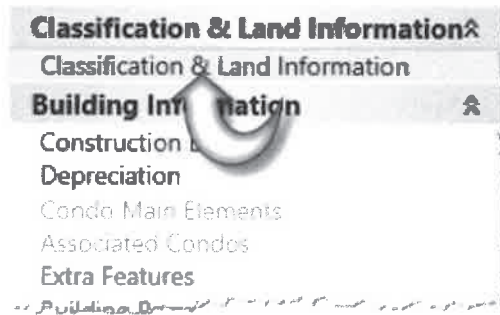




How to Make a Vacant Parcel Improved

The purpose of this document is to assist the user in changing a vacant land parcel to an improved parcel with building information.

1. Select the vacant parcel that will be changed to **Improved**.
2. Select **Classification & Land Information** from the **Classification & Land Information** sub menu, located in the tree on the left hand side of the screen.




 The **Classification & Land** screen will open.

A screenshot of the 'Classification & Land' screen. The screen is divided into several sections. The top section is 'Property Factors' with fields for 'Utilities', 'Street', 'Road Plan', 'Type', 'Soil Type', and 'Location'. The middle section is 'Land Valuation Neighborhoods' with fields for 'Map Nbr', 'Sub Nbr', 'Map Region', 'Parcel Nbr', and 'Zoning'. The bottom section is 'Building Classification And Land Use Valuation' which contains a table with columns: 'Bldg #', 'Line #', 'Code', 'Description', 'Units', 'Unit Type', 'Appraised', 'Assessed', 'Acres', 'Zone', 'Land Type', and 'Land Type Desc'. The table has one row with data: '100V', 'SFD - Urban Vacant', '5', 'AC', '\$167,500.00', '\$167,500.00'. Below the table, there are fields for 'Land Acres' (5), 'Appraised' (\$167,500.00), and 'Info Use' (100V, SFD - Urban Vacant). There is an 'Edit Lines' button at the bottom right.

3. Click on the vacant land line and then click **Edit Lines**.

 The **Land Details** screen will open.

4. Change the **Use Code** to an improved code.

 The code can be changed in two ways.

- 205

Bldg # Line #

Use Code* Land Type

Zoning

District

Frontage

Depth

Units

Unit Type

Special Calcs

5. When you have finished, click **Close**.

Totals

Appraised As

6. Click on **Construction Details** from the **Building Information** sub menu, located in the tree on the left hand side of the screen.

Building Information

7. Change the **Model** and **Style** from Vacant to the model and style of building on the parcel and select a **Grade**. Fill out all other fields with applicable data. Required fields are marked with a red outline and exclamation mark. Required fields are set in the **Admin Module**.

Model	01: Residential	Page 1	EL: Electric
Style	10: SF Dwelling	Page 2	
Grade	05: GOOD		00: No Central Air
Stories		Bedrooms	3
Foundation Type	CN: Concrete	Total Rooms	9
Foundation Type		Full Baths	1
Exterior Wall 1	BF: Brick Front	Full Bath Grade	03: AVG
Exterior Wall 2	CD: Cedar	Half Baths	1
Exterior Wall 3		Half Bath Grade	03: AVG
Overall Cndtn	07: Good	Extra Fixtures	
Roof Structure 1	02: Hip	Extra Fixture Grade	
Roof Cover 1	CS2: Comp Sh	Split Level	
Roof Cover 2		Split Payer	
Interior Wall 1	PA: Paneling	Fireplaces	
Interior Wall 2	WD: Wood	Chimneys	
Interior Floor 1	CA: Carpet	Fireplace Opening	
Interior Floor 2		Basement Type	
Interior Floor 3		Basement Area	
Heat Type	00: No Central Heat	Living Area	



The **Model** and **Style** can be entered in two ways.

- Type the **New** code into the **Model** and **Style** field.
 - Use the drop down menu either by clicking on the drop down arrow on **Model** or **Style** field or click on the field and hit the **F6** key.
8. Next, **Depreciation** needs to be entered for the added building. Select **Depreciation** from the **Building Information** submenu.

Building Information

- Construction Details
- Depreciation**
- Condo Main Elements
- Associated Condos
- Extra Features
- Building Permits
- Fires
- Visit History
- Building Notes
- Photos
- Sketch



The **Depreciation** screen will open.

Depreciation Title
Section Level Depreciation

Year Built 1 Ovr EYB

Effective Year Built

Functional Obsol

Economic Obsol

Condition

Percent Complete

Depreciation Code 1

Remodel Rating

Year Remodeled

Override Value

Section Summary

Group	SIN	Effective Area	
Base Rate	50	Rem	\$40,000
Eff Base Rate	\$100.00	Bldg % Good	30
Net Other Adj	\$40,000.00	RCNLD	\$12,000

Living Area

Code	Description	Gross	Living	Eff Area

Value	Type	Reason Code	Date	ID	Comment
% Good	Remove		Select a date		
Misc. Improve	Remove		Select a date		
Cost To Cure	Remove		Select a date		

Override Appraised Override Assessed Override ID

9. Enter the **Year Built** and the **Depreciation Code**.

Depreciation Title
Section Level Depreciation

Year Built ←

Effective Year Built ☐ Ovr EYB

Functional Obsol

Economic Obsol

Condition

Percent Complete

Depreciation Code ←

Remodel Rating

Year Remodeled

Override Value

Override Initials

Value	Type	Reason



You can enter the **Depreciation Code** in two ways:

- Type the code or value in the **Depreciation Code** field.
- Use the pick list to select from existing codes in the database. This can be accessed either by clicking the drop down arrow on the **Depreciation Code** field or by clicking the field and hit the **F6** key.

