



PERSONAL PROPERTY TAX

RELEASE NOTES – SEPTEMBER 2020

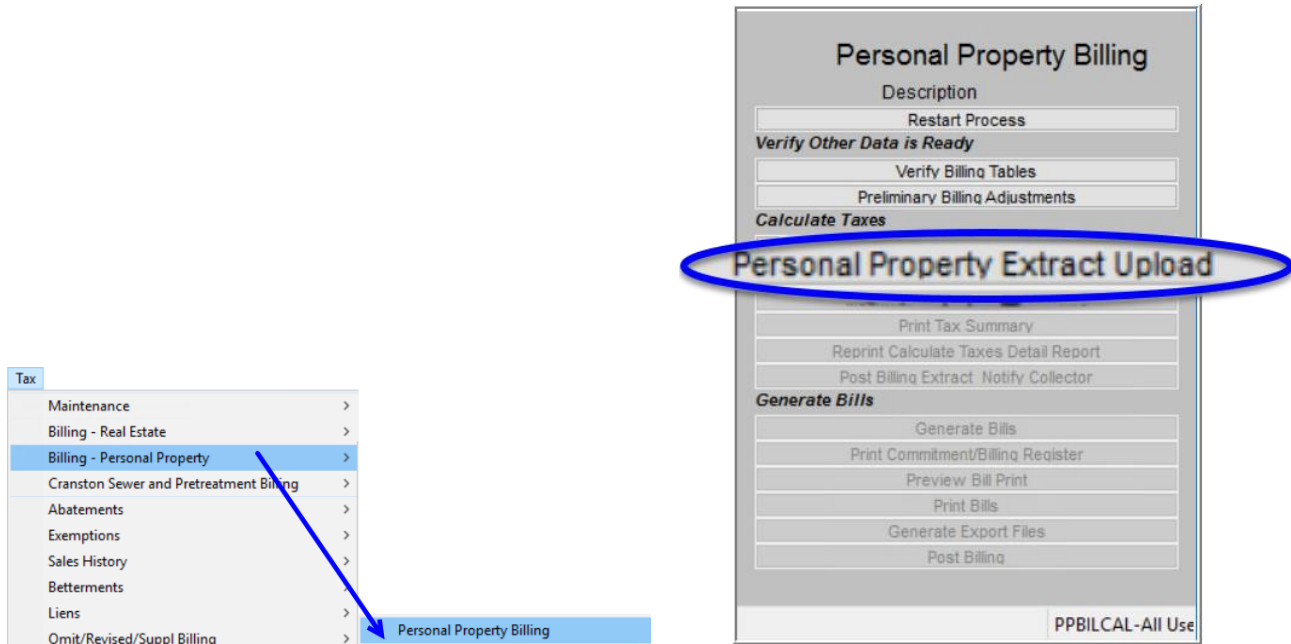
This document explains new product enhancements added to the **ADMINS Unified Community for Windows PERSONAL PROPERTY TAX** system.

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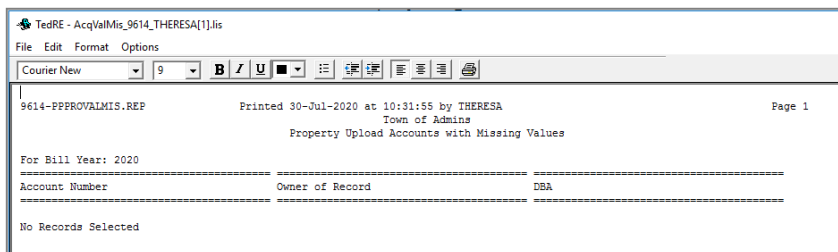
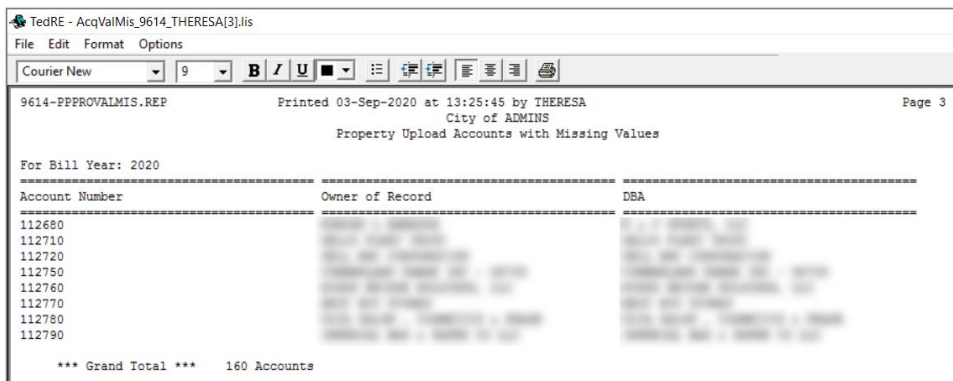
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1. APPRAISAL UPLOAD –ACCOUNTS MISSING VALUES [Enhancement]



