REAL ESTATE TAX BILLING

RELEASE NOTES – JUNE 2019

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

CONTENTS

1. QUERIES ▶ Bill Locator Screen ▶ Balance W/O Interest Message [Enhancement]

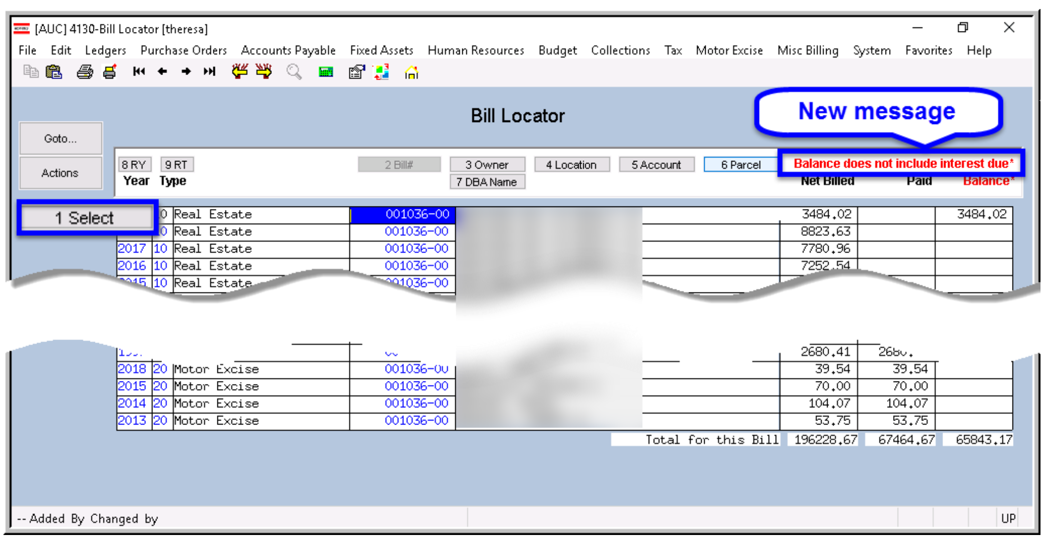


Figure 1 The Bill Locator screen balance column does not include interest due

The **Bill Locator** screen provides a rapid way to retrieve a bill and includes a **Balance** column. **ADMINS** added a message to the screen as a reminder that the balance shown on this screen ***does not*** include interest due. Select **Collections ▶ Queries ▶ Bill Locator** to view this change.

Drill down to the bill using the **[1 Select]** button for complete information, including interest as of a specified date.

