

A large, light blue, stylized 'e' watermark is centered on the page, serving as a background element.

iTax Data Load Instructions

Prior to Completing the Update and Data Load

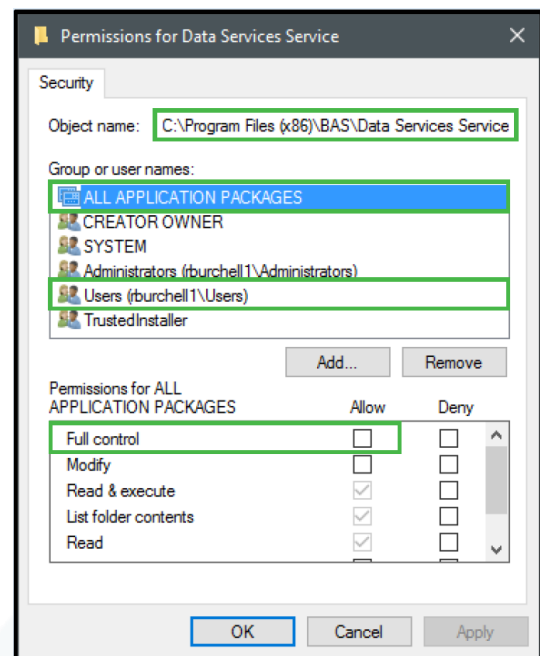
**** IMPORTANT - BACKUP DATA USING SQLBAK BEFORE COMPLETING ANY UPDATES****

To be certain that all present data is protected, a current backup **MUST** exist prior to applying this update. BAS is not responsible for any loss of data that could have been prevented by backing up the system before installation.

- All users must exit the iTax Program
- The Profile for installation must have Local Administration Rights
- The Desktop icon should be run as administrator for first launch
- An exception should be placed in the anti-virus software for the BAS folder "C:\Program Files (x86) \BAS\"
- An internet connection is required to complete updates

Windows 10 Users:

- Set the Up2d8.exe to 'Run as Admin' within the local iTax directory (Right click on Up2d8.exe > Properties > Compatibility tab)
- Grant full control to the BAS folder within security for ALL APPLICATION PACKAGES and Users (Right click on BAS folder->Properties->Security tab)
- Please contact your System Administrator if you have any questions with regard to configuring permissions



If an error occurs at any point during this process, please leave the error displayed on the screen and immediately, contact us for assistance at 518.371.6869 or Support@edmundsgovtech.com

Update Instructions

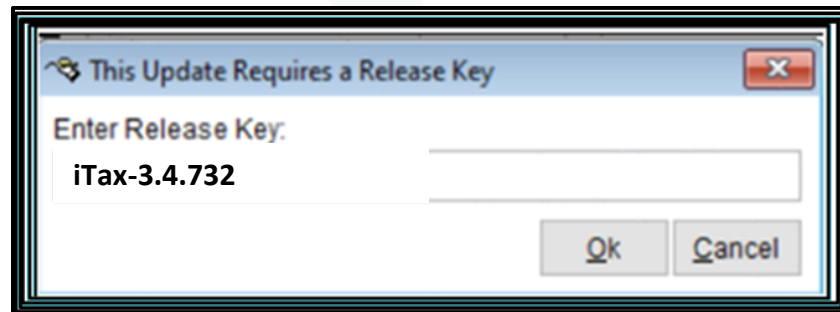
Multiple Workstation Users: Multiple workstation environments require only a single workstation to “Check for Updates”. (All workstations should share the same Update Repository, meaning updates only need to be downloaded once).

Downloading the Update

To begin updating please log in and follow the instructions below:

1. Open the **Utilities** menu, select **About iTax** and click **Get Updates**.
 - If updates are available, you will be connected to the BAS website and the download process will begin.
2. If prompted, type in the release key (this is case sensitive): **iTax-3.4.729**
 - Note: If a Release Key is not required updates will automatically begin.

iTax-3.4.732



3. Your update repository will be populated with the latest files. The files will be applied to the iTax application the next time the tax program is launched from the desktop shortcut.
4. When the download is completed, click “OK.”

