



WinCollect

Version 1.12

A Selection of Time-Saving Tips and Shortcuts

Application Screen

Shortcut

Taxpayer Summary

Execute a search using the current criteria	Page Down
Switch to the Property Summary Screen	F2
Open the Payment Screen	F3

Property Summary

Execute a search using the current criteria	Page Down
Switch to the Taxpayer Summary Screen	F1
Open the Payment Screen	F3

Payment Screen

Perform a parcel search in the Payment List	Type the Parcel #
Zoom to Transactions Summary for the selected parcel	Z or z
Zoom to Assessment Summary for the selected parcel	A or a
Mark All Parcels for payment	F5
Mark All Parcels for payment (Include Voluntary)	Control + F5
Mark selected parcel for Full Payment	Space Bar
Mark selected parcel for Full Payment (Include Voluntary)	Control + Space Bar
Mark selected parcel for 1/4 Payment	F4
Mark selected Current parcel & include Penalty	C or c
Unmark all selected parcels	F8
Close the Payment Screen	Esc

Payment Details Screen

Advance payment date forward 1 day	+
Regress payment date backward 1 day	-
Close the Payment Details Screen	Page Down

Process Payment Screen

Move between fields	Enter
Move between fields	Tab
Use Fast Comments from the Fast Comments Lookup Table	F1-F12 (if assigned)

Receipt Lookup Screen

Execute a search using the current criteria	Page Down
Close the Receipt Lookup Screen	Esc

Application Screen	Shortcut
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Refund Screen	
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Move between fields (does not include search grid)	Enter
Move between fields (including search grid)	Tab

Void Screen	
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Move between fields	Tab
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Zoom Transactions Screen	
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Close the Zoom Transactions Screen	Esc
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Assignment Screen	
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Assign to the currently selected TPID	F10
Search using the current criteria	Page Down
Undo assignment (immediately after assigning only)	F10 a 2nd Time
Close the Assignment Screen	Esc

Taxpayer Edit Screen	
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Move between fields	Enter or Tab
Use Fast Comments from the Fast Comments Lookup Table	F1-F12 (if assigned)
Save edits	Page Down
Close the Taxpayer Edit Screen	Esc

Property Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Use Fast Comments from the Fast Comments Lookup Table	F1-F12 (if assigned)
Save edits	Page Down
Close the Property Edit Screen	Esc

Short/Over Adjustment Screen	
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Save edits	Page Down
Close the Short/Over Adjustment Screen	Esc

Change Slip Administration Screen	
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Search using the current criteria	Page Down
Close the Change Slip Administration Screen	Esc

Application Screen	Shortcut
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User Security Edit Screen	
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Save edits	Page Down
Close the User Security Edit Screen	Esc

Banks Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save edits	Page Down
Close the Banks Lookup Table Edit Screen	Esc

Delq Penalty Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save edits	Page Down
Close the Delq Penalty Table Screen	Esc

Entities Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save edits	Page Down
Close the Entities Lookup Table Screen	Esc

Exempt Codes Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save edits	Page Down
Close the Exempt Codes Lookup Table Screen	Esc

Fast Comments Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save Edits	Page Down
Close the Fast Comments Lookup Table Screen	Esc

Application Screen	Shortcut
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Millage Rates Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save edits	Page Down
Close the Millage Rates Lookup Table Screen	Esc

Taxpayer Types Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save edits	Page Down
Close the Taxpayer Type Lookup Table Screen	Esc

Stations Lookup Table Edit Screen	
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Move between fields	Enter
Move between fields	Tab
Save edits	Page Down
Close the Stations Lookup Table Screen	Esc

View Scanned Checks Screen	
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Close the View Scanned Checks Screen	Esc, Enter, Page Down
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Searching Tips

When searching from the Taxpayer Summary or Property Summary screens, browse the search results in the grid to a taxpayer or property, and skip the summary screen and jump directly to the Payment Screen by pressing F3.

Searches for property outside the current collection year that have been paid in full should be done using the Property Search screen. Remember to set the Search History option to active in order to see the full set of search results that match the criteria entered.

Paste Parcel List located under the File menu option can be used to create a set of search results from information that was obtained from an external application. To use this function, create a list or column of parcel/ppan numbers in an application such as Excel or Notepad, and select the list and use the copy function in the program where the list was created. In WinCollect, choose the Paste Parcel List option, and the Property Summary Screen will display the matches between the list and the tax books. Remember to enable the Search History option if you are doing a search for prior year current records or delinquents that have no balance due.

Searching Tips continued

When using the Taxpayer Search screen, the checkbox titled "***Taxpayers with Property***" will remove all taxpayers from the search results who do not have property assigned in the current collection year, or a delinquent property with a balance due. Property records from the current collection year will always be visible. Delinquent parcels behave differently, taxpayers with only delinquent records will NOT be displayed once all delinquent balances are paid in full. When looking at the Taxpayer Summary screen, if property records are visible then that TPID would be included in search results when the Taxpayers with Property option is checked. *If the Taxpayer summary does not contain any property records that TPID would not be included in the search results.*

When using the Property Search Screen, the ***Search History*** option can be used to search the current tax book from a previous tax year, or to locate delinquent records that have been paid in full. When a delinquent record is paid in full, the property record will not be visible unless the Search History option is active. Current tax book records from a prior collection year will not be visible unless the Search History option is checked. *When a current tax record from the current collection year is paid in full, for the remainder of the current collection year, it will remain visible in the search results without this option being checked.*

The following punctuation symbols can be used on most search screens to create more advanced searches without the use of record filters.

% Text searches can be made more specific by using the wildcard %. The % tells the application to ignore anything in the search field that does not match the search criteria entered by the user. To search for a taxpayer whose Name contains a last name Smith, and first name name Joe, use Smith%Joe% The wife's name Linda could be added to create a more specific search, making the search string Smith%Joe%Linda%

; To use a single search to find multiple criteria in one field, the ; can be used to create a search list. Entering Smith;Jones;Roberts in the Name field would return search results that began with any of those last names. Entering 34678;56842;99754 in a TPID field would return the results that only matched those exact TPIDS.

Searching Tips continued

➤ The > can be used to search for items greater than the search criteria. A search in the Name field formatted as > Smith Ba would return all results that started with the search string and continue on through the end of the alphabet. Smith Barry would be included in the results, but Smith Allen would *NOT* be included in the results. A TPID search with the criteria >4512 would return the results where the Taxpayer ID is 4513 or larger. If the criteria were entered as >=4512, then 4512 would be included in the search results as well. *The = sign is not necessary when doing searches on text fields.*

◀ The < can be used to search for items less than the search criteria. A search in the Name field formatted as < Smith Be would return all results that starting with the beginning of the alphabet and ending with the search string. Smith Barry would be included in the results, but Smith Ben would not be included in the results. A TPID search with the criteria <4512 would return the results where the Taxpayer ID is 4511 or smaller. If the criteria were entered as <=4512, then 4512 would be included in the search results as well. *The = sign is not necessary when doing searches on text fields.*

■ The : can be used to search for results that fall between 2 search criteria. A search in the Name field entered as Smith:Taylor would create a set of results that started with name Smith and continue alphabetically to end with Taylor. On a TPID search, 4512:5000 would return all the TPIDs starting with 4512 and ending with 5000.

Notes: