New Building (BCMax)

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The instructions in this article relate to **New Building (BCMax)**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

This screen is always used when <u>manually</u> creating a new building in StrataMax. Please ensure you have the official property details available to ensure this information is loaded correctly. Please refer to the *New Building Setup Process article* for the entire process.

Add New Building

Populate all fields on the left (mandatory ones are highlighted in red) and then click the Save button.

Add New Building - NEW BUILDING NAME 123456			
			•
Building Name	NEW BUILDING NAME	State / Country	Australia - QLD 🗸 🗸
Building Number	123456	Building Type	Building Format Plan (E \vee
Financial Year Start	01/07/2025 🔹	Regulatory Module	Accommodation v
Financial Year End	30/06/2026 🔹	Credit Card Fees	Surcharged to Payer 🛛 🖌
Date of Registration of Plan	01/07/2025 🔹	BPAY Biller Code	STRATAPAY 🗸 🗖
Plan Number	123456	GST Style	Net 🗸
Current Month	July ~	Default ATO Creditor	08200003 AUSTRALIAN TAXA
Manager Company	STRATA MANAGER (GCOMP2) V	Account Manager	Lana Clarke 🗸 🗖
Levy Year / AGM	3 ~	Status	● Active ◯ Inactive
			Save 5 Cancel

- 1. Building Name: The name of the property.
- 2. Building Number: The CTS or Plan number.
- 3. Financial Year Start: The financial year start date of the building. This can be typed in or selected from the calendar drop-down. This <u>cannot</u> be a date in the future. So, for example, if today's date was the 30th May 2020, and the building's financial years doesn't start until 1st July 2020, the *Financial Year Start* would need to be 1st July 2019.
- 4. Financial Year End: This will populate automatically after selecting the Financial Year Start date.

This can be typed in manually as well.

- 5. Date of Registration of Plan: This must be the *Financial Year Start Date* or earlier.
- 6. **Plan Number:** The field is mandatory in QLD buildings and if left blank in a non-QLD building, the building number will be automatically populated. The field is not relevant for GLMax companies.
- 7. **Current Month:** This should automatically populate to the system's month, but can be changed if necessary if loading Financial data from a prior month.
- 8. Manager Company: This field will be defaulted to COMP1. If there are multiple companies available, they can be selected from the drop-down list when setting up the building. Once saved the company manager will be added to *Office Bearers* menu in the building.
- 9. Levy Year / AGM: Enter the months the Levy Year start date will be offset with the Financial Year to indicate when levies are approved at the AGM. When the new building is saved, Levy Management will show the Levy Year as offset by this number of months to the Financial Year and helps to determine if levies should be interim. If unsure, enter 0 to match the Financial Year date and the Levy Year can be edited in Levy Management if required later.
- 10. Account Manager: Select an Account Manager on set up. This can be adjusted in *Building Information* if required.
- 11. Status: Active / Inactive: These radio buttons are designed to assist with the automatic uploads of new buildings, which have a status of *Active*. The *Inactive* option has been designed to allow clients to create buildings for setup, training, and demonstration purposes. However, the building status will need to be changed to *Active* when/if levies are due to be issued.

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.

Use the *Building Information* screen to change the building status from *Inactive* to *Active*, but be aware that once it has been changed to *Active* it cannot be changed back to *Inactive* again - in these instances you will need to contact the <u>StrataMax Support Team</u>.

Default Fields

Fields on the right are able to be applied as a default global setting. After applying the required setting from the drop-down menu, click the *Save* button (📓 icon).

- State/Country field once selected is the driver for what is displayed for the Building Type field drop down list. For example, if QLD is selected, the list will show QLD building types.
- 2. Building Type: Select the required Building Type, the list will be supplied according to the State

selected.

- 3. *Regulatory Module* list is filtered further once a building type is shown. For example, if B.F.P is selected the relevant Regulatory Modules are shown.
- 4. *Credit Card Fees:* Surcharged to Building or Surcharged to Payer. StrataPay use this field to determine whether the credit card service fee is surcharged to the owner or drawn from the building.
- 5. *BPay Biller Code*: Select STRATAPAY to produce a StrataPay Deposit Slip.
- GST Style: Select Net or Gross if the property is GST Registered. This can be edit in Building Information.
- 7. *Default ATO Creditor:* Select the ATO Creditor Account. This can be edited in*Building Information*.