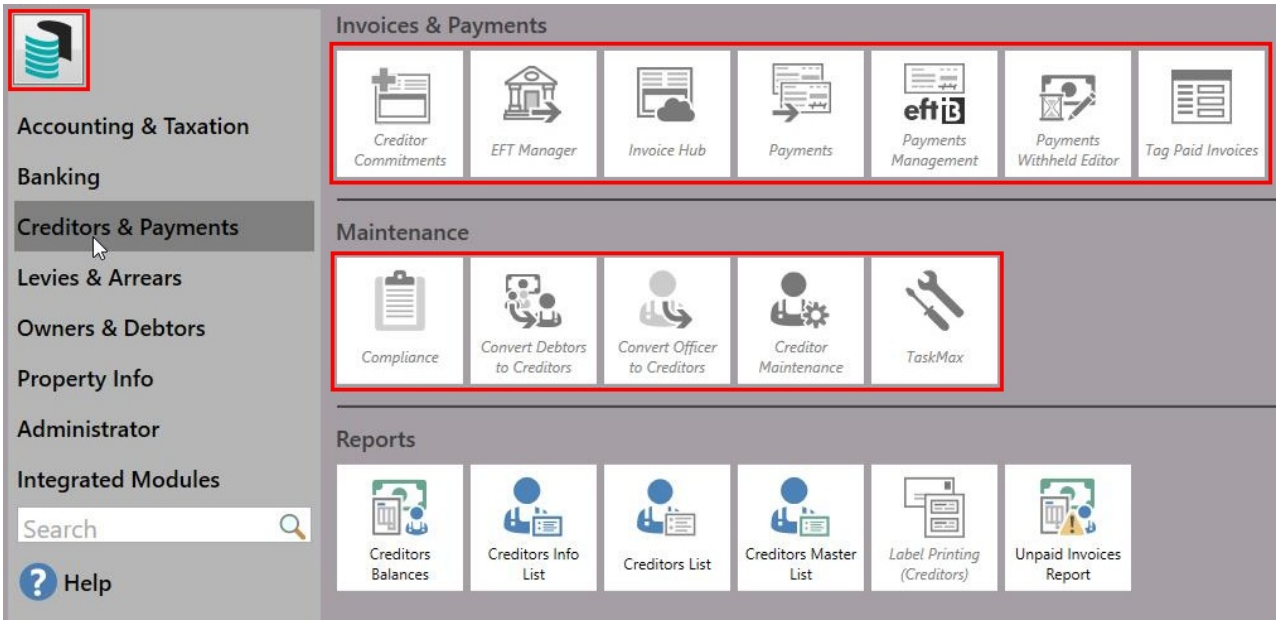
Lost/Inactive Buildings

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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.

Lost Buildings

Once a building is set as *Lost*, changes in the building are no longer possible, however the data is still accessible with a variety of reports (see 'Reports & Data for Lost Buildings' below). 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 will not be billed.
- It will not be on the Portal, Invoice Hub, 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 the *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 *Advanced Searches*.

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.

Buildings with a status of *Inactive* will not be uploaded to the StrataMax servers and not be billable. Inactive buildings cannot issue levies, pay creditors, access Invoice Hub, use the StrataMax Portal, or Meeting Hub & VoteMax.

Functions available while the building has a status of *Inactive*:

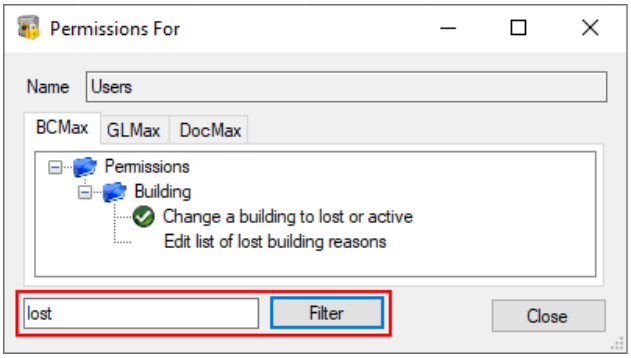
- Building Information
- Roll / Office Bearers / Agents
- Insurance / Registers (most)
- Bank Account Setup
- Opening Balance Setup / Journal Preparation / Budgets
- Management Fees
- Reports (limited access to some) – Financial Statements / Transaction List

