

# PONTEM<sup>®</sup> PROPERTY TAX ADMINISTRATION

A Quick Overview

# BEFORE YOU BUY...

- Choose a Software Vendor You Can Rely On
  - Founded in 1979
  - Several Product Lines Sold Nationally
    - Property Tax Management - Fund Accounting
    - Cemetery Record Management
  - Property Tax Product Line
    - First Release in 1985
    - Mature Product with Years of Customer Satisfaction and Feedback
    - Hundreds of Installations including Counties, Cities, Villages and Townships



888.742.2378

[www.pontem.com](http://www.pontem.com)

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# WHO SHOULD USE IT?

- Counties
- Municipalities
  - Cities, Villages, Townships
- Tailored to Meet State Requirements
- Large or Small Organizations
  - Pontem Software is Scalable and *Affordable* Regardless of Your Organization's Size



# UNPARALLELED COMMITMENT TO CUSTOMER SERVICE AND SUPPORT

- ◉ Knowledgeable Support Specialists
- ◉ 24/7 Emergency Support
- ◉ Unlimited Remote Training and Support
- ◉ Free Upgrades - Including Next Generation Product Releases

*With Pontem's support plan, you not only receive GREAT service, you can rest assured you'll never have to purchase a new release upgrade again!*



# MANAGING YOUR DATA

## ○ Manage Parcel Records

- Automated Imports
  - Appraisal Data / Name and Address Changes
- Comprehensive Parcel Maintenance
  - Splits and Legal Description History
  - Street Index
  - Unlimited District/Neighborhood Codes
  - Unlimited Parcel Notes
    - Searchable by User-defined Category
- GIS Map Viewer
- Image and Document Management
  - Associate an Unlimited # of Images and/or Documents with Each Parcel
- Automated Data Exports

The screenshot displays the 'Parcel Master' form in the Pontem Tax Administration software. The window title is 'localhost:City of Independence KY - Pontem Tax Administration'. The interface includes a menu bar (File, Edit, Reports, Help) and a toolbar with buttons for 'Print', 'Edit General', 'Manage Notes', and 'Status'. A 'Primary Tasks' sidebar on the left lists functions like 'Overview (F4)', 'Manage Property Records (F5)', 'Tax Roll Setup (F6)', 'Prepare Tax Bills (F7)', 'Tax Bills and Collections (F8)', and 'Tax Receipts (F9)'. The main form area shows details for parcel 005-40-00-019.00, owned by MCCANN ANGELA at 4250-2 BERRYWOOD DR. It includes fields for 'Owner Name & Address', 'Property Type' (Real), 'Acres' (0.000), 'Property Address', 'Current Class' (RR Residential - Real), 'Former Class', 'School District' (01000 KY Schools), 'Debt School', 'Parent Parcel', 'Date of Split', 'Map Code', 'Co-ords', 'Tax Unit' (073 City of Independence), 'Village', 'Last Sale Date', and 'Last Appraisal'. A 'Notes' table at the bottom lists records with columns for 'Notes', 'Catego...', 'TaxYr', 'Report', 'CD', and 'Description'. The status bar at the bottom shows the date 11/22/2010, time 12:41:01 PM, and the user PONTM.

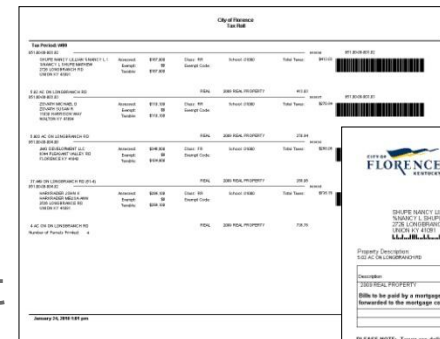
# FLEXIBLE, POWERFUL, EASY-TO-USE

## ◎ Tax Billing and Collections

- Fully-Automated Tax Bill Calculation
- Customized, Bar-coded Tax Bill
- Current and Delinquent Tax Bill Management

## ◎ Fully Automated Collections

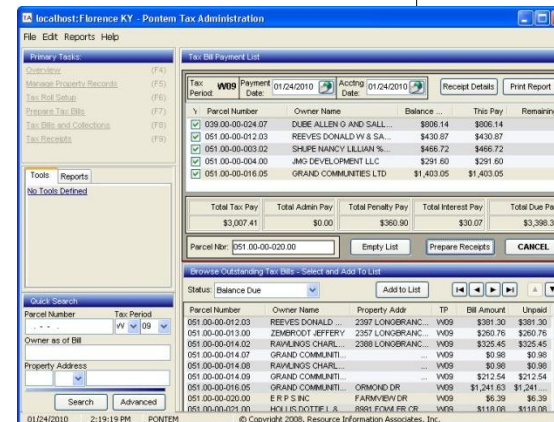
- Easy to Use Batch Receipting
- e-Payment Collections
  - Escrow Agents
  - Bank Lock-Box/Credit Card Payments
  - Tax Bill Payoff Calculator



A sample tax bill from the City of Florence, KY. It lists property details for three parcels, including parcel numbers, owner names, and assessed values. Each parcel entry includes a barcode and a total amount due.



