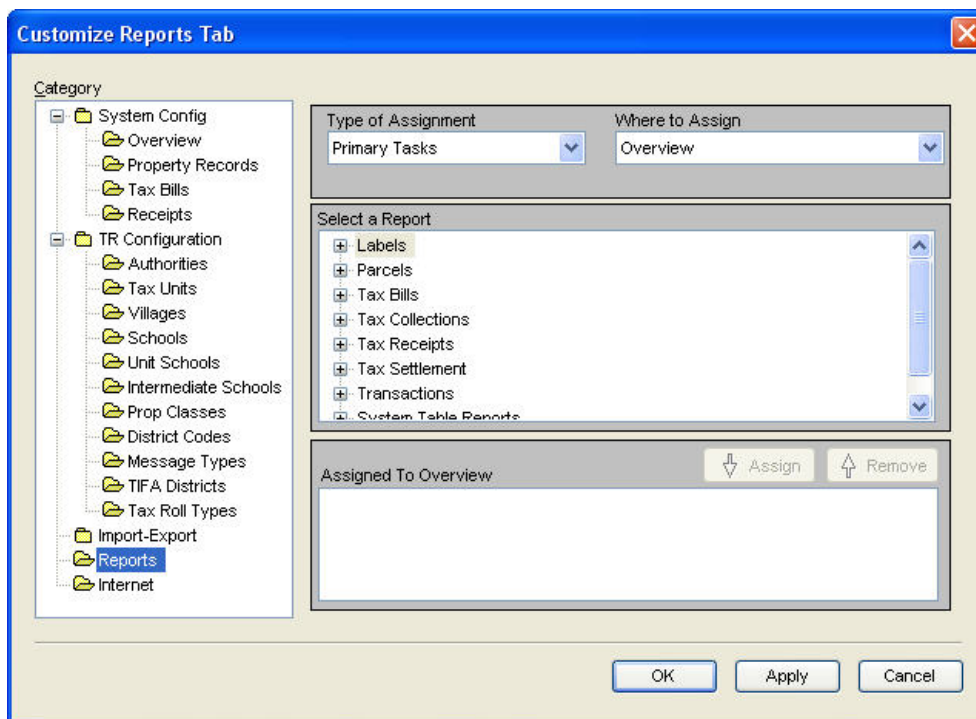


Pontem[®] Tax Administration Customizing the Reports Tab

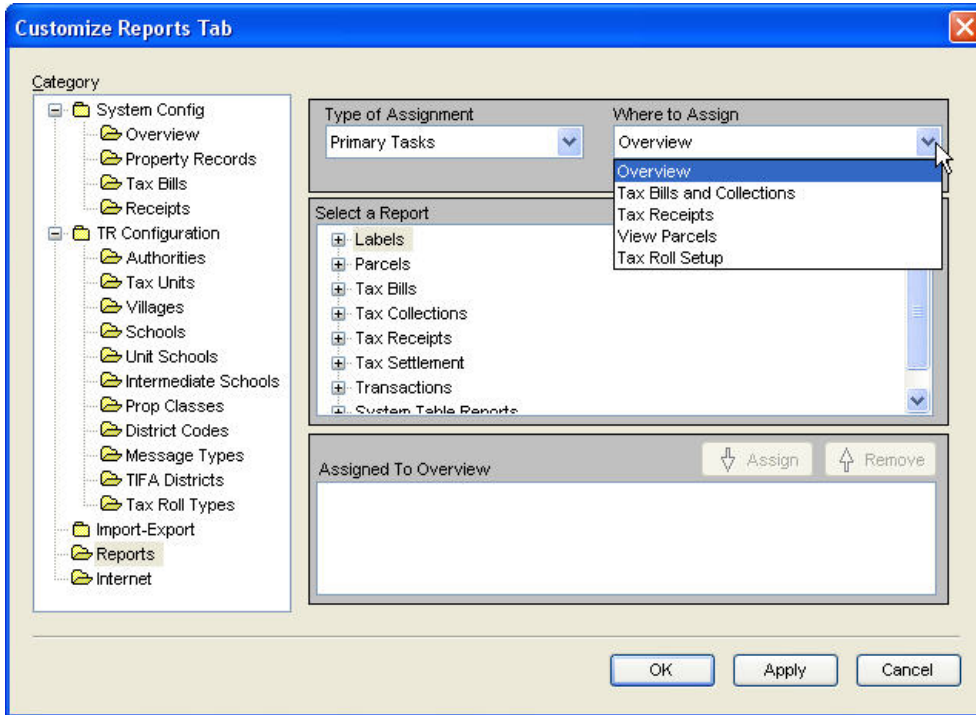
A wonderful feature that has become a Pontem Software standard is the ability for the user to customize the **Reports Tab** for each **Primary Task**. When the Pontem applications are installed, the report tabs are empty. This document will describe how to configure the system preferences to define a list of reports for the Reports Tab, that are user selected.

