Dane County MunicipalityLandNav Training-20250909_110428-Meeting Recording

September 9, 2025, 4:04PM

57m 17s

Speaker 1 started transcription

Speaker 1 0:04
Okay, Sean, the floor is yours.

Speaker 2 0:07
All right, perfect. Thank you. I'm going to go ahead and share my screen. And if you're able to just give me a virtual hands up or just let me know if you can actually see it. Just want to make sure that you can all see my screen. OK, perfect. Thanks, Adam. All right, so we'll get started here.
Started here. So again, as Kelly mentioned, this is going to, excuse me, this is just going to be kind of like a high-level overview on how to navigate the land now system. So it is going to be a little bit of a change from what you're currently used to with the municipal collections program or whatever you might be using.
But it is a web-based software and today's overview is just on on how to to navigate and how to get comfortable with the system. So once you're actually logged into the system, you'll be brought to this page. This is our main landing page in the system. You'll see the Catalyst logo right in the middle of your screen here and below that you have these three different boxes and we refer to these boxes that have this kind of black header here, this bar we we refer to these as cards in the system. So anytime you hear me refer to the term card, that's what I'm.
I'm referring to is this sort of box with this header, this black bar at the top here. So we have these three different cards. We have the My Wams card, we have the My Processes card, and then we have a release notes card. So for any WAMS, WAM messages are messages that have either been assigned to you.
Or that you have assigned to yourself if you're going to be using that functionality. And so any of those will just appear here in this list and you would be able to click on that to navigate to that message just for kind of like ease of access. My processes we'll go through in a little bit later, but from a high level.
In short, this will contain a list of any processes or reports that you've recently run in

the system. So like any reports that are sent into the process queue, they'll be listed here, so you can kind of just access them quickly right from your landing page.
And then finally over on the right we have our release notes card and you can see that we have these hyperlinks here that include the different release versions and if you click on one of these it will open a new tab for you and display that PDF document and from here you can read through it.
You can rint it out if you want, you can download it to your computer, and when you're finished with it, you can just close it out.
On the left side of your screen is the navigation menu. You'll notice at the very top of the navigation menu, right next to where it says Catalyst, you have the hamburger menu icon. When you click on that hamburger menu icon, that's going to collapse that navigation menu and then when you hover over it, you'll see it auto expand.
As my cursor is actually on that menu option. So if you want to save yourself a little bit of screen real estate space here, you can have that collapsed and then it'll just auto expand as you hover over it. Personally, I just keep it static on the left side and so if you click that hamburger menu icon again.
It will just remain static on the left side of your screen here.
And so the navigation menu here is where you're going to navigate through the different areas of the system. You'll notice at the top we have the welcome with our login. I'm currently using our GCS account and your login will say welcome and will reflect your username here.
Below that is your department. Your department is the cash receiving department. Or in other words, it would refer to your specific municipality to which you're linked in the system here. And below that we have our home option. So when you click on the home, it just brings you right back to your landing page here. So if.
For any reason you want it to come right back to your landing page, you can just click on the Home menu option and it'll bring you right back here.
I see we have a hand up. Is there is there a question at this point?

Speaker 1 4:28

I think the hand up is from Linda. If you have a question, if you can unmute yourself.

Speaker 2 4:39

Yeah, if not, that's that's fine, so.

Speaker 1 4:43

OK. Or the hand. Go ahead. Keep watch on.

Speaker 2 4:47

Right below that we have the section for the the my work. Might be a little hard to see with my display right now, but in there we have my Rams and my processes. And again, these are just kind of shortcuts for the cards that we talked about on your landing page. The most important one here that you'll probably want to.

Be aware of is the My Processes menu, which we'll go through in a little bit later. If we Scroll down the navigation page, you'll notice below those two sections we have our main area and there are essentially 5 different modules or different menu settings.

Menu options that you'll be navigating through in the majority of your workflow. So the first one is our cash receipting module and from a high level, cash receipting is the area of the system where you will go to record and process transactions. So in other words.

You'll go to the cash receipting page to process payments in the system. That's really all the cash receipting page is used for. It's not used for any parcel lookups or to print a duplicate tax bill or to check on ownership. Really, it's really just used for processing.

Transactions or payments in the system here.

So just wanted to make that distinction because we've had some confusion in the past from other counties. The bill maintenance menu right below that, that is the primary area of the system where you would navigate to if you wanted to do a little bit more.

Of a deeper dive into any research on a parcel. So if you wanted to check on who owns the parcel, if you wanted to see how much acreage is exists for that parcel record for whatever reason, or if you wanted to potentially review any payments that were made on that parcel record, you could do that through your bill maintenance screen.

