

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] 2 Add Primary

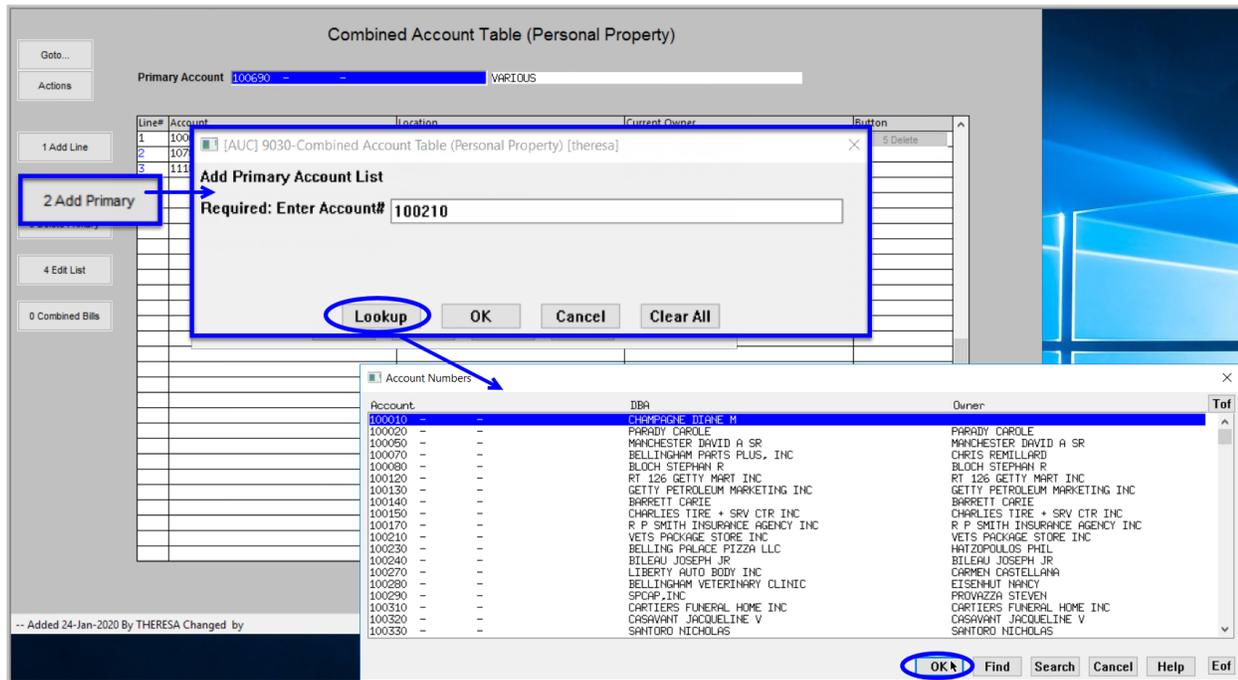


Figure 1 Adding a Primary Account

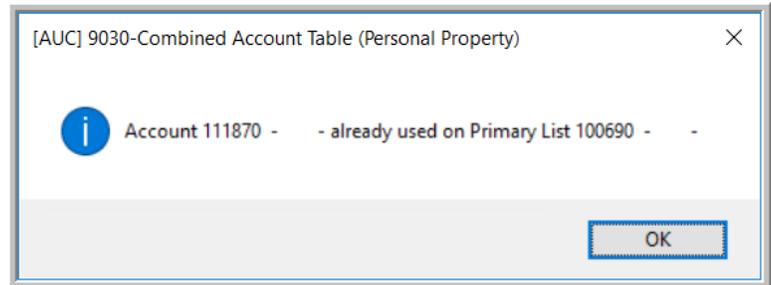


The system will display a prompt for the **Primary Account** number. Select the account from a lookup of all accounts currently in bill history or enter it into the field. Click **[OK]**.

