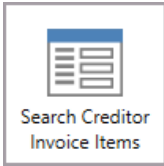


Search Creditor Invoice Items

Last Modified on 29/05/2024 3:12 pm AEST



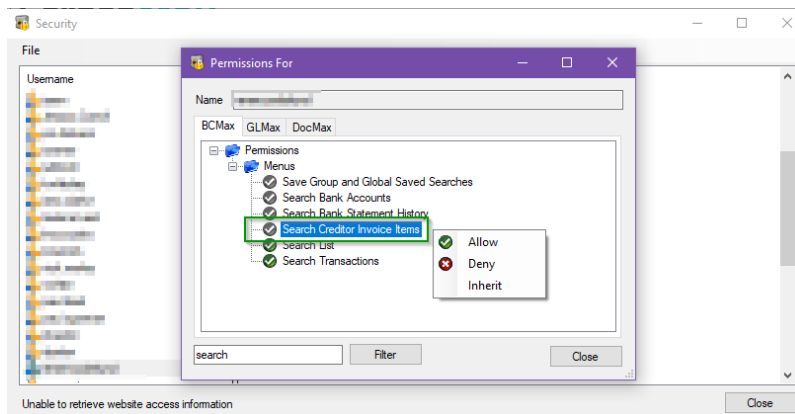
The instructions in this article relate to **Search Creditor Invoice Items**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Creditor Invoice Items can be used to review any warnings or balance issues as well as find a specific invoice and mark the Creditor Invoice On Hold or to Tag Paid Invoices. Searches can also be completed and data can be extracted into a report used for analysis. An example of using the data to analyse expenses by Contractor Industry is at the bottom of this page.

This menu can be used by team members that are responsible for moving invoices from *Ok to Pay* to *On Hold* between payment runs.

Search Creditor Invoice Items | Security

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



Search Creditor Invoice Items

Search Creditor Invoice Items can be used to search Creditor Invoices that have been created based on set values; each column can be clicked on to sort and results can be exported to Excel. Regularly used searches can be saved, such as 'All Invoices On Hold' and 'All Unpaid Invoices'. **Search Creditor Invoice Items** will search individual Creditor Invoices rather than Creditor accounts. **Search Creditor Invoice Items** will show Paid Date, Paid, on Hold status for each individual Creditor entered against a building.

1. Search or select **Search Creditor Invoice Items**.

2. Adjust search criteria as needed to locate invoices.
 - The 'Invoice Date' field is used to select a specific date or date range, including an old or historic year. Or by removing (click the red 'minus' button) or changing the 'Invoice Date' field to a different field, it will display the full history of transactions.
3. To add another field, click the green plus button, then select the **Field** by clicking the drop-down menu.
4. Based on the selected **Field**, the **Condition** can be changed if required, and then you can change/select the required **Value**.
5. 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.).
6. Click the *Refresh* button to search for the records.
7. If you would like to, you can export the data to an Excel sheet, by clicking the *Export* button.

