



REAL ESTATE TAX BILLING

RELEASE NOTES – SEPTEMBER 2018

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

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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.

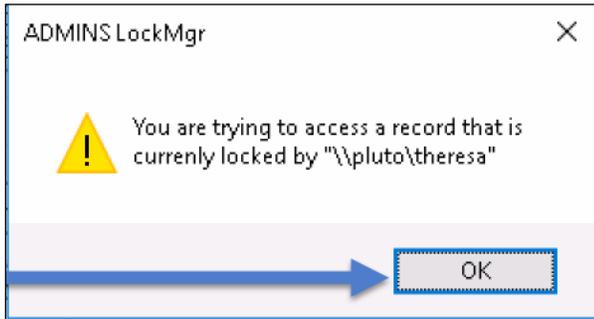
Anytime this little gal appears in release notes, it means that one of our customers was asking for an enhancement; she will point out those new features.





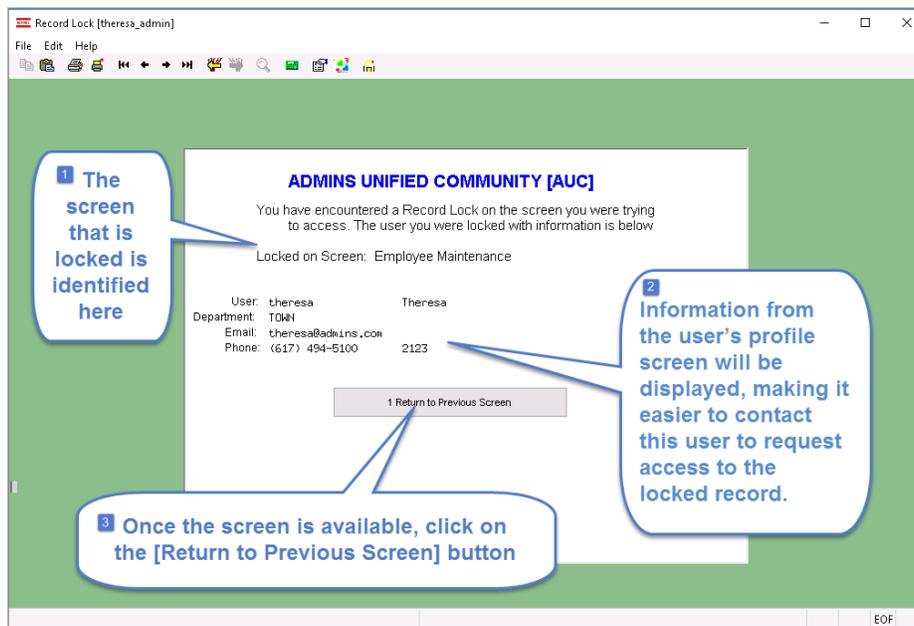
1. WHO IS LOCKING A RECORD ON THE UPDATE SCREEN? [New]

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].



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.

Figure 1 Popup notification that a record is 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, [RE-705 Locking Screen](#).

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

[ADM-AUC-SY-8063]

2. OWNER OF RECORD MAILING ADDRESS UPDATES [Enhancement]

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.