ADMINS added a new report to show **uploaded accounts that are missing values** during the upload of a Personal Property file from the Appraisal system. This report will help match the number of accounts between **AUC** and the appraisal system. Combine the **“Upload accounts with Missing Values”** count total and the **Uploaded Accounts** count total to match the export **count** from the appraisal system.



If there are no accounts with missing values, the report will indicate so with a **“No Records Selected”** note.

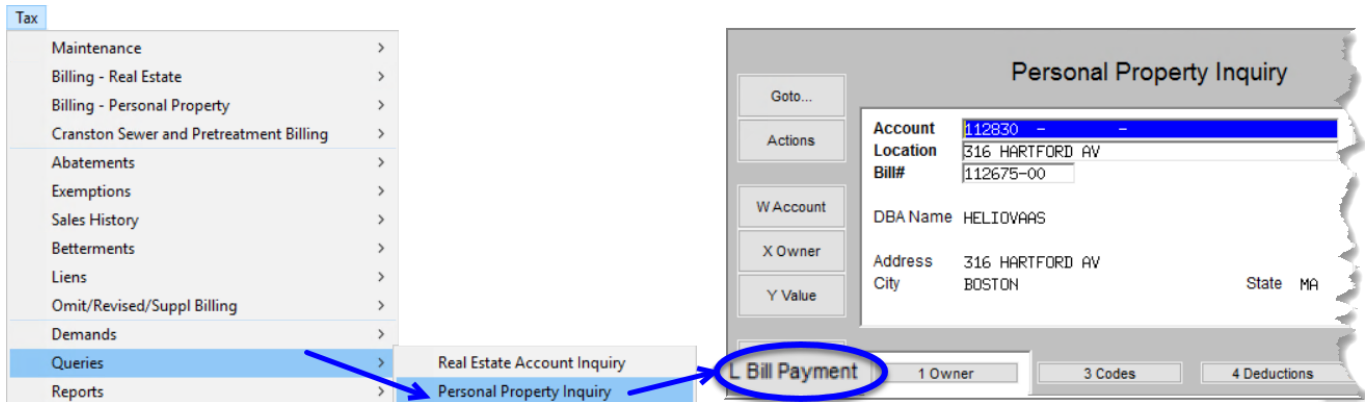
[ADM-AUC-PP-3867]



2. BILL PAYMENT SCREEN → Reports [Enhancement]

ADMINS added two new options under the [Reports] button on the Bill Payment screen. To access the Bill Payment screen from the Personal Property Tax menu, select:

Tax ▶ Queries ▶ Personal Property Inquiry ▶ [L Bill Payment]



The new reports are a “History List” and a “Summary List”. The data on the reports is shown for the currently selected bill. These reports are available for Real Estate, Motor Excise, and Personal Property/Tangible tax transactions.

