Global Levy Generation Process

Levies can be generated for a single building or all buildings in the portfolio using the global process. Below are instructions on generating levies already entered into StrataMax in **Levy Management.**

Levies can only be generated once they have been struck (refer to our article on Strike Levies) and have not already been generated. Levies are billed to the Owner when generated, allowing the Levy Notices to be sent using delivery preferences.

Before completing this process, it is recommended that the settings, messages, etc., are checked before automatically printing the Levies, and for new buildings, the bank account information has been entered. Follow our step-by-step process as a guide to Global Levy Generation.

The content in this article is applicable to *StrataMax version 5.6.134* and below. For *StrataMax version 5.6.135* and above, please refer to the more recent **Levy Management** article.
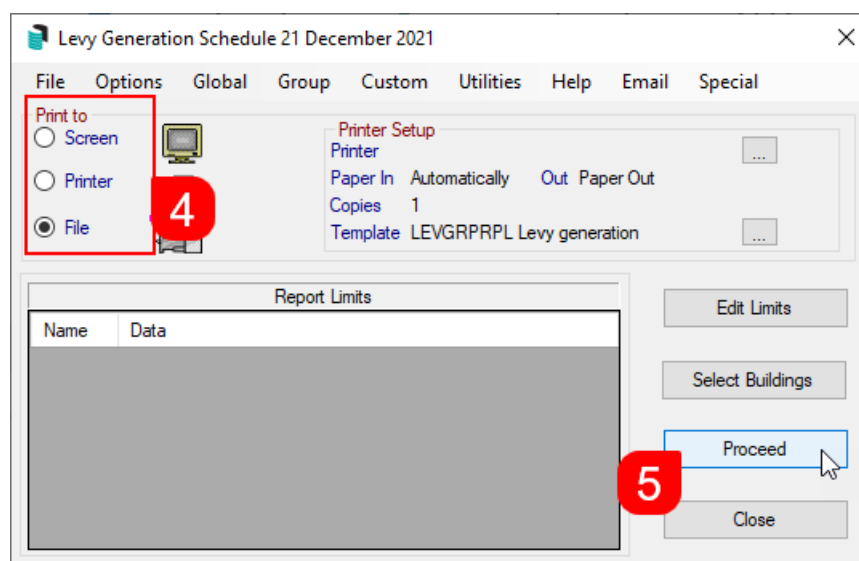
1. Levy Generation Schedule Report

The *Levy Generation Schedule* produces a report on levies that have been entered into StrataMax. This can be used to report on levies which have not been generated within a specific period. In this report, if a building has no next year, levies noted, and a *Levy Year End Roll Over* has not been completed, the first levy of the year will be reported in grey with an asterisk. *Levy Generation Schedule* is a group report and will print one consolidated report of the information for the buildings tagged, and is available in Excel.

1. Search or select **Reports / Utilities Global**.
2. Select *Group > Levy Generation Schedule > OK.*
3. Click *Select Buildings,* then tag all required buildings (Ctrl + A for all) and click *OK*.
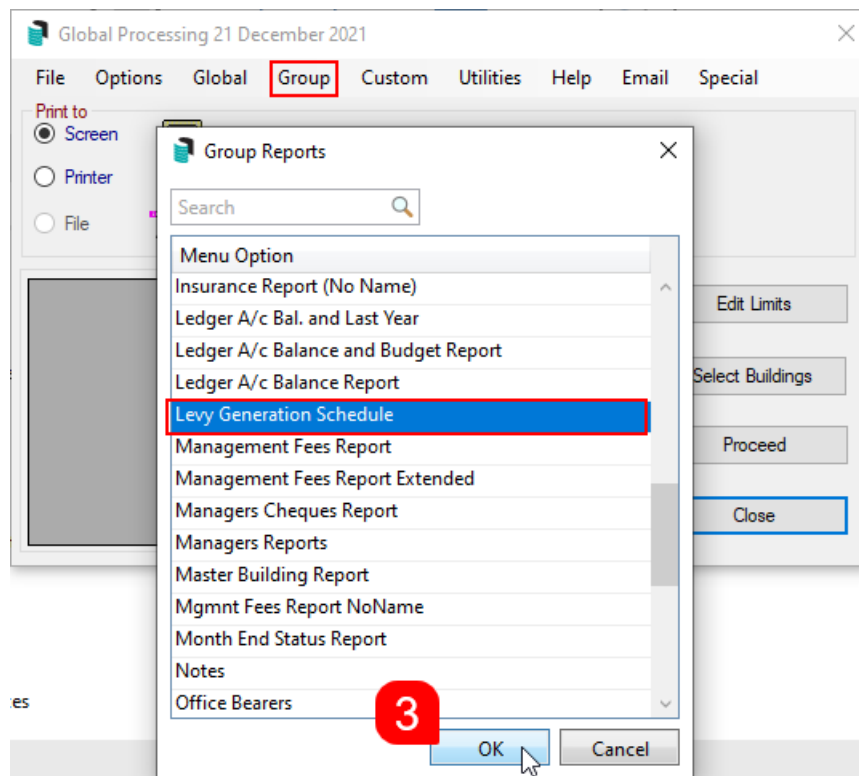
4. Select to 'Print to' *Screen*, Printer, or file (Excel).