Below that you have your Processes menu, and the Processes menu is really used for creating or updating data within the system. So there's several different processes that you will use as you're working in the land NAV system.

And so you can find those in your processes menu. Some of those processes include

things like creating your your cash receiving batches, which we'll talk about in a little bit here. The next menu option is your Reports menu, and it does just what it sounds like.
It's really just where you would go to print or run any reports from in the system. So for instance, like your batch totals report or a payments by selection criteria report, you would access those through your reports menu.
The settings menu is the area of the system that contains the menu options for the overall system configurations. So if you need to check or update like your tax year or your batch numbers or anything like that.
You would do that through the the settings menu here.
You'll also notice that we have this Catalyst help section. So right now we have a limited number of help desk articles in here with some videos. So for instance, you can see like starting a batch and closing a batch. When you click on these options, it'll bring you into this screen where you can.
Review a short YouTube video on that and there will be some instructions here for you. When you're finished, you can click Done. We are working to update this, so there will be more to come in the future on this, but this is a area where you can find a few articles that we already have generated.
And below that is the About section. And really the About section is just where you can go to find the phone number for our customer support team if you ever need it. I think for the most part you'll be contacting Dane County directly or Dane County Help Desk.
But if you ever did need to reach out to us for any reason, our phone number is listed right here in the About section.
At the bottom of the navigation menu, you'll also notice that we have these two icons. On the left you have the little person icon and this is where you can go to update your profile or to configure your profile. And then to the right of that is your logout options. So when you're finished for the day.
You can go ahead and log out of the system by using the logout icon right here.
We'll go ahead and navigate to the profile area of the system.
And in the My Profile page, you have the ability to set your first and last name. So if you needed to update your last name for some reason, maybe you got married and you just wanted to update your last name in the system, you could do that here. You can add or update your e-mail address here as well. So if that ever changes, you can do that.

And you'll also notice you have the option to reset your password right from here. So when you click on that, it'll bring you into this reset password screen. And here you'll be able to enter in your current password, and below that you'll enter in a new password and then you'll just type it again to confirm and as you're creating.
Creating your new password on the right, you'll notice that you have this section here that contains several fields with red X's. As you're filling out the passwords, these red X's will turn into green checks as you meet that criteria, and once you have all green checks, you'll know that you're good to go ahead and save.
O If you never needed to update your password, you can do that right in your profile in the system here.
Below that we have some different themes. At the top we have some original themes such as light, Navy, branded and dark themes. The default is Navy and that's what I tend to stick with, but you can use the radio buttons to toggle between the different types of themes and see which one you like best.
Again, I just tend to stick with the default Navy theme cause I'm pretty boring. But below that we have some expanded themes and I am told that these are loosely based on Wisconsin sports teams. So pick whichever, pick whichever theme you like best.
I've seen some people go for the the hot pink theme. I've seen some go for the blue and gold theme here. So pick whichever theme you like best. This is going to be specific to your own user account, so whatever theme you pick isn't going to impact anyone else's account.
You'll also notice that we have this font size slider as well. So if you need to increase the font size, you can grab this and you can slide it over to the right and you'll notice how the font size has updated. And then if you wanted to decrease the font size on any of the pages, you can drag it all the way over to the left and as you can see it makes it really small so.
I think for this demonstration I'm going to move it all the way to the right, just so that way everyone can actually, you know, see what I'm working with here.
But again, this is specific to your user account, so if you like the default medium font theme, you can go ahead and just leave that where it is.
All right. Before I move on to some of the deeper areas of the system, do we have any questions?
Well, it looks like we have.

Speaker 1 12:23

Yes, there's one from Yep, one from Julie. Will changing font size cause any problems in viewing some screens in full?

Speaker 2 12:32

It it's possible depending on your screen resolution. I would say experiment with the font sizes. It shouldn't cause too many issues, but you can experiment with both the font size and your browser zoom. Because this is a web-based application, you have the ability to zoom.

In and out on your browser as well. So you might want to you might want to experiment with a combination of those different areas just to kind of make sure that you get the the look and feel down that you want.

But I don't believe it should cause any issues if you were to simply just increase that font size.

Speaker 1 13:17

Does anybody else have a question on this section before Sean moves on?

OK. If you think of anything, go ahead and add it in the.

Chat. Thank you. Go ahead, Sean.

Speaker 2 13:35

All right. So the next area of the system that we're going to talk about is the cash receiving module. So in my navigation menu, I'm going to find cash receiving and I can just going to click on that right here.

And so when you go into this cash receiving module, again, this is the area of the system where you're going to come to process or record tax payments. That's really it's only purpose or function is to just allow you to record those tax payments in the system here. So you would not want.

