

# **Tax Tracker 2008**

## **Introduction**



Welcome to Tax Tracker 2008 provided by Hapeman Software Solutions. This program is designed to assist the tax collector in the processes of collecting tax bills and recording the information back to the taxing body.

Since Tax Tracker is a customize product, this program goes through many upgrades during the development of the software. These upgrades are based upon recommendations from our users, new functionality created by the development team, as well as any internal corrections for defects, security and performance.

Below is the support information for your convenience:

Hapeman Software Solutions  
761 North Cottage Rd  
Mercer PA 16137  
Office: (724) 376-2239  
Fax: (724) 376-2289  
Office Hours: Monday – Friday 9am to 5pm EST.

## Performing and Upgrade

Each of our paying customers get a personalized web page where the user can perform upgrades, obtain support information, as well as various additional options that get created. To go to your web page, use the following URL address in your web browser.

[http://www.hapeman.com/taxtracker/\[YourNameHere\]/index.asp](http://www.hapeman.com/taxtracker/[YourNameHere]/index.asp)

example:

<http://www.hapeman.com/taxtracker/DavidHapeman/index.asp>

Tax Tracker also has the ability to automatically go to your web page from the help facilities which will be discussed later in this document.

Step 1: Removing the Software (Only needed if Tax Tracker is already installed on your computer.)

1. Click on Start
2. Click on Control Panel
3. Double Click on Add/Remove Programs
4. Click on Hapeman 2008 Tax Tracker and Remove

Step 2: Go to your personal Web Page (see personal web page specifications listed above)

Step 3: Loading the program.

1. From your web page click on **Program**
2. A new popup will occur, Click on run.
3. Follow the on screen instructions. (Appendix A for detailed screen shots)

#### Step 4: Downloading Database Data

**(ONLY PERFORM THIS FUNCTION IF YOU ARE IN DIRECT CONTACT WITH A HAPEMAN SOFTWARE SOLUTIONS REPRESENTATIVE)**

1. From your web page RIGHT click on **Database Queries**
2. Click on Save Target As ...
3. You have to save the file in:  
C:\  
Program Files  
Hapeman  
Tax Tracker  
Data

If the file already exists, click ok to replace.

4. When the download completes, click CLOSE

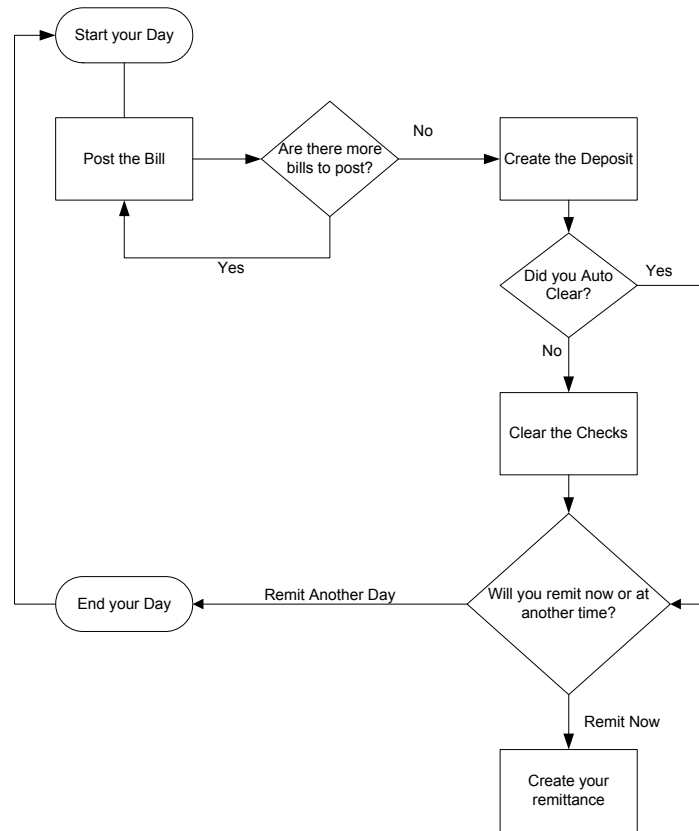
#### Tax Tracker Flow

Tax tracker has a specific flow to the posting and tracking process. Understanding this flow is essential to the user for understanding where in the process specific parcels currently reside.

The general flow is as follows:

1. Posting Parcels
2. Creating a Deposit Slip
3. Clearing the Deposited Checks
4. Remitting the Money to the Taxing Body.

The flow chart below describes the Flow process in detail.



Terms:

Each part of the flow has an assigned number. Listed below are those numbers

- 0 (zero) – The parcel is Unpaid
- 1 – The parcel has been Posted but not deposited
- 2 – The Parcel has been posted and the check deposited however the check has not been cleared
- 3 – The Parcel has been posted, the checked deposited and the check has cleared
- 4 – The parcel has been remitted.
- 5 – The parcel was paid however the check was returned NSF and is now considered Unpaid.