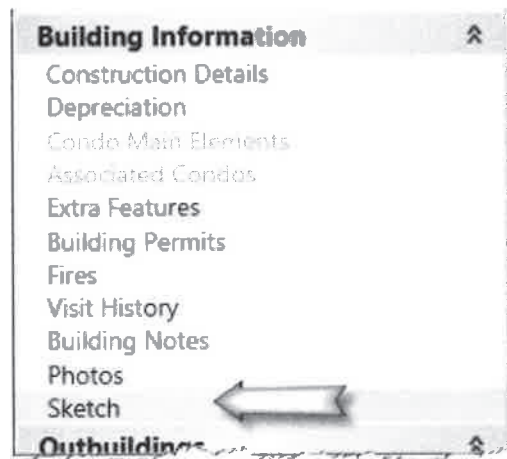


If the parcel is under construction, enter the **Status** and **Percent Complete**.

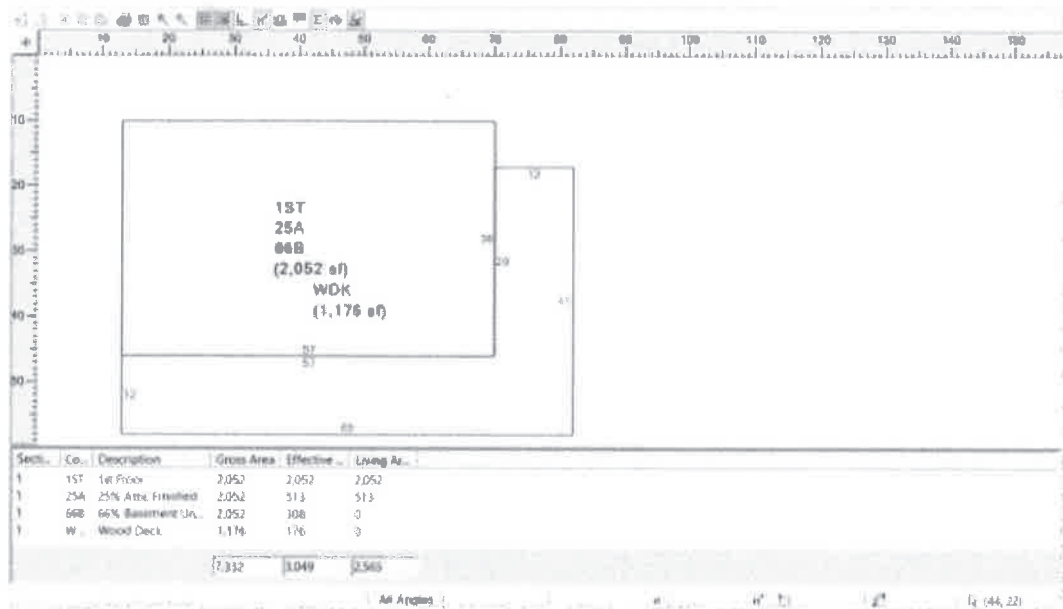
Depreciation Title		
Section Level Depreciation		
Year Built	2005	
Effective Year Built	2007	<input type="checkbox"/> Ovr EYB
Functional Obsol		
Economic Obsol		
Condition	UC: Under Consti	
Percent Complete	85	
Depreciation Code	G: Good	
Remodel Rating		
Year Remodeled		
Override Value		Override Initials

Value Time Reason

10. A **Sketch** needs to be added to the parcel if it has a building to provide gross, living, and effective area values. Select **Sketch** from the Building Information sub menu, located in the tree on the left hand side of the screen.




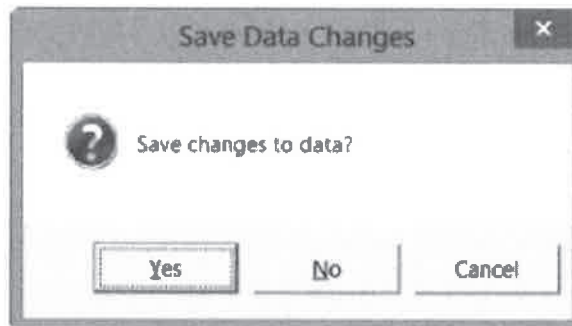
11. Enter your **Sketch**. See **Using the Sketching Tool** for instructions on how to add sketches to a parcel.



12. Once the **Sketch** is complete, click on the **save changes icon**  or press the **F2** key to save your changes.



-  If you pressed the **F2** key, Vision will ask if you want to save changes. Click **Yes**.



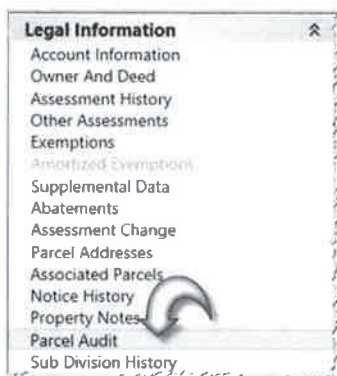


How to Use Real Estate Audit

The purpose of this document is to assist the user in reviewing the recorded changes to a Real Estate parcel. Data can be viewed and sorted on the Parcel Audit screen and also printed for review.

Note: To set the default view to Basic Audit, navigate to **ADMIN > Table Maintenance > Parameter Tables > General** and check the box indicating **Basic Auditing Defaulted**. For configuration instructions, please reference the [Basic Audit Configuration](#) topic found in Admin Help.

1. Select the parcel for which you would like to review the **Audit Trail**.
2. Select **Parcel Audit** from the **Legal Information** sub menu, located in the tree on the left hand side of the screen.



