

Release Notes – Version 5.5.99

StrataMax has been dedicated to meeting the needs of Strata Managers for over 20 years through the continual enhancement of our software suite. We are committed to providing new functionality to support you in servicing your clients and to provide opportunities for you to optimize efficiency within your office environment.

This document describes exciting new features and enhancements available in the above release.

A history of Release Notes can be reviewed on the [StrataMax Online Help](#)



THE COMPLETE STRATA MANAGEMENT SOLUTION



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1. Resubdivision/Reallocation of Entitlements Overview

A new Resubdivision/Reallocation of Entitlements module has been added to BCMax to simplify the process of Resubdivision and amending existing lot entitlements. This new process provides step-by-step setup screens for entry of data and reporting to confirm the validity of input prior to processing.

Enhancements now allow users to:

1. Add new lots – without affecting entitlements to existing lots. Information can be populated from the roll of an existing lot for the new lots, allowing time efficient, accurate and streamlined set up procedures.
2. Elimination of levy reversals – The Plan/Resubdivision date cannot be future dated. This new process eliminates the need to reverse or delete levies not yet generated in the system. Only levies in the current levy period spanning the planned Resubdivision date will be affected, and adjustments are shown as a pro-rata amount on the Ledger Card once the process has been finalised. For the future (ungenerated) levies the charge schedules will be updated.
3. Reporting – The new feature allows you to print a report and check all details before processing, with provision to go back to the previous screen and make any amendments or deletions. Once each screen has been completed, the 'Next' button is selected to progress.
4. Automation – the system will now automate the changes to the Resubdivision Lot, including change of name on the roll, amended levy information, and the transfer of a remaining balance as per your selection, thus resetting the account balance back to zero.
5. Confirmation – at every step of the process the user can confirm that the information is as they intended the outcome to be, reports can be printed for checking the setup, plus the ability to go back to previous screens during the process to make changes if required.

2. Plan/Resubdivision options

There are three different options in the main menu of Resubdivision / Reallocation of Entitlements that can be selected depending on the nature of the Resubdivision / Reallocation:

- Resubdivide to add new lots (*subdivide a lot into multiple lots*)
- Change existing Lot entitlements (*change, reallocation & amalgamation of current lots*)
- Add new Lots (*without affecting entitlements of existing lots*)

Resubdivision / Reallocation of Entitlements 212 ON MARGARET 33840

Plan/Resubdivision Date: 31/03/2020

NOTE: This process will handle adjustments to levies. You do not need to reverse or delete any future levies. No changes are made until the final step, and it is validated and processed as a single step.

Resubdivide to add new lots
Subdivide a lot into multiple new lots
 Lot For Resubdivision

Change existing lot entitlements
Change entitlements of existing lots, reallocations and amalgamation.

Add new lots
Add new lots without affecting entitlements of existing lots

Please select the lot to be resubdivided

Next

3. Option 1 – Resubdivide to add new lots:

This option is used to subdivide a lot into multiple new lots.

Once 'Resubdivide to add new lots' (Option 1) is selected from the Main Menu along with the lot for Resubdivision, select 'Next' to continue to set up the plan, enter the Owner details and adjust the levies.

3.1 Plan Setup

After the lot for Resubdivision is selected in the 'Plan Setup Menu' this will create new lots and unit number in the main StrataMax Roll, including contribution and interest entitlements and car space numbers (if required).

The plan setup requires the number of new lots to be entered. Once the new number of lots are entered the total number of lots in the scheme will be automatically added.

The basic information such as Starting Account Code (which determines the numerical sequence in the table), Lot and Unit numbers as well as the most frequent entitlement values need to be entered in the Auto Fill section.

Please Note: If the starting account number is to be different this can be changed, as well as Lot number and Unit Number and this will then update the table. Account numbers in the table can also be changed to match the Lot number.

Often a new balance lot will have a lot number such as Lot 101 etc, and it's important to change the account number to have the same suffix (i.e. 02100101) This is important as this is the only stage where the account numbers can be edited.

To edit an Account Code to match the Lot number:

1. Double click in the Account Code field and input required number
2. Repeat for Lot Number.
3. If the entitlements are different to the auto fill, edit where required.
4. Press enter to move to the next field down.
5. Details entered in the Plan Setup will effect the changes in the Roll when processed.
6. Click Next screen when completed.

Current	New	Total	Plan Number
6	6	12	12345
600	0	600	<input type="checkbox"/> No Intro Letters For StrataMax
600	0	600	

Auto Fill

Starting Account Code: 02100007 Lot: 7 Unit: 7 Contribution Entitlements: 100 Interest Entitlements: 100

Account Code	Lot Number	Unit Number	Contribution Entitlements	Interest Entitlements	Car Space Number
02100007	00007	7	100	100	
02100008	00008	8	100	100	
02100009	00009	9	100	100	
02100010	00010	10	100	100	
02100011	00011	11	100	100	
02100012	00012	12	100	100	

Please Note: Information from this screen is made available in Merge letters and included in Welcome packs and StrataMax Intro Letters. There is also a tick box option if you do not wish the information to be used for StrataMax letters in Merge Letters.

Plan Set Up to Add an Account Code out of current Sequence:

In the example below the Resubdivision of Lot 100 into Lots 15–20 plus a new Balance Lot 101. The New Number of Lots is 7. The Starting Account code is 02100015, Lot and Unit are 15, and the most common entitlement value is 10. Note the account code, Lot number and entitlement for the new Balance Lot 101 required editing.

	Current	New	Resub	Total	
Number Of Lots	15	7		22	Plan Number 190620
Contribution Entitlements	240	100	-100	240	<input checked="" type="checkbox"/> No Intro Letters For StrataMax
Interest Entitlements	240	100	-100	240	

Auto Fill
 Starting Account Code: 02100015 Lot: 15 Unit: 15 Contribution Entitlements: 10 Interest Entitlements: 10

Account Code	Lot Number	Unit Number	Contribution Entitlements	Interest Entitlements	Car Space Number
02100015	00015	15	10	10	
02100016	00016	16	10	10	
02100017	00017	17	10	10	
02100018	00018	18	10	10	
02100019	00019	19	10	10	
02100020	00020	20	10	10	
02100101	00101	101	40	40	

In States where Lots have a single entitlement, the Plan Setup will show a single column for entitlements.

