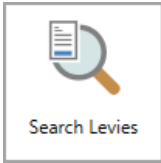


# Search Levies

Last Modified on 15/10/2024 5:11 pm AEST



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

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

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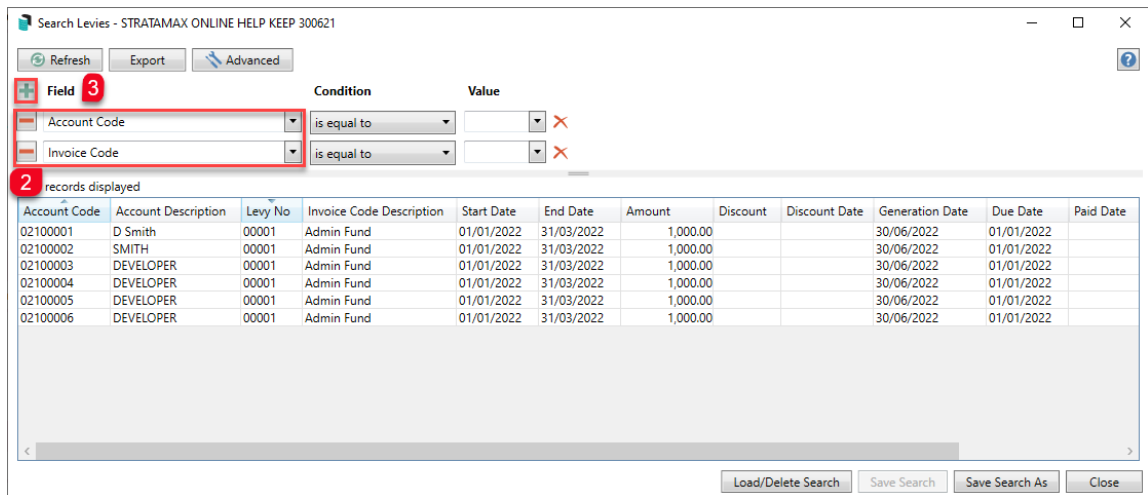
## Search Levies | Security

To access **Search Levies** screen, the user must have the permission set to 'Allow' for 'Search Levies' under the 'Menus' category in [Security Setup](#).

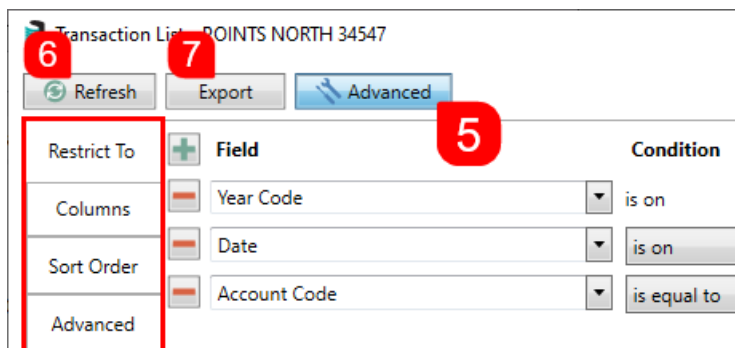
## Search Levies

Search Levies has been designed for users to search and report on levy information for a property. This search returns levy data based on set values and the default is Account Code and Invoice Code fields with the ability to include other fields; each column can be clicked on to sort and results can be exported to Excel or produced into a PDF-style document.

1. Search or select **Search Levies**.
2. By default, the fields 'Account Code' and 'Invoice Code' will be applied.
  - By removing (click the red 'minus' button) or changing the 'Invoice Code' field to a different field, it will display invoice/levy items across the building.
  - The 'Account Code' field is used to select a specific account code if you have a requirement to report on a specific lot account code.
  -



- To add another field, click the green plus button, then select the **Field** by clicking the drop-down menu.
- Based on the selected **Field**, the **Condition** can be changed if required, and then you can change/select the required **Value**.
- Click the *Advanced* button to display additional tabs down the left side:
  - Columns* to add, remove, or change the order of the columns.
  - Sort Order* to change how the data in the table is sorted (by column, A-Z, etc.)
  - Advanced* to change the maximum number of records to display in the table (10000, 1000, etc.).
- Click the *Refresh* button to search for the records.
- If you would like to, you can export the data to an Excel sheet, by clicking the *Export* button.