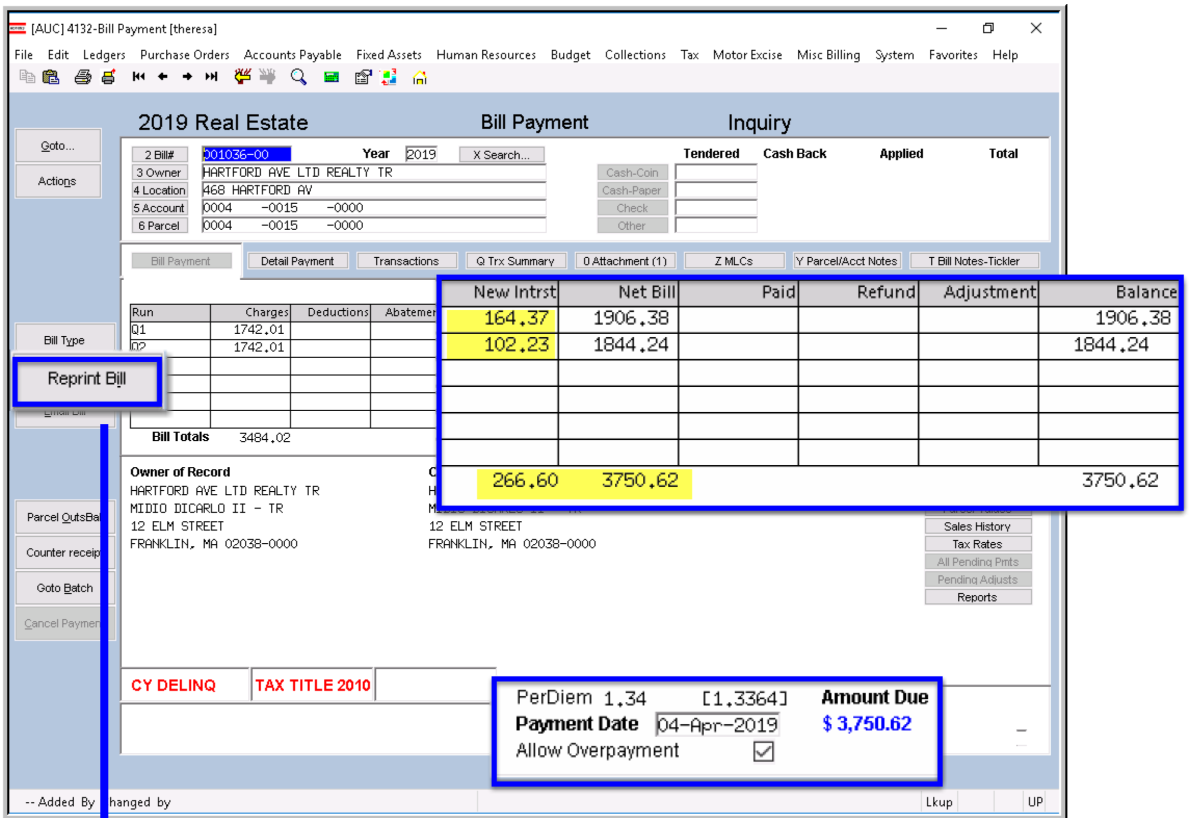


Figure 2 The Bill Query screen shows the detail, including interest due

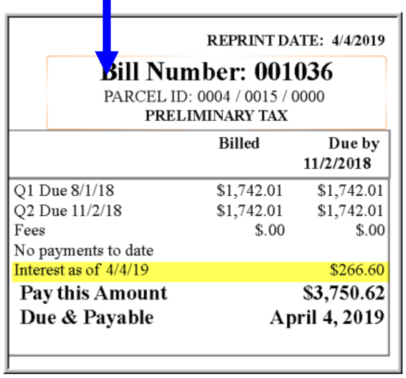


Figure 3 Excerpt from a bill reprint

The excerpt from a bill reprint in Figure 3 also shows the interest as of a date.

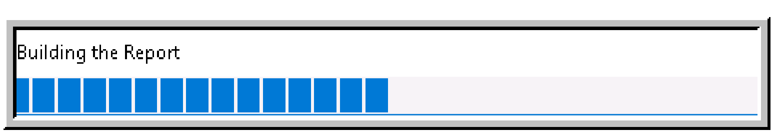
Bill reprints and information provided from the bill query screen are the preferred method for providing responses to inquiries. In this example, the interest of **$266.50** added to the tax balance of **$3,484.02** for a total of **$3,750.62**.

[ADM-AUC-RC-8420]

2. REPORTS

ADMINS reinstated the reports progress bar, offers a tip on soliciting help from support and enhanced a report.

2.1. Progress Bar



ADMINS reinstated the progress bar feature that indicates a report is running.

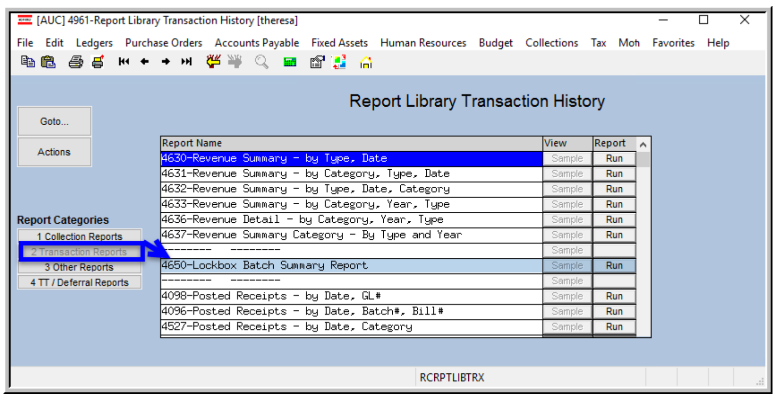
[ADM-AUC-SY-8093]

2.2. Email Reports [Tip]

The support team frequently receives emails containing ***scanned*** images of **ADMINS** reports (we love pictures!). Any **ADMINS** report may be emailed via the **Reports ▶ Retrieve Output** function. This saves time and paper (no need for printing) and ensures accuracy when sending reports spanning multiple pages to *support@admins.com*. There is a document, **RE–720 I forgot to print my reports**, that gives instructions on how to use the **Reports ▶ Retrieve Output Files** feature to email reports.

[ADM-AUC-DOC-166]

2.3. #4650 Lockbox Summary Report [Enhancement]



ADMINS added totalling options to the Lockbox Batch Summary Report. Run the report by selecting **Collections ▶ Reports ▶ Report Library ▶ [2 Transaction Reports] ▶ #4650 Lockbox Summary Report**.

