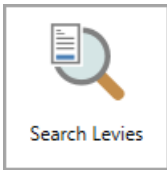


Search Levies

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The instructions in this article relate to **Search Levies**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Levies is used to search and report on levy information for a property. It returns levy data based on selected values and can include the default **Account Code** and **Invoice Code** fields, along with other available levy fields.

This search can assist with everyday tasks such as reviewing levy items for a building, checking levy information for selected lot account codes, and preparing data for reporting. The results can be saved for reuse, exported to Excel, or produced as a PDF-style document if required.

Searches

Many [search screens](#) use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

Search Levies | Security

To access **Search Levies**, the user must have permission set to *Allow* for *Search Levies* under the *Menus* category in [Security Setup](#).

Search Levies | What it can report on

Search Levies can be used to report on levy information recorded for a property, including values returned by fields such as account code, invoice code, due date, amount, and other available levy-related fields.

This makes it useful when reviewing levy items across a building, checking levy information for selected account codes, or preparing levy data for reporting and further analysis.

Search Levies | Recommended search examples

Review levy items across the building

This search can be used to review invoice and levy items across the building by adjusting the default field selection.

1. Search for or select **Search Levies**.

2. By default, *Account Code* and *Invoice Code* will be applied.
3. If required, remove *Invoice Code* using the red minus button, or change it to a different field to display invoice and levy items across the building.
4. If required, add another field using the green plus button.
5. Click *Refresh* to view the results.

Account Code	Account Description	Levy No	Invoice Code Description	Start Date	End Date	Amount	Discount	Discount Date	Generation Date	Due Date	Paid Date
02100001	Alison Smith & SMITH PETER	00004	Admin Fund Special	01/11/2024		1,000.00				01/11/2024	
02100002	Brown and PUKA	00004	Admin Fund Special	01/11/2024		1,000.00				01/11/2024	
02100003	Bertie Bubbles	00004	Admin Fund Special	01/11/2024		1,000.00				01/11/2024	
02100004	Coco Chanel	00004	Admin Fund Special	01/11/2024		1,000.00				01/11/2024	
02100005	Professor Dave Danger	00004	Admin Fund Special	01/11/2024		1,000.00				01/11/2024	
02100006	S Stewart and M Marbles	00004	Admin Fund Special	01/11/2024		1,000.00				01/11/2024	
02100001	Alison Smith & SMITH PETER	00003	Admin Fund	01/07/2022	30/09/2022	1,000.00			30/11/2024	31/07/2023	30/11/2023
02100002	Brown and PUKA	00003	Admin Fund	01/07/2022	30/09/2022	1,000.00			30/11/2024	31/07/2023	
02100003	Bertie Bubbles	00003	Admin Fund	01/07/2022	30/09/2022	1,000.00			30/11/2024	31/07/2023	
02100004	Coco Chanel	00003	Admin Fund	01/07/2022	30/09/2022	1,000.00			30/11/2024	31/07/2023	
02100005	Professor Dave Danger	00003	Admin Fund	01/07/2022	30/09/2022	1,000.00			30/11/2024	31/07/2023	
02100006	S Stewart and M Marbles	00003	Admin Fund	01/07/2022	30/09/2022	1,000.00			30/11/2024	31/07/2023	
02100001	Alison Smith & SMITH PETER	00002	Admin Fund	01/04/2022	30/06/2022	1,000.00			30/11/2024	01/05/2023	30/11/2023
02100002	Brown and PUKA	00002	Admin Fund	01/04/2022	30/06/2022	1,000.00			30/11/2024	01/05/2023	
02100003	Bertie Bubbles	00002	Admin Fund	01/04/2022	30/06/2022	1,000.00			30/11/2024	01/05/2023	
02100004	Coco Chanel	00002	Admin Fund	01/04/2022	30/06/2022	1,000.00			30/11/2024	01/05/2023	
02100005	Professor Dave Danger	00002	Admin Fund	01/04/2022	30/06/2022	1,000.00			30/11/2024	01/05/2023	
02100006	S Stewart and M Marbles	00002	Admin Fund	01/04/2022	30/06/2022	1,000.00			30/11/2024	01/05/2023	
02100001	Alison Smith & SMITH PETER	00001	Admin Fund	01/01/2022	31/03/2022	1,000.00			30/06/2022	01/01/2022	15/05/2022
02100002	Brown and PUKA	00001	Admin Fund	01/01/2022	31/03/2022	1,000.00			30/06/2022	01/01/2022	
02100003	Bertie Bubbles	00001	Admin Fund	01/01/2022	31/03/2022	1,000.00			30/06/2022	01/01/2022	

Report on levy information for selected account codes

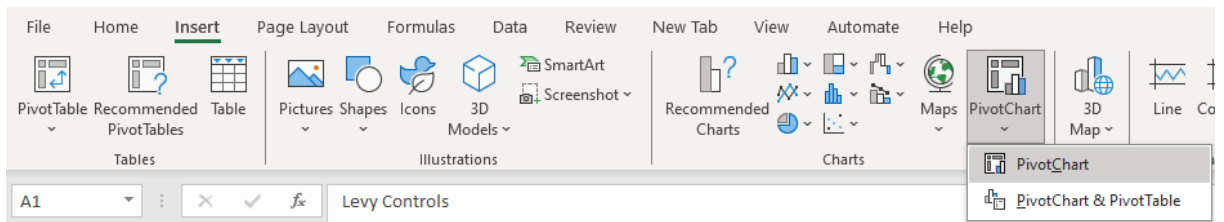
This search can assist with reviewing levy information for one or more selected lot account codes.

1. Search for or select **Search Levies**.
2. Use *Account Code* as the search field.
3. Set the *Condition* to *is any of*.
4. Select the required account codes in *Value*.
5. If required, remove a selected code by clicking the red cross beside the code.
6. Click *Refresh* to view the results.

Export levy data to Excel for further reporting

This search can be used to prepare levy data for Excel reporting by selecting the required fields and exporting the results.

1. Search for or select **Search Levies**.
2. Select the fields required for the report, such as *Due Date*, *Invoice Code Description*, and *Amount*.
3. If more than 1000 records are required, change the maximum number of records in *Advanced*.
4. Click *Refresh* to view the results.
5. Click *Export* to open the data in Excel.



6. From the PivotChart Fields section on the right drag the relevant fields to the required area
 1. Invoice Code Description to the Legend (Series) area.
 2. Amount to the Values area.
 3. Due Date to the Axis (Categories) area.

Once the above steps are completed the chart will look similar to below. Pivot Charts can be customised in many ways; some handy tips include:

- o To change the chart type to line graph or another type of chart for instance; right click on the chart and select Change Chart Type.
- o To display the amounts as \$; right click on 'Sum of Amount' at top left of chart and select Value Field Settings and click on Number Format and then select Currency and *OK*.
- o To customise the chart colouring etc, right click on the chart and select Format Plot Area and make changes as required.
- o To remove particular Levy Codes, click on the Invoice Code Description legend on the chart and edit the filter as required.

