

## Search Bank Accounts | What it can report on

**Search Bank Accounts** can be used to report on all bank accounts in the portfolio, including operating and investment accounts. This includes the information recorded in **Bank Account Setup** and can also be used to search for term deposit maturity dates.

This makes it useful when reviewing account details across multiple buildings, checking account setup information, or reporting on accounts that require action.

## Recommended Search examples

The following examples provide practical ways to use **Search Bank Accounts** for operating and term deposit accounts.

## Open and review bank account data

1. Search for or select **Search Bank Accounts**.
2. Alternatively, search for or select **Bank Account Setup** and click *All Bank Accounts*.
3. The *Bank Accounts* screen will open with a table of bank accounts in the portfolio.
4. By default, the search excludes records where *Status* is equal to *Removed*.
5. If required, add or remove search fields and click *Refresh* to update the results.
6. If using *Account Code* with the condition *is any of*, multiple account codes can be selected.
7. If required, click *Export* to export the results to Excel.

## Review selected account information

Once a bank account record is selected in the results, additional options are available to review related information.

1. Select the required bank account in the results.
2. Click *Bank Account Setup* to open **Bank Account Setup**. This can be handy to review additional Term Deposit information.
3. Click *Bank Statement* to view the full bank statement history.
4. Click *Statement Info* to view the statement information recorded for the account.

The screenshot shows the 'Bank Accounts' application window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. Below these is a search filter section with columns for 'Restrict', 'Field', 'Condition', and 'Value'. The 'Restrict' column has a '+' icon. The 'Field' column has a dropdown menu. The 'Condition' column has a dropdown menu. The 'Value' column has a dropdown menu. The 'Status' field is set to 'is not equal to' and 'Removed'. The 'Account Code' field is set to 'is any of'. Below the search filters, there is a table with 2991 records displayed. The table has columns for Bank, BSB, Account Number, SCM Reference, Building Number, Building Name, Status, Manual Entry, and Acc. The first two rows are highlighted in blue. Below the table, there are buttons for 'Bank Account Setup', 'Bank Statement', 'Statement Info', and 'Close'. Red circles with numbers 3, 4, 5, 6, and 7 are overlaid on the interface to indicate specific actions or elements.













Bank	BSB	Account Number	SCM Reference	Building Number	Building Name	Status	Manual Entry	Acc
SCM	124-367	23235713	59476	102481	BERESFORD HOUSE HARRIETTE S	Active	No	012
SCM	124-367	23256755	59933	103294	BLAIR ST - 151-153	Active	No	012

**Tip:** **Search Bank Accounts** can be used to review bank account information across all buildings in the portfolio, which can be helpful when reporting on account setup details or maturity dates.

## Term Deposits maturing in the next 30 days where no instruction

## has been provided (Search Bank Accounts)

Restrict To:

 Field	Condition	Value
 Building Number	is equal to	<input type="text"/>  
 Status	is not equal to	Removed  
 Account Code	is not equal to	012 - CASH AT BANK  
 TD Maturity Date	is in the next 30 days	
 TD Renewal Instruction	is empty	

Displayed Columns:

### Displayed Columns

- Bank
- Account Number
- Building Number
- Building Name
- Account Manager
- Bank Account Name
- TD Maturity Date
- TD Interest Rate
- TD Start Date
- TD Renewal Instruction