Select **Edit|Adjust System Preferences|Reports**



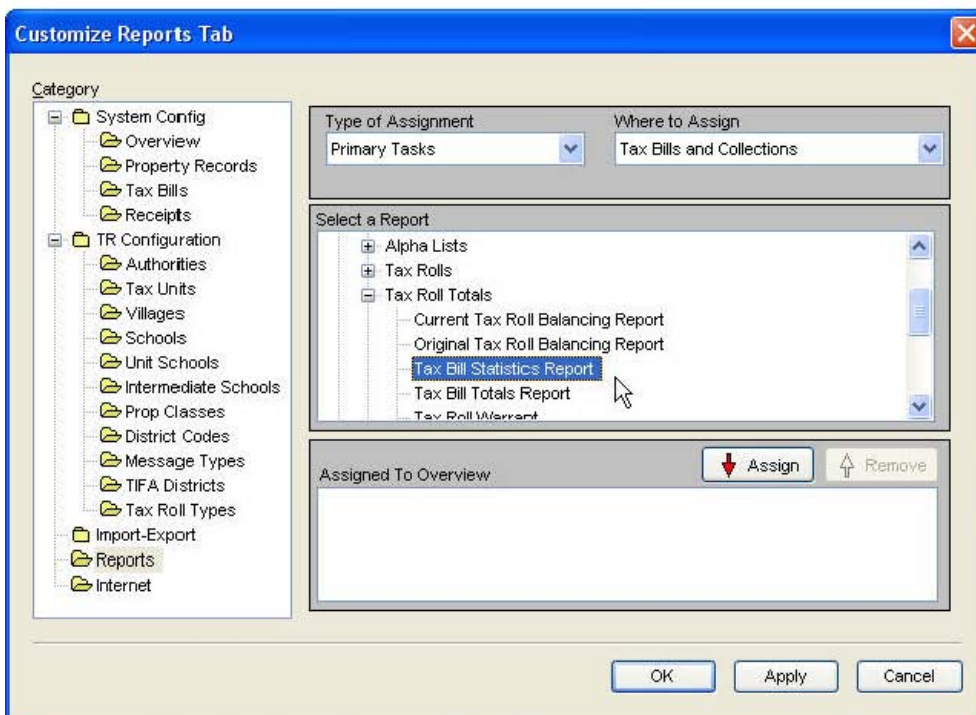
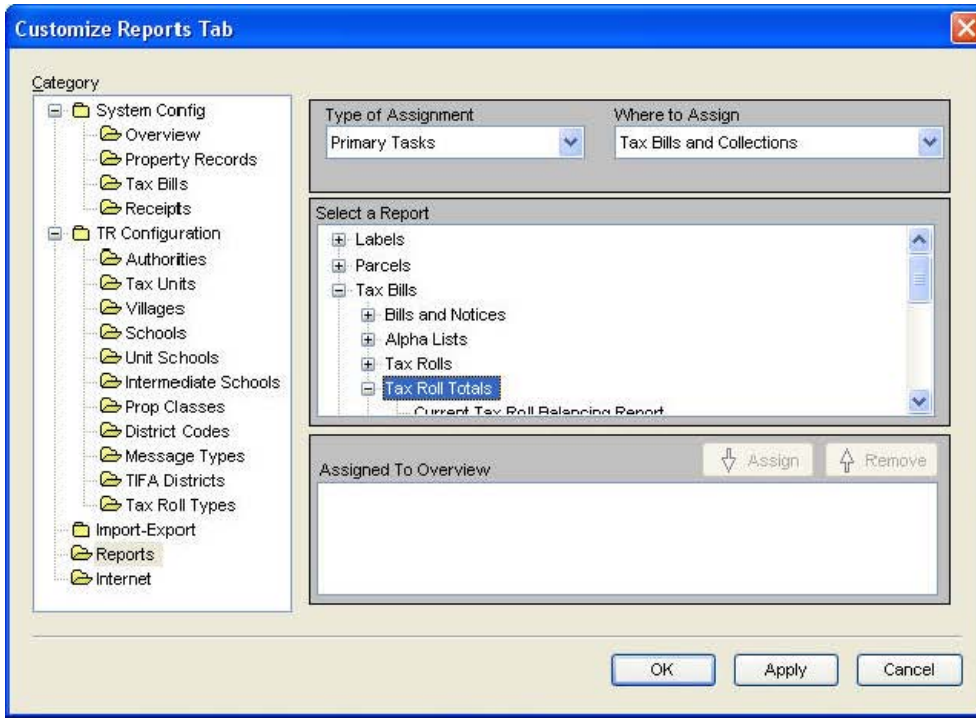
Click the "Type of Assignment" drop-down menu and select Primary Tasks

