New Building Setup Process

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This article aims to provide guidance and be an overview for the process of creating and setting up a new building in StrataMax, and can also used as a check list.

It contains each required step in a numbered sequence, with each step being explained in more detail, or if more appropriate, linked to the relevant article.

When adding a new building to StrataMax, it can be set up manually or transferred in:

1. If the building is being created manually, follow the instructions in this article.
2. If the building is being transferred in from another strata management company, then the *Building Transfer article* should be followed.

When creating and setting up a new building manually, some critical information is required, in order to be entered before the building can start operating in StrataMax. It is recommended that all the necessary information is collected prior to following the instructions outlined in this checklist.

New Building Reports Checklist

New buildings can also be set up by our Full Service Team, which is a chargeable service at $180 per hour. To make a request to the Full Service Team, email them at fullservice@stratamax.com. It is important to provide as much detail as possible so that an accurate quote can be provided and to ensure the expectations of the request can be met. The *New Buildings Reports Checklist* above is a good reference point to understand what can be set up by the team.

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1. Request bank account

For SCM clients, it is highly recommended to request a bank account for any new building as soon as possible - before even starting the setup in StrataMax. The SCM bank account can be requested either *before* or *after* the building has been created in StrataMax. Please refer to the *StrataCash Hub* article.

2. Create the Building

Creating a new building in StrataMax is done in the ***New Building (BCMax)***. For guidance on this menu, you can refer to the (BCMax) *article.*

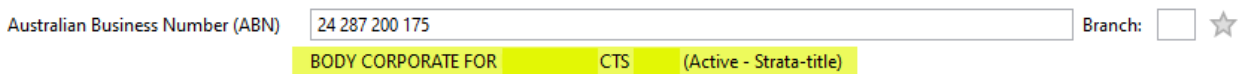
Please note that unless you create the building with a status of "inactive" it will immediately be uploaded to the StrataMax servers and be billed.

3. 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 detail on this menu, check out 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 - check the ABN matches the building name & details being setup.
- Registered for BAS/IAS (GST) - (tick for Yes or no tick for No) - enter GST status during setup, as Opening Balances will not calculate GST.
- Set BAS information - Full or Simple and Quarterly as required and ensure ATO Creditor is selected.
- Don't Prepare BAS on or before: Enter date for the BAS to calculate after.



4. Add Lots

Please review the two sub-sections here, *'Import Lots'* and *'Manual Lot Entry'* to see which option suits your requirements. Generally, we recommend using the import feature for any larger buildings (over 50 lots, for example). Please note that there is also an import function for owner information, which is covered in section *5. Add Owner Information* below. If the building has been registered with decimal places for entitlements, these can be copied and pasted if manually adding or if importing including the

decimal place in the entitlement columns.

Import Lots

From an Excel spreadsheet; click the Excel icon and select the import file, which must have the following column headers in this specific order, starting from column 'A': Code, Lot_Number, Contribution_Entitlements, Interest_Entitlements, Unit_No, Car_Space, Building_Number & Plan_Registration_Date (*Sample Import.xlsx*).

The alternative is to enter the Roll information manually, using the ***Resubdivision /Reallocate*** screen accessed from the ***Roll*** (see the *'Manual Lot Entry'* section directly below).

	A	B	C	D	E	F	G	H
1	Code	Lot_Number	Contribution_Entitlements	Interest_Entitlements	Unit_No	Car_Space	Building_Number	Plan_Registration_Date
2	02100001	1	1	1	1		6515	1/07/2018
3	02100002	2	1	1	2		6515	1/07/2018
4	02100003	3	1	1	3		6515	1/07/2018
5	02100004	4	1	1	4		6515	1/07/2018
6	02100005	5	1	1	5		6515	1/07/2018
7	02100006	6	1	1	6		6515	1/07/2018
8	02100007	7	1	1	7		6515	1/07/2018
9	02100012	12	1	1	12		6515	1/07/2018
10	02100013	13	1	1	13		6516	5/07/2018
11	02100014	14	1	1	14		6516	5/07/2018