This opens the Parcel Audit Screen

Parcel Audit				
<input checked="" type="checkbox"/> Basic Auditing				
UserID	Date/Time	Table	Field	Description
Y6 Aa	= - Aa	Aa	Aa	Aa
	04/21/2019	ahdate	AHD_MRKT_ASSESS_VAL	Modified: Market Assess Value Old Value: 334400 New Value: 337500
	04/21/2019	ahdate	AHD_TTL_ASSESS_ALT	Modified: Ttl Assess Alt Old Value: 334400 New Value: 337500
	04/21/2019	ahdate	AHD_TTL_ASSESS	Modified: Total Assessed Parcel Value Old Value: 416700 New Value: 419800
	04/21/2019	parcel	PRC_TTL_COST	Modified: Cost Old Value: 416700 New Value: 419800
	04/21/2019	parcel	PRC_TTL_ASSESS	Modified: Total Assessed Parcel Value Old Value: 416700 New Value: 419800.00
	04/21/2019	parcel	PRC_TTL_ASSESS_IMPROVEMENTS	Modified: Total Assessed Improvements Old Value: 334400 New Value: 337500

To sort by a particular field, click on the column header.

Parcel Audit				
<input checked="" type="checkbox"/> Basic Auditing				
UserID	Date/Time	Table	Field	Description
Y6 Aa	= - Aa	Aa	Aa	Aa
	04/19/2019	ahdate	AHD_ASSESSMENT_RATIO	Modified: Ratio Old Value: NOT SET New Value: 100
	04/21/2019	ahdate	AHD_MRKT_ASSESS_VAL	Modified: Market Assess Value Old Value: 334400 New Value: 337500
	04/19/2019	ahdate	AHD_MRKT_ASSESS_VAL	Modified: Market Assess Value Old Value: NOT SET New Value: 334400
	04/19/2019	ahdate	AHD_PROP_TTL_APPRAIS_LND_DEF	Modified: Prop Total Appraised Land Def Old Value: NOT SET New Value: 0

You can also filter data by typing in a column's filter field field.

In the below example, the **Date/Time** column is filtered to return changes recorded on 4/19/2019.

Parcel Audit

☒ Basic Auditing

UserID	Date/Time	Table	Field
Yn Aa	4/19/2019	ahdate	Aa
	04/19/2019	ahdate	AHD_ASSESSMENT_RATIO
	04/19/2019	ahdate	AHD_MRKT_ASSESS_VAL
	04/19/2019	ahdate	AHD_PROP_TTL_APPRAIS_LND_DEF
	04/19/2019	ahdate	AHD_SAVE_DATE

To remove a filter, click the **delete filter icon**  or manually remove the text with the **backspace key**.

Parcel Audit

☒ Basic Auditing

UserID	Date/Time	Table	Field
Yn Aa	4/19/2019	ahdate	Aa
	04/19/2019	ahdate	AHD_ASSESSMENT_RATIO
	04/19/2019	ahdate	AHD_MRKT_ASSESS_VAL
	04/19/2019	ahdate	AHD_PROP_TTL_APPRAIS_LND_DEF
	04/19/2019	ahdate	AHD_SAVE_DATE

To read the full description text, double-click the target field. A window will appear displaying the full audit text.

Parcel Audit

☒ Basic Auditing

UserID	Date/Time	Table	Field	Description
Yn Aa	4/19/2019	ahdate	Aa	Aa
	04/19/2019	ahdate	AHD_ASSESSMENT_RATIO	Modified: Ratio Old Value: NOT SET New Value: 100
	04/19/2019	ahdate	AHD_MRKT_ASSESS_VAL	Modified: Market Ass Value Old Value: NOT SET New Value: 334400
	04/19/2019	ahdate	AHD_PROP_TTL_APPRAIS_LND_DEF	Modified: Prop Total Apprais Land Def Old Value: NOT SET New Value:
	04/19/2019	ahdate	AHD_SAVE_DATE	Modified: Date Saved Old Value: 4/17/2019 12:00:00 AM New Value: 4/19/2
	04/19/2019	ahdate	AHD_TTL_APPRAIS_BLDG	Modified: Total Building Old Value: 332200 New Value: 329100

User Audit

Modified: Date Saved Old Value: 4/17/2019 12:00:00 AM New Value: 4/19/2019 12:00:00 AM

OK

3. To print the audit report, click the **Preview** button.

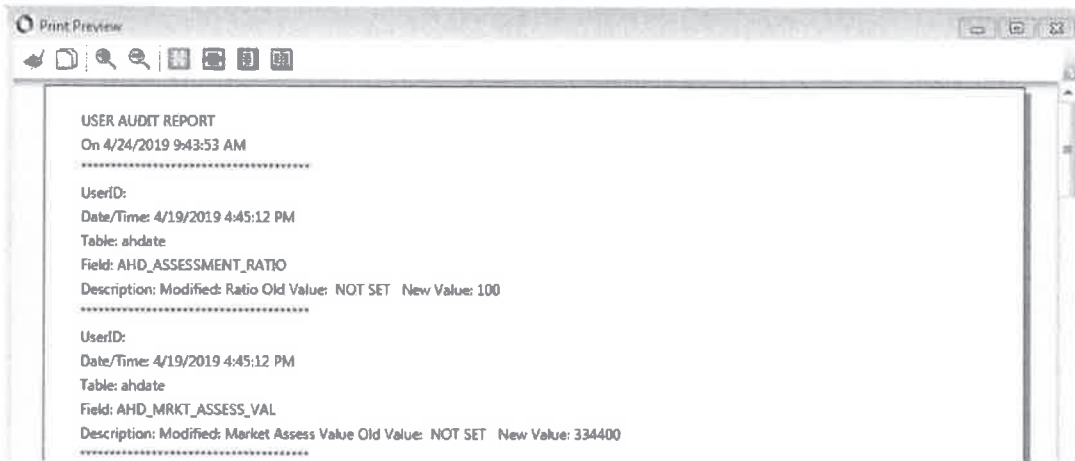
Parcel Audit

☒ Basic Auditing

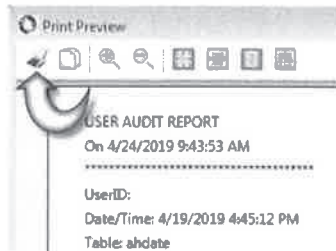
UserID	Date/Time	Table	Field
Yn Aa	4/19/2019	ahdate	Aa
	04/19/2019	ahdate	AHD_ASSESSMENT_RATIO
	04/19/2019	ahdate	AHD_MRKT_ASSESS_VAL
	04/19/2019	ahdate	AHD_PROP_TTL_APPRAIS_LND_DEF
	04/19/2019	ahdate	AHD_SAVE_DATE
	04/19/2019	ahdate	AHD_TTL_APPRAIS_BLDG
	04/19/2019	ahdate	AHD_TTL_APPRAIS_LND_DEF
	04/19/2019	ahdate	AHD_TTL_ASSESS
	04/19/2019	ahdate	AHD_TTL_ASSESS_ALT