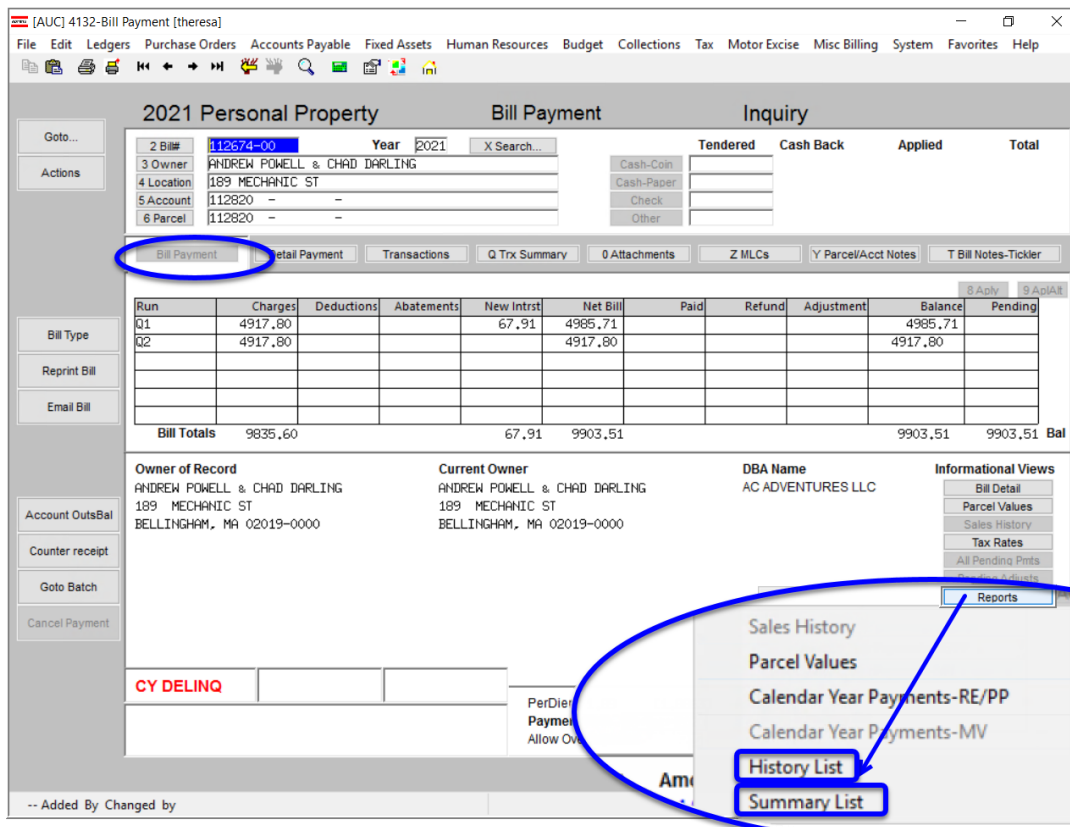


Figure 1 Bill Payment Inquiry screen with new Reports → History List, Summary List



2.1. #4635 Transaction History Listing

Select “History List” from the [Reports] button to display this prompt, select a “Run as” option, and click on [OK]:

Task 4635: Transaction History Listing

Transaction History Listing

Run as Preview Print PDF CSV Excel

If Printing use Duplex Yes No

Lookup OK Cancel Clear All

TedRE - TrmHisDet_4635_THERESA[6].lis

File Edit Format Options

Courier New 8 B I U

4635-RCRTRNHISDET_AUC.REP Printed 14-Sep-2020 at 11:38:06 by THERESA Page 1

City of ADMINS
Transaction History Listing

Year: 2021
Type: 30 Personal Property
Bill#: 112473-00
Owner: [REDACTED]
Parcel: 110220--
Location: 250 HARTFORD AV

Transactions posted on this account
as of 11:38:06 on 14-Sep-2020

Date Billed	Date Due	Last InterestDate	Category	Transaction Description	Trx Date	Charges	Adjustments	Refunds	Abatements	Deductions	Payments	Transaction Balance
01-Jul-2020	03-Aug-2020	04-Aug-2020	Tax	Billing	01-Jul-2020	111.17						111.17
						111.17						111.17
01-Oct-2020	02-Nov-2020	03-Nov-2020	Tax	Billing	01-Oct-2020	111.17						111.17
						111.17						111.17
*** Grand Total ***						222.34						222.34

*** Please Note ***
If there is an outstanding balance due on this account then interest charges will accrue but are not displayed here.

Figure 2 Transaction History list for Personal Property Account run as Print/Preview/PDF®

TrmHisDet_4635_THERESA[6].xml - Excel

File Home Insert Page Layout Formulas Data Review View Tell me what you want to do...

U15

Year	Bill Number	Owner	Parcel	Location	Run	Date Billed	Date Due	Last Int Date	Category	Transaction Description	Trx Date	Charges	Adjustments	Refunds	Abatements	Deductions	Payments	Trx Balance
2021	112473-00	[REDACTED]	110220--	250 HARTFORD AV	1	7/1/2020	8/3/2020	8/4/2020	Tax	Billing	7/1/2020	111.17						111.17
2021	112473-00	[REDACTED]	110220--	250 HARTFORD AV	2	10/1/2020	11/2/2020	11/3/2020	Tax	Billing	10/1/2020	111.17						111.17
Grand Total												222.34						222.34

Figure 3 Transaction History list for Personal Property Account run as Excel®



2.2. #4639 Summary List

Select “Summary List” from the [Reports] button to display this prompt, select a “Run as” option, and click on [OK]:

Task 4639: Transaction History Summary

Transaction History Summary

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

Lookup OK Cancel Clear All

TedRE - TrnHisSum_4639_THERESA[S].lis
Printed 14-Sep-2020 at 11:41:34 by THERESA
City of ADMINS
Transaction History Summary
Page 1

