BMC Creation and Setup

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This article covers the topics of setting up Building Management Committees (BMC) and Shared Facilities.

BMC Setup & Billing Video

If you would prefer to watch our video on BMC, please see theBMC Setup & Billing Video.

Before BMC/BMS Setup

Before creating a BMC for the first time, there are a few tasks that Strata Managers should complete before starting the creation of the actual BMC building in StrataMax.

1. If this is a brand-new BMC, which hasn't been run as a building previously, then it is highly recommended to request a bank account before anything else. Technically the bank account can be requested either *before* or *after* the BMC has been created in StrataMax, but we strongly doing this before anything else. For SCM clients, please refer to the *StrataCash Accounts article* for more information.
2. If the BMC is or is going to be GST registered, it is recommended to complete or at least lodge the registration with the ABR as soon as possible. This is because the BMC will need to be configured as such in StrataMax so that it can allocate GST to any transactions that occur. Also, because the BMC needs to be set up as a creditor in those buildings that form part of the BMC and are managed in StrataMax. StrataMax has built-in validation for GST registration with the ABR, and it cannot be overridden, so if the registration is not completed with the ABR, the BMC will not be able to be set up as a creditor, and the billing will not be able to be processed.
3. It is necessary to add the general ledger/expense codes to StrataMax. These codes will be determined by the Building Management Statement. To learn about creating a new account code in StrataMax, please see ***Account Maintenance***. Depending on how the BMC financial statements are going to be presented, the expense codes can be set up in two ways:
    - In each building, create an expense code for each BMC expense item that it is liable for. The financial statement will present each BMC costs from the individual building costs. For example, in each of the buildings create the codes *12701 Cleaning* and *127011 BMC Cleaning*.
    - Create one general code in each of the buildings called (for example) 'BMC Expenses' or 'BMC

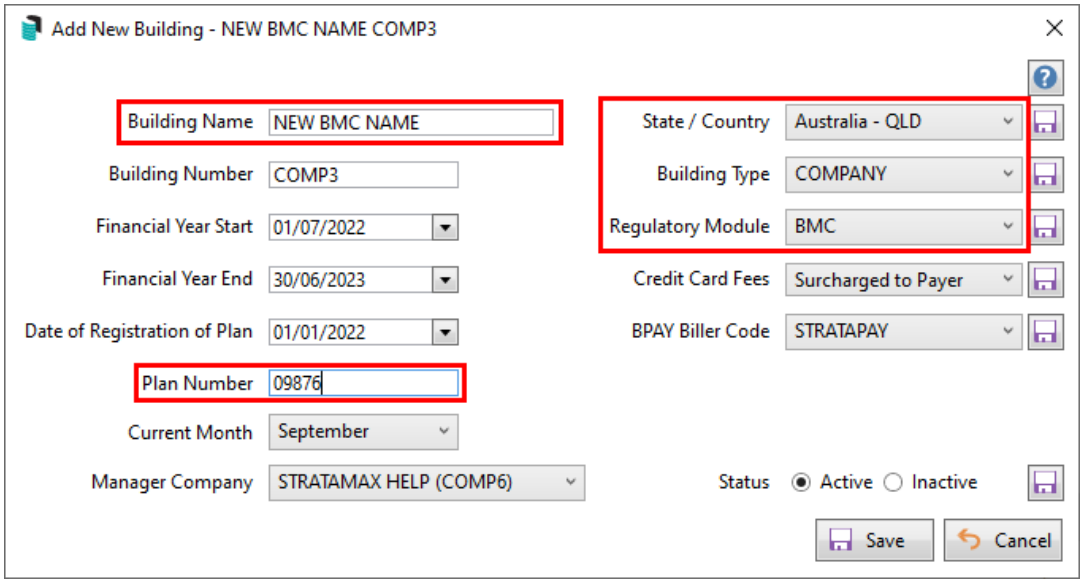
Contributions' and combine all the BMC expenses into one general expense code. Note that this will display a combined total amount on the building's financial statement and a general ledger report will need to be run in order to identify each transaction.

A BMC should run as a balanced account, therefore no surplus or deficit should exist. If the BMC was run previously as a building, all surplus or deficits need to be addressed prior to creating the BMC. If the BMC is changed from a building to a BMC part way through a year, there may be a surplus or deficit as StrataMax will not see these transactions at the year-end calculations.

1. Create the BMC

Create the BMC in StrataMax at the beginning of the financial year of the BMC.

1. Search or select ***New Building (BC Max)***. This can be done from within any building.
2. Populate and change each field:
    - Type in the *Building Name* field of the BMC.
    - Check the *State / Country.*
    - Change the *Building Type* drop-down to 'COMPANY' and then the *Building Number* field will be automatically generated with 'COMP#' with the next company number available.
    - Change the *Regulatory Module* to 'BMC'.
    - Enter the *Plan Number.*
    - Change the remaining fields to suit your requirements.
    - Ensure the *Status* is 'Active'.
3. Click *Save*.

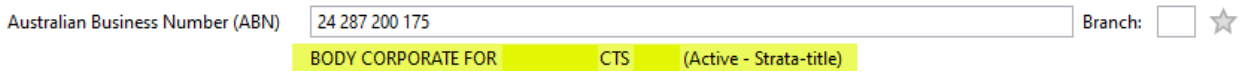


2. Enter Building Information

Below is the minimum amount of information that any building in StrataMax should contain. This information is added in ***Building Information***. For more information, please refer to the ***Building Information*** *article*.

> Some of the below details may have already been populated, but it's a good idea to check that they're correct.

