

## Budgets Troubleshooting Guide

### CONTENTS

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. ....	1
You have just accepted a budget and struck levies and you want to change the budget.....	2
The levy period dates need to be changed but the budget <i>Set Instalments</i> screen does not allow you to do this. ....	2
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).....	3

### Problem:

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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 [support@propertyiq.com.au](mailto:support@propertyiq.com.au) 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 [support@propertyiq.com.au](mailto:support@propertyiq.com.au) They will need to manually unlock the budget for you.

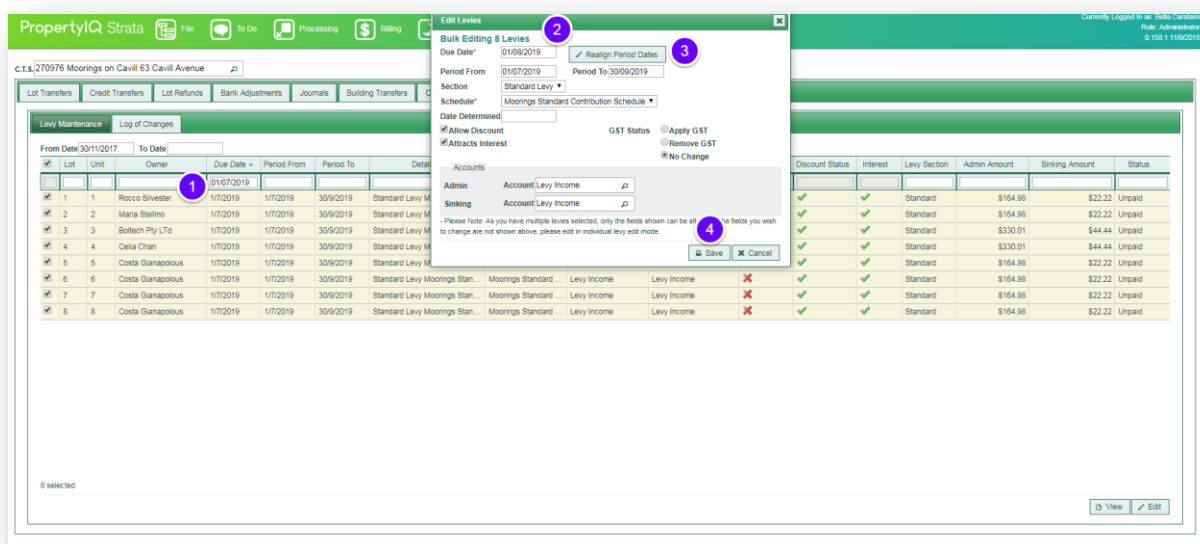
## Problem

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*



## 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.

The screenshot shows the 'Instalments' window with a table of instalment details and a 'Report Options' section. The table has columns for Admin, Reserve, Total, Due Date, and Levy Period. The 'Report Options' section includes 'Report Content' (Detailed/Summary), 'Report Options' (Budget Breakdown, Owner Summary, Date period), and 'Report Headings' (Report Type, Proposed Period, Current Period, Previous Period). A red box highlights the 'Date period' section where 'Levy Year' is selected.

	Admin	Reserve	Total	Due Date	Levy Period
Pre Issue 1	\$20.8133333300	\$14.6666666700	\$35.4800000000	01/02/2019	1/2/2019 - 30/4/2019
Instalment 2	\$36.8568888900	\$9.7777777767	\$46.6346666667	01/06/2019	1/5/2019 - 31/7/2019
Instalment 3	\$36.8568888900	\$9.7777777767	\$46.6346666667	01/08/2019	1/8/2019 - 31/10/2019
Instalment 4	\$36.8568888900	\$9.7777777767	\$46.6346666667	01/11/2019	1/11/2019 - 31/1/2020
Financial Year Total per UOE	\$131.3840000000	\$44.0000000000	\$175.3840000000		
Financial 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 (selected) | Summary

Budget Breakdown: ☒ Landscape ☐ Portrait

Budget Summary: ☒ ☐

Owner Summary: ☒ ☐

Contribution Summary: ☒ ☐

Report Options: Budget Breakdown: ☐ Group Accounts

Owner Summary: ☒ Split Schedules ☐ Consolidated Schedules

Date period: ☒ Levy Year ☐ Financial Year

Report Headings: Report Type: Proposed

Proposed Period: 01/02/2019 to 31/01/2020

Current Period: 01/02/2018 to 31/01/2019

Previous Period: 01/02/2017 to 31/01/2018

Buttons: Print, ! Accept Budget, Save & Exit, X Exit