

# Activity Report/ Annual Summary

Last Modified on 03/06/2026 2:09 pm AEST

The information in this article relates to the setup of the Activity Report/Annual Summary, which is available from all [Report Distribution](#) interfaces, such as [Report Sets](#) or [Merge Letters](#), available in version 5.6.154

This report consolidates key operational data captured in StrataMax—such as communications, financial processing, compliance actions, and service delivery—into a single, structured view. It allows information to be presented by category in a pie chart and by month for income and expenditure in a bar chart for the date range. It also allows other supporting reports and documents to be added, with the option to save as a *Report Set* for regular use.

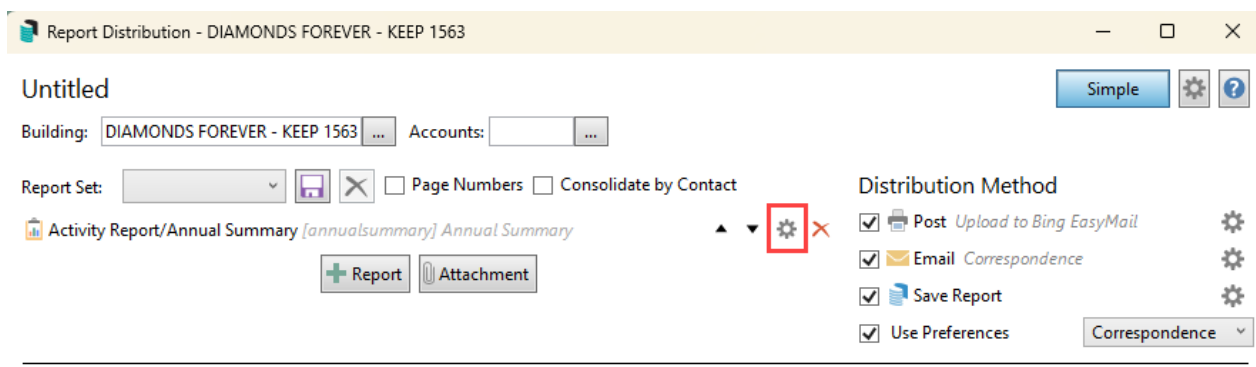
The report aligns with the intent of existing state-specific legislative reporting, such as NSW delegated function reporting and WA annual reporting, as well as for more generic purposes. By using charts and visual summaries, the report makes it easier to interpret activity levels, identify trends, and explain management workload to committees and owners.

Where flexibility is required, activity counts can also be made available as merge fields, enabling clients or internal users to build customised reports and combine these metrics with additional reporting outputs as needed.

The alternative reporting option is the **Status Report**, which can be customised by adding a title that reflects the type of report being produced; instructions are also available below.

## Configuration

To access the Activity Report configuration, add the report to any **Report Distribution** screen and select the configuration icon. For regular reporting as set up, it is recommended to save the report(s) as a *Report Set*.



1. From the cogwheel settings:

**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* used in the template.

## Email Template Setup

The email template available from *Email Template Manager* is titled "*Building Annual Summary*". The <<Report Name>> merge field will display the report set description.

## Save Report

The *Save Report* option allows for a *DocMax* profile (which includes the Online Portal upload) to be set when using this report set, and will save this to *DocMax* and *Stored Reports*.

## Expense Summary Setup

Set up the *Global Ranges* (or *Building Override Ranges* if required) by following the steps below. These are used to present *Expenses by Category* within the *Financial Overview* area.

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

1. Click *Expense Summary Setup*.
2. Click the green + icon to set up a range of account codes and enter a category name.
3. Select the ... Range Start and select the first account code of the range, and click *OK*.
4. Select the ... Range Finish, then select the last account code in the range, and 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 in the report. The tile in the report will display the count of activity for the entered date range.

- Recoveries Added - based on TRMax date.
- DocMax Documents Added - based on the DocMax added date.
- Arrears Notice Sent - based on the date of the arrears notice issued.
- Emails Sent - based on the date the email is sent from StrataMax.
- Invoices - based on the date of the creditor invoice.
- Levy Notices Sent - based on the date of the levy notice issued.
- Meetings Held - based on the date of meetings in the 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 the certificate was issued by 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 the completed date of tasks in Task Management.

