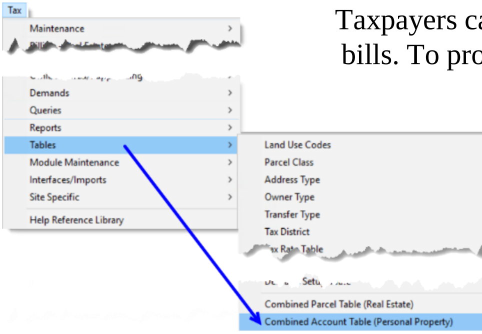
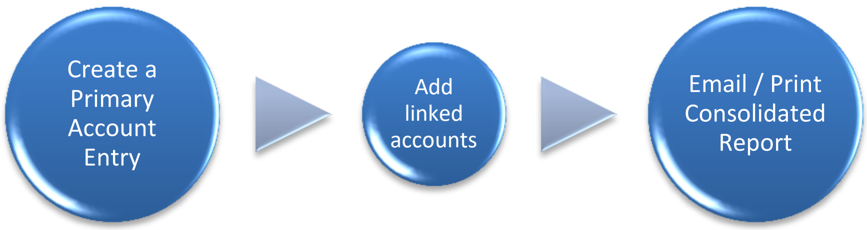


Taxpayers can have multiple accounts, and as such, multiple Personal Property Tax bills. To provide a consolidated list of bills for a taxpayer, use the **Combined Account Table**. Select **Tax ▶ Tables ▶ Combined Account Table (Personal Property)** to group multiple bills for an owner.

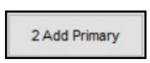
Note: this feature allows grouping of accounts that currently exist in the bill history file. Grouping and ungrouping does not add or remove accounts from bill history.



1. Create Primary

To begin, click on **[2 Add Primary]** to create a **Primary Account** ("parent" record). **A Primary Account** number is used to group accounts together for reporting purposes.

1.1. [2 Add Primary]