A sample 2009 Property Tax Notice from the City of Florence, KY. It provides contact information for the City of Florence, including the address, phone number, and office hours. It also includes a table with property details and a section for payment instructions, including a note about delinquency and interest charges.



A screenshot of the Pontem Tax Administration software interface. The window title is 'localhost: Florence KY - Pontem Tax Administration'. The main area displays a 'Tax Bill Payment List' with columns for Tax Period, Parcel Number, Owner Name, Balance, This Pay, and Remaining. Below the list, there are summary totals for Total Tax Pay, Total Admin Pay, Total Penalty Pay, Total Interest Pay, and Total Due Pay. The interface also includes a 'Quick Search' section and a 'Browse Outstanding Tax Bills' section.



# AND THERE'S MORE!

## Online Property Tax Search

- Automated, Unattended Web Updates
- e-Commerce Enabled

**CALEDONIA TOWNSHIP**

Record last updated on **Sunday, November 21, 2010**

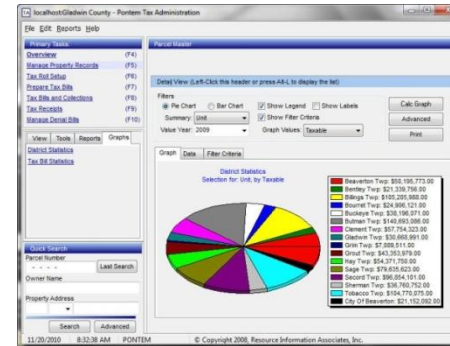
Parcel: 023-195-009-003-00  
 Owner(s) of Record: HARRIS, LINDA C  
 Owner Address: 1978 BIRCH ST, HUBBARD LAKE MI 49747  
 Acres: 0.601  
 Current Assessment: \$53,000  
 State Equalized: \$53,000  
 Taxable Value: \$33,753  
 Homestead: 100.000%  
 Homestead Exempt: \$33,753

Year	Taxable Value	Tax Bill	Total Due	Penl. to Date	Paid Date
2010	\$33,753	\$487.55	\$487.55	\$0.00	

Code	Description	Tax Rate	Levy	Penl. to Date
001	County Operating	4.17820	\$141.62	\$0.00
001	Alcona Schools Bond	1.30000	\$43.95	\$0.00
350	State Education Tax	6.00000	\$202.54	\$0.00
400	AMA-ESD Allocated	0.21500	\$7.25	\$0.00
401	AMA-ESD Charter	0.62250	\$21.68	\$0.00
402	AMA-ESD DISTRICT VOTED 07	1.33100	\$44.95	\$0.00
	FEE	0.00000	\$4.62	\$0.00

Year	2010	2009
Transferor Date	401	401
Assessed Value	\$53,000	\$57,800
EQ Factor	1.00000	1.00000
Equalized Value	\$53,000	\$57,800
Taxable Value	\$33,753	\$33,855
Homestead Exempt	100.000%	100.000%

## Automated Graph Statistics



## Image / Document Management

- Unlimited # for Each Parcel Record!

Parcel Number: 023-195-003-00  
 Owner Name: HARRIS, LINDA  
 Property Address: 1978 BIRCH ST, HUBBARD LAKE MI 49747

Document Viewer: House First View  
 170471.jpg



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# NAVIGATING THE SOFTWARE

## Access All Major Functions from One Screen

The main screen is divided into 3 areas.

**Primary Tasks:** Click to change what is shown in the main workspace. The workspace is where all your data will be displayed.

