

Levy Management, Arrears & Budget re-write

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This page contains information relating to stages of the Levy Management, Arrears & Budget re-write. 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.

Access will be progressively enabled allowing a smooth and supported transition. Early access can be granted to clients by simply logging a request with the StrataMax Support Team (support@stratamax.com) who will help coordinate timing.

For clients who have already have access and have this feature enabled, please refer to [Arrears Management - New](#).

The refreshed *Levy Arrears Management* is released as a *Preview Feature* meaning the legacy Arrears Notice interface can still be accessed if required.

Released Features

- 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.

Arrears Management (coming soon)

If you would like early access, please have your administrator log a request with our Support Team (support@stratamax.com) who will help coordinate timing.

The refreshed Levy Arrears Management is released as a *Preview Feature* meaning the legacy **Arrears Notice** screen can still be accessed if required.

Changes to arrears management will bring this process into the report distribution interface with all the functionality to be used from this screen, giving a more consistent interface that users would be familiar with. Some of the key changes include:

- Arrears notices will be sent using the **Report Distribution** interface this allowing access to functions already available from that interface such as attaching additional StrataMax reports and documents, sending SMS notifications etc.
- Levy Arrears Pre-issue report enhanced to report to excel for all selected buildings and include what arrears stage will be issued if arrears is processed.
- More flexibility for arrears fee setup with optional settings to configure arrears fees to only be charged to the building and not to the lot owner.

The screenshot shows a window titled "Arrears Fee Setup" with a question mark icon in the top right corner. The window is divided into two main sections, each with a checked checkbox and a title:

- Global Setup**:
 - Manager's Account Code: 08200016 ABC Strata Managers
 - Fee Account: 061003 ARREARS CLEARING ACCOUNT
 - Invoice Code: 18 - Default
 - Export to TRMax
 - GLMax Invoice Code: 26 - Arrears
 - Charge Building Only
 - Building Charge Code: (empty)
- Override Building Setup: Craig Keep**:
 - Manager's Account Code: 08200016 ABC Strata Managers
 - Fee Account: 061003 ARREARS CLEARING ACCOUNT
 - Invoice Code: 18 - Other
 - Export to TRMax
 - GLMax Invoice Code: 26 - Arrears
 - Charge Building Only
 - Building Charge Code: 15010 MANAGEMENT FEES - ADDITIONAL

At the bottom of the window, there are four buttons: "Export All", "Copy To Buildings", "Save", and "Cancel".

- Redesigned Arrears Setup interface displaying all the information within the one screen.

Arrears Notice Setup

Arrears Setup

Use earliest due date for overdue days calculation (Default is latest due date) [Fee Setup](#) [?](#)

Global Setup [+ Add Global Item](#)

Notice Type	Template	Deposit	Days Overdue	Min Amount (Arrears Fee	Ledger Card	Cover Letter
1	<input type="checkbox"/> Merge levyarr_adbcarr1_ABN	<input checked="" type="checkbox"/>	5	50.00	19.00	<none>	<none>
2	<input type="checkbox"/> Merge levyarr_adbcarr2_ABN	<input checked="" type="checkbox"/>	10	50.00	22.00	<none>	<none>
3	<input type="checkbox"/> Merge levyarr_adbcarr3_ABN	<input checked="" type="checkbox"/>	1	50.00	50.00	<none>	<none>

Use earliest due date for overdue days calculation (Default is latest due date) [Copy from Global](#) [+ Add Local Item](#)

Override Building Setup Craig Keep

Notice Type	Template	Deposit	Days Overdue	Min Amount (Arrears Fee	Ledger Card	Cover Letter

[Save](#) [Cancel](#)

- Redesigned *Arrears Manager* interface used to manually manage arrears flags, disable arrears notices for specific lots, identify why a lot may not be receiving arrears notices & clear all arrears flags (useful where required after a building transfer).

Arrears Manager - DIAMONDS FOREVER - KEEP 1563

Account Code	Lot	Unit	Account Name	Overdue	Balance	Arrears Notice Disabled	Last Arrears Notice	Legal Action	Notes	Issues
02100001	1	1	DEVELOPER	4,714.27	4,714.27	Yes	Enable	Date: 23/03/2026 Type: 3 Clear: Yes		Arrears Notice disabled
02100002	2	2		5,415.70	5,415.70	No	Disable	Date: 23/03/2026 Type: 3 Clear: Yes		
02100003	3	3		0.00	-945.38	No	Disable			
02100004	4	4		3,896.41	3,896.41	No	Disable	Date: 23/03/2026 Type: 3 Clear: Yes	Payment Plan	
02100005	5	5		5,146.42	5,146.42	No	Disable	Date: 23/03/2026 Type: 3 Clear: Yes		
02100006	6	6	Craig Jeffcoat	5,782.15	5,782.15	No	Disable	Date: 23/03/2026 Type: 3 Clear: Yes		Ownership recently changed

Include Accounts with Nil or Credit balance Arrears Notes Category: Levy Arrears

[View Log](#) [Clear All](#) [Close](#)

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.
- Merge levy functions to be released to allow control over the Main Account (Primary Lot.)