

Searches

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In StrataMax, search screens provide a practical way to find, review, and report on information across different areas of the system. These searches can assist with everyday tasks such as checking records, reviewing transactions, following up outstanding items, and preparing information for reporting.

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 basics

1. Open the required search screen.
2. The search screen will open with a table showing the records available for that search.
3. Use the *Restrict To*, *Columns*, *Sort Order* & *Advanced* tabs to set the restrictions, choose the columns to display, and control the sort order.
4. Click *Refresh* to apply any changes and display the updated results.
5. If required, click *Export* to export the current search results to Excel.
6. Use the *Find First* and *Find Next* options to locate a specific record in the results.
7. Depending on the search screen being used, additional buttons such as *Details*, *Transactions*, or *Report* may be available once a record is selected.
8. Once the search has been set up, click *Save Search As* to save it for later use.
9. Use *Load/Edit/Delete Search* to load a saved search, or to edit or delete an existing saved search.
10. If a saved search has been loaded and you make changes, click *Save Search* to save the updates to that search.
11. If required, click *Add Dashboard Item* to make the search available from the Dashboard.

Search Roll - STRATAMAX ONLINE HELP 1521

Refresh Export List Saved Search: All Roll Positions/ All Buildings

Restrict To	Field	Condition	Value
Columns	Roll Position	is equal to	
Sort Order	Is Current		
Advanced	Contact Title	contains	
	Building Number	is equal to	
	Phone Number	contains	

Is Current, Sorted By Building Name A to Z, Lot Number A to Z, Limited to 10,000 records

Find First Find Next

Building Name	Building Number	Contact Type	Contact Title	Email Address	Phone Number	Roll Position	Unit Number

Details Transactions Print Load/Edit/Delete Search Save Search Save Search As Close

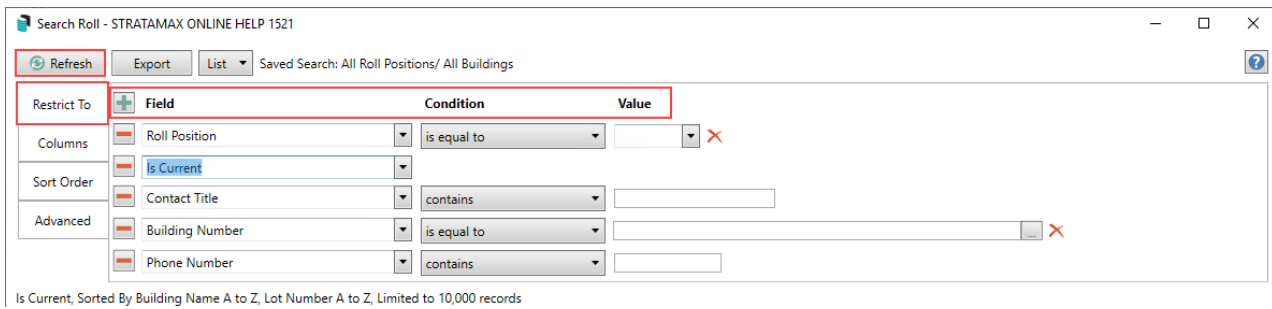
Restrict To

The *Restrict To* tab is used to define which records should be returned in the search results. This is where the search fields, conditions, and values are entered.

1. To add a restriction field, click the green *plus* button.
2. To remove a restriction field, click the red *minus* button.
3. Select the required option from the *Field* list.
4. Select the required option from the *Condition* list.
5. Enter or select the required *Value*.
6. Click *Refresh* to apply the restriction and update the results.

The available *Condition* and *Value* options will vary depending on the selected field. For example, date fields may provide date-based conditions, and some conditions may change or remove the value field depending on the option selected.

If required, the same field can be added more than once to apply different values or conditions in the one search. This can be helpful when refining results without needing to run separate searches.