**View, Tools, and Reports Tabs:** Display relevant information for the primary task you've chosen.

**Quick Search:** Find information *fast!* Tailored to conduct common searches from the workspace view.

**Main Workspace:** Displays list views or detail views related to the chosen Primary Task.

Parcel Number	Owner Name	Property Address
061.21-22-044.00	ABDULLAH ZAKI & JACQUELINE	108 THOMAS ST
P20.07-00-000.09	ABERCOMBIE & FITCH #781	2028 FLORENCE MALL
P20.07-00-000.10	ABERCOMBIE KIDS #394	2012 FLORENCE MALL
062.00-36-013.00	ABERNATHY JEFFRE	9104 BRANTLEY WAY
061.10-28-014.00	ABERNATHY THOMAS DEAN & JEAN	117 ST JUDE CR
061.18-28-015.00	ABERNATHY TOM D AND JEAN M	53 PATRICIA ST
P20.07-00-000.11	ABES PEST CONTROL INC	9017 STEEPLE BUSH DR
072.07-04-086.00	ABNER BEVERLY A	6844 HIGH RIDGE AVE
061.08-22-063.00	ABOAGYE SAMUEL K & MEGAN S	7 MIRIAM DR
P20.07-00-000.12	ABRAPOWER INC	8055 DIXIE HWY
051.00-09-006.00	ABSOM LLC	7004 BOWMAN CT
062.03-30-010.03	ACCARDI PHILIP J & VICKI L	8581 COMMONS CT
200.6P-00-000.18	ACCENT DISTRIBUTING OF KY	
062.00-42-003.00	ACE FLORENCE	8515 US 42 HWY
051.00-02-008.00	ACES PROPERTIES LLC	2672 RIDGECREST DR
051.00-02-022.00	ACES PROPERTIES LLC	9008 STEEPLEBUSH DR
061.99-22-001.00	ACES PROPERTIES LLC	TANNERS LN
062.00-10-041.00	ACES PROPERTIES LLC	16 N DILCREST CIR
073.00-03-121.00	ACKAH LEONARD N & MERCY A	200 MERRAVAY DR
061.26-24-019.00	ACKERMAN GWENDOLYN M	15 ORCHARD DR

Tax Year	Class	School	Taxable	Assessed	Exemption
2007	RR	01000	\$100,600	\$132,000	\$31,400



# NAVIGATING THE SOFTWARE

## ◉ Toggle between “List” and “Detail” Views

Click a Primary Task to view a list of the records in your database. From here you can either click on the toggle bar to switch to the Detail View OR narrow your list with a ‘either a Quick or Advanced Search’ to find the records you’re looking for. Click on a record from the List View to display its detail record.

localhost:Florence - Pontem Tax Administration

File Edit Reports Help

Primary Tasks:

- Overview (F4)
- Manage Property Records (F5)
- Tax Roll Setup (F8)
- Prepare Tax Bills (F7)
- Tax Bills and Collections (F8)
- Tax Receipts (F9)

Parcel Master

Parcels List (Double-Click the parcels you wish to view/edit)

Parcel Number: 061.21-22-044.00 Property Owner: ABDULLAH ZAKI & JACQUELINE  
Property Address: 108 THOMAS ST

Parcel Number	Owner Name	Property Address
061.21-22-044.00	ABDULLAH ZAKI & JACQUELINE	108 THOMAS ST
P20.07-00-000.09	ABERCOMBIE & FITCH #781	2028 FLORENCE MALL
P20.07-00-000.10	ABERCOMBIE KIDS #394	2012 FLORENCE MALL
062.00-36-013.00	ABERNATHY JEFFRE	9104 BRANTLEY WY
061.10-28-014.00	ABERNATHY THOMAS DEAN & JEAN	117 ST JUDE CR
061.18-28-015.00	ABERNATHY TOM D AND JEAN M	53 PATRICIA ST
P20.07-00-000.11	ABES PEST CONTROL INC	9017 STEEPLE BUSH DR
072.07-04-086.00	ABNER BEVERLY A	6844 HIGH RIDGE AVE
061.08-22-063.00	ABOAGYE SAMUEL K & MEGAN S	7 MIRIAM DR
P20.07-00-000.12	ABRAPOWER INC	8055 DIXIE HWY
051.00-09-006.00	ABSOM LLC	7004 BOWMAN CT
062.03-30-010.03	ACCARDI PHILIP J & VICKI L	8581 COMMONS CT
200.6P-00-000.18	ACCENT DISTRIBUTING OF KY	
062.00-42-003.00	ACEFLORENCE	8515 US 42 HWY
051.00-02-008.00	ACES PROPERTIES LLC	2672 RIDGECREST DR
051.00-02-022.00	ACES PROPERTIES LLC	9008 STEEPLEBUSH DR
061.99-22-001.00	ACES PROPERTIES LLC	TANNERS LN
062.00-10-041.00	ACES PROPERTIES LLC	16 N DILCREST CIR
073.00-03-121.00	ACKAH LEONARD N & MERCY A	200 MERRAYAY DR
061.26-24-019.00	ACKERMAN GWENDOLYN M	15 ORCHARD DR