## Search Levies | 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.

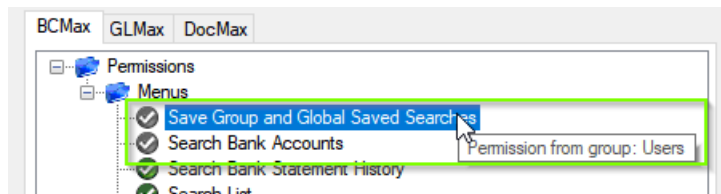
Work Orders

Refresh Export Advanced Saved Search: Outstanding Work Orders

Field	Condition	Value
Current Building		
Status	is not equal to	E-Finalised
Deleted	is equal to	<input type="radio"/> Yes <input checked="" type="radio"/> No

## 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.

Save Search

Name: Global

Available to current user only

Available to users in a security group

Available to all users

Save as default

Save Close

## 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

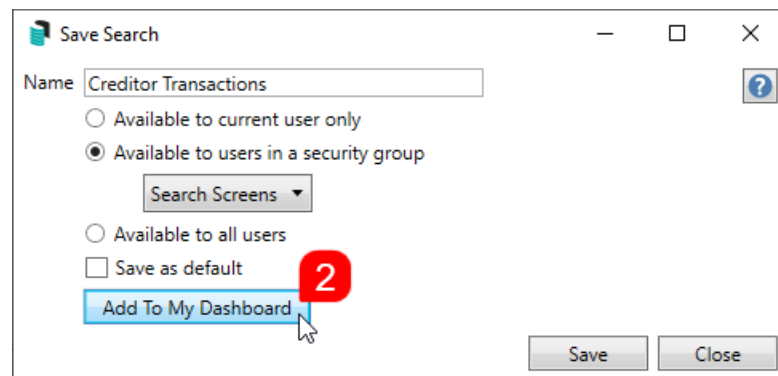
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required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

On Hold is equal to  Yes  No

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 checked="" type="checkbox"/>	<input type="checkbox"/>	30/07/2024	39.86			08200002		15020	MANAGE
		D0000163	30/07/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	30/07/2024	66.00			08200002		14605	LEGAL &
		D0000162	26/07/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	18/07/2024	2,654.65	3877987		08200192		14315	INSURAN
		D0000161	26/07/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	18/07/2024	32,548.66	3877987		08200192		14310	INSURAN
		D0000160	30/07/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11/07/2024	176.00	12055	Accountant	08200202		12510	AUDITOR
		D0000159	30/07/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	22/07/2024	957.00	148		08200663		24610	LEGAL SE
		D0000158	05/08/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	19/07/2024	5,247.00	1003	Gardener	08200683		13905	GARDEN
		D0000157	05/08/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	19/07/2024	1,606.00	1004	Gardener	08200683		14455	IRRIGATI
		D0000156	24/07/2024	<input checked="" type="checkbox"/>	<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	<input type="text"/>
AGM Last Meeting Date/Time	is on or before	<input type="checkbox"/> Specific Dates <input type="text" value="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 checked="" type="checkbox"/> 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
<input type="checkbox"/> Invoice Date	is on or after	<input type="checkbox"/> Specific Dates 1 Month in the past
<input type="checkbox"/> 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
<input type="checkbox"/> Category	is equal to	Sinking Fund Forecast <input type="checkbox"/>
<input type="checkbox"/> 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:

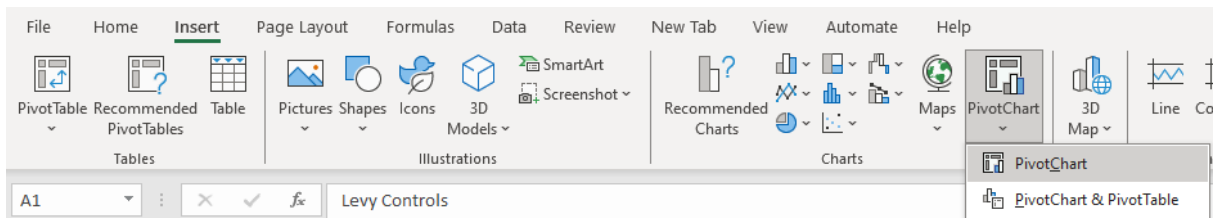
#### Displayed Columns

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

## Search Levies | Excel Charts

Search functions were designed to provide quick access to data that can easily be exported to excel based on your requirements. Once data is in excel tools such as Create Pivot Table and Create Pivot Charts are a great way to display data in different ways that can assist owners & committee in interpreting data.

1. Use the steps above to get the required data from Search Levies (for the below chart the Due Date, Invoice Code Description and Amount fields are required). If there are more than 1000 records, remember to change the maximum number of records to retrieve to unlimited.
2. Click on Export
3. In Excel select the Insert tab and select Pivot Chart / Pivot Chart; all data should automatically be selected and click OK



4. From the PivotChart Fields section on the right drag the relevant fields to the required area

1. Invoice Code Description to the Legend (Series) area
2. Amount to the Values area
3. Due Date to the Axis (Categories) area

Once the above steps are completed the chart will look similar to below. Pivot Charts can be customized in many ways; some handy tips include

- To change the chart type to line graph or another type of chart for instance; right click on the chart and select Change Chart Type
- To display the amounts as \$; right click on 'Sum of Amount' at top left of chart and select Value Field Settings and click on Number Format and then select Currency and OK
- To customize the chart coloring etc, right click on the chart and select Format Plot Area and make changes as required
- To remove particular Levy Codes, click on the Invoice Code Description legend on the chart and edit the filter as required