Year: 2019
Type: 30 Personal Property
Bill#: 100070-00
Owner: [REDACTED] as of 11:41:34 on 14-Sep-2020
Parcel: 100070--
Location: 794 SOUTH MAIN ST

Tx Date	Tax Charge	CPA Charge	Tax + CPA	Tax Abt/Exm	CPA Abt/Exm	Oth Abt/Exm	Liens	Betterments	Other Charges	Adjustments	Refunds	Payments	Description
29-Jun-2018	52.39	.00	52.39	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00 Billing
13-Sep-2018	.00	.00	.00	.00	.00	.00	.00	.00	.86	.00	.00	.00	52.39 TAX - CITIZENS
01-Oct-2018	52.39	.00	52.39	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00 Billing
18-Oct-2018	.00	.00	.00	.00	.00	.00	.00	.00	.01	.00	.00	.00	53.27 TAX - CITIZENS
01-Dec-2018	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00 BILLING ADJUSTED CREDIT B
01-Dec-2018	43.31	.00	43.31	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00 Billing
01-Mar-2019	43.31	.00	43.31	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00 Billing
	191.40	.00	191.40	.00	.00	.00	.00	.00	.87	.00	.00	105.66	

Figure 4 Summary List run for Personal Property Tax run as Print/Preview/PDF®

TrnHisSum_4639_THERESA[6].xml - Excel

R39

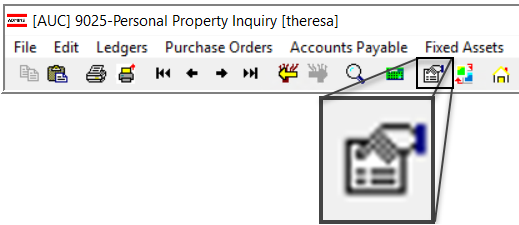
Tx Date	Tax Charge	CPA Charge	Tax + CPA	Tax Abt/Exm	CPA Abt/Exm	Oth Abt/Exm	Liens	Betterments	Other Charges	Adjustments	Refunds	Payments	Description
29-Jun-2018	52.39	0.00	52.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Billing
13-Sep-2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.86	0.00	0.00	0.00	TAX - CITIZENS
01-Oct-2018	52.39	0.00	52.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Billing
18-Oct-2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	TAX - CITIZENS
01-Dec-2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	BILLING ADJUSTED CREDIT BALAN
01-Dec-2018	43.31	0.00	43.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Billing
01-Mar-2019	43.31	0.00	43.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Billing
	191.40	0.00	191.40	0.00	0.00	0.00	0.00	0.00	0.87	0.00	0.00	105.66	

Figure 5 Summary List run for Personal Property Tax in Excel®

[ADM-AUC-RC-8488]



3. QUICK REPORT SELECTOR [Enhancement]



The **Quick Report/Task Selector** button is in the toolbar on all **AUC** screens. This feature allows a user to run any report in **AUC** quickly from any module instead of going to the report library for each module. Read **SY-117 Quick Report Selector** in the Help Reference Library for details on how to use this feature.

[ADM-AUC-DOC-183]

4. USERS MAY NOW CHANGE / SET AUC PASSWORDS [Enhancement]

ADMINS added a **[Reset Password]** button on the login screen that allows users to reset their own **AUC** passwords. The feature requires an email address on the user profile for the user account.

