

Levy Management | FAQ

Last Modified on 10/12/2025 9:01 am AEST

With the changes to Levy Management, the below page includes some of the most frequently asked questions around how this area works.

The content in this article is applicable to *StrataMax version 5.6.135* and higher.

Levy Year

Q. What is a Levy Year?

A. The Levy Year is the levy periods that you are about to resolve at the upcoming AGM.

Q. When do I have to change my levy year?

A. In planning for the next AGM.

Q. My levy year is several years behind - do I have to update this for every building?

A. Not initially - only as each building prepares for AGM. You can edit the Levy Year to the required year. Watch our [video](#) on how to set the Levy Year to match the AGM levy decisions, where we demonstrate how to update the Levy Year.

Q. How does the Levy Year calculate the levies?

A. Tip is to hover over the levy period to see the calculation. Calculation is the annual rate per unit of entitlement (U/E) and distributed evenly across four quarters, or according to the number of instalments defined.

Rate = (Next Year Budget - Outstanding Levy Income / Entitlements / Remaining Instalments).

Budget

Q. If there is no Next Year Budget what is used to calculate the levies for periods in the next financial year?

A. Current Year Budget will be used to calculate the levy periods, however these can be edited if required.

Q. I need a report to show the quarterly proposed levies for each lot.

A. In **Levy Management**, produce the Levy Register - Quarterly for a breakdown report for each lot.

Levy Management

Q. What has Strike been replaced with?

A. Approve Levies.

Q. Where can I find the Levy Balance Control Report?

A. Levy Balance Control Report can still be produced from **Levy Notice/Reports** under *Options*. The **Levy Generation Schedule** can be used and this is a global report accessible in the *Reports* menu of **Levy Management**. When in the *Create Transactions and Notice*- there is also a preview of the levies about to be issued.

Q. How to enter \$0.00 levy in new **Levy Management**?

A. \$0.00 levies can be entered using Add - Manual, when the Gross Amount per U/E is 0.00 a validation box will appear and must be checked to confirm the levy is a \$0 levy (the Zero Levy checkbox will only show if \$0 amounts are entered into the rate per U/E or Gross Total Amount).

Create Levy - Craig Keep 354235

Invoice Code: 01 Admin Fund Regular

Entitlement Schedule: Entitlements (Entitlements: 3.0000)

Period: 01/10/2025 To 31/12/2025

Due Date: 01/10/2025 Due in 14 days

Gross Amount per U/E: 0.00000000 Gross Total Amount: 0.00

Rate 0 x 3.0000 entitlements (with rounding) = Gross Total 0.00

☒ Zero Levy

Discount Rate (%): 0

View Save Cancel

Q. How do I create Special Levy?

A. The Levy Invoice Code will need to be created or exist already in **Levy Invoice Code Setup** and have the *Type* set to 'Special'.

Q. Old levies are appearing in Levy Management and on Certificates; how can these be removed?

A. In **Levy Management** select Options and then Set Current Levies and untag any levies as required. The levies will still be available to report on and display in **Levy Management** by ticking Show Historical Levies.

Q. I am trying to enter levies for a new building using Add - By Budget and they are not being created.

A. Check **Levy Invoice Code Setup** for the Instalments. Review and set Base Building as required.

Used	Invoice Code	Income Account	Levy Description	Certificate (Balance) Field	Discount Code	Discount Account	Discount Description	Advance Account	Arrears Account	Sort Order	Posting Priority	Charge Interest
Type Levies (Regular) <input type="button" value="v"/>												
Admin Fund												
	Invoice Code:	01	Income Posting Account:	101		Description:	Admin Fund	Certificate Section:	68 - Administrative (re			
Discount												
	Invoice Code:	19	Income Posting Account:	1011		Description:	Admin Discount					
Levy Setup												
	Instalments:	4	Default Discount %:	0								
Advance & Arrears												
	Advance Reporting Account:	0961	Arrears Reporting Account:	0221								
Other												
	Sort Order:	1	Posting Priority:	6	Interest:	<input type="checkbox"/> Do Not Charge Interest						

Q. I would like to print a Levy Register Summary Report; how can this now be done?

A. The Levy Register is now two reports, so from **Levy Management** / Reports you can select from the two. Within the report distribution screen you can add the additional report so both are included if required and this may be saved as a report set for quicker access.