Preview

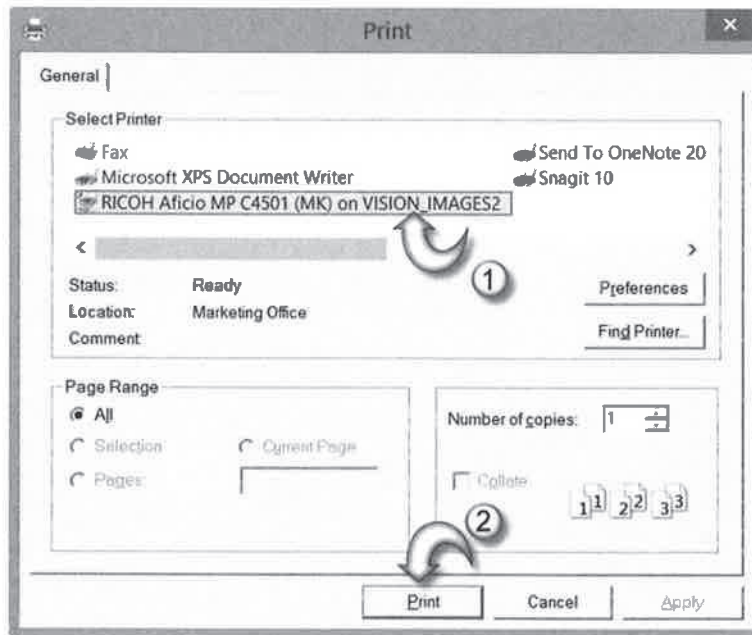
4. The Parcel Audit Report will display in the **Print Preview** screen.



5. Click the print icon on the top toolbar.



6. The Print screen will appear. Select the desired printer and click Print.

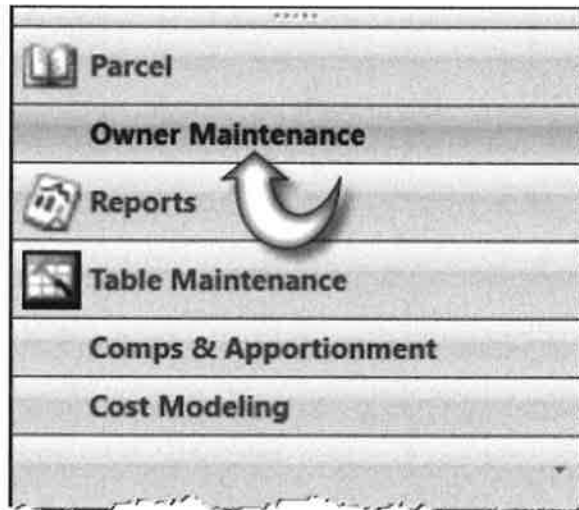




How to Search for an Owner

The purpose of this document is to assist the user in utilizing the search function of the **Owner Maintenance** screen to retrieve existing ownership entries.

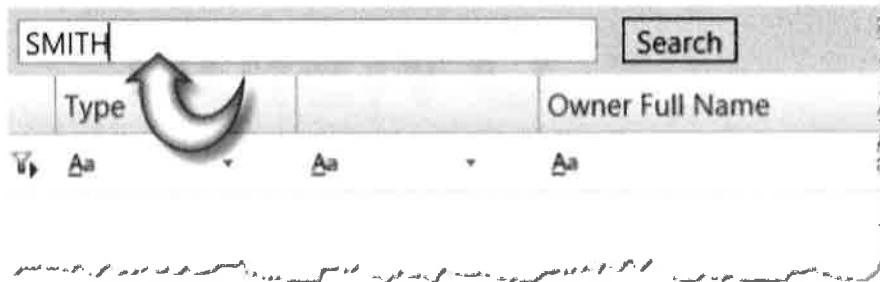
1. Select **Owner Maintenance** from the left navigation tree.



The **Owner Maintenance** screen will appear.



1. To search for an existing Owner click in the **Search** box at the top of the screen and enter all or part of the owner entry you wish to retrieve.



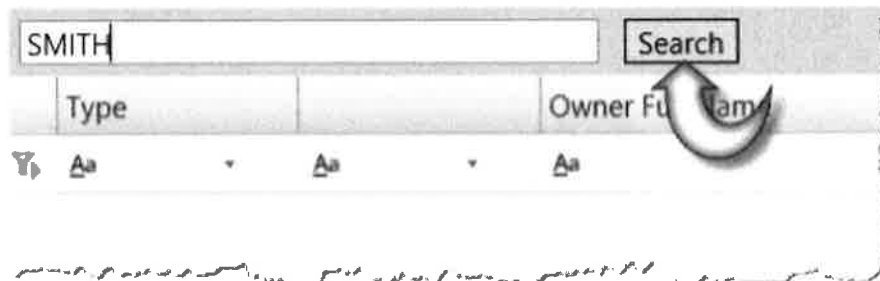
SMITH

Search

Type Owner Full Name

Aa Aa Aa

2. When you have finished typing, click the **Search** button.



SMITH

Search

Type Owner Full Name

Aa Aa Aa



Results will appear in the grid below.