To use the screen for Uh parcel maintenance or or doing a deeper dive into a parcel record.

But you'll notice at the very top of the screen we have some different areas here. So beginning in the upper left corner we have the name of the page, so right or the name of the module. So right now we're on the cash receding module. Next to that you have this breadcrumbs trail. We refer to this as breadcrumbs.

Because if you notice, it leads you back to the the home or the little house icon.
So as you're navigating in the system, you're looking at other pages or other areas of the system. You're going to see this breadcrumb trail specifically listed on each page. It'll just be updated to reflect whatever page or pages you're you're in with those modules.
Just so you kind of know where you are, and you can use this as a means of navigation to navigate back if you need to. You can also use your browser's back functionality as well, depending on where you're at or what you're doing, and you can also just navigate using the navigation menu. So there's several different options for you.
But the bread crumbs trail just kind of lets you know where you are in the system.
Next to that, you'll notice that I have this notification here. It says that my account GCS is not assigned to a batch. So when you're creating or when you're recording payments in the system here, you will need to be assigned to a cash receiving batch.
Now the the frequency or the number of cash receiving batches that you open or forever how long, for however long you want those batches opened is really entirely up to you and Dane County how those are managed. I recommend having a new batch open each day. It just makes balancing.
Easier, but it's entirely up to you how you want to manage your own batches. But in order to process transactions in the cash receiving page, or in other words, in order in order to record tax payments in cash receiving, you will need to be assigned to a batch in the system here.
Once you are actually assigned to a batch, it will display your user account and it'll show you the actual batch number to which you're currently assigned. It'll display that right at the top here. So if you ever need to know what batch you're currently in, you can just navigate right to the cash receiving page and it'll just list it.
U at the top here if you're assigned to a badge.
Now over on the right I have another notification here and this is regarding the the land NAV agent and I believe that Dane County IT is going to be taking care of your land NAV agents for you.
But one thing you'll need to know is whenever you see this notification or whenever you look in the upper right corner here, you're looking for a green agent connection available. As long as you have that green agent connection available message, just think of it as green is good, you're good to go.
So as long as you see up here this is green, you're good. Right now my agent token

is not available because I don't have my agent configured, so I wouldn't be able to process any transactions here.
And then to the right of that is the little agent, the gear icon. So if you ever needed to update your agent key, which I believe this is also going to be something Dane County IT will help with, but this is where you can go to check or to update that agent key or that agent token.
But I'll let.

Speaker 3 17:48
Hey, I'm sorry to interrupt. This is Kay. We don't, we don't force the agent. So we we may not have that set up for them because that it never worked for people. So we don't require the agent.

Speaker 2 17:51
Yes.
Oh, OK, perfect.
OK, perfect. Thank you, Kay. So since the agent is not going to be required for Dane County municipalities, you can completely disregard everything I just said. You don't have to worry about the the agent token here. So even if this message is read, you should be fine to proceed.
Moving on to the rest of the cash receiving page. So you'll notice that we have this Add Items card at the top here. This Add Items card is used as a means of search to help you find things that you want to put into your cash receiving card.
So taking a step back from a high level, you can kind of think of cash receiving as sort of like online shopping. So essentially the general workflow is that you're going to find something, a parcel record for which you want to process a payment and then you're going to add that payment.

Speaker 3 18:58
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Speaker 2 19:03
Into your cart here. Once you have that parcel in your cart, you're going to add your form of payment, in other words, your tender payment. And then when you're ready to complete that transaction, you will then check out.

O You can kind of think of it like online shopping. You're going to search or add items to your cart. Then you will add your form of payment.
And then once you've got everything set up and you're ready, you can click check out to complete that transaction.
Now in this add items card at the top here you have the ability to configure these different fields here. So you notice right now I've got account number, I've got property address, I've got last business, first name and I've got a bill type drop down if I wanted to switch this up.
I can do that by clicking the gear icon here directly to the left of the search button here. So when I click on this gear icon that will bring me into this customized search screen where I can turn the different fields on or off as I want.
So you'll notice for each of those different fields in the upper right corner I have this toggle. So when it's over on the right and it has the check mark in it, that means that field is currently on and you can see some things like the mailing address and the municipalities. Those are currently off because they're slid over to the left with the the X.
So if I wanted to, I can turn on that mailing address and let's say maybe I want the mailing address and maybe I don't need the property address. So I can turn that mailing address on, I can turn that property address off, and then if I want to, I can also rearrange these fields into whatever order of.
I want by simply dragging them and dropping them into whatever position. So if I wanted to move mailing address closer to the beginning, I can do that. If I want to move property address to the end, since it's off, I can do that. If I wanted to turn bill type off, I could also do that.
And if I wanted to turn municipalities on and move it closer to the front, I can do that as well. So you can kind of rearrange this however you want, whatever's going to work best for you and your workflow.
Once you've got your settings the way you want them, you can click Save and that will apply your changes on your search screen here.
Another thing to note is that as you're searching in the system, you can't. You do have the ability to search using wildcards, and wildcards are denoted by the percent symbol. So for example, if I wanted to search for the last name of or if I wanted to search for the mailing address.
Maybe I know it's on a street, but I don't know the beginning.
Of that I can do percent St. and that'll look for anything with a anything like maybe

3rd St. or 1st St. It'll look for any of those types of streets, for example, right? Or for a last name of Smith, I can type percent.