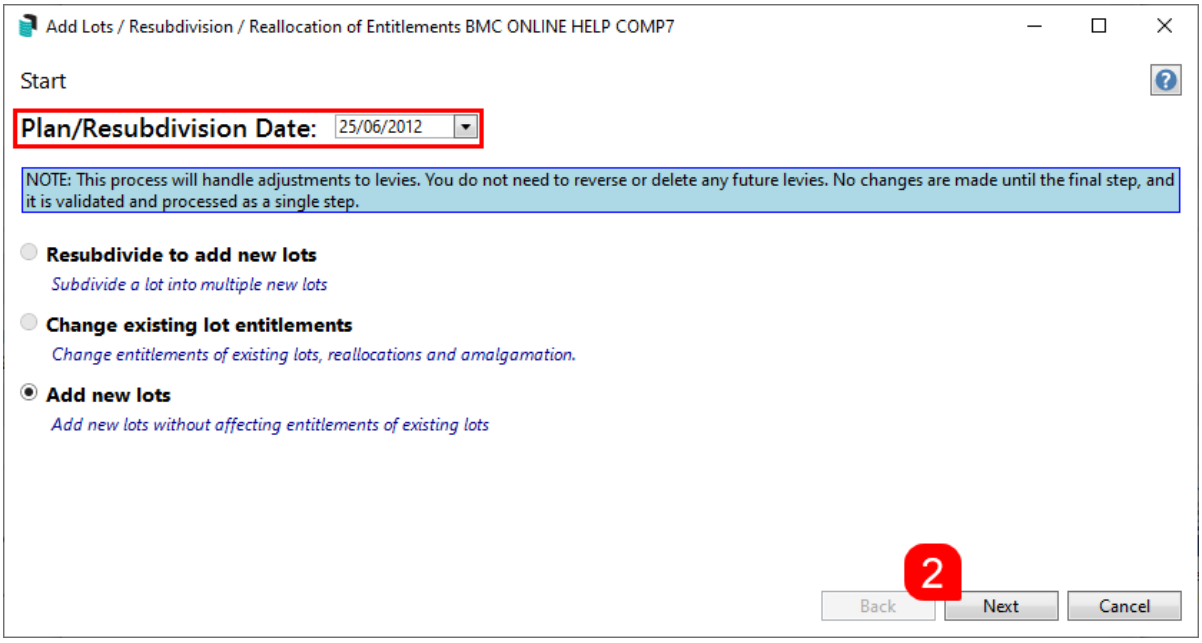
- Plan No.
- Registration details / date.
- Regulatory Module.
- Account Manager.
- Address (Suburb, State & Postcode).
- Number of Lots (Active Lots field will be updated during the creation of the roll).
- Total Contribution Entitlements (Lot Liability VIC).
- Biller Code: Enter 'STRATAPAY' if you are using the StrataPay deposit slip on levy notices.
- Credit Card Fees to Building - this field may be hidden, use StrataPay Card Accepted.
- Australian Business Number (ABN) and GST Registration. In order to avoid any mistakes and spending time and effort fixing mistakes, it is critical that this section is populated and configured correctly before any transactions are processed in the BMC. We strongly recommend reviewing *ABN, GST Registration and BAS* very carefully.
    - Check the ABN matches the building name & details being setup.
    - Registered for BAS/IAS (GST): Tick for Yes or leave blank for No. It's important to enter the GST status during setup, as ***Opening Balance Setup*** does not calculate GST when processed.
    - Set BAS information: Full or Simple and Quarterly as required and ensure the ATO Creditor is selected.
    - Don't Prepare BAS on or before: Enter date for the BAS to calculate after.



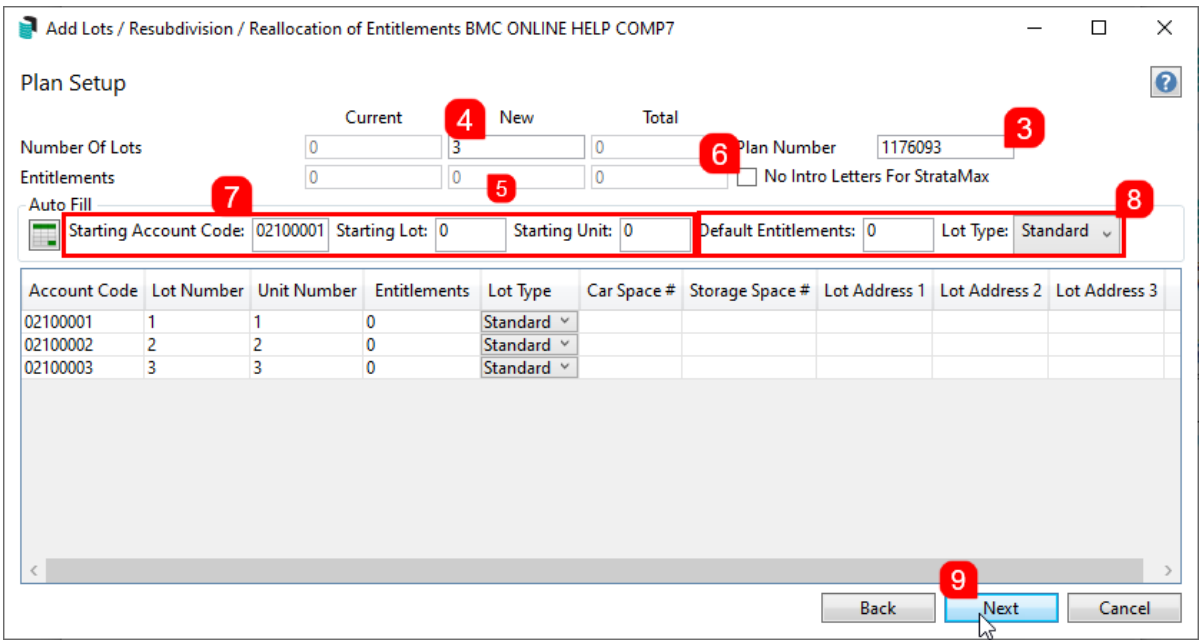
3. Create the Lots (Buildings that form the BMC)

In StrataMax the lots represent the buildings that form the BMC.