Configuration

**Activity Report/Annual Summary**

From Date: 01/04/2025

To Date: 31/03/2026

Report Title: Delegated Duties Summary

Expense Summary Setup: 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: bodycorp Letterhead

Template: annualsummary Annual Summary (Letterhead)

Template (Local Building Override): Use Global

Close

## Examples and Letterhead

Example report without a letterhead:

**Delegated Duties Summary** 01 October 2025 - 31 March 2026

**Craig Towers CTS 38268**

7855 Ford Street Bahringerside Vietnam | Account Manager: Craig Jeffcoat

**TOTAL ACTIVITIES CAPTURED**  
**530**  
Activity summary across communications, finance, maintenance and compliance workflows.

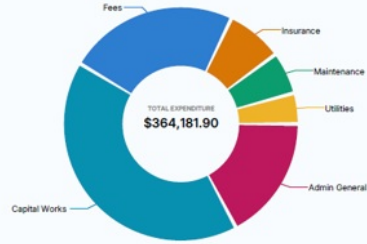
LOTS IN SCHEME <b>239</b> Residential + mixed use	TOTAL BANK BALANCE <b>\$232,955</b> Bank Balance	LEVIES <b>\$656,511</b> Total billed	COLLECTION RATE <b>97.9 %</b> 31 March 2026
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**Activity Summary**

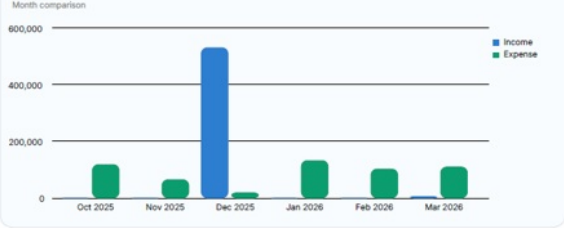
<b>2</b> DocMax Documents Added	<b>13</b> Roll Change of Ownership	<b>8</b> Roll Change of Details
<b>244</b> Creditor Invoices Entered	<b>1</b> Certificates Issued	<b>7</b> Emails Sent from StrataMax
<b>3</b> Meetings Held	<b>6</b> Quote Requests Issued	<b>2</b> Work Orders Issued
<b>1</b> Arrears Notices Issued	<b>242</b> Levy Notices Issued	<b>1</b> Insurance Claims Managed

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

**Expenses by Category**



**Income vs Expenses**



**Example report with a letterhead:**



© 07 5575 7433  
P 07 5501 7987  
accounts@stratamax.com  
www.stratamax.com

PO Box 7110, GCMC  
Surrey, Vic 3126  
StrataMax Pty Ltd  
ABN 62 066 502 940

**A Year in Review** 01 April 2025 - 31 March 2026

**Craig Towers CTS 38268**

7855 Ford Street Bahringerside Vietnam | Account Manager: Craig Jeffcoat

**TOTAL ACTIVITIES CAPTURED**  
**910**  
Activity summary across communications, finance, maintenance and compliance workflows.

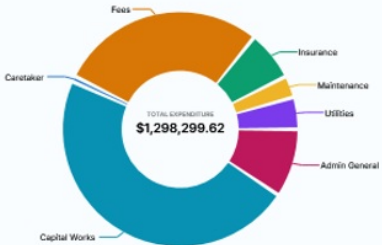
LOTS IN SCHEME <b>239</b> Residential + mixed use	TOTAL BANK BALANCE <b>\$232,955</b> Bank Balance	LEVIES <b>\$2,061,473</b> Total billed	COLLECTION RATE <b>98.6 %</b> 09 Apr 2026
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**Activity Summary**

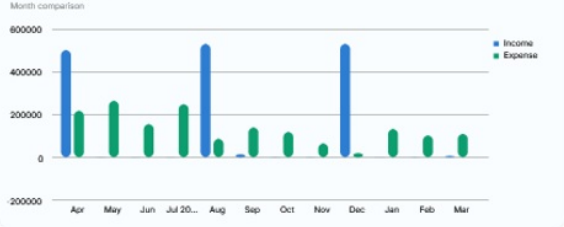
<b>2</b> DocMax Documents Added	<b>0</b> Tasks Completed	<b>23</b> Roll Change of Ownership
<b>15</b> Roll Change of Details	<b>608</b> Creditor Invoices Entered	<b>7</b> Emails Sent from StrataMax
<b>3</b> Meetings Held	<b>6</b> Quote Requests Issued	<b>2</b> Work Orders Issued
<b>1</b> Arrears Notices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

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

**Expenses by Category**



**Income vs Expenses**



**Letterhead**

The template used will depend on whether the letterhead is included and is set in the cogwheel within the Activity Report/Annual Report area.