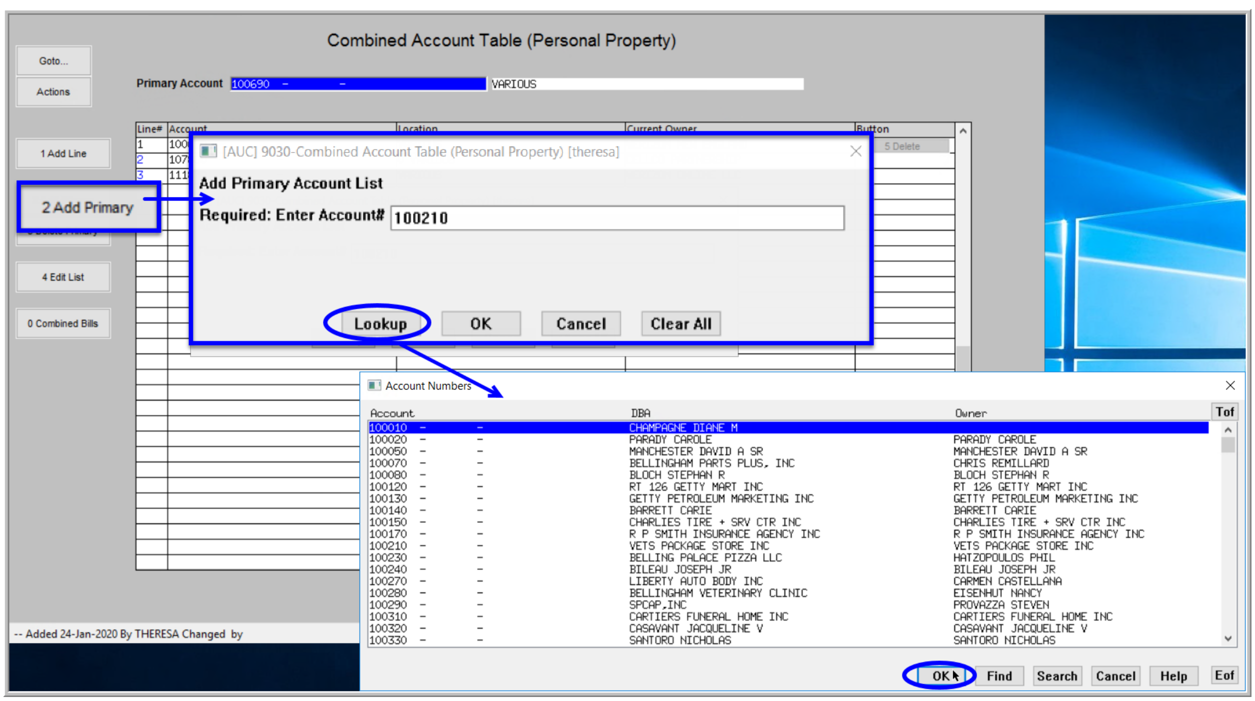


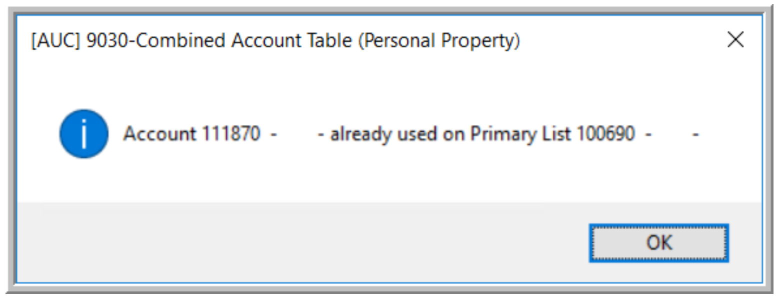
Figure 1 Adding a Primary Account

The system will display a prompt for the **Primary Account** number. Select the account from a lookup of all accounts currently in bill history or enter it into the field. Click **[OK]**.

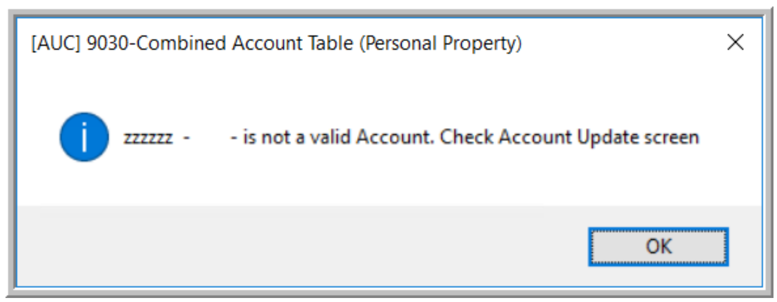
A **Primary Account** (“parent” record) can have multiple linked accounts (“child” records). A **Primary Account** ***cannot*** appear as a linked account (“child” record) on another **Primary Account** list.

1.1.1. Information & Error Messages

When adding a new **Primary Account**, the system checks that the account number entered does not already belong to another primary account. A popup will show the Primary List on which the account already appears.



When adding a new **Primary Account**, the system checks that the account number is a valid number in the Billing History files; if not, an information message will pop up:



1.2. [1 Add Line] Add Linked Account(s) to Primary Account

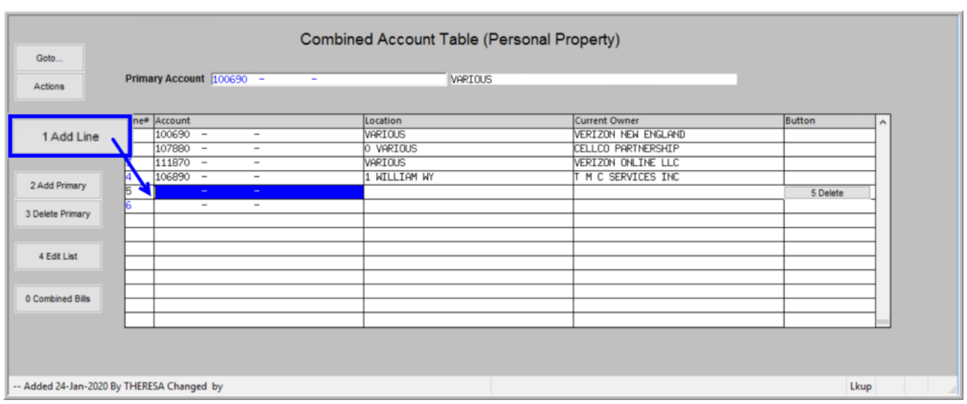


Figure 2 The Primary (“parent”) account with several linked (“child”) accounts

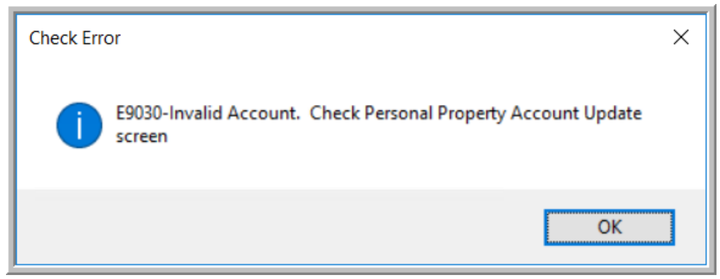
Establish links by typing the account number directly on the screen. If the account number entered is found, and there is a current year bill for the account number, the system will populate the **Location** and **Current Owner** fields.

As new numbers are entered, the system verifies that the numbers do not already belong to another primary account.

By default, the system provides five lines for linking accounts; if more are needed, select the **[1 Add Line]** button; the system will display a new numbered line ready for data entry. Continue entering until all the accounts to be linked appear in the screen.

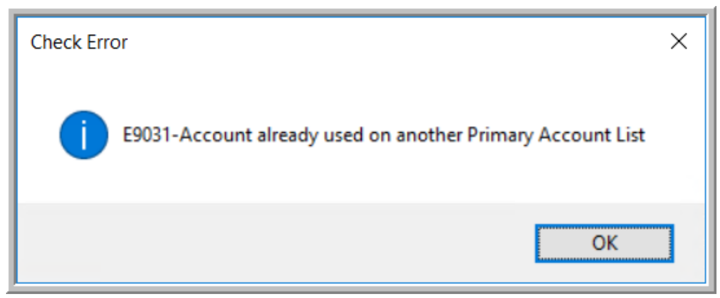
1.2.1. Information & Error Messages

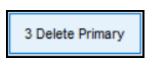
If the account number does not exist in billing history, the system will display a message to check the account number:



When entering the account number, check for:
alpha **"O"** (oh) versus a numeric **"0"** (zero)
alpha **"l"** (ell) versus a numeric **"1"** (one)
.

If the number is found on an existing combined account list, the system will display an information box:



1.3. Deleting a Primary Account 

To delete a primary account, it is not necessary to delete the linked accounts. Simply click on the **[3 Delete Primary]** button. The system will pop up a confirmation prompt; click on **[Yes]**. This will delete the complete list and release the primary and linked accounts for use on other combined lists.

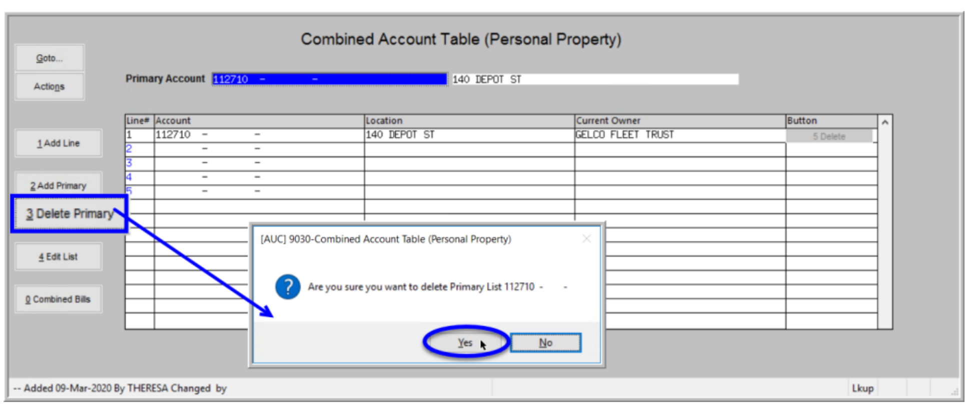


Figure 3 Deleting a Primary Account from the Combined Account Table

1.3.1. Remove a Linked ("child") Account from a Primary Account

There are two methods to delete a ***linked*** (child) account; either click on the **[5 Delete]** button to remove the entire line or position the cursor in the **Account #** field and hit **{Spacebar}|{Enter}.**

Any ensuing blank line may be re-used for another linked account. If all five lines are not used, leave them blank. The primary account is always the first line on the list and cannot be edited or deleted.