Applying the Update

1. Apply updates by opening the iTax program (double click on the **iTax** icon from the workstation's desktop). **Be sure to right-click on the desktop icon and select "Run as administrator" when using a machine with Windows 8, 10 or 11.**
2. Updates will distribute to the system.
3. **For users with multiple workstations:** Apply updates to each workstation by launching the iTax system using the desktop icon for each station.
 - Note: The program can malfunction if all workstations are not updated.
4. To verify that the update was successful, go to **Utilities > About iTax**
 - The iTax version information will appear. To confirm a successful update please compare the below version numbers to the updated workstation.

For multiple workstation environments: this must be done on ALL workstations

Current versions should be as below (or higher):	
iTax.exe	3.4.732
iTax_Data.exe	3.4.807
Payment Computations	3.3.501
TSO and Lockbox	3.3.309
County Exports	3.3.618
Custom Reminder Notices	3.3.507

Printing Successful Completion Notice

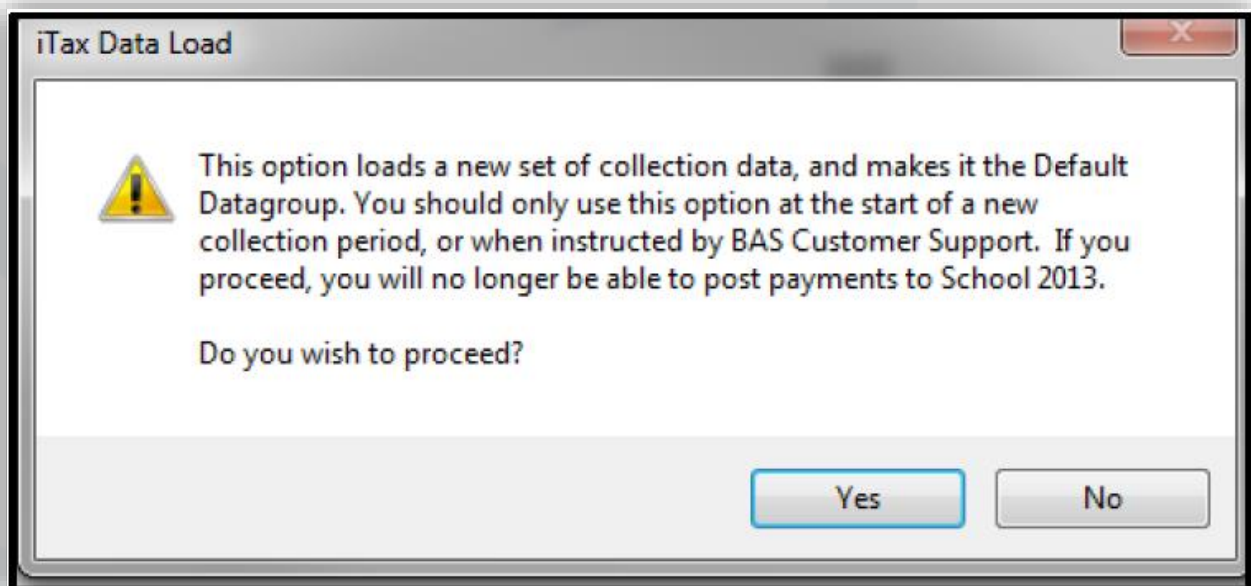
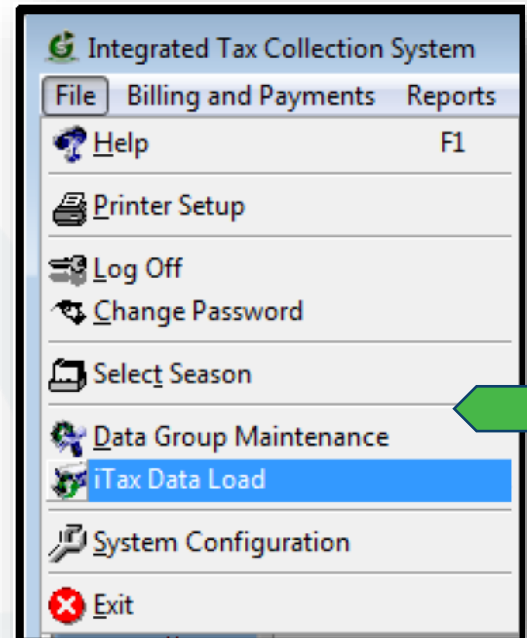
Click "Preview" to generate an About iTax Report. Please print and send a copy of the About iTax page for each workstation, along with the Successful Completion notice to the Clifton Park office via email to Support@edmundsgovtech.com or fax to 518-371-8207.