Search Creditor Invoice Items - Renee Building KEEP 5656

Refresh Export Advanced Saved Search: All Unpaid Invoices

Field Condition Value

Invoice Date is on or after Specific Dates

Account Manager is equal to

First 1000 records displayed

Invoice Number	Creditor Code	Creditor Name	Expense Code	Expense Name	BPAY CRN	Details	Paid Date	Paid	On Hold	Account Manager
.00 34545e7f	08200001	SUNDRY CREDITORS	13405	ELECTRICAL REPAIRS		Electrical Repairs	28/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00 45346	08200005	BYO MOWING	13615	FIRE PRTCN-REPAIRS & SERVICIN		Test		<input type="checkbox"/>	<input type="checkbox"/>	
.00	08200003	AUSTRALIAN TAXATION OFFICE	12505	AUDITORS - AUDIT SERVICES		ATO Credit	16/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00 346568	08200019	ALINTA ENERGY	12105	ACCOUNTING	12345	Accounting	28/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00 6564	08200019	ALINTA ENERGY	13605	FIRE PROTECTION CONTRACT	12345	Test		<input type="checkbox"/>	<input type="checkbox"/>	
.00 345457	08201000	ABC Strata	13615	FIRE PRTCN-REPAIRS & SERVICIN		Fire PrtcN-Repairs &		<input type="checkbox"/>	<input type="checkbox"/>	
.00 346457	08200005	BYO MOWING	13905	GARDEN & GROUNDS		Garden & Grounds	19/01/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00 2356	08200019	ALINTA ENERGY	14310	INSURANCE - PREMIUM		Insurance - Premium	14/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00 vv45457	08200015	ADLER'S POOL CENTRE	13105	CLEANING		Cleaning		<input type="checkbox"/>	<input type="checkbox"/>	
.00 235346457	08200016	ADVANCED BUILDING QLD PTY LT	13620	FIRE EVACUATION PLAN		Fire Evacuation Plan	19/01/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00 3579ijk	08200016	ADVANCED BUILDING QLD PTY LT	13105	CLEANING		Cleaning		<input type="checkbox"/>	<input type="checkbox"/>	
.00 23288	08200904	ACCURATE JPST MANAGEMENT	15860	PEST CONTROL SERVICES		Pest Cntrl Common Ar	27/08/2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00	08200006	1300 PEST CONTROL	12115	ACCOUNTANT - TAX RETURNS		Last Year Entry		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.50 339	08200002	PEAK BODY CORPORATE MGMT	12115	ACCOUNTANT - TAX RETURNS		2021 Tax Returns	03/09/2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.00	08200002	PEAK BODY CORPORATE MGMT	12115	ACCOUNTANT - TAX RETURNS		Reverse	19/01/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
