

# Search Insurance

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The instructions in this article relate to **Search Insurance**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

The **Search Insurance** screen has been designed for users to search specific insurance policies throughout StrataMax, across all buildings in a portfolio, that can then optionally be exported to Excel.

It is recommended to use **Search Insurance** for all global reporting of [Insurance](#) policies.

## Search Insurance | Security

To access the **Search Insurance**, the user must have permission set to 'Allow' for *Search Buildings* under the 'Building' category in [Security Setup](#).

## Search Insurance

Using the 'Restrict To' fields, [Insurance](#) data can be limited to what needs to be displayed, whether it is based on 'Policy Type,' 'Sum Insured,' 'Insurer' and more. Clicking the *Advanced* button displays more tabs so that columns can be included or excluded, setting of the sort order, and limiting the maximum number of records to report.

The results can also be saved for a [Saved Search](#), which will allow this to be used at a later time and can be made available for a single *User* or *Group*.

To select multiple fields in the 'Columns' display area, click the first field, hold the keyboard Ctrl key, and select the following field. This will select both fields and allow these to be moved up or down simultaneously.

### Setting Up Filters

Using filters, the results of the report can be based on specific requirements. To set up the reporting

requirements follow the below steps:

1. Search or select **Search Buildings**.
  - By default, the 'Building Name' and 'Legislation' **Fields** are selected.
2. Select the green *plus* button to add more **Fields**, then click the drop-down menu to choose the required **Field** (from *Insurance*).
  - If a **Field** needs to be removed, click the red *minus* button next to the field.

Insurance

Refresh Export Advanced

2 + Field Condition Value

Current Building 1

16 records displayed

Building Number	Building Name	Code	Policy Type	Sum Insured	Insurer	Policy Number	Pre
11295	SURFERS AQUARIUS	901	BUILDING	147,101,000	CHU Underwriting Ag	HU0006076866	210 ^
11295	SURFERS AQUARIUS	902	PUBLIC LIABILIT	30,000,000	CHU Underwriting Ag	HU0006076866	Incl
11295	SURFERS AQUARIUS	903	COMMON AREA	1,471,010	CHU Underwriting Ag	HU0006076866	Incl
11295	SURFERS AQUARIUS	904	LOSS OF RENT	22,065,150	CHU Underwriting Ag	HU0006076866	Incl
11295	SURFERS AQUARIUS	905	FIDELITY GUARA	250,000	CHU Underwriting Ag	HU0006076866	Incl v

< >

Load/Edit/Delete Search Save Search Save Search As Close

3. Depending on the selected **Field**, the **Condition** may or may not be changed to suit your needs ('Is equal to,' 'contains,' 'is in the range,' etc.).
4. Select the required **Value** - selected by radio button, chosen from a drop-down menu with data options, date ranges or specific dates, or typed manually.
  - If the **Value** can be either typed or selected from a drop-down menu, you can clear the selection by clicking the red cross icon next to the **Value**.
5. Click the *Refresh* button to load the results.
  - Click a column header to sort the data by that column.
6. Click the *Export* button if the data needs to be exported to Excel, where it can be freely modified or printed as a report, etc.
7. Optionally, the results can be saved as a 'Saved Search' for convenience, so that it can be loaded at a later time. See below for more info.

Insurance

Refresh Export Advanced

Field Condition Value

Due Date is on or after Specific Dates 1 Month in the future

First 1000 records displayed

Building Number	Building Name	Code	Policy Type	Due Date	Sum Insured	Insurer	Pol
56656	CRAIG KEEP	901	BUILDING	09/11/2024	20,000	Jess Insurance	99
56656	CRAIG KEEP	902	LOSS OF RENT	10/11/2024	20,001	Jess Insurance	100
6417	NOOSA ON THE BEACH KEEP	912	LAST VALUATION	03/06/2027		Whittaker & Lukins As	QC
10665	OWNERS CORP. NO. 10665	901	BUILDING	30/09/2024	4494000	Allianz	VCS

Load/Edit/Delete Search Save Search Save Search As Close

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

## Setting Display Columns & Sort Order

The displayed columns can be changed by clicking the *Advanced* button, then selecting the *Columns* tab. Select the required column (use the *Filter* to search for the required column) and use the *Add* or *Remove* buttons. In the displayed columns section use the *Up* and *Down* arrows to move the required columns.

