Search Office Bearers

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

Search Office Bearers can easily search Office Bearers / Committee Members by many fields such as names, email addresses, phone numbers, office held and more. A report of Invoice Hub Approvers can also be produced from this icon. This can be narrowed down by a single building, multiple buildings, or across all buildings in a portfolio, which can then optionally be exported to Excel or produced into a PDF-style document.

Search Office Bearers | Security

To access the *Search Office Bearers* icon, the user must have permission set to 'Allow' for the 'Search Office Bearers' permission in the 'Roll' category in *Security Setup*.

Search Office Bearers

Setting Up Filters

- 1. Search or select Search Office Bearers.
 - By default, specific Fields are selected that lend themselves to locating office bearers.
- 2. Select the green *plus* button to add a Field, or the red *minus* button remove a Field.
- 3. Click the Field drop-down menu to select the what you would like to filter by.
- 4. Based on the selected **Field**, the **Condition** can be changed if required ('starts with', 'contains', 'is not equal to', etc.).
- 5. The Value is also dynamic, and will change or disappear based on the Condition.
- 6. Click the *Refresh* button to load the results.
 - Click a column header to sort the data by that column.
- 7. If you would like to, you can export the data to an Excel sheet by clicking the *Export* button.
- 8. Click *Print* to use Report Distribution and produce a PDF-style report.

2	Of 6 Searers - ST 7 MAX ONLINE HELP KEEP 300621										×
	6	Refresh Export	🔧 Advanced	ł							?
	Field Current Building				Condition		Value				
					3						
	-	Is Current		•	•	4		5			
•	e Contact Title			▼ starts with				×			
	—	Office Held		•	starts with	•			×		
	Ø 1	record displayed									
	Off	fice Held	Reference Name			Contact Title					
	Bod	dy Corp. Manager	(IA) MURRAY FOX			(IA) Murray Fo:	x				
			8 Print	Lo	ad/Edit/Delet	te Search	Save Search	Save Sea	rch As	Clo	ose

Setting Display Columns & Sort Order

- 1. Click the *Advanced* button to display additional tabs down the left side.
- 2. Click the *Columns* tab to add, remove, or change the order of the columns.
- Select the required column in the Available Columns list and click the Add > button to add it to the displayed columns. Likewise, if you want to remove a column, select the column to remove in the Displayed Columns list and click the < Remove button.
 - The display order of the columns, from left to right, can be changed by selecting the column in the **Displayed Columns** list, and clicking the *up* and *down* arrows.

🖲 Refresh	Export Advanced				
Restrict To	Available Columns		Displayed Columns	 	
	Filter		Office Held		
Columns	Bank Account Number	~	Reference Name		
Sort Order	BSB		Contact Title		
Sort Order	Building Name				
Advanced	Building Number				
	Comments 1	Add	1 < F		I
	Comments 2	< Rer	nove		
	Contact Type				ľ
3	Date of Appointment				
-	Date of Resignation				
	Delivery Preference Correspond	dence			
	Loc or Ne	Ť			
1 record disp	,			 	
Office Held	Reference Name	Cor	itact Title		
Body Corp. Ma	nager (IA) MURRAY FOX	(IA)	Murray Fox		

- 4. Click the Sort Order tab to change how the data in the table is sorted (by column, A-Z, etc.).
- 5. Select the required column in the Available Columns list and click the Add > button to add it to the

displayed columns. Likewise, if you want to remove a column, select the column to remove in the **Sorted Columns** list and click the *< Remove* button.

- Once the items have been added to the Sorted Columns list, you can click the button next to each item to change the sort order. For example, the button will change between 'A to Z' and 'Z to A' when clicked, between 'False First' and 'True First'.
 - The display order of the columns, from left to right, can be changed by selecting the column in the **Displayed Columns** list, and clicking the *up* and *down* arrows.

Refresh	Export Advanced					
Restrict To	Available Columns			Sorted Columns	6	
Columns Sort Order	Delivery Preference Correspondence Delivery Preference Notices	^		Date of Appointment Contact Title Building Number	Oldest First A to Z A to Z	
	Delivery Preference Utility Billing Email Address			Email for Invoice Hub	False First	Ī,
	Email for Committee Correspondence Email for Correspondence Email for Levy Notice		Add > < Remove			
	Email for Remittance Advice Email for Utility Billing					
	Email for Work Orders Given Names	>				
I record disp	blayed			*		
Office Held	Reference Name		Contact Title	~		
	nager (IA) MURRAY FOX		(IA) Murray Fox			

Each column can be clicked on to adjust the sort order.

