MMTA Winter Workshop

Tax Tips and Tricks

Brad Russman
Agenda/Topics

- Contact customer support
- Taxpayer Requests for Information
- Reminder Bills (new options)
- Payoff Amounts
- Wild card search character
- Including Interest in Refunds
- Manage Report Library
- Direct imports – special assessments and various items
- ‘Sequentially Search for Various Fields’ report and searching reports
- Blocking and marking
- Table searches
- Payment Utilities
- Report Queries and Report Designer
Contact Customer Support

By phone:
517-641-8900 or 855-BSA-SOFT (855-272-7368)

Email:
taxsupport@bsasoftware.com
Contact Customer Support
Via program:
Help > Contact Technical Support > Request Support Phone Call
Taxpayer Requests for Information

Most common requests can be found under the Print icon of the Edit Parcel screen:
Reminder Bills (new options)

- Reports > Bills > Reminder Bill
- New options for ‘Use Custom Payoff Dates’
Providing Payoff Amounts

‘Calculator’ button on Edit Parcel screen:
‘Wild Card’ Search Characters

The asterisk (*) acts as a wild card when doing parcel searches

- **SMITH**
  returns any name starting with Smith

- **SMITH**
  returns any name ending with Smith

- **SMITH**
  returns any name containing Smith
Including interest in refunds

By default, program does *not* refund interest on fully paid parcels.

To do so requires a program option.
Manage Report Library

- Tools button in the Run Reports window
- Allows for hiding of unused reports (user-specific)
Direct Imports

- File > Import > Various Imports...

- Standard Special Assessment Import from Another Equalizer Tax System
  or

- Various Items From Another Equalizer Tax System
  (mortgage/billing codes, deferment flags, comments, email address, user alpha fields, etc)
‘Sequentially Search for Various Fields’ report

- Under Reports > Balancing/Settlement Reports
Blocking and Marking

Means of identifying a set of records that we may want to include in a report or utility.

- Block – contiguous set of records
- Marked Records – allows for non-contiguous records. Also allows for re-sorting the table without losing the marked records (not true of a Block)
Blocking

- ‘Block Start’ button

- Right click menu
  (Right click on first record, choose ‘Block Start’, right click on last record, choose ‘Block End’)

- Shift + click
  (Click on first record, hold Shift and click on last record)

- Quick Block button
Marking

Make sure you start with a clean slate first (Mark > Unmark All Records)

- Spacebar
- Quick Mark button
- Ctrl + click
- Count button
Marking and Blocking used together

Say you want a report of all payments taken in July, but excluding a certain batch (7) from that month:

• Block the entire month (by date)
• Mark that block (Mark > Mark Current Block)
• Index by Batch #, block the batch to exclude
• Unmark that block (Mark > Unmark current block)
• Run report on Marked Records
Table Searches

Can search for data in the ‘Sort Index’ column by simply typing it.
Payment Utilities

Utilities > Accept Barcoded Payments En Masse
- Can be used with or without a barcode scanner
- If paying something other than the current season, can enter %S (summer) or %W (winter) to control the season

Utilities > Add Group of Payments En Masse
- Allows for paying a population of parcels (Block, Marked records, etc)
- If paying a block, can also mark records in that block to exclude them