Speaker 3 22:01
I 1 I

Speaker 2 22:16
SMI percent and it'll just grab anything that has that three string SMI in that last or business name field.
And when you're searching in the system, you can use some or all of the fields depending on how deep or how refined you want your search to be. When searching in the system, I like to use the old adage less is more.
And what I mean by that is the less information you put into your search, the more results you're going to get back and vice versa. So for example, if I try to restrict my searches to a specific municipality for maybe just a John Smith.
And I click search, I may not get any results back, but I can broaden my search by just maybe searching for the last name and not even restricting to my municipality. And you'll see the search is taking a little bit longer to execute because it's looking through all of the records to find any.
Anyone with the last name of Smith or the business name of Smith, and it might take a second to generate that list of results, but you can see kind of how less is more, so it's going to generate a broader list of results when it does.
Get that information back.
So rather than making you sit and wait here, let's try just doing a John Smith and see how many John Smiths we have across Dane County. OK, so we have a few, but you can see again, less is more. So once you have conducted your search.
Uh, you'll have this list of search results here.
And in this list of search results, there are a number of different columns. So the first column is your alert column, which may or may not be applicable to you. Really, this just lets you know if there's any WAM messages associated with that particular record.
The next column over is your bill type, and for the most part you're going to be working with real estate taxes, so it'll always be real estate taxes. The next column over is the account number, which.
I believe. Please correct me if I'm wrong. I believe this might be the bill number.

Then that is followed by the reference column. The reference column you'll notice contains 3 distinct pieces of information. So the first piece of information is going to be the tax year. So you'll notice the reference column will always start with the tax year as the 1st 4 digits.
So if you're looking for a 2024 record, you'll notice that it's listed here in the reference column. The 1st 4 digits are 2024 and then that will be followed by your parcel number and then followed by the owner of that record.
Next is your owner column, followed by the amount actually due, and then you can see the mailing address, the property address and the municipalities. So again, once you have found the record that you want to add to your cart, let's say John Smith came up to the counter. I'm ready to add his record to my cart. I can.
Check the check box here.
To select this record and then I can add that record to my cart and I'm not actually able to right now for that, but you would then be able to add that record into your cash receiving cart here. It's because I am tied to this treasurer's department. That's why I'm not able to.
If you need to reset your screen, you can do that by clicking this reset button here and that will just reset all of your search fields here.
If you also wanted to look for any accounts without a balance for some reason, you can check this checkbox here and that will allow you to include accounts without a balance. So if you're having difficulty finding a record that you need to process a payment on, you can try checking this checkbox and then doing your search.

Speaker 4 26:24
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Speaker 2 26:26
And this will include accounts with a 0 balance in that list of search results as well.
Scrolling down the the page a little bit, you'll notice the next card on the cash receiving module is your transaction card, and this is setting the stage for that transaction. So in other words, you're indicating in this card the payment date or the date on which you're recording that payment.
Has its own field. We also have a field for the interest and penalty date, so if you needed that adjusted, you do have the flexibility to do that. I would recommend just leaving it default unless there are special circumstances which you'd probably want

to reach out to Dane County first before actually changing that.
Next is the receipt copies field. So we have two different versions of receipts. The top receipt copies field refers to the number of cash receipts, and these are more simplified receipts. In other words, it lists out the details of that cash receiving transaction I'm going to.
Just quickly do a test so you can see those.
And so this is a sample of what the cash receipt will look like. So if you wanted to have a cash receipt print for your transactions as you're processing them, you can set that number to one or two or however many copies you want.
You'll notice the cash receipt contains the details of the transaction, so it contains the transaction number. The batch number contains the list of the items being processed as well as the amounts, and you can see the form of tender at the bottom here.
So this is what those cash receipts look like. And then for the tax receipts, these are the sort of, I I would say a little bit more formalized receipts in a way. I'm going to print a test 1.
So you can see what those look like. I'm sure these are the ones that you're going to be most interested in.

Speaker 4 28:54
3.