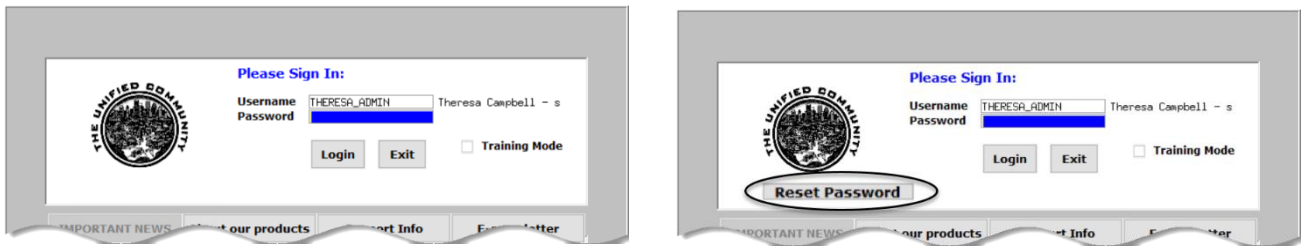
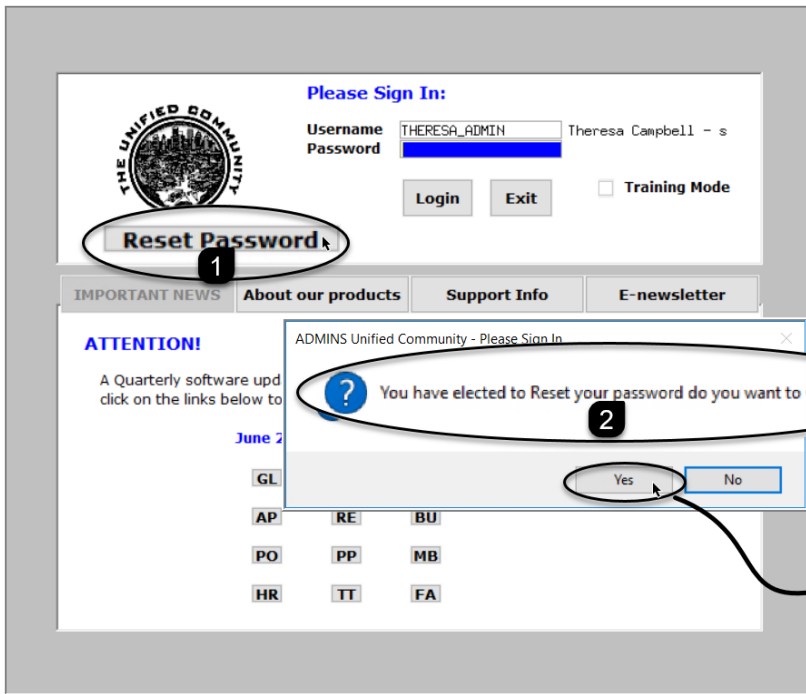


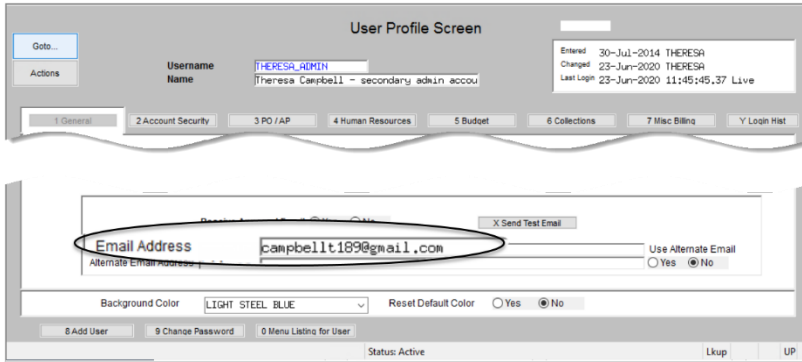
Figure 6 Before and After – the new Reset Password button on the login screen



Use this feature if the password is forgotten.

1. Click the **Reset Password** button to initiate setting a new password.
2. Click **[Yes]** to the “You have elected to Reset your password do you want to Continue?” prompt.

3. Click **[OK]** to the popup showing where the email has been sent.



The email will be sent to the email address on the contact tab of the user profile table. The prompt will show which email address will be used. Check the email account for the new password for **AUC**.

Figure 7 Set up email addresses for AUC users

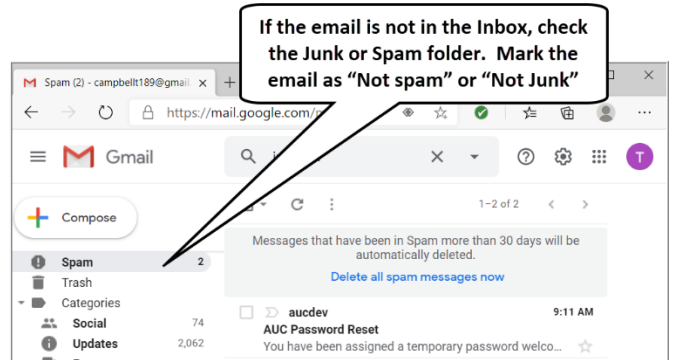
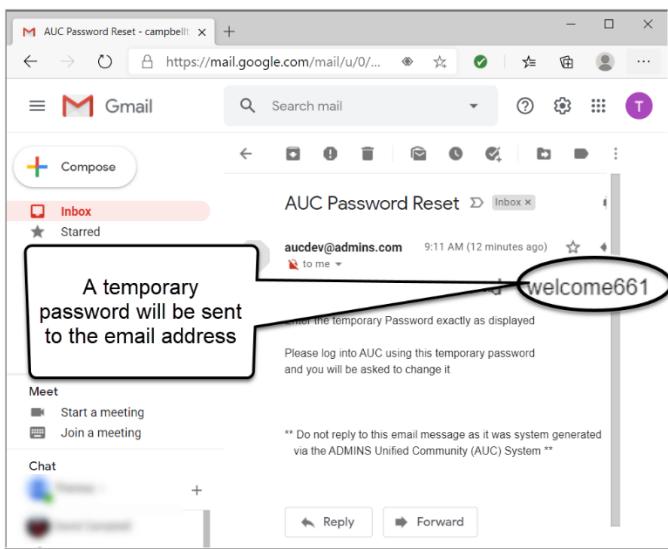
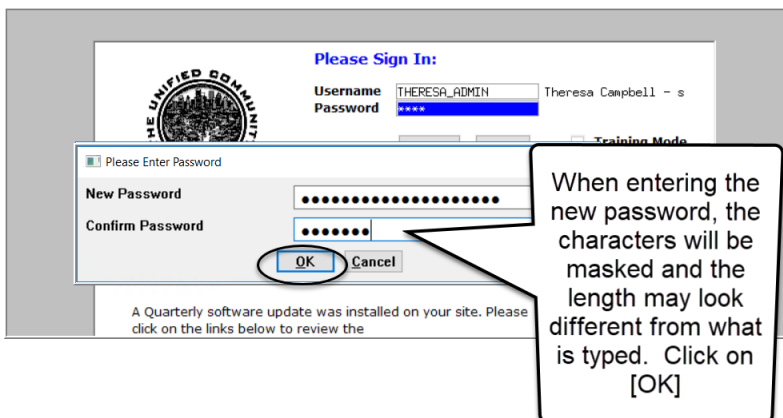