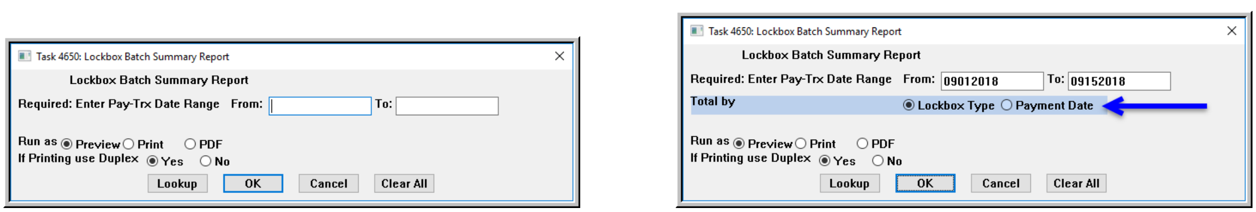


Figure 4 Before and After– Lockbox Summary Report prompt –added a "Total by" selection radio button

If **Total by ⦿ Lockbox Type** is selected, all dates within the specified range for a lockbox type will be listed and a total at the end of each lockbox type will be provided.

In the example in **Figure 5** are multiple dates for a single lockbox type:

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Town of Admins
Lockbox Batch Summary Report

Pay-Trx Dates From 09032018 to 09122018

Batch #	Description	Pay-Trx Date	Deposit Date	Real Estate	Personal Property	Motor Excise	Other	Total
LRC0904424	BILL TRUST PAYMENTS	04-Sep-2018	04-Sep-2018	4,447.12				4,447.12
	Total BILL TRUST PAYMENTS			4,447.12				4,447.12
LRC0927451	MV - DEPUTY (KELLEY &	04-Sep-2018	27-Sep-2018			5,327.88		5,327.88
LRC0927451	MV - DEPUTY (KELLEY &	05-Sep-2018	27-Sep-2018			1,018.41		1,018.41
LRC0927451	MV - DEPUTY (KELLEY &	06-Sep-2018	27-Sep-2018			1,704.93		1,704.93
LRC0927451	MV - DEPUTY (KELLEY &	07-Sep-2018	27-Sep-2018			2,145.86		2,145.86
LRC1004473	MV - DEPUTY (KELLEY &	10-Sep-2018	04-Oct-2018			1,662.56		1,662.56
LRC1004473	MV - DEPUTY (KELLEY &	11-Sep-2018	04-Oct-2018			479.91		479.91
LRC1004473	MV - DEPUTY (KELLEY &	12-Sep-2018	04-Oct-2018			1,441.37		1,441.37
	Total MV - DEPUTY (KELLEY &					13,780.92		13,780.92
LRC0903423	MV - UNIBANK	03-Sep-2018	03-Sep-2018			100.83		100.83
LRC0904425	MV - UNIBANK	04-Sep-2018	04-Sep-2018			40.83		40.83
LRC0909433	MV - UNIBANK	09-Sep-2018	09-Sep-2018			82.50		82.50
	Total MV - UNIBANK					224.16		224.16
LRC0904426	TAX - CITIZENS	04-Sep-2018	04-Sep-2018		130.57			130.57
LRC0904427	TAX - CITIZENS	04-Sep-2018	04-Sep-2018			184.89		184.89
LRC0906430	TAX - CITIZENS	06-Sep-2018	06-Sep-2018			30.00		30.00
LRC0907431	TAX - CITIZENS	07-Sep-2018	07-Sep-2018	1,228.94		67.50		1,296.44
LRC0912434	TAX - CITIZENS	12-Sep-2018	12-Sep-2018			61.67		61.67
LRC0912435	TAX - CITIZENS	12-Sep-2018	12-Sep-2018	810.01		37.92		847.93
	Total TAX - CITIZENS			2,038.95	130.57	381.98		2,551.50
LRC0905429	TAX - UNIBANK	05-Sep-2018	05-Sep-2018	969.55				969.55
LRC0909432	TAX - UNIBANK	09-Sep-2018	09-Sep-2018	542.08				542.08
	Total TAX - UNIBANK			1,511.63				1,511.63
** Grand Total **				7,997.70	130.57	14,387.06		22,515.33

Figure 5 – Lockbox Summary Report with totals for each lockbox type

If **Total by ⦿ Payment Date** is selected, this will sort the report by payment date and give a lockbox type total on change of date. The activity for the **TAX-CITIZENS** type is highlighted in **Figure 6**.

