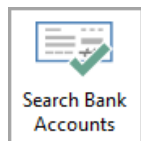


# Search Bank Accounts

Last Modified on 30/07/2025 9:45 am AEST

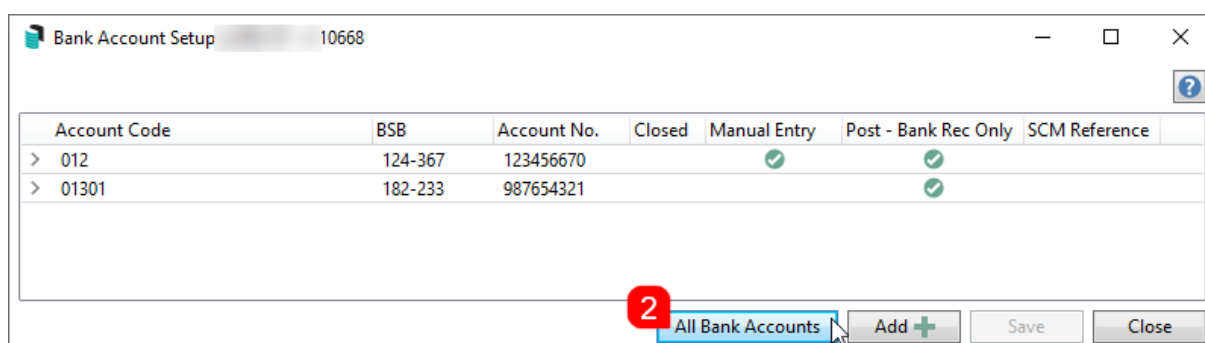


The instructions in this article relate to **Search Bank Accounts**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

Click this icon to display a table with all of the bank accounts (operating and investment) in your StrataMax portfolio, including all information entered in **Bank Account Setup**. There is also the option to search and report on Term Deposit Maturity Dates. Searches can be saved for continuous use, which can then be optionally exported to Excel or produced into a PDF-style document.

This button/icon has a permission in **Security Setup** called 'Search Bank Accounts', the user must have the permission set to 'Allow' under the 'Menus' category in **Security Setup**. See [Edit User / Group Permissions](#) for details on how to do this.

1. Search or select **Bank Account Setup**, and click the *All Bank Accounts* button, or search or select **Search Bank Accounts**.



2. The 'Bank Accounts' screen will open with a table of all bank accounts in your StrataMax portfolio, with the only filter being that the *Status is not equal to Removed*.
3. Add fields/filters by clicking the green *plus* or remove them with the red *minus* button (you have to click the *Refresh* button to view the results when adjusting this area).
  - The 'Account Code, when set with the **Condition** 'is any of', will allow for multiple accounts to be selected for the **Field**. To remove the code selection, click the red cross on the set of codes.
4. Click the *Advanced* button to display additional tabs on the left; *Columns*, *Sort Order*, and *Advanced*.
5. Click the *Export* button to export the current table to an Excel sheet.
6. Select any line item in the table and then click:
  - *Bank Account Setup* to return to the **Bank Account Setup** screen.

- *Bank Statement* to show the full bank statement history.
- *Statement Info* to show all statement information.

The screenshot shows the 'Bank Accounts' window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. Below these is a search filter section with a 'Restrict' button (4), a '+' icon, and a table with columns 'Field', 'Condition', and 'Value'. The table contains four rows: 'Building Number' (is equal to), 'Status' (is not equal to, with 'Removed' selected in the Value dropdown (3)), 'Account Number' (is equal to), and 'Account Code' (is any of). Below the filter section, it says '2991 records displayed'. A table shows columns: Bank, BSB, Account Number, SCM Reference, Building Number, Building Name, Status, Manual Entry, and Acc. Two rows are visible, with the second row highlighted. At the bottom, there are buttons for 'Bank Account Setup', 'Bank Statement', 'Statement Info', and 'Close'. A red box highlights these bottom buttons, with a callout 7 pointing to the 'Statement Info' button.

7. Click *Close* to close the window.

## Search Bank Accounts | 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. There is also a tool to assist with quick-finding fields of text information. Use the top right corner and enter text into this field to search. Click *Find First* or *Find Next* to locate results.

'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.