Search Contacts | 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.

] v	Vork Orders			
3	Refresh Export	Advanced	Saved Search: Outstanding V	Vork 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.

BCMax GLI	lax DocMax
🖃 🧽 💓 Perr	nissions
ė- 💽	Menus
	Save Group and Global Saved Searches
	Search Bank Accounts
	Search Bank Statement History
	Search List

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.

🗃 Save Search	_		×
Name Global]		0
Available to current user only			
Available to users in a security group Available to all users			
Save as default	Save	CI	ose

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 groupwill 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.

📄 Sa	ve Search		_		×
Name	Creditor Transactions				0
	 Available to current user only 				
	 Available to users in a security group 				
	Search Screens 💌				
	 Available to all users 				
	Save as default				
	Add To My Dashboard				
	6	S	ave	C	lose

- 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.
- 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.

Field		ndition		Value								
Current Building	•											
On Hold	▼ is e	qual to		○ Yes ◯) No							
Contractor Industry	▼ is e	equal to	•		×							
218 records displayed											Find First	Find N
ilding Building Name	Reference	Paid Date	Paid	On Hol	Invoice Date	Invoice Amount Invoice	e Number	Contractor Industry	Creditor Code	Creditor Name	Expense Code	Expense
	D0000164	30/07/2024	~		30/07/2024	39.86			08200002		15020	MANAG
	D0000163	30/07/2024	1		30/07/2024	66.00			08200002		14605	LEGAL 8
	D0000162	26/07/2024	-		18/07/2024	2.654.65 387798	37		08200192		14315	INSURA
	D0000161	26/07/2024	-		18/07/2024	32.548.66 387798			08200192		14310	INSURA
	D0000160	30/07/2024	-		11/07/2024	176.00 12055		Accountant	08200202		12510	AUDITO
	D0000159	30/07/2024	-		22/07/2024	957.00 148			08200663		24610	LEGAL S
	D0000158	05/08/2024	-		19/07/2024	5.247.00 1003		Gardener	08200683			GARDE
	D0000157	05/08/2024	-		19/07/2024	1,606.00 1004		Gardener	08200683		14455	IRRIGAT
	D0000156	24/07/2024	-		17/07/2024	148.30 1636		Handyman	08200541		13950	GENERA

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:

🖶 Field	Condition	Value	
 Building Name 	▼ starts with	•	×
AGM Last Meeting Date/Time	▼ is on or before	Specific Dates	2 weeks in the past 💌
AGM Last Meeting Minutes Sent	▼ is empty	•	

Displayed Columns:

Displayed Columns

Building Number Building Name Account Manager AGM Last Meeting Date/Time AGM Last Meeting Minutes Sent

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:

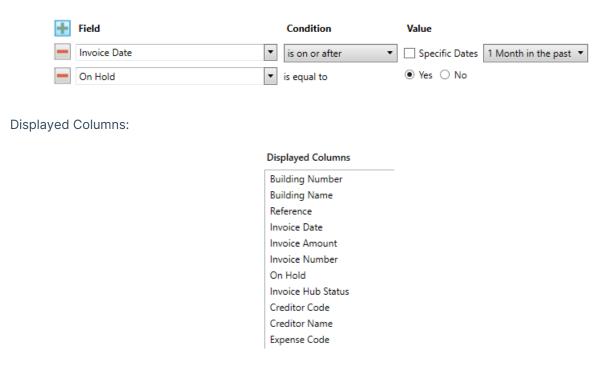
Field	Condition	Value	
Invoice Hub Status	▼ is equal to	▼ Uploaded ▼ ×	
Invoice Date	▼ is on or before	e 🔹 🗸 🖸 Specific Dates 🛛 Month in the pas	st 🔻

Displayed Columns:

Displayed Columns Building Number Building Name Reference Invoice Date Invoice Amount Invoice Number Invoice Hub Status Creditor Code Creditor Name Expense Code Expense Name

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

Restrict To:



Inspections due in next 30 days (Search Inspections)

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

🕂 Field	Cond	lition	Value	
Category	▼ is eq	ual to	Sinking Fund Forecast	×
- Next Due	▼ is in t	the next 30 days	•	

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

Restrict 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		