

Levy Management | FAQ

Last Modified on 25/08/2025 1:00 pm 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. You don't need to enter a levy if there is no amount (zero levy) for the period, you can just enter the next chargeable period.

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

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 / Levy Register from the Report Distribution screen click *Report* and add *Levy Register Summary*. In version 5.6.137 the Levy Register Summary report has been added to the **Levy Management** / Reports menu.

Levy Register

Building:

Accounts:

Report Set:

☐ Page Numbers
 ☒ Consolidate by Contact

Levy Register [levyregister_default] Levy Register Report

Levy Register Summary [levyregistersummary_default] Levy Register Summary Report

+ Report

Attachment

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?

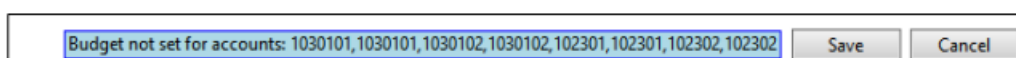
A. Yes they will need to be created manually as the custom schedule is not available to be used adding from budget.

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.



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. Levy Notices used to show in Stored Reports, where are they now?

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.

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.

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

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).

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)

Levy Management - WESTERN HEIGHTS 24323

Options
Reports

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
									Reverse	Edit
									View Lot Charges	
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.

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

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