



# REAL ESTATE TAX BILLING

## RELEASE NOTES

March 2023

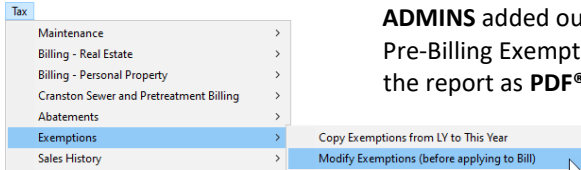
This document explains new product enhancements added to the **ADMINS Unified Community (AUC) REAL ESTATE TAX** system.

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# 1 Report #5186 Exemptions Pre-Billing Edit List [Enhancement]



ADMINS added output options to report # 5186, the Edit List that is available from the Pre-Billing Exemptions screen. Before the software update, there was no option to Run the report as PDF® or Excel®.

To run the edit list, from the menu, select:

Tax ▶ Exemptions ▶ Modify Exemptions (before applying to Bill)

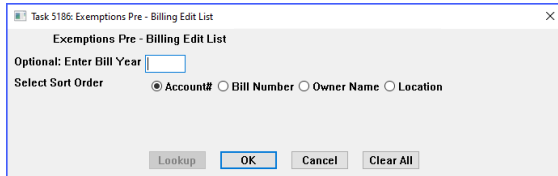


Figure 1 Before - there were no "Run as" options

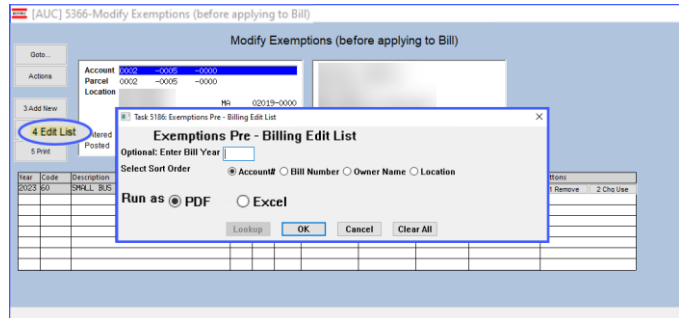


Figure 2 After – the Edit List is available to be run as PDF® or Excel®

Year	Code	Account#	Bill#	Owner	Location	UseCd	DeductionAmt	DeductionAmt	Difference	
2023	60	0098-0012-0000	006536-00			0325	1,829.49	1,829.49		
2023	60	0098-0134-0000	006649-00			0325	354.11	354.11		
2023	60	0098-0136-0000	006651-00			0325	355.30	355.30		
2023	60	0098-0149-0000	006663-00			0332	366.86	366.86		
2023	60	0098-0002-0000	006528-00			0332	385.13	385.13		
2023	60	0098-0045-0000	006569-00			0326	275.67	275.67		
2023	60	0098-037A-0000	006709-00			0340	837.94	837.94		
2023	60	0098-045A-0000	006711-00			0337	177.31	177.31		
Total SMALL BUS EXEMPTION						#Recs	85	68,547.91	68,547.91	
2023	99	0039-0040-0000	002812-00			0452	10,092.62	10,092.62		
Total ADMIN ADJUSTMENT						#Recs	1	10,092.62	10,092.62	
Total Bill Year 2023						#Recs	288	234,491.15	234,491.15	
*** Grand Total ***						#Recs	288	234,491.15	234,491.15	

Selection Legend:  
Year: 2023  
Sorted By: Account

Figure 3 The Pre-Billing Exemptions Edit List Run as Excel®

Being able to run the report as Excel® allows filtering, searching, and adding columns if calculations are needed.

