Search Local and Global Accounts

Last Modified on 12/06/2025 12:10 pm AEST

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

Search Local Accounts and ***Search Global Accounts*** are designed to report account codes that have either a different description or do not exist in the Master Chart. They will also include all account codes that match the Master Chart. These areas will assist in reporting these account codes and assist with updating ***Account Maintenance*** and ***Change Code Number***. This is the primary tool to use with the Post Building Transfer process. The difference between the two searches is that the building filter is immediately available in the ***Search Local Accounts***. Searches can be saved for continuous use, and the information can then optionally be exported to Excel or produced into a PDF-style document.

Security Setup

To access ***Search Local Accounts*** and ***Search Global Accounts***, the user must have permission set to 'Allow' for *Search Local Accounts* and *Search Global Accounts* under the 'Menu' category in ***Security Setup***.

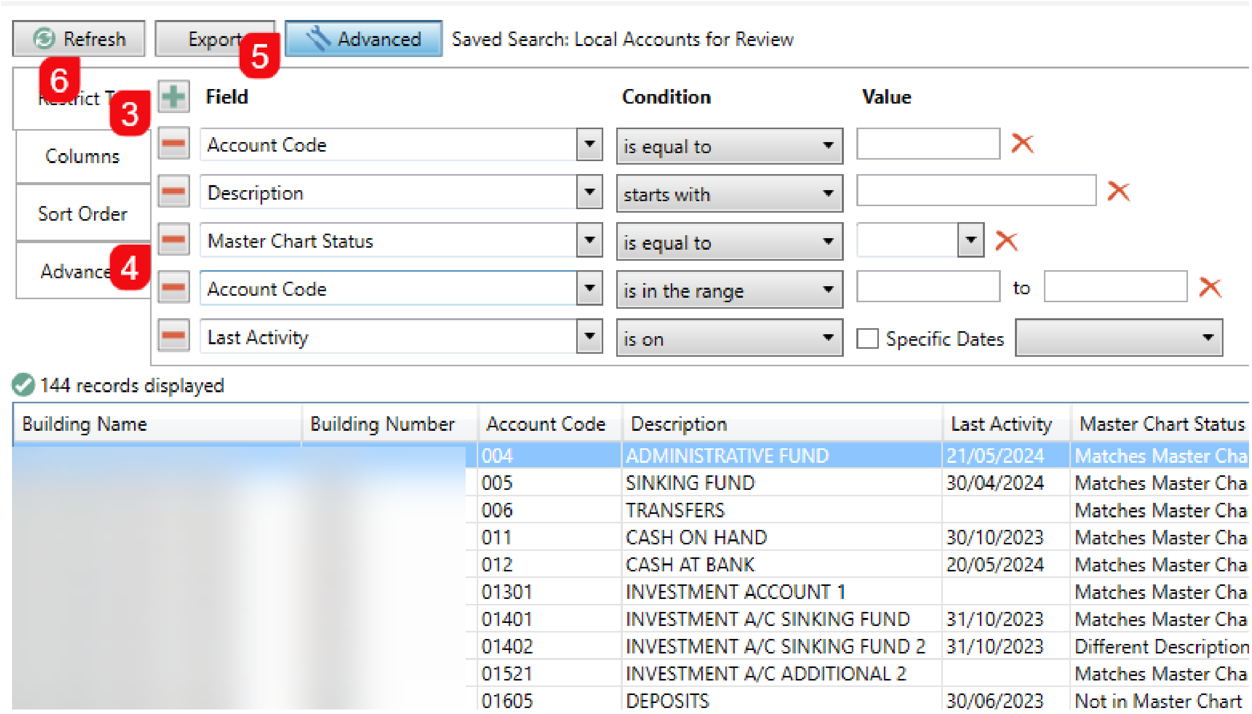
Search Local Accounts and Search Global Accounts

Search Local Accounts is best used for a single building, and ***Search Global Accounts*** does not include a building restriction and displays all account codes globally. Both are designed to assist with identifying account codes that contain a different description or do not exist in the Master Chart. Editing the name of the account code can also be done on this screen.

1. Search or select ***Search Local Accounts*** or ***Search Global Accounts***.
2. By default, the fields Account Code, Description and Master Chart Status will be applied. The Global Accounts Search will include the field Building Number.
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/choose 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 display the records.
7. If you would like to, you can export the data to an Excel sheet by clicking the*Export* button.
8. If the search contains useful restriction and column sort order fields that are frequently reviewed, it can be saved as a saved search for regular use.



