

WinCollect Batch Mailing Printing

The batch mailing printing from WinCollect is a several step process that should be done in the following order.

- 1) Search for a list of taxpayers to print statements/notices for in the taxpayer search tab.
- 2) Removing old batch mailings and adding new mailing records from the search results from the taxpayer search tab.
- 3) Selecting print options and printing statements/notices from the batch mailings screen.

The first step includes searching for a list of taxpayers to print statements/notices for in your taxpayer tab in WinCollect. An example record filter to use to bring a list of taxpayers to print is listed below. The filter looks for taxpayers with current year property that is not certified to state. You can enter this record filter using the record filter button on the search screen.

TaxYear=2013 AND Book='C' AND Exempt<>5

Your county may have a more specific record filter to search for taxpayers to print statements/notices for. If you county does and you are unsure of how to apply your record filter, please give our office a call and we will be glad to help.

After specifying your record filter, you will need to then execute the search using the record filter you have specified by clicking on the search button. Make sure you have taxpayers with property unchecked in the search screen.

You will see your search results of taxpayers in the search results grid like the image below.

TPID	TPName	Address1	Address2	City	Sta
1	(ANDREWS, CONRAD L) BATE NANCY	C/O NANCY BATE	5413 N HILS BLVD	NORTH LITTLE ROCK	AR
2	(ANDREWS, CONRAD L) MUSE, JEAN M	C/O JEAN MUSE	2312 TOMHAWK SLAB ROAD	ST JOE	AF
3	(ANDREWS, CONRAD L) ANDREWS DOROTHY	300 TAYLOR ST LOT 10		JACKSONVILLE	AF
4	(ANDREWS, CONRAD L) JOHNSON CONNIE	C/O CONNIE JOHNSON	813 WILDWOOD	SHERWOOD	AF
18	COX PATRICIA ANN INGERSOLL	212 NEVADA 251		PRESGOTT	AF
19	COUCH WILLIAM D & COX PAT	41 COUCH LOOP		NASHVILLE	AF
22	PARSONS PATSY (HEIRS)	C/O TERRY P MOOMJIAN	10491 GOTTSCHALK ROAD	COVINGTON	LA
30	(GARNER DAVID) TIPTON, DESSIE	21366 HWY 17		CLARENDON	AF
44	DENNY SHIRLEY	P O BOX 41		DELIGHT	AF
48	KEEL BOBBIE	P O BOX 473		MURFREESBORO	AF
57	HAYBURN MARIE & LARRY	P O BOX 171		KIRKWOOD	IL
69	PARKS VANCE A & DEBRA SUE	413 KAMBER LN		WYLLIE	TX
77	RHODES KAREN & WILLIS, SHEILA	C/O SHEILA BRANDT	304 E ACADEMY SEND 2 STM	PARIS	AF
100	SKAGGS JUDY	147 CENTRAL RD		ARKADELPHIA	AF
116	FIRST BAPTIST CHURCH	500 S WASHINGTON		GLENWOOD	AF
117	FIRST BAPTIST CHURCH M'BORO	P O BOX 411		MURFREESBORO	AF
120	FIRST UNITED METHODIST CHURCH	225 SOUTH MAIN STREET	P O BOX 1750	FT WORTH	TX
129	ACME BRICK CO	ACCOUNTS PAYABLE		AMITY	AF
133	ADAMS CHARLES FLETCHER & PEGGY	4501 MEADOW HILL		MCKINNEY	TX
141	ADAMS JERRY L & MARIBETH	917 PALESTINE RD		KIRBY	AF
146	BARRETT JARRETT	900 W DE QUINCY AVE		DEQUEEN	AF
153	AKIN ROY J	C/O WALLACE ALEXANDER	P O BOX 38	DELIGHT	AF
154	ALEXANDER BURNHAM (HEIRS)	C/O F EDWARDS	1630 WASHTENAW AVE	YPSILANTI	MI
155	ALEXANDER ELLA MAE, F COOPER, M	3660 HWY 381 S		DELIGHT	TX
164	ALFORD CARLOS W	P O BOX 695		GLENWOOD	AF
169	TATUM ALLEN NELDA	P O BOX 2177 ONE ALLTEL		LITTLE ROCK	AF
174	ALLIED TELEPHONE CO	35 MARIN AVE		SAUSALITO	CA
181	ALL TEL ARKANSAS INC	161 BENNY RD		MURFREESBORO	AF
186	AMIS MILDRED M 1985 TRUST				
189	ANDERSON BENNIE				

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The next step is accessing the batch mailing module to remove old batch mailings from the previous year and adding batch mailing records from your taxpayer search results. To access the batch mailing module, choose *Batch Mailings* from under the *Reports* menu. The batch mailing module should appear on your screen like the image below.