1. Search or select ***Roll***, and the ***Resubdivision / Reallocate*** screen should appear.
2. Check that the *Plan/Resubdivision Date* is correct and click *Next*.

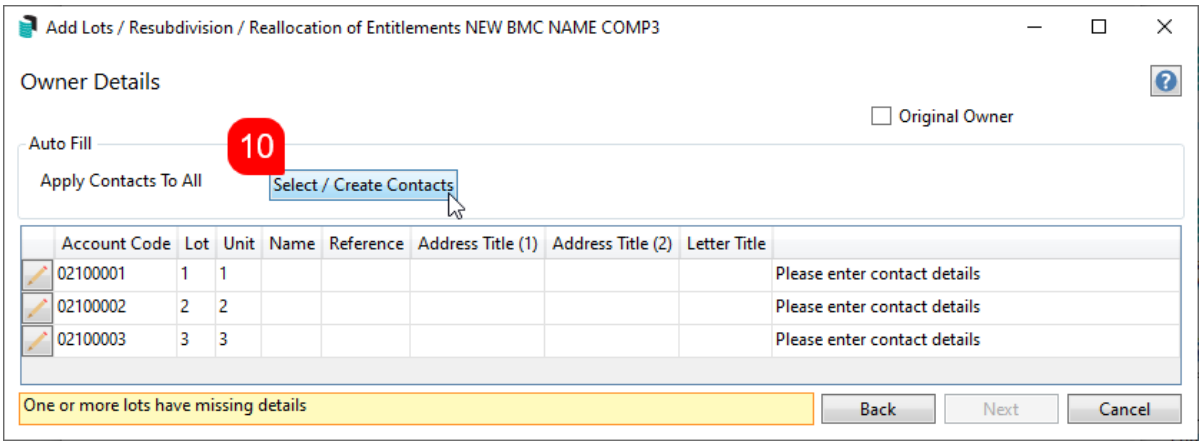


3. In the *Plan Setup* screen, check that the new *Plan number* is correct.
4. Enter *Number of New Lots.*
5. The *Entitlements* field should be blank.
6. Tick *No Intro Letter for StrataMax.*
7. *Starting Account Code, Starting Lot* and *Starting Unit* should be left as default.
8. *Default Entitlements* should already be zero, and *Lot Type* should be left as 'Standard'.
9. The data in the table shouldn't need to be changed in this instance, so click *Next.*



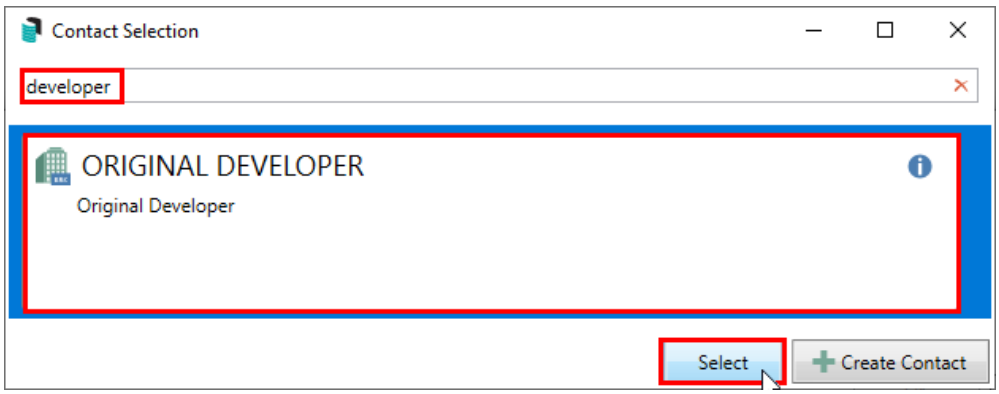
10. In the 'Owner Details' screen, in the 'Auto Fill' section, click the *Select / Create Contacts* button next

to 'Apply Contacts To All' to enter a contact for all of the lots that represents each plan/building that forms the BMC.