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

**Delegated Duties Summary**  
**Craig Towers CTS 38268**

7855 Ford Street Bahringside Vietnam      Account Manager: Craig Jeffcoat

01 April 2025 - 31 March 2026  
**TOTAL ACTIVITIES CAPTURED**  
**904**

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

Letterhead Override set to blank:

**Delegated Duties Summary** 01 April 2025 - 31 March 2026

**Craig Towers CTS 38268**

7855 Ford Street Bahringside Vietnam      Account Manager: Craig Jeffcoat

**TOTAL ACTIVITIES CAPTURED**  
**904**

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

## FAQ

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

**A.** Yes, the reports below are available from the 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.

**Q.** The DocMax Documents Added area does not seem to match the total number of documents for the selected building. Why is that?

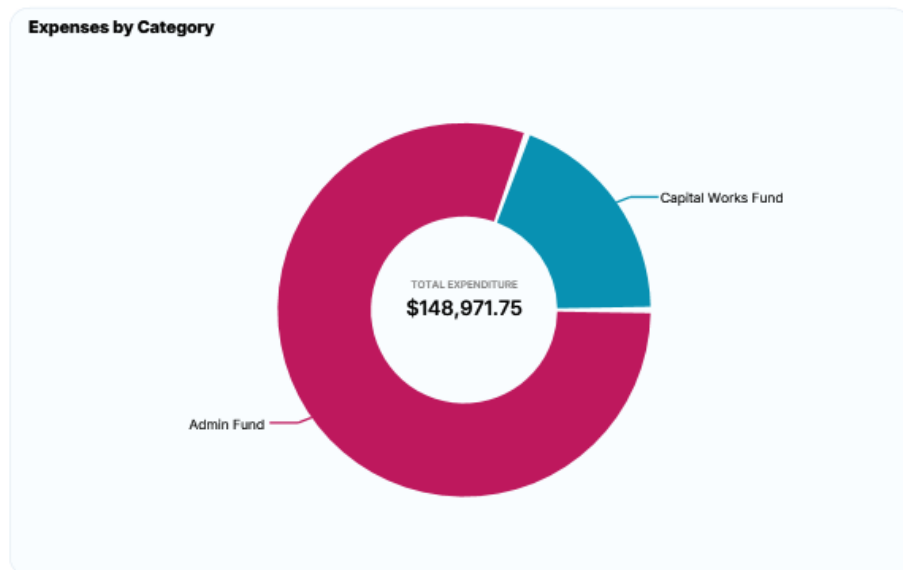
**A.** Documents that have been added to **DocMax** are included in the count, and do not include any StrataMax Report/ Document.

**Q.** We have not setup account code categories & ranges however want to use this report, is there a template without the graphs?

**A.** There is no templates available without the graphs, it is recommended to setup two account ranges. One for each trading fund, for example Admin Fund 120 to 189 and Capital Works Fund 220 to 289.

### Financial Overview

Expenses by category and monthly income versus expenses



## Status Report

The Status Report instructions below offer an alternative for Managers to meet specific state legislative requirements, such as Section 55 of the NSW Strata Legislation. If disbursements are configured for recording, TRMax provides reports that can be generated for a chosen date range. These reports can include manually entered recoveries and work alongside the Status Report. You can also customise the Status Report by adding a title that reflects the type of report being produced.