Data Load Instructions

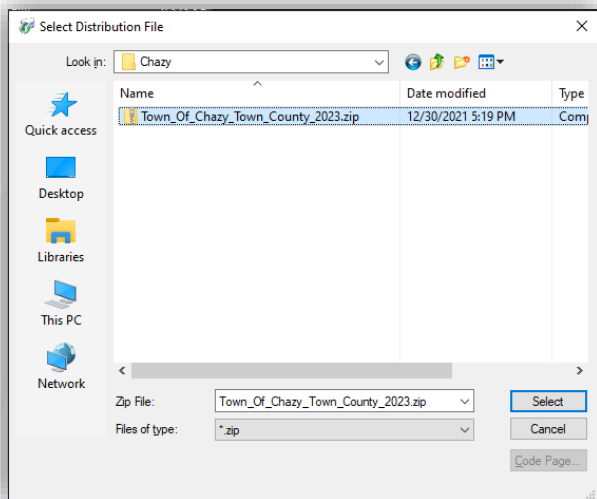
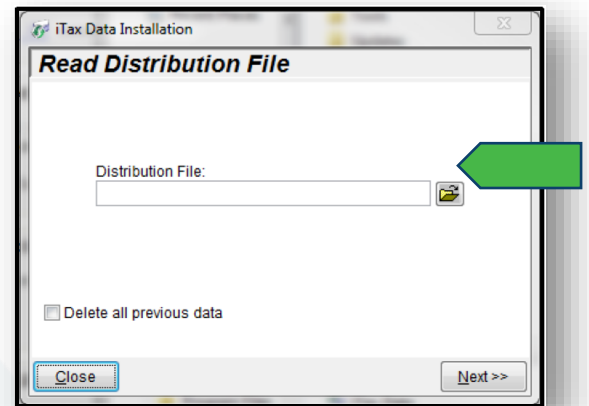
A zip file containing the newest collection information should have been received via email. A data load must be completed to incorporate the newest data into the system.

- Note: Unless otherwise specified, the data load should only be completed once per season.

1. Save the zip file to an easy-to-find location.
2. Within iTax, open the **File** menu and select **iTax Data Load**.
3. Click Yes to the “Do you wish to proceed?” message.



4. At the Logon prompt enter the User ID “BAS” and the Password “**basword**”. (Do not type the quotes or enter your own login)
5. The *iTax Data Installation* Screen will appear.
6. Navigate to the file by left-clicking the Folder Icon to the right of the Distribution File box.
7. Locate the zip file containing the new data (from the location saved in Step 1).



8. Once the file has been located, left-click on the file name and then left-click the Select button in the lower right corner of the window.

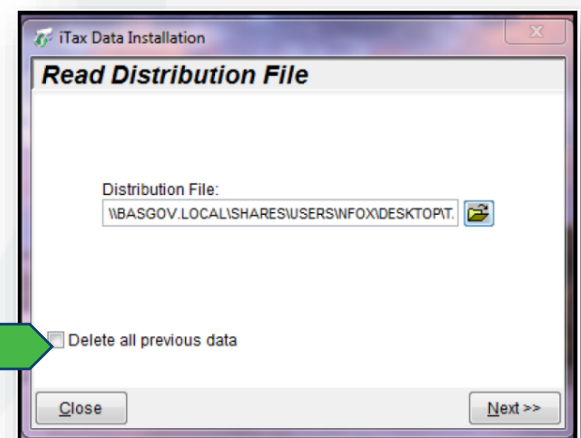
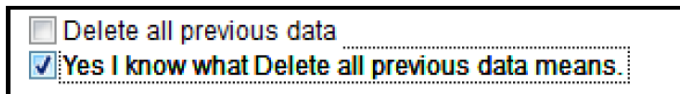
The file name and path location will now be listed in the *Distribution File* field.