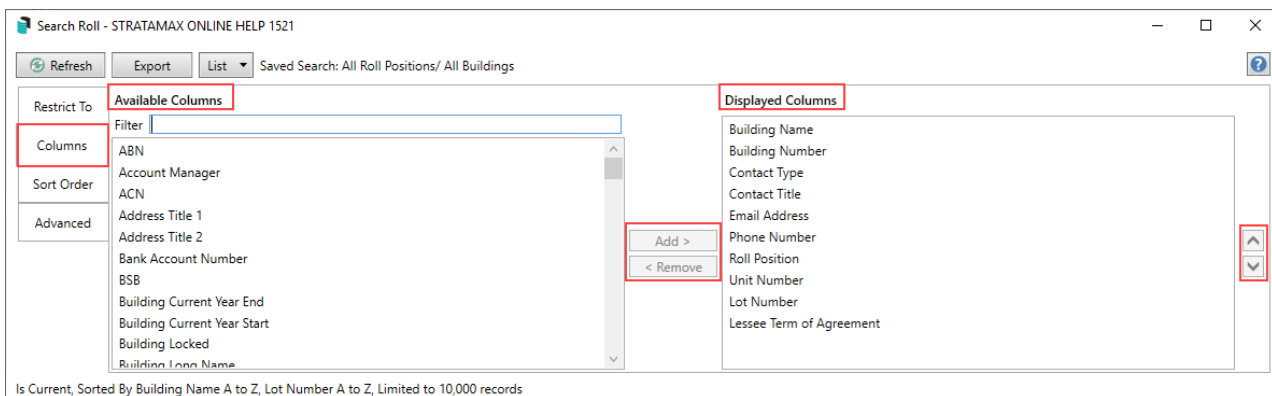


Columns

The *Columns* tab is used to choose which fields are displayed in the search results. This can be used to show only the information needed for review, reporting, or export.

1. In the *Available Columns* list, select the column to be added.
2. Click *Add >* to move it to the *Displayed Columns* list.
3. To remove a column, select it in the *Displayed Columns* list and click *< Remove*.
4. To change the order of the displayed columns, select a column and use the *up* or *down* arrows.

The order of the columns in the *Displayed Columns* list determines the order they appear in the search results.

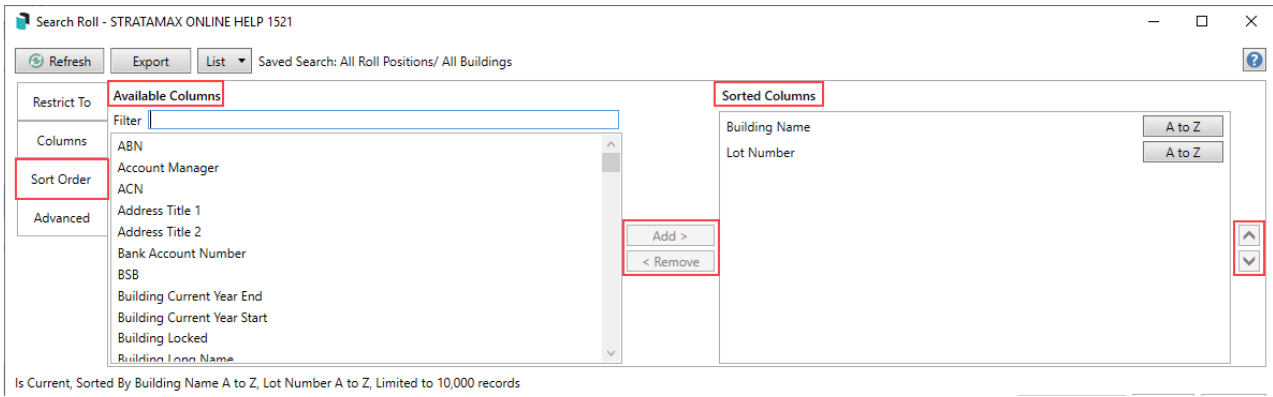


Sort Order

The *Sort Order* tab is used to control the order in which the search results are displayed. This can assist with reviewing records in a more useful order.

1. In the *Available Columns* list, select the column to sort by.
2. Click *Add >* to move it to the *Sorted Columns* list.
3. To remove a sorted column, select it in the *Sorted Columns* list and click *< Remove*.
4. To change the order of the sorted columns, select a column and use the *up* or *down* arrows.
5. Set the required sort direction for each column.
6. Click *Refresh* to apply the updated sort order.

The sort order may also be changed by clicking a column heading in the search results. When selected, the heading will indicate the current sort direction.

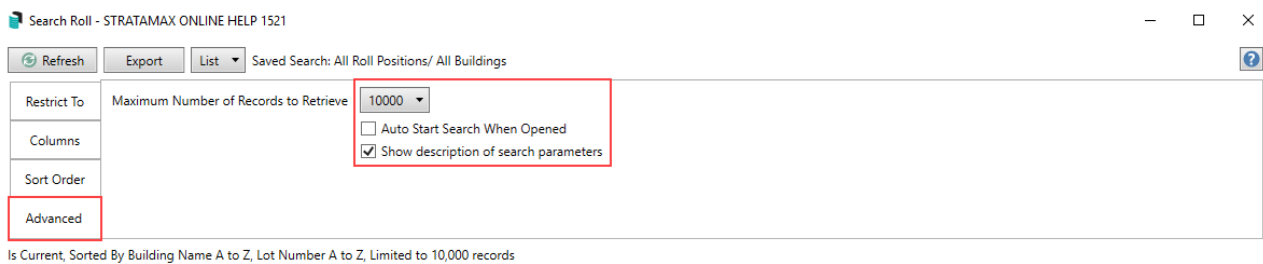


Advanced

The *Advanced* tab provides additional search options that can assist when working with larger result sets or reviewing search criteria.

