

1. Create Primary

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

1.1. [2 Add Primary] 2Add Primary

Combined Parcel Table (Real F	Estate)
Goto Primary Parcel	
[line] [AUC] 5227-Combined Parcel Table (Real Estate) [the	eresa] ×
Add Primary Parcel List	
2 Add Primary Required: Enter Parcel# 0101 -0002 -0001	I
4 Edit List	
0 Combined Bits OK x	Cancel Clear All
Added By Changed by	Lkup TOF UP

The system will display a prompt for the **Primary Parcel** number. Select the parcel from a lookup of all parcels currently in Bill History or enter it into the field. Click **[OK]**.

Figure 1 Adding a Primary Parcel

A **Primary Parcel** ("parent" record) may have multiple linked parcels ("child" records). A **Primary Parcel** *cannot* appear as a linked parcel ("child" record) on another **Primary Parcel** list.

1.1.1. Information & Error Messages

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

When adding a new **Primary Parcel**, the system checks that the parcel 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 Parcel(s) to Primary Parcel

Actions	Primary Parce	el 0014	-0149	-0000	11 PLYMOUTH RD			
- CODE								
	Line# Parcel				Location	Current Owner	Button	
	0014	-0149	-0000		11 PLYMOUTH RD	COELHO, VICTOR & ANGELINA	5 Delete	
1 Add Line	0018	-0098	-0000		222 HARTFORD AV	STEEVES, THOMAS P		-1
-	0023	-0041	-0000		13 MONIQUE DR	STEEVES, THOMAS P		
	0029	-0110	-0000		49 MONIQUE DR	STEEVES, THOMAS P		
2 Add Primary	0030	-0041	-0000		16 CAROLINE DR	STEEVES, THOMAS P		
	6 0082	-0013	-0000		540 SOUTH MAIN ST	STEEVES, THOMAS P		-
2 Delete Primary	7 0089	-0033	-0001		1361 PULASKI BV 1361	STEEVES, THOMAS P		-
	8 🎍	-	-					-1
	9	-	-					-11
4 Edit List								-1
								-11
								-1
Combined Bills								-11
								-1
								-

Establish links by typing the parcel number directly on the screen. If the parcel number entered is found, and there is a current year bill for the parcel number, the system will populate the Owner Name and Address fields.

Figure 2 The Primary ("parent") parcel with several linked ("child") parcels

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

By default, the system provides five lines for linking parcels; 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 parcels to be linked appear in the screen.



1.2.1. Information & Error Messages

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

When entering the parcel 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 parcel list, the system will display an information box:

1.3. Deleting a Primary Parcel ^{3 Delete Primary}

To delete a primary parcel, it is not necessary to delete the linked parcels. 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 parcels for use on other combined lists.

		Combined Parcel Table (Real Estate)	
Goto				
Actions	Primary Parcel 0003 -003	-0000 266 FARM	ST	
	Line# Parcel	Location	Current Owner	Button
	1 0003 -003A -0000	266 FARM ST	LEMBO, RICHARD J	5 Delete
1 Add Line	2 0003 -003B -0000	262 FARM ST	TOGNACCI, ENRICO A JR + JUDY A	
	3 0003 -003E -0000	288 FARM ST	RESLOCK, JTLL A	
2 Add Primary 3 Delete Prim	4 0003 -003F -0001 5 0003 -003F -0002 	[AUC] 5227-Combined	l Parcel Table (Real Estate)	×
4 Edit List		? Are you sur	e you want to delete Primary List 0003 -	003A -0000
0 Combined Bills				
			Yes	No
Added 15-Jan-2020	0 By ANTHEA Changed by			Lkup

Figure 3 Deleting a Primary Parcel from the Combined Parcel Table

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

There are two methods to delete a *linked* (child) parcel; either click on the **[5 Delete]** button to remove the entire

