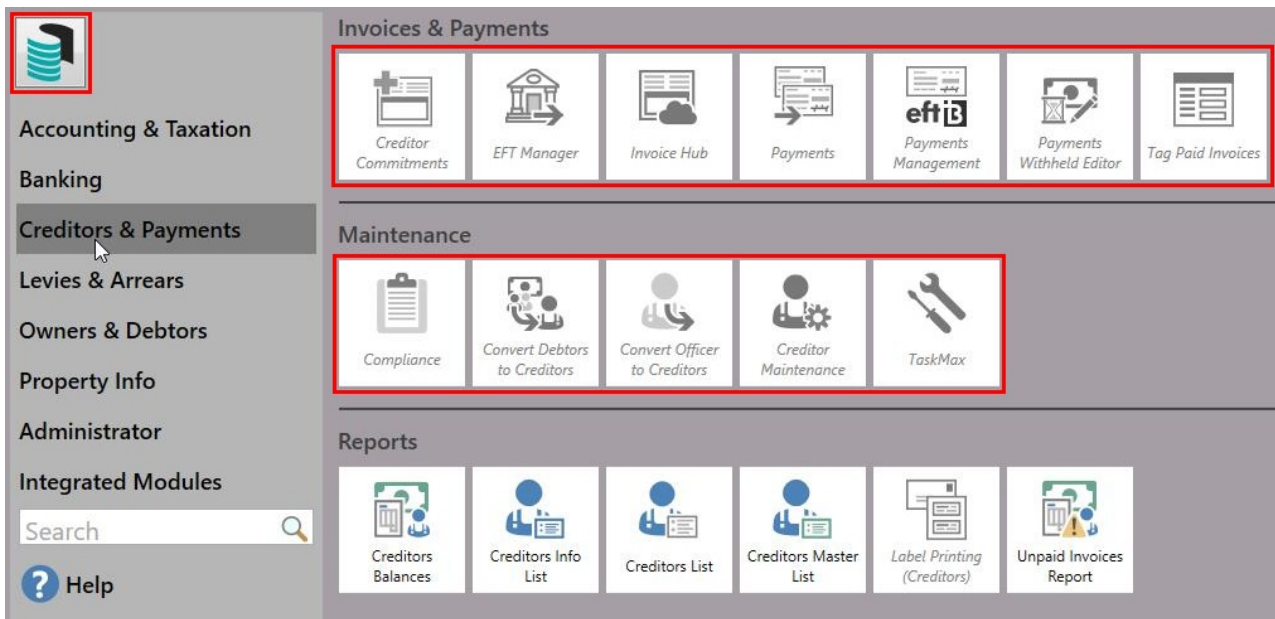


# Lost/Inactive Buildings

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This article covers changing the status of a building to *lost* and *inactive* in StrataMax. It also provides a checklist of what action items should be completed beforehand.

Once a building is set as *lost*, changes in the building are no longer possible, however the data is still accessible with reports. Any menus not available will then have a grey icon, which will be inactive. Click the *StrataMax logo* icon in the top left of the StrataMax desktop to see all available menus.



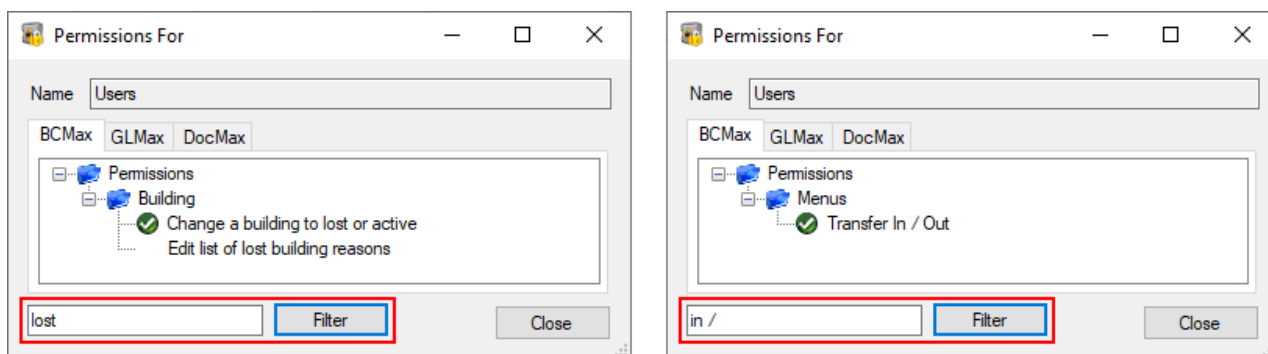
When a building is set as *lost* the following will occur:

- The building will no longer be uploaded to MaxSoft and therefore not be on the Portal or Meeting Hub.
- TRMax records will no longer be processed or recorded.
- GLMax links will be removed (the debtor will remain for reporting purposes).
- The building will not appear in the *active* list in *Building Selector Tool*.
- TaskMax reports will be unavailable.
- Most menus will not be accessible.
- Documents are retained in [DocMax](#), but the building can only be selected in [Advance Searches](#).