Levy Management - Craig Keep 354235

Options	Reports
Period	Distribute Levies
Financial	Levy Register
Levy Year	Levy Register Summary
	Levy Register Quarterly
# Period	Levy Generation Schedule

Q. Do you need to re-enter the custom schedule and owners on interest free list or do these get copied over?

A. This information will be included on upgrade.

Q. Where can we watch the Levy Management recording?

A. The webinar recording can be located on our [Live Sessions](#) article as well as under [StrataMax Videos](#).

Q. Is the levy year end rollover only available when you add new levies by budget (not manual)?

A. Yes, when you select *Add - By Budget* you can adjust the Levy Year. You can untag the levy periods being created if preferred.

Q. Can levies still be issued globally?

A. Yes, from [Create Transactions & Notice](#) in Levy Management you can select Buildings and tag all.

Q. Do the levy screens show inclusive of GST or exclusive of GST?

A. Levies to owners are always inclusive of GST.

NOTE: GST will be automatically applied to budget amounts for Net GST style buildings on Levy Year rollover.

Q. If you have custom schedules can you not add by budget? Does it have to be done manually?

A. Yes they will need to be created manually as the custom schedule is not available to be used adding from budget.

Q. When adding by budget what levy types can be used?

A. **Levy Invoice Code Setup** with a Type of (Regular) levies, which may include additional levies or Trading Fund levies.

Q. There is a message "Budget not set for accounts:" in **Levy Management**, what does this mean?

A. Budget Accounts that do not have any data entered in Budget Update will be displayed as a warning only in the *Add Levies by Budget* screen.

Budget not set for accounts: 1030101,1030101,1030102,1030102,102301,102301,102302,102302

Save

Cancel

Q. We previously used *Set Levy Notice Date* to enter levies issued by prior / previous managers, how is this now done?

A. When entering the levy information, use Prior Manager as the Type. The old Set Levy Notice was used to mark a levy as generated and was commonly used when buildings moved between managers and were loaded into StrataMax manually.

If old levies have not been generated; these should be investigated as to why and either set as a previous manager levy or generated if required or deleted from Levy Management. Tick Show Historical Levies to view all levies and to be able to access the edit and delete buttons.

Q. I need to issue an urgent special levy, the Due Date does not need to be adjusted / updated.

A. There is a setting for *Override Due Date Validation* which can be ticked to allow the Due Date to remain and not adjust on generation. See [Override Due Date Validation](#) for more information.

Levy Create Transactions & Notice

Generation Date: 25/08/2025 Adjust Due Date if before: 24/09/2025 ☐ Include Not Approved ☒ Override Due Date Validation

Filter Due Dates: To 09/10/2025 Buildings: 300621

	Building Number	Building Name	Fund	Period	Due	Approved	Total Amount	Less Discount	Status
	300621	STRATAMAX ONLINE HELP KEEP	SPECIAL ADMIN. FUND LEVY	01/11/24	01/11/2024	08/05/2025	6000.00	6000.00	⚠ Due date is before the minimum notice period
✓	300621	STRATAMAX ONLINE HELP KEEP	SPECIAL ADMIN. FUND LEVY	10/09/25	10/09/2025	12/08/2025	6000.00	6000.00	⚠ Due date is before the minimum notice period
	300621	STRATAMAX ONLINE HELP KEEP	LEVIES - ADMINISTRATIVE FUND	01/05/24 to 31/07/24	01/05/2024	01/05/2024	3300.00	3300.00	⚠ Due date is before the minimum notice period
	300621	STRATAMAX ONLINE HELP KEEP	LEVIES - ADMINISTRATIVE FUND	01/08/24 to 31/10/24	01/08/2024	01/05/2024	3300.00	3300.00	⚠ Due date is before the minimum notice period
	300621	STRATAMAX ONLINE HELP KEEP	LEVIES - ADMINISTRATIVE FUND	01/11/24 to 31/01/25	01/11/2024	01/05/2024	3300.00	3300.00	⚠ Due date is before the minimum notice period
	300621	STRATAMAX ONLINE HELP KEEP	LEVIES - ADMINISTRATIVE FUND	01/02/25 to 30/04/25	01/02/2025	01/05/2024	3300.00	3300.00	⚠ Due date is before the minimum notice period
	300621	STRATAMAX ONLINE HELP KEEP	LEVIES - ADMINISTRATIVE FUND	01/05/25 to 31/07/25	01/05/2025	12/08/2025	330.00	330.00	⚠ Due date is before the minimum notice period
	300621	STRATAMAX ONLINE HELP KEEP	LEVIES - ADMINISTRATIVE FUND	01/08/25 to 31/10/25	01/08/2025	12/08/2025	330.00	330.00	⚠ Due date is before the minimum notice period

Distribute Start Close

Q. How to update the Approved / Determined date for a future non Generated Levy Period?

A. To update the Approved / Determined Date for a Levy Period, click the *Edit* button on the levy and then *Save* without making changes, then click *Approve* and the levy will be available so the Approve Date can be changed.

