

# Master Chart

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The instructions in this article relate to the Master Chart located by selecting **Select Master Chart Building** from the Building Selector Tool in StrataMax.

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StrataMax is available with a default Chart of Accounts; this Master Chart can be amended as required and changes can be applied to all properties including the Base Building (template building). The account codes for the Balance Sheet, Income and Expenditure (Admin & Sinking / Maintenance) have set ranges; this is detailed further in [Account Code Explanation](#).

The Master Chart will always report in numerical order; this should be kept in mind when you are designing the layout for financial statements. It is recommended to construct and review the Master Chart soon after installation so that the setup is correct from the beginning. Using a five digit account code range will allow expansion when additional accounts are required.

Up to eight numbers (digits) can be used to create an account code; this allows the ability to increase the Master Chart of accounts while still ensuring that it will be in alphabetical order. The set prefixes will determine the type of account, assets, liabilities, income & expenditure.

Not only is the Master Chart of Accounts set within the Master Chart Building, but other menu options are also available for review. These menus include:

- [Account Maintenance](#)
- [Creditor Maintenance](#)
- [Insurance](#)
- [Contracts](#) and [Inspection Registers](#)

The purpose of these being available for updates in the Master Chart is to give clients control of how these menu options are treated within Master and Building/Local level.

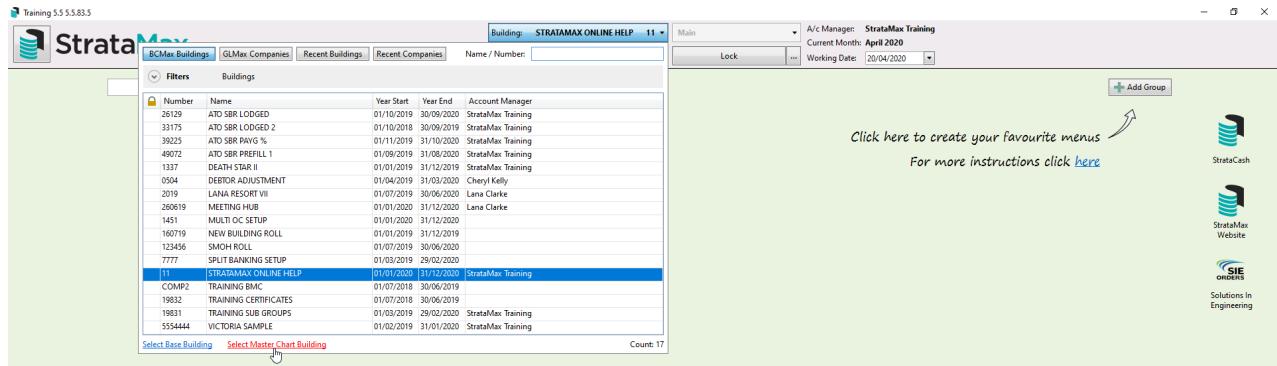
Maintaining the Master Chart Building is a task that often requires review on how this is managed and reporting is available here to assist in ensuring consistency. Some of the tools and reporting options include:

- Master List, Master List Tax Code
- Creditor List, Creditor Info List
- [Account Maintenance](#)
- [Reports/ Utilities \(Global\)](#)
- Integrity Tests

Before using any Integrity Tests contact the StrataMax Training team for further information about maintaining Chart of Accounts.

## Access to Master Chart Building

From the Building Selector Tool, click **Select Master Chart Building**.



## Delete Contracts Master List Account Codes

You cannot add or make amendments from the Master List due to mandatory fields.

1. From the Building Selector Tool, click **Select Master Chart Building**.
2. Search or select *Contracts*.
3. Select the record and click *Delete*.
4. Click Yes to Delete and Yes to Are you Sure?

## Delete Inspection Register Master List Account Codes

You cannot add or make amendments from the Master List due to mandatory fields.

1. From the Building Selector Tool, click **Select Master Chart Building**.
2. Search or select *Inspections*.
3. Select the record and click *Delete*.
4. Click Yes to Delete and Yes to Are you Sure?

## Delete Insurance Master List Account Codes

You cannot add or make amendments from the Master List due to mandatory fields.

1. From the Building Selector Tool, click **Select Master Chart Building**.

2. Search or select *Insurance*.
3. Select the record and click *Delete*.
4. Click Yes to Delete and Yes to Are you Sure?

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