Merge Levy Notice Setup

Last Modified on 24/07/2025 11:31 am AEST

Merge Levy Notice Setup is for selecting lot owners within a selected building to be grouped together on the one levy notice. This is useful for any lots still belonging to the original developer, and for grouping lots which are all owned by one person, company or other entity. If a lot is sold, when the Change of Ownership is completed the lot will automatically be removed from the Merge Levy Notice Setup menu.

A combined levy notice with one deposit slip will be produced for the lots grouped in Merge Levy Notice Setup, with one StrataPay reference number to be provided to the owner. The ***Bank Reconciliation*** will automatically allocate the payment across the merged lots. A single merge levy notice will be stored in DocMax against the last lot based on account codes.

The content in this article is applicable to *StrataMax version 5.6.134* and below. For *StrataMax version 5.6.135* and above, please refer to the more recent Merge Levy Notice Setup article.

Merge Levy Notice has no impact on Arrears Notices and Ledger Cards; these will continue to be per lot reports.

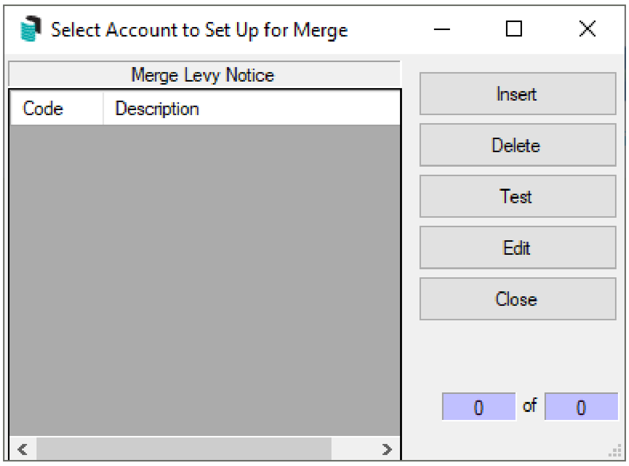
If lots that form part of a Merge Levy Notice want to setup StrataPay Direct Debits they will need to set one up for each lot using the lots individual StrataPay numbers.

Add a Group to Merge Levy Setup

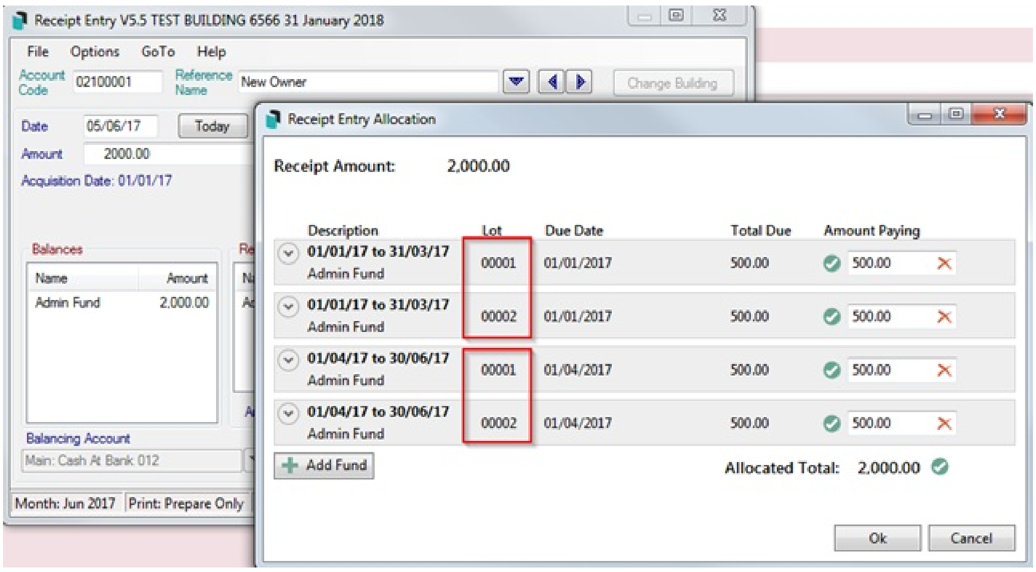
1. Search or select ***Merge Levy Notice Setup***.
2. Click *Insert* and tag the lot accounts to include in one group. All accounts tagged here will be merged into one levy notice.
3. If you wish to set up a few groups, create each group separately. Then click *OK*.

- **Delete -** Will delete the entire group of lots you have just selected.
- **Test -** Select '*Test*' and the system will ensure that all contact details for tagged lots are identical.

- **Edit** - Click '*Edit*' to add or remove lots tagged in previous step.



> ***Note*** - you will only be able to group lots with owner details that are identical - this safeguards against accidentally selecting an incorrect lot.



Edit existing Group of Merge Levy Notice Setup

1. Search or select ***Merge Levy Notice Setup***.
2. Select the group to edit, then click *Edit.*
3. Tag the lot accounts to include in one group, or untag lots to remove from this group. All accounts tagged on this list will be merged into one levy notice.
4. Shortcut: Click on the **Name** heading in the Account Code List to sort in alphabetical order. You can then scroll through the list of lot accounts, and any with the same name will be grouped together to make it easier to untag or tag as required.
5. Click *OK*.

Note: If a Change of Ownership is completed in the Roll for one of the lots grouped in Merge Levy Notice Setup, the lot will be automatically removed.

Delete existing Group of Merge Levy Notice Setup

1. Search or select ***Merge Levy Notice Setup.***
2. Select the group to delete then click *Delete.*

Delete single lots from Merge Levy Notice Setup

1. Search or select ***Merge Levy Notice Setup.***
2. Select the group you wish to remove a lot from, then click *Edit.*
3. Un-tag the lot/s you wish to remove from this group. All accounts tagged on this list will be merged into one levy notice.
4. Click *OK*.