9. Below the distribution path exists a checkbox Delete All Previous Data.

If this is the first time the iTax program is being used, check this box to eliminate the "test data."

Existing users skip to Step 12

10. A second checkbox will appear “Yes I know what Delete all previous data means.” New users, without prior data should check this box.

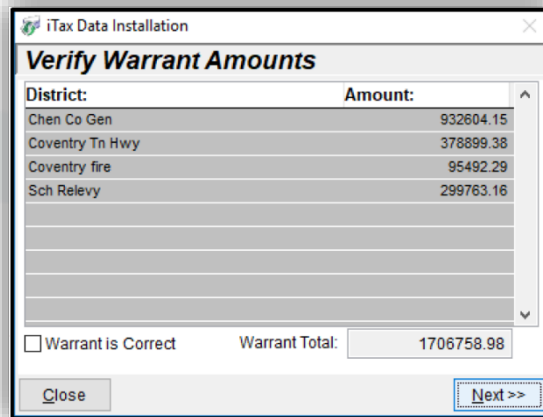


11. The “Delete all previous data” checkbox will need to be selected again, verifying that previous data should be erased. ****Both checkboxes must be checked to continue.**

12. Click “Next”

13. The Verify Warrant Amounts screen will display.

- a) If the warrant total is correct, check the Warrant is Correct checkbox and click the Next button.
- b) If this information is not correct, contact BAS for assistance.



Verify Warrant Amounts

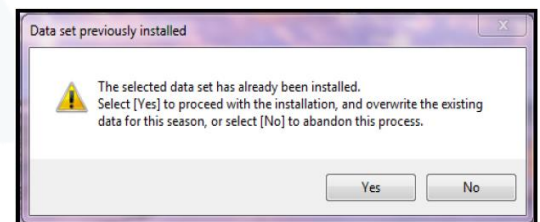
District:	Amount:
Chen Co Gen	932604.15
Coventry Tn Hwy	378899.38
Coventry fire	95492.29
Sch Relevy	299763.16

☐ Warrant is Correct Warrant Total: 1706758.98


14. A prompt may appear to overwrite the existing data. Select **Yes** to proceed.

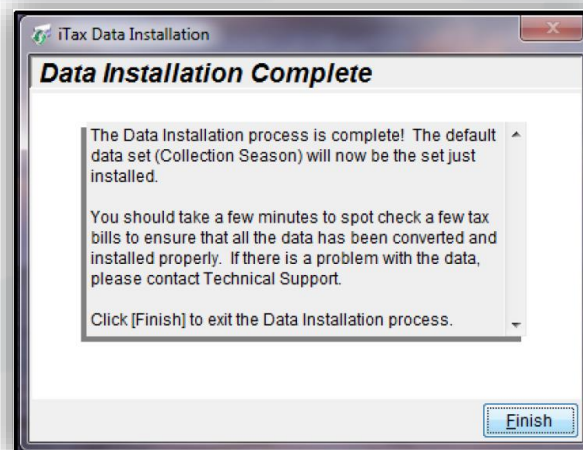
15. A progress bar will appear as the data installs. Once the load is completed, click the **Next** button to continue.

16. When the Data Installation process has successfully completed the **Data Installation Complete** screen will display. Finalize the data load by left-clicking the Finish button.



Data set previously installed

 The selected data set has already been installed. Select [Yes] to proceed with the installation, and overwrite the existing data for this season, or select [No] to abandon this process.



Data Installation Complete

The Data Installation process is complete! The default data set (Collection Season) will now be the set just installed.

You should take a few minutes to spot check a few tax bills to ensure that all the data has been converted and installed properly. If there is a problem with the data, please contact Technical Support.

