

# Levy Management - Common Process

Last Modified on 11/08/2025 2:34 pm AEST

This article outlines a recommended process for managing levies in **Levy Management** from budget entry through to generation after an AGM. Following these steps will help ensure accurate records, clear reporting, and a smooth global process.

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

## Before the AGM

### 1. Enter Budgets

- Complete your **Budget Update** entry.

### 2. Enter Levies by Budget

- In **Levy Management**, enter levies by budget for the upcoming financial year using *Add - By Budget*.
- Ensure the **Levy Year** covers the full 12 months of levies being approved at the upcoming AGM.
- Leave the *Approval Status* as not Approved.
  - These levies will not be generated, will not appear on Certificates, and can be reported on.

### 3. Produce Reports for AGM Preparation



Generate and review the following reports for Committee and Owners:




- **Budget Report**
- **Levy Register Summary**
- **Levy Register (Quarterly)** (Ensure *Proposed Levies Only* is selected in the Configuration cog wheel).

**Tip:** Create a *Report Set* in Report Distribution containing your preferred reports for quick access.

**Levy Register (Quarterly)**

Building:  ... Accounts:  ...

Report Set:    ☐ Page Numbers ☒ Consolidate by Contact

	Financial Statements [financials_proposedbudget_noletterhead] Proposed Budget Repor	▲ ▼ ⚙️ ✖️
	Levy Register Summary [levyregistersummary_default] Levy Register Summary Report	▲ ▼ ⚙️ ✖️
	Levy Register (Quarterly) [levyregister_qtr] Levy Register (Quarterly)	▲ ▼ ⚙️

## After the AGM

### 4. Approve Levies

- In **Levy Management**, [Approve](#) the relevant levies.
- Set the Approved Date to the date of the AGM.
- If any amendments were made during the AGM:
  - [Edit the levies](#) accordingly before approving.

### 5. Generate and Issue Levies

- Produce a [Levy Generation Schedule](#) report to check levies across the portfolio. Then once approved, proceed to generate and issue the levies, which includes a preview before sending the levies using [Create Transactions & Notice](#).