	Combined Parcel Table (Real Estate)									
Goto										
Actions	Prin	nary Parce	el 0014	-0149	-0000	11 PLYMOUT	H RD			
	Line	# Parcel				Location	Current Owner	Button	^	
	1	0014	-0149	-0000		11 PLYMOUTH RD	COELHO, VICTOR & ANGELINA			
1 Add Line	2	0018	-0098	-0000		222 HARTFORD AV	STEEVES, THOMAS P			
	3	0023	-0041	-0000		13 MONIQUE DR	STEEVES, THOMAS P	5 Delete		
	4	0029	-0110	-0000		49 MONIQUE DR	STEEVES, THOMAS P	JUCICIC		
2 Add Primary	5	0030	-0041	-0000		16 CAROLINE IR	STEEVES, THOMAS P			
	6	0082	-0013	-0000		540 SOUTH MAIN ST	STEEVES, THOMAS P			
3 Delete Primary	7	0089	-0033	-0001		1361 PULASKI BV 1361	STEEVES, THOMAS P			
4 Edit List	E	+							=1	
	E	-								
O Combined Bills										
Added 24-Jan-2020	By THE	RESA Chan	ged 24-Jan-	2020 by THE	RESA				Lkup	

line or position the cursor in the **Parcel #** field and hit **{Spacebar}|{Enter}.**

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

Figure 4 Deleting linked parcel numbers from a primary parcel



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

🗶 🖬 🕫 - CH - 📼			Combine_Parcel_Table_5228_THERESA[1].xml - Microsoft Excel
File Home Insert Page Layout	Formulas Data Review	v View		
L43 🔫 🦳 🎜				
A	В	C D	E	F
1 Primary-Parcel	<u>_ocation</u>	Line Parcel	Location	Current-Owner
2 0003 -003A -0000		1 0003 -003A -0000		
3		2 0003 -003B -0000		
4		3 0003 -003E -0000		
5		4 0003 -003F -0001		
6		5 0003 -003F -0002		
7				
8 0004 -0028 -0000		1 0004 -0028 -0000		
9		1 0010 0015 0000		
10 0013 -0045 -0000		1 0013 -0045 -0000		
11		2 0013 -0046 -0000		
12		3 0013 -0047 -0000		
13		4 0013 -0048 -0000		
15 0014 0140 0000		1 0014 0140 0000		
15 0014 -0149 -0000		2 0018 0008 0000		
17		3 0023 0041 0000		
18		4 0029 -0110 -0000		
10		5 0030 -0041 -0000		
20		6 0082 -0013 -0000		
21		7 0089 -0033 -0001		
II I I Recombparedt / ℃				

Figure 5 Sample Edit List in Excel® format (names and addresses intentionally obscured)

1.5. Generate a Combined Bill Statement Combined Bills

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**.

ADMINS Unified Community Real Estate Tax

11 March 2020

Goto	Comb	pined Parcel T	^r able (Real Est	ate)							
Actions	Parcel 0003 -003A -0000	2	166 FARM ST								
Line# Par	rcel	Location		Current Owne	r	Button A					
1 Add Line 1 00 2 00 3 00	003 -003A -0000 103 -003B -0000 103 -003E -0000	131		1000		All link	ed parcel r	numbers	are a	vailab	ole
2 Add Primary 5 00	003 -003F -0001 003 -003F -0002				a manufacture	in the	lookup to	make it	easy t	o fino	d
3 Delete Primary	Task 5229: Combined Bill Statement (Real	al Estate)					the put	oor mann			
4 Edit List 0 Combined Bills	Combined Bill Statement (Rea Required: Enter Bill Year Required: Enter Primary Parcel# Required: Calculate Interest Thru (m Optional: Enter Email Address	I Estate) 2019 mddyyyy) 09-MAI	R-2020		Lookup	>					
	Optional: Enter Note 1		Combined Parcel	s		4					×
	Optional: Enter Note 2		Parcel	Lo	ocation	Current-Owner		Primary	-Parcel		Tof
Added 15-Jan-2020 By ANTHEA	Optional: Enter Note 3 Run as @ Preview O Print O PDI If Printing use Duplex @ Yes O P	F No	$\begin{array}{cccccccccccccccccccccccccccccccccccc$	-0000 -0000 -0001 -0001 -0002 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000		Primary Parcel number is shown here	}	0003 0003 0003 0003 0004 0013 0013 0013	-003A -003A -003A -003A -0028 -0045 -0045 -0045 -0045 -0149 -0045	-0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0000 -0007 -0007 -0007	~
Autor 15 Juli 2020 By ANTIER	changes by						OK Find	Search	Cancel	Help	Eof