Buildings

Refresh Export Advanced

Restrict To

Columns

Sort Order

Advanced

Available Columns

Filter

ABN

ABN Branch

Account Manager Assistant Coirts

Account Manager Assistant Name

ACN

Activity Report Frequency

Address 1

Address 2

Address 3

Add >

< Remove

Displayed Columns

Building Number

Building Name

Status

Account Manager

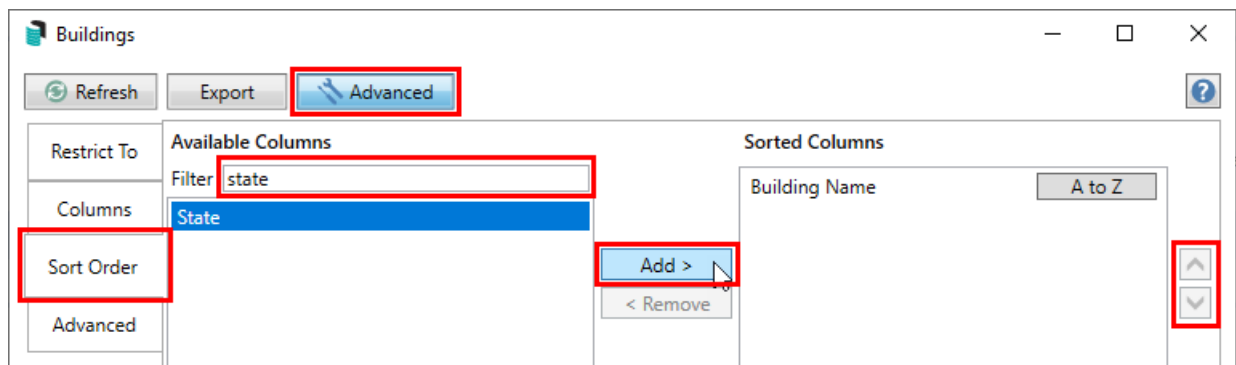
Management Office

State

Building Type

Regulatory Module

The sort order can be changed by clicking the *Advanced* button, then selecting the *Sort Order* tab. In the **Available Columns** list, select the required column (use the *Filter* to search for the required column), and click the *Add >* button to add the column. In the **Sorted Columns** list, use *< Remove* button to remove a column, and the *Up* and *Down* arrows to move the required columns up or down the list.



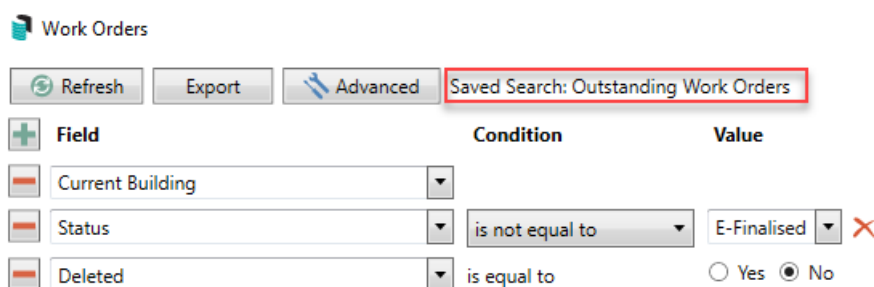
## Search Buildings | Saved Searches

'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.

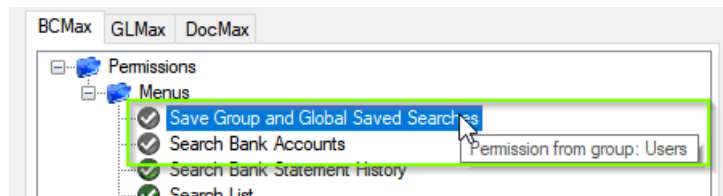
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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

