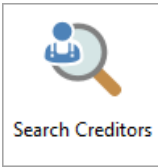


Search Creditors

Last Modified on 11/06/2026 3:44 pm AEST



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

Search Creditors is used to search, view, and report on creditor accounts for a single building or across your portfolio.

This search assists with reviewing creditor details such as balances, on hold balances, payment method, ABN, and master chart alignment. Quick links are also available to open *View Creditor Contact*, *Edit Creditor*, and **Search Creditor Invoice Items**. Results can be saved for ongoing use, 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 Creditors | Security

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

Search Creditors | What it can report on

Search Creditors can report on creditor accounts for a single building or across the portfolio. This includes creditor details such as balance, on-hold balance, payment method, ABN, and master chart status information.

This is useful when you need to review creditor account details, identify accounts that need cleanup, confirm whether a creditor is in the master chart, or open related creditor information for further action.

Search Creditors | Recommended search examples

Review creditor accounts across the portfolio

This search can be used to review creditor accounts across the full portfolio instead of the current building only.

1. Search for or select **Search Creditors**.

2. Review the *Restrict To* tab and adjust or refine further from the default *Current Building*, *Creditor Code*, and *Creditor Name* fields.
3. Refer to the *Columns* tab and include any fields for display.
4. Click *Refresh* to display creditor accounts across the portfolio.

Report on creditor details such as balance, payment method, or ABN

This search can assist with checking creditor details and reporting on fields such as balance, on-hold balance, payment method, or ABN.

1. Search for or select ***Search Creditors***.
2. From the *Restrict To* tab, add the required field and select the required Condition and Value.
3. Refer to the *Columns* tab and include any fields for display.
4. Click *Refresh* to load the results.

Search Creditors - STRATAMAX ONLINE HELP KEEP 300621

Refresh Export Advanced

Field Condition Value

Current Building

Creditor Name is equal to

Master Chart Code is any of

11 records displayed Find First Find Next

Creditor Code	Creditor Name	Telephone	Status	ABN	Balance	On Hold Total
08200012	ABC Painting Co		None	69 604 074 580	1,446.00	-100.00
08200016	TOMMY GENNUSAS		None	98 610 648 729	0.00	0.00
08200018	ADALINE GALAGHER		None		0.00	0.00
08200026	JULIANN DAMMEYER		None		0.00	0.00
08202456	LANA STRATA MANAGEMENT		None	69 333 333 333	-100.00	0.00
08285380	CHU STRATA INSURANCE		None	18 001 580 070	450.00	0.00
08286668	Professor Dave Danger		None		1,000.00	1,000.00
08286652	IRRIGATION FORMOSA		None	77 284 944 066	25.00	0.00
08200005	AUSTRALIAN TAXATION OFFICE		None		0.00	0.00
08286670	LOCAL CREDITOR ACCOUNT		None		0.00	0.00
08200002	Jess BCM Manager (comp9)		None	52 097 607 451	0.00	0.00

Edit Creditor Creditor Contact Invoice Items Print Load/Edit/Delete Search Save Search Save Search As Close

Search multiple master chart codes

This search can be used to report on multiple master chart codes simultaneously.

1. Search for or select ***Search Creditors***.
2. From the fields of restriction, add the *Master Chart Code* field and set the *Condition* to *is any of* with the selection available for multiple statuses.
3. Select the required codes and click *Refresh*.

Export creditor results to Excel

This search can be used to export creditor results to Excel for further review or reporting.

1. Search for or select ***Search Creditors***.
2. Set the required search fields, conditions, and values.

3. Click *Refresh* to load the results.
4. Click *Export* to export the results to Excel.

Search Creditors | Master Chart Status

Search Creditors can include Master Chart Status to assist with creditor account cleanup. This can be useful when a property has been transferred from another StrataMax manager and creditor codes need to be reviewed against the master chart.

The available statuses are *Not in Master Chart*, *Matches Master Chart*, and *Different Code*

1. Search for or select **Search Creditors**.
2. Adjust the field selection to include *Master Chart Status*.
3. Use *Advanced* and review *Columns* so *Master Chart Status* is included in the displayed columns.
4. Click *Refresh* to display the records.
5. Click *Export* if the results need to be reviewed in Excel.