Speaker 2 29:06
So these are the real estate property tax receipts that you're probably more used to. So if you wanted to have tax receipts print out for each transaction, you would want to ensure that that is set to at least one. You'll see it lists out the details for the transaction at the bottom of that receipt as well.
Well.
The received of field here, even though it is a Gray box, you do have this edit icon and this is really just a means to allow you to indicate who actually made that payment on that transaction. So for example if you get a check from maybe an escrow company.
And you need to change this received up to reflect that, you can click this edit button here and then you can update the information here. And this is what will print out on the receipt to show who actually paid for that transaction. And you'll notice in this field, technically the only field that is actually required is this letter.

Last name field denoted by this little asterisk here. So all of the other fields are optional. You can put in as little or as much detail as you want when filling that out, and that kind of helps to set the stage for that transaction.
Below that is your cart. So this is where all of the different records that you have added from your search that you're wanting to process will be listed. So if you're processing a transaction for say maybe 10 different parcel records.
You can Add all ten of those records into your cart here and they will be available for you to process in a single transaction.
Over on the right you have this tender payment field or tender payment card and here you can adjust the form of tender to be processed. So if you wanted to select cash you can do that or check is the default option you can do that.

Speaker 4 31:06
OK And OK

Speaker 2 31:17
You also have the ability to input a check number here. Rather than having to type it out in the reference field, you can have a separate check number field where you can input that check number.
And then when you are ready, you have the check added. You would then click the Add Payment button to then add that payment into your payments card.
And again, once you actually have that payment set up and you're ready to proceed, you would then click that checkout button. So I'm going to make a quick configuration change here so I can show you this in action. Give me just one second. OK.
I'm going to find a record to add to my cart.
So once you have found that record and you've added it into your cash receipting cart, you will notice here that we have the ability to modify the payment amount if you need to. So by default is going to fill in with the amount of the payment that is due, but you can adjust this payment if you need to so.
So for example, if somebody's making a partial payment, I can click right into this payment field here. So you can see right now it's highlighted blue and I can take that out and I can input a different amount. So let's say that they're going to pay $1000 on this.
If I wanted to, I can update that payment amount to indicate that $1000 payment

and that would show me that I would have a remaining balance leftover 5576 and $0.86 after this $1000 payment is processed.
So then what I can do here is I can add that check.
And then now I can see I've got my cart item and then I've got the payment amount here. I have my transaction set up. I am ready to proceed. I would then be able to click that checkout button to record that transaction in the system. Again, I'm not assigned to a badge, so I won't actually be able to do that, but I want.
I wanted to show you the ability to adjust that payment amount. If you have something in your cart or your payments card and maybe you added something by mistake, you need to remove it. You can do that by selecting the check box for that item and then clicking the trash can icon here to remove it as well.
You'll get this notification. Are you sure you want to delete this item? You can click confirm and that will remove in this case that payment. And if I wanted to remove my cart, I can do that as well by selecting the check box for that record, clicking the trash can.
And it just removes that record from my cart.
Or if I wanted to completely reset my cash receiving page, I can do that at the very bottom by clicking this clear cart button.
So that will just kind of do a forced refresh of my entire cache receeding page.
One other thing that you may run into is a situation in which you need to process some late lottery credits.
And so if you ever run into a situation like that, you need to add a late lottery credit. You can do that by doing your search in cash receiving and add that item to your cart. Oops, forgot I have to do for a specific municipality.
So I can add that into my cart here and then I can use the check box to select that cart item and then I can use the lottery credit button.
I'll get this notification. In this case it's already passed.
But then this will allow me to add that lottery credit. In the event that I ever needed to do that, I could do that. Again, I'm just going to clear the cart to do a full refresh on this.
So um, are there any questions on the cash receiving page at this point?

Speaker 1 35:55
Julie had a question about having first option and full payment option.

Speaker 2 36:02
Oh yes, so let me add something back into my cart here. So you do have the ability to do the the full payment option and the installment option. So when you add something into your cart here, you can select it using the checkbox here and you'll notice.
But at the bottom next to your lottery credit button, you have a full button as well as your installment button. So if somebody's making the full payment, it should default to the full payment amount, but you can always check that. Use that button as well to assist with that if you need to.
Or if you wanted to indicate that they're going to just pay the first installment, you can indicate that there. In this case, it's not really applicable due to the timing. Since you know it's September 9th, there's no first installment at this point, but if there was, you could use that installment button and it would just update that payment amount.
To reflect that first installment rather than the full balance due.
One other thing you're going to notice is that when you have an item in your cart in your navigation menu, you'll see this cash receipting module here contains this little number in the circle, and that just lets you know that there is something in your cart that's waiting for you to actually.