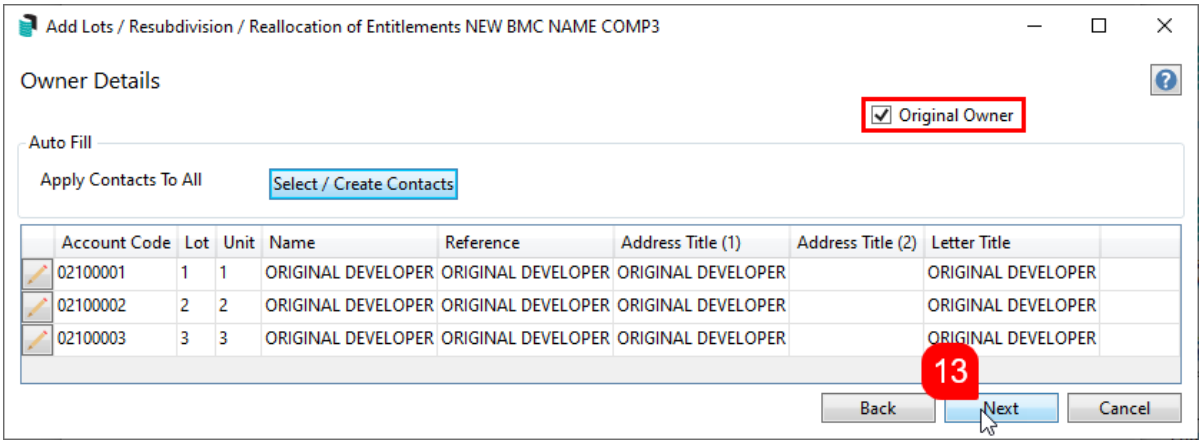


11. In the 'Enter Contacts' screen you can either:
    - Click *Create Contact* to create a brand new contact called "Original Developer" or the developer company name if known. To learn how to create a new company contact, see *Create Contact | Company.*

      OR
    - Click *Select Contact* to choose an existing contact. Search for the contact using the *Search* field at the top, then simply click the contact so it's highlighted in blue, then click the *Select* button.



12. In the 'Enter Contacts' screen you will see the selected contact, so you can click*OK* to return to the 'Owner Details' screen where each lot will now have the selected contact details entered for each lot.
13. Tick the *Original Owner* box, then click *Next.*



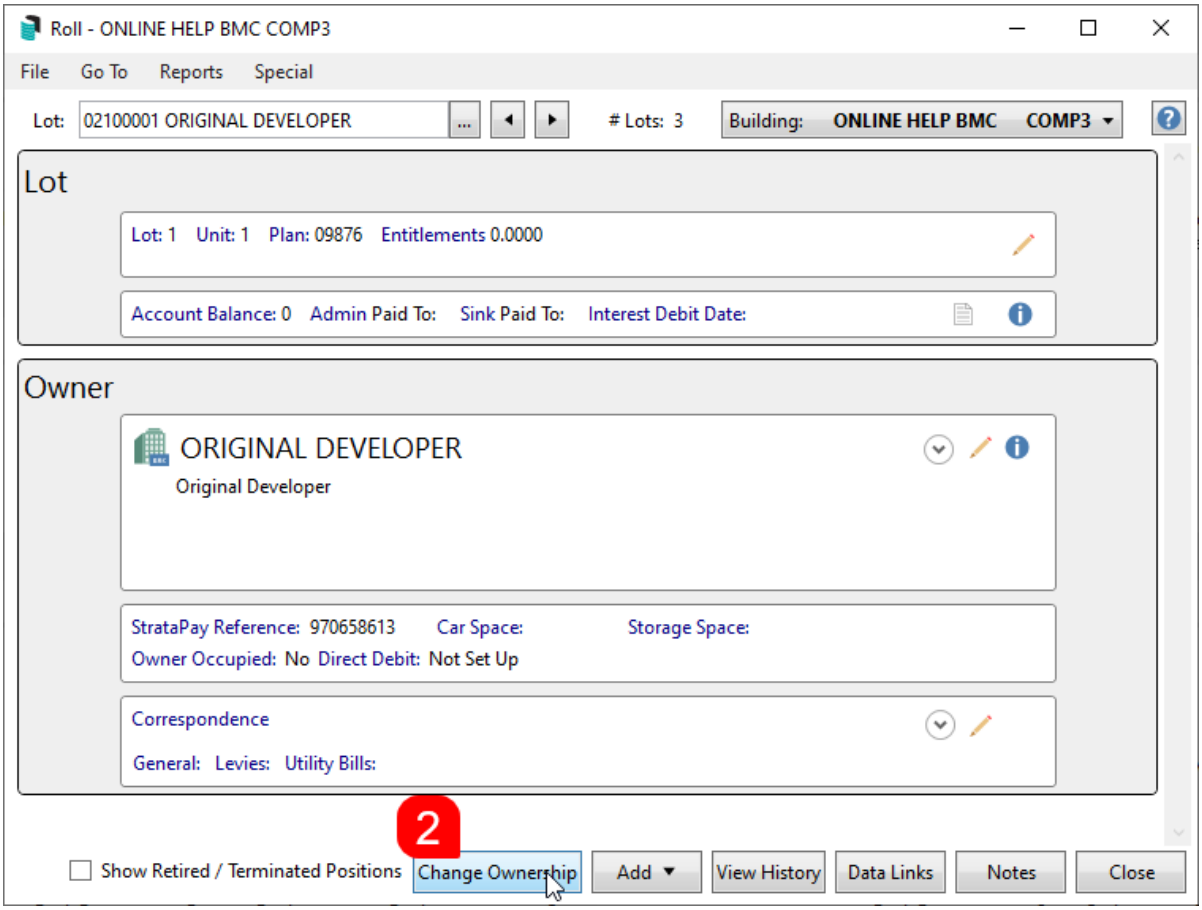
14. The 'Finalise' screen will appear then click *Finish.*

15. Click *OK* when the 'Add Lots' confirmation appears, and the 'Account Code List' screen will appear for you to select a lot. Proceed below to section 4. to update the lots with building information.

4. Update Lots with Building Information

Once the lots have been created as per section 3. above, they will each need to be updated with their building details.