.22 113 002 204 449	08200875	ORIGIN ELEC 130112	17005	UTILITIES - ELECTRICITY	400000900821	Elec 19.6.21-16.9.21	23/09/2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Each column can be clicked on to sort the order of records.

Search Creditor Invoice Items | Place Creditor Invoice On Hold

To place an invoice on hold or take off hold locate the invoice in **Search Creditor Invoices Items** and then mark as *Hold* or untick Hold to remove invoice from Hold.

1. Search or select **Search Creditor Invoice Items**.
2. Use Fields to locate required invoice.
3. Click on the Creditor Invoice record to list any Creditor Invoices for the Creditor Account in the lower half of the screen. Click '*Hold*' to add the tick so that the *Creditor Invoice* is added to *Hold* and excluded from any payment process.

Search Creditor Invoice Items - STRATAMAX ONLINE HELP - KEEP 2024

Refresh Export Advanced Saved Search: All On Hold Invoices

Field Condition Value

Invoice Date is on or after Specific Dates

Creditor Name contains

13 records displayed

Reference	Invoice Date	Invoice Amount	Invoice Number	Creditor Code	Creditor Name	Expense Code	Expense Name	Details
D0000002	08/01/2024	10.00	651	08200020	ALLIANCE PLUMBING	13905	GARDEN & GROUNDS	Garden & Grounds
D0000001	01/01/2024	10.00	Inv Number	08200020	ALLIANCE PLUMBING	13615	FIRE PRCTN-REPAIRS & SERVICIN	Details
D0000007	04/01/2024	450.00		08200007	AAARUBBISH	12900	BUILDING REPAIRS	Building Repairs
D0000006	04/01/2024	259.00	1454545212	08200009	ABLE TREE SERVICES	13010	CARETAKER	Hedging
D0000004	01/12/2023	100.00		08200003	AUSTRALIAN TAXATION OFFICE	12105	ACCOUNTING	Testing
D0000003	10/12/2023	575.00	3334	08200124	GLASS NOW	12900	BUILDING REPAIRS	Front Window
D0000002	10/12/2023	200.00	1447	08200007	AAARUBBISH	13905	GARDEN & GROUNDS	November 23
D0000001	01/12/2023	150.00	45447878	08200006	A CLEAN SCENE	13105	CLEANING	Foyer Cleaning
D0000005	30/11/2023	1,500.00	454654	08200009	ABLE TREE SERVICES	13905	GARDEN & GROUNDS	Tree Trimming
D0000004	01/11/2023	330.00	454654	08200009	ABLE TREE SERVICES	13905	GARDEN & GROUNDS	Tree Trimming
D0000003	01/10/2023	-150.00	5454	08200009	ABLE TREE SERVICES	13905	GARDEN & GROUNDS	Garden & Grounds
D0000002	01/10/2023	250.00	5454	08200009	ABLE TREE SERVICES	13905	GARDEN & GROUNDS	Hedging
D0000001	01/10/2023	100.00	123152	08200007	AAARUBBISH	12105	ACCOUNTING	Rubbish Sept