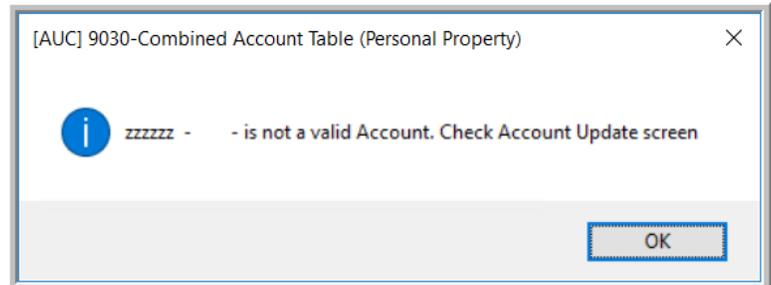
A **Primary Account** (“parent” record) can have multiple linked accounts (“child” records). A **Primary Account cannot** appear as a linked account (“child” record) on another **Primary Account** list.

### 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

Combined Account Table (Personal Property)

Primary Account: 100690 - - VARIOUS

Line#	Account	Location	Current Owner	Button
1	100690	VARIOUS	VERIZON NEW ENGLAND	
2	107880	0 VARIOUS	CELCO PARTNERSHIP	
3	111870	VARIOUS	VERIZON ONLINE LLC	
4	106890	1 HILLIAM NY	T M C SERVICES INC	
5	-	-	-	5 Delete
6	-	-	-	

Buttons: 1 Add Line, 2 Add Primary, 3 Delete Primary, 4 Edit List, 0 Combined Bills

Footer: -- Added 24-Jan-2020 By THERESA Changed by Lkup

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.

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

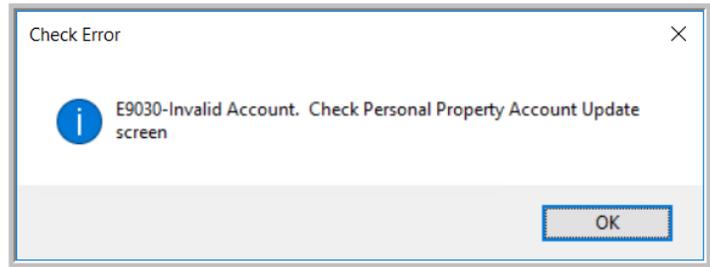
As new numbers are entered, the system verifies that the numbers do not already belong to another primary account.

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.



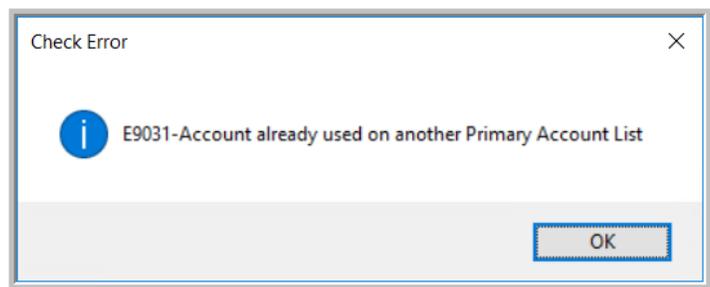
### 1.2.1. Information & Error Messages

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

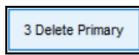


When entering the account number, check for:  
alpha "0" (oh) versus a numeric "0" (zero)  
alpha "1" (ell) versus a numeric "1" (one)

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.