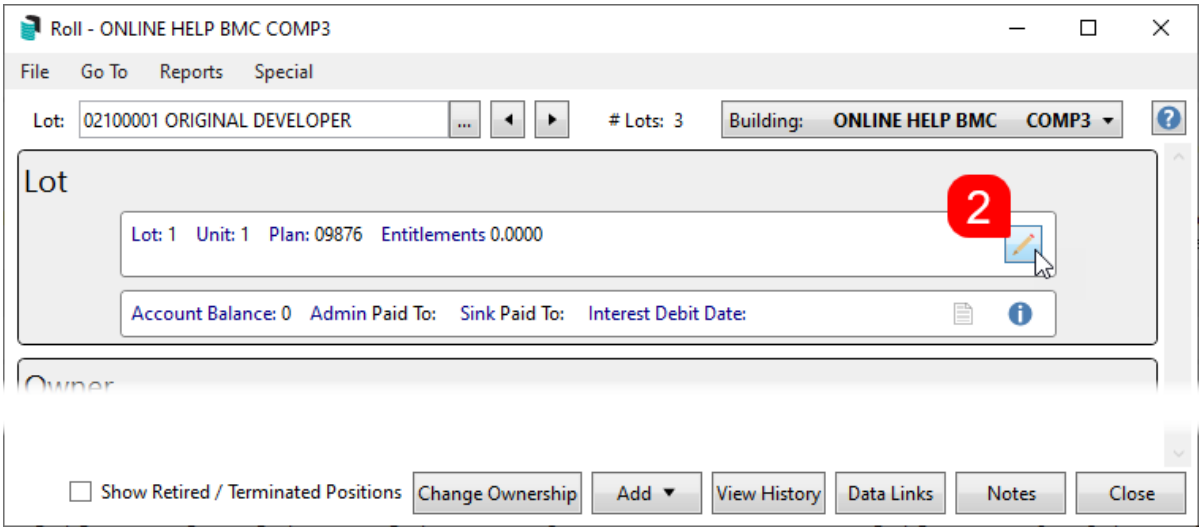
1. If you're continuing from the last step in section 3. above, the 'Account Code List' screen should be on screen. Otherwise, search or select ***Roll*** for the 'Account Code List' screen to appear. Select the first lot in the list and click *OK*.
2. Click the *Change of Ownership* button at the bottom of the screen and follow the *Change of Ownership* instructions to enter all the appropriate details for each building, such as their address, phone numbers, and email address.



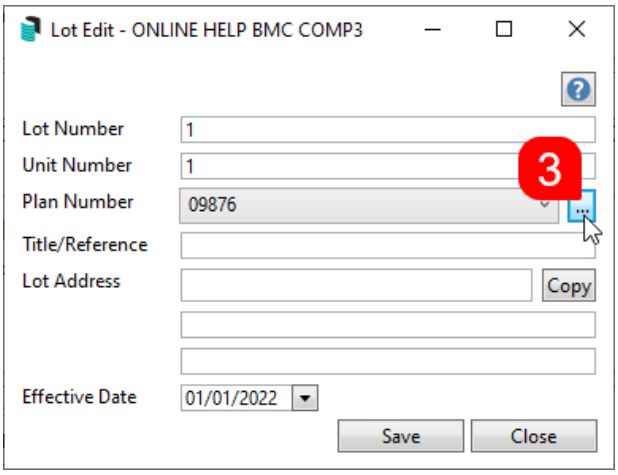
5. Associate Lots with Buildings

Once all lots have completed their change of ownership with their correct Contacts, the lots need to be associated with their respective buildings in StrataMax. Regardless of whether a building that is part of the BMC is managed in your StrataMax portfolio or by another management company, this part of the setup is still required.

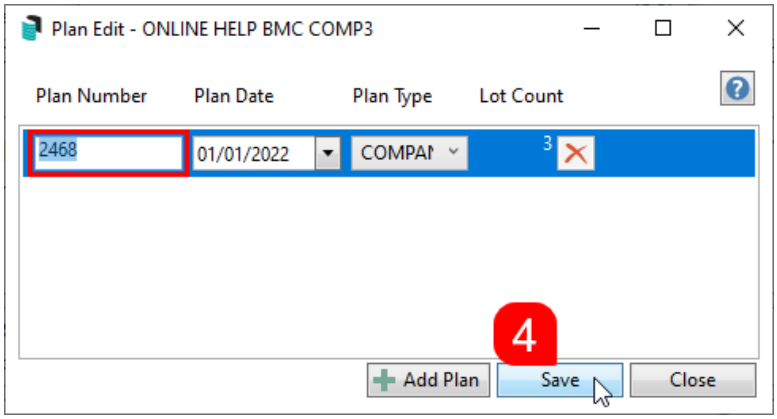
1. Search or select ***Roll*** for the 'Account Code List' screen to appear. Select the first lot in the list, and click *OK*.
2. In the 'Lot' section, click the *Pencil (Edit)* button.



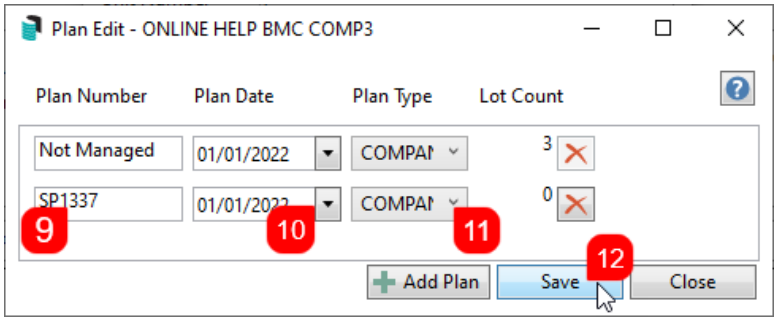
3. In the 'Lot Edit' window, click the ellipsis button *[...]*.



