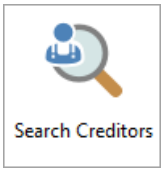
Search Creditors

Last Modified on 10/07/2026 10:09 am 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.

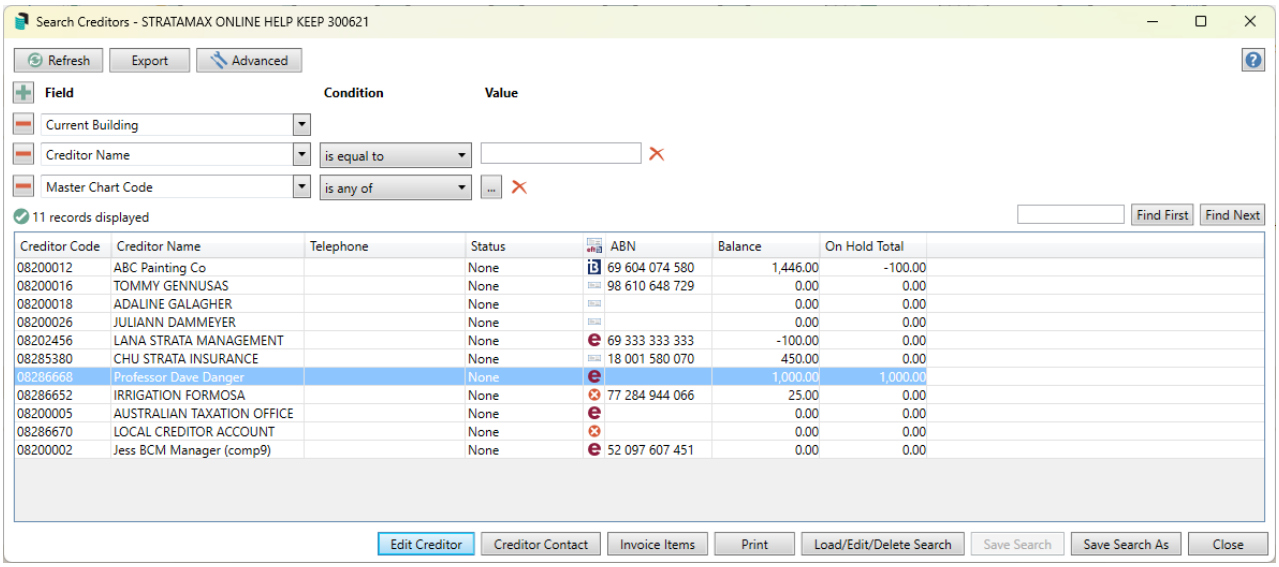
1. Search for or select ***Search Creditors***.

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 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.

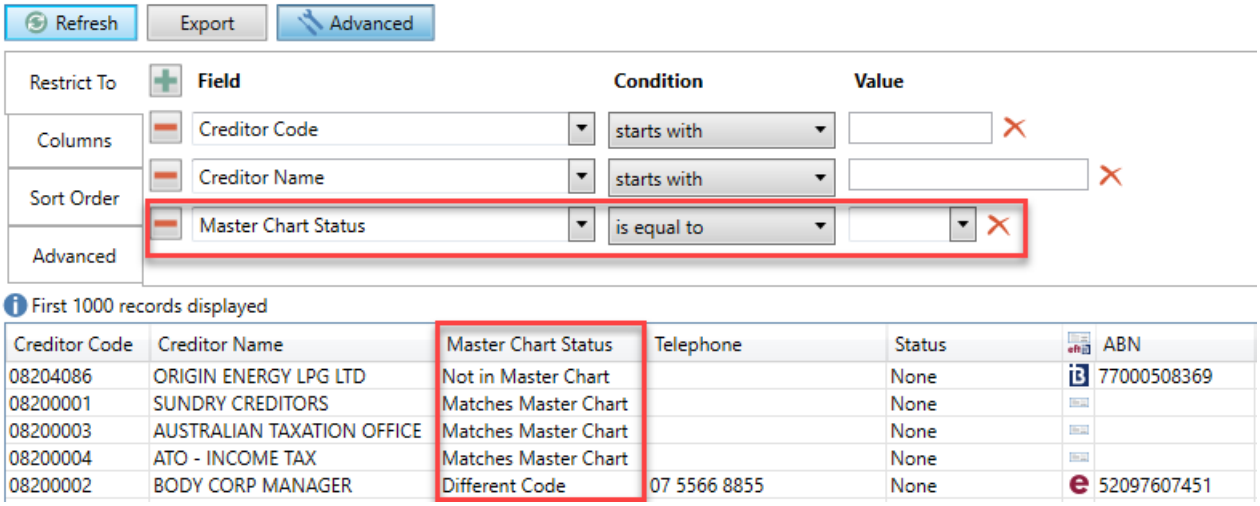
3. Click *Refresh* to load the results.
4. Click *Export* to export the results to Excel.

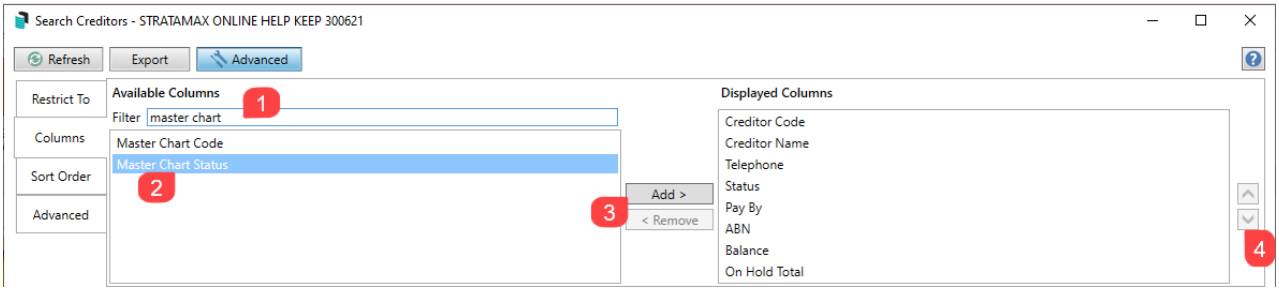
Search Creditors | Master Chart Status

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.





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 indivudual invoice items to display, with functions to edit all of the information including reversing or recreating an invoice.

