

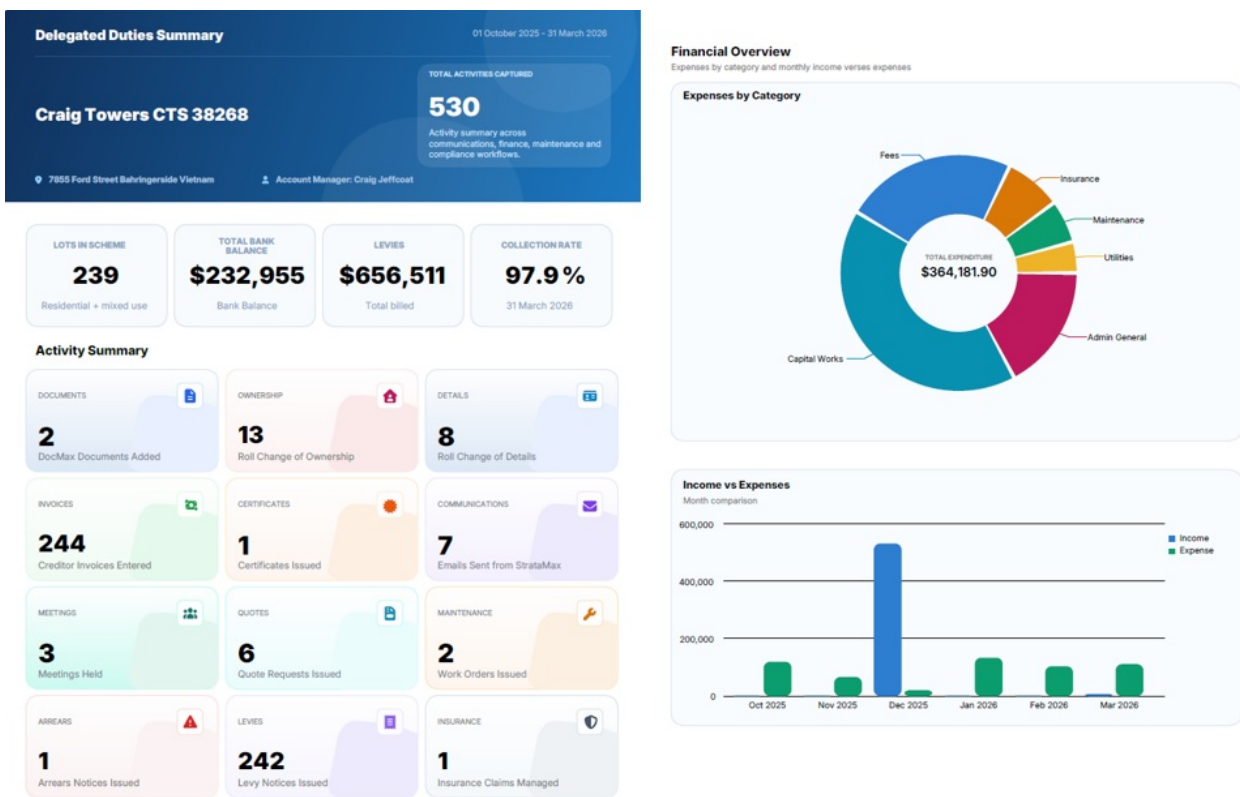
# Activity Report / Annual Summary

Last Modified on 10/04/2026 1:51 pm AEST

The information in this article relates to the setup of the Activity Report/Annual Summary that will be available from all [Report Distribution](#) interfaces such as **Report Sets, Merge Letters** etc in the near future. The report is designed to provide a summary of activities for a specific date range based on key activities within StrataMax; a financial overview is included that will present expenses by category in a pie chart and monthly income and expenditure in a bar chart for the date range set.

The **Activity Report/Annual Summary** has configuration available so that the report can be used for a variety of requirements from legislative needs for NSW delegated function reporting, WA annual reporting and also more generic purposes.