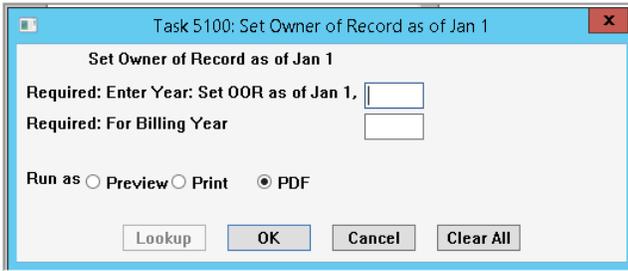


Figure 3 Before—Only the YEAR fields were available

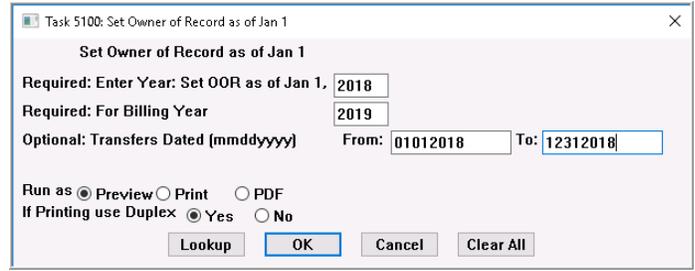


Figure 4 After with the Optional Date Range fields

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

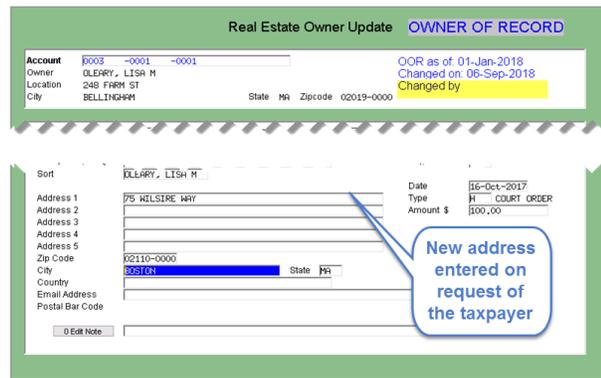
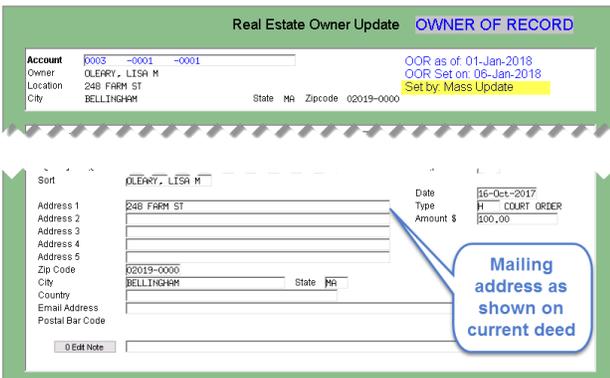
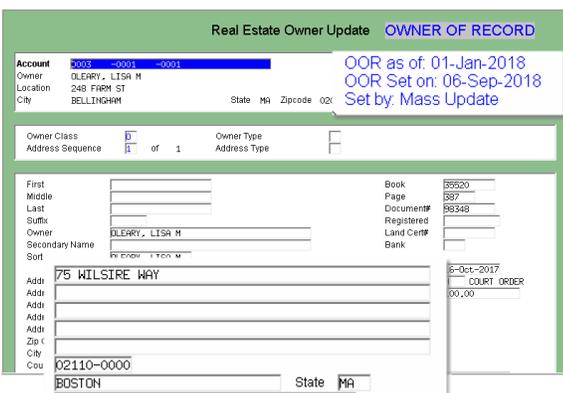


Figure 5 Update a mailing address without a new deed

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.



After the process is run to update the **OOOR**, 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 **OOOR** 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 (OOOR) 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]



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.

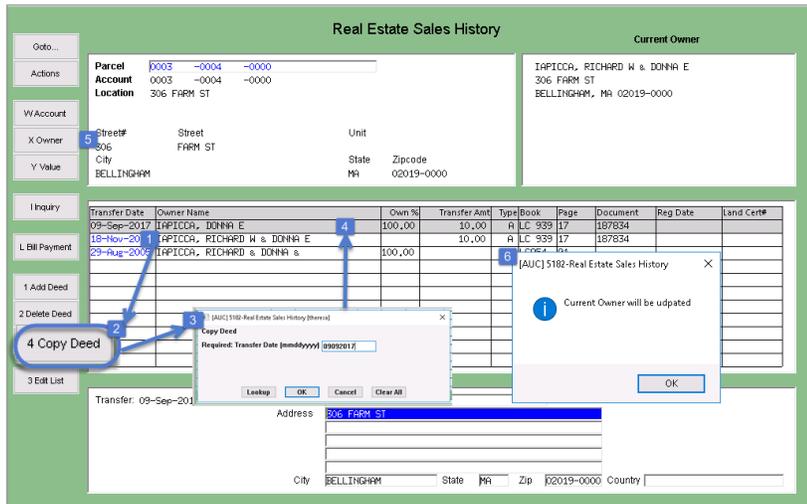


Figure 6 Using the new [Copy Deed] button to

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.
5. To view the changes on the Owner Update screen, click on [X Owner].
6. When exiting the record a message box appears with a notice that the **Current Owner** will be updated. Click on [OK].