If necessary, a building can be set as active again to make quick changes. See the steps outlined in the [Mark as Lost via Building Information](#) section below.

## Building Status | Security Setup

In the **Security Setup** menu, there are several permissions that relate to changing the status of a building via the **Building Information** menu, and the **Transfer In/Out** menu. Use the *Filter* to locate these permissions:



- **Change a building to lost or active:** Controls the ability to change the building status between 'Active', 'Inactive', or 'Lost' in the " **Building Information** menu.
- **Edit lost of lost building reasons:** Controls the ability to add, change, or delete the reasons in the drop-down list that appears when you mark a building as 'Lost'.
- **Transfer In / Out:** Controls the ability to access the menu.

## Reports & Data for Lost Buildings

Prior to changing the building status to lost, you may be required to produce reports and particular data. The below are some common reports produced for handover.

### Report Sets

Report Sets have been designed for running specific set of reports. Plan Report, Financial Statements, Bank Reconciliation, Bank Statement Report, Aged Balance, Roll Reports, Office Bearer Reports, Insurance, Levy Register Summary and Register reports are all available to include in a Report Set.

### BAS Reports

Save the required BAS Reports for the current period.

### Ledger Cards

Tag all lots and save Ledger Cards.

### DocMax Export

Documents can be exported from DocMax with the use of an **Advanced Search**.

### Owner to Excel

Custom Queries has a Roll Extract that can be used to report roll records to Excel. Other queries are available to report to excel if required.

## Entry Reports

Entry Reports can report roll information based on the different roll categories. This is commonly used to report Owners, Tenants & Agents for all lots.

## Before Changing the Status to Lost

Prior to changing the building status to lost, a number of tasks must be completed. The below list is provided as guidance, but every strata management office should create their own specific checklist.

1. For SCM clients, log in to the StrataCash site to cancel any future **StrataCash Periodic Payments**.
2. Enter a pro-rata **Management Fee** if required (other fees may also be applicable).
3. Enter all **TRMax** records and **process recoveries & post any standing journals**.
4. Any invoices uploaded to the **Invoice Hub** must be **retracted** or **deleted** from the **Invoice Hub**.
5. Process payments in **Payments** to pay the above fees and any other outstanding invoices if required.
6. Print a report in **Other Registers**, then remove all items.
7. **Remove any of the building's owner accounts** from **Legal Action**.
8. Print any hard copy reports required.
9. Enter any notes into **Building Information**.
10. **Close the bank account** once the final payments have cleared.
11. Remove the building's investment account details from **Bank Balances**.

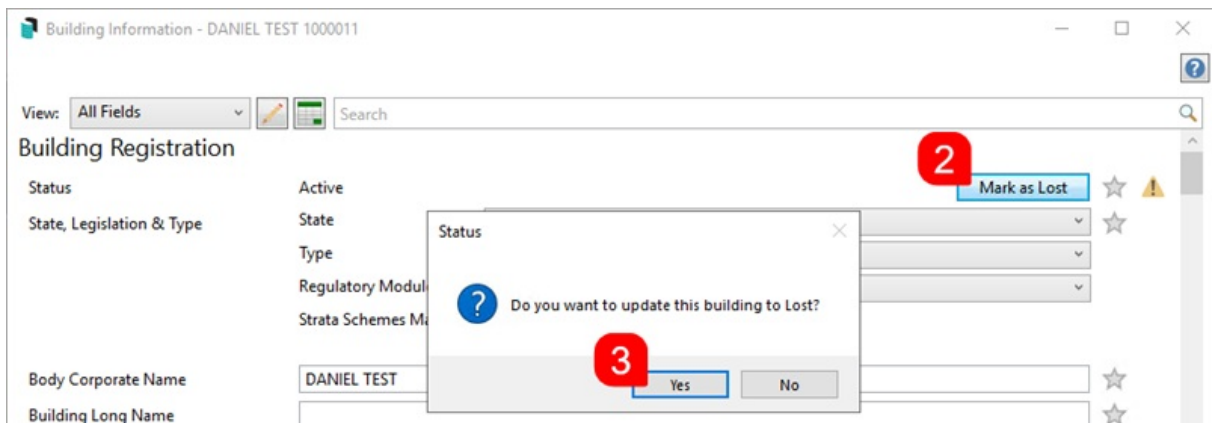
The StrataMax administration team will be automatically notified once the building has been marked as lost.