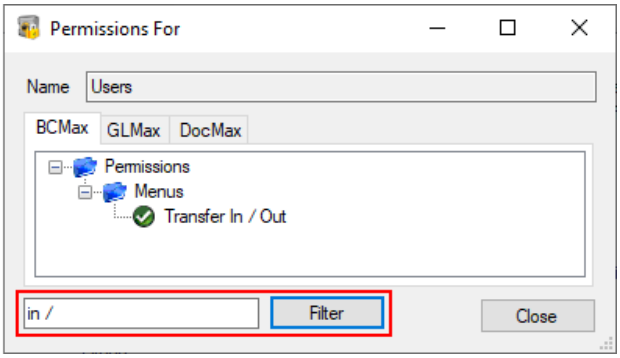
Functions available while the building has a status of *Active*:

- 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)

Building Status | Security Setup

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





- **Change a building to lost or active**: This option controls the ability to change the building's status between 'Active', 'Inactive', or 'Lost' in ***Building Information***.
- **Edit list of lost building reasons**: This control allows you 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

Before changing the building status to lost, you may be required to produce reports and specific data. Below are some standard reports produced for handover, which can be done as one report in Report Set. A Report Set can also be produced for Lost/ Inactive Buildings from Report Set by adjusting the Building Filter to include the Lost/ Inactive list and tagging the building.

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. This may require a BAS to be prepared if the current period is incomplete, then the BAS Reconciliation Report saved.

Income Tax

View the current year ***Income Tax*** to be prepared and reported, although it is not completed. This can be viewed in Prepare Income Tax and reported, but not Finalised.

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 Reports

The ***Search Roll*** screen has the ability to export Roll data that can be used to report roll records to Excel.

Entry Reports

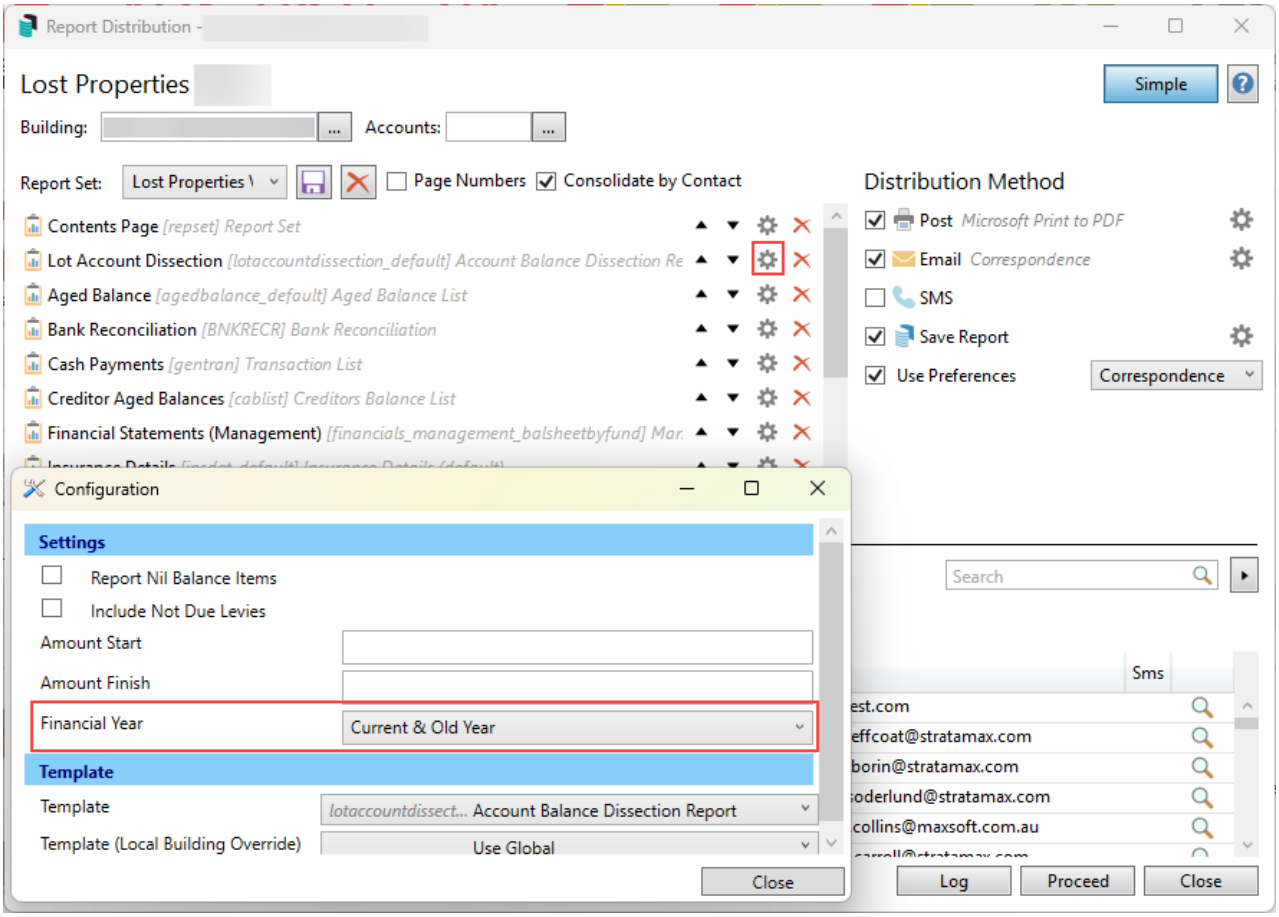
Entry Reports can report roll information based on the different roll categories. This is commonly used to report Owners, Tenants & Agents for all lots.