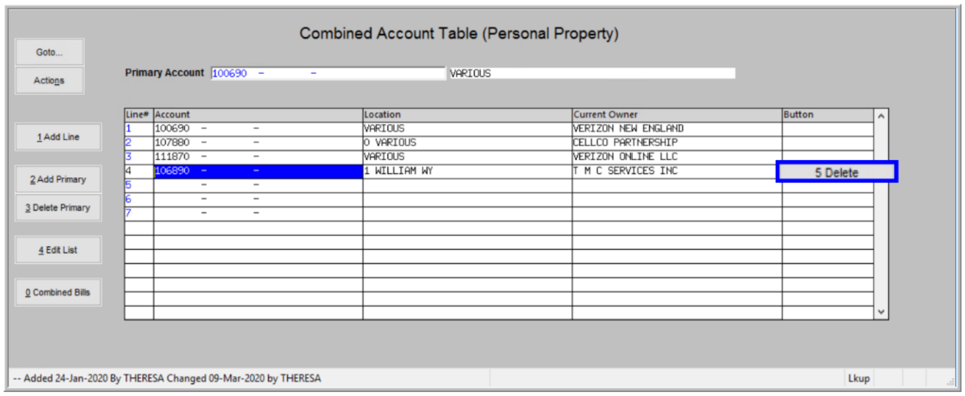
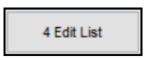


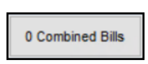
Figure 4 Deleting linked account numbers from a primary account

1.4. Edit List 

Click on the **[4 Edit List]** button to print a list of all the Primary accounts with their linked account numbers. The Edit List may be filtered to select between one and nine primary account numbers. An example is shown in **Figure 5 – "Run as" Excel®**.

	A	B	C	D	E	F	G
1	Primary-Account	Location	Line	Account	Location	Current-Owner	DBA-Name
2	100650 - -	VARIOUS	1	100650 - -	VARIOUS	MASS ELECTRIC	MASS ELECTRIC
3			2	100670 - -	VARIOUS	NEW ENGLAND POWER COMPANY	NEW ENGLAND POWER COMPANY
4			3	100680 - -	VARIOUS	NSTAR ELECTRIC AND GAS COMPANY	NSTAR ELECTRIC AND GAS COMPANY
5							
6	100690 - -	VARIOUS	1	100690 - -	VARIOUS	VERIZON NEW ENGLAND	VERIZON NEW ENGLAND
7			2	107880 - -	0 VARIOUS	CELLCO PARTNERSHIP	VERIZON WIRELESS
8			3	111870 - -	VARIOUS	VERIZON ONLINE LLC	VERIZON ONLINE LLC
9			4	106890 - -	1 WILLIAM WY	T M C SERVICES INC	T M C SERVICES INC
10							
11	112710 - -	140 DEPOT ST	1	112710 - -	140 DEPOT ST	GELCO FLEET TRUST	GELCO FLEET TRUST
12							
13							
14							
15							
16							

Figure 5 Sample Edit List in Excel® format

1.5. Generate a Combined Bill Statement 

Click on the **[0 Combined Bills]** button to generate the consolidated statement. The report may be emailed to any valid email address; the prompt fields are described below **Figure 6**.

