Levy Notice/Reports | Tools Menu

The instructions in this article relate to the options from the Tools Menu of Levy Notice/Reports which can be located by searching or selecting **Levy Notice/Reports** from StrataMax.

There are fields on levy and arrears templates that are customisable, such as due date wording, the description of advance payments or arrears payments. Some of these options will edit certain fields on a template, while others change the description of the word displayed on notices.

Editing wording will change wording for all buildings.

Edit GST Wording for Levy

1. Select *Tools* then *Edit GST Wording*.
2. Select *OK* to the *GST Wording* prompt.
3. Edit the wording and close.

The first line of text is used where there is no discount.

The second line is used where there is a discount.

Example of how it will look on a levy notice; this is the default wording which is used if the Notepad is left blank.

Building without discounts:

GST component on levies of $690.91 is $69.09

Building with discounts:

GST component on gross of $1,221.64 is $122.16 or on net of $1,099.47 is $109.95

GST Wording for Levy Notices

The words used on Levy Notices and Invoices may be edited by you using Edit GST Wording. This uses Field 67 in Levy Notices and Arrears Templates. There are now several options for replacement of the displayed data. The words in brackets are replaced with data as follows:

<GrossAmount> The Gross Levy (before discount) excluding GST

<GrossAmountIncTax> The Gross Levy (before discount) including GST

<GSTOnGross> GST on the Gross amount

<NetAmount> The Net Levy (after discount) excluding GST

<NetAmountIncTax> The Net Levy (after discount) including GST

<GSTOnNet> GST on the Net amount

Example:

GST component	on gross of $	<GrossAmountIncTax>	is $	<GSTOnGross>
GST component	on gross of $	<GrossAmountIncTax>	is $	<GSTOnGross>
or	on net of $	<NetAmountIncTax>	is $	<GSTOnNet>

Edit Interest Wording

Before you add the interest wording, ensure that the building is setup with the overdue interest rate in *Building Information* and *Overdue Levy Interest Rate* has the correct interest. Also, before printing a levy notice ensure that you have *Print Interest Words* ticked on the conditions tab in *Levy Notice/Reports*.

1. Overdue Interest wording uses Field 61 in *Levy Notice* and *Arrears Notice* templates.
2. Click on *Default Interest Wording*. An additional option is available for state specific wording if required.
3. Click *OK* to the message - these fields are found in *Building Information* and will need to be completed if you want to add them in step 5.
4. Notepad will open and you can amend the default wording; ensure that you have the correct words in between the hashes.
5. Click *File* and *Save* or click *X* and then *Save*.

#Rate# is replaced with the Levy Overdue Interest Rate.

#Days# is replaced with the Interest Days.

#ByLaw# is replaced with Overdue Interest By-Law.

Example of how it will look on a levy notice; this is the default wording which is used if the Notepad is left blank (may differ based on Levy Template):

 Interest at the rate of 10.00% per annum is payable on overdue Levies.

Edit Arrears Wording

Edit Arrears Wording changes the wording that displays on a notice when there is an amount in arrears. If left blank default wording will be used. The default wording is 'ARREARS/ADJUSTMENT.'

1. Select *Tools > Edit Arrears Wording*.
2. Edit the wording and close.

Edit Advance Wording

Edit Advance Wording changes the wording that displays on a notice when there is an amount paid in advanced. If left blank default wording will be used. The default wording is 'Prepayments & Discounts'.

1. Select *Tools > Edit Advance Wording*.
2. Edit the wording and close.

Edit Other Wording

Edit Other Wording changes the text used for *Other Charges*, for charges made to a lot using the *Other Invoice Code*, such as Arrears Notice Fees and other miscellaneous charges. If left blank default wording will be used. The default wording is 'Payment Services & Other.'

1. Select *Tools > Edit Other Wording*.
2. Edit the wording and close.

Edit Payment Instructions

Payment Instructions uses Field 60 in **Levy and Arrears Notice Templates** if an owner has a direct debit setup with StrataPay. The default wording is "Please make Cheques payable to: StrataPay plus your StrataPay Number." To edit the wording used when no direct debit is setup:

1. Select *Tools > Payment Instructions*.
2. Edit the wording and close.

Edit Direct Debit Instructions

Owners can set up a Direct Debit with StrataPay, and a file is sent to you regularly to be saved in the BCMax directory (instructions are provided in the email from StrataPay). This file will mark the lot as having a Direct Debit set up, and their Levy Notice will display wording based on the agreement with StrataPay.

The wording below is the standard wording that is created when StrataMax is installed. Direct Debit Instructions uses Field 60 in levy Notices and will overwrite any other wording (such as Payment Instructions) if the owner has the agreement in place.

There is an ordering in the wording above:

- The first line is if an owner has 'Auto Balance Due' set up which will draw the entire amount owing prior to the due date.
- The second line is if the owner initiates the direct debit to be drawn.
- The third line is if an owner has a set amount drawn at set a frequency.

Edit Arrears Due Date Words

This due date will apply to Arrears Notices and it will appear on the Deposit Slip of the notice.

1. Select *Tools > Edit Arrears Due Date Words*.
2. Edit the wording and close.

Edit Levy Due Date

This due date will apply to Levy Notices and it will appear on the Deposit Slip of the notice regardless of the Levy Due Date.