Speaker 4 37:20
1.

Speaker 2 37:21
Process it or do something with it if I were to add something else into my cart.
You'll notice when I add this second item.
That number, that little notification badge updates to reflect the number of items in my cart. So right now I can tell from a quick glance that I've got two items in my cart.
So if you're going through and processing again a a payment from maybe an escrow company that has probably 20 or more parcels.
In it. This will help you keep that running total of exactly how many items you've got in your cart at that point.
Right.

Speaker 4 38:12

Hi, this is Kate. I'm just going to interrupt with one thing. Just so the Dane County Treasurer's know, we're going to focus you a lot more on manual batch entry. You'll you should know cash receiving as well. So this is helpful, but we're really going to focus on getting you to enter stuff in manual batches.

Speaker 2 38:34

OK, fantastic.

Speaker 5 38:36

And and this is Steve Cripps. There's there was a comment out there on the bill number or parcel number. When we set the system up for your collection, you'll be setting it up. We'll be setting it up so that bill number entry is easy. And then when we take over collection in February, I have to do a data conversion to set it up so that we.

Can enter parcel numbers because we no longer have bill numbers after we send out bills. When we send out second installment notices, they don't have bill numbers on them.

Speaker 2 39:09

Okay. Thank you, Steve.

Speaker 4 39:10

And yeah, what that really means, this is Kate again. Sorry. But what that means is then if you don't have the bill number, you're not going to be able to search by parcel number. You're going to have to find some other way to search. And when you get escrow payments, that can be a pain.

But that you're going to have to do it that way.

Speaker 2 39:34

All right. Well, that was everything I wanted to cover on the cash receiving page. So if there are no other questions, I'm going to move on to the bill maintenance screen. So if you're following along with me, we're going to go ahead and move on to bill maintenance. And in this bill maintenance screen, it sort of works in a similar concept

to the cash receiving page. And again, we have our ability to configure our search. Options to make it easier for us, and these configurations are specific to your own user account. I'm going to zoom out just a little bit to adjust the display a little bit better. So for example, on my search screen here you'll notice that I've got these five different cards.
Cards. By default I have the tax information card. I have this owner card, parcel number, bill or certificate number and address. If I want, I can click this gear icon in the upper right corner here and I can be brought into this customized search screen where I can turn those different cards on and off.

Speaker 4 40:31
But.
8.

Speaker 2 40:42
So if I wanted to turn off the parcel number card, I could do that. Or if I wanted to turn off that bill or certificate number, I could do that. I can also rearrange these in whatever order I want, just like I could rearrange the fields on my cash receiving screen.
So if I wanted to maybe put that parcel number at the very first as the very first option, I can do that. And if I wanted to move address more over on the right side of my screen, I can do that.
Once you've got the search screen set U the way that you want it, you can then click save and that will alley your changes here.
You also have this More Search Fields button here. You'll probably never use it, but if you ever needed to, you're welcome to click on that More Search Fields option and see what additional fields are available to you. It does kind of adjust the layout slightly, so you'll notice that you have your municipality drop-down and your your tax year range at the top now.
If you Scroll down a little bit further, you also have a new field here, the Plat, Block, Lot and Public Land Survey. I don't know how many of you will actually ever use that field, but it is here if you wanted to ever search by that. If you wanted to revert this back to your default, you can just click that.
Button again, it now says less search fields. When I click it, it goes back to more search fields, but it resets it to the default layout that I had.

Speaker 4 42:02

3.

Speaker 2 42:09

Again, when it comes to searching in the system here, less is more. So the less information you put into your search, the more results you're going to get back and vice versa. One of the things I wanted to point out to you was the in the address card. Here you'll notice that the very first field is.

The address and it's a drop down so you can search by the property address or you can search by the mailing address if you wanted to. And again you can just enter some of the criteria. So if you wanted to look for maybe 123 main for example, you could do that and I might not have any.

Oh, I do. And so when you actually are ready to conduct your search, you can click your search button here at the bottom and that will generate a list of results for you here.

Some other things to keep in mind when searching. You do have these three check boxes here as well that you can set. So if you wanted to auto open single results, meaning that if you conduct a search only one result is returned, it'll just bring you immediately into that record so you can check that check box to enable that.

If you wanted to auto add those single results to your cart or your cash receiving page, you can check that checkbox and that will do that. And if you wanted to exclude no balance properties, in other words, if you only wanted to find properties that have a balance, you can check that checkbox and then it will only find records that actually have a.

Balance on it.

In your list of search results at the bottom, you're going to notice a few things, first of which there is a lot of data in this table. So if you notice I have this slider bar at the bottom, I can grab it and drag it all the way over to the right and there is a lot of data in this table.