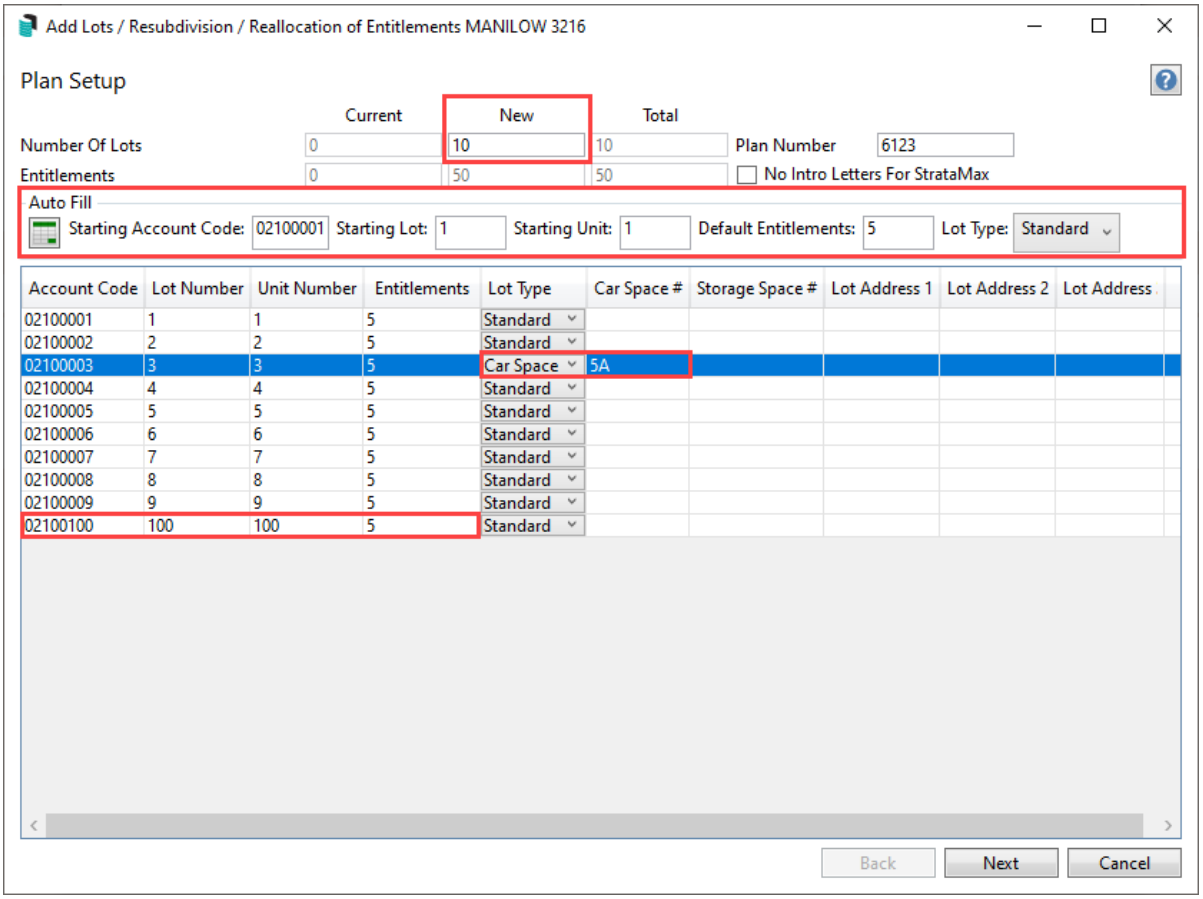
Example Import Spreadsheet

Manual Lot Entry

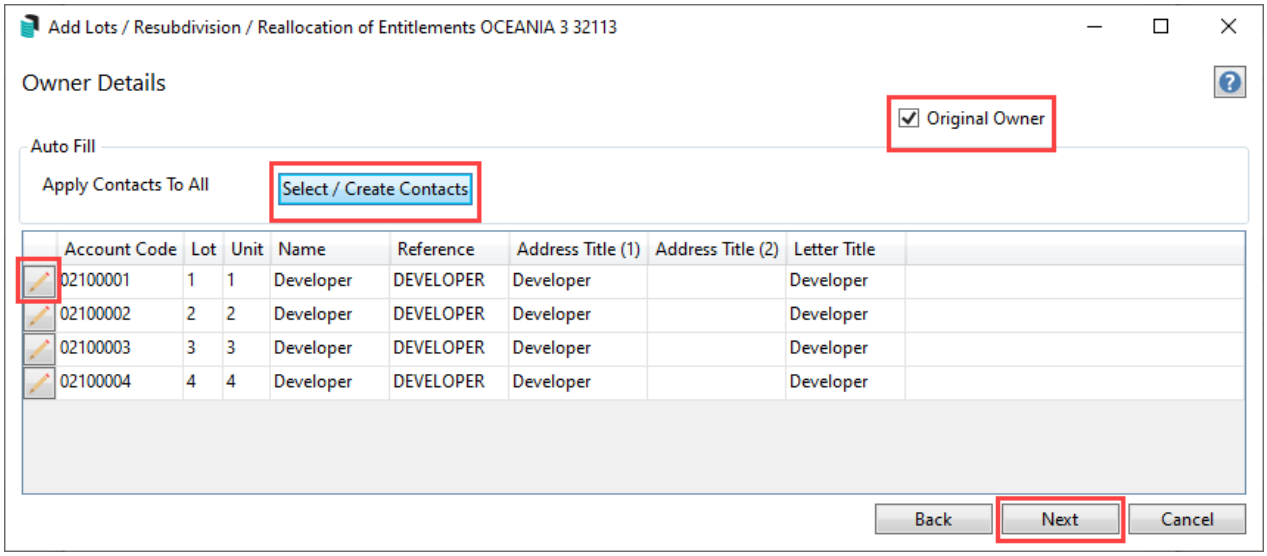
To create the lots in the ***Roll*** and select the *Original Owner/ Developer* contact card follow the below steps. Once the lots have been created, follow the Change of Ownership process to enter the current owner information. We also recommend adding any other contacts to the lots, such as letting agents, tenants, etc.

1. Search or select ***Roll***, and the *Add Lots / Resubdivision / Reallocation of Entitlements* (***Resubdivision / Reallocate***) screen will immediately appear.
2. Enter the Plan / Resubdivision Date; this will be used as the effective date for all lots (commonly the date of registration for lots).
3. Click *Next*.
4. Enter the number of lots in the *New* field. The *Plan Number* will be populated based on the information entered in step 3 above.
5. Review the table of lots using to *Auto Fill* area, check the *Starting Account Code* and *Starting Units* fields. If there is an average entitlement, enter this into *Default Entitlements* field. Check the *Lot Type* for the majority of the lot setup and adjust if needed.
6. Ensure that the *Account Code* column; 0210000X numbers align with the *Lot Number* column.
7. You can adjust any of the information in this table by double-clicking in any of cells and amending the numbers to match (common for a staged development, or a building that has a resubdivision applied).

8. If the *Lot Type* is a carpark or storage space, select these for any applicable lots and double click into the respective fields to enter the carpark or storage space information.
    - *Lot Address 1,2,3 and can be entered if different to* ***Building Information****.*
9. Click *Next* once all information has been entered.



10. Within the *Auto Fill* area, click *Select/Create Contacts* and either *Select Contact* to pick the Original Owner contact or Developer contact card, to show inactive Contacts > *Select Contact* > *Include Inactive* > *Select*, or click *Create Contact* to create the Original Owner or Developer record.
    - The 'Original Owner' contact must contain a residential address (generic is OK) to allow the contact to be valid and proceed to the next step.
11. Click *Next.*
12. Review the finalise screen for the pending lot information (click *Print* for report if required) and click *Finish* to finalise.
13. Click *OK* to message: *Finished processing Add Lots.*
14. For NSW Managers it is recommended to go to ***Building Information*** and click on the edit pencil for the Number of Lots field; edit any Lot Purposes and select Save Changes. This will ensure accurate Lot details are uploaded to the NSW Strata Hub Portal if uploading from StrataMax.