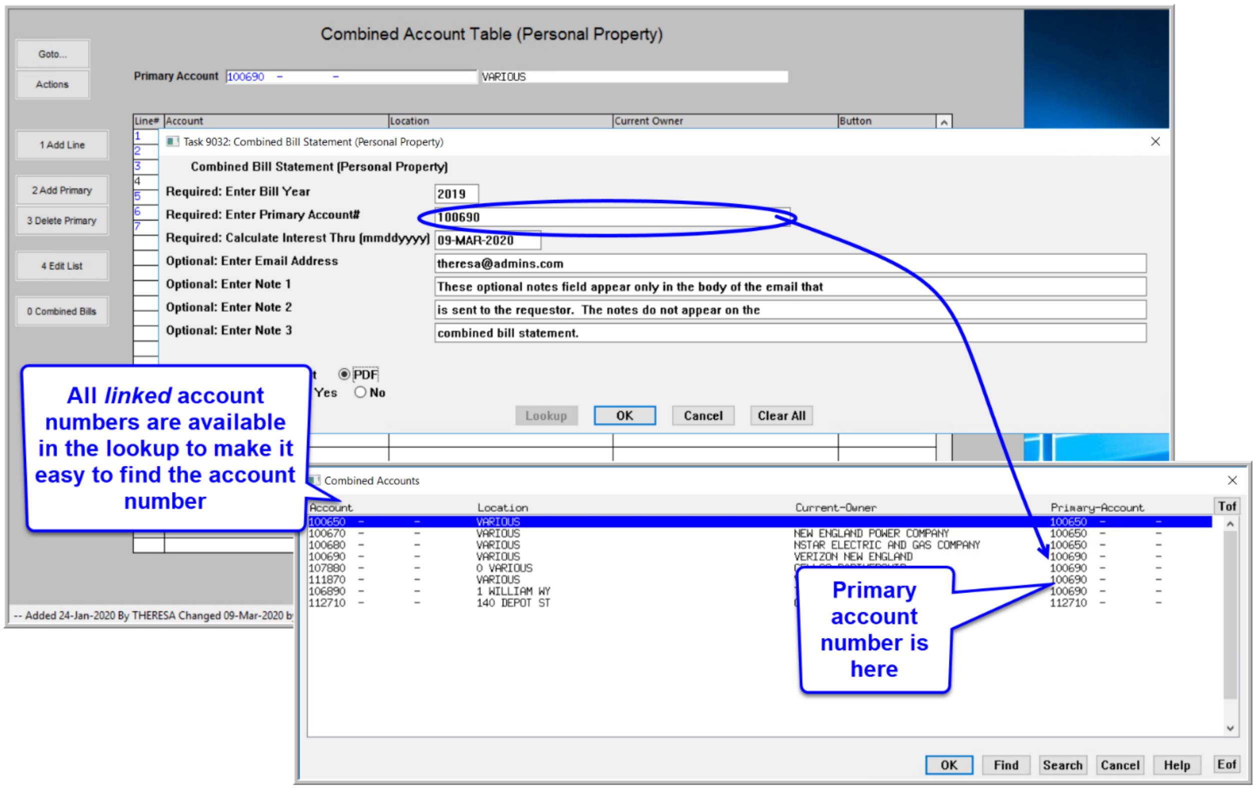
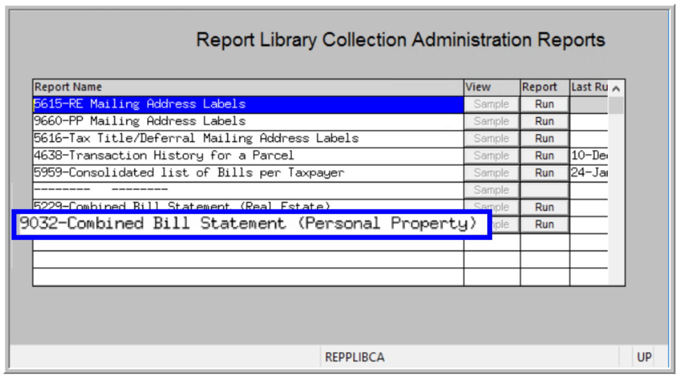


Figure 6 The Combined Bills report

Prompt (Required in Bold)	Description
Enter Bill Year	Enter the four-digit year for the bills being combined and reported on. Bills to be combined must be from the same bill year.
Enter Primary Account #	Enter the "Primary" or "parent" account number – select it from the lookup to ensure the correct number is chosen.
Calculate Interest Thru	Enter the date for the calculation of interest. The value will default to the current date but can be changed as needed. The format is mmddyyyy – so January 15, 2020 should be entered as 01152020 or may be selected from the calendar lookup.
Enter Email Address	If emailing to a requestor, enter the email address here. A copy will be delivered to the person running the report if their email address is entered on the user profile table.
Enter Note 1	If a note is to be included in the body of the email, enter it here. Eighty characters maximum in this field; use the Note 2 and Note 3 fields if more is needed.
Enter Note 2	Additional notes to be included in the body of the email.
Enter Note 3	Additional notes to be included in the body of the email.
Run as ⦿Preview **⦿Print ⦿Pdf**	This report should always be run as **⦿ PDF**
If Printing use Duplex **⦿Yes ⦿No**	The default varies from site to site and is set by the **ADMINS** installer