Click the “Where to Assign” drop-down menu from the middle of the window and choose which task you would like the desired reports to associate with.

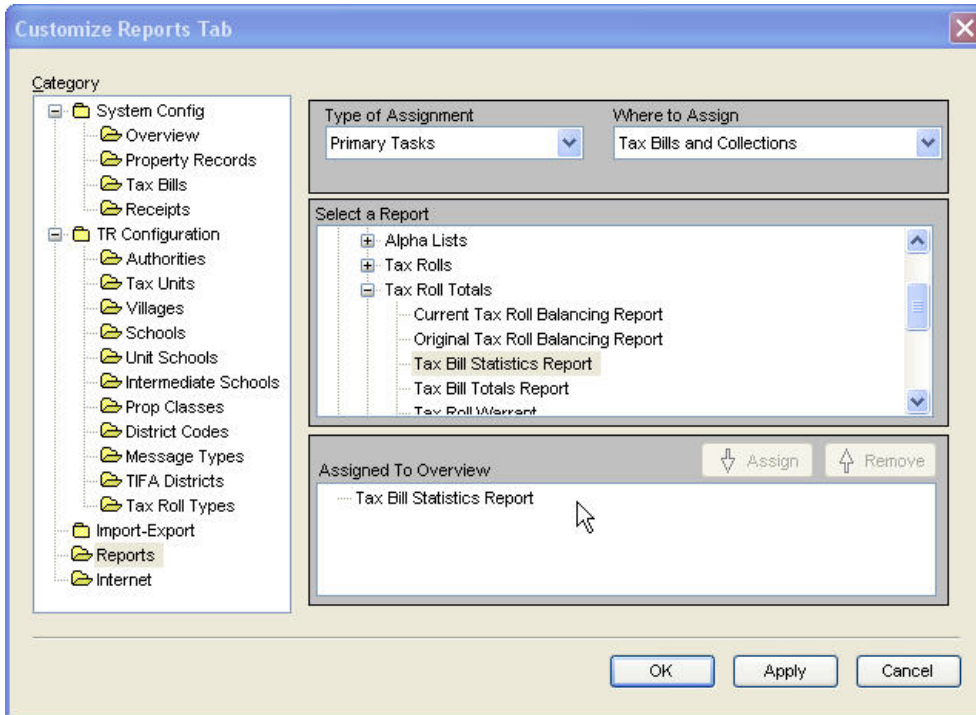


Select the desired report from the top window labeled “Select A Report”

