

Full Service

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This article highlights the range of tasks and services offered by the StrataMax Full Service Team to support StrataMax clients. Each section provides a detailed overview of the tasks available, the required information to complete them, and a convenient email template to ensure all necessary details are included. This streamlined process helps prevent delays and enables the team to begin promptly.

The StrataMax Full Service Team operates under a Service Level Agreement (SLA) of four business days. This timeframe begins once all required documentation and client specifications have been provided. The team is committed to delivering solutions efficiently, often completing requests well ahead of the SLA.

The current hourly rate for Full Service is \$180 incl. GST, charged in 15 minute increments and a ticket can be raised with the Full Service Team, by sending an email to their email address at fullservice@stratamax.com


Full Service Request Types

The Full Service team are able to perform a variety of tasks including, but not limited to:

- Resubdivisions.
- Opening Balance entries of new buildings.
- Reconciliation of GST for BAS purposes.
- New building setups.
- Post-transfer tasks for building transfers.
- General data entry.

Full Service | New Building Setup

The Full Service team are able to enter new buildings that need to be set up manually (i.e. not transferred from another StrataMax portfolio). The length of time required to complete this request will vary depending on the size and type of the building, as well as how much information you would like the team to enter on your behalf.

In any instance, please review the required documentation outlined in the [New Building Reports Checklist](#)  and provide the relevant document required for the information you would like the team to enter. For example, if you would like the team to just create the building, enter the owner information, and the opening balances, then you will need to provide those documents.

Full Service | New Building Setup E-mail

Hello Full Service,

We would like a new building created and set up in our portfolio with the following information entered:

- Building information (CMS).
- Owner information (Roll Report).
- Opening Balances (Financial Statement).
- Levy periods (AGM Minutes).
- Insurance (Certificate of Currency).

Please see attached reports and documents for the above.

Full Service | Post Building Transfers

The Full Service team are able to complete tasks that are required after a building has been transferred to your portfolio from another StrataMax client. It's important to understand, however, that not all post building transfer tasks can be completed by the Full Service team, as some of the tasks are specific to your management office, your office processes, and how you manage your buildings - so these should be completed by yourselves.

The length of time required to complete this request will vary depending on the size and type of the building, as well as which tasks you would like the team to complete on your behalf.

Full Service | Post-Transfer Tasks

These are areas that will affect global processes and reporting. Review the tasks below thoroughly to determine which ones you would like the Full Service team to complete.

Critical Tasks
Complete a <i>Data Storage</i>
Update critical details in <i>Building Information</i>
Set up new bank account in <i>Bank Account Setup</i>
Review owner Direct Debits.
Use <i>Change Code Number</i> to change any codes to align with the codes in the Master Chart.

Use **Change Code Number** if your creditor account code is the same as the previous strata manager's code

Use **Creditor Maintenance** to add your creditor account to the building

Import the new building into GLMax using **Import Buildings as Debtors**

Add your management fees in **Management Fees Setup**

Recommended Tasks

Update additional details in **Building Information**

Use **Contact Management** to split combined owners or merge duplicate contacts

Check **Office Bearers** has the correct contact for the Body Corp Manager position

Update insurance policies in **Insurance** to match the Master Chart

Check, and amend, if necessary, templates in various areas (levy notices, ledgers cards, etc.)

Check **Arrears Notice Setup** to ensure the schedule, its templates, and cover letters are correct

Check **Arrears Fees Setup** to ensure it's using the *Global* settings

Check **Levy invoice Code Setup** and amend or delete as necessary

Note the Second Debtors totalling account

Check codes in **Budget Summary Setup** and delete or insert codes as required

Ensure account codes in GST Setup and BAS Info Edit match the Master Chart

Merge and delete 'Categories' in **DocMax**

In **DocMax**, review the 'Document Group' and 'Remove from Portal After' fields before uploading

Review and manage any *Sub-Groups*

Ensure any codes in any used registers (**Inspections, Contracts, Asset**, etc.) match the rest of your portfolio

Full Service | Post Building Transfer E-mail (Example)

Hello Full Service,

We would like to request the completion of the following post building transfer tasks with the following information entered:

- Bank account details.
- Building information (CMS).
- Add account codes from our Master Chart.
- Insurance codes (Insurance CoC).
- Contact cleanup.

Please see attached reports and documents, applicable for the above.