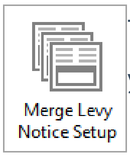
Merge Levy Notice Setup

Last Modified on 01/07/2025 3:14 pm AEST



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

Please note the content in this article relates to the StrataMax Pilot version. For previous versions of StrataMax, please refer to Merge Levy Notice Setup.

Merge Levy Notice Setup is for selecting lot owners within a selected building to be grouped together on the one levy notice as well as correspondence to be merged to one contact using Report Distribution This is useful for any lots still belonging to the original developer and for grouping lots which are all owned by one person, company or other entity. If a lot is sold, when the Change of Ownership is completed the lot will automatically be removed from the ***Merge Levy Notice Setup*** menu.

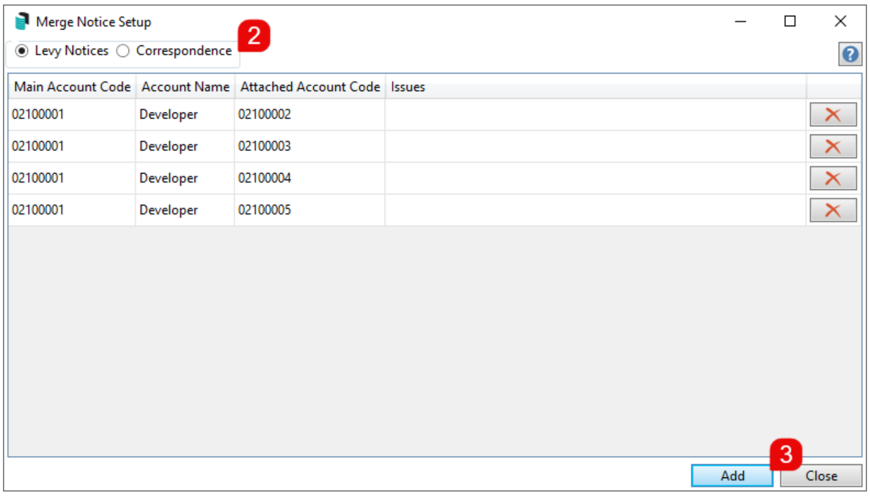
A combined levy notice with one deposit slip will be produced for the lots grouped in Merge Levy Notice Setup, with one StrataPay reference number to be provided to the owner. The Main Account Code is where the levy notice will be stored against in *DocMax* and the Main Account Code is what will be used on the levy notice. If a DDR is required, the original Lot Accounts StrataPay Reference Numbers will need to be used, not the combined merged levy.

The ***Bank Reconciliation*** will automatically allocate the payment across the merged lots.

Adding a Merged Levy Notice Setup

1. Search or select ***Merge Levy Notice Setup***.
2. Set Levy Notices or Correspondence by clicking the applicable radio button and click *Add*.
3. Click on the Lot account to setup and click *OK*.
4. In the next screen, tag the remaining accounts to be included in the merge and click *Ok*. The first lot in order of lot numbers will be selected as the Main Account Code.

- The Main Account Code is where the levy notice will be stored against in *DocMax*.
- The Main Account Code is what will be used on the levy notice.

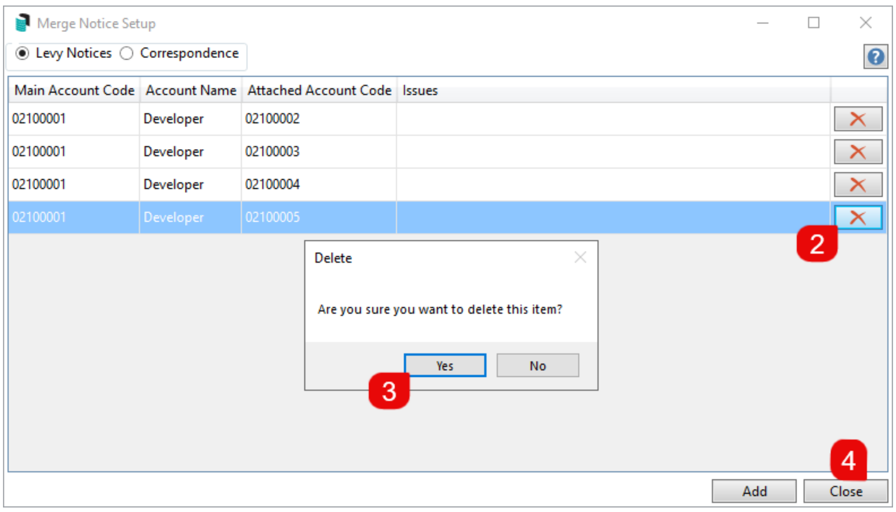


> ***Note*** - You will only be able to merge lots with owner details that are identical - this safeguards against accidentally selecting an incorrect lot. A warning message "Different contacts" will appear if the contacts do not match.

Delete a Merge Levy Notice Setup

You can delete individual accounts, or delete all by actioning the below.

1. Search or select ***Merge Levy Notice Setup***.
2. Click the 'X' beside a record to remove the account. Click the 'X' beside each of the records to remove the setup entirely.
3. Click *Close.*



***Note**: If a Change of Ownership is completed in the Roll for one of the lots grouped in Merge Levy Notice Setup, the lot will be automatically removed.*