Most of which may or may not apply to you. So if you needed to adjust the information displayed in your search results, you also have the flexibility to configure this for your own user account as well by clicking the gear icon in the upper right corner of this area.

So when I click on that gear icon, it brings me into this customized columns screen where I have a list of available fields on the left and I have my list of selected or chosen fields on the right. And so for example if I wanted to remove some of those fields that don't really apply to me.

Speaker 4 44:23
A a,

Speaker 2 44:35
I can check the check boxes for those items, for instance, maybe all of like the section - Town range, the plat block lot information, all of that stuff. Maybe I don't really need it, maybe I want to remove it out of my my search results so I can unselect those fields.
I can also reorder these fields in my selected column into whatever order I want by dragging and dropping it into whatever position. So if I Scroll down to the bottom, maybe I want to bring that balance closer to the top. I can grab it and I can drag it up to the top of my list.
Maybe I'll have it right after the property number. I can do that and then once I've got my fields configured the way I want them, I can click save.
And you'll notice that my search results screen has now updated with the information, the columns that I've selected in the order I've selected them.
And if I wanted to, for whatever reason, I can also download this information by clicking this download icon here and that will generate the list of search results into a CSV file for you or an Excel file and you can use that for for whatever you might need it for.
Some other things that you can do on this page if you check the check box for a record.
Scrolling down to the bottom, you also have the ability to add that to your cart by clicking the Add to cash receiving button here. And again, I'm not set up to collect for that municipality right now, so I wouldn't actually be able to do that, but that would be an option for you if you're going to be using the cash receiving page.
And if you wanted to get some more details on a parcel record, you can actually click right on the parcel record anywhere other than the checkbox to actually go in the parcel record. So you'll notice how I'm hovering over these items.
The it's highlighting blue. That lets me know that I can actually click on that record to go into it. So when I click on that record, it will bring me into that parcel screen and

I'll have some additional details for that parcel record here.
So at the top I have some static information such as the property number. I have the municipality. I also have a tax year drop down here as well. So if I wanted to see how that parcel existed back in 2020, I can select 2020 from the drop down and that will bring me into that parcel record as it existed in 2020.
So I can see list of payments or or whatever the case is for that parcel record. If I wanted to jump back to the current year, I can just select 2024. That brings me back to the current parcel record.
You'll also notice we have the bill number, current owner and the property address here as well.
Right below all of the static information are your different tabs. Now, for most of you, you'll probably default to the Taxes tab here, which contains the information specific to that parcel record for their taxes, such as the tax breakdown. You'll have the installments here.
And any payments that have been made on this parcel record, you'll be able to see them in this payments card as well.
Scrolling a little bit further down, I can also see the list of any and all unpaid taxes for this parcel for any tax year on which there are unpaid taxes. So if there are any unpaid taxes, I can Scroll down and see them here.
I also have the ability to print some reports from here as well. If I wanted to print a tax summary from here, I can do that by clicking that reports button, selecting tax summary, and then I'll get my tax summary report print out here.
Some additional tabs that you have access to. You may or may not have access to all of these tabs, but the general tab you should all have access to and this will list out some general information for that parcel, such as the the property card which contains the property information, the municipality, you can see the creation date and so on.
Below that you have the district information and over on the right you have your ownership so you can see the current and former owners of that parcel record. Below that you have your tax address information here.
And then you also have your document history on this general tab.
The Legals tab that will show you the legal information such as the legal description with the parcel acreage. You can see the property descriptions. Again, this contains like your section, - Town and range information. You can also see the property address information on this page here.

And then the Values tab might be another interest of yours where you can see the valuations for that property. So in this case this is a G1 residential and then below that you have your lottery credit section, so you can see the number of lottery credit claims.
And then we also have the specials tab. So if there are any specials for that parcel record, you can see them on the specials tab here.

Speaker 6 49:56
OK.

Speaker 2 49:59
The other tabs may or may not apply to you. Kind of depends on on how what Dane County wants you to have access to, but those are probably the four or five most common tabs that you'll have access to.

Speaker 6 50:11
Yeah.

Speaker 2 50:14
You'll also have a access to a history button here, so if you needed to see the parcel history, you can do that. It'll provide you with some more information on that parcel record.
Are there any questions on the bill maintenance screen going into a parcel in a little bit more detail?
Anything that we've covered so far before I move into the final three, which are very similar, which is why I'm going to keep them short.

Speaker 1 50:41
Yeah, I don't think so. Except we have. Is there a report with both bill and parcel number that could be?
And exported to Excel.

Speaker 2 50:55
That I'm not entirely certain of, unless we're looking at the bill maintenance report that you can generate from your list of search results. So you do have the bill number

field here. So if you wanted to configure that tax bill number field to be closer to the top of the screen.

