



Real Estate Tax Billing

Release Notes

December 2024

This document outlines the new enhancements to the **ADMINS Unified Community (AUC) REAL ESTATE TAX** including the addition of posting dates and times on the billing history screen, and the addition of fiscal year and bill run information in report file names. Authorized users can now easily retrieve these reports.

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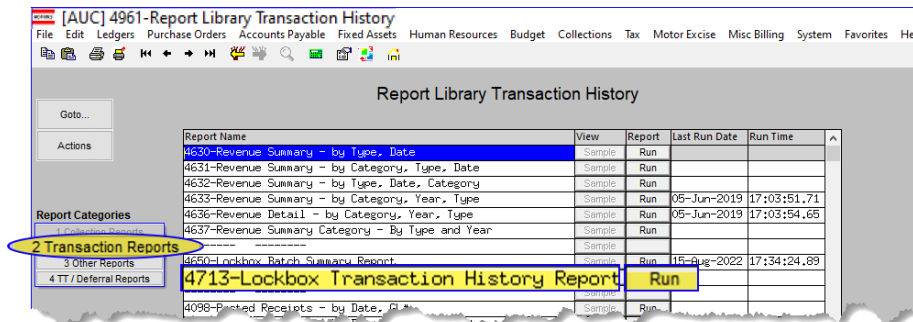
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1 Lockbox Transaction History Report #4713 [Enhancement]

ADMINS added a report that identifies all posted transactions in Collections related to a specific lockbox upload. This report provides detailed information on each payment made via a lockbox upload.

Collections ► Reports ► Report Library ► Transaction Reports



To run the report from the menu, select #4713 from the Transaction Reports library and click the **Run** button:

The system will present the prompt shown below:

Enter or select the required lock box type from the lookup.

Optionally, use the Pay Date Range fields to filter results. Leaving these fields blank will show all lockbox history for the selected type.

The report will be generated in Excel format.

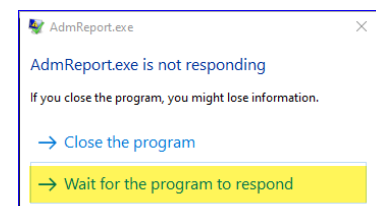
The system will show a progress bar while the report is being prepared:



Please be patient as the process completes—it will take some time. Using a Pay Date Range restriction will speed it up.

If this message is displayed, please click on “Wait for program to respond” to allow the report to finish.

A sample of the report is shown below.





The screenshot shows a spreadsheet with columns: User Batch, Batch Date, Type, Bill, Owner Name, Amount, Post Date, Transaction Description, Lockbox File, Lockbox Date, and Time. Callout 1 points to the User Batch column. Callout 2 points to the Batch Date column. Callout 3 points to the Transaction Description column. Callout 4 points to the Lockbox File column. Callout 5 points to the Lockbox Date and Time columns. A text box in the spreadsheet says "Transaction description shows the original lockbox batch number".

- 1 is the User Batch number.
- 2 the original batch number if this is a reversal batch
- 3 lockbox filename
- 4 user uploading the lockbox
- 5 date & time of the lockbox upload – the filename, user, date & time are not shown for reversal batches

The numbered items from the image are described here. All the columns are described in the table below.

While the example shown is for Real Estate, the report works the same way for Personal Property.

Table 1 Understanding the columns on the report

Column Label	Explained
User-Batch	<p>The lockbox batch number, starting with "LRC", is assigned upon file upload. Reversal batches start with "RVB".</p>
Batch-Date	<p>The batch date refers to the date of the batch, which could differ from the payment transaction dates. By default, it is set to the date the lockbox file was uploaded. The batch date displayed on the report will reflect any modifications made in the screen above, and the transaction history report will show the override date in the Batch Date column if applicable.</p>

Type	The type of tax for this payment e.g., RE for Real Estate, PP for Personal Property
Year	The bill year



Column Label	Explained
Bill#	The bill number
Owner-Name	The owner name as supplied in the lockbox file
Amount	The dollar amount of the paymet
Pay-Date	If there are no paydates in the file, the pay date will default to the date of the upload. See above for the override notes.
Post-Date	The general ledger date of the posted transactions
Transaction-Description	The transaction description shows the type of bills in the lockbox file, the banking institution, the lockbox batch number assigned when the lockbox was uploaded, and the date of the payment or reversal.
Lockbox-File	The filename as downloaded from the banking institution. The filename is important as the process uses it to check for duplicates.
Lockbox-User	The username of the person uploading the lockbox
Date	The date the process was run
Time	The time the process was run

[ADM-AUC-RC-8676]

2 Billing History Screen #4321 Posting Dates [Enhancement]

ADMINS made two changes to the Billing History Screen.

