



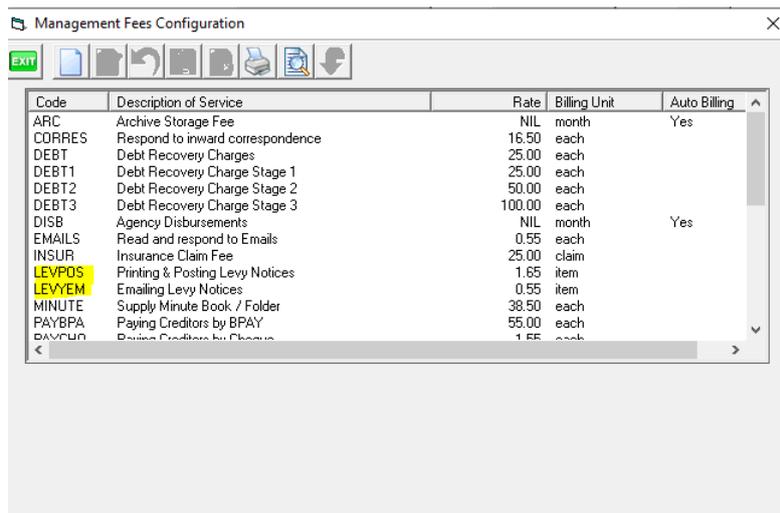
## Charge a Fee When Issuing Levy Statements in Strata Master

This article will assist you to check your Management Fee setting for when issuing Levy Statements to Lot Owners, and the settings will also assist with settings for other items where you may wish to charge the Lot Owner.

The charge is processed when in the Issue Statement screen.

### Configuration in the Management Fees Schedule

1. Navigate to Configure > Management Fees
2. Code LEVPOS and LEVEM should be in place.



Code	Description of Service	Rate	Billing Unit	Auto Billing
ARC	Archive Storage Fee	NIL	month	Yes
CORRES	Respond to inward correspondence	16.50	each	
DEBT	Debt Recovery Charge	25.00	each	
DEBT1	Debt Recovery Charge Stage 1	25.00	each	
DEBT2	Debt Recovery Charge Stage 2	50.00	each	
DEBT3	Debt Recovery Charge Stage 3	100.00	each	
DISB	Agency Disbursements	NIL	month	Yes
EMAILS	Read and respond to Emails	0.55	each	
INSUR	Insurance Claim Fee	25.00	claim	
LEVPOS	Printing & Posting Levy Notices	1.65	item	
LEVYEM	Emailing Levy Notices	0.55	item	
MINUTE	Supply Minute Book / Folder	38.50	each	
PAYBPA	Paying Creditors by BPAY	55.00	each	
PAYCHQ	Paying Creditors by Cheque	1.55	each	

3. If the fees are not added to the Management Fees, you can add them by following this link - <https://kb.rockend.com/help/strata-master-top-tip-23---quantity-management-fees>

### Configuration in the Corp Screen for the Plan

1. Click on the Corp icon and enter the Plan number
2. Check individual Plans by selecting the button with the hand 
3. Ensure that LEVPOS and LEVEM are listed

Code	Description of service	Current rate	New rate	Cost unit	Auto bill	Scheduled	Auto income
ARC	Archive Storage Fee	10.00	10.00	month	Yes	Yes	
CORRES	Respond to inward correspondence	16.50	16.50	each		Yes	
DEBT	Debt Recovery Charge	25.00	25.00	each		Yes	
DEBT1	Debt Recovery Charge Stage 1	25.00	25.00	each		No	
DEBT2	Debt Recovery Charge Stage 2	50.00	50.00	each		No	
DEBT3	Debt Recovery Charge Stage 3	100.00	100.00	each		No	
DISB	Agency Disbursements	NIL	NIL	month	Yes	Yes	
EMAILS	Read and respond to Emails	0.55	0.55	each		Yes	
INSUR	Insurance Claim Fee	25.00	25.00	claim		Yes	
LEVYPOS	Printing & Posting Levy Notices	1.65	1.65	item		Yes	
LEVYEM	Emailing Levy Notices	0.55	0.55	item		Yes	
MINUTE	Supply Minute Book / Folder	38.50	38.50	each		Yes	
PAYBPA	Paying Creditors by BPAY	55.00	55.00	each		Yes	
PAYCHQ	Paying Creditors by Cheque	1.55	1.55	each		Yes	
PAYDE	Paying Creditors by Direct Entry	0.55	0.55	each		Yes	
PHO	Photocopying	0.88	0.88	page		Yes	

4. Highlight the LEVYPOS or LEVYEM to change the amount to be charged if necessary.

## Charging When Processing the Statement/s

1. Select the Levy Wizard icon.



2. Select "Issue Statements"

**Issue individual statements**

Issue statements by individual or multiple plans to owners displaying a balance brought forward, the last 7 levy / invoices due plus any interest due calculated to a selected date.

Notices can be issued using the default Levy Delivery Method, or all notices can be printed.

Save a copy of the notice to file, and when archiving to File Smart publish these notices on the Owner & Committee Portals as desired.

**Issue statements**

3. Tick the 'charge fee for statement(s)' box when issuing statements, select the required Lots, select any other filters and click Finish.

**Levy Notices**

Issue individual statement

One or multiple owners corporations?

Individual owners corporation  
 Multiple owners corporations

Select owners corporation

GST registered owners corporation selected: Active Groups

Enter Plan No. or Street Name or Body Corporate Name:

Strata Plan 2222  
Abbey Road Studios  
23 Fernhill Lane  
LIVERPOOL NSW 2170

Enter other options and details

Calculate interest to:

Save notices to file

**Charge fees for statement(s)**

Additional comment for notices

Delivery Method

Use default method  Print & Email  
Email   
Print all

Select lots to issue individual statements

Unit #	Lot #	Levy Contact	Method
1	1	Mr & Mrs John Larsson & Yoko Ono	Email
2	2	Mr Paul McCartney	Email
3	3	Mr George Harrison	Email
4	4	Mr Ringo Starr	Print

**Finish**

4. If this box "Charge fees for statement" is NOT ticked, the fee will not charge.

## The Fees Charged Show in the Quantity Management Fees

Fees will show immediately in Accounting > Charge Quantity Management Fees > LEVYEM.

In the example below, 2 statements have been sent.



Code	Description of Service	Detail	Rate	Billing Unit	Quantity	Total Charged
POST	Postage		1.10	each	1	\$1.10
LEVPOS	Printing & Posting Levy Notices	November 2021	1.65	item	4	\$6.60
PAYDE	Paying Creditors by Direct Entry		0.55	each	2	\$1.10
PAYDE	Paying Creditors by Direct Entry		0.55	each	2	\$1.10
PAYDE	Paying Creditors by Direct Entry		0.55	each	1	\$0.55
LEVYEM	Emailing Levy Notices	November 2021	0.55	item	2	\$1.10
REC	Receipt of Levy Payments		1.00	receipt	2	\$2.00
REC	Receipt of Levy Payments		1.00	receipt	7	\$7.00
PHO	Photocopying		0.88	page	1	\$0.88

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