In the Select a Report window, the screen displays a 'tree view' of available report nodes. The nodes listed above are closed, and they are basically folders that contain multiple reports. By clicking on the + next to a node, you will display all of the available reports in each node. You can tell when a node is open because there is a minus sign next to it on the left.



Click the “Assign” button located in the middle of the window to add the report to the bottom window labeled “Assigned to Tax Bills and Collections”



Click the OK button to save the settings

Choose a **Primary Task**.



Select the **Reports Tab** to view the newly assigned reports.

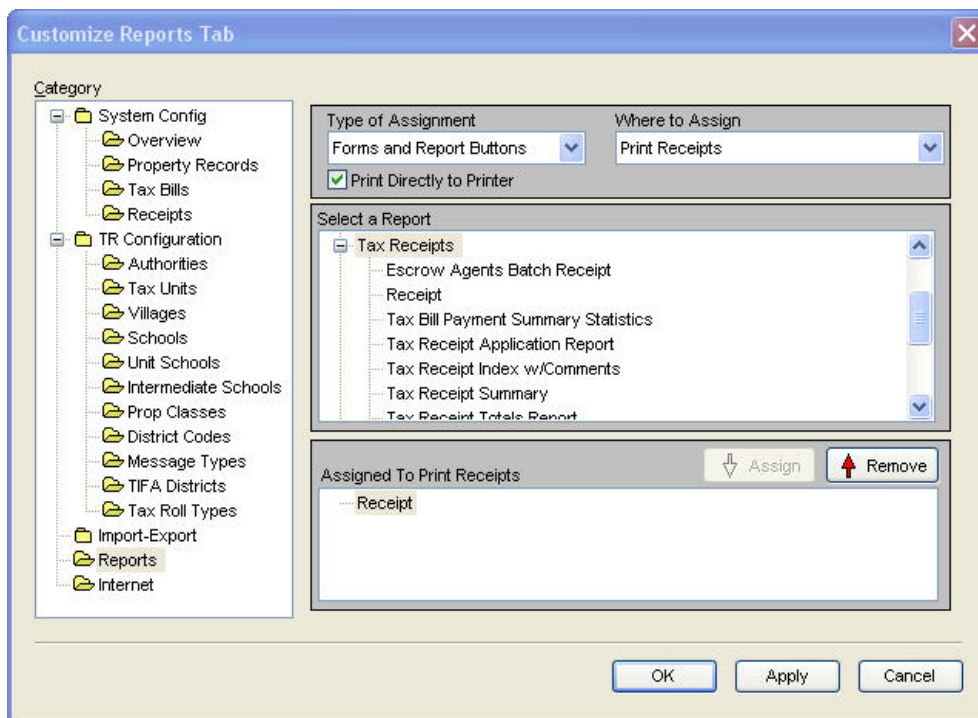


You may also associate Receipts and Tax Bills to the Print button within the application by selecting "Forms and Reports Buttons" from the "Type of Assignment" drop-down menu.

Click the "Where to Assign" drop-down menu from the middle of the window and choose the task you would like the desired "Print" buttons to associate with.

If you would like to avoid seeing a print preview of your receipt/bill when you print it, you may check the "Print Directly to Printer" box. This will prevent the print preview from being displayed and the desired report will print directly to your printer.

Select the desired report from the top window labeled "Select A Report"



Click the "Assign" button located in the middle of the window to add the report to the bottom window labeled "Assigned to Print Receipts"

Click the OK button to save the settings

In the above example, we assigned the "Print Button" on the "Tax Receipt" Primary Task to print the selected Receipt directly to the printer.

