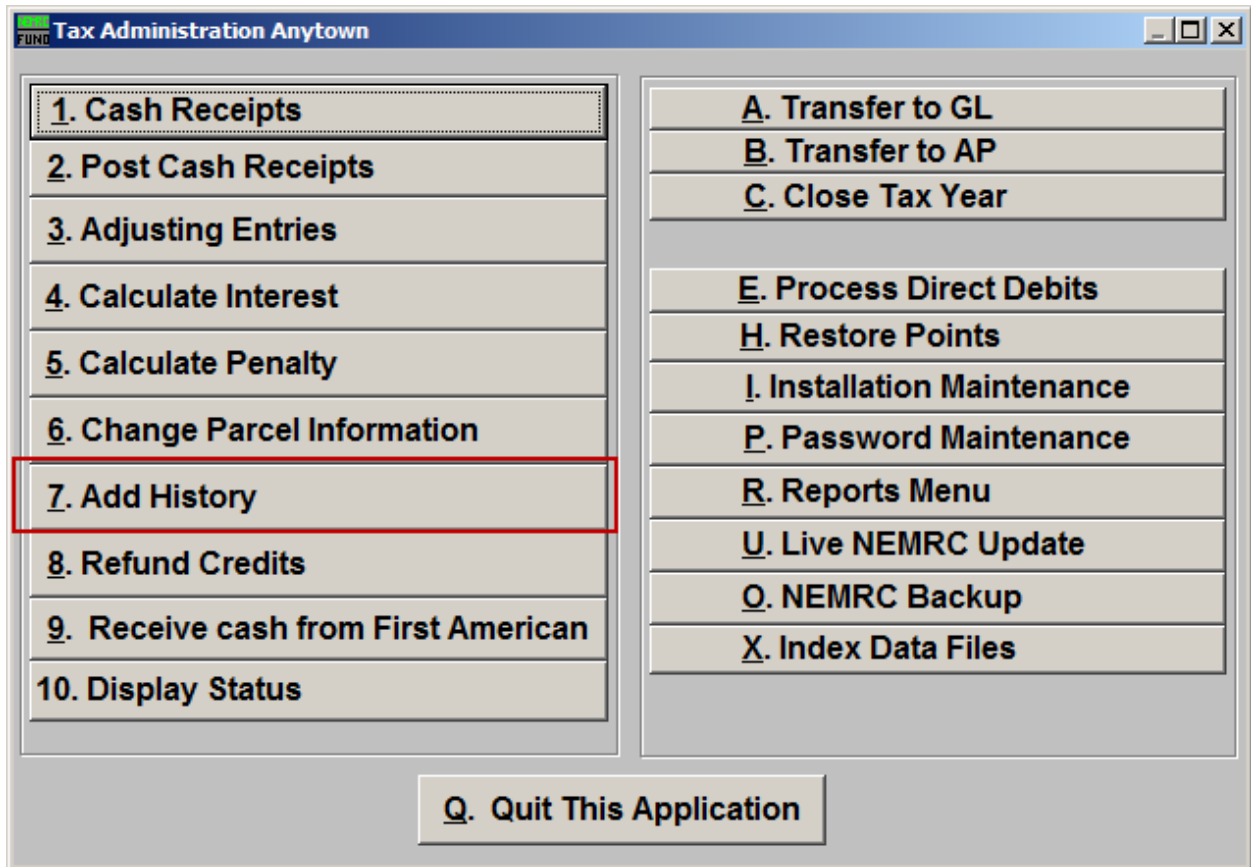


Tax Administration

7. Add History

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Click on “7. Add History” from the Main Menu and the following window will appear:

Tax Administration

Add History

Parcel ID [] - [] **Find** **1**

Name [] **Find**

Tax Year **2** **Find**

General | Miscellaneous | Notes | Agreement | Taxes

Name 1 []

Name 2 []

Address 1 []

Address 2 []

City St Zip [] [] []

Location A []

Location B []

Location C []

Exempt from Interest

Exempt from Penalty

911 Data [] [] []

Grand List []

Property Description []

Homestead []

Taxmap []

Housesite []

Cancel

1. Select the Parcel you are seeking. For additional information on finding Parcels, refer to TA GENERAL PARCEL LOOKUPS.
2. After you select a Parcel, you will need to select a Tax Year. For additional help with finding a Tax Year, refer to TA GENERAL TAX YEAR LOOKUPS.