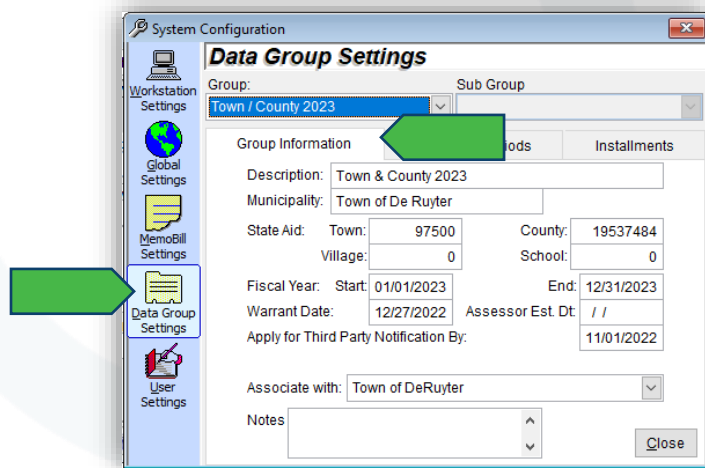
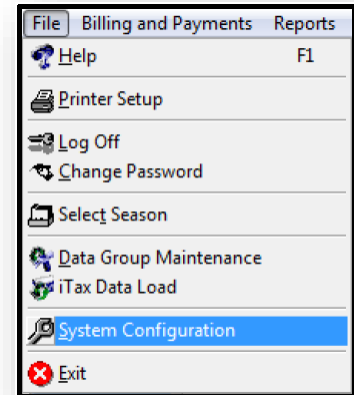
Click [Finish] to exit the Data Installation process.

System Configuration Instructions

1. Within the iTax program, open the **File** Menu, select **System Configuration**.
2. Under *System Configuration*, select the *Data Group Settings* icon on the left of the window. Review the *Group Information* tab and verify that the following are correct:

- Fiscal Year Start Date
- Fiscal Year End Date
- State Aid (Town, County, Village, and School amounts)
- Warrant Date

Items may be edited or added (ex. "Assessor Est. Date" and "Apply for Third Party Notification By"). When changes are complete click "Save" and continue to the *Collections Period* tab.



Note: Towns collecting for schools or other collections with sub-groups: be sure to select the appropriate sub-group and verify the information for each one

3. Enter the *Collections Period* tab and verify that penalty periods are correct.
 - a) Make any necessary changes.
 - b) Click the Save button to complete changes.
 - c) If correct upon entry, simply left-click the Close button.
 - d) If Installment Payments are collected, please verify the information under the *Installments* tab.