Q. How can I update the message displayed on the Levy Notice?

A. Use **Message Maker** icon and select Levy Notice to add/ edit the message on the Levy Notice.

Q. Does the Levy Register Quarterly Reports show Insurance levies.

A. Yes.

Q. Can I enter a credit levy into **Levy Management**?

A. Yes, when adding the manual period using the standard entitlement schedule(s), use the "-" symbol to create the credit, approve and create transactions and notice as necessary.

Create Levy -

Invoice Code: 01 Admin Fund Regular

Entitlement Schedule: Contribution Entitlements (Entitlements: 33019.0000)

Determined Date: 10/12/2025

Period: 01/05/2026 To 31/07/2026

Due Date: 01/05/2026 Due in 142 days

Gross Amount per U/E: -0.51868106 Gross Total Amount: -17,126.35

Rate -0.51868106 x 33019.0000 entitlements (with rounding) = Gross Total -17126.35

Discount Rate (%): 0

☐ Disable Interest

View Save Cancel

Levy Notice Distribution

Q. Where can I find a copy of a sent Levy Notice?

A. Levy Notices are saved to **DocMax** and can have a Profile set when *Save to DocMax* option is ticked in Report Distribution allowing Levy notices to be stored to a specific Category. Levy Notices can also be viewed from the Roll Document List shortcut in the **Roll** - note you can highlight and select multiple to send at once using SHIFT or CTRL keyboard buttons to highlight, and then right click to Email or Print. From version 5.6.139 the new Stored Reports will be available which will include documents from the old Stored Reports and also documents stored in DocMax that were created from Report Distribution with Save Report ticked.

Q. When agents are being sent levy notices; how can we ensure the owner receives a duplicate notice?

A. This can be done one of two ways; depending on if you wish to manage this on a global basis or lot by lot. Duplicate notices are only sent to owners who have their levy distribution preference set to Email.

Lot by lot Basis - Ensure the setting in Distribute Levies under the filters 'Duplicate - Email copy to

owner' is unticked as this is only used if wanting it applied globally. Then within the specific lots who want a duplicate sent tick the 'Copy to Owner (Duplicate Notice)'.

Edit Correspondence Preference

☐ Advertising OK?

☐ Send Notice of Committee Meeting

☐ Send Minutes of Committee Meeting

☐ Send Correspondence to Agent, Mortgagee or Other

☒ Send Levy Notices to Agent, Mortgagee or Other

Recipient: #House Springwood - Real Estate Agent

☒ Copy to Owner (Duplicate Notice)

Save Cancel

Global Basis - In Distribute Levies under the filters ensure 'Duplicate - Email copy to owner' is ticked.

Report Distribution - Craig Keep 354235

Levy Notice

Building: Craig Keep 354235

Report Set: Levy Notice [Inote_208] Levy Notice + Extra Levies + Ledger on 2nd Page

Page Numbers Consolidate by Contact

Report Attachment

Distribution Method

☒ Post Print to Evernote

☒ Email Levy Notice

☒ Save Report Levy

☒ Use Preferences Levy Notice

Filters

Committee Member: All Exclude Only

Lot Type: ☒ Include Car Spaces ☒ Include Storage Spaces

Duplicate

☒ Email copy to owner

Include Only: ☐ Committee Meeting Minutes ☐ Committee Meeting Notices ☐ Owner Occupied ☐ Advertising OK ☐ Intro Letters Not Sent

<input checked="" type="checkbox"/>	Account	Lot	Unit	Name	Behalf Of	Post	Email	Sms
<input checked="" type="checkbox"/>	02100001	1	1	#House Springwood	Craig Jeffcoat		1@1.com	
<input checked="" type="checkbox"/>	02100002	2	2	STRATAMAX PTY LTD			accounts@stratamax.com.au	
<input checked="" type="checkbox"/>	02100002	2	2	#House Springwood	STRATAMAX PTY LTD		1@1.com	
<input checked="" type="checkbox"/>	02100003	3	3	#House Springwood	Craig Jeffcoat		1@1.com	