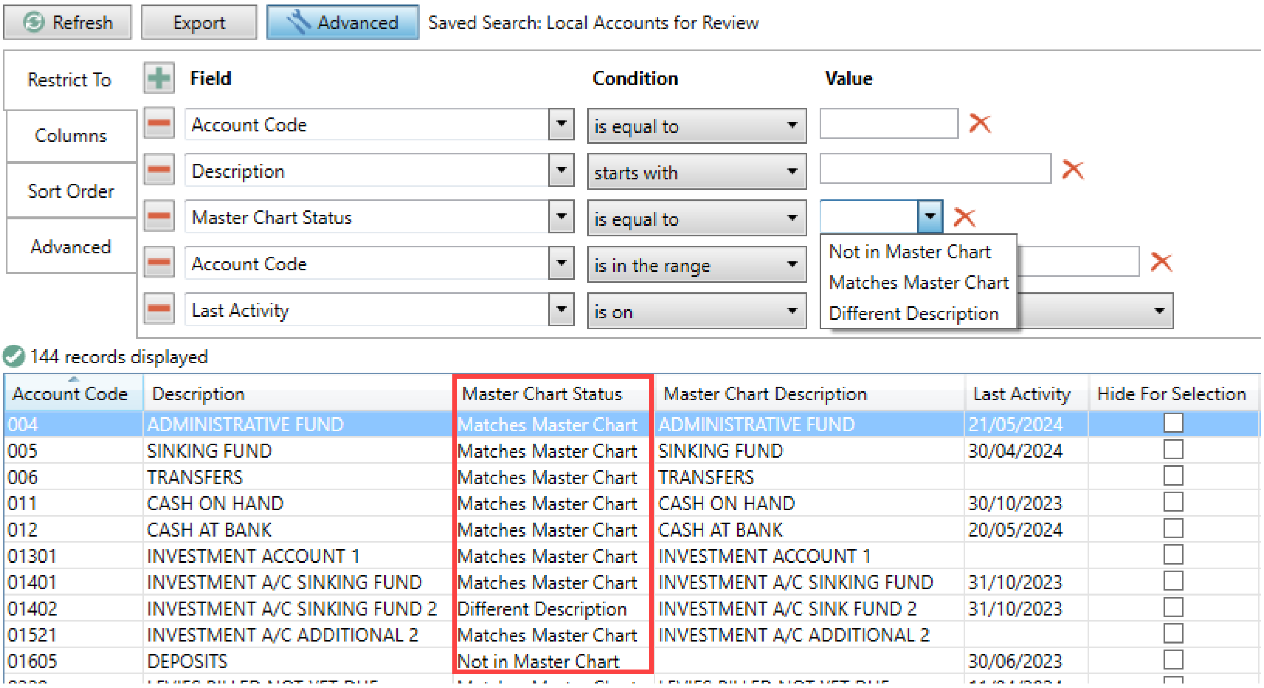
Master Chart Status

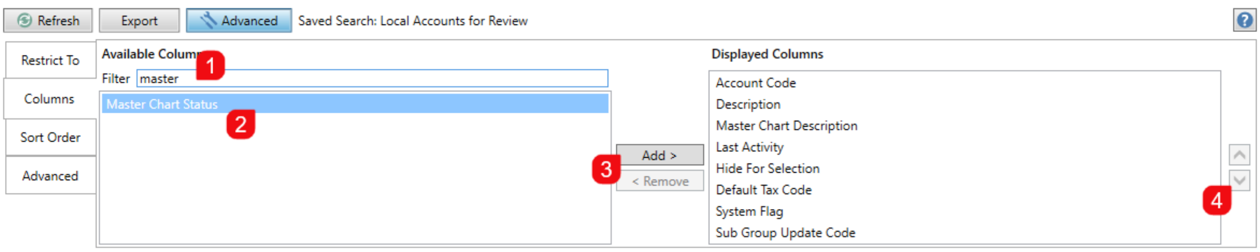
To assist with account code cleanup, the Master Chart Status can be added as a 'Field' to report if the account code is one of the following statuses. This option may be useful if a property has been transferred from another StrataMax manager so that action can be taken to align with your master codes in ***Account Maintenance*** (available to be done in this search using the*Edit* button below) or ***Change Code Number***.

- Not in the Master Chart.
- Matches Master Chart.
- Different Description.

1. Search or select ***Search Local Accounts*** or ***Search Global Accounts***.
2. Adjust the 'Field' to include 'Master Chart Status'.
3. Click *Advanced* and review *Columns* to add the 'Master Chart Status' in the available *Columns.*
4. Click *Refresh* to display the records.