Refresh Export Advanced

Restrict To	Field	Condition	Value
Columns	Creditor Code	starts with	
Sort Order	Creditor Name	starts with	
Advanced	Master Chart Status	is equal to	

First 1000 records displayed

Creditor Code	Creditor Name	Master Chart Status	Telephone	Status	ABN
08204086	ORIGIN ENERGY LPG LTD	Not in Master Chart		None	77000508369
08200001	SUNDRY CREDITORS	Matches Master Chart		None	
08200003	AUSTRALIAN TAXATION OFFICE	Matches Master Chart		None	
08200004	ATO - INCOME TAX	Matches Master Chart		None	
08200002	BODY CORP MANAGER	Different Code	07 5566 8855	None	52097607451

Search Creditors - STRATAMAX ONLINE HELP KEEP 300621

Refresh Export Advanced

Restrict To Available Columns 1
Filter master chart

Columns Master Chart Code
Master Chart Status 2

Sort Order

Advanced Add > < Remove 3

Displayed Columns
Creditor Code
Creditor Name
Telephone
Status
Pay By
ABN
Balance
On Hold Total 4

Search Creditors | Edit Creditor

The *Edit Creditor* button becomes active once a creditor is selected in the results list. Clicking the button opens the *Creditor Details - Edit* screen, where the creditor's details can be managed.

Search Creditors | Creditor Contact

The *Creditor Contact* button becomes active once a creditor is selected in the results list. Clicking the

button opens the *Contact Details* screen, where the creditor's contact details can be managed.

Search Creditors | Invoice Items

For quick access from **Search Creditors** to view creditor invoices for the selected creditor account, highlight the creditor account and click **Search Invoice Items** to open **Search Creditor Invoice Items** without the need to separately access that icon. This can assist with reviewing creditor invoices and adjusting the On Hold flag.

1. Search for or select **Search Creditors**.
2. Locate the creditor account and click **Invoice Items** to open **Search Creditor Invoice Items** which will allow for the individual invoice items to display, with functions to **edit** all of the information including reversing or recreating an invoice.

The screenshot shows two overlapping software windows. The background window is titled 'Search Creditors - SKYLINE III - KEEP 260309'. It features a search interface with 'Restrict To' and 'Columns' sections. A list of creditors is displayed, with 'ADB CONSTRUCTIONS PTY LTD' highlighted in blue. The foreground window is titled 'Search Creditor Invoice Items - 08200039 - SKYLINE III - KEEP 260309'. It shows a search filter for 'Invoice Date' set to 'is greater than or equal to' with a date of '15/02/2026'. Below the filter, a table of invoice items is shown, with one row highlighted in blue. At the bottom of this window, a summary box displays 'Total: 507.50' and 'Outstanding: 507.50'. Below the summary, a table of invoice items is visible, with one row highlighted in blue. At the bottom of the foreground window, a row of buttons includes 'Edit Creditor', 'Creditor Contact', 'Invoice Items', 'Print', 'Load/Edit/Delete Search', 'Save Search', 'Save Search As', and 'Close'. The 'Edit Creditor' button is highlighted in red.

Reference	Invoice Date	Invoice Amount	Invoice Number	Creditor Code	Creditor Name	Expense Code	Expense Name	Details
D0000015	15/02/2026	150.00	30154A	08200039	ADB CONSTRUCTIONS PTY LTD	15950	PLUMBING & DRAINAGE	2nd Expense
D0000014	15/02/2026	357.50	30154A	08200039	ADB CONSTRUCTIONS PTY LTD	17090	UTILITIES - WATER & SEWERAGE	UTILITIES
D0000009	15/02/2026	357.50	30154A	08200039	ADB CONSTRUCTIONS PTY LTD	15810	PAINTING - INTERNAL	Paint & Ing

Reference	Description	More Information	Expense Account	Tax Code	Amount	Paid Amount
D0000014	UTILITIES - WATER &		17090 UTILITIES - WATER &	GST Free Expenses	357.50	0
D0000015	2nd Expense Code		15950 PLUMBING & DRAIN	GST on Expenses	150.00	0