Log Proceed Close

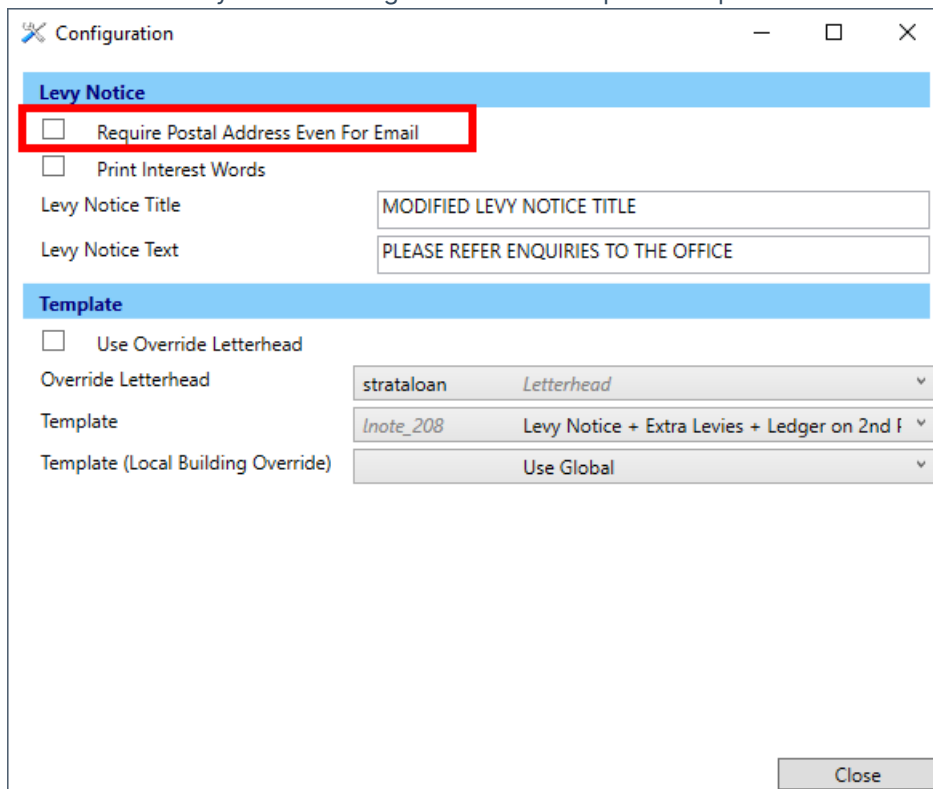
Q. How to issue a Levy Notices for multiple buildings generated on a previous day (Re-Issue Levy Notices)?

A. Adjust your Working Date back to the date of Generation. Then from **Levy Notice / Reports** click **Select Buildings** and tag All / Proceed.

Q. When levy notices are produced and emailed; sometimes the postal address is not appearing why is this?

A. The postal address will not displayed when emailed when the lot includes multiple contacts with postal addresses. From version 5.6.139 if you wish to include the postal address of the first contact on

the roll in the Levy Notice configuration tick the option 'Require Postal Address Even for Email'.



The screenshot shows a 'Configuration' window with a 'Levy Notice' section. In this section, the checkbox 'Require Postal Address Even For Email' is highlighted with a red rectangular box. Below it is the 'Print Interest Words' checkbox. Further down are text input fields for 'Levy Notice Title' (containing 'MODIFIED LEVY NOTICE TITLE') and 'Levy Notice Text' (containing 'PLEASE REFER ENQUIRIES TO THE OFFICE'). The 'Template' section below contains the 'Use Override Letterhead' checkbox and three dropdown menus: 'Override Letterhead' (showing 'strataloan' and 'Letterhead'), 'Template' (showing 'lnote_208' and 'Levy Notice + Extra Levies + Ledger on 2nd f'), and 'Template (Local Building Override)' (showing 'Use Global'). A 'Close' button is located at the bottom right of the window.

Levy Management & Meeting Hub

Q. We often have to manually populate information on meeting notices which can result in human error; does meeting hub allow merging of levy information?

A. Meeting Hub includes merge fields relating to unstruck (not approved) and struck (approved) levies. Ensuring your levy year matches the levies being voted on the AGM helps make the process as efficient as possible.

Standard Motions should be setup to suit your needs based on how many interim levies are used & for GST registered and non GST registered buildings. For example, a building that has an AGM during the first quarter of a financial year may use a motion similar to the below (as this would have one interim levy), where as a building that has an AGM during the second quarter of a financial year may use a different standard motion with two rows of struck levies and four rows of unstruck levies (as this would have two interim levies).

Example of a standard motion; in the below example the first row of levies is using the struck merge field category as this is the levy approved at the last AGM, and the remaining four rows use the unstruck merge field category as these levies are waiting to be approved at the AGM.