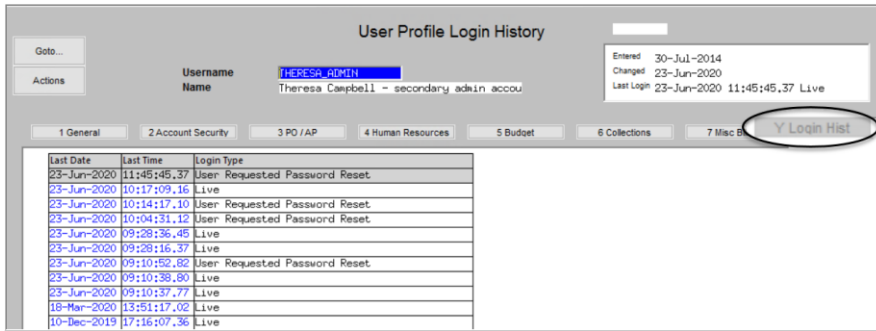
Figure 8 Sample email sent with temporary password



If the email is not found in the inbox, check the spam or junk folder. Use the password in the email exactly as shown (case sensitive). The system will immediately prompt for a new password.

Type a new password and confirm the new password.

Figure 9 Entering a new password

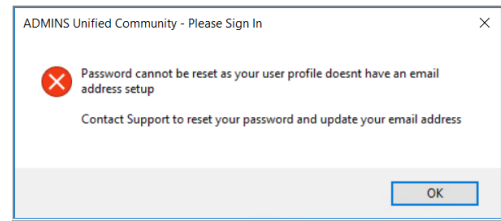


The super-user on the site may view the **User Profile** ► **[Y Login History]** tab to see logon and password reset activity.

Figure 10 Login History Screen for super-users

If the user profile does not have an email set up, the system will display this message. Contact the super user on your site or **ADMINS** to add an email address to the user profile.

If no email should be associated with the username, contact support@admins.com to reset the password.



[ADM-AUC-SY-8130]

4.1. New Message on Password Errors [Enhancement]

ADMINS changed the invalid password message to reflect the availability of the Reset Password button and to let users know that they may try again after five minutes.