1. Select *Tools > Levy Due Date Words*.
2. Edit the wording and close.

Edit Prior Debit Words

1. Select *Tools > Prior Debit Words*.
2. Edit the wording and close.

Edit Prior Credit Words

1. Select *Tools > Prior Debit Words*.
2. Edit the wording and close.
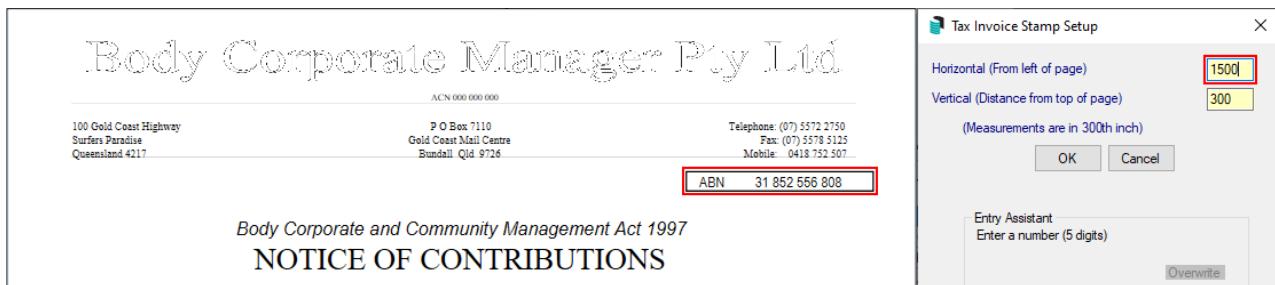
Tax Invoice Stamp Setup

If you are adding a *Tax Invoice Stamp* to the levy notices and need to adjust the location of the stamp, you can follow the steps below. This is only applicable if the building is registered for GST and the *GST Registered* field in the **Building Information** menu has a 'Y' in it.
If the building is not GST registered but an ABN is entered the Australian Business No. field in the **Building Information** menu, the ABN will display however the wording *Tax Invoice* will not.

1. Select *Tools > Tax Invoice Stamp Setup*.
2. Type in the new *Horizontal* and/or *Vertical* location as a distance measured from the left edge of the page. The measurement is in 300th of an inch, meaning 300 = 1 inch.
   - Tip: Try halving or doubling the number in the first instance to gauge how much difference it makes.

3. Click *OK*.
4. Print a test levy notice and check the new location is correct.

> The Tax Invoice Stamp does not print onto Arrears Notices as these are not considered Tax Invoices.

Split Levy Setup

A levy notice can be split by *Levy Invoice Code* and sent to another address. For example, in instances where the Admin Fund levies are paid by a third party, the Admin Fund can be shown, with arrears on a separate levy notice.

1. Search or select Levy Notice/ Reports.
2. Select Tools.
3. Select *Split Levy Setup*.
4. Click *Add* to add a new record.
5. Select the Account Code (02100001, lot number).
6. Select the Invoice Code for the levy that will be sent to the new contact. For example, if the notice for the Insurance fund levy is to be sent to a different contact, select the Invoice Code for the Insurance fund.
   - Use **Levy Management** to find the *Levy Invoice Code*.
7. Click *Select Contact* to select the recipient contact or to create a new contact.
8. Click *Save*.
9.
   - All Levy Invoice Codes NOT added in *Split Levy Setup* will report on the Levy Notice as per the Roll record for the Lot - Interest / Other / Special Levies / etc.
10. Close *Save*.

Produce Split Levy Notice - All Current Levies

1. Tag the Lot/s (tag all, Ctrl A) and Levies (tag current levies automatically, right click on the words

Select Levies tab).

2. Click *Proceed*.

> All Levy Invoice Codes NOT added in *Split Levy Setup* will report on the Levy Notice as per the Roll record for the Lot - Interest / Other / Special Levies / etc. For ease of setting up, use the *Split Levy* for the records that will require the least amount of data entry.

Produce Split Levy Notice - All Current Levies

Produce Levies for one fund only (Admin or Sinking). Note that all arrears will be produced along with the fund selected, giving the total outstanding not just the fund selected.

Tag the lot in *Select Lots* tab and then select the levy from *Select Levies* tab, *Conditions* tab, tick *Show Arrears* and click *Proceed*. The fund selected will be produced and will include any arrears for ALL funds.

Produce Split Levy Notice - One Current Fund plus Arrears

Produce Levies for one fund only (Admin or Sinking) and exclude any previous arrears amounts. Tag the lot in *Select Lots* tab and then select the levy from *Select Levies* tab, *Conditions* tab, untick *Show Arrears* and click *Proceed*. Only the fund selected will be produced and will exclude any arrears for any fund.

> Remember to ensure that you reselect *Show Arrears* and then produce the Levy Notice for the rest of the funds. i.e. Admin Fund.

> If you exclude Arrears on Levy Notices, this would not be normally done and you should ensure that you understand the implication of this setup.

> Note that Interest is only posted to the *Levy Invoice Code – Interest*– this will not be split against particular funds.

Add Extra Files for Levy Notice by Email

Adding extra files for levy notices that are sent by email can only be used when printing levy notices for an individual building - there is no option for a Global Levy process, however we would recommend using the *Email Template Setup* that will allow the body of the email to be edited.

1. Search or select **Levy Notice/ Reports.**

2. Click *Tools > Add Extra Files for Levy Notice by Email*

3. The 'Extra Attachments for Levy Notice' window will appear.

4. Click the *Add a File* or *Add from DocMax* button.

   - If *Add a File* was clicked, browse windows to locate the file.

   - If *Add from DocMax* was clicked, locate the file in DocMax and click the *Select Document* button in the top left of the DocMax ribbon.

5. The 'Extra Attachments for Levy Notice' window will appear again with the attachment listed. You can choose to add more attachments / files, or click the *Close* button.

6. Proceed to send the levy notices as per the usual process.

If needing to add additional attachments to a Levy Notice sent via Bing, you must print to the BING EasyPost Mailroom to access this functionality - further details in *Bing EasyPost Mailroom Process (Mailroom Instructions)*.