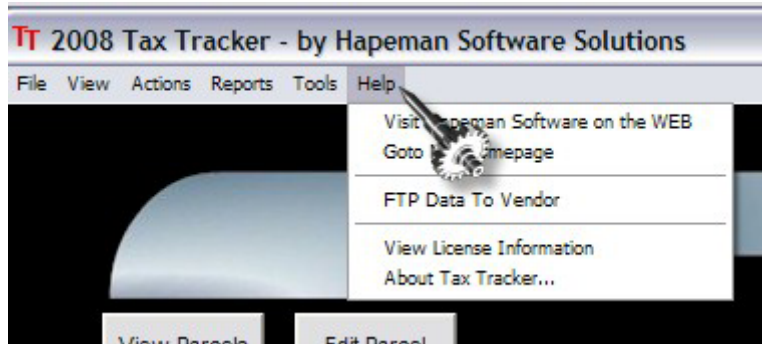
So based on the flow, you go from assignment number 0 to 1 to 2 to 3 to 4. When you have reached the fourth step in the flow, the parcel is considered completed. You cannot for example remit (step 4) any items that are not in step 3 (Cleared). So, those items in 0, 1 and 2 will not be displayed on the remittance screen until they have reached step 3.

## Terminology for future discussions

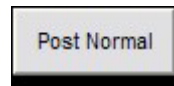
**Forms / Dialogs / Windows** – These are the screens that are displayed to the user in tax tracker that perform specific functions in the system. For example, the Main Window is shown below:



**Pull Downs** – On certain windows, there are pull down screens to perform additional functions. These pull downs are located on the top of each window displayed. Note that not all windows have pull downs. In the example below, the main window shows pull downs for File, View, Actions, Reports, Tools and Help. To activate a pull down and see the contents of the pull down, left click on the appropriate item.



**Buttons** – Buttons in Tax tracker are located throughout the program. These buttons perform various actions within the system. Each button is described in detail for what its purpose is for at the appropriate point in the documentation. All buttons are grey in background and are activated by left clicking on that button.



**Textboxes** – Throughout Tax Tracker, there are fields that need to be filled in by the user. These fields are textboxes. The user will type appropriate information in these fields. The needed information is described further within the documentation.

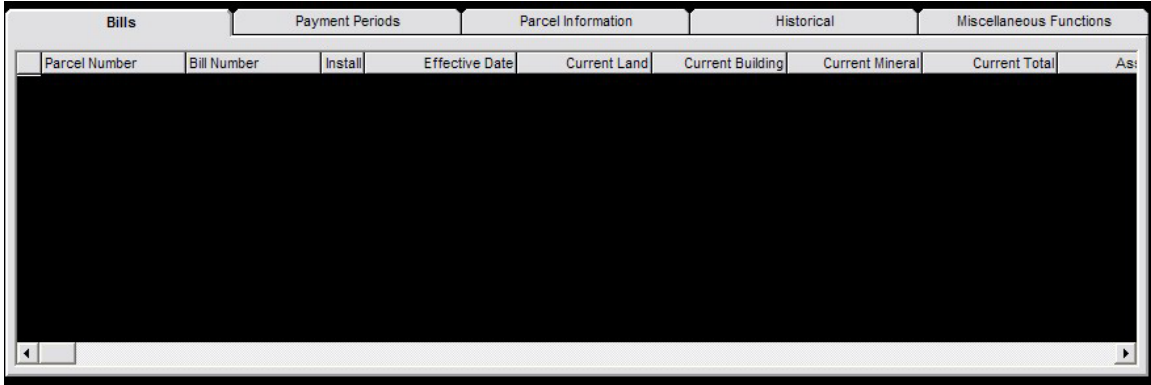


**Drop Downs** – In various places in the program, there are drop down lists that request a limited number of choices for the user in which the program is expecting only one choice from the user. They always look like a textbox with an arrow pointing down on the right hand side. To make a selection, left click on the down arrow and then left click on the appropriate choice.



Note: In all the places where a date is required, this appears to be a special type of Drop Down. When clicking the down arrow, a calendar is displayed for the user to choose a specific date and will pre-populate the information for the user. This will be demonstrated throughout this document.

**Tabs** – In certain windows of the program, there are places where it appears to be tabs that hold specific information. These tabs resemble the tabs of a file folder. To view the contents of the tab, left click on the tab that you wish to view.




**Grids** – In specific places throughout the program, grids are used to detail information to the user. These grids resemble Microsoft Excel Spreadsheets with rows and columns. Most grids can be tailored to the needs of the individual user. This process is described in later chapters.

The necessary functions, if any, for the grids are detailed as the documentation unfolds.

Tax Group & Types		
Group	Type	Sel
School	School	<input type="checkbox"/>

**Record Selectors** – Record Selectors are buttons that appear at the left of each row of a grid. Generally, record selectors use the first grid to select the row (or record) on the grid and then a double click, right mouse or right double click invokes a specific action. Refer to the appropriate section for what each grid will accomplish.

Customize Headings						
	Bill Number	Eff. Date	Ins	Current Land	Current Building	Current Mineral
	01000	7/1/2007		24900	51650	0

←--Record Selectors