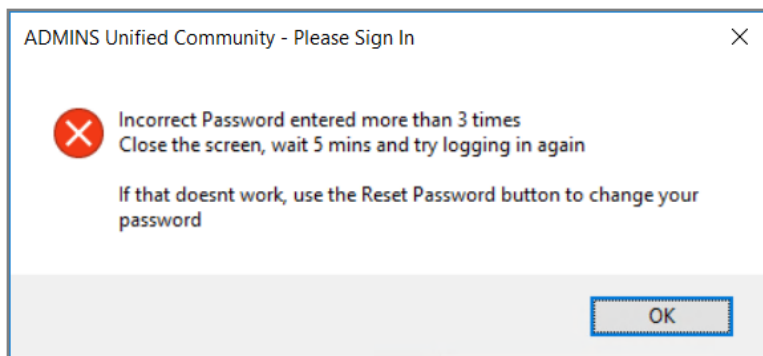


Figure 11 New Incorrect Password message

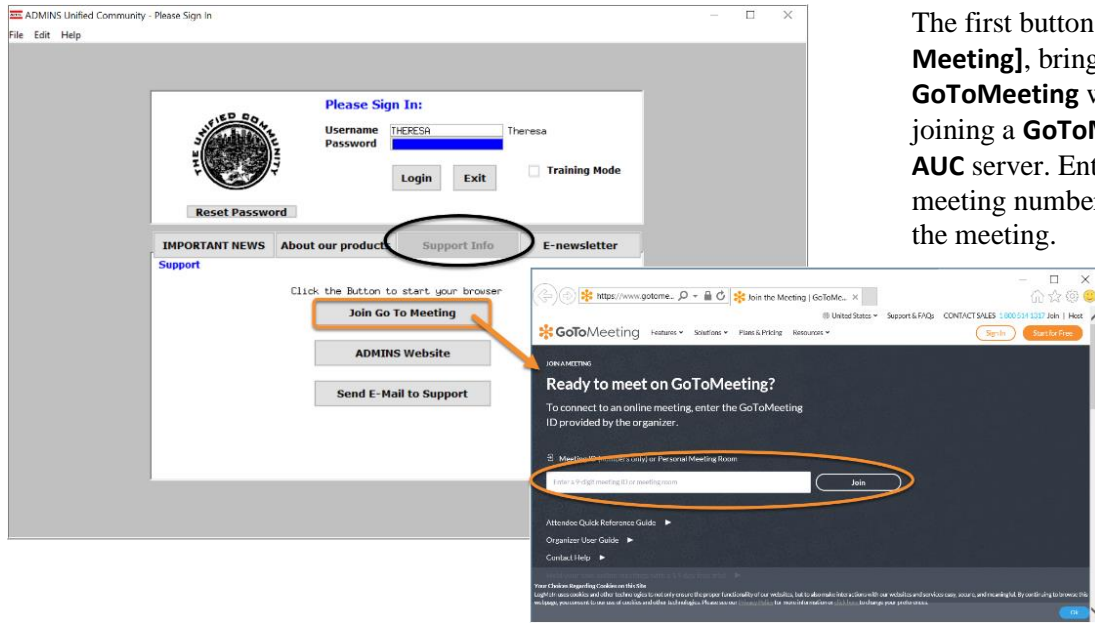
[ADM-AUC-SY-8159]

5. LOGIN SCREEN SUPPORT INFO TAB [Enhancement]

Many users only use this screen to log in – but there are other features available. Click on the **[Support Info]** tab. There are 3 buttons on this screen to easily join a **Go To Meeting**, access the **ADMINS** website or email **ADMINS** support.

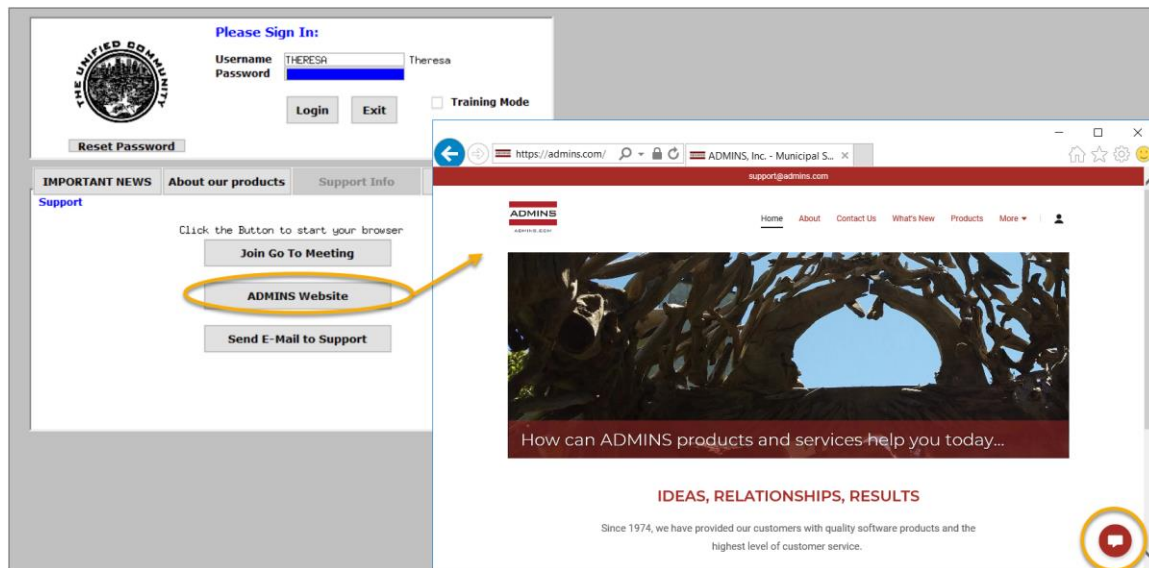


5.1. [Join Go To Meeting]