5. Add Owner Information

If the 'Developer' or 'Original Owner' information has been entered and saved, the current owner details can be entered. This is also done in the ***Roll*** with the *Change of Ownership* function. Any configured roll reports that are set to produce on a change of ownership will be sent based on the correspondence contact preference.

6. Enter the Bank Account Details

Once the bank account confirmation has been received from the StrataCash team, the bank account details should be entered into StrataMax. Please refer to the *Enter a New Bank Account* article for more info.

7. Setting up GST (if registered)

The *GST Registered* field in ***Building Information*** must be ticked to 'Y' if the building is GST registered. After this has been set and saved, the *Don't Prepare BAS on or before date* will need to be entered into ***Building Information*** under the *Registered for BAS/IAS (GST)* section. Ensure the review the GST Style and set Net Style or Gross Style and add in the ATO Creditor Account.

8. Enter Opening Balances

Entering the opening balances or handover financials is done in ***Opening Balance Setup***. For guidance on this screen, you can refer to the ***Opening Balance Setup*** article.

9. Import Building into GLMax

Once the building is created in StrataMax/BCMax, it will need to be imported into ***GLMax*** as a debtor in order to *process recoveries* and *management fees*. The ***Import Buildings as Debtors*** article details this process.

10. Management Fees Setup

For more information on this process, you can refer the ***Management Fees Setup*** article.

12. Entering Levy Information

The next step is to create and approve the levies and set any previously issued as 'Prior Manager'. You can refer to the ***Levy Management*** article for guidance on both of these.

Prior Manager

If the new building has levies that were already issued by the previous strata management company before handover/transfer, then these still need to be entered in StrataMax for reporting and certificate purposes. However, because any outstanding balances from previous levies should have already been entered against any applicable lots in the ***Opening Balance Setup*** screen, it's important to not generate these levies as this will charge the owners again.

Instead, the period should be set as *Prior Manager* to tell the system that these levies have already been generated and issued, and the income was already accounted for. It also does two other things:

1. It allows a specific levy period to be skipped during the levy generation process.
2. It sets the 'paid to' dates for the lot accounts, which the system will use to calculate arrears.

Only use this function for levies that were already issued by the previous management company, and past their due date.

Generate Levies

Prior to generating levies, it is very important to enter the lot balances in the ***Opening Balance Setup*** screen to account for any advance levy payments or for any outstanding levy arrears. In addition, the generation of levies should only be done for levy periods that have a due date after the date of the handover financial statements, and only if the previous management company did not issue them.

For more information about generating levies, please refer to the ***Levy Management*** article.

13. Enter Office Bearers

To learn about ***Office Bearers***, take a look at the ***Office Bearers*** *article*.

14. Entering Budget Information

Clients on *StrataMax version 5.6.127* and above can enter the budget information in the ***Opening Balance Setup*** screen. Clients using previous version can use the ***Budget Update*** screen. See the *Enter a Budget* section of the ***Budget Update*** article contains all the necessary information to complete this step.

15. Set Bank Overdraft Limit

This function is to set a limit in the system for the bank overdraft for this building. The overdraft limit is used to check when a payment is being posted if the amount causes the overdraft to be exceeded. This can be overridden in ***Payment Entry***. To set the overdraft limit simply open ***Set Bank Overdraft Limit***.

16. Insurance

There are various areas of StrataMax that are connected to ***Insurance***, and are validated. Therefore it is recommended to enter the building's insurance details at the earliest convenience. The documents that contain this information can be either the latest invoice from the insurance broker, or the certificate of currency.

For details on how to enter this information, as well as everything else pertaining to this menu, please head over to the ***Insurance*** article.

17. Multi OCs (VIC)

In Victoria, buildings may contain multiple owners corporations. The purpose of these is to facilitate the fair calculation of expenses and levies for areas or facilities that are only used by a certain number of lots within a building. StrataMax allows the setup of multi OCs from within ***Account Group Setup***.

To learn how to set up Multi OCs in this menu, check out our ***Account Group Setup*** article.