



Roll Back A Tax Year End in Strata Master

Why you may need to roll back a tax year end -

- the year is out of step and needs to be rolled back, or
- the reports were run but the printer did not print properly and they need to be reprinted

Where is the Tax Year End for Plans found?

The Tax Year End date is shown in the Corp screen on the Financial tab.

The screenshot shows the 'Strata Plan 3333 - Edit Mode' window. The 'Financial' tab is selected. The 'Tax year end' field is highlighted in yellow and contains the date '30/06/2023'. Other fields include 'Normal levy frequency' (Quarterly), 'Levy discount rate (%)' (0), 'Levy discount grace days' (0), 'Levy interest rate (%)' (10), 'Interest free period' (34 Day), 'Reserve funds' (0.00), 'Reject levy receipts' (unchecked), and 'Charge unpaid interest' (unchecked).

The date showing indicates the current year, and the next date that the reports will be run.

Tax year end 30/06/2023

Can The Plans Be Rolled Back in Bulk ?

The Plans need to be rolled back one by one.

1. Open the Corp screen of the first Plan, then the Financial tab.
2. Click Edit.
3. Click into the date to the right of the year.

Tax year end 30/06/2023

4. Retype the year.

Tax year end 30/06/2022

5 Click Save.

6. Then continue with the other Plans.

Useful Links

<https://kb.rockend.com/help/strata-master-top-tip-123-tax-report>

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