

Change a Levy Description

This article will assist you to change a Levy Description on a Levy, for example, you may need to change the description from Standard Levy Quarter 1 to Levy 1 July 20xx to 30 Sept 20xx.

Note that once a Levy Notice has been saved in your Document Management System or File Smart, the saved document will not change. **You cannot change the description on an already Posted Levy by Bulk.**

Bulk Change

Previously posted levies will have to remain as they are, however you can change the description of levies you are in the process of posting.

1. Go to the Levy icon and select 'Calculate Levies'. If you are entering these levies for the first time, you will enter the information as normal. At this point, you can enter a General Description or if one instalment, you can enter a description specific to that instalment. To adjust the instalment descriptions, tick the advanced box.

3. The advanced screen opens as below.

Instalment	Due date	Admin	Capital Works	Total	Phantom	Previously posted	Description
1	01/10/2021	\$4,000.00	\$500.00	\$4,600.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly Admin/Sinking Levy
2	01/01/2022	\$3,066.67	\$533.33	\$3,600.00	<input type="checkbox"/>	<input type="checkbox"/>	Quarterly Admin/Sinking Levy
3	01/04/2022	\$3,066.67	\$533.33	\$3,600.00	<input type="checkbox"/>	<input type="checkbox"/>	Quarterly Admin/Sinking Levy
4	01/07/2022	\$3,066.66	\$533.34	\$3,600.00	<input type="checkbox"/>	<input type="checkbox"/>	Quarterly Admin/Sinking Levy

4. If you open the screen and any previously posted levy is visible, then that levy may duplicate. You would have to go to Accounting > Adjustments > Search/cancel Levy Posting. Note that all of these changes/cancellations will show on the owners ledgers. The best course of action is to change the first date of instalment to exclude that previously posted levy.

As a precaution, ensure you have created a back up that you can restore to, prior to posting levies.

5. If the instalments are editable, and have not yet been posted, double click at the end of the existing text to add or single click and it will overtype existing text

Description
Quarterly Admin/Sinking Levy
Quarterly Admin/Sinking Levy

6. Add the required dates.

Description
Quarterly Admin/Sinking Levy
Quarterly Admin/Sinking Levy January to March 2022

7. Print the Summary as normal and then Post the Levies.

Change to an Individual Lot

1. Go to Accounting > Adjustments > Levy Journal

2. Enter Lot and Plan or use Name etc to access required Lot records.

3. Click edit and highlight the Levy that requires a description change.

Date Due	Levy Type	Admin Debt	Admin Paid	Capital Works ...	Capital Works ...	Other Debt	Other Paid	Interest Paid	Interest Finalise...
01/01/2018	Standard	937.50	937.50	125.00	125.00	NIL	NIL	NIL	True
01/04/2018	Standard	1,000.00	1,000.00	156.25	156.25	NIL	NIL	NIL	True
01/07/2018	Standard	1,000.00	1,000.00	156.25	156.25	NIL	NIL	NIL	True
23/08/2018	Owner Invoice	NIL	NIL	100.00	100.00	NIL	NIL	NIL	True
27/08/2018	Owner Invoice	5.50	NIL	NIL	NIL	NIL	NIL	NIL	True
01/10/2018	Standard	1,000.00	NIL	156.25	NIL	NIL	NIL	NIL	False
01/01/2019	Standard	1,000.00	NIL	156.25	NIL	NIL	NIL	NIL	False
01/04/2021	Special	50.00	NIL	NIL	NIL	NIL	NIL	NIL	False
01/05/2021	Special	10,000.00	NIL	NIL	NIL	NIL	NIL	NIL	False

4. The details of the levy show on the screen as below

Levy details

Status: Normal

Date due: 01/10/2018

Levy type: Standard

Levy frequency: Quarterly

Other fund:

Group:

	Debt	Paid	GST debt	GST paid	Interest paid
Admin Fund	1,000.00	NIL	NIL	NIL	NIL
Capital Works Fund	156.25	NIL	NIL	NIL	NIL
Other Fund	NIL	NIL	NIL	NIL	NIL

Description: Quarterly Admin/Capital Works Levy

Opening balance arrears Final interest taken

5. In the description field, edit as required.

Description
Quarterly Admin/Capital Works Levy October to Dec 2018

6. Click the Save button



7. Click Exit to close the screen