123456 LANAS LUXURY RESORT KEEP Total: 259.00 Outstanding: 259.00 EFT

08200009 ABLE TREE SERVICES

Invoice Number	Date	Work Order	Hub	BPAY CRN	Reference	Description	Expense Account	Amount	Paid Amount	Hold
1454545212	04/01/2024				D0000006	Hedging	13010 CARETAKER	259.00	0.00	<input type="checkbox"/>

Tag Paid Invoices Hold All Unhold All

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

Search Creditor Invoice Items | Move Creditor Invoice off Hold / OK to Pay

Creditor Invoices can be removed from *Hold* and made available for payment with a single button click from **Search Creditor Invoice Items**.

1. Search or select **Search Creditor Invoice Items**.
2. Locate the Creditor Invoice record by adjusting the Fields as required.
3. Click *Refresh* if changes to Fields are made.

Tip: Create a Saved Search for On Hold Creditors.

4. Click on the Creditor Invoice record to list any Creditor Invoices for the Creditor Account in the lower half of the screen. Click '*Hold*' to remove the tick so that the *Creditor Invoice* is removed from *Hold* ready for the payment process.
 - If you need all Creditor Invoices for this particular Creditor Account in the building to be on Hold or off Hold, click on the '*Hold All*' and *UnHold All*' to collectively set the status.
 - If the Building is configured for Invoice Hub approval the *On Hold* will not be able to be adjusted until the Invoice has been approved via the Invoice Hub. Refer to the Hub field.

Search Creditor Invoice Items - KEEP 9314

Refresh Export Advanced

Field Condition Value

Current Building

Invoice Date is on or after Specific Dates

22 records displayed

Creditor Code	Creditor Name	Expense Code	Expense Name	Details	Paid Date	Paid	On Hold	Building Number	Building Name
08200233	SILVIOS ELECTRICAL PTY LTD	13630	FIRE ANNUAL AUDIT & INSPECTI	Renee Test TASK 1		<input type="checkbox"/>	<input type="checkbox"/>	9314	
08200017	AGJ PEST MANAGEMENT PTY LTD	13905	GARDEN & GROUNDS	Renee TEST CRED INV2	27/02/2024	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9314	
08200016	ADVANCED BUILDING QLD PTY LTD	12900	BUILDING REPAIRS	Renee Test Cred INV		<input type="checkbox"/>	<input checked="" type="checkbox"/>	9314	
08200188	PANE FULLY CLEAR WINDOWS	13905	GARDEN & GROUNDS	Renee Test 3	19/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9314	
08200188	PANE FULLY CLEAR WINDOWS	12900	BUILDING REPAIRS	Renee Test 2	19/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9314	
08200188	PANE FULLY CLEAR WINDOWS	13620	FIRE EVACUATION PLAN	Renee Test 1	19/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9314	
08200134	GUTTER KNIGHT	13630	FIRE ANNUAL AUDIT & INSPECTI	Fire Annual Audit &	19/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9314	
08200022	ALLIANCE PLUMBING	12105	ACCOUNTING	Accounting	16/02/2024	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9314	
08201002	Renee Test Creditor	13405	ELECTRICAL REPAIRS	Electrical Repairs	14/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9314	
08201001	Renee Creditor	14805	LIFT MAINTENANCE	Lift Maintenance	14/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9314	
08201001	Renee Creditor	14310	INSURANCE - PREMIUM	Insurance - Premium	14/02/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9314	
807	08200007	24 SEVEN MASTER LOCKSMITHS	13905	GARDEN & GROUNDS	Renee Testing 99		<input type="checkbox"/>	<input checked="" type="checkbox"/>	9314
5	08200022	ALLIANCE PLUMBING	13615	FIRE PRTCN-REPAIRS & SERVICIN	Renee Test		<input type="checkbox"/>	<input checked="" type="checkbox"/>	9314
5	08200022	ALLIANCE PLUMBING	13615	FIRE PRTCN-REPAIRS & SERVICIN	Renee Test	05/02/2024	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9314
5	08200022	ALLIANCE PLUMBING	13615	FIRE PRTCN-REPAIRS & SERVICIN	Renee Test	05/02/2024	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9314
tf	08200134	GUTTER KNIGHT	13405	ELECTRICAL REPAIRS	Electrical Repairs	01/02/2024	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9314