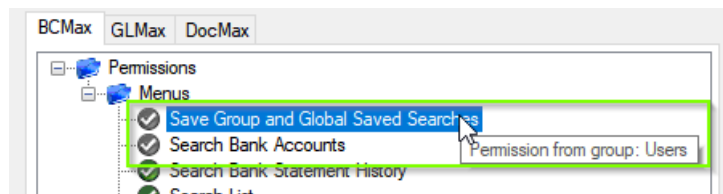
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

If a Saved Search is loaded/opened this will be noted at the top of the search screen.

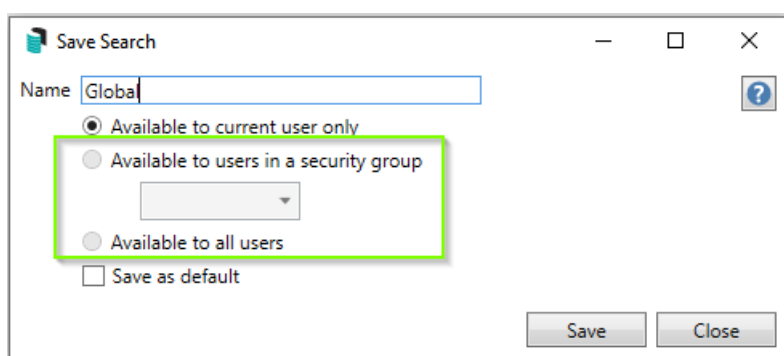
The screenshot shows the 'Work Orders' window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. To the right of these buttons, a red box highlights the text 'Saved Search: Outstanding Work Orders'. Below this is a search filter section with a '+' icon and a table with columns 'Field', 'Condition', and 'Value'. The table contains three rows: 'Current Building', 'Status' (is not equal to, with 'E-Finalised' selected in the Value dropdown), and 'Deleted' (is equal to, with radio buttons for 'Yes' and 'No' selected).

## 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.

When a Saved Search is loaded/opened, the Saved Search name will be noted at the top of the search screen.

## Saved Searches | Edit a Saved Search

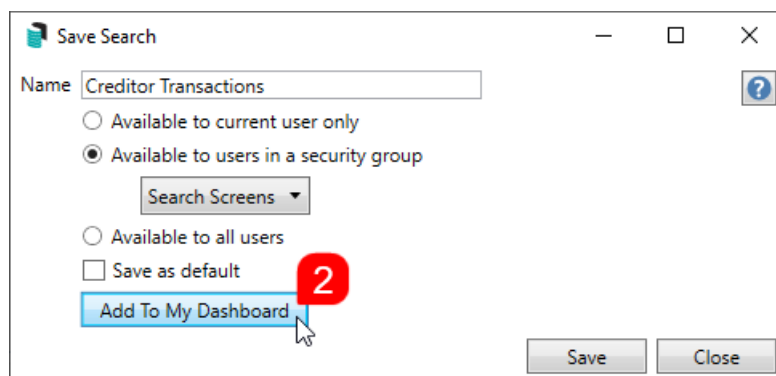
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required 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.

## Saved Searches | Add To My Dashboard

There is the option to add certain searches to your own *Dashboard*. This is limited to your own *Dashboard* only (you cannot add it to the *Dashboard* of another user or group), and only available in these specific 'Search' screens:

- *Search Office Bearers*
- *Search Bank Accounts*
- *Search Creditor Invoice Items*
- *Search Work Orders*
- *Search Quotes*
- *Search Building*
- *Search Inspections*
- *Search Levies*
- *Management Fees Report*

1. Follow the steps to set up a new Saved Search, or edit a Saved Search (see the two relevant sections above).
2. In the 'Save Search' window, click the *Add To My Dashboard* button.



3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See [Display Types](#) for more information.
7. Tick *Show On Desktop* if preferred.
8. Depending on which *Display Type* was chosen, the fields for the different number values will change. Observe the *Preview* to assist with picking the right number values suited to the *Display Type*.
9. Click the *Save* button.
10. Back in the 'Save Search' screen, there are now buttons to *Edit Dashboard* and *Delete Dashboard*.
11. Click the *Close* buttons on any remaining screens.

## Export and Print

Each search can be exported to Excel or produced as a PDF-style report, and the column display for these reports will be included.

- *Export* - If there are more than 1000 results, Check the *Advanced* tab / Advanced area to report the maximum. Click Export for an Excel report.
- *Print* - Check the cogwheel from the Report Distribution screen to change fonts and set the letterhead style. This print style will produce the report based on the column width. Click Print for a PDF-style report.

