Search Quotes

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

Search Quotes can be used to find specific statuses, for example, outstanding quotes. Another example, searching by 'Contractor Industry' (if populated from *Creditor Maintenance*) which can be used to analyse data and exported. Using these areas will also assist in keeping the Dashboard for outstanding Quotes current.

Searches can be saved for continuous use, which can then be optionally exported to Excel or produced into a PDF-style document.

Search Quotes | Security

To access the **Search Quotes**, the user must have permission set to 'Allow' for **Search Quotes** under the 'Menus' category in **Security Setup.**

Search Quotes

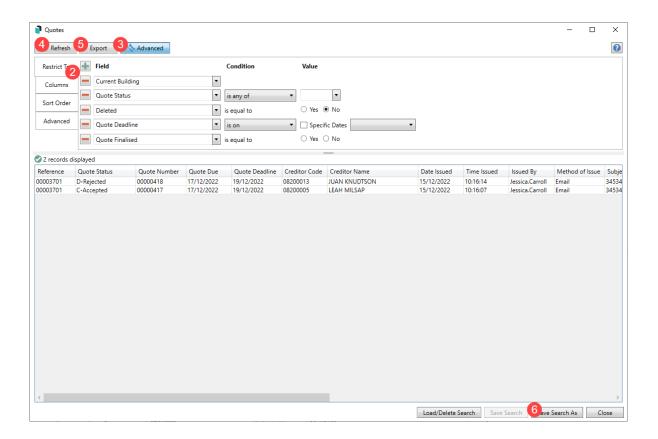
Using *Search Quotes* offers a search window that can be tailored to include relevant TaskMax fields of restriction, such as *Quote Deadline* date being within the last seven days to track what quotes have not been received. Another example includes using the *Quote Finalised* field to determine if quotes are finalised.

The columns and sort order displays can also be helpful to include relevant information for the scenario required. These can also be saved for a Saved Search, which will allow this to be used at a later time and can be made available for a User or Group.

To select multiple fields in the 'Columns' display area, click the first field, hold Crtl, and select the following field. This will select both fields and allow these to be moved up or down simultaneously.

- 1. Search or select Search Quotes.
- 2. Referring to the restriction fields, the *Current Building* will be a default of restriction. Click + to add further fields of restriction. Click the to remove any fields of restriction.
- 3. Refer to the Advanced area and apply any Columns and Sort Order preferences.

- 4. Click Refresh to view the results.
- 5. Click Export if this information should be available in Excel.
- 6. Click Save Seach As to save this saved search for later use.



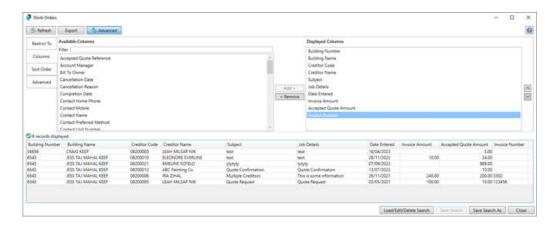
- 7. Enter a Name for the saved search.
- 8. Select who should have access to this saved search. If assigned to the group, only the groups you are a member of are available.
- 9. Click Save as default if this should be the default view when opening the Search Quotes window.
- 10. Click Save.

Each column can be clicked on to adjust the sort order.

Quote Amount vs Invoice Amount

Use *Search Work Orders* to compare quoted amount v invoice amount.

Recommend restrict Status to Finalised so only work orders finalised appear and Quote amount is not blank so any work orders without quotes are excluded.



The recording of Quote Requests and Issuing of Work Orders can help maintain a clear audit trail of maintenance work orders & enable comparison of quoted amounts vs actual invoice amounts. Work Orders should be finalised when Invoices are entered via Creditor Commitments.

Quote Requests can be submitted to a number of Creditors and quote details recorded in TaskMax.

Once a quote is accepted TaskMax will record the quoted amount within the Work Order and this amount cannot be edited.

If details of a Work Order including a quoted amount vary from the original agreed terms; the Work Order must be cancelled and a new Work Order created which ensures the audit trail remains.

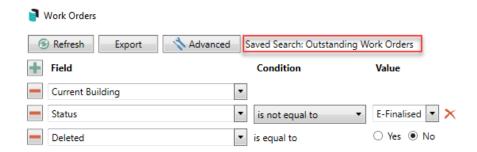
Search Quotes | Saved Searches

'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.