Transaction List

Can be used in current and old year to report transactions for any account code/s in the building.

Financial Statements

These can still be produced with a variety of options and settings.



Before Changing the Status to Lost

A number of tasks must be completed before changing the building's status to lost. The list below is provided as guidance, but every strata management office should create its own specific checklist.

1. For SCM clients, log in to the StrataCash site to cancel any future ***StrataCash Periodic Payments***.
2. Enter a Termination Date in ***Management Fees Setup*** so no further charges can be processed.
3. Enter a pro-rata *Management Fee* in ***TRMax***, if applicable (other fees may also be applicable).
4. Enter all ***TRMax*** records and *process recoveries* for the specific Building, in GLMax.
5. Any invoices uploaded to the ***Invoice Hub*** must be *retracted* or *deleted* from the ***Invoice Hub***.
6. Process any remaining ***Payments*** to outstanding contractors, including the Strata Manager.
7. *Close the bank account* once the final payments have cleared. Also update all investment accounts as closed.
8. Process the closing bank balance to reconcile the ***Bank Reconciliation*** balance to $0.00 (often 'Cash on Hand' is used).

9. Produce report sets from either ***Report Set*** or using the Report Distribution screen and save any other reports individually to ***DocMax*** ready for handover with the documents.
10. Export any documents and reports using a saved search on ***DocMax***.

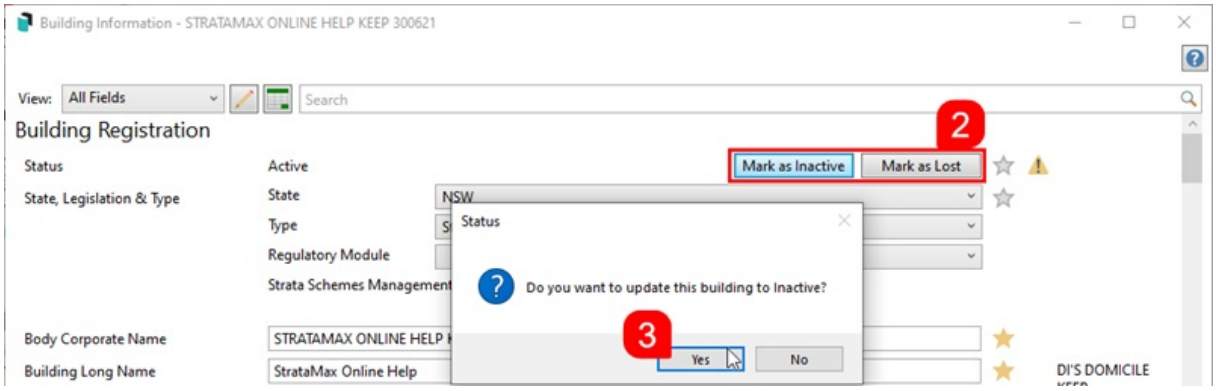
> The StrataMax administration team will be automatically notified once the building status has been changed to lost and will not be included in future billing cycles for your StrataMax portfolio.

Change Building Status to Lost or Inactive | 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*.

> GLMax companies cannot be changed to lost or inactive; instead use the ***Delete Company*** process.