5. Click *Export* to produce the results into an Excel report.

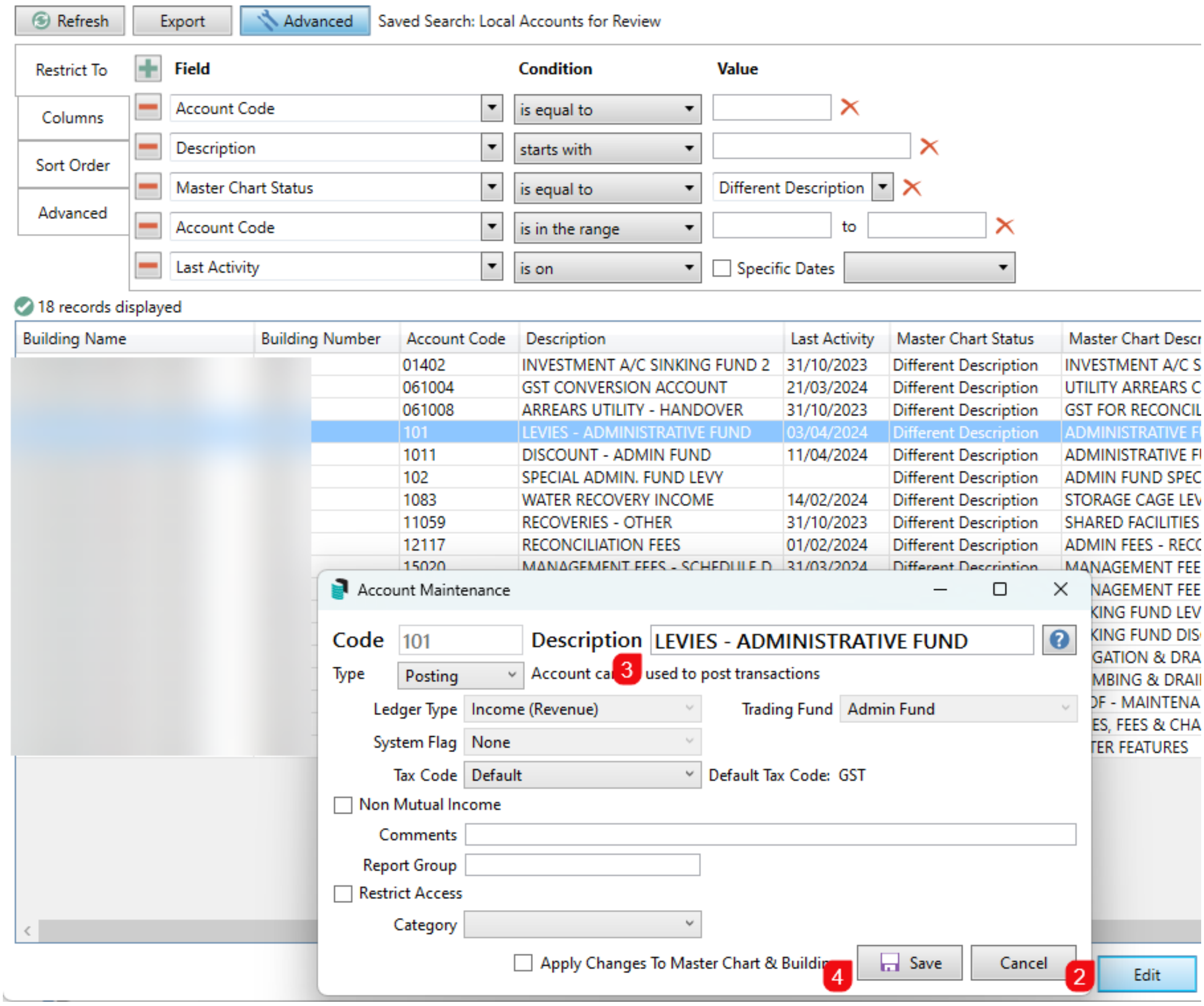




Edit Account Codes

You can edit the account code from each of these search screens. This will provide a quick access area to ***Account Maintenance***, allowing you to edit the account code to align with your master account codes.