5.2. [ADMINS Website]

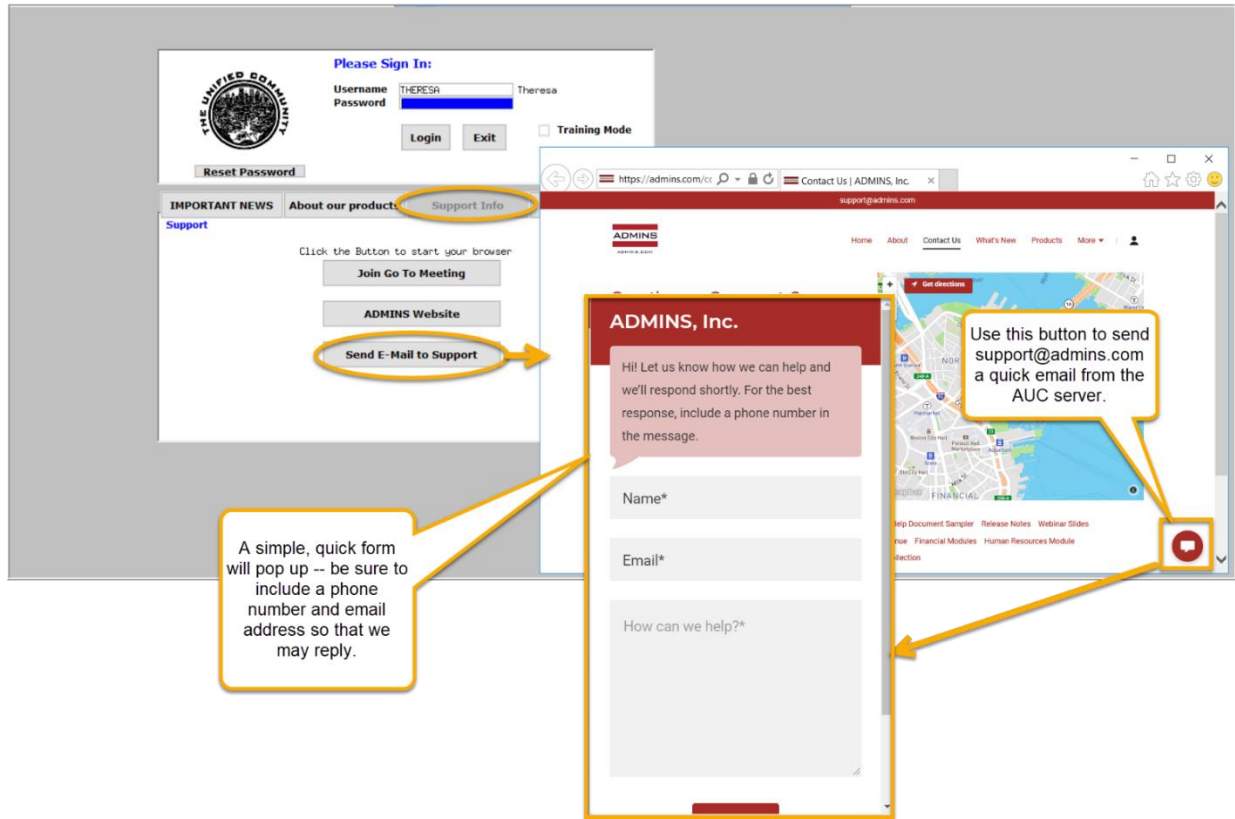
The second button will bring up the ADMINS website home screen. Access news, release notes, webinars, and selected help documents here.





5.3. [Send E-Mail to Support]

The third button opens the **ADMINS “Contact Us”** page to instantly send an email to **ADMINS** support. Every page on the website has the button to allow emailing support instantly.



[ADM-AUC-SY-8154]

6. HELP REFERENCE LIBRARY

In addition to the following new or updated documents added to the Help Reference Library, the **“SYSTEM”** sections of each library were standardized for the help documents that are not specific to the module. See the **“SYSTEM”** bullet below for an example.

6.1. New or Updated Documents

- -----TOP LEVEL----- RE-100 Property Tax Help Documents Index [Updated]
- SYSTEM SY-117 Quick Report Selector [New]
- SY-145 Reset Password [New]