3.2 Owner Details

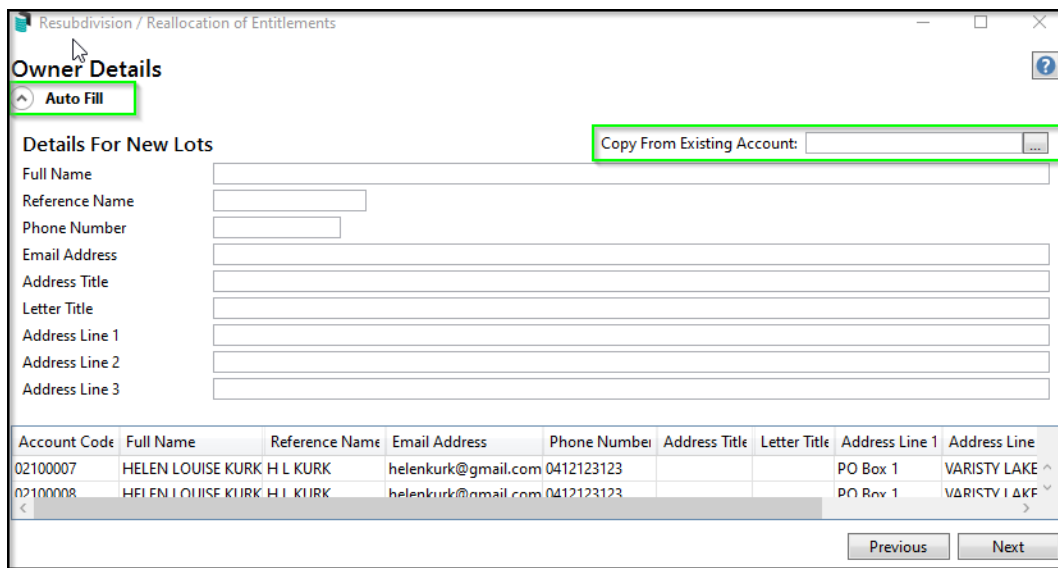
This screen has two options to insert new Owners information:

- Auto-Fill from another existing lot from the roll - This is handy when you wish to simply duplicate the Developer's details for the Resubdivision of all new lots. The details will default to the Resubdivided Lot unless another lot is selected to emulate.
- Manually entering each lot – double click on each line item and enter details

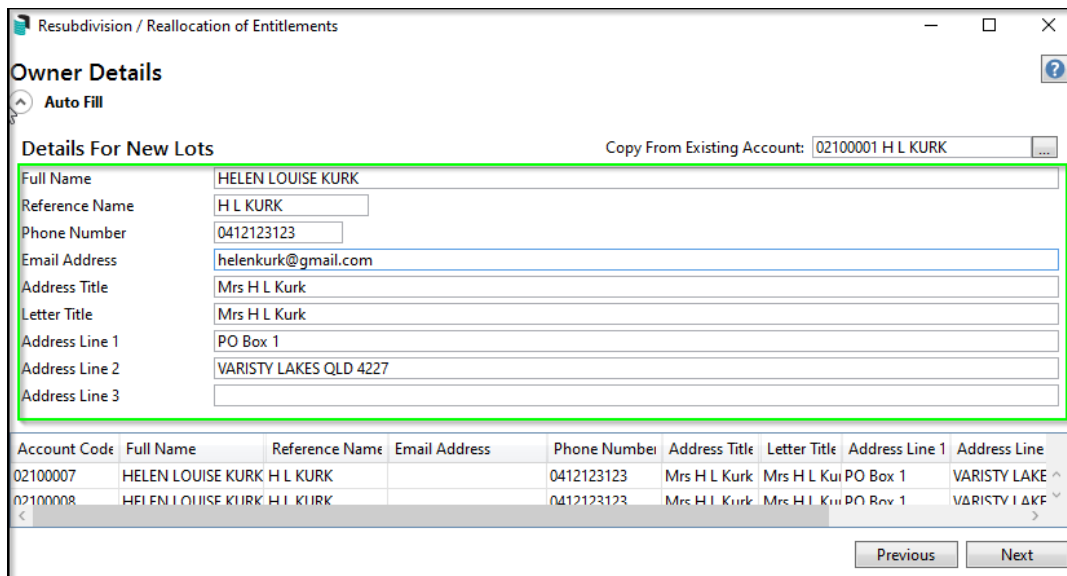
3.2.1 Auto Fill

By selecting the 'Auto Fill' arrow, a drop down box appears with option to 'Copy from existing Account' this will populate information from the roll into the new subdivided lots.

Owners' Details Screen when *Auto Fill* Selected:



Owner’s Details Screen – *Auto Fill* when lot is selected to copy from



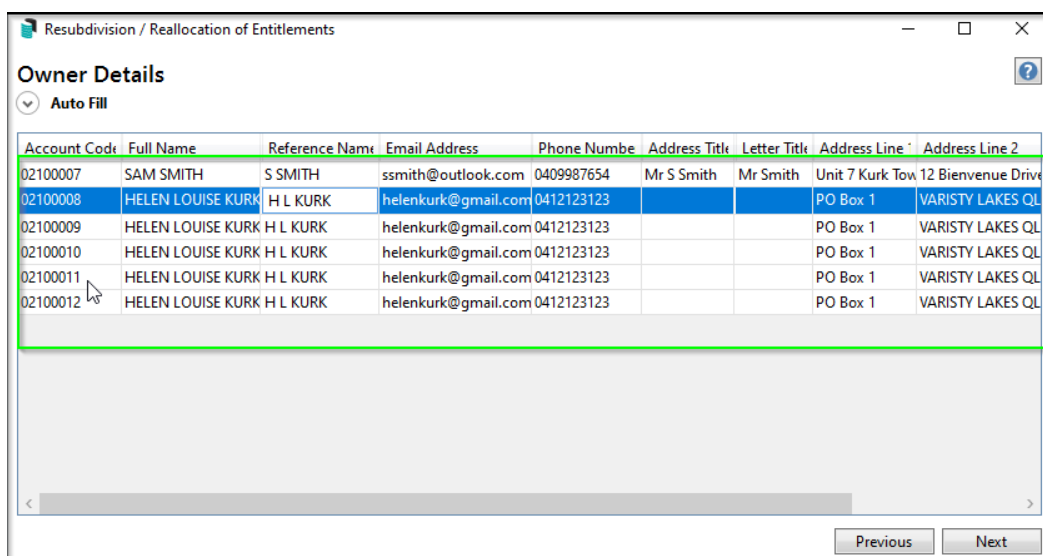
Complete any blank spaces in fields once auto-fill has transferred current information from roll.

3.2.2 Manual Input (Resubdivided Lot Owner Details)

The other option is to type in all the new subdivided lot owners’ details manually. Details from the initial existing lot selected to be Resubdivided (from main menu) populates into all of the new subdivided lots automatically unless another Lot is selected for emulation. To change all the lot details simply double click into any field to edit Owner/information.

In the example below, Lot 7 has new details entered manually. The remainder of lots are copied from Lot 6 (original subdivided lot) and are still awaiting changes.