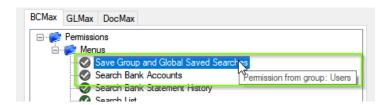
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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



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 groupwill 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.

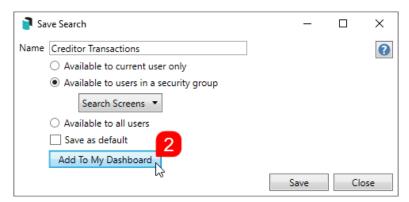
Saved Searches | Edit a Saved Search

- 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.

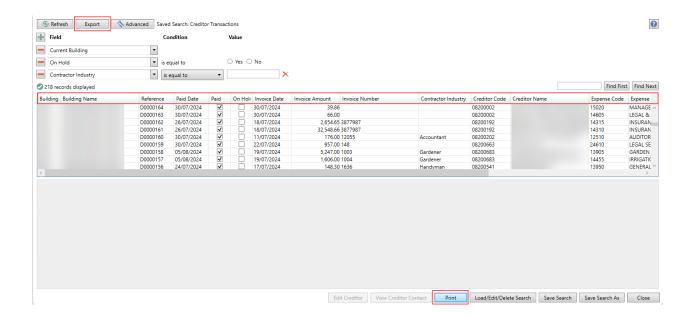
Export and Print

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.

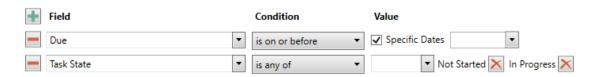


Examples of Searches for Dashboard

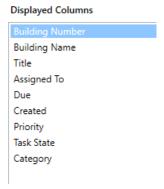
The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes, and your particular setup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

All Overdue Tasks (Search Tasks)

Restrict To:

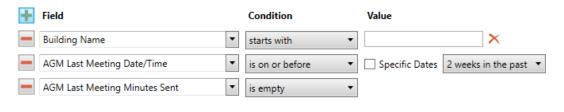


Displayed Columns:

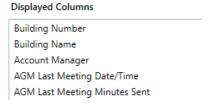


Last AGM where minutes have not been sent (Search Buildings)

Restrict To:



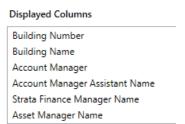
Displayed Columns:



Assigned Team Members (Search Buildings)

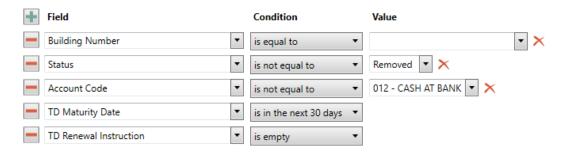
Restrict To: No requirements, however you may filter by Account Manager for example.

Displayed Columns:

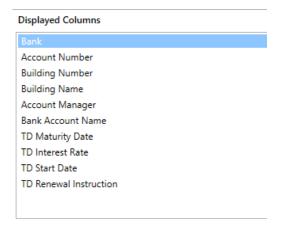


Term Deposits maturing in next 30 days where no instruction has been provided (Search Bank Accounts)

Restrict To:

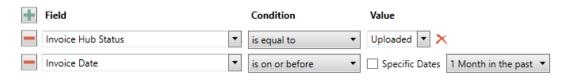


Displayed Columns:



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

Restrict To:

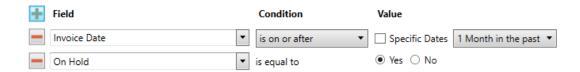


Displayed Columns:



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

Restrict To:

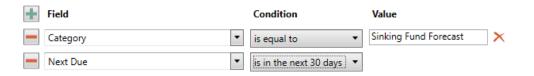


Displayed Columns:



Inspections due in next 30 days (Search Inspections)

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



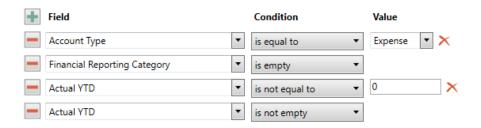
Displayed Columns:



Identify expense account codes without a category (Search Global Accounts)

Useful for ensuring the NSW State of Key Financial Information is accurate; this relies on account codes having a category set in Account Maintenance.

Restrict To:



Displayed Columns:

Displayed Columns

Building Number Building Name Account Code Description Financial Reporting Category