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Town of Admins
Lockbox Batch Summary Report

Pay-Trx Dates From 07012018 to 06302019

Batch #	Description	Pay-Trx Date	Deposit Date	Real Estate	Personal Property	Motor Excise	Other	Total
LRC0802340	MV - DEPUTY (KELLEY &	09-Jul-2018	02-Aug-2018			1,265.99		1,265.99
	Total MV - DEPUTY (KELLEY &					1,265.99		1,265.99
LRC0709242	MV - UNIBANK	09-Jul-2018	09-Jul-2018			2,452.10		2,452.10
	Total MV - UNIBANK					2,452.10		2,452.10
LRC0709244	TAX - CITIZENS	09-Jul-2018	09-Jul-2018	17,039.09	91.39			17,130.48
LRC0709245	TAX - CITIZENS	09-Jul-2018	09-Jul-2018	2,058.62				2,058.62
LRC0709246	TAX - CITIZENS	09-Jul-2018	09-Jul-2018	49,548.93	74.01			49,622.94
LRC0709247	TAX - CITIZENS	09-Jul-2018	09-Jul-2018			2,395.74		2,395.74
LRC0709248	TAX - CITIZENS	09-Jul-2018	09-Jul-2018	75.55				75.55
LRC0709249	TAX - CITIZENS	09-Jul-2018	09-Jul-2018			2,346.06		2,346.06
LRC0709250	TAX - CITIZENS	09-Jul-2018	09-Jul-2018	46,821.97	321.20			47,143.17
	Total TAX - CITIZENS			115,544.16	486.60	4,741.80		120,772.56
LRC0709243	TAX - UNIBANK	09-Jul-2018	09-Jul-2018	5,712.04	912.39			6,624.43
	Total TAX - UNIBANK			5,712.04	912.39			6,624.43
LRC0710251	TAX - CITIZENS	10-Jul-2018	10-Jul-2018	1,459.73				1,459.73
LRC0710252	TAX - CITIZENS	10-Jul-2018	10-Jul-2018	4,208.08				4,208.08
	Total TAX - CITIZENS			5,667.81				5,667.81

The legend at the bottom of the last page of the report will indicate which way the report was run; either by Payment/Trx Date or by Lockbox Type.

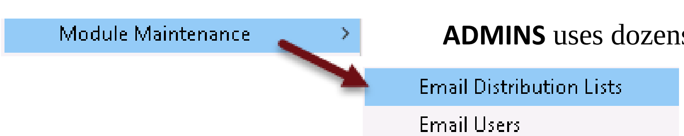
Selection Legend:
Total by Payment/Trx Date

Selection Legend:
Total by Lockbox Type

Figure 6 Lock Box summary report with Total by ⦿ Payment Date selected

[BLG-SUP-SAPLAUC-1201]

3. DISTRIBUTION LIST EMAILS [Enhancement]



ADMINS uses dozens of distribution lists to notify designated users of a variety of system events. The lists are set up in the **Module Maintenance ▶ Email Distribution Lists** for each Module.

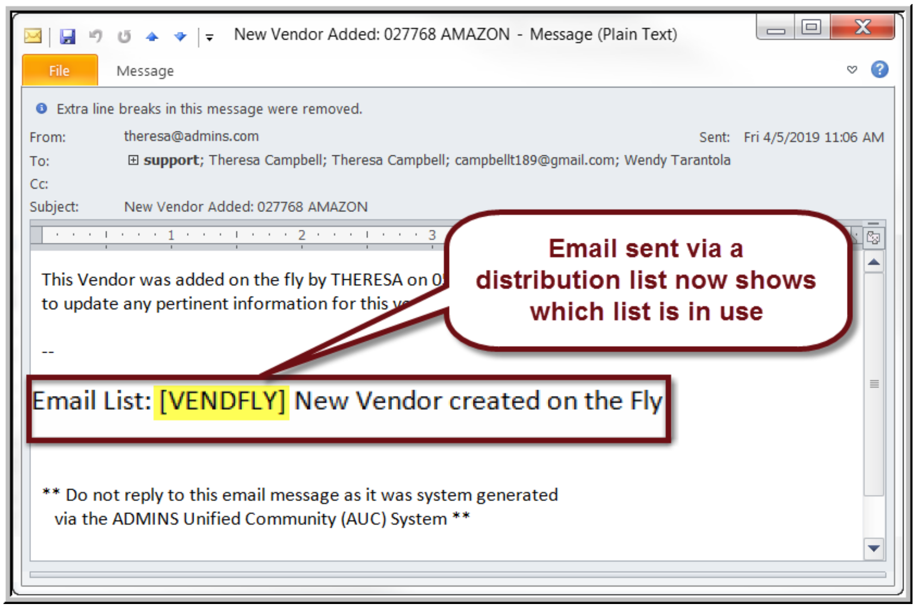


Figure 7 System generated email identifies the Email List [Name] & Description

The **Email List Name** and **Description** is now included in the body of the email to identify the origin of the email. This will help when users are receiving emails but are not sure where the email originates or why a particular user is receiving the email. In Figure 7, the **Email Distribution List** named **"VENDFLY"** was used by the system to notify users that a new vendor was created.