5. Click *Proceed,* and the 'Levy Generation Schedule Setup' window will appear where you enter the required settings.
   - *Start Due Date:* The starting date range for the levy due date.
   - *Finish Due Date:* The finishing date range for the levy due date.
   - *Style:* A variety of options to suit your requirements. To assist with a 'Global Levy Generation' select 'All Not Generated'.
   - *Report Order:* A variety of options to suit your requirements.
6. The report or Excel sheet will appear on screen identifying the building(s) within the set parameters

and sort preference.

- If *Screen* or *Printer* was selected in the 'Print to' section, on the bottom of the report a message will appear regarding the asterisks, meaning the period is an anniversary levy.
- If *File* (Excel) was selected, then there will be an 'Anniversary Levy' column to the far right to indicate this as well.

2. Review Levy Notice/Report Settings

It is recommended to review the **Levy Notice/Report** Conditions Tab settings prior to completing a Global Levy Run to ensure the required configurations are set, this is important if different users might complete this process.

1. Search or select **Levy Notice/Reports**.
2. Click the *Conditions* tab.
3. Review settings; in particular *E-Mail Where Set, Email/Mail as per Contact Preferences* & *Print Message,* and check the Printer and ensure settings are saved as Default.
4. If this is your first Levy Generation also review the Email Template Setup & Email Signature.

3. Global Levy Generation

A Levy can be generated for one building or multiple buildings based on the Set Levy Tag Conditions. To generate Levies for one building, refer to Generate Levies for a Single Building instructions. Prior to conducting a Global Levy Generation, check the Levy Generation Schedule to ensure that the Levies that will generate are as expected.

1. Search or select **Levy Management**.

2. Select the *Generate* tab.

3. Click *Change Building* & Tag All Buildings (or selected buildings, as required).

4. Click *OK*.

5. The levies due for generation which meet the Set Levy Tag Conditions will be automatically tagged.

6. Set *Auto Print Levy Notices after Generation & Use current active global message* if applicable.

7. Click *Generate*.

8. A reminder message will display 'Levy Balance Control must be printed before generation. Are you sure you want to proceed?' Click *Yes. (Levy rates would normally be approved and checked on entry after AGM).*

9. Click on *Confirm Generation* to continue.

10. Levies will now be generated and the Levy Notices will automatically print if configured to.

Note: To print Levy Notices automatically after generation, click *Auto Print Levy Notices after Generation* (leave unchecked to print Levy Notices separately). If printing separately Levy Notices must be printed on the date of Generation if completing a Global Levy print run.

Click *Use current active global message* if a message needs to be added - configured in **Levy Notice/Reports** > Conditions tab - Print Message must be ticked.

Important Note regarding printing Levy Notices

Levy Notices may be printed / emailed separately, rather than at the time of Levy Generation. However if Levy Notices are not set to print automatically during this global process (using the Auto Print setting), those levies can be printed through *Levy Notices/Reports* following the instructions for Print Levy Notices for a Building and tagging multiple buildings using Change Building. However, if the levies are not printed on the day that they were generated, either automatically or through Levy Notices/Reports then those levies will need to be printed individually for each building.

Please note that if reprinting a Levy Notice that has been generated and sent to an owner, this can be retrieved from *Stored Report* as this will have the original print date.

4. View Log

On completion of the levy generation and levy printing it is recommended to view the log to identify any properties which may require further review or action.

1. Search or select *Levy Management*.
2. Click *View Log*.
3. Typically the log would be reviewed or printed, entries dealt with and the log file added to history using the *Add Log File to History* button to keep a record of what occurred. This can log can be viewed in Excel or Notepad.