1. Follow the steps in ***Search Local Accounts and Search Global Accounts*** to locate the account that needs editing.
2. Select the account code and click the *Edit* button.
3. Edit the *Description* field to match the Master Chart. Review any other fields in the account code setup and adjust if needed.
4. Click *Save.*



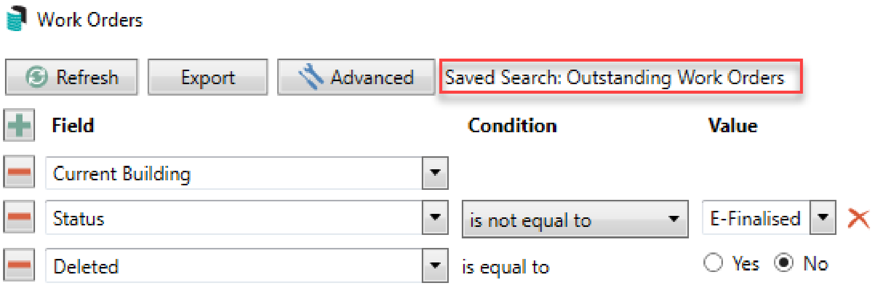
Search Local Accounts or Search Global Accounts | Saved Searches

'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.

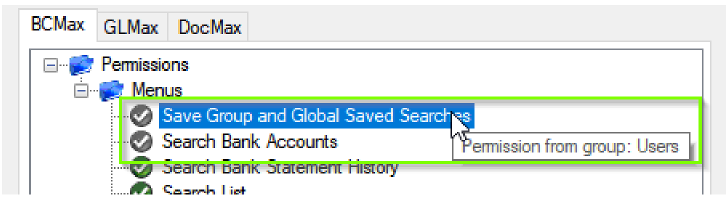
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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

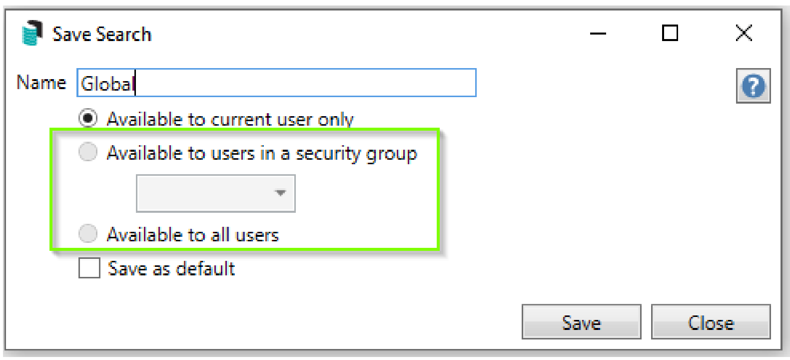


Saved Searches | Security Setup Permissions

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 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

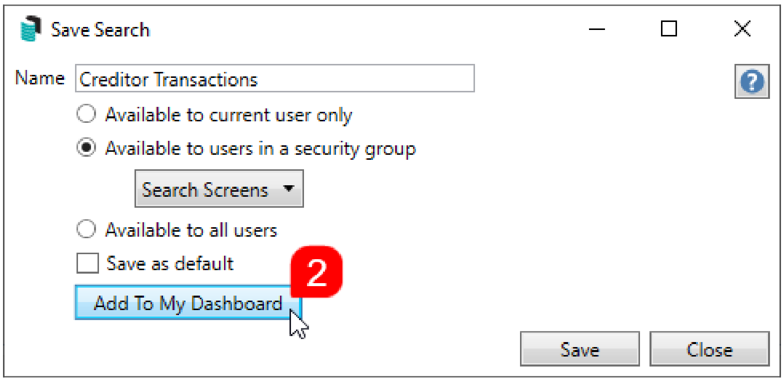
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required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



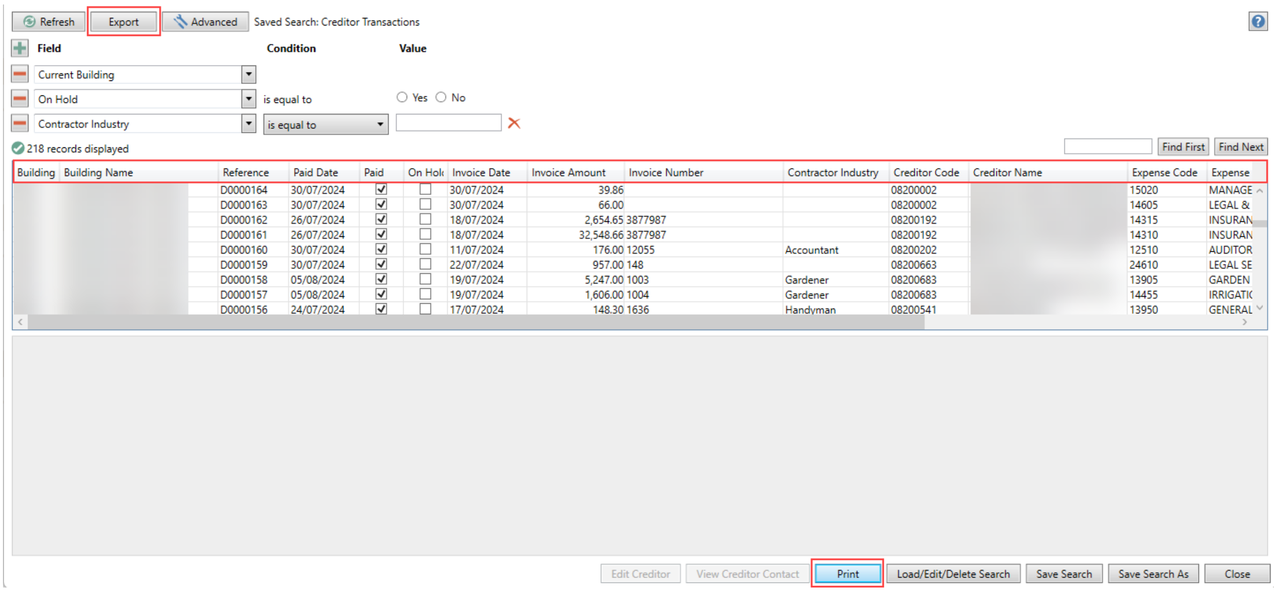
3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See *Display Types* for more information.
7. Tick *Show On Desktop* 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.