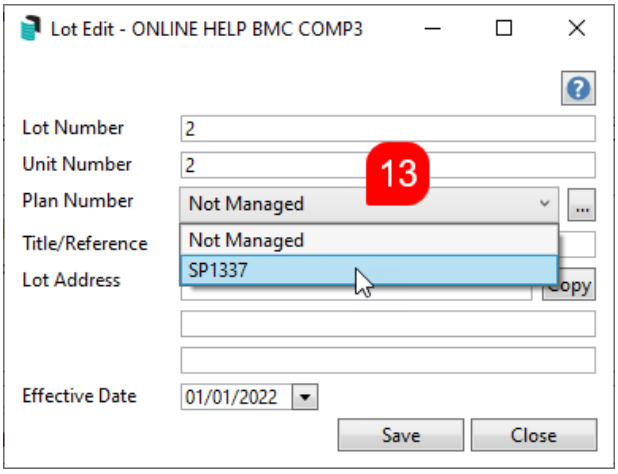
4. In the 'Plan Edit' window, if this building is managed in your StrataMax portfolio, manually change the *Plan Number* field to the same number as the associated building.
    - If it is not managed in your StrataMax portfolio then this field needs eight characters consisting of the building's number and spaces and then 'NotManaged'. For example, *12345678NotManaged* or *12345 NotManaged* (three spaces between the number and 'NotManaged'). Note that the words 'NotManaged' must be written exactly like with without spaces. If this is not done correctly, then the billing process cannot be completed.
    - Click *Save* when done.



5. Then back in the 'Lot Edit' window, click *Save* to close the window and return to the ***Roll*** screen.
6. Proceed to the next lot (building of the BMC) and click the *Pencil (Edit)* button.
7. In the 'Lot Edit' window, click the ellipsis button *[...]*.
8. In the 'Plan Edit' window, click the *Add Plan* button to add another row for another plan number.
9. Enter the *Plan Date* (can be typed or selected from in the calendar drop-down).
10. Click the *Plan Type* drop-down menu and select 'COMPANY'.
11. Click *Save* when done.



12. Back in the 'Lot Edit' window, click the *Plan Number* drop-down menu and select the new plan you just created.



13. Click *Save* to close the window and return to the ***Roll*** screen.
14. Move on to the next lot (building of the BMC) and repeat from step 6. onwards until all lots have either correct plan number (if managed in your StrataMax portfolio), or "Not Managed" in the *Plan* field.

> The lot / building that is not managed in your StrataMax portfolio will sometimes appear in various menus, screens, and reports with the words 'Not Managed' behind or next to it.

6. Enter the Bank Account Details

If this BMC was not previously run as a building in the portfolio, and a bank account was requested, the bank account details can now be entered into StrataMax, provided the bank account confirmation has been received from the StrataCash team. Please refer to the ***Bank Account Setup*** *article* to learn how this is done.

7. Enter the BMC/BMS Budget

The BMC's budget, which is entered into the ***Budget Update*** screen, forms part of the equation that determines how much each of the buildings pay over the year. It is the *amounts entered into the expense accounts,* which will be added in the next step, when the percentage liability is set up. Income accounts should not be included and only expense accounts are required for the Budget.

A BMC does not have a Sinking/Maintenance/Cap Works Fund and does not save money for any major works. It is up to each of the buildings that are a member of the BMC, to have a contingency for any type of major works that may be required in the future.

Please read the ***Budget Update*** *article* to learn about entering the budget. The process is no different from any other building - just remember that there is no need to enter any figures in the

Sinking/Maintenance/Cap Works Fund.

8. Set up the Percentage Liability

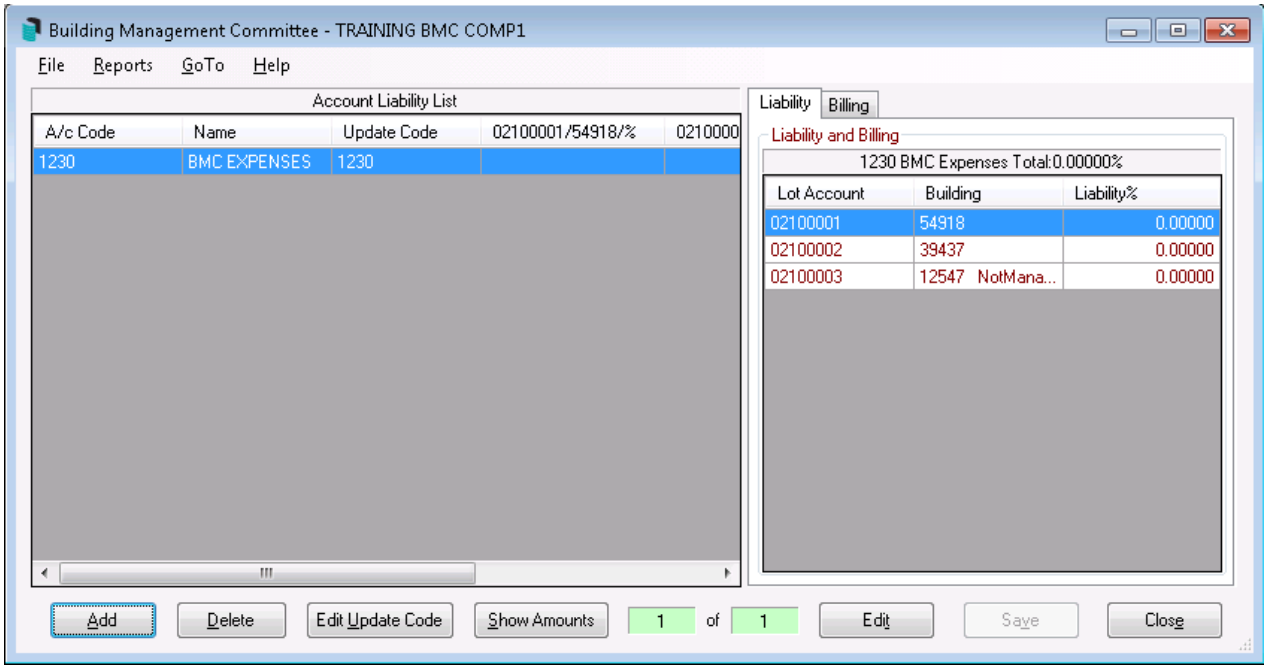
The proportional liability, or percentage share of each linked building that forms the BMC would be noted in the BMC Document - the proportion of the expense that each member would be responsible for. This percentage share is then entered into the *Account Liability List*, which are the expense codes that were entered in the previous step, in the ***Budget Update*** screen. This percentage share will only need to set up once.