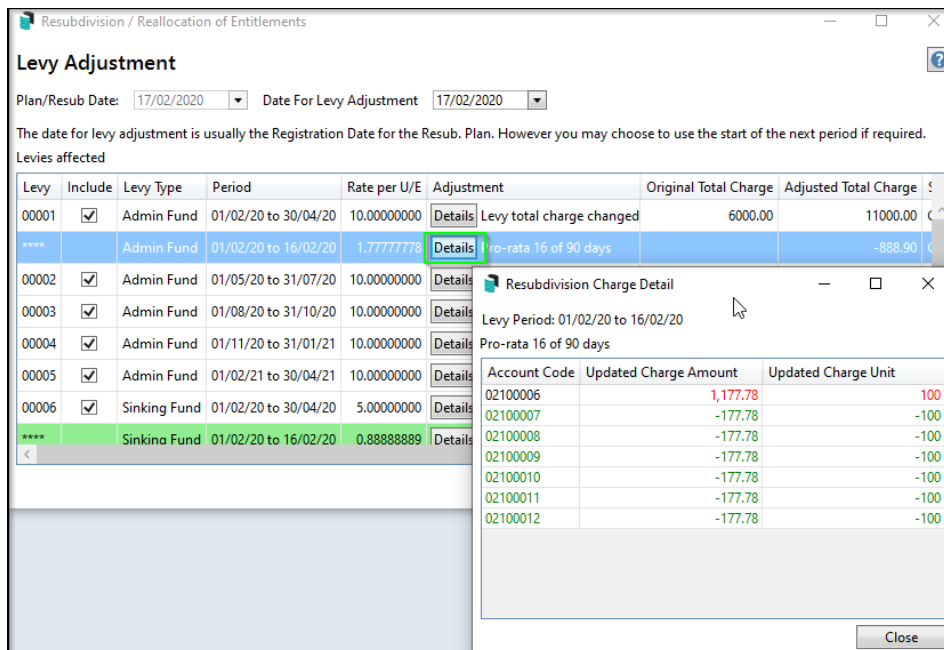
Owner’s Details Screen – Manually Entered details for Lot 7:



3.3 Levy Adjustment

For the resubdivided lots, levies are automatically calculated by the system based on the date of Resubdivision entered at the start of the process. Alternatively, a future date can be entered into 'Date for Levy Adjustment' if the recalculation of levies is to be actioned from the start of a future levy period. Each levy period is listed and can be included (or un-tick if not required), with the levy period affected by the Resubdivision date highlighted in green below. The system automatically calculates the amount of pro rata days @ rate per unit entitlement for this period. Click the 'Details' icon in the Adjustment table to display a pop-up box with the breakdown of this calculation being itemised. Once processed (very last page of process) these details will appear on the ledger card for each lot.

Sample Levy Adjustment Screen – with Details selected for 01/02/2020 to 16/02/2020 Pro Rata details breakdown



Users have the option to set the start of the next period if required by unticking the current levy period box in column 'Include.'

The schedule for Future Levies (not yet generated) will be updated to the new entitlements and the new lots will be added if ticked.

If there are 'Custom levies', they will show in the Levy Adjustment Screen as two period rates like the Administrative and Sinking Fund. 'Details' gives the breakdown of each levy charge changed and Pro Rata amount for adjustment which will be processed to account once Resubdivision is finalised. If new lots are required to be included in the Custom Levy, select the 'Details' on the Original Custom Levy and the schedule

for the new Lots will open, enabling the charge units to be set. If any of the new Lots are to be excluded from the Custom Levy, enter the charge rate as 0.

Custom levy “Insurance” in Levy Adjustment Screen

Levy	Include	Levy Type	Period	Rate per U/E	Adjustment	Original Total Charge	Ac
00008	<input checked="" type="checkbox"/>	Sinking Fund	01/10/20 to 31/12/20	1.00000000	Details	600.00	
00009	<input checked="" type="checkbox"/>	Sinking Fund	01/01/21 to 31/03/21	1.00000000	Details	600.00	
00012	<input checked="" type="checkbox"/>	Insurances	01/04/20 to 30/06/20	0.50000000	Details Levy total charge changed	300.00	
****	<input checked="" type="checkbox"/>	Insurances	01/04/20 to 30/04/20	0.16483516	Details Pro-rata 30 of 91 days		
00013	<input checked="" type="checkbox"/>	Insurances	01/07/20 to 30/09/20	0.50000000	Details	300.00	
00014	<input checked="" type="checkbox"/>	Insurances	01/10/20 to 31/12/20	0.50000000	Details	300.00	
00015	<input checked="" type="checkbox"/>	Insurances	01/01/21 to 31/03/21	0.50000000	Details	300.00	

Custom Levy “Details” for editing:

Resubdivision Charge Detail

Show Changes Only

Levy Period: 01/05/20 to 31/07/20

Levy total charge changed

Set All Custom Charge Units:

Account Code	Custom Charge Unit	Existing Charge Amount	Updated Charge Amount	Existing Charge Unit	Updated Charge Unit
02100015	<input type="text" value="1"/>		65.00		1
02100016	<input type="text" value="1"/>		65.00		1
02100017	<input type="text" value="1"/>		65.00		1
02100018	<input type="text" value="1"/>		65.00		1
02100019	<input type="text" value="1"/>		65.00		1
02100020	<input type="text" value="1"/>		65.00		1
02100100	<input type="text" value="100"/>	6,500.00	0.00	100	0
02100101	<input type="text" value="0"/>		0.00		0

[Close](#)

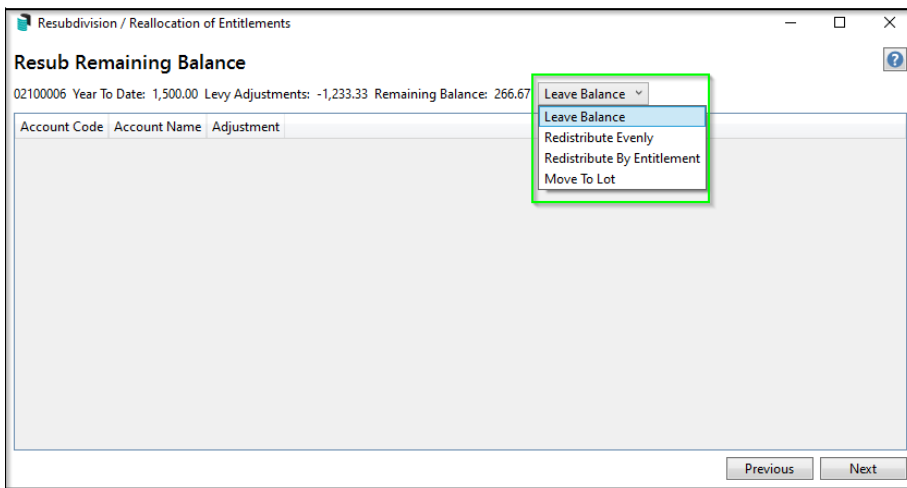
3.4 Resub remaining Balance

There are now four different options to allocate the remaining balance on the resubdivided lot:

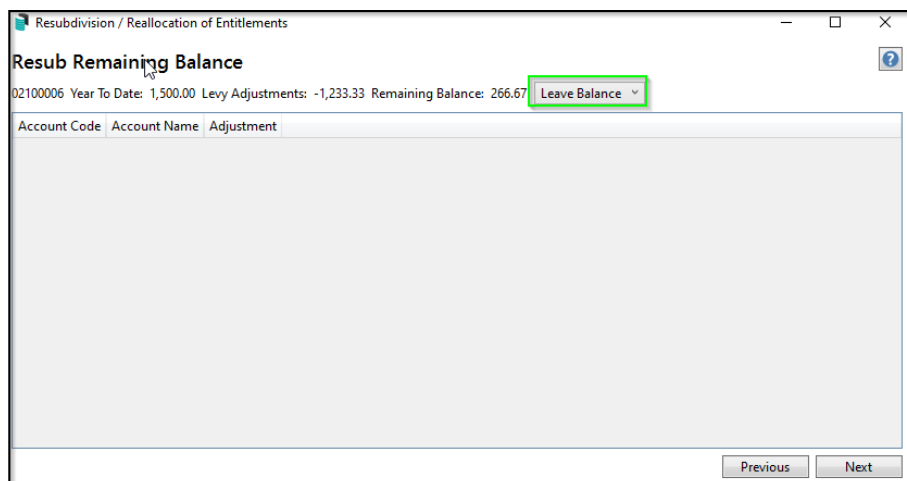
1. Leave Balance (no change to levy)
2. Redistribute Evenly (amount of entitlements for subdivision are divided equally)
3. Redistribute by Entitlement (based on unit entitlement of new lots)
4. Move to Lot (monies are transferred to a designated lot)

Depending on which option is selected, details will appear in this menu accordingly.

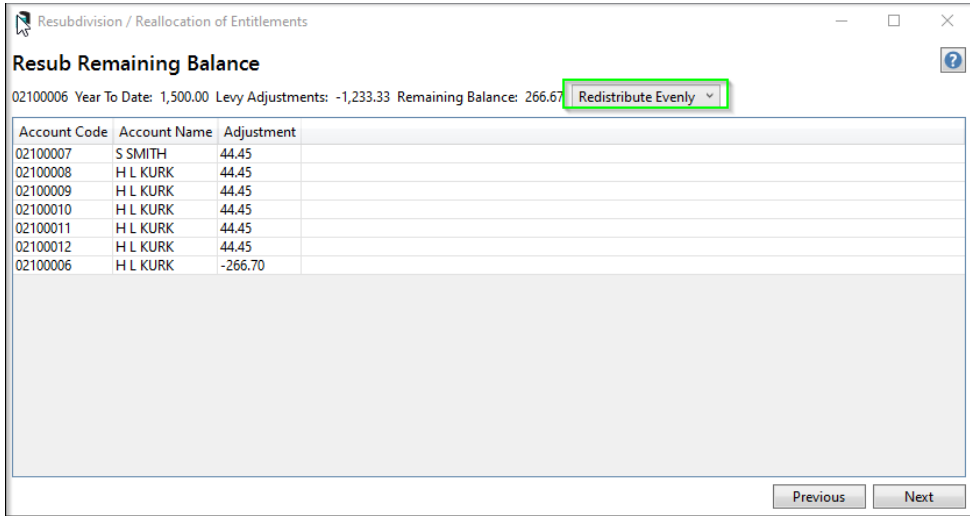
Resub Remaining Balance Screen showing all Options available for Selection:



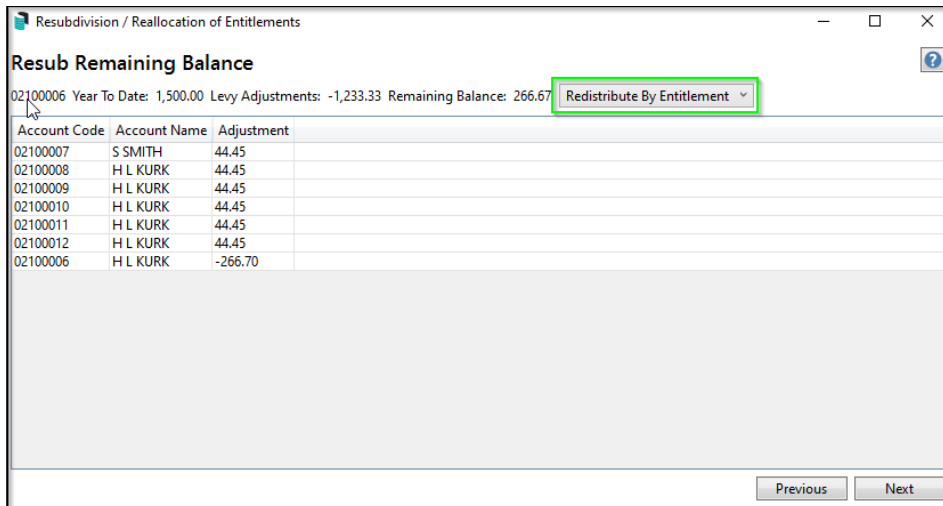
Resub Remaining Balance Screen with Leave balance option selected:



Resub Remaining Balance Screen with Redistribute Evenly option selected:



Resub Remaining Balance Screen with Redistribute by Entitlement option selected:



Resub Remaining Balance Screen with Move to Lot “7” selected:

Account Code	Account Name	Adjustment
02100007	S SMITH	266.67
02100006	H L KURK	-266.67

Custom Levies, when adding new Lots in a Subdivision, Resub Balance Remaining Options are available for Custom levies and are Redistribute Evenly, Redistribute by Entitlement and Move Balance to Another Lot. All processes are the same as above for processing of Resubdivision for custom levies which just show the adjustment for the original lot and in the case of Move To, new amounts adjusted on that particular lot. If any new subdivided lots need to have a custom levy set up for the future, proceed to do so in Levy Management as per Stratamax Instructions.

3.5 Finalise

The final screen in the process is 'Finalise' which lists all the proposed changes for each Lot based on information inputted at each menu stage. This can still be edited if required by selecting the 'previous' button which takes you back to the previous menu:

- Lot Changes (roll/entitlement edits)
- Levy Adjustments (Regular levy periods)
- Levy Pro-Rata Adjustments (pro-rata calculations allowing for Resubdivision date made by the system)

It is recommended to select 'Print Report' and check all the details entered are correct. Three pages will appear:

- New Owners' Details for the Roll.
- All adjustments to the levy period for the Resubdivided Lot,
- Pro- rata adjustments for the new Lots.

There is a checkbox box here to perform data storage before processing Resubdivision.