9314 HONOLULU - KEEP Total: 770.00 Outstanding: 770.00 EFT

08200016 ADVANCED BUILDING QLD PTY LTD

Invoice Number	Date	Work Order	Hub	BPAY CRN	Reference	Description	Expense Account	Amount	Paid Amount	Hold
3456457	01/10/2023				D0000014	Renee Test Cred INV	12900 BUILDING REPAIRS	770.00	0.00	<input checked="" type="checkbox"/>

Tag Paid Invoices Hold All Unhold All

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

Search Creditor Invoice Items | Edit Description

In order for this function to be available, the permission called 'Transaction entry edit reverse' under the 'Data Entry' category, must be set to 'Allow' in [Security Setup](#).

Permissions For

Name Administrators

BCMax GLMax DocMax

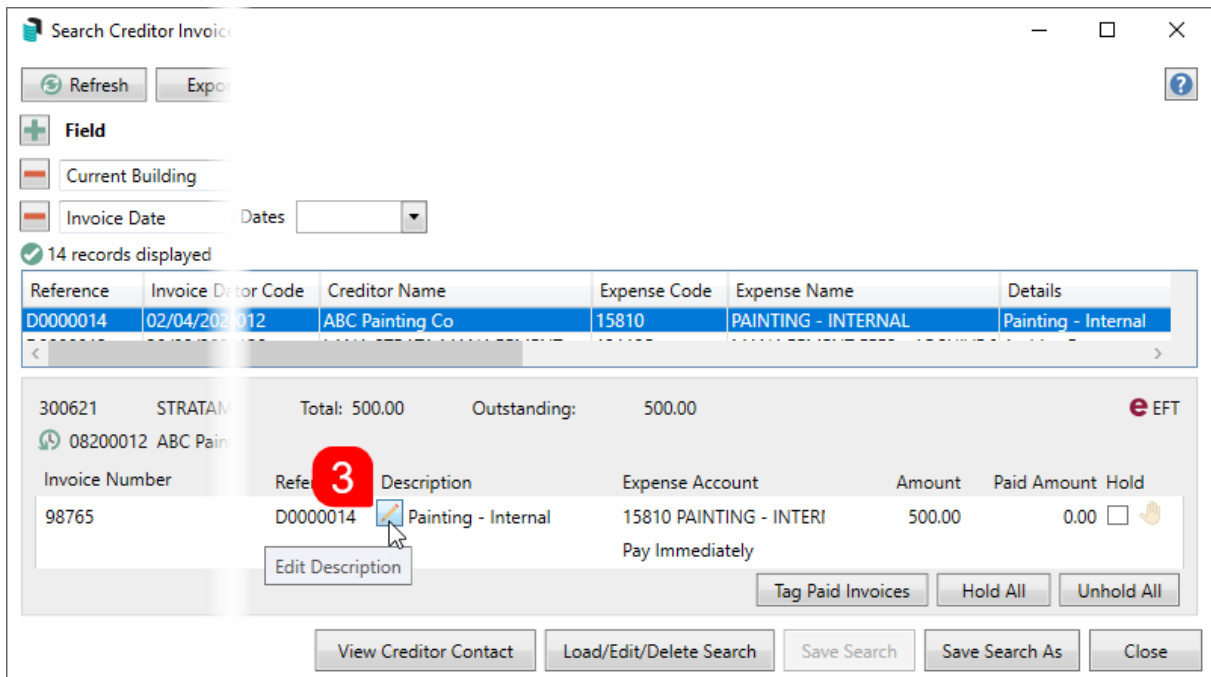
Permissions

Data Entry

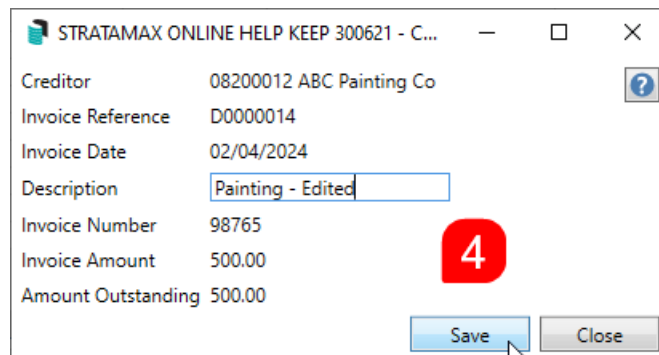
Transaction entry edit reverse

transaction entry edit Filter Close

1. Search or select **Search Creditor Invoice Items**.
2. Locate and select the creditor invoice by adjusting the fields as required, then clicking *Refresh*.
3. In the bottom section of the screen, click the *Edit Description* button (small pencil button under the 'Description' header).



4. The 'Change Description' window will appear, and the *Description* field can be edited. Click Save when done.
 - The 'Change Description' window will close, and the change can be observed immediately.



Search Creditor Invoice Items | Tag Paid Invoices

If there is a Creditor Invoice that is on Hold and not paid that matches a Credit Note entered, the Creditor Invoice can be tagged as paid. Once tagged as paid, the Creditor Invoices will no longer display in any Unpaid Invoice searches or reports.

1. Search or select **Search Creditor Invoice Items**.
2. Locate the Building/Creditor record by adjusting the Fields as required.

Tip: Click *Refresh* if changes to Fields are made. Or use a Saved Search for On Hold .
3. Select the Creditor Code and view the details in the grid in the lower half of the screen.
4. Untag to remove from Hold any Creditor Invoices which match the Credit Note balance.

5. Click *Tag Paid Invoices* to view all available unpaid Creditor Invoices for the selected Creditor code.
6. Tag/tick the Credit Note and Creditor Invoice, the *Difference* must equal 0.00 to be able to click *Save*.