The same report is available from the **Tax ▶ Reports ▶ Collection Admin Reports** menu and the **Collections ▶ Reports ▶ Report Library**:



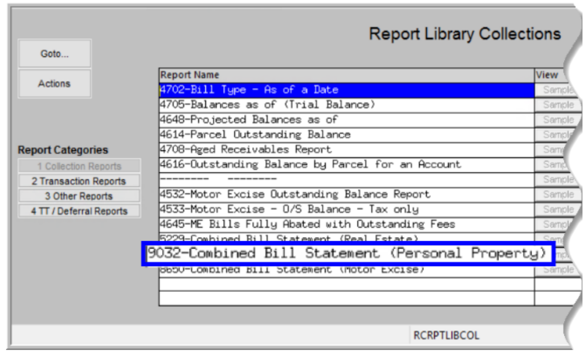
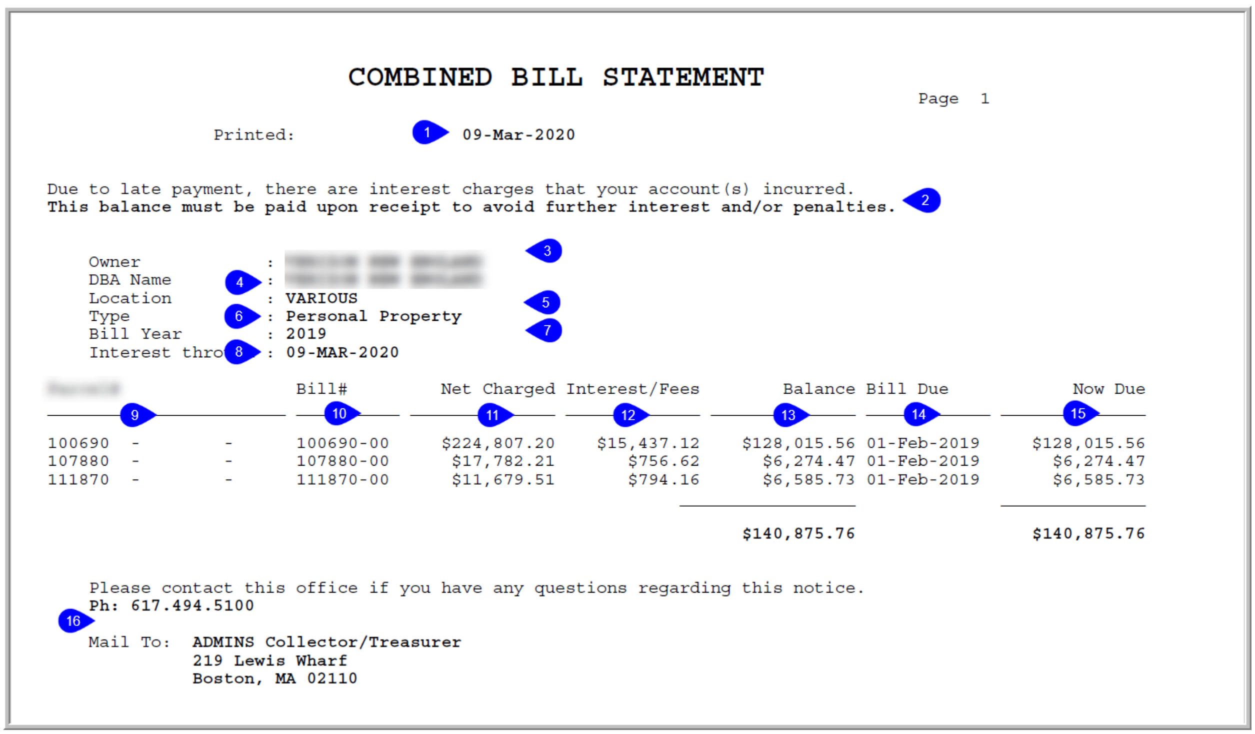


Figure 7 Combined Bill Statement available in report libraries

1.5.1. Report Layout



COMBINED BILL STATEMENT

Page 1

Printed: 09-Mar-2020

Due to late payment, there are interest charges that your account(s) incurred.
This balance must be paid upon receipt to avoid further interest and/or penalties.