Figure 6 The Combined Bills report – names and addresses intentionally obscured

Prompt (Required in Bold)	Description
Enter Commitment 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 Parcel #	Enter the "Primary" or "parent" parcel number – select it from the lookup ti 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 OPreview OPrint OPdf	This report should always be run as O PDF
If Printing use Duplex OYes ONo	The default varies from site to site and is set by the ADMINS installer

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

	Report Name	View	-	Report	Last Ru
Actions	5615-RE Mailing Address Labels	Sam	ple	Run	
	9660-PP Mailing Address Labels	Sam	ple	Run	
	5616-Tax Title/Deferral Mailing Address Labels	Sam	ple	Run	1
	4638-Transaction History for a Parcel	Sam	ple	Run	10-De
Report Categories	5959-Consolidated list of Bills per Taxpayer	Sam	ple	Run	24-Ja
1 Assessment Reports		Sam	ple		
2 Collection Admin	5229-Combined Bill Statement (Real Estat	e)	le	Run	
3 Deduction Reports	······································		le	Run	
4 Audit Reports					
5 TT / Deferral Reports					

	Benort Name	View	Re
Actions	4702-Bill Type - As of a Date	Sample	Ē
	4705-Balances as of (Trial Balance)	Sample	t
	4648-Projected Balances as of	Sample	Г
	4614-Parcel Outstanding Balance	Sample	Г
Report Categories	4708-Aged Receivables Report	Sample	Г
1 Collection Reports	4616-Outstanding Balance by Parcel for an Account	Sample	Г
2 Transaction Reports		Sample	Г
3 Other Reports	4532-Motor Excise Outstanding Balance Report	Sample	Г
4 TT / Deferral Reports	4533-Motor Excise - O/S Balance - Tax only	Sample	Г
	4645-ME Bills Fully Abated with Outstanding Fees	Sample	Г
have the	A say in the second second with a second	ي هوي السور	b
harmen fra	5229-Combined Bill Statement (Real Es	Suthue Sample state) ple	
	North Report	Suth-o	
hanna fa	Hroits menerate Report 5229-Combined Bill Statement (Real Es 8650-Combined Bill Statement (Motor Excise)	Sample Sample State > Sele Sample	

Figure 7 Combined Bill Statement available in report libraries

1.5.1. Report Layout





 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

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 The report layout – Header section– numbers below correspond to the numbers on Figure 8

 3. Owner of the primary parcel#

 4. Address of primary parcel owner

 5. What bill type is being combined

 6. What bill year was used

 7. Interest (if any) will be calculated through this date

Note: the detail section (#s 8 - 14) of the report will be in Bill# order

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

The address shown in #15 is set via Collections > Tables > Forms Text and Parameter > [2 Real Estate].

tio <u>n</u> s	Bill Year 2019 Bill Type 10 Real Estate	* = Required	
	1 General 2 Real Estate 3 Personal Property 4 M	Iotor Excise 5 Revenue Collection	
fit List	Department Title Collector Address line 1 * ADMINS Collector/Treasurer Address line 2 219 Lewis Wharf City, State & Zip * Boston, MA 02110		
	Header Line 2 Header Line 3 Footer Line 1 * Tax Collector, Town of ADMINS	For 3 part bill form Title on Stub 1 EQLIECTOR COPY	
	Fourier Line 2 k13 Lewis mmarr Footer Line 3 Boston, MA 02110 Seal Location Formsrpt:abc_seal.png SIG Location	Title on Stub 3 REMIT COPY	

Figure 9 The Collections ▶ Tables ▶ Forms Text and Parameter ▶ [2 Real Estate] tab

1.5.2. Email the Statement to Any Valid Email Address

Once the bills are grouped, run a report of all the Real Estate 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 O PDF**[®] to preserve the formatting appearance.



Figure 10 Sample Combined Parcel report may be printed or emailed