Search Creditor Invoice Items - STRATAMAX ONLINE HELP - KEEP 2024

Refresh Export Advanced Saved Search: All On Hold Invoices

Field Condition Value

Invoice Date is on or after Specific Dates

On Hold is equal to Yes No

Creditor Name contains

12 records displayed

Reference	Invoice Date	Invoice Amount	Invoice Number	Creditor Code	Creditor Name	Expense Code	Expense Name	Details
D0000002	08/01/2024	10.00	651	08200020	ALLIANCE PLUMBING	13905	GARDEN & GROUNDS	Garden & Grounds
D0000001	01/01/2024	10.00	Inv Number	08200020	ALLIANCE PLUMBING	13615	FIRE PRTCN-REPAIRS & SERVICIN	Details
D0000007	04/01/2024	450.00		08200007	AAARUBBISH	12900	BUILDING REPAIRS	Building Repairs
D0000006	04/01/2024	259.00	1454545212	08200009	ABLE TREE SERVICES	13010	CARETAKER	Hedging
D0000004	01/12/2023	100.00		08200003	AUSTRALIAN TAXATION OFFICE	12105	ACCOUNTING	Testing
D0000003	10/12/2023	575.00	3334	08200124	GLASS NOW	12900	BUILDING REPAIRS	Front Window
D0000002	10/12/2023	200.00	1447	08200007	AAARUBBISH	13905	GARDEN & GROUNDS	November 23
D0000001	01/12/2023	150.00	45447878	08200006	A CLEAN SCENE	13105	CLEANING	Foyer Cleaning
D0000005	30/11/2023	1,500.00	454654	08200009	ABLE TREE SERVICES	13905	GARDEN & GROUNDS	Tree Trimming
D0000004	01/11/2023	330.00	454654	08200009	ABLE TREE SERVICES	13905	GARDEN & GROUNDS	Tree Trimming
D0000003	01/10/2023	-150.00	5454	08200009	ABLE TREE SERVICES	13905	GARDEN & GROUNDS	Garden & Grounds
D0000001	01/10/2023	100.00	123152	08200007	AAARUBBISH	12105	ACCOUNTING	Rubbish Sept

123456 LANAS LUXURY RESORT KEEP Total: 100.00 Outstanding: 0.00 Paid

08200007 AAARUBBISH

Invoice Number	Date	Work Order	Hub	BPAY CRN	Reference	Description	Expense Account	Amount	Paid Amount
123152	01/10/2023				D0000001	Rubbish Sept	12105 ACCOUNTING	100.00	100.00

Tag Paid Invoices

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

Search Creditor Invoice Items | Tag Paid Invoices - Convert Journal Balances to Invoices

Use *Tag Paid Invoice* to correct Balances that have been journalled to Creditor accounts, this tool will convert a Journal to a Creditor account to a *Creditor Invoice*. A journal may have been entered to a Creditor account to adjust the balance, such as an ATO adjustment, however Creditor Invoices are required for any balance to a Creditor account so this tool will assist with moving the journal and creating a Creditor Invoice.

1. Search or select **Search Creditor Invoice Items**.
2. Locate the Building/Creditor record by adjusting the Fields as required.
 - o **Tip:** Click *Refresh* if changes to Fields are made. Or use a Saved Search for On Hold .
3. Select the Creditor account and view the details in the grid in the lower half of the screen.
4. Select *Tag Paid Invoices*.
5. 'Convert journal balances to invoices' will be available in the lower half of the screen.
6. Click *Add*.
7. Enter the details into the fields for the *Creditor Invoice* to be created.
8. Click *Save*.

Please see the example below of a balance on the Australian Taxation Office ATO Creditor account due to a Journal being entered to make an adjustment to the Creditor account balance. The Convert Journal Balances to Invoice tool will create a Creditor Invoice for the balance.

Refresh Export Advanced

Field Condition Value

Current Building

Master Chart Code is equal to

Creditor Name starts with

Has Balance or Issues is equal to Yes No

Status is not any of Banned

4 records displayed

Building Number	Building Name	Creditor Code	Creditor Name	Balance	Invoice Total	Credit Note Total	On Hold Total	Status
5656	Renee Building KEEP	08200001	SUNDRY CREDITORS	40.00	600.00	640.00	40.00	None
5656	Renee Building KEEP	08200003	AUSTRALIAN TAXATION OFFICE	-100.00	0.00	0.00	0.00	None
5656	Renee Building KEEP	08200019	ALINTA ENERGY	325.30	325.30	0.00	325.30	None
5656	Renee Building KEEP	08201000	ABC Strata	1,000.00	1,000.00	0.00	0.00	None

5656 Renee Building KEEP Balance: -100.00 Invoice total: 0.00

08200003 AUSTRALIAN TAXATION OFFICE Credit Note total: 0.00

Invoice Number Date Work Order Hub BPAY CRN Reference Description Expense Account Amount Paid Amount Hold