If the distribution needs to change, the list may be edited. Detailed instructions are available in the Help Reference Library for each module, for example, **RE–740 Email Distribution Lists**.

[ADM-AUC-SY-8102]

4. EXCEL® TEMPLATES [Fix]

ADMINS provides **Excel®** spreadsheets used for a variety of upload purposes. Prior to the software update, when accessing a template, if a user tried to open a second copy of the template, the process terminated, bringing the user to the support page.

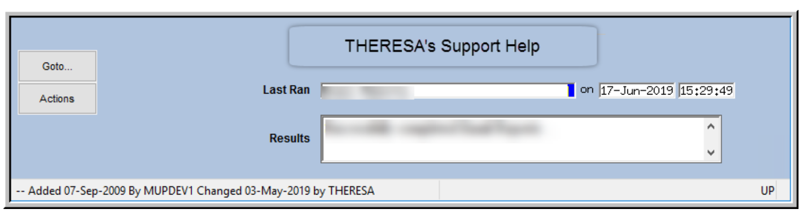
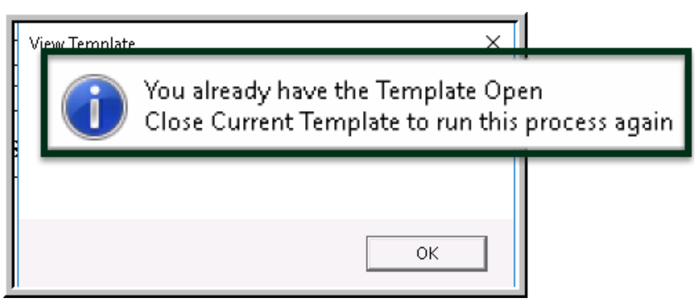


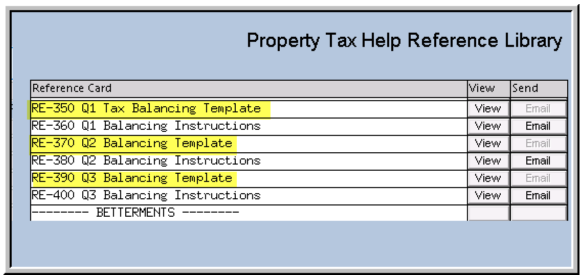
Figure 8 Before – if the template was already open, process brought the user to the support page



This was corrected and users will instead be informed that the template is already open.

Figure 9 After – message instructing the user to close the open template prior to running the process again

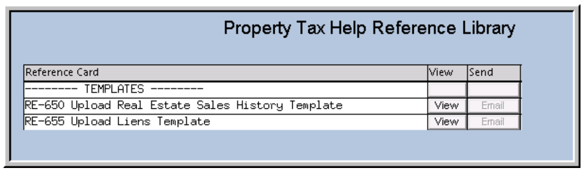
Changes affected these templates available by selecting **Tax ▸ Help Reference Library ▸ Billing**:



RE–350 Q1 Tax Balancing Template
RE–370 Q2 Balancing Template
RE–390 Q3 Balancing Template

Figure 10 Real Estate Balancing Templates

Other templates affected by this change are available by selecting **Tax ▸ Help Reference Library ▸ Templates**:



RE–650 Upload Real Estate Sales History Template
RE–655 Upload Liens Template

Figure 11

[TOC-SUP-SAPLAUC-2966]

5. HELP REFERENCE LIBRARY

5.1. New or Updated Documents

• BILLING	RE–350 Q1 Tax Balancing Template	[Updated]
	RE–370 Q2 Balancing Template	[Updated]
	RE–390 Q3 Balancing Template	[Updated]
• TEMPLATES	RE–650 Upload Real Estate Sales History Template	[Updated]
	RE–655 Upload Liens Template	[Updated]
• OTHER	RE–715 Favorites Screen	[Updated]
	RE–720 I forgot to print my reports	[Updated]
• SYSTEM	RE–770 System Administration Kit	[Updated]