Type	Owner Full Name	Co-Owner Full Name	Address Line 1	City	State
000000004	SARAH SMITH	JACOB JOHNSON	1 Main St	Anytown	MA
000000008	SARAH SMITH	JACOB JOHNSON	2 Main St	Anytown	MA
000000012	SARAH SMITH	JACOB JOHNSON	3 Main St	Anytown	MA
000000016	SARAH SMITH	JACOB JOHNSON	4 Main St	Anytown	MA
000000020	SARAH SMITH	JACOB JOHNSON	5 Main St	Anytown	MA
000000024	SARAH SMITH	JACOB JOHNSON	6 Main St	Anytown	MA
000000028	SARAH SMITH	JACOB JOHNSON	7 Main St	Anytown	MA
000000032	SARAH SMITH	JACOB JOHNSON	8 Main St	Anytown	MA
000000036	SARAH SMITH	JACOB JOHNSON	9 Main St	Anytown	MA
000000040	SARAH SMITH	JACOB JOHNSON	10 Main St	Anytown	MA
000000044	SARAH SMITH	JACOB JOHNSON	11 Main St	Anytown	MA

Add Owner Update Address Supplemental Data Associated Docs Related Accounts





The order in which results are displayed can be changed by clicking on one of the column headers of the search results grid.

Type		Owner Full Name	Co-Owner Full Name
000000136	RE	SARAH SMITH	JACOB JOHNSON
000000140	RE	SARAH SMITH	JACOB JOHNSON
000000144	RE	SARAH SMITH	JACOB JOHNSON
000000148	RE	SARAH SMITH	JACOB JOHNSON
000000152	RE	SARAH SMITH	JACOB JOHNSON
000000156	RE	SARAH SMITH	JACOB JOHNSON
000000160	RE	SARAH SMITH	JACOB JOHNSON
000000164	RE	SARAH SMITH	JACOB JOHNSON
000000168	RE	SARAH SMITH	JACOB JOHNSON
000000172	RE	SARAH SMITH	JACOB JOHNSON

[Add Owner](#)
[Update Address](#)
[Supplemental Data](#)
[Associated Docs](#)
[Related Accounts](#)



Results can also be filtered by clicking on the filter  row below the column header concerned. In the below example results for 'SMITH' are being filtered for results with an owner full name that starts with 'G'. To remove filters click the remove filter  button.

SMITH		Search	
Type		Owner Full Name	Co-Owner Full Name
000123456	RE	GORDON SMITH	JACOB JOHNSON
000000000	RE	SARAH SMITH	JACOB JOHNSON
000000000	RE	SARAH SMITH	JACOB JOHNSON
000000000	RE	SARAH SMITH	JACOB JOHNSON
000000000	RE	SARAH SMITH	JACOB JOHNSON

3. To view more information that what appears in the search results grid, select the result concerned by clicking on the line and the detailed information will appear below under **Account**, **Owner Information**, and **Co-Owner Information**.

SMITH Search

Type	Owner Full Name	Co-Owner Full Name	Address Line 1	City	State
000000004	RE SARAH SMITH	JACOB JOHNSON	1 Main St	Anytown	MA
000000008	RE SARAH SMITH	JACOB JOHNSON	2 Main St	Anytown	MA
000000012	RE SARAH SMITH	JACOB JOHNSON	3 Main St	Anytown	MA
000000016	RE SARAH SMITH	JACOB JOHNSON	4 Main St	Anytown	MA
000000020	RE SARAH SMITH	JACOB JOHNSON	5 Main St	Anytown	MA
000000024	RE SARAH SMITH	JACOB JOHNSON	6 Main St	Anytown	MA
000000028	RE SARAH SMITH	JACOB JOHNSON	7 Main St	Anytown	MA
000000032	RE SARAH SMITH	JACOB JOHNSON	8 Main St	Anytown	MA
000000036	RE SARAH SMITH	JACOB JOHNSON	9 Main St	Anytown	MA
000000040	RE SARAH SMITH	JACOB JOHNSON	10 Main St	Anytown	MA
000000044	RE SARAH SMITH	JACOB JOHNSON	11 Main St	Anytown	MA

Add Owner Update Address Supplemental Data Associated Docs Related Account

Account Information
 Account: 000000016 Type: RE: Real Estate Suppress: Alternate id:

Owner Information
 Owner Full Name: SARAH SMITH Edit Full Name
 Salutation: First Name: SARAH Middle: Last Name: SMITH Suffix:
 Email: Phone: Home Phone:
 Type: Dob: Select a date (13) Marital Code: Reference: ☐ Veteran

Co-Owner Information
 Co-Owner Full Name: JACOB JOHNSON
 Salutation: First Name: JACOB Middle: Last Name: JOHNSON Suffix:
 Email: Phone:
 Type: Dob: Select a date (13) Marital Code: Reference:

Comment:



A new search can be started at any time by repeating steps two and three.

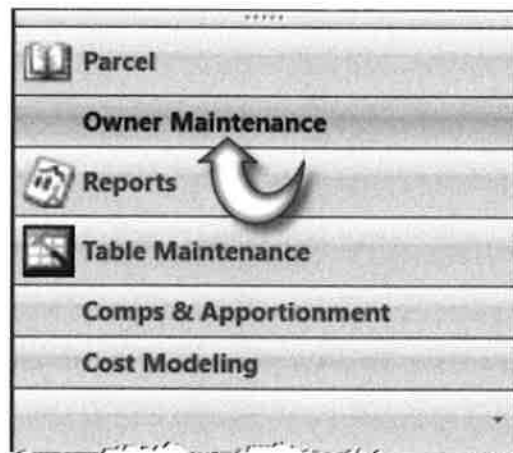
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Adding an Owner

The purpose of this document is to assist the user in entering a new ownership entry into the **Ownership Maintenance** screen.

1. Select **Owner Maintenance** from the left navigation tree.



The **Owner Maintenance** screen will appear.



Before a new owner can be added, you must first perform a search to ensure the new owner intended for entry does not already exist in the database.