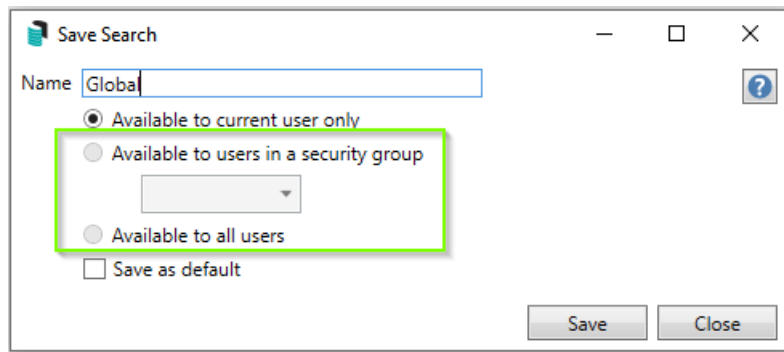


## Saved Searches | Security Setup Permissions

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

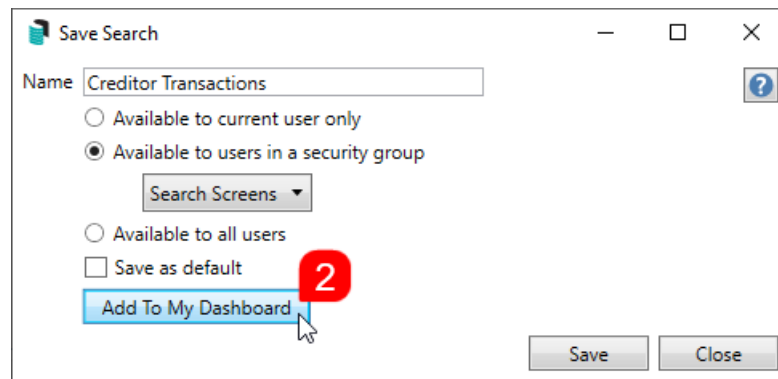
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required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

Refresh Export Advanced Saved Search: Creditor Transactions

Field Condition Value

Current Building is equal to Yes No

On Hold is equal to

Contractor Industry is equal to

218 records displayed

Building	Building Name	Reference	Paid Date	Paid	On Hold	Invoice Date	Invoice Amount	Invoice Number	Contractor Industry	Creditor Code	Creditor Name	Expense Code	Expense
		D0000164	30/07/2024	✓	<input type="checkbox"/>	30/07/2024	39.86			08200002		15020	MANAGE
		D0000163	30/07/2024	✓	<input type="checkbox"/>	30/07/2024	66.00			08200002		14605	LEGAL &
		D0000162	26/07/2024	✓	<input type="checkbox"/>	18/07/2024	2,654.65	3877987		08200192		14315	INSURAN
		D0000161	26/07/2024	✓	<input type="checkbox"/>	18/07/2024	32,548.66	3877987		08200192		14310	INSURAN
		D0000160	30/07/2024	✓	<input type="checkbox"/>	11/07/2024	176.00	12055	Accountant	08200202		12510	AUDITOR
		D0000159	30/07/2024	✓	<input type="checkbox"/>	22/07/2024	957.00	148		08200663		24610	LEGAL SE
		D0000158	05/08/2024	✓	<input type="checkbox"/>	19/07/2024	5,247.00	1003	Gardener	08200683		13905	GARDEN
		D0000157	05/08/2024	✓	<input type="checkbox"/>	19/07/2024	1,606.00	1004	Gardener	08200683		14455	IRRIGATI
		D0000156	24/07/2024	✓	<input type="checkbox"/>	17/07/2024	148.30	1636	Handyman	08200541		13950	GENERAL

Edit Creditor View Creditor Contact Print Load/Edit/Delete Search Save Search Save Search As Close

## 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	<input type="checkbox"/> 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	<input type="text"/>  
 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	<input type="checkbox"/> Specific Dates <input checked="" type="checkbox"/> 1 Month in the past 



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:

Field	Condition	Value
 Invoice Date	is on or after	<input type="checkbox"/> Specific Dates 1 Month in the past
 On Hold	is equal to	<input checked="" type="radio"/> Yes <input type="radio"/> No




Displayed Columns:

#### Displayed Columns

Building Number  
Building Name  
Reference  
Invoice Date  
Invoice Amount  
Invoice Number  
On Hold  
Invoice Hub Status  
Creditor Code  
Creditor Name  
Expense Code

### Inspections due in next 30 days (Search Inspections)

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

Field	Condition	Value
 Category	is equal to	Sinking Fund Forecast 
 Next Due	is in 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