Pontem[®] Tax Receipting Export/Create Tax Settlement

The Pontem Tax Receipting system can be configured to define the default export type for the local unit and a path to where settlement files will be created (or placed) so that every time an export is run the settings will be the same.

From the menu bar select Edit|Adjust System Preferences and click on the folder labeled Import-Export/Tax Rolls.

Property Records A	Settlement		
- Concepts			
TR Configuration		Standard Settlement	•
- Authorities	Export Directory:	Standard Settlement	
- Carlonites		Saginaw County	
- Co Villages	1	BS8A	
- C Schools	Erroll Addresses	countytreas@internet.com	
- Count Schools	Email Address.	countytreas@internet.com	
- Chine Schools			
- Prop Classes	Import		
- District Codes	20232344224	Default Import:	Prefix Parcels:
- Message Types		RIA-DOS	County ID
- C TIFA Districts		IRIA-DOS	County in
Tax Roll Types	File Location	C:\Pontem\Import\	
- C Import-Export	The Location	. In a number of	
- Tax Rolls	-Names & Addres	s Updates	
- C Reports	Never	Update Address - Match NAME or	n Full Label
Cinternet	C Match	NAME on first two Label Lines an	d allow address update
-			
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- Define the Default Export you will use. There are three options listed. Use Standard Settlement if your county uses Resource Software or Pontem to create the tax collection rolls. The Saginaw County option has been created for our Saginaw County customers to export data to their counties' system using an accounting date range. The BS&A export is used if the county uses BS&A software for tax roll management.
- Next define where you want the settlement file to be created. You may define a path to a CD drive in the field labeled *Export Directory*. The CD you use to receive the export files must be formatted as read/writeable.
- Use the browse key to help define the file paths. The software will create directories if they do not exist when you type them in.
- Do not configure the system to copy the export files directly to A: (floppy disk). If you are going to send your settlement files to the county on a floppy disk, use Windows Explorer to copy the export file.
- If you expect to email your settlement files to your county treasurer select the field 'Email When Done' and enter an email address.

Note: The user must have the right 'TR_Export' assigned to perform a settlement export.

Once the export configuration is set up:

1. Select File|Export and Create Tax Settlement. Enter the tax period and tax unit. Only users that are exporting data to Saginaw County will use the beginning and ending accounting dates.

Create Settlement Files - Export Data	×
Export Type: Standard Settlement Tax Period to Export: W07	
Tax Unit/Village: 010 - MY JURISDICTION	
Beginning Accounting Date Ending Accounting Date	
Final Settlement: 🗖	
Files that will be created:	
File Names: c:\pontem\settlement\TSUM/V07.010 File Names: c:\pontem\settlement\TDETVV07.010	
Send to County: c:\pontem\settlement\\V07-U010.zip	
Create Cancel	

Under 'Files that will be created:' you will see the names of the files that will be created and where they will be placed – in this case on drive C:. In the example above, you see that the file name for the compressed settlement file is W07-U010.zip. A summer file for the same unit would be S07-U010.zip. The name of the file contains the tax period and the unit number identifiers.

Click 'Create'.

2. When the export has completed, you will be notified where the compressed file is located. Click '**Close**'.

Create Settlement Files - Finished	×
Your file export is complete and can be foun	d at:
c:\pontem\settlement\V07-U010.zip	
	Close

3. Sending an Export File to the County :

If you have selected to email the file to the county in the **Adjust System Preferences|Import-Export**, your email will activate a new email message when the export is complete. The steps described here are for Outlook, but they describe the basic principals for attaching and sending email for other email programs.

🖥 Tax Roll Settlement Files for S05 Dated: 12/12/2005 - Message - Microsoft Word
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E To email@countytreas.gov
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Subject: Tax Roll Settlement Files for S05 Dated: 12/12/2005
🦻 🗩 Search 🔻 🔊 Smiley Central 🕮 Mail Stamp 🚦 My Signature 🕑 Mail Stationery 🕨 Cursor Mania 🔌 🖕
INSTRUCTIONS BEFORE SENDING: 1. Copy this path and file name to the clip board (select text, right-click, select copy):c:\pontem\settlement\UNIT140.zip 2. Select the Attach function (sometimes Insert or File menu option) 3. Paste path and file name from the clip board (ctrl+⊻) into the file name edit box and select the option to attach the file. 4. Once you have returned to this email window you can change this text and send your email.
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Follow the steps in the body of the email to successfully send the export file to the county. The steps are illustrated below using Microsoft Outlook.

- 1. Highlight c:\pontem\settlement\ W06-U<unit number>.zip listed in step one on of the email instructions and right click on the highlighted path. In the menu that appears select **Copy**.
- 2. Click on the paper clip or select **Insert|File** on the menu bar. Right click in the field labeled, File Name and select **Paste** from the menu box that appears. The path to the export file will be placed in the field. Click on '**Insert**'.

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3. Delete the instructions in the body of the email and type your own message. Click 'Send'.

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Dear County Treasurer, Here is my summer settlement filed dated <u>12/12/2005</u> . If you have any questions regarding this export, please feel free to call. Sincerely, Local Treasurer	★ Ø ¥ 4
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If the export file (W06-U<unit number>.zip) is smaller than 1.44 MB you can copy it to a floppy disk from Windows Explorer by browsing to the path that has been defined in the System Preferences for the *Export Directory*.

1. Browse to the described Export file path

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- 2. Right click on the export file (In this case W06-U040.zip)
- 3. Select Copy from the menu that appears
- 4. Browse to the drive that you want to copy the file to. Right click on the right hand side of Windows Explorer (this side is labeled Name).
- 5. Select Paste from the menu that appears



6. Once the copy is complete, you will see the file listed on A:\.

🔓 settlement						
File Edit View Favorites Tools Help					2	
Back • 🕥 - 🏂 🔎 Search 🎼 Folders 💷 •						
Address 🛅 C:\Pontem\settlement					💌 🄁 Go	
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You can copy the export file to a CD using the software that came with the CD burner. When the CD burning software is activated to create a data CD, browse to the path that is described in this pop up window when the settlement files are created.

Create Settlement Files - Finished	x
Your file export is complete and can be found	lat:
c:\pontem\settlement\V06-U040.zip	
	Close