Finalise Screen – with all proposed changes to Roll/Levy prior to processing:

Finalise

Lot Changes:

Lot Account	Lot No.	Unit No.	Car Space No.	Car Space No.	Contribution Entitlements	Interest Entitlements	Adjustment
02100007	00007	7		SAM SMITH	100	100	44.45
02100008	00008	8		TRUDIE LANE	100	100	44.45
02100009	00009	9		BRIAN KENT & SUSAN KENT	100	100	44.45

Levy Adjustments:

Lot Account	Levy Type	Levy Period	Charge Units	Adjustment Amount	Original Charge Units	Original Amount
02100006	Admin Fund	01/02/20 to 30/04/20	0	-1,000.00	100	1,000.00
02100006	Admin Fund	01/05/20 to 31/07/20	0	0.00	100	1,000.00
02100006	Admin Fund	01/08/20 to 31/10/20	0	0.00	100	1,000.00

Levy Pro-Rata Adjustments:

Lot Account	Levy Type	Levy Period	Charge Units	Adjustment Amount	Based Off Levy Period
02100006	Admin Fund	01/02/20 to 16/02/20	100	177.78	01/02/20 to 30/04/20
02100006	Sinking Fund	01/02/20 to 16/02/20	100	88.89	01/02/20 to 30/04/20
02100007	Sinking Fund	01/02/20 to 16/02/20	-100	-88.89	01/02/20 to 30/04/20

Buttons: Print Report, Process Resubdivide Lot, Data Storage Before Process, Previous, Close

Example of Resubdivision Report – using Resub Remaining Balance Option of Redistribute Evenly (Page 1) showing Lot Changes:

Resubdivision Setup
STANDARD FORMAT PLAN NO. 12345

New Lots:

Code	Name	Lot	Unit	Car #	U/E	Int / E	Email	Phone	Address
02100007	SAM SMITH	00007	7	100	100		samsh@outlook.com	0409987654	Unit 7 Kurk Towers 12 Blenheim Drive CURRUMBIN WATERS QLD 4223
02100008	TRUDIE LANE	00008	8	100	100		tlane@gmail.com	0403456123	1/2 Sunny Street PALM BEACH QLD 4221
02100009	BRIAN KENT &	00009	9	100	100		bakent@gmail.com	0415321654	125 Jewell Parade MIAMI QLD 4220
02100010	RODNEY &	00010	10	100	100		rodney@gmail.com	0410123456	Unit 2/34 Seagull Avenue MERMAID BEACH QLD 4217
02100011	MICHAEL	00011	11	100	100		mikeb@outlook.com	0412654321	Unit 11 Kurk Towers 12 Blenheim Drive CURRUMBIN WATERS QLD 4223
02100012	THOMAS &	00012	12	100	100		tomasm@gmail.com	0403987654	PO Box 45 BURLEIGH HEADS DC QLD 4220
02100005									

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Example of Resubdivision Report - using Resub Remaining Balance Option of Redistribute Evenly (Page 2) showing Levy Changes:

Resubdivision Setup STANDARD FORMAT PLAN NO. 12345						
Levy Changes:						
Code	Levy	Period	Unit	Amount	Original unit	Original Amount
02100000	00001	01/02/20 to 30/04/20	0.00	-1,000.00	100.00	1,000.00
02100000	00002	01/05/20 to 31/07/20	0.00	0.00	100.00	1,000.00
02100000	00003	01/08/20 to 31/10/20	0.00	0.00	100.00	1,000.00
02100000	00004	01/11/20 to 31/01/21	0.00	0.00	100.00	1,000.00
02100000	00005	01/02/21 to 30/04/21	0.00	0.00	100.00	1,000.00
02100000	00006	01/02/20 to 30/04/20	0.00	-500.00	100.00	500.00
02100000	00007	01/05/20 to 31/07/20	0.00	0.00	100.00	500.00
02100000	00008	01/08/20 to 31/10/20	0.00	0.00	100.00	500.00
02100000	00009	01/11/20 to 31/01/21	0.00	0.00	100.00	500.00
02100000	00010	01/02/21 to 30/04/21	0.00	0.00	100.00	500.00

Once the Resubdivision process has been completed the roll will be updated. Stratamax login and password letters are available to print with information available in Merge Letters along with the Welcome letter. Ledger cards are updated with the levy information showing the pro rata breakdown of the levy period affected according to date inserted for resubdivision. Levy Notices can be printed for the new Lots.

Example of a Roll following a Resubdivision:

Code ^	Name	Lot	Unit	Plan	YTD Balance
02100001	HELEN LOUISE KURK	00001	1	12345	1,500.00
02100002	HELEN LOUISE KURK	00002	2	12345	1,500.00
02100003	HELEN LOUISE KURK	00003	3	12345	1,500.00
02100004	HELEN LOUISE KURK	00004	4	12345	1,500.00
02100005	HELEN LOUISE KURK	00005	5	12345	1,500.00
02100006	RESUBDIVIDED	00006	6	12345	-0.03
02100007	SAM SMITH	00007	7	12345	1,277.78
02100008	TRUDIE LANE	00008	8	12345	1,277.78
02100009	BRIAN KENT & SUSAN KENT	00009	9	12345	1,277.78
02100010	RODNEY & TAMARA BARRETT	00010	10	12345	1,277.78
02100011	MICHAEL BROWN	00011	11	12345	1,277.78
02100012	THOMAS & MARY GOLDEN	00012	12	12345	1,277.78

Count: 12 OK Cancel

Please Note:

- Original lots of building (1-5) remain unchanged.
- Lot 6 (Resubdivided Lot) is now noted as “Resubdivided”
- New lots 7-12 show the levy amounts for pro rata levies and including any balance transferred from Lot 6.

New Lot Ledger Card (Example) post Resubdivision with “Redistribute Evenly” option in resub Remaining balance screen.

Date	Type	Details	Reference	Debit	Credit	Balance
17/02/20	Admin Fund	Brought forward	I0000013			0.00
17/02/20	Admin Fund	01/02/20 To 30/04/20	I0000020	1,000.00		1,000.00
17/02/20	Admin Fund	Pro Rata 18 Days	I0000027		177.78	822.22
17/02/20	Sinking Fund	01/02/20 To 30/04/20	I0000027	500.00		1,322.22
17/02/20	Sinking Fund	Pro Rata 18 Days	I0000034		88.89	1,233.33
29/02/20	Admin Fund Jnl	Trf From 02100006	J0000019	29.83		1,262.98
29/02/20	Sinking Fund Jnl	Trf From 02100006	J0000020	14.82		1,277.78
				\$1,544.45	\$266.67	\$1,277.78
				BALANCE DUE:		\$1,277.78
Over 90 Days	90 Days	60 Days	30 Days	Current	Date Paid	Amount Paid
				1,277.78		

Please Note: the Administrative and Sinking Fund pro rata amounts are listed separately as well as the transferred balances from Lot 6.

4. Option 2 – Change Existing Lot Entitlements

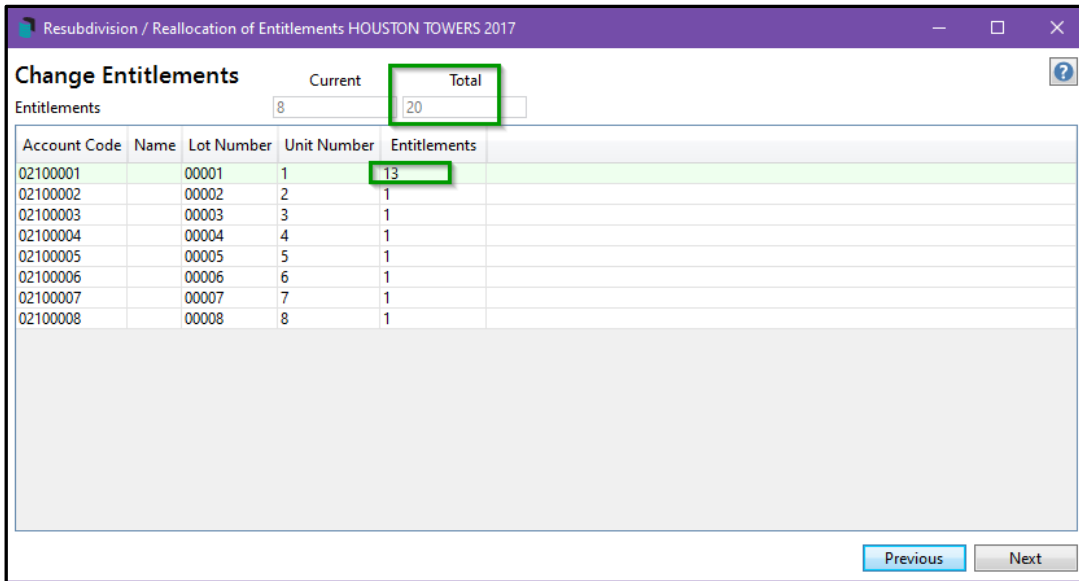
This option is used to change entitlements of existing lots, reallocations and amalgamations. When changes are made the totals for either Contribution or Interest will be updated automatically.

4.1 Changing Entitlements

Follow the below steps to change existing lot contribution or interest entitlements:

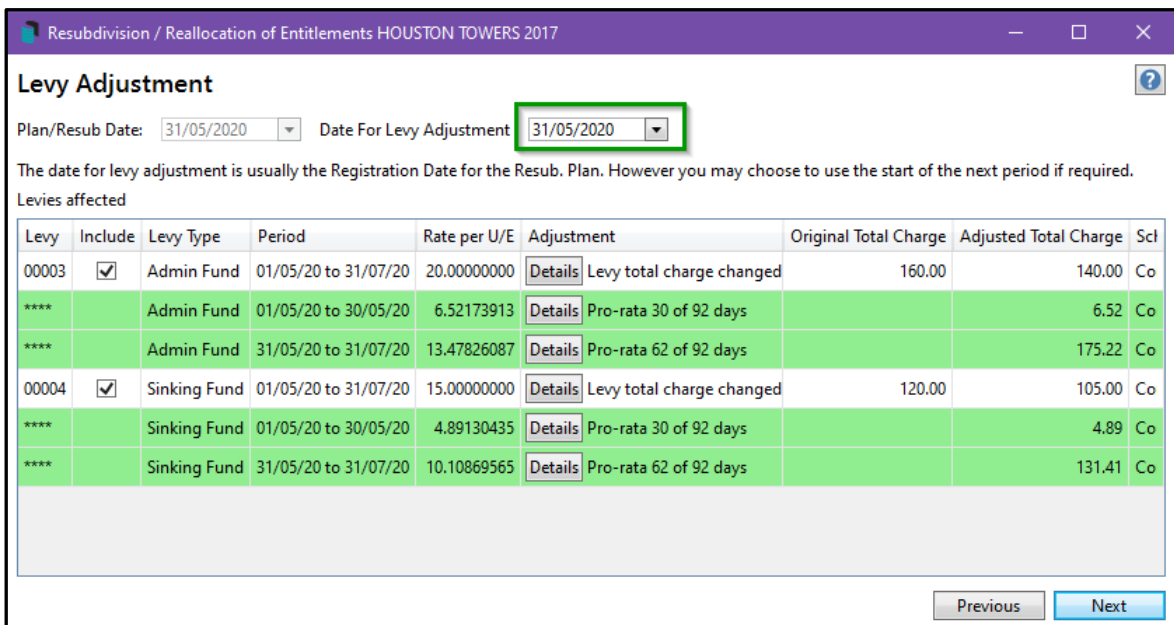
1. Select the second option from the first screen 'Change existing lot entitlements'
2. Click on 'Next'
3. Reallocation of Entitlement screen will appear where changes can be manually entered
4. Double click on the areas that require manual changes
5. Enter changes to the entitlements (in the example below Lot 1 is amended)

Note: Totals will also be adjusted accordingly.



4.2 Levy Adjustment

After making the changes to the Entitlements and clicking next the 'Levy Adjustment' screen will appear. This will report the automatic system calculations of the rate and adjustment for each of the Lots affected, based on the 'Plan/ Resubdivision Date' entered in main screen.



4.3 Finalise Reallocation of Entitlements

The final screen in the process is 'Finalise' which lists all the proposed changes for each Lot based on information inputted at each menu stage. This can still be edited if required by selecting the 'previous' button which takes you back to the previous menu:

- Lot Changes (roll/entitlement edits)
- Levy Adjustments (Regular levy periods)
- Levy Pro-Rata Adjustments

Finalise

Lot Changes:

Lot Account	Lot No.	Unit No.	Car Space No.	Owner Name	Entitlements	Adjustment
02100001					13	0.00

Levy Adjustments:

Lot Account	Levy Type	Levy Period	Charge Units	Adjustment Amount	Original Charge Units	Original Amount
02100001	Admin Fund	01/05/20 to 31/07/20	0	-20.00	1	20.00
02100001	Sinking Fund	01/05/20 to 31/07/20	0	-15.00	1	15.00

Levy Pro-Rata Adjustments:

Lot Account	Levy Type	Levy Period	Charge Units	Adjustment Amount	Based Off Levy Period
02100001	Admin Fund	01/05/20 to 30/05/20	1	6.52	01/05/20 to 31/07/20
02100001	Sinking Fund	31/05/20 to 31/07/20	13	131.41	01/05/20 to 31/07/20
02100001	Admin Fund	31/05/20 to 31/07/20	13	175.22	01/05/20 to 31/07/20

Data Storage Before Process

It is recommended to select 'Print Report' and check all the details entered are correct. Report will include:

- Resubdivision Setup
- Levy Changes

Finalise Screen – “Report” After Change Existing Lot Entitlements entered:
Page 1 “New Lots”

Resubdivision Setup
BUILDING UNITS PLAN NO. 66535874

New Lots:

Code	Name	Lot	Unit	Car #	U/E	Int / E	Email	Phone	Address
02100001			13		0				
Totals:			13		0				

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Page 2 Report - Levy Changes

Resubdivision Setup
BUILDING UNITS PLAN NO. 66535874

Levy Changes:

Code	Levy	Period	Unit	Amount	Original unit	Original Amount
02100001	00003	01/05/20 to 31/07/20	0	-20.00	1.00	20.00
02100001	00004	01/05/20 to 31/07/20	0	-15.00	1.00	15.00
Totals:			0	-35.00	2	35.00

Page 3 Report – Levy Pro-rata Adjustments

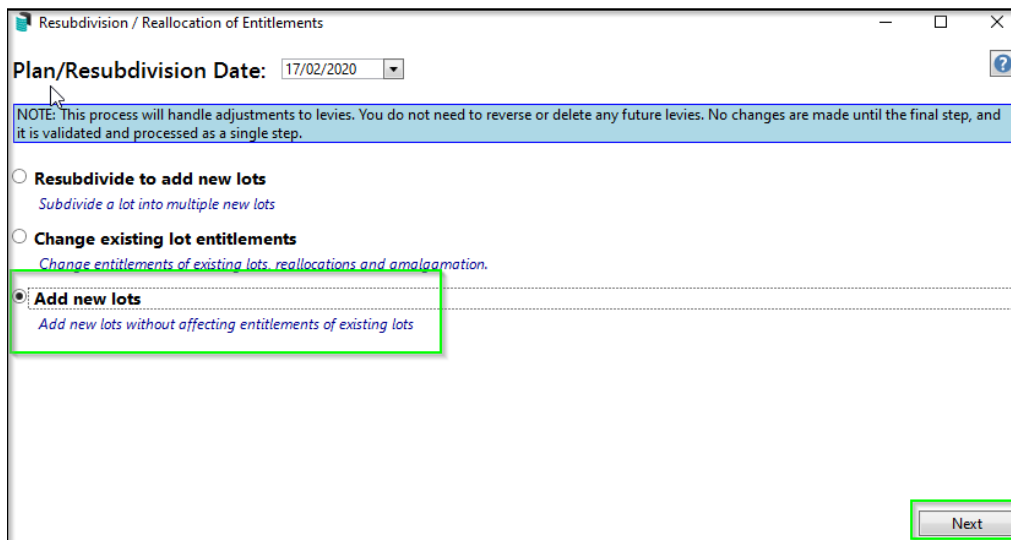
Resubdivision Setup
BUILDING UNITS PLAN NO. 66535874

Levy Pro-rata Adjustments:

Code	Levy	Pro-rata Period	Unit	Amount	Pro-rata From Period
02100001	00003	01/05/20 to 30/05/20	1	6.52	01/05/20 to 31/07/20
02100001	00004	31/05/20 to 31/07/20	13	131.41	01/05/20 to 31/07/20
02100001	00003	31/05/20 to 31/07/20	13	175.22	01/05/20 to 31/07/20
02100001	00004	01/05/20 to 30/05/20	1	4.89	01/05/20 to 31/07/20
Totals:			28	318.04	

5. Option 3 – Add New Lots

The final option available is ‘Add new lots. This is used when new lots need to be added without affecting entitlements of existing lots.



5.1 Plan Setup

This is the same as before, requiring number of lots to be entered (outlined with a red box), with 'Total' number of lots adjusting automatically. Enter the Starting Account code Lot and Unit number to match the first new Lot number. Ensure the account code number correlates with the Lot Number.

Contribution and Interest entitlements are automatically entered based on the Auto Fill setup, but can be edited if required. The information box at bottom of screen provides prompts as to what information is required to proceed.

Please Note: for Custom Levies , the custom levy entitlements (charge Unit) must be entered manually (if required) by selecting Details in the Levy Screen:

Plan Setup Menu - after new lot number is added

Plan Setup

	Current	New	Total	
Number Of Lots	8	4	12	Plan Number: 66535874
Entitlements	8	4	12	<input type="checkbox"/> No Intro Letters For StrataMax

Auto Fill
Starting Account Code: 02100009 Lot: 0 Unit: 0 Entitlements: 1

Account Code	Lot Number	Unit Number	Entitlements	Car Space Number
02100009			1	
02100010			1	
02100011			1	
02100012			1	

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5.2 Owner Details

This screen has two options to insert new Owners information:

- Auto-Fill from another existing lot from the roll – This is handy when you wish to simply duplicate the Developer's details for the Resubdivision of all new lots. The details will default to the Resubdivided Lot, unless another lot is selected to emulate.
- Manually entering each lot – double click on each line item and enter details

5.2.1 Auto Fill

By selecting the 'Auto Fill' arrow, a drop down box appears with option to 'Copy from existing Account'. This will populate information from the roll into the new subdivided lots.

Resubdivision / Reallocation of Entitlements

Owner Details

Auto Fill

Copy From Existing Account: 02100001 H L KURK

Details For New Lots

Full Name: HELEN LOUISE KURK
 Reference Name: H L KURK
 Phone Number: 0412345678
 Email Address: helenkurk@gmail.com
 Address Title: Mrs H L Kurk
 Letter Title: Mrs H L Kurk
 Address Line 1: PO Box 1
 Address Line 2: VARISTY LAKES QLD 4227
 Address Line 3:

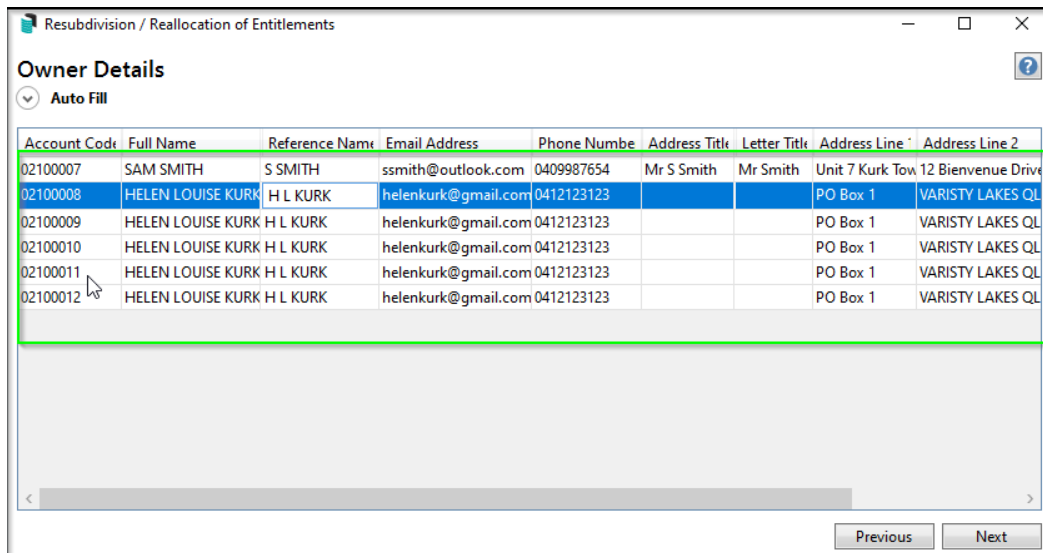
Account Code	Full Name	Reference Name	Email Address	Phone Number	Address Title	Letter Title	Address Line 1	Address Line 2	Address Line 3
02100007	HELEN LOU H L KURK			0412345678	Mrs H L Kurk	Mrs H L Kurk	PO Box 1	VARISTY LAKES	
02100008	HELEN LOU H L KURK			0412345678	Mrs H L Kurk	Mrs H L Kurk	PO Box 1	VARISTY LAKES	

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5.2.2 Manual Input (Resubdivided Lot Owner Details)

The other option is to type in all the new subdivided lot owners' details manually. Details from the initial existing lot selected to be Resubdivided (from main menu) populates into all of the new subdivided lots automatically unless another Lot is selected for emulation. To change all the lot details simply double click into any field to edit Owner/information.

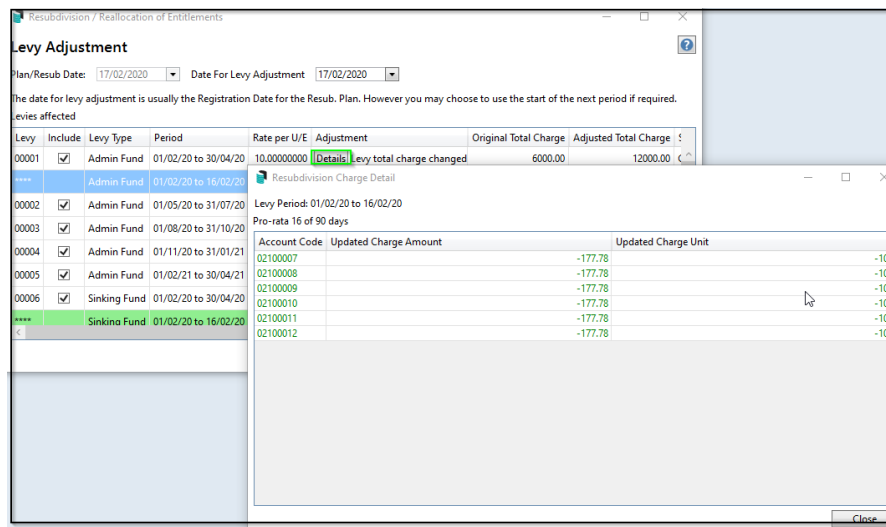
In the example below, Lot 7 has new details entered manually. The remainder of lots are copied from Lot 6 (original subdivided lot) and are still awaiting changes.



5.3 Levy Adjustment

Levies are automatically calculated by the system, each levy period is listed and can be included (or un-tick if not required), with the levy period affected by the Resubdivision date highlighted in green. The system automatically calculates the amount of pro rata days @ rate per unit entitlement for the adjusted period.

By selecting the 'Details' icon in the Adjustment column the breakdown of this calculation is itemised for you. Once processed (on Finalise Screen) these details will appear on the ledger card for each lot providing breakdown of information.



5.4 Finalise

The very last page reports the proposed changes, into three sections:

- Lot Changes (roll/entitlement edits)

- Levy Adjustments (Regular levy periods)
- Levy Pro-Rata Adjustments (automatic pro-rata calculations based on the Date for Levy Adjustment)

At this point, 'Print Report' can be selected to review the details entered. If necessary, any changes can then be made. Two Pages will be generated for the report:

Report Page 1 - New Lots:

Resubdivision Setup STANDARD FORMAT PLAN NO. 12345							
New Lots:							
Code	Name	Lot	Unit	Car #	U/E	Int / E Email	Phone Address
02100007	HELEN LOUISE	00007	7	100	100	helenkurk@gmail.com	0412345678 PO Box 1 VARISTY LAKES QLD 4227
02100008	HELEN LOUISE	00008	8	100	100	helenkurk@gmail.com	0412345678 PO Box 1 VARISTY LAKES QLD 4227
02100009	HELEN LOUISE	00009	9	100	100	helenkurk@gmail.com	0412345678 PO Box 1 VARISTY LAKES QLD 4227
02100010	HELEN LOUISE	00010	10	100	100	helenkurk@gmail.com	0412345678 PO Box 1 VARISTY LAKES QLD 4227
02100011	HELEN LOUISE	00011	11	100	100	helenkurk@gmail.com	0412345678 PO Box 1 VARISTY LAKES QLD 4227
02100012	HELEN LOUISE	00012	12	100	100	helenkurk@gmail.com	0412345678 PO Box 1 VARISTY LAKES QLD 4227

Report Page 2 - Levy Pro-rata Adjustments :

Resubdivision Setup STANDARD FORMAT PLAN NO. 12345						
Levy Pro-rata Adjustments:						
Code	Levy	Pro-rata Period	Unit	Amount	Pro-rata From Period	
02100007	00001	01/02/20 to 16/02/20	-100.00	-177.78	01/02/20 to 30/04/20	
02100007	00006	01/02/20 to 16/02/20	-100.00	-88.89	01/02/20 to 30/04/20	
02100008	00006	01/02/20 to 16/02/20	-100.00	-88.89	01/02/20 to 30/04/20	
02100008	00001	01/02/20 to 16/02/20	-100.00	-177.78	01/02/20 to 30/04/20	
02100009	00001	01/02/20 to 16/02/20	-100.00	-177.78	01/02/20 to 30/04/20	
02100009	00006	01/02/20 to 16/02/20	-100.00	-88.89	01/02/20 to 30/04/20	
02100010	00006	01/02/20 to 16/02/20	-100.00	-88.89	01/02/20 to 30/04/20	
02100010	00001	01/02/20 to 16/02/20	-100.00	-177.78	01/02/20 to 30/04/20	
02100011	00001	01/02/20 to 16/02/20	-100.00	-177.78	01/02/20 to 30/04/20	
02100011	00006	01/02/20 to 16/02/20	-100.00	-88.89	01/02/20 to 30/04/20	
02100012	00006	01/02/20 to 16/02/20	-100.00	-88.89	01/02/20 to 30/04/20	
02100012	00001	01/02/20 to 16/02/20	-100.00	-177.78	01/02/20 to 30/04/20	

When all input data is verified as correct, select 'Process Add Lots' to complete the process. We recommend the Data Storage option also be set at this stage.

Important Note: When Selecting Option three of Resubdivision Menu – Add New Lots, please note you will need to manually add in the **Custom Levy Entitlement (charge rate)** for the new Lots (if required) by selecting “Details” in the Levy Screen:

Resubdivision / Reallocation of Entitlements KURK TOWERS 121212

Levy Adjustment

Plan/Resub Date: 16/07/2020 Date For Levy Adjustment 16/07/2020

The date for levy adjustment is usually the Registration Date for the Resub. Plan. However you may choose to use the start of the next period if required.

Levies affected

Levy	Include	Levy Type	Period	Rate per U/E	Adjustment	Original Total Charge	Adjusted Total Charge
00008	<input checked="" type="checkbox"/>	Sinking Fund	01/10/20 to 31/12/20	1.00000000	Details Levy total charge changed	1500.00	1700.00
00009	<input checked="" type="checkbox"/>	Sinking Fund	01/01/21 to 31/03/21	1.00000000	Details	1500.00	1500.00
00013	<input checked="" type="checkbox"/>	Insurances	01/07/20 to 30/09/20	0.50000000	Details	611.00	611.00
00014	<input checked="" type="checkbox"/>	Insurances	01/10/20 to 31/12/20	0.50000000	Details	551.00	561.00
00015	<input checked="" type="checkbox"/>	Insurances	01/01/21 to 31/03/21	0.50000000	Details	251.00	251.00
00037	<input checked="" type="checkbox"/>	Admin Fund	01/07/20 to 16/08/20	0.51086957	Details	-102.18	-102.18
00038	<input checked="" type="checkbox"/>	Sinking Fund	01/07/20 to 16/08/20	0.51086957	Details	-102.18	-102.18

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