Tag Paid Invoices

View Creditor Contact Invoice Activity Report Aged Balances Load/Edit/Delete Search Save Search Save Search As Close

Creditor Balance / Tag Paid Invoices - Renee Building KEEP 5656

Creditor Code 08200003 Balance -100.00 Invoices 0.00

Creditor Name AUSTRALIAN TAXATION OFFICE Credit Notes -100.00

Difference 0.00

Reference	Invoice Date	Invoice Number	Invoice Hub	Description	Outstanding
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Convert journal balances to invoices

+ Add

Invoice Date	Description	Expense Account	Amount
28/02/2023	ATO Credit	12505 AUDITORS - AUDIT SERVICES	-100.00

Invoice Date 28/02/2023

Description ATO Credit

More Info Credit for an Adjustment made

Expense Account 12505 AUDITORS - AUDIT SERVICES

Amount -100.00

Save Close

Refresh Export Advanced

Field Condition Value

- Current Building
- Master Chart Code is equal to
- Creditor Name starts with
- Has Balance or Issues is equal to Yes No
- Status is not any of Banned

4 records displayed

Building Number	Building Name	Creditor Code	Creditor Name	Balance	Invoice Total	Credit Note Total	On Hold Total	Status
5656	Renee Building KEEP	08200001	SUNDRY CREDITORS	-40.00	600.00	-640.00	-40.00	None
5656	Renee Building KEEP	08200003	AUSTRALIAN TAXATION OFFICE	-100.00	0.00	-100.00	0.00	None
5656	Renee Building KEEP	08200012	ALPHA ENERGY	363.30	363.30	0.00	0.00	None
5656	Renee Building KEEP	08201000	ABC Strata	1,000.00	1,000.00	0.00	0.00	None

5656 Renee Building KEEP Balance: -100.00 Invoice total: 0.00 Cheque None
08200003 AUSTRALIAN TAXATION OFFICE Credit Note total: -100.00

Invoice Number	Date	Work Order	Hub	BPAY CRN	Reference	Description	Expense Account	Amount	Paid Amount	Hold
	28/02/2023				D0000011	ATO Credit	12505 AUDITORS - AUDIT	-100.00	0.00	<input type="checkbox"/>

Tag Paid Invoices Hold All Unhold All

View Creditor Contact Invoice Activity Report Aged Balances Load/Edit/Delete Search Save Search Save Search As Close

Search Creditor Invoice Items | 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.

'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

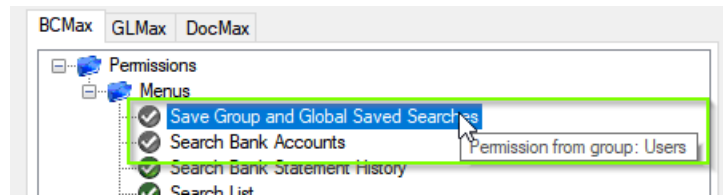
Refresh Export Advanced **Saved Search: Outstanding Work Orders**

Field Condition Value

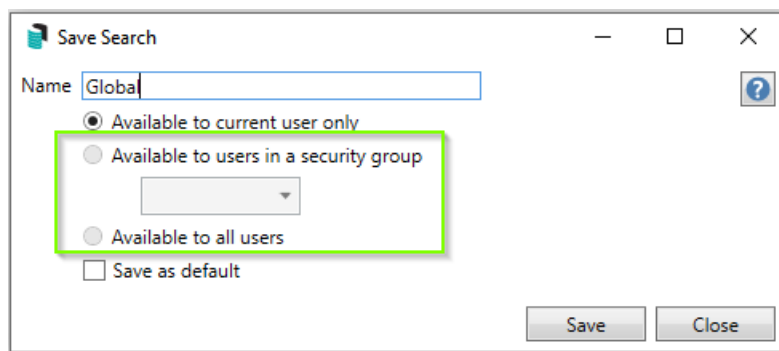
- Current Building
- Status is not equal to E-Finalised
- Deleted is equal to Yes No

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.



