Levy Management - Common Process

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.

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.

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.