Each Proportional Liability percentage can change for each type of expense. For example, the percentage a member is liable for, for the car park expense could be different to the expense for the cleaning of the pool.

> Do NOT use income codes when entering the Update Codes in the below process. If you do, it will create credits on the BMC invoices.

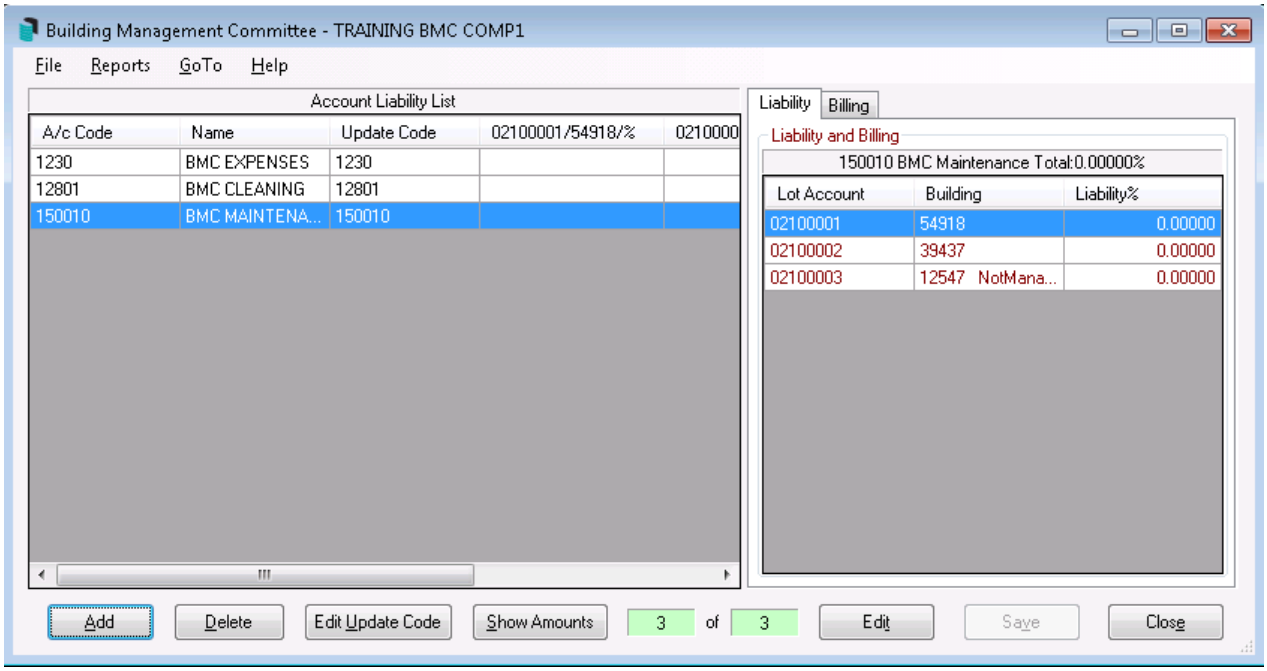
1. Search or select ***BMC***.
2. Click the *Add* button in the bottom left.
3. Select the appropriate code, then click *OK*.
4. Select the *Expense Code* as the *Update Code*, which will be used in any linked building and click *OK*.
    - This can be the same account code used in the BMC or an*expense code* within that building. Make sure that the code used exists in each scheme, as well as the BMC. This ensures that budget export will export correctly. Do NOT use an income code in the building as this will create credits on the BMC invoices when billing is processed.

Example A
The *Expense Code* is *1230 BMC Expenses*. Any BMC expenses will show as a single expense on the Financial Statements for any buildings that form part of this BMC and are managed in StrataMax.

