Full Service

Last Modified on 04/06/2026 3:14 pm AEST

This article highlights the range of tasks and services offered by the StrataMax Full Service Team to assist StrataMax clients. Each section provides a detailed overview of the tasks available, the required information to complete, 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.

Although at times the service offered by the Full Service Team involves a level of troubleshooting and investigation to address issues and challenges that arise whilst completing a task, it is not intended as a substitute for technical support or training. This is due to each team having their own distinct set of skills, knowledge, and experience, and internal processes, which are designed to provide our clients with the most efficient, best service possible. This is why in some instances, the Full Service team will engage or refer clients to the Support or Training team - so they can be leveraged to offer the quickest and most cost-effective outcome.

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 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.

Please review the required documentation outlined in the *New Building Reports Checklist* and provide the relevant documents for what tasks are to be completed.

For example, if you would like just the building created and the current owner information, plus opening balances, then you will need to provide those documents.

Buildings with a high lot count may take a substantial time to complete. Providing reports in Excel format (not PDF converted documents) may assist with reducing the time these tasks take.

These larger pieces of work may fall outside the standard SLA of four days.

Full Service | New Building Setup email (example)

Hello Full Service,

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

- Building information (CMS / Strata Plan / Titles Plan / Plan of Subdivision).
- 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 ***Data Storage***
Update critical details in ***Building Information***
Set up new bank account in ***Bank Account Setup***
Review owner Direct Debits.
Use ***Change Code Number*** 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 email (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.