Tax Year: 2007 Class: RR School: 01000 Taxable: \$100,600 Assessed: \$132,000 Exemption: \$31,400

10/09/2007 5:31:16 PM PONTEM

localhost:Florence - Pontem Tax Administration

File Edit Reports Help

Primary Tasks:

- Overview (F4)
- Manage Property Records (F5)
- Tax Roll Setup (F8)
- Prepare Tax Bills (F7)
- Tax Bills and Collections (F8)
- Tax Receipts (F9)

Parcel Master

Edit General Manage Notes

Detail View (Left-Click this header or press Alt-L to display the list)

Parcel Number: 051.00-00-014.02 Property Owner: RAWLINGS CHARLES & JUDITH  
Property Address: 2388 LONGBRANCH RD

**Owner Name & Address**  
RAWLINGS CHARLES & JUDITH  
2388 LONGBRANCH RD  
UNION KY 41091

**Unit**  
003 City of Florence School: 01000 Florence Sch

**Village**  
Debt School

**Property Address** GIS Map Map Me  
2388 LONGBRANCH RD  
UNION KY 41091

**Property Type:** Real  
**Current Class:** RR Residential - Real  
**Former Class:**

**Parent Parcel** **Date of Split**

**Town Range Sec Zone Acres**  
0.000

**Last Sale Date** **Last Appraisal**

Notes Categ... Expire District Description X

Search Advanced

10/10/2007 9:01:01 AM PONTEM

# MANAGING YOUR DATA

- “Smart” Data Entry Helps Avoid Errors
- Unlimited History
  - Assessed and Taxable Values
  - Tax Bill History
- Ultimate Flexibility with User-defined Tables and Preferences
- Automated Data Exchange with Third-Party Products

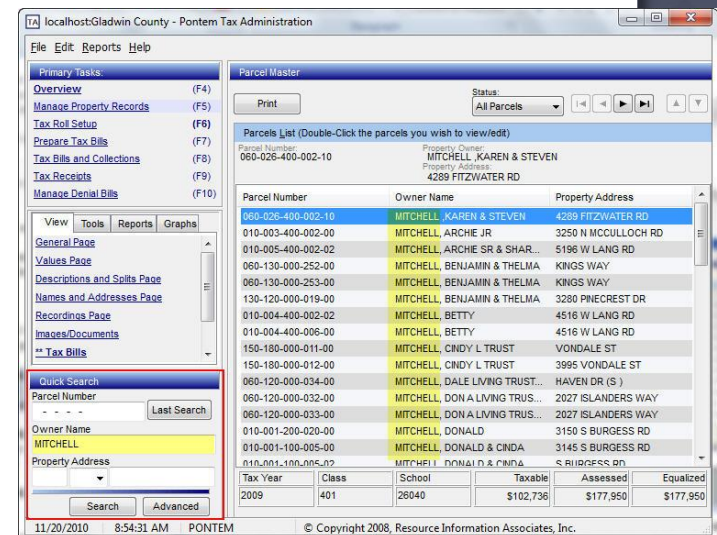
# ROBUST SEARCHES & REPORTING

- Quick Access to Your Data is Crucial

- Retrieve Information with Easy to Use Searches
  - Quick Search - *Find Information FAST!*

Tailored to conduct common searches. Each workspace view has its own customized “Quick Search”.

Enter your criteria to quickly display a results list.