2. Click in the Search field and type in the name of the new owner. Click **Search** to see the results.

File Cards Utilities Help

Vision 8 Application Explorer

Owner Maintenance

Owner Maintenance

Owner Maintenance

WAYNE Search

Account	Type	Owner Full Name

3. If the new owner intended for entry does not appear in the results, click the **Add Owner** button to make a new entry.

File Cards Utilities Help

Vision 8 Application Explorer

Owner Maintenance

Owner Maintenance

Owner Maintenance

WAYNE Search

Account	Type	Owner Full Name

Add Owner Update Address Supplemental Data Associated Docs Related Accounts



A blank ownership line will appear in the grid and the black information fields will appear below.

NELSON Search

Type	Owner Full Name	Co-Owner Full Name	Address (zip)	City	State

Add Owner Update Address Supplemental Data Associated Docs Related Accounts

Account Information

Account Type Suppress Alternate Id

Owner Information

Owner Full Name Edit Full Name

Substitution First Name Middle Last Name Suffix

Email Phone Mobile Phone

Type DOB Sex SSN Marital Code Reference

Select a date

Comment

Co-Owner Information

Co-Owner Full Name Edit Full Name

Substitution First Name Middle Last Name Suffix

Email Phone

Type DOB Sex SSN Marital Code Reference

Select a date

Comment

4. Begin by filling out the **Account Information** section. Enter the relevant information into the **Account, Type, Suppress, and Alternate Id.**


Account Information			
Account	Type	Suppress	Alternate Id
000123456	RE: Real Estate		

5. Next, fill out the **Owner Information** fields. Required fields will be marked with a red outline and exclamation mark. These are set in the Admin Module.

Owner Information					
Owner Full Name					<input type="checkbox"/> Edit Full Name
THOMAS PAUL NELSON					
Salutation	First Name	Middle	Last Name	Suffix	
Mr.: Mr	THOMAS	PAUL	NELSON		
Email		Phone	Home Phone		
tpnelson@vgsi.com		555-555-0005	555-555-0004		
Type	Dob	Ssn Edit	Marital Code	Reference	
	5/4/1962	*** - ** - ****	4: Single		
<input type="checkbox"/> Veteran					
Comment					

- If this owner entry has a Co-Owner, fill out the **Co-Owner Information** section with the relevant information.
- Please note, if the owner owns multiple properties in the database and some are without a co-owner or with a different co-owner, a separate owner maintenance entry would need to be created for each unique combination.

Co-Owner Information					
Co-Owner Full Name					<input type="checkbox"/> Edit Full Name
Salutation	First Name	Middle	Last Name	Suffix	
Mrs.: M					
Email		Phone			
Type	Dob	Ssn Edit	Marital Code	Reference	
	Select a date				
<input type="checkbox"/> Veteran					
Comment					

6. When you have finished entering the information for the new owner, click on the **save changes** icon .



The new owner entry will now be available in the **Owner Maintenance** screen and available for addition to new sale records in parcel data. For information on entering a new sale to the **Owner and Deed** screen, please see the **How to Add a New Sale Record** document.

NELSON		Search
Type	Owner Full Name	
000123456	RE	THOMAS PAUL NELSON

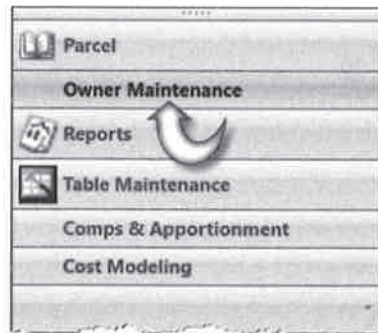
© 2019 Vision Government Solutions Inc. All Rights Reserved.
 1 Cabot Rd. Hudson, MA 01749 (800) 628-1013 www.vgsi.com
Equal Opportunity Employer/Affirmative Action Employer



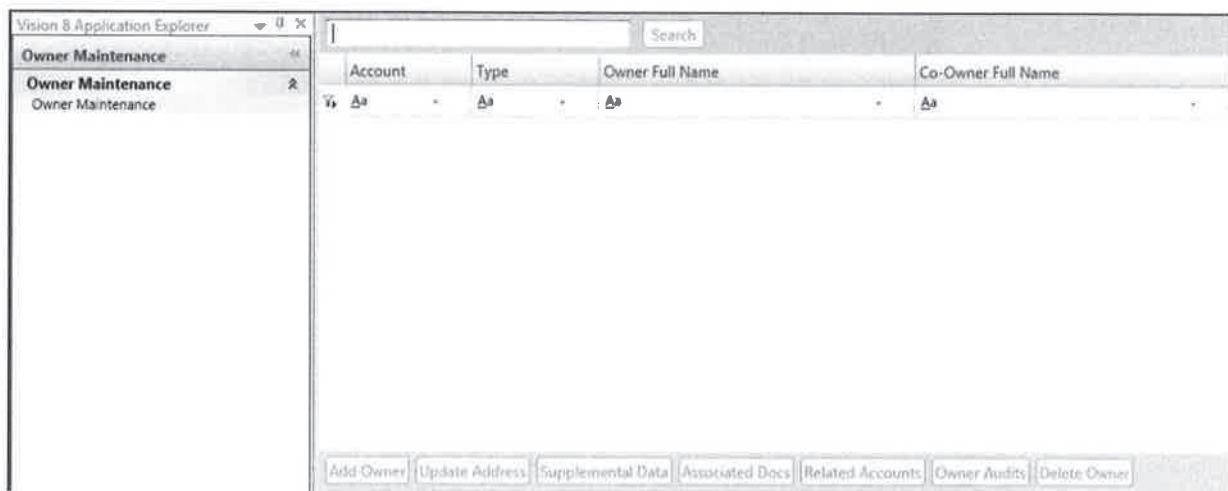
Updating an Owner Mailing Address

The purpose of this document is to assist the user in updating an existing owner in the **Owner Maintenance** module.