Example report without a letterhead:



Example report with a letterhead:

**A Year in Review**  
**Craig Towers CTS 38268**

7355 Ford Street, Bahringerside, Vietnam | Account Manager: Craig Jeffcoat

01 April 2025 - 31 March 2026  
**TOTAL ACTIVITIES CAPTURED**  
**910**

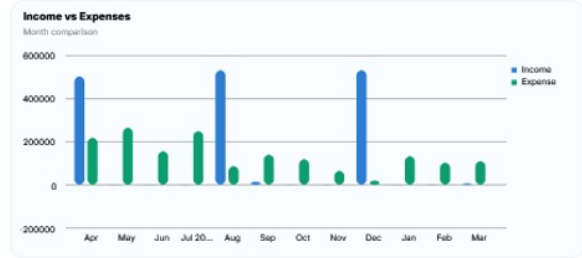
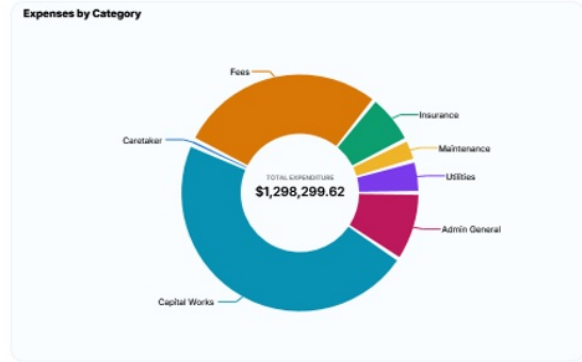
Activity summary across communications, finance, maintenance and compliance workflows.

LOTS IN SCHEME <b>239</b> Residential + mixed use	TOTAL BANK BALANCE <b>\$232,955</b> Bank Balance	LEVIES <b>\$2,061,473</b> Total billed	COLLECTION RATE <b>98.6 %</b> 09 Apr 2026
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**Activity Summary**

<b>2</b> DocMax Documents Added	<b>0</b> Tasks Completed	<b>23</b> Roll Change of Ownership
<b>15</b> Roll Change of Details	<b>608</b> Creditor Invoices Entered	<b>7</b> Emails Sent from StrataMax
<b>3</b> Meetings Held	<b>6</b> Quote Requests Issued	<b>2</b> Work Orders Issued
<b>1</b> Arrears Notices Issued	<b>242</b> Levy Notices Issued	<b>1</b> Insurance Claims Managed

**Financial Overview**  
 Expenses by category and monthly income versus expenses



# Activity Report/Annual Summary Configuration

To access configuration of the Activity Report, add the report to any report distribution screen and select the configuration icon. For regular reporting based on what is setup it is recommended to save the report/s as a Report Set.

Untitled

Simple ⚙️ ?

Building: Craig Towers 38268 ... Accounts: ...

Report Set: [dropdown] [save] [close]  Page Numbers  Consolidate by Contact

**Activity Report/Annual Summary [annualsummary] Annual Summary** ▲ ▼ ⚙️ ✕

+ Report Attachment

Distribution Method

- Post *Microsoft Print to PDF*
- Email *Correspondence* ⚙️
- Save Report
- Use Preferences Correspondence ▾

Recipient Type: Internal Users ▾

Search 🔍 ▶

Filters 📏

<input type="checkbox"/>	Name	Post	Email	Sms
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]
<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]
<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]
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<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]
<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]

Log Proceed Close

✖ Configuration
— □ ×

**Activity Report/Annual Summary**

From Date  ▼

To Date  ▼

Report Title

Expense Summary Setup

**KPI Tiles**

- Recoveries Added
- DocMax Documents Added
- Arrears Notices Sent
- Emails Sent
- Invoices
- Levy Notices Sent
- Meetings Held
- Ownership Changed
- Roll Details Changed
- Certificates Issued
- Work Orders
- Insurance Claims
- Quotes
- Payment Plans
- Debt Collection
- Tasks Completed

**Template**

Use Override Letterhead

Override Letterhead  ▼

Template  ▼

Template (Local Building Override)  ▼

## Activity Report/Annual Summary

**From and To Date** - Set the required Dates. If both are left blank the current financial year will be used.

**Report Title** - Set the required Report Title which is used on the template

**Expense Summary Setup** - Setup the Global Ranges (or Building Override Ranges if required) by following the below steps. These are used for the presentation of expenses by category.

Account Range Setup

Expense Summary

**+ Global Ranges**

Category Name	Range Start	Range Finish
Admin General	120	12705
Maintenance	12706	12900
Caretaker	13010	13905
Insurance	140	15005

**+ Building Override Ranges**

Category Name	Range Start	Range Finish
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Save Close

1. Click Expense Summary Setup
2. Click the green + icon to setup a range of account codes and enter a category name.
3. Select the ... Range Start and select the first account code of the range click *OK*.
4. Select the ... Range Finish and select the last account code of the range click *OK*.
5. Add additional categories and ranges as required.
6. To delete an account code range, click on the red X.
7. Click on Save.

