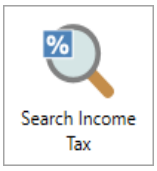
Search Income Tax

Last Modified on 02/07/2026 2:10 pm AEST



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

Search Income Tax is used to query Income Tax for a single building or across a portfolio, including prior tax years.

This search assists with reviewing Income Tax data, viewing the results, or producing the Income Tax Report. 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 Income Tax | Security

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

Search Income Tax | What it can report on

Search Income Tax can report on fields such as Start Date, End Date, Income, Non Mutual Income, Partly Claimable Expense, PAYG Instalments, TFN, and ABN for a single building or across the portfolio.

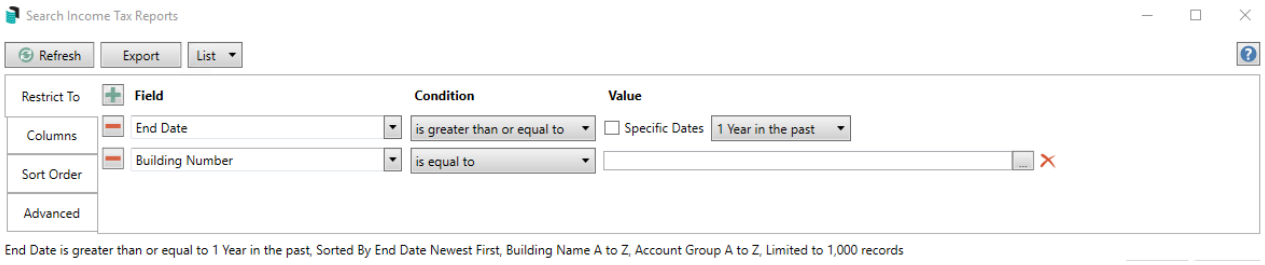
This is useful when you need to review current or historic Income Tax information, compare results across buildings, or produce a list for reporting and export.

Search Income Tax | Recommended search examples

Review income tax for all buildings within 1 year in the past

This search can be used to review Income Tax results for the current building and a specific tax year.

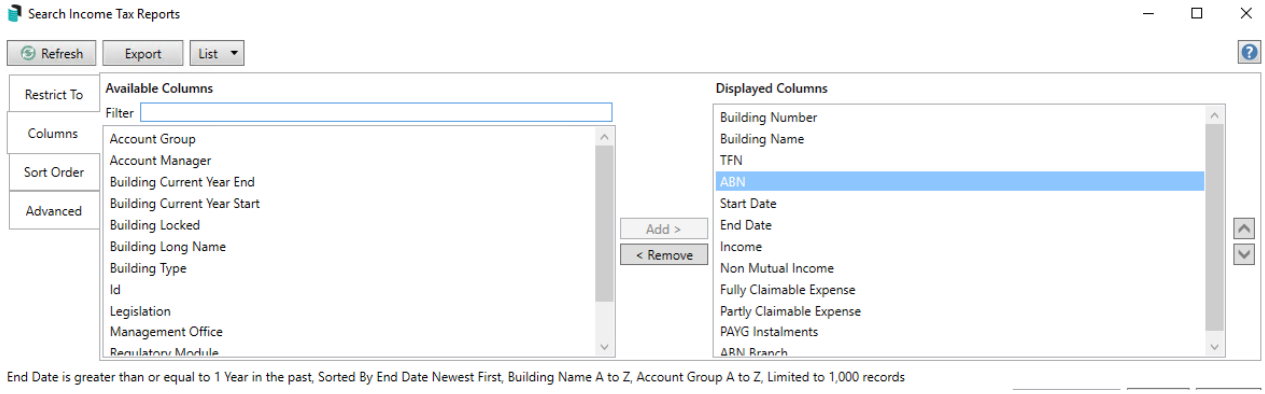
1. Search for or select ***Search Income Tax***.
2. Review the default *Current Building* and *End Date* fields.
3. Select the required date or date range in *End Date*.
4. Click *Refresh* to load the results.
5. For an Excel version, click *Export* or *Print* for a PDF report.



Report on TFN and ABN details

This search can be used to review tax identifier details included in the Income Tax results.

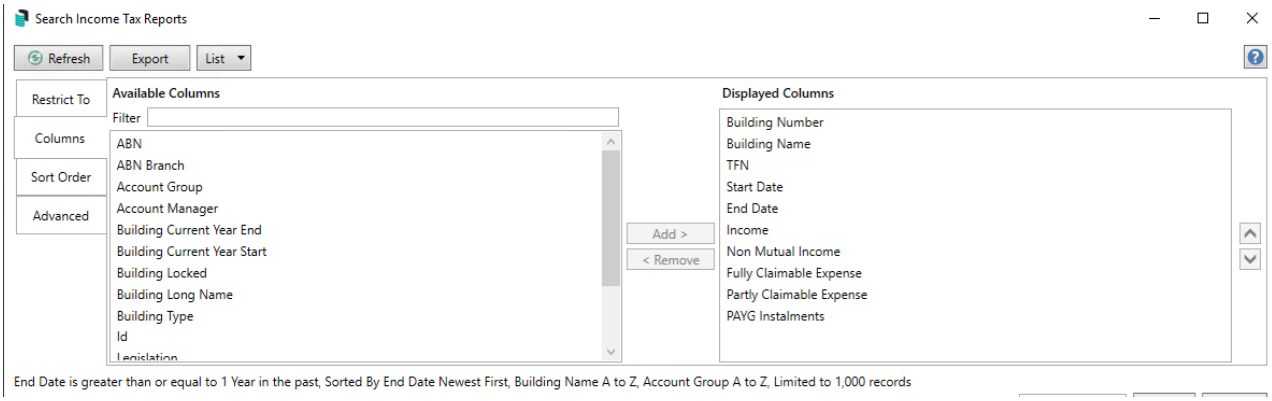
1. Search for or select ***Search Income Tax***.
2. From the *Columns* tab, add the ABN and TFN fields to the displayed column area.
3. Click *Refresh* to load the results.
4. Click *Export* to export the results to Excel or Print for a PDF report.



Export income tax results for reporting

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

1. Search for or select ***Search Income Tax***.
2. Set the required search fields, conditions, and values from the*Restrict To* tab.
3. Set the *Columns* tab to include the tax specific fields.
4. Click *Refresh* to load the results.
5. Click *Export* to export the results to Excel.


Search Income Tax Reports
Refresh
Export
List
Restrict To
Columns
Sort Order
Advanced
Available Columns
Filter
ABN
ABN Branch
Account Group
Account Manager
Building Current Year End
Building Current Year Start
Building Locked
Building Long Name
Building Type
Id
Legislation
Add >
< Remove
Displayed Columns
Building Number
Building Name
TFN
Start Date
End Date
Income
Non Mutual Income
Fully Claimable Expense
Partly Claimable Expense
PAYG Instalments
End Date is greater than or equal to 1 Year in the past, Sorted By End Date Newest First, Building Name A to Z, Account Group A to Z, Limited to 1,000 records