

## Printing Statements

WinCollect offers a number of options for printing tax statements, either individually or in batches.

### **Printing a single tax statement**

To print a single statement for a taxpayer, select the taxpayer and from the *Taxpayer Summary* screen, go to the *Reports* menu, and select *Statement*. Printing a single taxpayer statement will show all current year tax issues whether paid or not, plus any outstanding delinquent taxes. Tax Statements can not be printed for prior year current records, or for paid delinquents. To print out a document for these types of records, use the *Account Summary* report.

Tax Statements are generated on demand when you select to print them, so they will reflect the current condition of the taxpayer's records, including current mailing address information and parcel status. Any changes made to these records will be immediately reflected on the tax statement. However, the original tax statement as it was mailed can be viewed by going to *Reports, Statement Options*, and selecting *View Archived Statements*. Note that this feature requires that statement archiving be turned on in your county when the batch printing was done. The archive is stored as a PDF file—if you receive an error while trying to open the file, contact AIS support for assistance in getting the appropriate software installed.

Tax statements can also be emailed to a taxpayer. From the *Taxpayer Summary* screen, go to *Reports, Statement Options*, and select *Email Statement*. The statement will be printed to a PDF file and attached to a new email message. If you already have the taxpayer email address on file, it will be filled in for you. You may now add a subject line and type a message to the taxpayer. Note that this option requires you to use an email program like Microsoft Outlook and does not work with web-based email like Gmail or Yahoo Mail.

To print a statement for a single parcel only, select that parcel in the *Property Summary* screen, and then select *Reports* and *Statement*. If you are viewing a taxpayer and wish to print a statement for just one parcel, double-click the parcel in the property list and it will zoom to that parcel. This option is particularly useful for real estate assigned to mortgage companies.

### **Batch printing tax statements**

To print statements for all taxpayers at the beginning of the year, you will begin by going to the *Taxpayer Search* screen and selecting all taxpayers that you wish to receive a statement.

There are several options that you may want to consider on your search criteria. Often times, counties will set a record filter based on the taxpayer type to only include standard taxpayers. This allows them to filter out special circumstances like mortgage companies and utilities. Any other category of taxpayer that needs special treatment during batch printing can have its own taxpayer type created. Other possible examples would be taxpayers who wish to receive their statement by email or foreign addresses.

Counties wishing to print statements in smaller groups might do their search alphabetically. In the taxpayer name field, you could simply put an “A” and print all taxpayers with a last name beginning with A. Once those statements are printed and mailed, then you could do the B’s, and so forth. If you have multiple printers capable of printing large batches of statements, this is also an easy way to divide the work.

When batch printing statements, you are given the option to exclude \$0.00 tax due statements. This will automatically filter out statements that only contain exempt property or taxpayers that have already paid. Note that even if you select to exclude these statements, the program will still print out statements that are \$0.00 due because of the homestead credit, so that these taxpayers can see confirmation that the credit was in fact applied.

Next you will be prompted for how you want the statements sorted. The options are taxpayer name, taxpayer ID, or zip code. Sorting by taxpayer name is useful to proof your taxpayer assignment process. If while you are inserting statements you discover two consecutive statements for the same person, you can take that opportunity to consolidate their accounts and print a new statement. Printing by zip code may be used in conjunction with reduced rate postage options. Printing in TPID order is the easiest to restart if your printer jams.

To restart a batch in the middle, you must consider the order in which the batch was printing. Look at the last good statement that printed. Go back to your taxpayer search screen and do the search exactly the same way, but add a record filter that is based on the same field that you sorted by, and set the filter to be greater than the value of the last statement. For example, when sorting by TPID, if the last statement was for taxpayer 12345, then you would set a record filter for TaxpayerID > 12345. When sorting by name, do the same thing with the name field, and be sure to type the entire taxpayer name exactly as it appears on the statement to be sure you start with the very next one. Sorting by zip code is a bit tricky because if you are in a group of 5-digit zip codes, you can’t just use the zip code to filter since there are many taxpayers with the same zip code. The proper way to restart this type of batch is to build a filter for zip code equals the zip code of the last taxpayer and taxpayer name is greater than the last statement. This will print a small batch of the rest of that zip code. Then do another batch and say zip code is greater than the last zip code used and you will get the rest of the batch.

### Statement Options

These options in the Global Variables screen influence the statement printing process:

- **Archive Statements to PDF When Batch Printing**—Checking this box turns on statement archiving. If this is currently turned off in your county, please check with Customer Support before activating. The statement archive option requires a substantial amount of disk space, and it may be this was turned off because your server does not have the capacity to handle this feature.
- **Include Site Address on Statements**—When checked, this will cause the physical address of each parcel (when available) to print on the property detail line along with the legal description.
- **Show Total With Voluntary on Statements**—When checked, this will add a final total line to the statements showing the total amount the taxpayer should mail with voluntary taxes included.