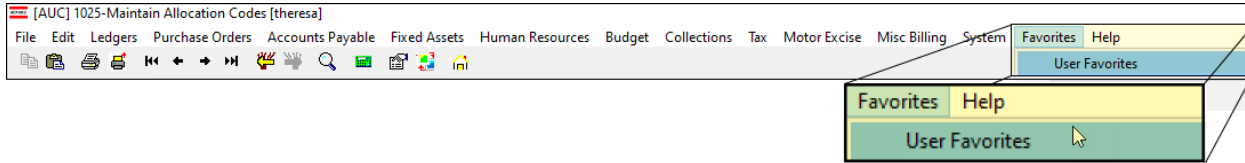
[ADM-AUC-RE-5658]



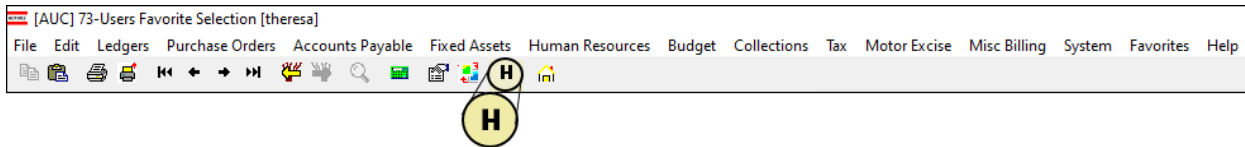
## 2 Favorites Screen [Enhancement]


ADMINS added a button on the **Favorites** screen to set it as your home screen so that when you click on the home button in the toolbar, you will return to the Favorites screen. To access the **Favorites** screen, from the menu, select:

**Favorites ▶ User Favorites**



Once you are on the favorites screen, there will be an **[H]** icon next to the home button. If you want to make the **Favorites** screen your home screen, click on the **[H]** icon. If you want to retain your current home screen, do not click on the **[H]** icon. If you click on the **[H]** icon and change your mind, ask your local super user or [support@admins.com](mailto:support@admins.com) to reset your home screen.



From anywhere in the AUC system, click on the **[Home]** button  to return to your home screen. If you have clicked on the **[H]** icon, the **Favorites** screen is now your home screen.

[ADM-AUC-SY-8278]

### 2.1 Workshop

To get started with the favorites screen, **ADMINS** is hosting an interactive workshop, and everyone is invited. Sign up by replying to the email invitation that will be sent out on March 6th, 2023. If you want to participate, include a list of the screens and reports you use most when you accept the invitation. The workshop will be held on Thursday, March 23, 2023, from 2:00 PM - 2:30 PM.

To join us, accept the invitation in the email and mark your calendars.

[ADM-AUC-SY-8278]


### 2.2 Favorites Video Available Now


The [Favorites](#) video is a 2 ½ minute look at how the favorites screen works. Access it and scores of other [Videos & Quick Tips \(admins.com\)](#) from the **ADMINS** website.



## 2.3 ADMINS Video Library

Don't forget to check out all these other [Videos & Quick Tips \(admins.com\)](#). These videos are a valuable resource for a first look at many of the features available in **ADMINS**, as well as a refresher for “once in a while” tasks. The videos provide “just-in-time” training when new staff is coming aboard as well.



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### AUC Video Launchpad

Below is a list of training videos for new users to get acquainted with AUC, and for current users to take a deeper dive into a process or get a refresher for "once a year" tasks.