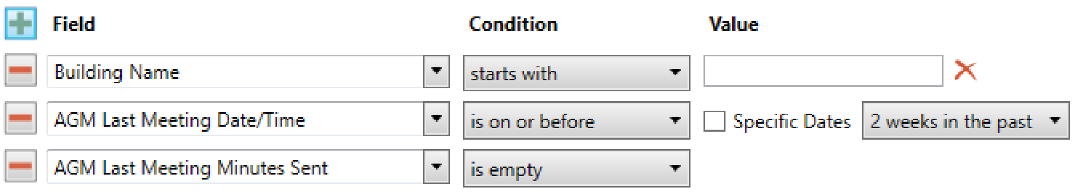


Examples of Searches for Dashboard

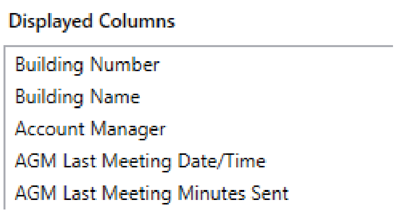
The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes and your particular setup 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:



Displayed Columns:



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	
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

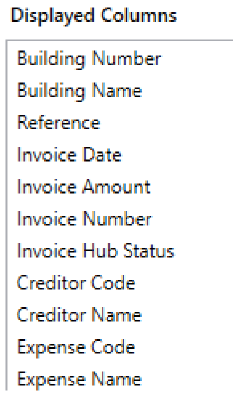
- Bank
- Account Number
- Building Number
- Building Name
- Account Manager
- Bank Account Name
- TD Maturity Date
- TD Interest Rate
- TD Start Date
- TD Renewal Instruction

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

Restrict To:

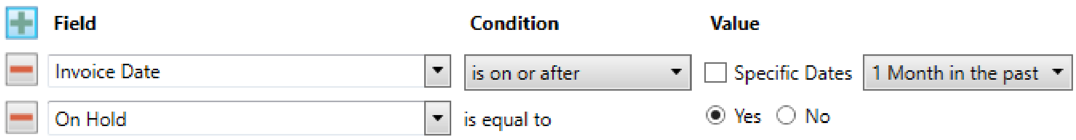
Field	Condition	Value
Invoice Hub Status	is equal to	Uploaded
Invoice Date	is on or before	Specific Dates 1 Month in the past

Displayed Columns:

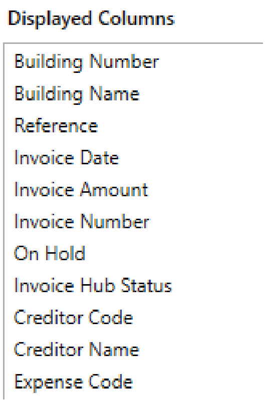


Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

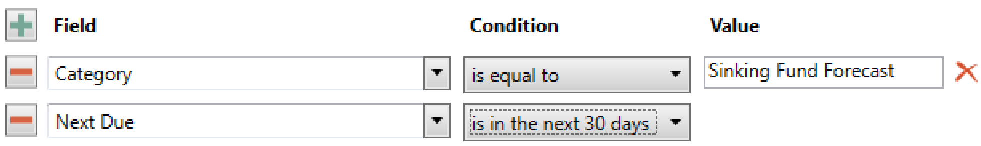


Displayed Columns:



Inspections due in next 30 days (Search Inspections)

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



Displayed Columns:

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

Restric 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