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

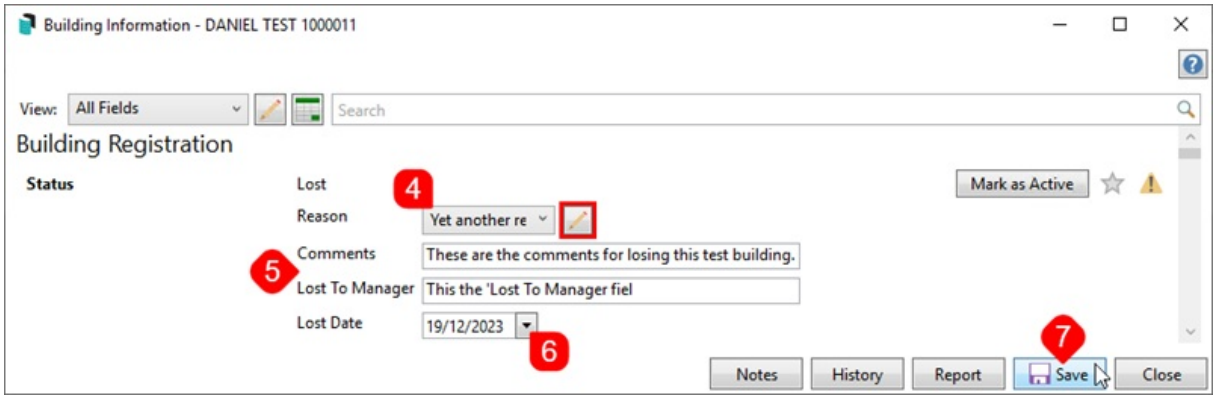


4. If you selected *Mark as Inactive,* simply click the *Save* button to save the change and *Close* to close the ***Building Information*** screen.

   If you selected *Mark as Lost,* then a *Reason* must be selected from the drop-down menu before you can save the changes.

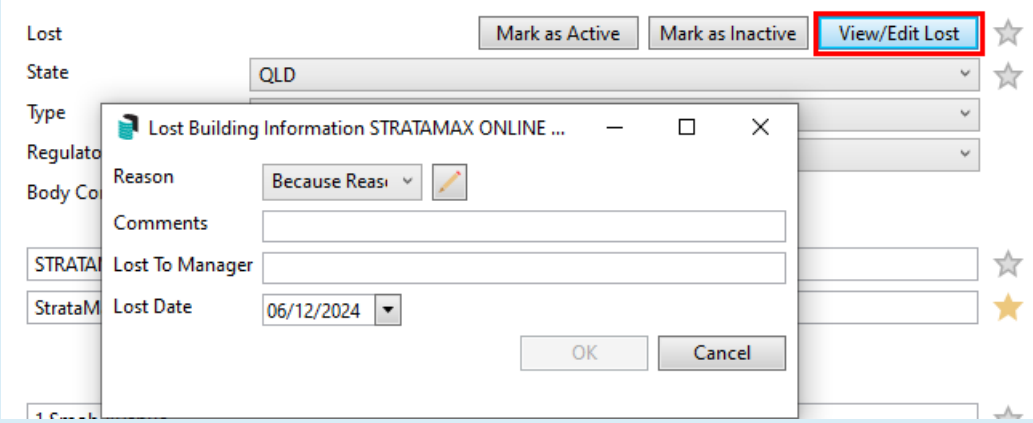
   - To add another reason to this drop-down menu, click the *Pencil* (edit) button, then in the text field, type the reason and click *Add,* then click *Close.* The *Pencil* button is only available with a ***Security Setup*** permission called 'Edit list of lost building reasons'.

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.

All of the above 'Lost' information can be viewed and edited by clicking the*View/Edit Lost* button in the top right.