<h4 style="color: #8B4513;">Getting Started</h4> <ul style="list-style-type: none"> <li><a href="#">Logging In to AUC &amp; Basics</a> (7:00)</li> <li><a href="#">Logging out of AUC</a> (1:54)</li> <li><a href="#">Reset AUC Password</a> (2:00)</li> <li><a href="#">Use the Training Area</a> (2:04)</li> <li><a href="#">Clear Data From A Field</a> (1:17)</li> <li><a href="#">Favorites Screen</a> (2:23)</li> <li><a href="#">Index Of Help Documents</a> (0:51)</li> <li><a href="#">Reprinting A Report</a> (4:20)</li> <li><a href="#">Optimize the PDF Viewer</a> (3:37)</li> <li><a href="#">Email Signatures</a> (1:36)</li> <li><a href="#">Quick Task &amp; Report Button</a> (2:12)</li> <li><a href="#">Check for Record Locks</a> (2:14)</li> </ul>	<h4 style="color: #8B4513;">GL Training</h4> <ul style="list-style-type: none"> <li><a href="#">Add a New GL Account</a> (4:07)</li> <li><a href="#">Budget Transfers via a JE</a> (2:55)</li> <li><a href="#">Drill Down on Account</a> (4:51)</li> <li><a href="#">Transaction History Queries</a> (7:07)</li> <li><a href="#">General Ledger Reports</a> (10:09)</li> <li><a href="#">Expenditure Summary Report</a> (4:04)</li> <li><a href="#">Set Up A New Fund</a> (9:17)</li> <li><a href="#">Automate Reports using Job Stream</a> (24:28)</li> <li><a href="#">How to Upload a Journal Entry</a> (5:57)</li> <li><a href="#">How to Reverse a Journal Entry</a> (4:08)</li> <li><a href="#">Fixed Assets Module</a> (1 hour 21 minutes)</li> <li><a href="#">User Account Security</a> (6:32)</li> <li><a href="#">Budget Transfers via a Journal Entry (HVMA)</a> (3:00)</li> </ul>	<h4 style="color: #8B4513;">AP/PO Training</h4> <ul style="list-style-type: none"> <li><a href="#">Approvals - The AP/PO Dashboard</a> (3:49)</li> <li><a href="#">Purchase Order Entry</a> (7:28)</li> <li><a href="#">Reprint Purchase Order</a> (3:17)</li> <li><a href="#">PO Change Orders</a> (5:43)</li> <li><a href="#">Request A PO Liquidation</a> (2:34)</li> <li><a href="#">Liquidate a PO</a> (3:11)</li> <li><a href="#">Create a Direct Payment Voucher</a> (5:35)</li> <li><a href="#">Create a Voucher from a PO</a> (6:20)</li> <li><a href="#">Voucher Change Orders</a> (4:22)</li> <li><a href="#">Liquidate a Voucher</a> (4:16)</li> <li><a href="#">PO Queries</a> (7:14)</li> <li><a href="#">PO &amp; Voucher Reports</a> (2:47)</li> <li><a href="#">Querying Vouchers</a> (5:29)</li> <li><a href="#">Add a New Vendor</a> (2:54)</li> <li><a href="#">Vendor Attachments</a> (2:50)</li> <li><a href="#">Add a Vendor Remit Address</a> (3:20)</li> <li><a href="#">Voucher Selection Error Report</a> (2:59)</li> <li><a href="#">AP Disbursement Process</a> (10:45)</li> </ul>
<h4 style="color: #8B4513;">Collections &amp; Tax</h4> <ul style="list-style-type: none"> <li><a href="#">Enter Bill Payment Receipts</a> (7:14)</li> <li><a href="#">Enter Treasury/ Departmental Receipts</a> (10:57)</li> <li><a href="#">Reprint a Bill</a> (4:01)</li> <li><a href="#">Bill Inquiry Screen</a> (7:26)</li> <li><a href="#">Bill Locator Screen</a> (3:30)</li> </ul>	<h4 style="color: #8B4513;">HR Training</h4> <ul style="list-style-type: none"> <li><a href="#">Create A Payroll Warrant</a> (3:31)</li> <li><a href="#">Timesheet Entry</a> (7:34)</li> <li><a href="#">How To "Uncalculate" A Warrant</a> (2:14)</li> <li><a href="#">Create A Recon File After Warrant Is Posted</a> (1:10)</li> <li><a href="#">Add Historical Salary Change Record</a> (2:47)</li> </ul>	<h4 style="color: #8B4513;">Webinar Links</h4> <ul style="list-style-type: none"> <li><b>Fiscal Year End</b></li> <li><a href="#">PO Rollovers</a> (24:31)</li> <li><a href="#">Split Labor Distribution</a> (21:18)</li> <li><b>Calendar Year End</b></li> <li><a href="#">AP 1099 Processing (G, Int, MISC, NEC, S)</a> (26:21)</li> <li><a href="#">HR W2 Processing</a> (28:01)</li> </ul>

We are adding content all the time so check back often; we also send out a “Featured Video of the Month” email.