Tax Administration

The “General” tab

The “General” tab will appear:

Parcel ID 203020005 - Find Tax Year 1990 Find

Name Find

General Miscellaneous Notes Agreement Taxes

Name 1 1

Name 2 2

Address 1 3

Address 2 4

City St Zip 5 6 7

Location A BUILDING AND LOT 8

Location B POND RD 9

Location C 10

11 Exempt from Interest

12 Exempt from Penalty 911 Data 16 0

Grand List 13 0.00 Property Description 17

Homestead 14 0.00 Taxmap 18

Housesite 15 0.00

No Amounts Due

OK 19 Cancel 20

1. **Name 1:** This is the first owners name in last name, first name order.
2. **Name 2:** This is the second owners name in last name, first name order.
3. **Address 1:** This is the first line of the mailing address for the owner.
4. **Address 2:** This is the second line of the mailing address for the owner.
5. **City St Zip: City:** This is the city of the mailing address for the owner.
6. **City St Zip: State:** This is the state of the mailing address for the owner.
7. **City St Zip: Zip-Code:** This is the zip code of the mailing address for the owner.
8. **Location A:** This information is usually place in this field by the listers office.
9. **Location B:** This information is usually place in this field by the listers office.

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- 10. Location C:** This information is usually place in this field by the listers office.
- 11. Exempt from Interest:** Check this box to exempt this Parcel from all interest calculations. This is often used when a Parcel goes into bankruptcy.
- 12. Exempt from Penalty:** Check this box to exempt this Parcel from all penalty calculations. This is often used when a Parcel goes into bankruptcy.
- 13. Grand List:** Enter the grand list value of this property for the Tax Year being added.
- 14. Homestead:** Enter the homestead value of this property for the Tax Year.
- 15. Housesite:** Enter the housesite value for this property for the Tax Year.
- 16. 911 Data:** Enter the 911 locatable address for this Parcel.
- 17. Property Description:** Enter the Parcel description as defined by the listers.
- 18. Taxmap:** Enter the tax map number for this Parcel if there is one defined.
- 19. OK:** Click this button to save the information entered on all tabs. When this button is highlighted by a red outline, then there aren't any amounts due under the Taxes tab.
- 20. Cancel:** Click "Cancel" to return to the Main Menu.

Tax Administration

The “Miscellaneous” tab

Click on the “Miscellaneous” tab and the following window will appear:

The screenshot shows a software window titled "Add History" with a blue header bar. Below the header, there are search fields for "Parcel ID" (containing "203020005") and "Tax Year" (containing "1990"), each with a "Find" button. A "Name" field with a "Find" button is also present. Below these are five tabs: "General", "Miscellaneous", "Notes", "Agreement", and "Taxes". The "Miscellaneous" tab is selected and active. It contains five "Label1" labels on the left and five empty input boxes on the right. At the bottom of the window, there is a red status bar that says "No Amounts Due". Below the status bar are two buttons: "OK 3" (highlighted with a red border) and "4 Cancel".

- 1. Label1:** The user defined labels for these fields are set up under Installation Maintenance.
- 2.** Enter the contents as defined by the label.
- 3. OK:** Click this button to save the information entered on all tabs. When this button is highlighted by a red outline then there aren't any amounts due under the Taxes tab.
- 4. Cancel:** Click “Cancel” to return to the Main Menu.