# ROBUST SEARCHES & REPORTING

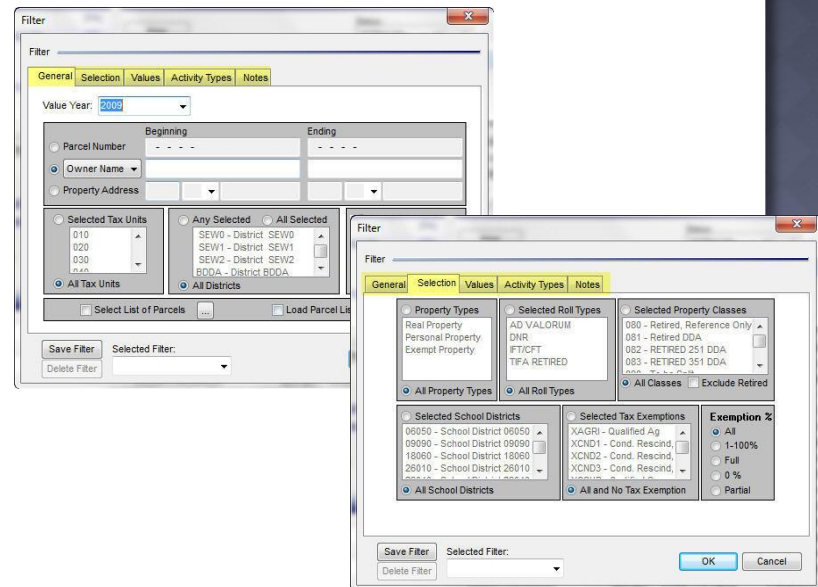
- Need to Dig a Little Deeper in Your Search?
  - Advanced Search is the Perfect Solution!

Advanced Search filters provide powerful, yet easy to use capability to build complex, compound queries.

Display the results on a List View, then click on a record to display more detailed information.

Advanced Search filters are also used for defining information you want to include in a report.

You can even name and save filters for frequently used searches!



# ROBUST SEARCHES & REPORTING

## Dynamic Reporting Tools

### Print Preview Tool Bar

- Print (Including 'Print to File' in Various Formats)
- Automatically Create PDF and E-mail
- Re-filter with New Criteria
- Find Text or Phrases Within Report

Print Preview

ToolBar - Print or Email Report    ToolBar Re-filter or Find Text

County of Gladwin  
Top Ranking Property Owners Report

Rank By: Taxable Value

Rank	Owner Name	Parcel Count	Taxable	Equalized	Assessed	Acres
<b>Use: Tax Bill Value</b>						
1	CONSUMERS ENERGY	52	\$10,494,304	\$10,547,506	\$10,547,451	126.780
2	EAST JORDAN PLASTICS INC	3	\$2,802,900	\$2,802,900	\$2,802,900	0.000
3	MICH DEPT OF NATURAL RESOURCES	48	\$1,999,000	\$8,610,400	\$8,610,400	0.000
4	OBERLOER PROPERTIES, INC.	1	\$1,722,900	\$1,722,900	\$1,722,900	10.850
5	CKD INVESTMENTS, LLC	6	\$1,551,000	\$1,551,000	\$1,551,000	38.890
6	PACIFIC PRESS TECHNOLOGIES	2	\$1,452,800	\$1,452,800	\$1,452,800	0.000
7	RIVERWALK PLAGE, LLC	1	\$1,432,500	\$1,432,500	\$1,432,500	0.000
8	M-01 LIMITED PARTNERSHIP, LTD.	1	\$1,387,000	\$1,387,000	\$1,387,000	0.000
9	CONSUMERS ENERGY CO	2	\$1,364,445	\$1,366,528	\$1,366,528	0.200
10	BOYCE TRUST HYDRO PROPERTY LLC	09	\$1,100,999	\$1,106,300	\$1,106,300	293.740
11	DESHAND, GARY & FLORENCE	7	\$1,088,707	\$1,560,600	\$1,560,600	176.030
12	SMITH, MICHAEL & AMY	12	\$1,051,360	\$1,189,332	\$1,189,400	142.800
13	PACKAGING DIRECT, INC.	1	\$1,038,745	\$1,038,745	\$1,038,745	0.000
14	DURA AUTOMOTIVE	2	\$931,247	\$931,247	\$931,247	0.000
15	STERLING, AVERY JR TRUST	1	\$920,829	\$935,800	\$935,800	34.260
Number of Records Printed: 15			\$1,078,282,077	\$1,405,684,291	\$1,405,682,247	

Report Filter Criteria

Tax Year: 2009  
Year: Current/Final Value for Tax Year

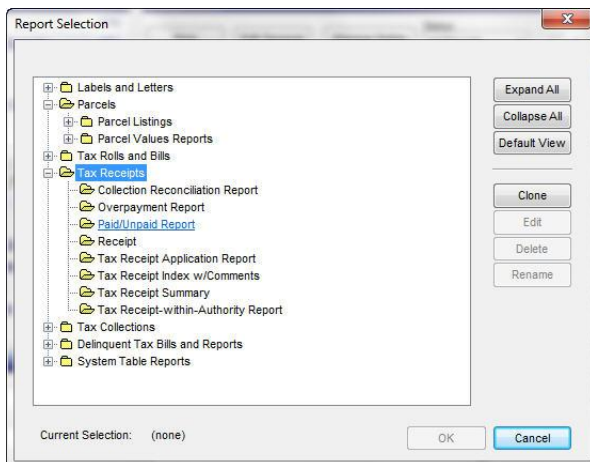
Page 1 of 1



# ROBUST SEARCHES & REPORTING

## Dynamic Reporting Tools

- Report Selection with Organized, Expanding Views
- Built-in Report Writer for Customizing Your Forms



Open one folder of reports or expand them all to find just what you are looking for.

