

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

Contents

1.	. WHO IS LOCKING A RECORD ON THE UPDATE SCREEN? [NEW]	2
2.	. OWNER OF RECORD MAILING ADDRESS UPDATES [ENHANCEMENT]	2
з.	. [4 COPY DEED] BUTTON ADDED [ENHANCEMENT]	4
4.	FROZEN SCREEN?	5
5.	HELP REFERENCE LIBRARY	6
	5.1. New or Updated Documents	



This symbol indicates that there is an updated document with significant information in the Help Reference Library. Be sure to review the updated and new documents referenced herein.

Anytime this little gal appears in release notes, it means that one of our customers was asking for an enhancement; she will point out those new features.



1. WHO IS LOCKING A RECORD ON THE UPDATE SCREEN? [New]

ADMINS is pleased to announce a new feature that will identify who you are record-locked with on a new record-locking screen. When a record-lock occurs, a popup screen will appear as shown in Figure 1. Click on **[OK]**.



Figure 1 Popup notification that a record is locked

User: theresa

TOWN theresa@admins.com

Phone: (617) 494-5100

Once the screen is available, click on

the [Return to Previous Screen] button

Department:

Email:

🚃 Record Lock [theresa_admin]

1 The

screen

that is locked is

identified

here

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File Edit Help

1. The system will display a new screen providing information needed to contact the user who is locking the record. The screen name will be supplied. See Figure 2.

- 2. Contact the user locking the record to ask them to exit the screen.
- 3. Click on the **[Return to Previous Screen]** button to return to the same record that was previously locked.

 If the user cannot be contacted to exit the record, proceed to another

task by clicking on the ([Home] button). From the home screen, use the menu to select another task.



Detailed information and examples are available in the new document, <u>RE–705 Locking</u> Screen.

Figure 2-New screen with information about who is locking a record and how to contact them

ADMINS UNIFIED COMMUNITY [AUC]

Theresa

1 Return to Previous Screen

2123

Locked on Screen: Employee Maintenance

You have encountered a Record Lock on the screen you were trying to access. The user you were locked with information is below

[ADM-AUC-SY-8063]

2. OWNER OF RECORD MAILING ADDRESS UPDATES [Enhancement]

Information from

the user's profile

easier to contact this user to request access to the

screen will be displayed, making it

locked record.

The Set Owner of Record as of Jan 1 process is run prior to the Real Estate Billing to ensure that the correct owner of record is shown on the billing files, printed bills and screens. ADMINS extended the features of this process to allow an optional Transfer Date Range. This will stop any *"out of range"* deed records from updating the owner of record files. Select Tax ▶ Billing – Real Estate ▶ Set Owner of Record as of Jan 1 to use this feature.





Using the new prompt, the **Set Owner of Record as of January 1** is run *with a date range*, to prevent mailing address updates from being over-written by the process.

Task 5100: Set Owner of Record as of Jan 1							
Set Owner of Record as of Jan 1							
Required: Enter Year: Set OOR as of Jan 1,							
Required: For Billing Year							
Run as) Preview) Print							
Lookup OK Cancel Clear All							

Task 5100: Set Owner of Record as of Jan 1	^
Set Owner of Record as of Jan 1	
Required: Enter Year: Set OOR as of Jan 1, 2018	
Required: For Billing Year 2019	
Optional: Transfers Dated (mmddyyyy) From: 01012018 To: 12312018]
Run as Preview Print PDF If Printing use Duplex Yes No Lookup OK Cancel Clear All	

Figure 3 Before–Only the YEAR fields were available

Figure 4 After with the Optional Date Range fields

To illustrate, a mailing address change is made on a parcel here; **no new deed** is entered; **only the mailing address** is changed:

	Real Estate Owner Update	OWNER OF RECORD			Re	eal Estate Owner Update	OWNER OF RECORD
Account 0003 -0001 -0001 Owner OLEARY, LISA M Location 248 FARM ST City BELLINGHAM	State MA Zipcode 02019-0000	OOR as of: 01-Jan-2018 OOR Set on: 06-Jan-2018 Set by: Mass Update	Acce Own Loca City	ount 0003 her OLEARY, L' ation 248 FARM : BELLINGHA	0001 -0001 ISA M ST M	State MA Zipcode 02019-0000	OOR as of: 01-Jan-2018 Changed on: 08-Sep-2018 Changed by
Sort DEPATY, LISA M Address 1 246 FKAH ST Address 2 Address 3 Address 4 Address 4 Address 5 Zip Codo 7 Zip Codo 7 Zip Codo 7 County Email Address Postal Bar Codo 0 Edit Nete	State PA	Date 15-Oct-2017 Type 15-Oct-2017 Amount 15 15:00:00 Mailing address as shown on current deed	Ai Ai Ai Ai Ai Ai Ai Ai Ai Ai Ai Ai Ai A	ort 2014 ddress 1 2014 ddress 3 2014 ddress 3 2014 ddress 4 2014 ddress 4 2014 ddress 5 2014 ddress 5 2014 iii pi Code 2014 mail Address ostal Bar Code DEdt Note 2014	LLARY, LTSH M 5 HILSIRE WHY 2110-0000 03101	State 1/4	Date 16-Oct-2017 Type H COLAR (REER Amount 8 Oct 2017) Amount 9 H COLAR (REER H COLAR (REER)) (REER H COLAR (REER (REER)) (REER H COLAR (REER

Figure 5 Update a mailing address without a new deed

In the example above, on September 6, 2018, the *mailing address* for this owner is changed from **248 FARM ST** to **75 WILSHIRE WAY**. The zip code and city are also changed.

	Real Estate Owner Update OWNER OF R	ECORD
Account 0003 -0001 -0001 Owner OLEARY, LISA M Location 248 FARM ST City BELLINGHAM	OOR as of: 01-Jar OOR Set on: 06-S State MA Zipcode 02	n-2018 ep-2018 ate
Owner Class D Address Sequence 1 of 1	Owner Type Address Type	
First Middle	Book 35520 Page 387 Document# 837 Land Cent# Bank Bank E-Oct-Oct 00,000 E-Oct-Oct Document# State	2017 LIRT ORDER

After the process is run to update the **OOR**, the owner record mailing address information is retained as **75 WILSHIRE WAY**. The record shows that the update was run on 06-Sep-2018.

If *no date range is entered*, the **OOR** mailing address would be updated with the mailing address from the January 1 sales history deed record. Verify the data on the pre-posting report prior to completing this command.

If a mailing address is updated on the owner screens, and the **Set Owner of Record (OOR) as of Jan 1** is run *without a date range*, the data from the deed on or before January 1 of the specified year will over-write the mailing address. To prevent that, use the date range to allow only changes made within the transfer date range to be written to the Owner of Record screen.

[ADM-AUC-RE-5,571]

ADMINS Unified Community Real Estate Tax

3. [4 COPY DEED] BUTTON ADDED [Enhancement]

A **[4 Copy Deed]** button was added to the **Real Estate Sales History** screen to copy a selected deed. This button creates a new record with all of the information from the existing record. The new record, shown in **Figure 6** as inserted at the top of the screen with a date of 09-Sep-2017, will update the **Current Owner** screen with any changes made to the sales history screen.



Select Tax > Maintenance > Real Estate Sales History to access the screen.







Figure 7 The Current Owner screen shows the updates

- 1. The 10 Nov 2013 deed is selected by clicking on the row.
- 2. Click on the **[4 Copy Deed]** button to invoke a prompt for the new date.
- 3. A popup box will be displayed **requiring** that a **Transfer Date** be entered. The *same date may be used* for this record or another date may be entered.
- 4. The record is replicated for the deed with a new sequence number. A name change may be entered; other changes are allowed.
- To view the changes on the Owner Update screen, click on [X Owner].
- When exiting the record a message box appears with a notice that the Current Owner will be updated. Click on [OK].
- 1. On the Real Estate Owner Update Screen, the CURRENT OWNER reflects the change made on the Sales History screen.
- 2. The **Name** and **Sort Name** are updated
- 3. A **Secondary Name** was added on the screen shown in **Figure 6**; that change is also reflected on the **CURRENT OWNER** screen.

