Levy Management, Arrears & Budget re-write

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This page contains information relating to the first stage of the Levy Management, Arrears & Budget rewrite released in *StrataMax version 5.6.135*. The first stage focused on providing an improved user interface & experience in Levy Management; while utilising new fields from Levy Invoice Code Setup to streamline the creation of new levies based on budgets. Detailed instructions on these changes can be viewed in our Release Notes. The Next Stages are also described below.

Released Features include:

- The ability to create new levies manually or by budget in Levy Management; when produced by budget for the levy year being proposed / approved at an AGM, the periods are calculated based on your budgets and the default fields in Levy Invoice Code Setup.
- The Create Transactions & Notice button functionality replaces Generate Levies, offering a streamlined interface that displays the transactions being created, while highlighting any potential issues & manages levies with due dates that do not meet legislative requirements.
- New interfaces for Configuration, Merged Levy Notice & Split Levy Setup.
- The Merge Notice functionality will be released after completing the levy notice stage. This feature
 will allow the Main Account Code to be set, determining the Lot Address displayed on the notice
 and the lot where the notice will be filed in DocMax.
- Split Levy will allow for contact card selection and notices to be emailed to non-owners if required.
- Effortlessly create and modify custom levy entitlement schedules for any building.
- Lot Entitlements can now be set, including decimal points; buildings using the current Entitlement Factor setting will be adjusted on upgrade.

Next Stages

The following stages of the Budget, Levy Management & Arrears re-write will focus on budgets & reporting. Some of the key aims are:

- Easy-to-use budget interface & new functions such as budget notes.
- Enhanced budget workflow from creating a proposed budget to approving the budget.
- Improved budget reporting, including proposed levies by lot.
- Enhanced meeting hub integration so levy information can merge into motions.

- Levy Distribution to use Report Distribution interface.
- Merge levy functions to be released to allow control over the Main Account (Primary Lot.)