Customize reports and forms with your organization's logo for a truly professional look.

**City of Florence**  
2009 PROPERTY TAX NOTICE

City of Florence  
Dept. 105, PO Box 1337  
Florence, Kentucky 41022-1337  
Telephone: (859) 647-5413  
Fax: (859) 647-5447  
Office Hours: 9:00am - 5:00pm  
www.florence-ky.gov

SHUPE NANCY LILLIAN NANCY L SHUPE M Parcel Nbr: 05100-00-003.02  
NANCY L SHUPE MATHEW Exemption: \$0  
2726 LONGBRANCH RD Property Location: 2726 LONGBRANCH RD  
LONGVIEW, KY 41091 UNION KY 41091

Property Description:	Assessed Value	Tax Value (Less Exemptions)	Rate per \$1000	Tax Amount
2009 FISCAL YEAR PROPERTY:	\$187,800	\$187,800	2.46509	\$4613.03
Bills to be paid by a mortgage company should be forwarded to the mortgage company immediately				
Amount Due if Paid by Nov 1 (2% discount applied if paid by Nov 1)				\$4547.77
Amount Due if Paid by Dec 31				\$4813.03

PLEASE NOTE: Taxes are delinquent after December 31, 2007 and will be charged 12% penalties and 1% interest per month. Call office during business hours for updated amount due.

Call office during business hours for updated amount due. All delinquent amounts due will be in addition to 2007 current tax bill.

DETACH AND RETURN STUB BELOW WITH PAYMENT

Make Checks Payable to & Mail to:  
City of Florence  
Dept 105, PO Box 1337  
Florence, Kentucky 41022-1337  
(859) 647-5413

SHUPE NANCY LILLIAN NANCY L SHUPE M  
NANCY L SHUPE MATHEW  
2726 LONGBRANCH RD  
LONGVIEW, KY 41091

PIDN:051 0000-003.02

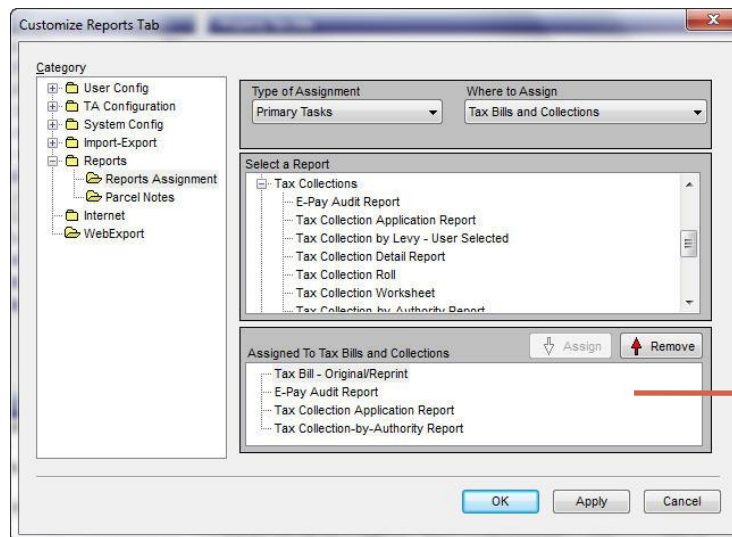
Amount Enclosed \$ \_\_\_\_\_  
Check # \_\_\_\_\_

Type of Credit Card: (Circle One) Visa Mastercard Discover American Express  
Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Signature: \_\_\_\_\_ Telephone #: \_\_\_\_\_

# ROBUST SEARCHES & REPORTING

## Dynamic Reporting Tools

- Customize Reports Tab on Each Workspace with Your Frequently Used Reports



# THANK YOU FOR YOUR INTEREST

**In an Era Where Every Day and Dollar Count,  
Pontem Can Make a Real Difference.**

- Call us at 888.742.2378
- Email [sales@pontem.com](mailto:sales@pontem.com)
- Visit our website - [www.pontem.com](http://www.pontem.com)

**We're Looking Forward to Hearing From You!**



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