2.1 Added the Posting Date and Time to the Top of the Screen

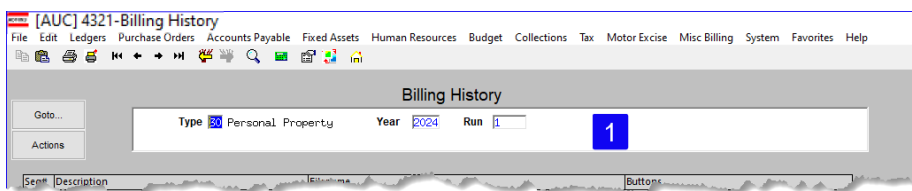


Figure 1 Before – no posting date & time

1 Prior to the software update, the billing history screen did not include the posting date or time.

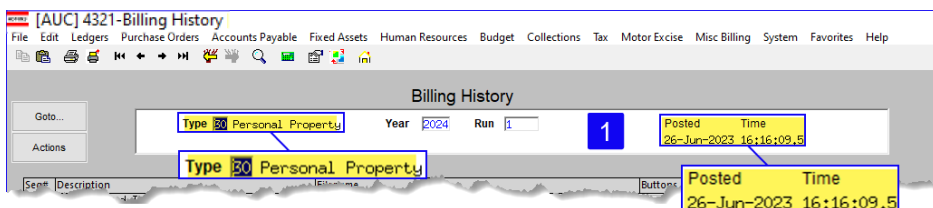


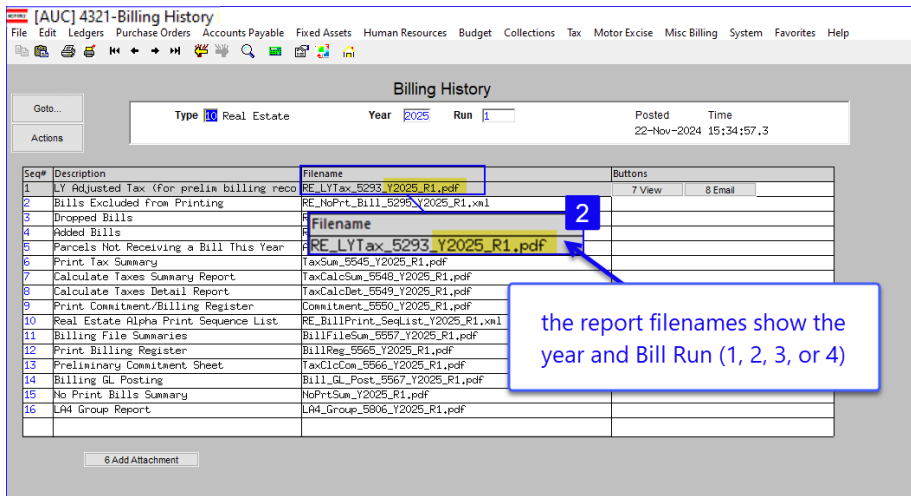
Figure 2 After the posting date & time is stamped at the top of the screen

The posting date and time are now shown in the top section of the screen.



2.2 Added the Fiscal Year & Bill Run to the Report File Names

2 The reports in the list previously did not include the Fiscal Year and Bill run in the file name. The image shows the Real Estate Billing History; Personal Property will do the same.



Report file names in the billing history now include the fiscal year and bill run for easier identification.

Authorized users can easily retrieve the reports here.