Speaker 6 50:58
OK.
OK.

Speaker 2 51:15
You could do that. So you can have your property number and then your tax bill listed here, and then you could essentially just generate the report or the CSV file from your list of search results.

Speaker 6 51:18
Yeah.

Speaker 4 51:19
8.
Hi, this is Kate. What we tell you guys to do if you want to enter in cash receipting, you can use like you said, the bill number and the parcel number are in bill maintenance.
So instead of just staying in cash receiving, you'll go back and forth for each payment and you'll look it up in bill maintenance, add it to your cart, then go to your cart to enter the payment that that's the the only option we've been able to give you because we can't have.
Both in cash receiving.

Speaker 1 52:10
And we have a few minutes left. I'll pass it back to you, Sean.

Speaker 2 52:15
OK, perfect. The the other three menu options, your processes, your reports and your settings. Essentially these all really sort of work in the same sort of fashion. So I'm actually going to access the reports menu, but.
From a high level, they all work sort of the same in that you have a search area at the top of your screen here, and here is where you can search for the name of a specific

process, report or setting. You can use part of the name. So for example, if I'm looking for reports, maybe I'm looking for a batch totals report, I can just type in the word.

Speaker 6 52:32
Yeah.

Speaker 2 52:50
Batch or just art of the word batch and it'll show me any of the reports that contain that word.

Speaker 6 52:56
OK.

Speaker 2 52:58
Next to that I also have a category dropdown. If I wanted to filter down to a specific category of report process or setting, I can do that by selecting it from the dropdown. So I can select cash receiving and that filters down to just my cash receiving reports.

Speaker 6 53:01
OK.

Speaker 2 53:14
Next to your drop down you have the reset button so you can reset it. So if I wanted to just see any and all cash receiving reports, I can just select that category from my drop down here and it will display all of my cash receiving reports here.

Speaker 6 53:17
Yeah.
Yeah.
That's fine.
Well.

Speaker 2 53:31

And then you have your list of search results at the at the bottom of the screen here. And in your list of search results you have a couple of different columns, but you'll notice the very first one is your favorites column. So if you if it's a report, a process or a setting, you're going to run on a regular basis.

Speaker 6 53:31
And.
OK.

Speaker 2 53:49
You can actually click the star to make that item a favorite, and what will happen is you'll notice when I click the star icon, it pulls it to the top of my list. So when I reset this, those two items I've just favorited are now at the very top of my list, regardless of any other sorting I might have.
And then the IT also adds a shortcut into your navigation menu over on the left here. So rather than having to come back into the All Reports section and find the report, I can just quickly access my batch totals from my check deposit summary report right from my navigation menu.
If I want to unfavorite those reports, I can do that by clicking the star icon and it just resets it back into its original position in the default.
And then when you find that report process or setting you are ready to run or access, it's just a matter of clicking on that item to go into it. So for example, if you're running a batch totals report, you can come in here, set your criteria and then click the print button.
And depending on how long that report takes to generate, it may generate on demand if it takes under 60 seconds, and in which case it will just open that report into a new tab. Or if it takes over 60 seconds to generate that report, it will be sent into your process queue. Or in other words, it'll go into.

Speaker 6 55:07
Yeah.
****.

Speaker 2 55:13
My processes and what that will do is it will allow you to continue on with your other

work, doing whatever else you might need to do while that report generates in the background. When that report is ready, you'll get that notification badge next to my processes, the number in the circle like we saw for cash receding and that just.

Speaker 6 55:22
Done.
Oh.

Speaker 2 55:33
Just let you know that you've got something in your process queue that's ready for you to review and retrieve, and then you can come, you can print that out, do whatever it is that you need to do with that report at that point.

Speaker 6 55:40
OK.
1.

Speaker 2 55:49
So.
With that, are there any other questions?

Speaker 1 55:54
Nope, I don't see any for you at all and it is noon. So to respect everybody's time, what I'll do, I will send the recording out along with the notes that were taken and if there are.

Speaker 6 56:01
OK.
Yeah.
I.
I.

Speaker 1 56:27
Or.

Speaker 7 56:29

The only other thing I was thinking is if everyone between now and the October training can please try logging in to Citrix and once you're logged into Citrix then click on the shortcut to get into the.

Catalyst Uh Land NAV QA Land NAV QA.

So.

Speaker 1 56:56

Very good. Awesome. Thank you everybody and have a great afternoon. Bye.

Speaker 7 56:56

That's all I had.

Thank you.

Speaker 6 57:01

Excellent.

Speaker 1 57:03

Thank you.

Speaker 1 stopped transcription