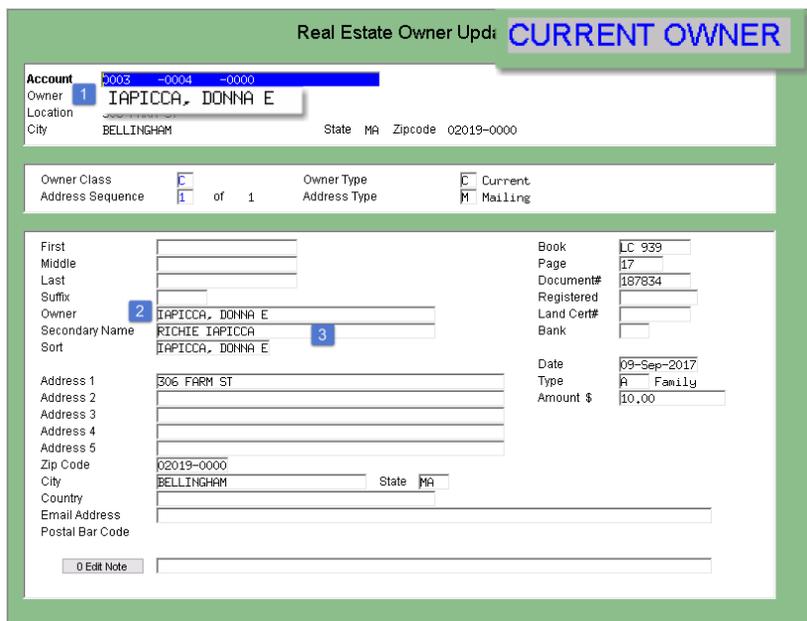
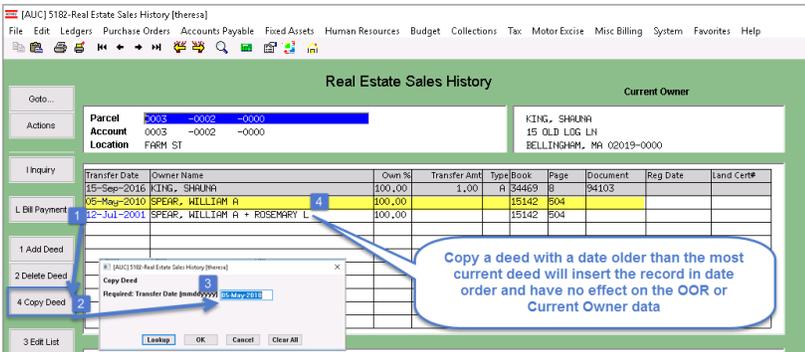


Figure 7 The Current Owner screen shows the updates

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.



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.



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.

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

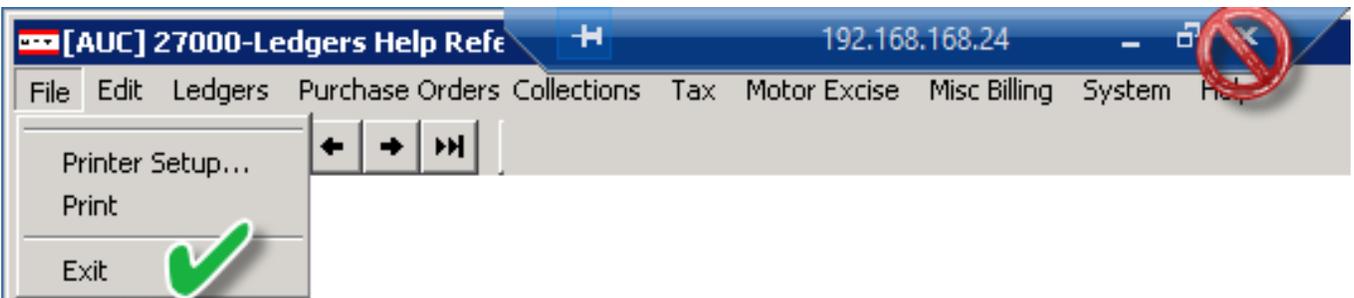


For maximum flexibility, the system will allow copying an “older” deed – be sure to position the cursor on the most current record before clicking on the [4 Copy Deed] button. If an error is made, use the [3 Delete Deed] to remove the record created in error. A prompt will appear to confirm the intent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



“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]