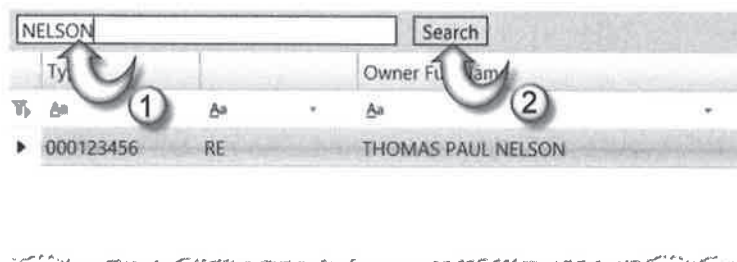
1. Select **Owner Maintenance** from the left navigation tree.



 The **Owner Maintenance** screen will appear.



2. Search for the owner entry that needs to have the mailing address updated. Type part of the name in the **search** field and then click **search**.





For more information on using the owner search, please see the **Searching for an Owner** document.

- Click on the owner entry you wish to update from the results. Once the owner has been selected, click **Update Address**.

Type	Owner Full Name	Co-Op
000123456	RE	THOMAS PAUL NELSON

Buttons: Add Owner, Update Address, Supplemental Data, Associated Docs, Related Accounts



The **Mailing Address Maintenance** screen will appear.

Owner Information: THOMAS PAUL NELSON

Address Type	Name Line 1	Address Line 1	City
1	THOMAS PAUL NELSON	12 MAIN ST	

Buttons: Add Address / Delete Address, Close

- To begin making changes click on the address for the selected owner that is to be updated.

Owner Information: THOMAS PAUL NELSON

Address Type	Name Line 1	Address Line 1	City
1	THOMAS PAUL NELSON	12 MAIN ST	

Buttons: Add Address / Delete Address, Close

- Make any necessary edits to the **Address Type** fields.

Address Type: 1: Primary Start Month/Day: End Month/Day:

Name Line 1: THOMAS PAUL NELSON

Name Line 2:

Care Of: JACKSON ACCION

6. Make any necessary edits to the **Address Information** fields.

Address Information

Address Line 1: 12 MAIN ST FL 1 ☐ Override Address Details

Address Line 2:

Address Line 3:

Box Number: Pre Direc.: Post Direc.:

Street Number Prefix: 12 Street Name: MAIN

Street Type: ST: Street Suffix: Unit Number: Unit Type: FL: Floor

-  Changes will be updated in the grid.

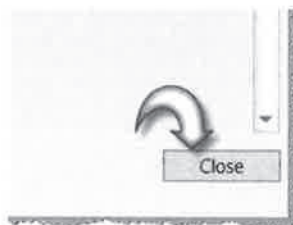
Mailing Address Maintenance

Owner Information: THOMAS PAUL NELSON

Address Type	Name Line 1	Address Line 1	City	State	Zip	Carrier
1	THOMAS PAUL NELSON	12 MAIN ST FL 1	MA	00000	1	

Add Address Delete Address

7. Once all address changes have been made, click **Close** at the bottom right of the **Mailing Address Maintenance** screen.



8. Click on the **save changes icon**  to save your changes before navigating out of owner maintenance or searching for a new owner.

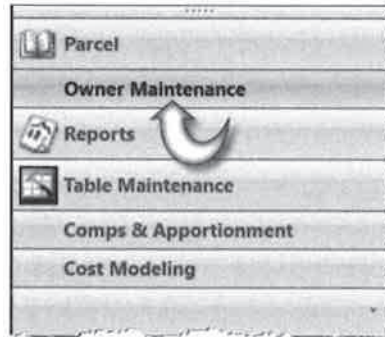




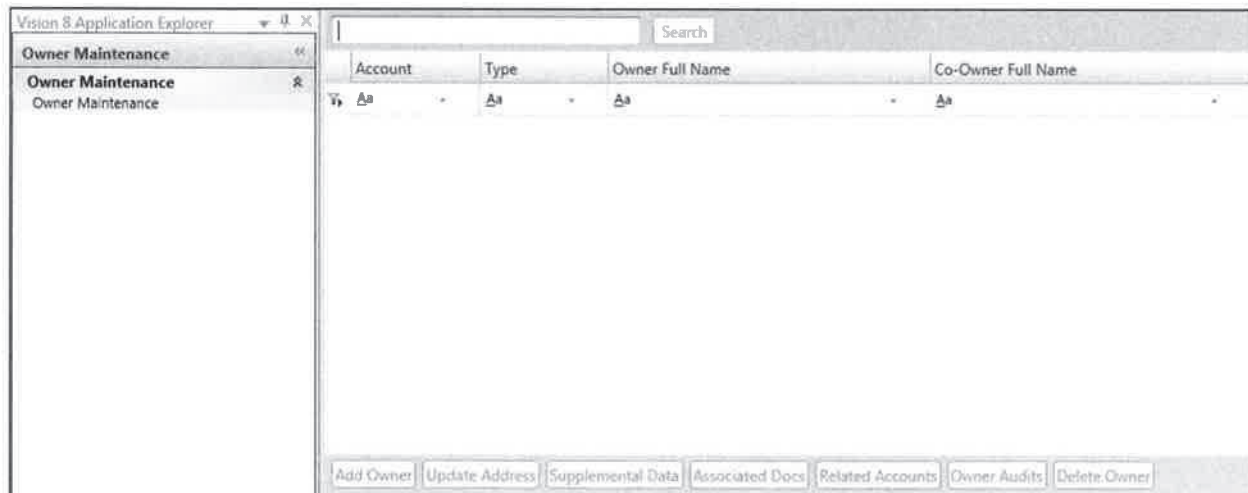
Supplemental Owner Data

The purpose of this document is to assist the user in adding Supplemental Owner Data in the **Owner Maintenance** screen. The fields on this screen are defined by the user, for information regarding setting up supplemental owner data please see the **Admin App** documentation.