## Creating the Status Report

1. Search or select **Report Set** (using Report Distribution).
2. Click **+ Report** to add the Status Report.
  - o Repeat for TRMax Recovery. Click the cogwheel to set a particular invoice code/operator for reporting. If not set, all are included.
  - o Repeat for TRMax Consultancy.
  - o Repeat for Arrears Issued.
  - o Repeat for Legal Action (Building Status).
  - o Repeat for Payment Plan Report.
  - o Repeat for Meetings.
3. If there are any further reports to include, click **+Report** to add them, and if it's an attachment, click



In addition to reporting from TRMax, [searches](#) can be used to report to excel &/or be saved as a Dashboard for quick reference. Some examples are provided below:



Search Insurance Claims - Craig Keep 354235

Refresh Export Advanced Saved Search: Insurance Claims Lodged

Field Condition Value

Current Building

Date Lodged is on or after Specific Dates 1 Year in the past

2 records displayed

Building Number	Incident Date	Claim Number	Reference Name	Date Lodged	Insurer	Insurance Code	Insurers Reference	Insurance Type	Insurance Policy Number	Amount Claimed
354235	30/09/2024	00000002	ROLLER DOOR DAMA	01/10/2024		901		BUILDING		
354235	01/03/2024	00000001	STORM DAMAGE	03/04/2024		901		BUILDING		

Search Payments - Craig Keep 354235

Refresh Export Advanced Saved Search: Payments Made

Field Condition Value

Current Building

Date is on or after Specific Dates 1 Year in the past

5 records displayed

Date	Account Code	Payee Name	Amount	Reference	Building Number	Building Name
30/04/2024	08200040	JEAN CECCHINATO	2.00	F0000005	354235	Craig Keep
22/04/2024	08200413	Craig	51.00	F0000001	354235	Craig Keep
22/04/2024	08200413	Craig	11.00	F0000003	354235	Craig Keep
22/04/2024	08200413	Craig	10.00	F0000002	354235	Craig Keep
08/04/2024	02100001	Craig Jeffcoat	144.00	F0000004	354235	Craig Keep

Search Meetings - Craig Keep 354235

Refresh Export Advanced Saved Search: Meetings Held

Field Condition Value

Current Building

Meeting Date is on or after Specific Dates 1 Year in the past

3 records displayed

Building Number	Building Name	Account Manager	Meeting Type	Meeting Date	Timezone	Location	Comments	Notice Sent E	Nominatio
354235	Craig Keep		Committee	14/05/2024 12:00 AM					
354235	Craig Keep		Committee	04/09/2024 12:00 AM					
354235	Craig Keep		Annual General	04/10/2024 12:00 AM					

Search Logs

Refresh Export Advanced Saved Search: Invoices Submitted for Approval

Field Condition Value

Current Building

Category is equal to InvoiceHub

Date/Time is on or after Specific Dates 1 Year in the past

Description contains Submitted

7 records displayed

Date/Time	Log Lev	Username	Description	Building	Category
31/10/2024 2:37:28 PM	Info	craig.jeffcoat	Submitted invoice '654' to the Invoice Hub	354235	InvoiceHub
31/10/2024 2:34:57 PM	Info	craig.jeffcoat	Submitted invoice '46' to the Invoice Hub	354235	InvoiceHub
29/10/2024 8:49:37 AM	Info	craig.jeffcoat	Submitted invoice '31' to the Invoice Hub	354235	InvoiceHub
29/10/2024 8:48:25 AM	Info	craig.jeffcoat	Submitted invoice '31' to the Invoice Hub	354235	InvoiceHub
29/10/2024 8:37:58 AM	Info	craig.jeffcoat	Submitted invoice '31' to the Invoice Hub	354235	InvoiceHub
29/10/2024 8:32:30 AM	Info	craig.jeffcoat	Submitted invoice '31' to the Invoice Hub	354235	InvoiceHub
29/10/2024 8:30:33 AM	Info	craig.jeffcoat	Submitted invoice '31' to the Invoice Hub	354235	InvoiceHub

Search Roll - CRAIG KEEP 56656

Refresh Export Advanced

Field	Condition	Value
Current Building		
Roll Position	is equal to	Owner
Ownership Change Type	is equal to	Transfer
Owner Acquired Date	is on or after	<input type="checkbox"/> Specific Dates 1 Year in the past
Priority Order	is equal to	0

2 records displayed

Find First Find Next

Roll Position	Reference Name	Contact Title	Lot Number	Unit Number	Debtor Account Code
Owner	test test	test test	1	1	02100001
Owner	Smith and James Company	Smith and James Company	4	4	02100004