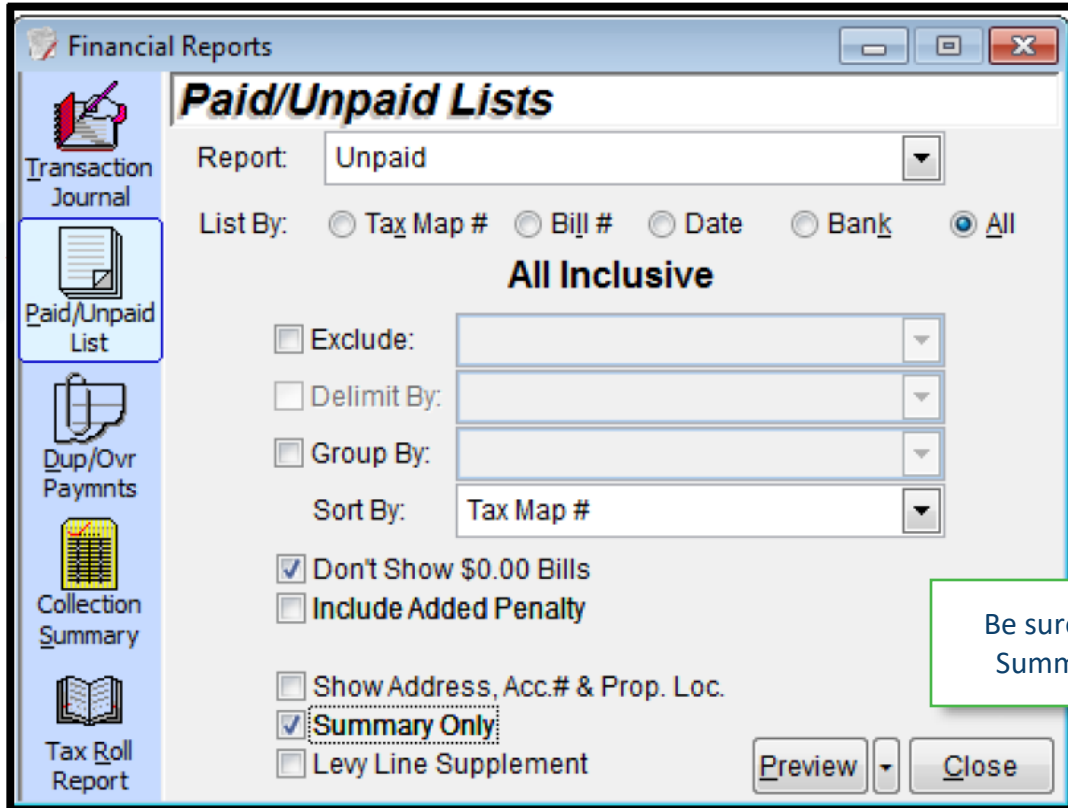
Group Information		Collection Periods	Installments
Period Start:	Period End:	Penalty:	Pay to County: ^
01/01/2023	01/31/2023	0.00	<input type="checkbox"/>
02/01/2023	02/28/2023	1.00	<input type="checkbox"/>
03/01/2023	03/31/2023	2.00	<input type="checkbox"/>

4. Under the **Reports** menu, select **Warrant Reports**.

- a) Preview and verify the report totals are correct.
- b) Print the report if desired.

5. Under the **Reports** menu, select **Financial Reports**

- a) Run an Unpaid Report summary and verify totals.
- b) Print the report if desired.



The screenshot shows a software window titled "Financial Reports". On the left is a vertical menu with icons and labels: "Transaction Journal", "Paid/Unpaid List" (highlighted with a blue border), "Dup/Ovr Paymnts", "Collection Summary", and "Tax Roll Report". The main area is titled "Paid/Unpaid Lists". It contains the following controls:

- Report:** A dropdown menu set to "Unpaid".
- List By:** Radio buttons for "Tax Map #", "Bill #", "Date", "Bank", and "All" (selected).
- All Inclusive:** A section header.
- Exclude:** A checkbox and a dropdown menu.
- Delimit By:** A checkbox and a dropdown menu.
- Group By:** A checkbox and a dropdown menu.
- Sort By:** A dropdown menu set to "Tax Map #".
- Don't Show \$0.00 Bills:** A checked checkbox.
- Include Added Penalty:** An unchecked checkbox.
- Show Address, Acc.# & Prop. Loc.:** An unchecked checkbox.
- Summary Only:** A checked checkbox, which is highlighted with a dashed border.
- Levy Line Supplement:** An unchecked checkbox.
- Buttons:** "Preview" and "Close" buttons at the bottom right.

A green-bordered callout box on the right side of the window contains the text: "Be sure to select Summary Only".

6. Once all the above information has been verified the system is ready for the newest collection. Payments can now be processed.

iTax Collection System

Successful Completion Notice

- ☐ Yes, iTax is updated on all workstations and I have verified the following version numbers:

Current versions should be as below (or higher):	
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iTax_Data.exe	3.4.807
Payment Computations	3.3.501
TSO and Lockbox	3.3.309
County Exports	3.3.618
Custom Reminder Notices	3.3.507

- ☐ Yes, I have successfully loaded the current Data, configured my Payment/Collection Periods, and verified the amount of the Warrant and Unpaid reports.
- ☐ Yes, I have included a copy of the Version Verification Page, **for each workstation**.
- ☐ Yes, I have read and understand the Update Highlights.

Name: _____

Email Address: _____

Municipality: _____

of Workstations: _____

Date: _____

Please fax to 518.371.8207 or email to
Support@EdmundsGovTech.com