1. If required, enter a figure in *Maximum Number of Records to Retrieve* to limit the number of results returned.
2. If required, select *Read Uncommitted*.
3. If required, enter a value in *Database Timeout*.
4. If available, select *Show description of search parameters* to display a summary of the search criteria on screen.
5. Click *Refresh* to apply the updated settings.

If *Show description of search parameters* is unticked, the description will no longer appear, but the search results will remain the same.



Use multiple conditions for the same field

Searches can include the same field more than once, allowing different values or conditions to be used in the one search.

1. Open the required search.
2. In *Restrict To*, add the required field.
3. If needed, add the same field again.
4. Enter the required condition and value for each field.
5. If required, open *Advanced* and select *Show description of search parameters*
6. Click *Refresh*.

7. Review the search results and, if selected, the description shown on screen.

This can be used with conditions such as *is equal to*, *starts with*, *is any of*, and *is empty*.

Grouped Summary Options

Grouped View provides a way to summarise search results by grouping records using selected fields. This can assist users when reviewing larger datasets by providing a higher-level view without requiring them to export the results first.

Users can switch between the standard *List View* and *Grouped View* at the top of the search screen. Once *Grouped View* is selected, the required columns can be set up and the grouped results displayed. Grouped searches can also be saved, printed, or exported for reporting.

Local Transactions - STRATAMAX ONLINE HELP 1521

Refresh Export **Grouped**

Restrict To	Field	Condition	Value
Columns	Year	is equal to	Current Year (01/01/2026-31/12/2026) X
Sort Order	Date	is equal to	<input checked="" type="checkbox"/> Specific Dates
Advanced	Account Code	is any of	012, 01301, 01302, 01401, 01402
	Description	contains	

Year is equal to Current Year (01/01/2026-31/12/2026), Account Code is any of 012 or 01301 or 01302 or 01401 or 01402, Sorted By Id Lowest First, Limited to 1,000 records

Local Transactions - STRATAMAX ONLINE HELP 1521

Refresh Export **Grouped**

Restrict To	Available Columns	Displayed Columns
Columns	Filter	Account Code: Grouped
Sort Order	Account Category	Fund Name: Grouped
Advanced	Account Classification	Amount: Sum
	Account Code	
	Account Description	
	Account Group	
	Account Manager	
	Account Type	
	Amount	
	BAS End Date	
	Batch No	
	Building Current Year End	

Year is equal to Current Year (01/01/2026-31/12/2026), Account Code is any of 012 or 01301 or 01302 or 01401 or 01402, Sorted By Id Lowest First, Limited to 1,000 records

Local Transactions - STRATAMAX ONLINE HELP 1521

Refresh Export **Grouped**

Restrict To	Available Columns	Sorted Columns
Columns	Filter	Account Code: A to Z
Sort Order	Fund Name	
Advanced	Amount (Sum)	

Year is equal to Current Year (01/01/2026-31/12/2026), Account Code is any of 012 or 01301 or 01302 or 01401 or 01402, Sorted By Id Lowest First, Limited to 1,000 records

4 records displayed

Account Code	Fund Name	Amount (Sum)
012	Admin Fund	538,260.08
012	Sinking Fund	4,555.73
01301	Admin Fund	5,000.00
01401	Sinking Fund	5.00

Find First Find Next

Saved searches and Dashboard items

Once a search has been set up, it can be saved and used again later. This can be helpful for regular tasks or commonly used reporting requirements.

1. Set up the search using the required tabs.
2. Click *Save Search As* to save the search.
3. To use a saved search again, click *Load/Edit/Delete Search* and select the required search.
4. If a saved search is updated, click *Save Search* to save the changes.
5. If required, click *Add Dashboard Item* to make the saved search available from the Dashboard.

DocMax searches

In **DocMax**, multiple conditions can also be used for the same field in **Advanced Search**. The search will return matching results in the same way, however the description of search parameters is not displayed on screen.

Searches available

Local and Global Debtors

Search Bank Accounts

Search Building Info History

Search Contracts

Search Income Tax

Search Insurance Claims

Search Meetings

Search Payments

Search Roll

Local Transactions

Search Bank Statement History

Search Buildings

Search Creditor Invoice Items

Search Inspections

Search Levies

Search Office Bearers

Search Quotes

Search Work Orders

Global Transactions

Search BAS

Search Contacts

Search Creditors

Search Insurance

*Search Local and Global
Accounts*

Search Pay Employees

Search Recoveries

Organisation - Searches