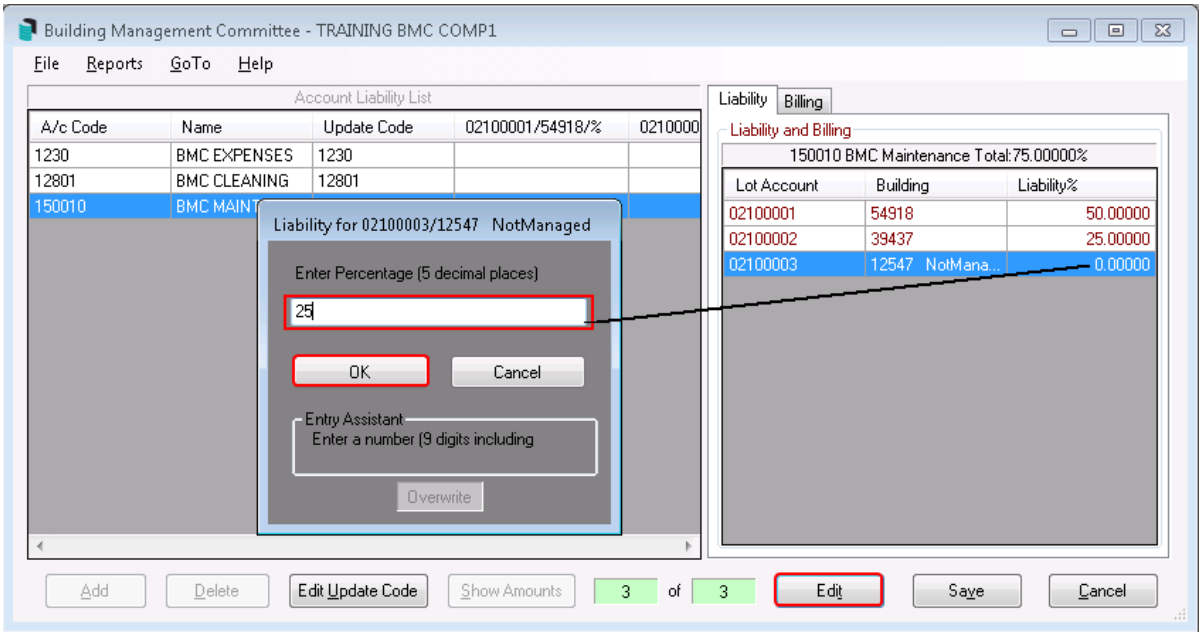


Example B

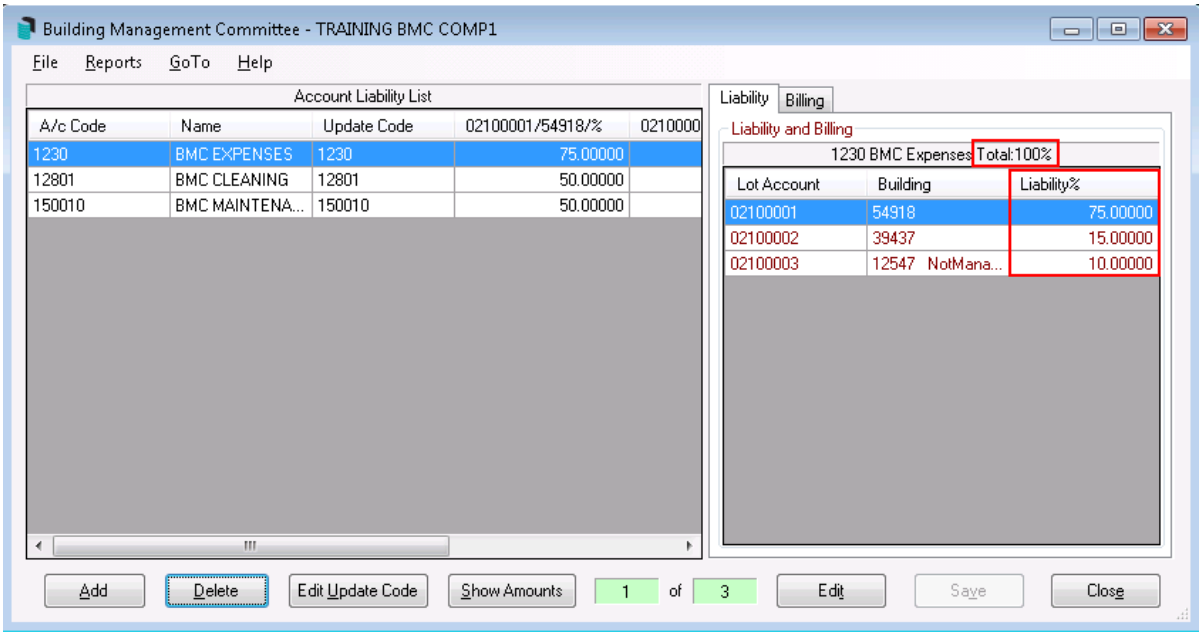
The *Update Code* is set to individual expense codes in each Strata Plan. The BMC expenses will show on the buildings financial's for any buildings that form part of this BMC and managed.



5. Once all expense codes have been added, the proportional liability for the selected expense can be entered.
6. Highlight an expense code and click *Edit.*



7. Enter the percentage liability for the highlighted plan in this box. The percentage can be up to 5 decimal places, then click *OK*.
8. The second member will be highlighted automatically. Click*Edit* again and enter the liability for the second member for this expense.
9. Repeat for all buildings until the total of the percentage totals 100%.



10. Click *Save*.
11. Repeat the above steps for each expense code.

9. Set up the BMC as Creditor

A new creditor code needs to be set up for BMC. This is because the BMC is essentially a creditor, collecting payments from each of the buildings that form the BMC. This is done in the ***Creditor Maintenance*** screen and can be called the BMC's building name for example and must include all relevant details such as the BMC's bank account details, which are located in the ***Bank Account Setup screen***.