TPID	Taxpayer Name	Printed	Archived	Pages	Tax Due
102181		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
100999		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
101125		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
18234		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
101600		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
100578		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
100518		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
100335		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
102525		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>
6653		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>

To do batch mailing of statements, the drop down option box from the upper left should be selected on Statements. To print Delinquent Notices, the option should be selected on Delinquent Notices.

To remove prior batch records from the previous year, make sure the Printed, Archived, and Taxes Due are set to ALL from the drop down dialog choices in the middle portion of the screen. Also, make sure your Page Count Minimum is set to 0 and Page Count Maximum is set to 11+. After all the options are set like the previous above image, you will need to delete all the records from the grid if you have any that appear. To remove the records, choose the Delete button and then choose the Delete All Batch Mailings option. **NOTE: Prior batch mailings are to be deleted only once a year.**

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After all of the prior batch mailings have been removed, the next step is to add new batch mailing records using the taxpayer search results from your taxpayer tab in WinCollect.

To add new batch mailings, click on the *Add TPIDS* button and choose *All Taxpayers From Taxpayer Search* option. A new list of batch mailing records will appear in the grid.

There are several options in the middle of the batch mailing program like the image below.

The screenshot shows a control panel with the following elements:

- Printed: <ALL> (dropdown)
- Archived: <ALL> (dropdown)
- Page Count Minimum: 0 (dropdown)
- Page Count Maximum: 11+ (dropdown)
- Taxpayer Name: (text input)
- Sort: TPName (dropdown)
- Taxes Due: <ALL> (dropdown)
- Print Coupon:
- Lock:
- A blue question mark icon is located to the right of the Taxes Due dropdown.

The Printed option filters the grid results to whether if they are marked printed or not printed. Selecting the ALL choice will list records regardless if they are marked printed.

The Archived option filters the grid results to whether if they are marked as archived or not archived. Selecting the ALL choice will list records regardless if they are marked archived.

If your county prints statements in the order of the number of pages a statement/notice has, the Page Count options filter the results grid by the number of pages a statement/notice record has. You must first calculate the pages of all records before using these option choices by selecting the calculate button in the toolbar at the top of the window.

The Taxpayer Name field is a field where you can filter out grid results by the name of a taxpayer. Some counties may want to print by the first letter of a taxpayer. You can type the letter for the taxpayer and then click on the records in the grid to get a list of only taxpayers with the first letter.

The Sort option allows you to choose the sort order of how the statements/notices print from your printer.

The Taxes Due option allows you to filter the grid results to only statements/notices who have a balance due or not. Selecting the ALL option will list all statements/notices regardless of their balance. **NOTE: Statements with property that have a zero balance due, but which have a homestead credit that covered the total balance will be included if selecting the YES option.**

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The Lock checkbox option will restrict the batch printing options from being changed if selected.

The Print Coupon checkbox option will include a three part payment coupon page to where the taxpayer can pay the total tax due in partial payments.

An example option settings to list all batch statements/notices that have not been printed, archived, and no specific page count sorted by the taxpayer name with taxes due is listed below.

Printed=NO
Archived=NO
Page Count Minimum=0
Page Count Maximum=11+
Sort=TPname
Taxes Due=YES

To print or archive the grid results, you can choose the print button or archive button from the toolbar at the top of the window. It will give you three options to print or archive from. If you choose Selected, it will only print or archive the highlighted/selected record from your results grid. If you choose the Custom Count option, it will print/archive only the number of records specified in the count. **NOTE: You must have Printed or Archived options set to NO to keep records from being repeated if selecting the Custom Count option.** By selecting All Records In Grid option, it will print/archive all the records listed in the grid.

The Locate toolbar option lets you search for a particular taxpayer record in the batch mailings to see if it is included in your list to be printed or archived.

The Reload button just refreshes the grid results.

If you still have questions with searching for taxpayers to print statements/notices for, removing and loading batch statement records from your taxpayer search screen in the batch mailing module, or which options you should choose in the batch mailing module, please do not hesitate to give us a call. We will be glad to assist you in getting your batch mailings started.