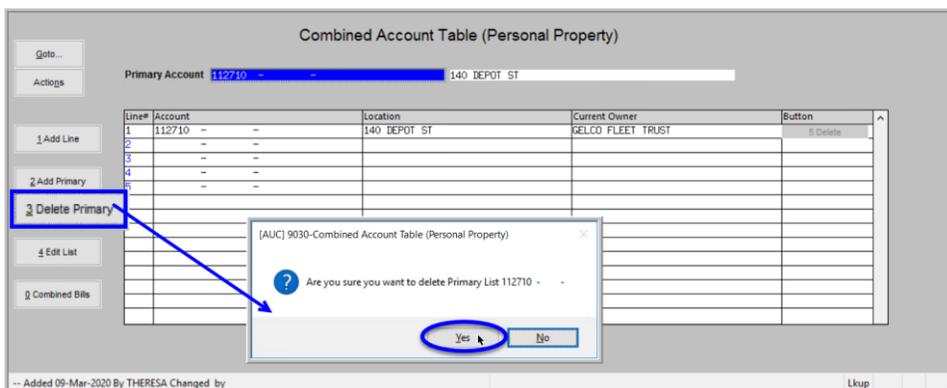
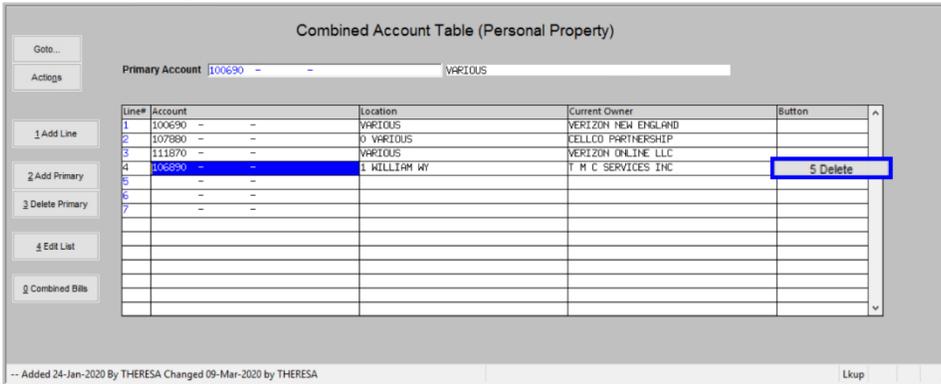


Figure 3 Deleting a Primary Account from the Combined Account Table



### 1.3.1. Remove a Linked (“child”) Account from a Primary Account

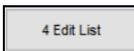
There are two methods to delete a **linked** (child) account; either click on the [5 Delete] button to remove the entire line or position the cursor in the **Account #** field and hit {Spacebar}{Enter}.



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

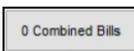


Click on the [4 Edit List] button to print a list of all the Primary accounts with their linked account numbers. The Edit List may be filtered to select between one and nine primary account numbers. An example is shown in **Figure 5 – “Run as” Excel®**.

	A	B	C	D	E	F	G
	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
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
11	112710 - -	140 DEPOT ST	1	112710 - -	140 DEPOT ST	GELCO FLEET TRUST	GELCO FLEET TRUST

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**.



**Combined Account Table (Personal Property)**

Primary Account: 100690 - - VARIOUS

**Combined Bill Statement (Personal Property)**

Required: Enter Bill Year: 2019

Required: Enter Primary Account#: 100690

Required: Calculate Interest Thru (mmddyyyy): 09-MAR-2020

Optional: Enter Email Address: theresa@admins.com

Optional: Enter Note 1: These optional notes field appear only in the body of the email that is sent to the requestor. The notes do not appear on the combined bill statement.

Optional: Enter Note 2:

Optional: Enter Note 3:

PDF:  Yes  No

Buttons: Lookup, OK, Cancel, Clear All

**Combined Accounts**

Account	Location	Current-Owner	Primary-Account	Tot
100650	-	VARIOUS	100650	-
100670	-	VARIOUS	100650	-
100680	-	VARIOUS	100650	-
100690	-	VARIOUS	100690	-
107890	-	0 VARIOUS	100690	-
111870	-	VARIOUS	100690	-
106890	-	1 WILLIAM HY	100690	-
112710	-	140 DEPOT ST	112710	-

Buttons: OK, Find, Search, Cancel, Help, Eof

Figure 6 The Combined Bills report

Prompt (Required in Bold)	Description
<b>Enter Bill Year</b>	Enter the four-digit year for the bills being combined and reported on. Bills to be combined must be from the same bill year.
<b>Enter Primary Account #</b>	Enter the "Primary" or "parent" account number – select it from the lookup to ensure the correct number is chosen.
<b>Calculate Interest Thru</b>	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 <input type="radio"/> Preview <input checked="" type="radio"/> Print <input checked="" type="radio"/> Pdf	This report should always be run as <input checked="" type="radio"/> PDF
If Printing use Duplex <input checked="" type="radio"/> Yes <input type="radio"/> No	The default varies from site to site and is set by the <b>ADMINS</b> installer



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

Report Name	View	Report	Last Ru
5615-RE Mailing Address Labels	Sample	Run	
9660-PP Mailing Address Labels	Sample	Run	
5616-Tax Title/Deferral Mailing Address Labels	Sample	Run	
4638-Transaction History for a Parcel	Sample	Run	10-De
5959-Consolidated list of Bills per Taxpayer	Sample	Run	24-Ja
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5229-Combined Bill Statement (Real Estate)	Sample	Run	
<b>9032-Combined Bill Statement (Personal Property)</b>	Sample	Run	