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

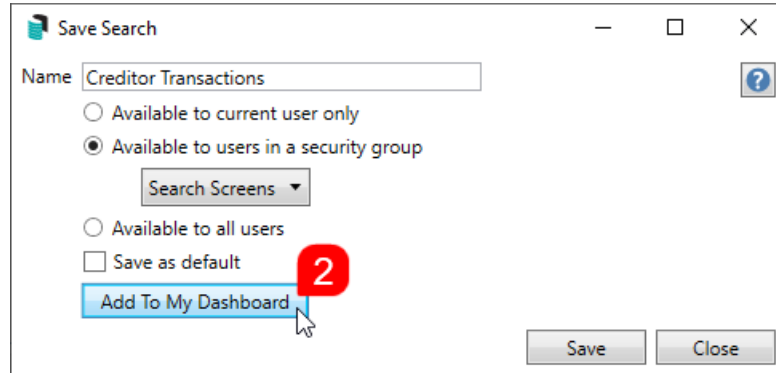
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required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

As of *StrataMax version 5.6.98*, 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 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.

Analysing Expenditure by Contractor Industry or Expense

The **Search Creditor Invoice Items** allows data from the building or across the portfolio to be exported to excel based on columns and date ranges you configure. This data along with tools in excel can be useful for analysing expenditure and producing reports for internal and external use.

1. Search or select **Search Creditor Invoice Items**.
2. Configure the search based on your requirements using the 'Fields'. The example below is based on exporting information for a building for the date range of 01/08/2021 to 31/07/2023.
3. Click the 'Columns' tab and ensure any required columns are added. In the example below the 'Contractor Industry' column has been added.
4. Click the 'Advanced' tab and change the maximum number to 'Unlimited'. (Note that Excel may restrict the number of lines available to report).
5. Click the *Refresh* button to display the results.
6. Click the *Export* button.
7. Use Excel functions such as Pivot Tables and Charts to present data in suitable ways based on your requirements. See [this Microsoft Office website article](#) for instructions regarding Pivot Charts.

Creditor Invoice Items

Refresh Export Advanced

Restrict To: Field Condition Value

Columns: Current Building

Sort Order: Invoice Date is in the range Specific Dates 01/08/2021 to 31/07/2023

Advanced

145 records displayed

Reference	Invoice Date	Invoice Amount	Invoice Number	Creditor Code	Creditor Name	Expense Code	Expense Name
D0000332	20/06/2023	365.00	7684	08200176		15018	
D0000331	03/07/2023	6.60		08200002		12315	
D0000330	03/07/2023	527.70		08200002		12730	
D0000329	21/06/2023	638.18	0132	08200016		17030	
D0000328	28/06/2023	66.00		08200002		12795	
D0000327	28/06/2023	30.00		08200002		12710	
D0000326	09/06/2023	365.00	7507	08200176		15018	
D0000325	01/06/2023	6.60		08200002		12315	
D0000324	01/06/2023	527.70		08200002		12730	
D0000323	30/05/2023	60.00		08200002		12710	
D0000322	01/05/2023	66.00		08200002		12795	
D0000321	28/02/2023	66.00		08200002		12795	
D0000320	27/04/2023	7,700.00	21577	08200762		12500	
D0000319	01/05/2023	6.60		08200002		12315	
D0000318	01/05/2023	527.70		08200002		12730	
D0000317	30/04/2023	30.00		08200002		12710	
D0000316	28/04/2023	365.00	7321	08200176		15018	
D0000315	20/04/2023	822.96	0131	08200016		17030	
D0000314	19/04/2023	365.00	7178	08200176		15018	
D0000313	03/04/2023	6.60		08200002		12315	
D0000312	03/04/2023	527.70		08200002		12730	
D0000311	30/03/2023	120.00		08200002		12710	
D0000310	17/03/2023	291.50	38164	08200049		16010	

Load/Delete Search Save Search Save Search As Close

Example using Pivot Tables and Charts:

