# PropertylQ

# **Budgets Troubleshooting Guide**

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## Problem:

Building is part way through the financial year and you want to create a proposed budget for next year but can't because the budget is locked.

#### Cause:

Accepting a budget during the current financial year. This might be necessary for a new building that you take on part way into the financial year.

#### Prevention:

Try to avoid this scenario whenever possible but if you take on a building part way through the financial year it may be unavoidable.

Fix:

Email <u>support@propertyiq.com.au</u> They will need to manually unlock the budget for you.

# Problem:

You have just accepted a budget and struck levies and you want to change the budget

#### Prevention:

Always check everything is correct before accepting a budget.

#### Fix:

Email <u>support@propertyiq.com.au</u> They will need to manually unlock the budget for you.

# Problem

The levy period dates need to be changed but the budget *Set Instalments* screen does not allow you to do this.

#### Fix:

If all other aspects of the budget are correct, go ahead and accept the budget and strike the levies. Go to Processing>Adjustments. Select the building

- 1. Filter the screen so it shows the levies you need to alter
- 2. Edit the due date
- 3. Select Realign Period Dates
- 4. Click Save

6 Moo fers Vainte Date	Credit Credit nance 30/11/20	n Cavill 63 Cavill Avenue Transfers Lot Refunds Log of Changes T7 To Date	Bank Adjus	stments Jou	mals Buildi	ng Transfers C	Period From Section Schedule* Date Determ ☑ Allow Dis ☑ Attracts In	Moorings Standard Levy	Period To 30/09/2	019 ule  Apply GST Remove GST No Change							
Lot	Unit	Owner	Due Date 🗸	Period From	Period To	Detai	Accounts	i		- No change		Discount Status	Interest	Levy Section	Admin Amount	Sinking Amount	Status
		1	01/07/2019				Admin	Account Levy In	come 🔎								
1	1	Rocco Silvester	1/7/2019	1/7/2019	30/9/2019	Standard Levy M	Sinking	Account Levy In	come 🔎			~	~	Standard	\$164.98	\$22.22	Unpaid
2	2	Maria Stellino	1/7/2019	1/7/2019	30/9/2019	Standard Levy M	- Please Note	As you have multiple lev	ies selected, only the fiel	ids shown can be all'te	fields you wish	~	~	Standard	\$164.98	\$22.22	Unpaid
3	3	Boltech Pty LTd	1/7/2019	1/7/2019	30/9/2019	Standard Levy M	to change are	not shown above, please	edit in individual levy ed	it mode.		~	~	Standard	\$330.01	\$44.44	Unpaid
4	4	Cella Chan	1///2019	1///2019	30/9/2019	Standard Levy M				🖨 Save	X Cancel	v 	¥	Standard	\$330.01	544.44	Unpaid
о е	6	Costa Gianapolous	1/7/2019	1/7/2019	30/9/2019	Standard Low M	oorings Stan	Magginge Standard	Low Income	Low losomo	*	¥		Standard	\$104.96	\$22.22	Unpaid
7	7	Costa Gianapolous	1/7/2019	1/7/2019	30/9/2019	Standard Levy M	oorings Stan	Moorings Standard	Levy Income	Levy Income	2	· ·	5	Standard	\$104.90	\$22.22	Unpaid
8	8	Costa Giananolous	1/7/2019	1/7/2019	30/9/2019	Standard Levy M	oprings Stan	Moorings Standard	Levy Income	Levy Income	x	1	-	Standard	\$164.98	\$22.22	Unnaid
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# Problem

When printing a budget from the Set Instalments screen, you want to print for the proposed levy year but the budget prints the proposed financial year (or vice versa)

#### Cause:

Settings on the print budget box on the Set Instalments screen

#### Fix:

Change the print option before printing the budget.

ф Recalculate					
		250 Aggregate Units	of Entitlement		
_	Admin	Reserve	Total	Due Date	Levy Period
Pre Issue 1	\$20.8133333300	\$14.6666666700	\$35.480000000	01/02/2019	1/2/2019 - 30/4/2019
nstalment 2	\$36.8568888900	\$9.777777767	\$46.6346666667	01/06/2019	1/5/2019 - 31/7/2019
nstalment 3	\$36.8568888900	\$9.777777767	\$46.6346666667	01/08/2019	1/8/2019 - 31/10/2019
nstalment 4	\$36.8568888900	\$9.777777767	\$46.6346666667	01/11/2019	1/11/2019 - 31/1/2020
inancial Year Total per UOE	\$131.384000000	\$44.000000000	\$175.384000000		
inancial Year Aggregate	\$32,846.00	\$11,000.00	\$43,846.00		
Total Proposed Budget	\$32,846.00	\$11,000.00	\$43,846.00		
Next Pre Issue 1	\$36.8568888900	\$9.7777777767	\$46.6346666667	01/02/2020	1/2/2020 - 30/4/2020
Next Year Pre Issue Aggregate	\$9,214.22	\$2,444.44	\$11,658.67		
Report Options Report Content Detailed Summary udget Breakdown Landscape udget Summary Portrait wner Summary ontribution wmmary	Rey Budg Gru Owne Sp Date f e Lev	port Options et Breakdown: oup Accounts r Summary: lit Schedules Consc period: vy Year Financial Yea	blidated Schedules ar	Report H Proposed Current Previous	Headings Report Type Proposed ▼ Period 01/02/2019 to 31/01/2020 Period 01/02/2018 to 31/01/2019 Period 01/02/2017 to 31/01/2018