Refresh Export Advanced Saved Search: Creditor Transactions

Field Condition Value

Current Building is equal to Yes No

On Hold is equal to

Contractor Industry is equal to

218 records displayed

Building	Building Name	Reference	Paid Date	Paid	On Hold	Invoice Date	Invoice Amount	Invoice Number	Contractor Industry	Creditor Code	Creditor Name	Expense Code	Expense
		D0000164	30/07/2024	✓	<input type="checkbox"/>	30/07/2024	39.86			08200002		15020	MANAGE
		D0000163	30/07/2024	✓	<input type="checkbox"/>	30/07/2024	66.00			08200002		14605	LEGAL &
		D0000162	26/07/2024	✓	<input type="checkbox"/>	18/07/2024	2,654.65	3877987		08200192		14315	INSURAN
		D0000161	26/07/2024	✓	<input type="checkbox"/>	18/07/2024	32,548.66	3877987		08200192		14310	INSURAN
		D0000160	30/07/2024	✓	<input type="checkbox"/>	11/07/2024	176.00	12055	Accountant	08200202		12510	AUDITOR
		D0000159	30/07/2024	✓	<input type="checkbox"/>	22/07/2024	957.00	148		08200663		24610	LEGAL SE
		D0000158	05/08/2024	✓	<input type="checkbox"/>	19/07/2024	5,247.00	1003	Gardener	08200683		13905	GARDEN
		D0000157	05/08/2024	✓	<input type="checkbox"/>	19/07/2024	1,606.00	1004	Gardener	08200683		14455	IRRIGATI
		D0000156	24/07/2024	✓	<input type="checkbox"/>	17/07/2024	148.30	1636	Handyman	08200541		13950	GENERAL

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

## Examples of Searches for Dashboard

The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes and your particular setup of Restrict To, Display Columns and Sort Order may vary to suit your requirements.

### Last AGM where minutes have not been sent (Search Buildings)

Restrict To:

Field	Condition	Value
Building Name	starts with	
AGM Last Meeting Date/Time	is on or before	<input type="checkbox"/> Specific Dates 2 weeks in the past
AGM Last Meeting Minutes Sent	is empty	

Displayed Columns:

#### Displayed Columns

Building Number  
Building Name  
Account Manager  
AGM Last Meeting Date/Time  
AGM Last Meeting Minutes Sent

### Assigned Team Members (Search Buildings)

Restrict To: No requirements however you may filter by Account Manager for example













Displayed Columns:

#### Displayed Columns

Building Number  
Building Name  
Account Manager  
Account Manager Assistant Name  
Strata Finance Manager Name  
Asset Manager Name

### Term Deposits maturing in 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

### Creditor Invoices Awaiting Invoice Hub Approval & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

 Field	Condition	Value
 Invoice Hub Status	is equal to	Uploaded  
 Invoice Date	is on or before	<input type="checkbox"/> Specific Dates <input type="text" value="1 Month in the past"/> 



Displayed Columns:

#### Displayed Columns

Building Number  
Building Name  
Reference  
Invoice Date  
Invoice Amount  
Invoice Number  
Invoice Hub Status  
Creditor Code  
Creditor Name  
Expense Code  
Expense Name

### Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

Field	Condition	Value
 Invoice Date	is on or after	<input type="checkbox"/> Specific Dates 1 Month in the past
 On Hold	is equal to	<input checked="" type="radio"/> Yes <input type="radio"/> No




Displayed Columns:

#### Displayed Columns

Building Number  
Building Name  
Reference  
Invoice Date  
Invoice Amount  
Invoice Number  
On Hold  
Invoice Hub Status  
Creditor Code  
Creditor Name  
Expense Code

### Inspections due in next 30 days (Search Inspections)

Restrict To: setting the category to specific values allows dashboards specific to inspection types.

Field	Condition	Value
 Category	is equal to	Sinking Fund Forecast 
 Next Due	is in the next 30 days	

Displayed Columns:

#### Displayed Columns

Building Number  
Building Name  
Category  
Period  
Next Due  
Last Due  
Inspected By Code  
Inspected By Name  
Result  
Result Rating

## Identify Creditors with no Compliance Code that have had recent activity

Restrict To:

 Field	Condition	Value
 Compliance Short Name	is empty	
 Last Activity	is in the last 7 days	

Displayed Columns:

#### Displayed Columns

Building Name  
Building Number  
Creditor Code  
Creditor Name  
Balance  
On Hold Total  
Compliance Short Name  
Compliance Long Name