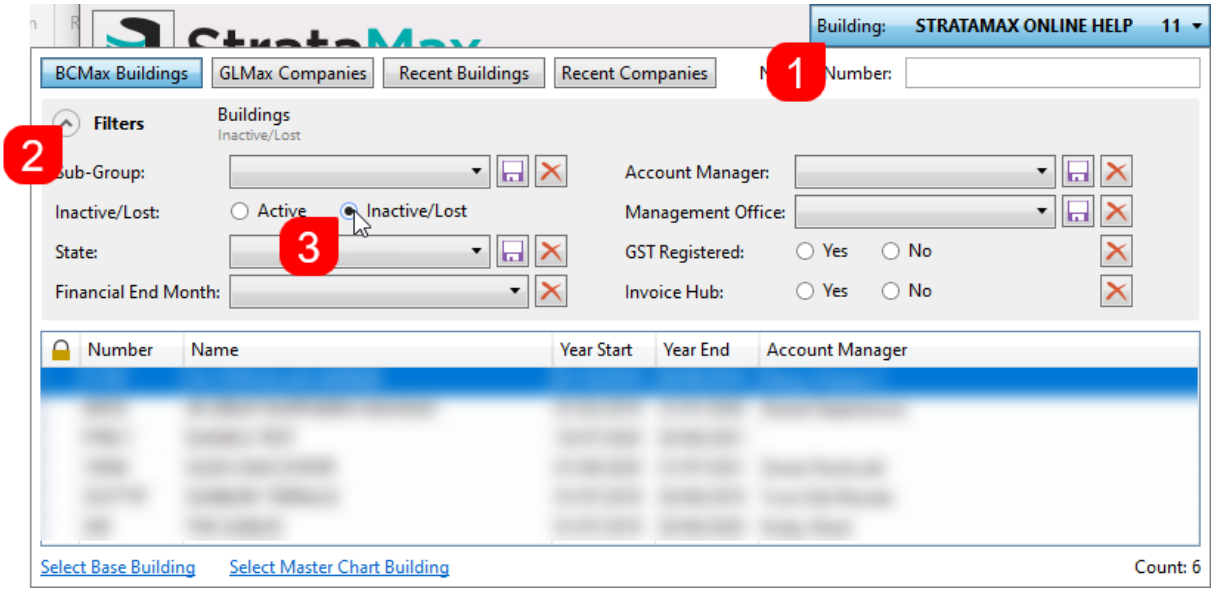


Accessing Inactive or Lost Buildings

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. A Report Set can also be produced for Lost/ Inactive Buildings from ***Report Set*** by adjusting the Building Filter to include the Lost/ Inactive list and tagging the building. 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.



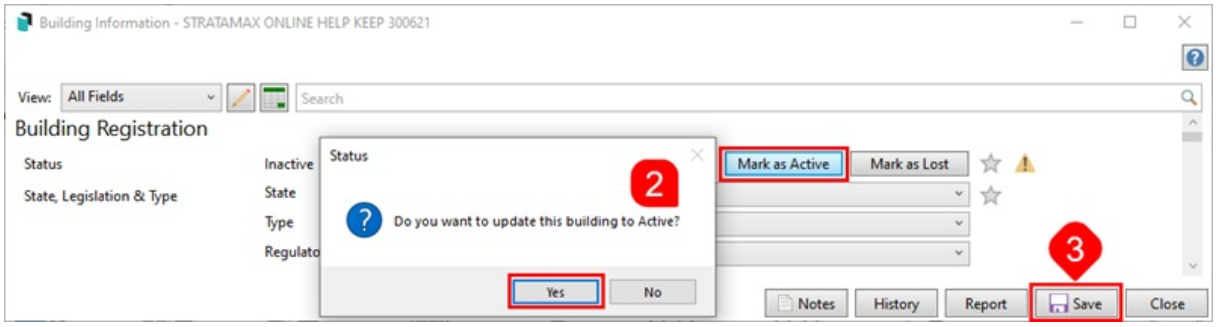
4. The list of buildings will instantly refresh and only display inactive / lost buildings.

Change Building Status to Active | Building Information

Once the buildings status is changed to *Active* it will immediately be uploaded to the StrataMax servers and be billable. This is required in order to issue levies, pay creditors, enable Invoice Hub, use the StrataMax Portal, or Meeting Hub & VoteMax.

> Changing buildings from a *Lost* status to an *Active* status is only available to the StrataMax Support Team. In these instances, please *log a support case with the Support Team*.

1. Search or select ***Building Information***.
2. Next to the 'Status' field, click the *Mark as Active* button, and click *Yes* when prompted to confirm.
3. Click the *Save* button, then *Close* to close the ***Building Information*** screen.



4. The StrataMax desktop icons will then refresh to become active again.

Reporting Lost Buildings

A dashboard item can be set in GLMax to assist with reporting on lost and won buildings. Please see this link for instructions on how to set up, configure, and review this dashboard item.