Owner :
DBA Name :
Location : VARIOUS
Type : Personal Property
Bill Year : 2019
Interest thro : 09-MAR-2020

			Bill#	Net Charged	Interest/Fees	Balance	Bill Due	Now Due
100690	-	-	100690-00	$224,807.20	$15,437.12	$128,015.56	01-Feb-2019	$128,015.56
107880	-	-	107880-00	$17,782.21	$756.62	$6,274.47	01-Feb-2019	$6,274.47
111870	-	-	111870-00	$11,679.51	$794.16	$6,585.73	01-Feb-2019	$6,585.73
						$140,875.76		$140,875.76

Please contact this office if you have any questions regarding this notice.
Ph: 617.494.5100

Mail To: ADMINS Collector/Treasurer
219 Lewis Wharf
Boston, MA 02110

Figure 8 The Combined Bill Statement explained

The report layout – Header section– numbers below correspond to the numbers on Figure 8	
1.	Date report printed
2.	Variable messages depending on if any of the bills are overdue
3.	Owner of the primary account#
4.	DBA Name of primary account

The report layout – Header section– numbers below correspond to the numbers on Figure 8	
5.	Location
6.	What bill type is being combined
7.	What bill year was used
8.	Interest (if any) will be calculated through this date

Note**:** the detail section **(#s 9 – 16)** of the report will be in Bill# order

The report layout – Detail section– numbers below correspond to the numbers on Figure 8	
9.	Account# and owner name of each of the account numbers entered on the combined account table
10.	Bill Number
11.	Net Charged (this is the Bill charges minus deductions, if any)
12.	Any interest and fees
13.	Total balance owed
14.	Bill due date of the first quarter that has an outstanding balance
15.	Now due is the amount that is past due
16.	Collections forms Table data for the municipality address and phone

The address shown in #16 is set via **Collections ▸ Tables ▸ Forms Text and Parameter ▸ [2 Personal Property].**

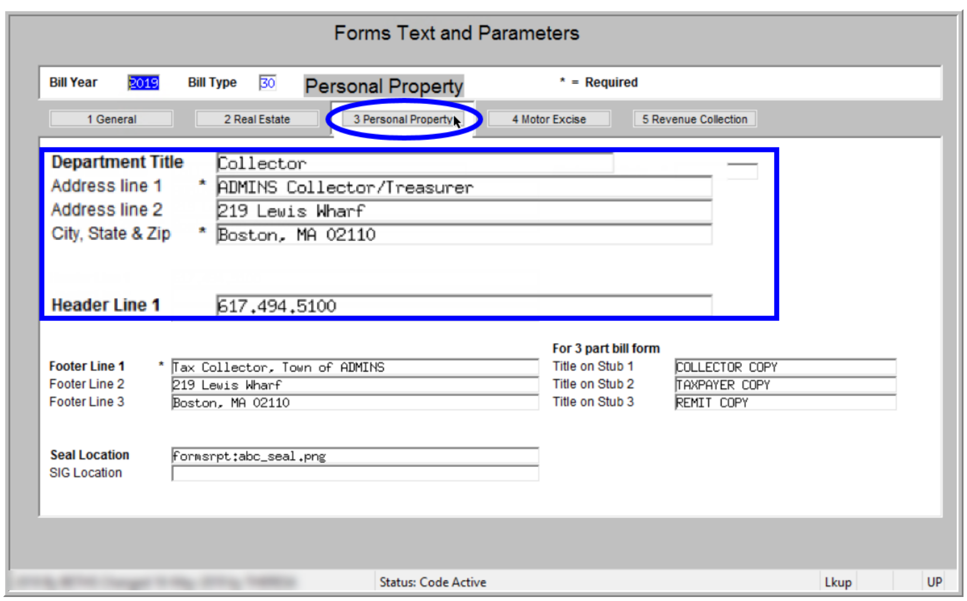


Figure 9 The Collections ▸ Tables ▸ Forms Text and Parameter ▸ [2 Personal Property] tab

1.5.2. Email the Statement to Any Valid Email Address

Once the bills are grouped, run a report of all the Personal Property bills for the requestor. The report may be emailed or printed for distribution. The report includes outstanding balances and interest. The emailed report will be produced in **PDF®**; always **Run as ⦿ PDF®** to preserve the formatting appearance.