Figure 3 The reports are renamed to show the Fiscal Year / Bill Run

[ADM-AUC-RE-5724]

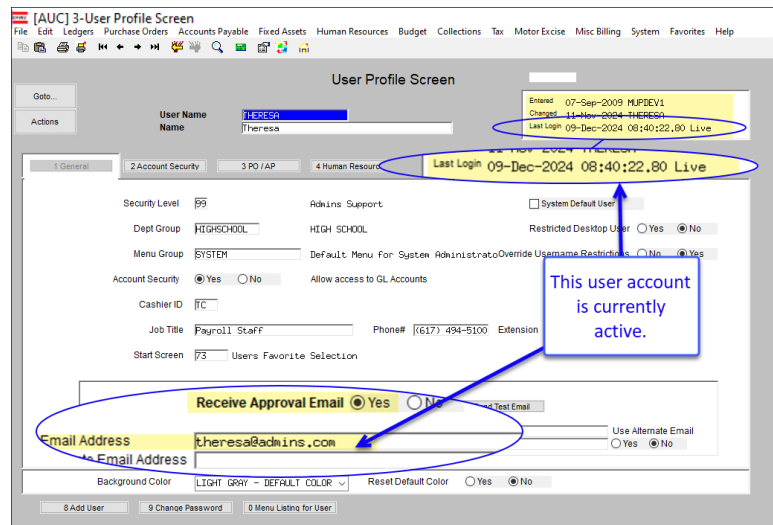
3 Email Notice to Users of Intent to Suspend an Account

Users are inactivated if they have not logged in before their expiration date.

For instance, on sites with a six month expiration window, users who haven't logged in since 20-May-2024 would be "suspended" or "marked inactive" on 20-November-2024.

The notification period is 14 days from the suspension date, in this example, from 05-November-2024 through 20-November-2024.

The notification is sent if there is an email address present on the User Profile screen:





Up to two reminder emails are sent: the first ~14 days before account expiration, and the second ~5 days before. If users do not log in when reminded, their accounts will be deactivated.

Two emails are sent to allow for users on vacation, etc., to have time to respond. Log in before the expiration date to prevent the suspension.

The emails include expiration dates, steps to prevent suspension, and instructions for requesting reactivation after suspension.

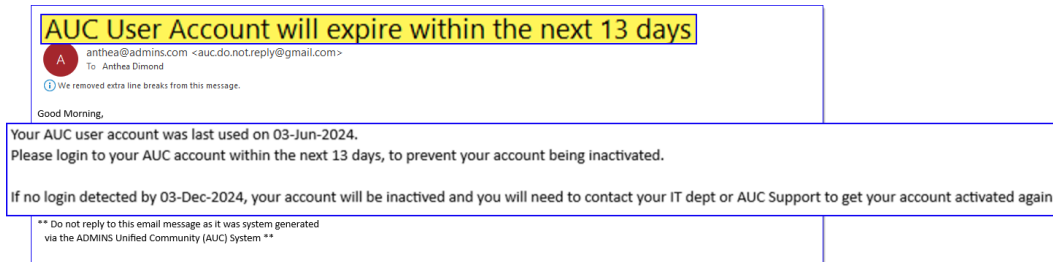


Figure 4 Email example sent two weeks before the username expiration date

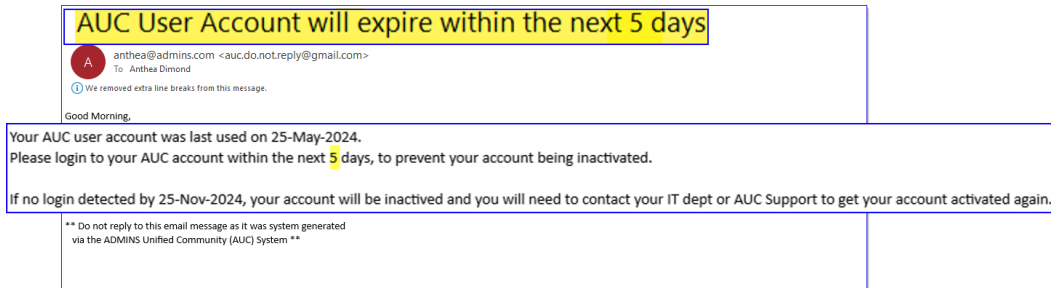


Figure 5 Email example sent the following week

[ADM-AUC-SY-8356]

4 Help Reference Library & ADMINS Website

This section lists the new and updated documents that are available in the Help Reference Library and the ADMINS website.

4.1 New Content on ADMINS.com

[User Account Security Inquiry Screen](#) (2:38) (new video)

[New]