Tax Administration

The “Notes” tab

Click on the “Notes” tab and the following window will appear:

The screenshot shows a software window titled "Add History" with a blue header bar. Below the header, there are search fields for "Parcel ID" (containing "203020005") and "Tax Year" (containing "1990"), each with a "Find" button. A "Name" field is also present. Below the search fields are five tabs: "General", "Miscellaneous", "Notes", "Agreement", and "Taxes". The "Notes" tab is selected and contains a large text area with a red "1" indicating a user-defined field. At the bottom of the window, a red message reads "No Amounts Due". Below this message are two buttons: "OK 2" and "3 Cancel". The "OK" button is highlighted with a red border.

1. This is a user defined field.
2. **OK:** Click this button to save the information entered on all tabs. When this button is highlighted by a red outline then there aren't any amounts due under the Taxes tab.
3. **Cancel:** Click “Cancel” to return to the Main Menu.

Tax Administration

The “Agreement” tab

Click on the “Agreement” tab and the following window will appear:

The screenshot shows a software window titled "Add History" with a blue header bar. Below the header, there are search fields for "Parcel ID" (containing "203020005") and "Tax Year" (containing "1990"), each with a "Find" button. A "Name" field is also present. Below the search fields are five tabs: "General", "Miscellaneous", "Notes", "Agreement", and "Taxes". The "Agreement" tab is selected and highlighted with a dashed border. The main content area is empty except for a red "1" in the top left corner. At the bottom, there is a red status bar that says "No Amounts Due" and two buttons: "OK 2" (highlighted with a red border) and "3 Cancel".

1. This is a user defined field. The contents of the agreement will appear on the “8. Agreement report,” found on the Reports Menu. The best practice is to establish a pattern for a monthly review of the Agreements Report for follow up. Note who agreed to what payment schedule on what date.
2. **OK:** Click this button to save the information entered on all tabs. When this button is highlighted by a red outline then there aren’t any amounts due under the Taxes tab.
3. **Cancel:** Click “Cancel” to return to the Main Menu.

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The “Taxes” tab

Click on the “Taxes” tab and the following window will appear:

ADD HISTORY

Parcel ID: 203020005 - Find Tax Year: 1990 Find

Name: Find

General Miscellaneous Notes Agreement **Taxes**

	Payment 1	Payment 2	Payment 3	Payment 4
1				
Principal Billed	0.00	0.00	0.00	0.00
Interest Billed	0.00	0.00	0.00	0.00
Penalty Billed	0.00	0.00	0.00	0.00
Other Billed	0.00			
2				
Principal Due	0.00	0.00	0.00	0.00
Interest Due	0.00	0.00	0.00	0.00
Penalty Due	0.00	0.00	0.00	0.00
Other Due	0.00			
3 Credits	0.00			
4 Discounts Taken				
5 Interest Dates				
6 Lien Date				

7 Update GL with these values.

No Amounts Due

OK 8 **9 Cancel**

- 1. Amounts Billed:** Enter the total billing amounts for each type (Principal, Interest, Penalty and Other) by due date.
- 2. Amounts Due:** Enter the net amounts due for each type (Principal, Interest, Penalty and Other) by due date
- 3. Credits:** Enter the amount of Credit balance to start on this account.
- 4. Discounts Taken:** Enter the discount amounts taken if use of discounts have been defined for this Tax Year.
- 5. Interest Dates:** Enter the last interest calculation date the values of interest entered. This is only available when daily interest is defined in Installation Maintenance.
- 6. Lien Date:** Enter the date of lien if the property has been processed. This option is available in New Hampshire sites.

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7. **Update GL with these values:** Check this option to have tax administration post entries to the General Ledger when linked.
8. **OK:** Click this button to save the information entered on all tabs. When this button is highlighted by a red outline then there aren't any amounts due under the Taxes tab.
9. **Cancel:** Click "Cancel" to return to the Main Menu.