Release Notes – Version 18.3 September 2018

ADMINS Unified Community Real Estate Tax



Exercise care when selecting the deed record to be copied and entering a date for the new record. If a record exists for the transfer date, the system will display a prompt – click on [No] if the wrong date is entered, or [Yes] to continue with adding the deed record.

IAUC S182-Real Estate Sales History [theresa]								
File Edit Ledg	ers Purchase Orders Accounts Payable Fixed Assets Hu	iman Resources Bu	idget Collection	ons Tax	Motor Exci:	e Misc Billin	g System	Favorites Help
16 🛍 🛎 d	5 H + + H 🖑 🖏 🔍 🖬 📴 🛃 🥼							
Gato	ĸ	eal Estate Sa	lies Histor	У		Cu	rrent Owner	
	Parcel 0003 -0002 -0000			К	ENG, SHAL	JNA		
Actions	Account 0003 -0002 -0000			1	5 OLD LOO	G LN		
	Location FARM ST			В	ELLINGHAN	1, MA 02019	-0000	
Upquiry								
r a topon y	Transfer Date Owner Name	Own %	Transfer Amt	Type Book	Page	Document 04407	Reg Date	Land Cert#
	15-Sep-2016 KING, SHHURH	100.00	1.00	H 3446	2 604	94105	-	
L Bill Payment	12-Jul-2001 SPEAR, WILLIAM A + ROSEMARY L	100.00		1514	2 504		-	
_								
1 Add Deed								
			Copy	a deed	with a	date olde	er than th	ne most
2 Delete Deed	Copy Deed		curre	ent dee	d will i	nsert the	record i	n date
	Required: Transfer Date (mmddyyyy) 05 May 2010		ord	er and I	nave n	o effect o	n the O	DR or
4 Copy Deed	2				urrent	Owner o	lata	J
3 Edit List	Lookup OK Cancel Clear All							

Figure 8 Copy a deed that is not the most current deed

If an "older" deed record (not the most current) is selected and copied, with a date entered that is *prior* to the most current record,, the entry will be made on the **Real Estate Sales History** screen but will *not* be reflected on the **Current Owner** screen. If the date entered is more recent than the most current deed, the current owner record will be updated with any new information entered on the screen and the new deed will appear at the top of the list.



For maximum flexibility, the system will allow copying an "older" deed – be sure to position the cursor on the most current record before clicking on the [<u>4</u> Copy Deed] button. If an error is made, use the [<u>3</u> Delete Deed] to remove the record created in error. A prompt will appear to confirm the intent to delete.

[ADM-AUC-RE-5,566]

4. FROZEN SCREEN?

Occasionally, users report that their session has **"Frozen"**. To minimize the chance of this happening, always exit the system using **File > Exit** from the menu.

🚥 [AUC] 27000-Led	lgers Help Refe 🛛 🕂		192.168	3.168.24	- 1	
File Edit Ledgers I	Purchase Orders Collections	Tax	Motor Excise	Misc Billing	System	
Printer Setup	+ → ₩					
Print						
Exit						

"Frozen" sessions may result if the **X** on the blue connection bar at the top of the screen is used to close the AUC session, or if the session is abandoned at the end of the workday.

Users who will be away from their desks for longer than 30 minutes should exit from the AUC application using **File ▶ Exit** from the menu prior to departing. Do the same at the end of the workday, as open sessions on the server may result in unintended consequences.

5. HELP REFERENCE LIBRARY

5.1. New or Updated Documents

•	ABATEMENTS	RE-540 Abatement Rescission	[Re-Installed]
•	OTHER	RE–705 Locking Screen	[New]

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