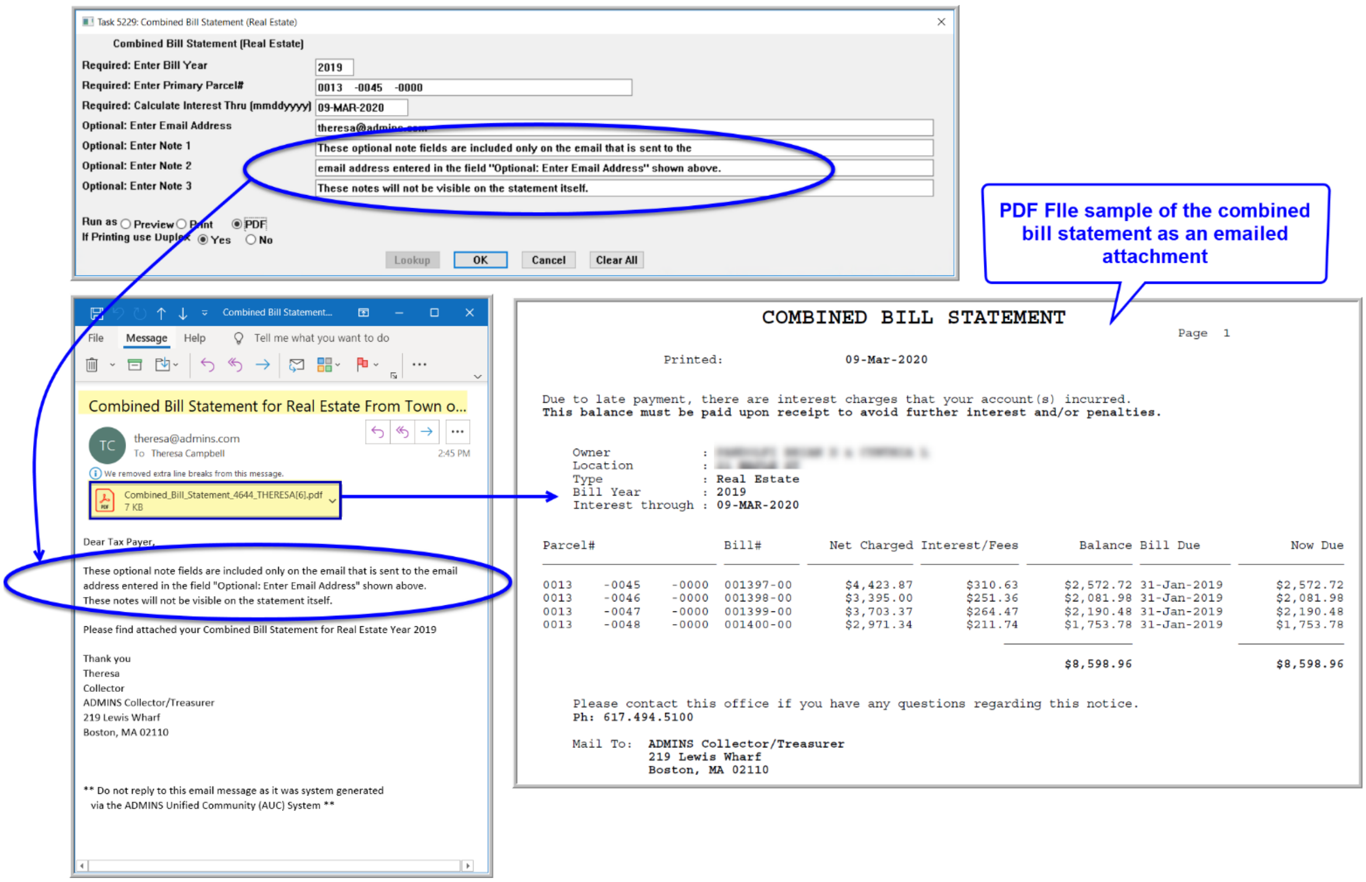


Figure 10 Sample Combined Account report may be printed or emailed