REPPLIBCA UP

Report Name	View
<b>4702-Bill Type - As of a Date</b>	Sample
4705-Balances as of (Trial Balance)	Sample
4648-Projected Balances as of	Sample
4614-Parcel Outstanding Balance	Sample
4708-Aged Receivables Report	Sample
4616-Outstanding Balance by Parcel for an Account	Sample
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4532-Motor Excise Outstanding Balance Report	Sample
4533-Motor Excise - 0/5 Balance - Tax only	Sample
4645-ME Bills Fully Abated with Outstanding Fees	Sample
<b>5229-Combined Bill Statement (Real Estate)</b>	Sample
<b>9032-Combined Bill Statement (Personal Property)</b>	Sample
9030-Combined Bill Statement (Motor Excise)	Sample

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Figure 7 Combined Bill Statement available in report libraries

### 1.5.1. Report Layout

COMBINED BILL STATEMENT							
Printed:						Page 1	
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 :		[REDACTED]					
DBA Name :		[REDACTED]					
Location :		VARIOUS					
Type :		Personal Property					
Bill Year :		2019					
Interest thro :		09-MAR-2020					
Account#	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]**.

Forms Text and Parameters

Bill Year: 2019 Bill Type: 30 Personal Property \* - Required

1 General 2 Real Estate 3 Personal Property 4 Motor Excise 5 Revenue Collection

Department Title: Collector

Address line 1: \* ADMINS Collector/Treasurer

Address line 2: 219 Lewis Wharf

City, State & Zip: \* Boston, MA 02110

Header Line 1: 617,494,5100

Footer Line 1: \* Tax Collector, Town of ADMINS

Footer Line 2: 219 Lewis Wharf

Footer Line 3: Boston, MA 02110

Seal Location: Formsrpt:abc\_seal.png

SIG Location:

For 3 part bill form

Title on Stub 1: COLLECTOR COPY

Title on Stub 2: TAXPAYER COPY

Title on Stub 3: REMIT COPY

Status: Code Active Lkup UP

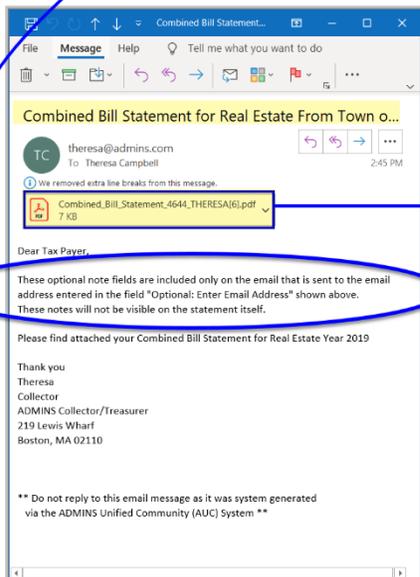
Figure 9 The Collections ▶ Tables ▶ Forms Text and Parameter ▶ [2 Personal Property] tab



### 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.

PDF File sample of the combined bill statement as an emailed attachment



**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 : [REDACTED]  
Location : [REDACTED]  
Type : Real Estate  
Bill Year : 2019  
Interest through : 09-MAR-2020

Parcel#	Bill#	Net Charged Interest/Fees	Balance	Bill Due	Now Due
0013	-0045 -0000 001397-00	\$4,423.87	\$310.63	\$2,572.72	31-Jan-2019 \$2,572.72
0013	-0046 -0000 001398-00	\$3,395.00	\$251.36	\$2,081.98	31-Jan-2019 \$2,081.98
0013	-0047 -0000 001399-00	\$3,703.37	\$264.47	\$2,190.48	31-Jan-2019 \$2,190.48
0013	-0048 -0000 001400-00	\$2,971.34	\$211.74	\$1,753.78	31-Jan-2019 \$1,753.78
<b>\$8,598.96</b>					<b>\$8,598.96</b>

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 10 Sample Combined Account report may be printed or emailed