## Change Building Status to Lost | Building Information

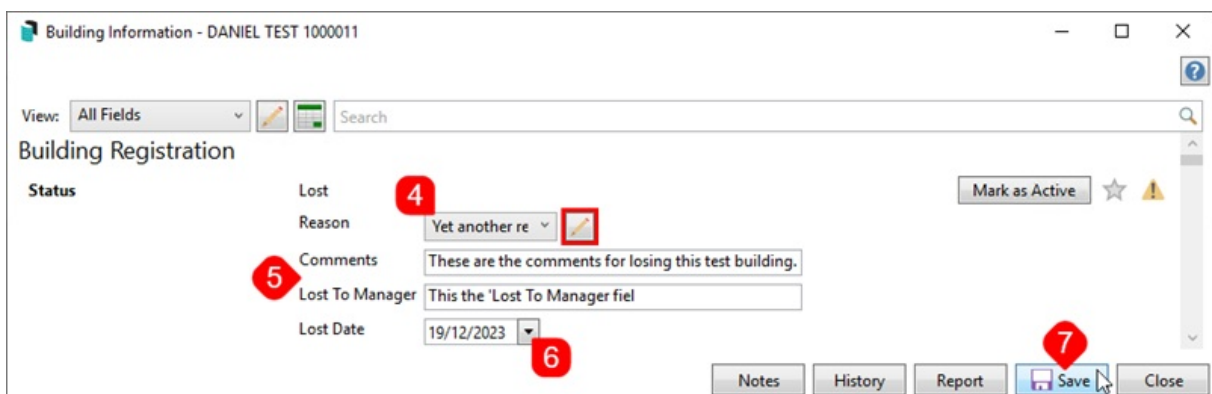
Use **Building Information** to change the building status to *Lost* without creating a Zip file with extracted data - it simply moves the building to the 'Inactive/Lost' buildings in the **Building Selector**. If you would like to retain a zip file of the building an archive file can be created prior using the **Archive All Data** menu.

In **Building Information**, the building status can be changed from *Inactive* to *Active*, and from *Active* to *Lost*, but cannot be changed from *Lost* to *Inactive* or from *Active* to *Inactive*. If you would like to change the status of a building to *Inactive*. Please contact the [StrataMax Support Team](#) if you need to change a current building status to *Inactive*.

1. Search or select **Building Information**.
2. Next to the 'Status' field, click the **Mark as Lost** button.
3. Click Yes when prompted to confirm.



4. A Reason must be selected from the drop-down menu.
  - To add another reason to this drop-down menu, click the *Pencil* (edit) button, then in the text field, type the reason and click *Add*, then click *Close*. The *Pencil* button is only available with a **Security Setup** permission called 'Edit list of lost building reasons'.
5. *Comments* and *Lost To Manager* are optional fields.
6. Select a *Lost Date*.



7. Click the *Save* button.
  - If any prompts or warnings appear, it is due to outstanding items that require action. For example, there may be active *Periodic Payments* that need to be cancelled.

After clicking the *Save* button, the *Mark as Lost* button will disappear and replaced by a *Mark as Active* and *Mark as Inactive* button - click the former to change the building to an 'Active' status again, and the latter to 'Inactive'.

## Accessing Inactive or Lost Buildings

Lost buildings can still be accessed from StrataMax however only limited information will be available and no data will be able to be changed. Once the building is marked as lost you will have access to the financial, roll and budget reports along with the building information and the registers. Owners ledger cards can be printed and also information regarding the creditors.

1. Click the *Building Selector* tool.
2. Click the *Filters* drop-down arrow.
3. Select the *Inactive/Lost* radio button.

The screenshot shows the StrataMax software interface. At the top, there is a navigation bar with tabs for 'BCMax Buildings', 'GLMax Companies', 'Recent Buildings', and 'Recent Companies'. A 'Building: STRATAMAX ONLINE HELP 11' dropdown is visible. Below the navigation bar is a 'Filters' section for 'Buildings Inactive/Lost'. The 'Inactive/Lost' radio button is selected. Below the filters is a table with columns: Number, Name, Year Start, Year End, and Account Manager. The table contains several rows of data, but they are blurred. At the bottom right of the table area, it says 'Count: 6'. There are also links for 'Select Base Building' and 'Select Master Chart Building' at the bottom left.

4. The list of buildings will instantly refresh and only display inactive/lost buildings.

## Reporting Lost Buildings

There is a dashboard item that can be set in GLMax to assist with reporting on lost and won buildings. Please see this link [here](#) on how to set configure and review this dashboard item.

## Inactive Buildings

Newly created buildings can be created with a status of *Inactive* (see [New Building \(BCMax\)](#) for more info). This has been designed to allow clients to create buildings for setup, training, and demonstration purposes. However, the building status will need to be changed to *Active* when/if levies are due to be issued.

In [Building Information](#), the building status can be changed from *Inactive* to *Active*, and from *Active* to *Lost*, but cannot be changed from *Lost* to *Inactive* or from *Active* to *Inactive*. If you would like to change the status of a building to *Inactive*. Please contact the [StrataMax Support Team](#) if you need to change a current building status to *Inactive*.

**What functions are available to set up while the building is inactive:**

- Building Information
- Roll / Office Bearers / Agents
- Insurance / Registers (most)
- Bank Account Setup
- Opening Balance Setup / Journal Preparation / Budgets
- Management Fees
- Reports (limited access to some) – Financial Statements / Transaction List

**What functions are available to use when the building is in an active state:**

- Bank Reconciliation
- Levy Management / Invoice Entry
- Creditor Invoices / Payments / EFT Manager / Invoice Hub
- Merge Letters
- DocMax / TRMax / TaskMax / Meeting Hub
- Reports / Global Reports - (those not accessible from above)