That the proposed administrative fund budget of **This Years Budget (101)** plus GST be adopted for the next 12 months and that contributions be levied on owners in accordance with the following table:

Levy Period	Amount per U/E	Total Amount	Due Date
Period (01, 1)	Rate per U/E (01, 1)	Total Gross Charge (01, 1)	Due Date (01, 1) <i>(Already Issued)</i>
Period (01, 1)	Rate per U/E (01, 1)	Total Gross Charge (01, 1)	Due Date (01, 1)
Period (01, 2)	Rate per U/E (01, 2)	Total Gross Charge (01, 2)	Due Date (01, 2)
Period (01, 3)	Rate per U/E (01, 3)	Total Gross Charge (01, 3)	Due Date (01, 3)

And further that the committee be authorised to issue interim levy for the next financial year in accordance with the following table:

Levy Period	Amount per U/E	Total Amount	Due Date
Period (01, 4)	Rate per U/E (01, 4)	Total Gross Charge (01, 4)	Due Date (01, 4)

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In the below example; prior to the AGM the levy year has been rolled to create the required levies.

Levy Management - WESTERN HEIGHTS 24323

Options Reports Feedback ?

Period

Financial Year: 01/01/2025 to 31/12/2025

Levy Year: 01/04/2025 to 31/03/2026

Entitlements

Contribution Entitlements: 14,0000

Interest Entitlements: 14,0000

Levy Year Totals

Total: 29,243.76

Less Discount: 25,531.24

View

Group By: Levy Name

☐ Show Historical Levies

#	Period	Rate per U/E	Due Date	Discount Rate	Discount Date	Generation Date	Approved Date	Entitlement Schedule	Total Charge	Less Discount
01 Admin Fund Total: 13,749.96 Less Discount: 11,687.34 Budget (Current): -10,000.00 Budget (Next): 0.00 Instalments: 5 / 4										
41	01/01/25 to 31/03/25	160.00	01/01/25	15.00	01/01/25	01/12/24	03/02/25	Contribution Entitlements	2,240.00	1,904.00
<div>Reverse Edit View Lot Charges</div>										
44	01/04/25 to 30/06/25	208.57	01/04/25	15.00	01/04/25			Contribution Entitlements	2,919.98	2,481.92
45	01/07/25 to 30/09/25	208.57	01/07/25	15.00	01/07/25			Contribution Entitlements	2,919.98	2,481.92
46	01/10/25 to 31/12/25	208.57	01/10/25	15.00	01/10/25			Contribution Entitlements	2,919.98	2,481.92
47	01/01/26 to 31/03/26	196.43	01/01/26	15.00	01/01/26			Contribution Entitlements	2,750.02	2,337.58
07 Sinking Fund Total: 10,999.80 Less Discount: 9,349.90 Budget (Current): -8,000.00 Budget (Next): 0.00 Instalments: 5 / 4										
42	01/01/25 to 31/03/25	142.50	01/01/25	15.00	01/01/25	01/12/24	03/02/25	Contribution Entitlements	1,995.00	1,695.68
48	01/04/25 to 30/06/25	162.02	01/04/25	15.00	01/04/25			Contribution Entitlements	2,268.28	1,928.08
49	01/07/25 to 30/09/25	162.02	01/07/25	15.00	01/07/25			Contribution Entitlements	2,268.28	1,928.08
50	01/10/25 to 31/12/25	162.02	01/10/25	15.00	01/10/25			Contribution Entitlements	2,268.28	1,928.08
51	01/01/26 to 31/03/26	157.14	01/01/26	15.00	01/01/26			Contribution Entitlements	2,199.96	1,869.98

What is merged into the motion; motions can be edited further if required. Additional fields are available if required.

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That the proposed administrative fund budget of \$10,000.00 plus GST be adopted for the next 12 months and that contributions be levied on owners in accordance with the following table:

Levy Period	Amount per U/E	Total Amount	Due Date
01/01/25 to 31/03/25	160.00	\$2,240.00	1 January 2025 <i>(Already Issued)</i>
01/04/25 to 30/06/25	208.57	\$2,919.98	1 April 2025
01/07/25 to 30/09/25	208.57	\$2,919.98	1 July 2025
01/10/25 to 31/12/25	208.57	\$2,919.98	1 October 2025

And further that the committee be authorised to issue interim levy for the next financial year in accordance with the following table:

Levy Period	Amount per U/E	Total Amount	Due Date
01/01/26 to 31/03/26	196.43	\$2,750.02	1 January 2026

p

114 words

Removed items

Configuration

Add GST to budget amounts at year end rollover
 Suppress rationalisation for current building
 Always show list of levies
 Allow period date override
 Minimum Arrears Amount - moved to Arrears Notice config

GoTo

Change Levy Code
 Levy renumber
 Edit Levy Paid Dates
 Levy Balance Control Report is only applicable at the time the levy is generated
 Transfer Credit Funds