## KPI Tiles

Select the tiles required to be included on the report. The tile on the report will display as a count of the activity based on the date range entered.

Recoveries Added - based on TRMax date

DocMax Documents Added - based on DocMax added date

Arrears Notice Sent - based on the date of arrears notice issued

Emails Sent - based on the date the email is sent from StrataMax

Invoices - based on the date of creditor invoice

Levy Notices Sent - based on the date of levy notice issued

Meetings Held - based on the date of meetings in Meeting Summary

Ownership Changed - based on the date of receipt of notice

Roll Details Changed - based on the date of receipt of notice

Certificates Issued - based on the date certificate issued from StrataMax

Work Orders - based on the date the work order is issued

Insurance Claims - based on the date the insurance claim is lodged

Quotes - based on the date the quote request is sent

Payment Plans - based on the date a lot is entered into Legal Action / Payment Plans

Debt Collection - based on the date a lot is entered into Legal Action  
Tasks Completed - based on completed date of tasks in Task Management

## Template

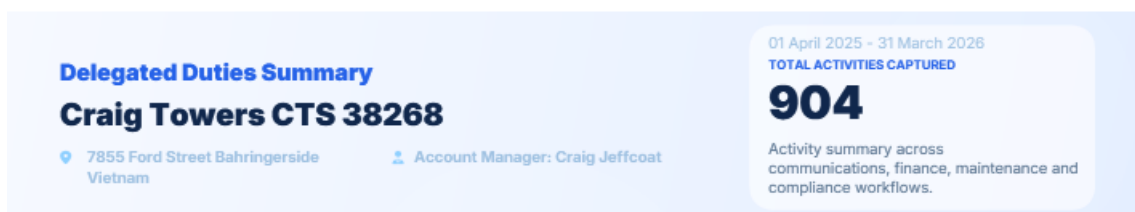
The template used will be based on whether a letterhead is included or not.

Letterhead included:

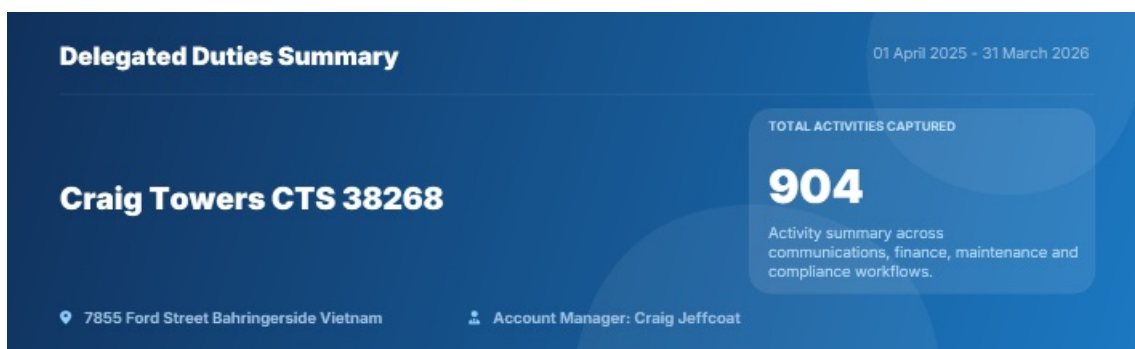


t: 07 5575 7422  
f: 07 5501 7087  
accounts@stratamax.com  
www.stratamax.com

PO Box 7110, GCMC  
Bundall, Qld 9726  
StrataMax Pty Ltd  
ABN 62 096 505 949



Letterhead Override set to blank:



## FAQ

**Q.** Are additional reports available to provide more information for specific KPI tiles?

**A.** Yes the below reports are available from report distribution menus that would be suitable. It is recommended to save a report set including the required reports and the date range entered in the configuration for the Activity Report/Annual Summary will be used on all reports.

- Meetings
- Arrears Issued
- Legal Action (Building Status)
- Payment Plan (Building Status)
- Work Orders (Building)
- Work Quotes (Building)

**Q.** We use external applications/systems such as Outlook and ResVu that we would like to include information from; can this be included on the Activity Report/Annual Statement?

**A.** External information can be included within a merge letter that may form part of the report set or separately be attached by clicking on *Attachment* and adding any additional reports you may require.

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