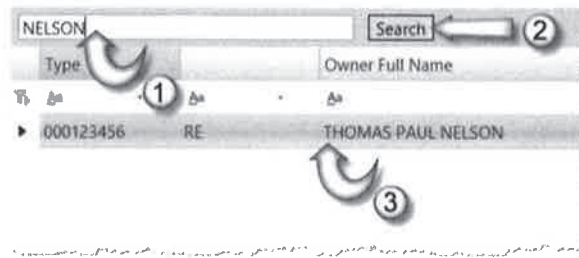
1. Select **Owner Maintenance** from the left navigation tree.



The **Owner Maintenance** screen will appear.



2. Type the owner name you wish you add **Supplemental Owner Data** to and click search. Select the owner desired from the list of results.



For more information on searching for owners, please see the **How to Search for an Owner** document.

- Once the owner has been selected, click the **Supplemental Data** button.

Search bar: NELSON Search

Table:

Type	Owner Full Name
000123456	THOMAS PAUL NELSON

Buttons: Add Owner, Update Address, Supplemental Data, Associated Docs, Related Accounts

- The **Supplemental Owner Data** window will appear.

Supplemental Owner Data

Owner Information: THOMAS PAUL NELSON

Supplemental Data

Owner User Field 1

Owner User Field 2

Owner User Field 3

Save Close

- The available **Supplemental Owner Data** fields will be displayed. Enter the relevant data into the appropriate fields. If a supplemental data field has a list of pre-defined values you may select them from the drop down pick list.

Supplemental Owner Data

Owner Information: THOMAS PAUL NELSON

Supplemental Data

Owner User Field 1

Owner User Field 2

Owner User Field 3

Line 3 Data

Supplemental Owner Data

Owner Information: THOMAS PAUL NELSON

Supplemental Data

Owner User Field 1

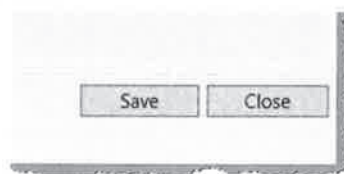
Owner User Field 2


Owner User Field 3

PI1: Pick Item 1
PI2: Pick Item 2
PI3: Pick Item 3

- Pick list assignments, pick items, required fields, and numeric character restrictions are all controlled by settings in the **Admin Application**. Please see the **Admin App – Table Maintenance** documentation for more information

5. Once all relevant data has been entered, save the information by clicking the **Save** button at the bottom right of the **Supplemental Owner Data** screen.



6. Click on the **save changes icon**  to save your changes before navigating out of owner maintenance or searching for a new owner.



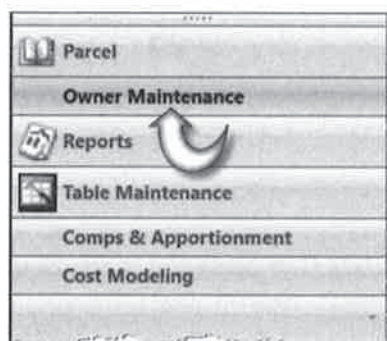
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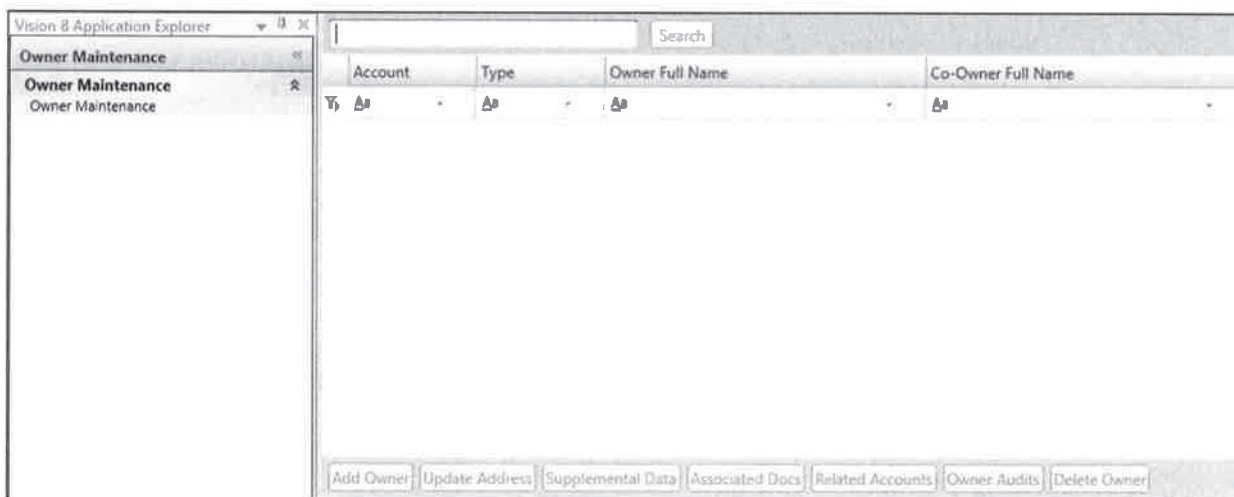
Owner Associated Documents

The purpose of this document is to assist the user in adding associated documents to an owner record in the Owner Maintenance module.

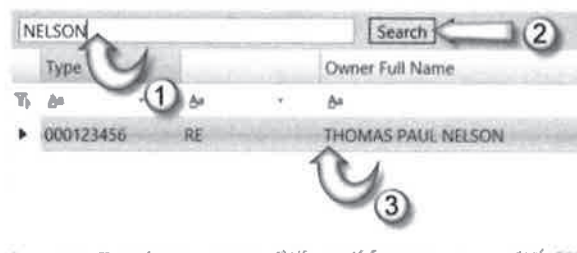
1. Select **Owner Maintenance** from the left navigation tree.



The **Owner Maintenance** screen will appear.

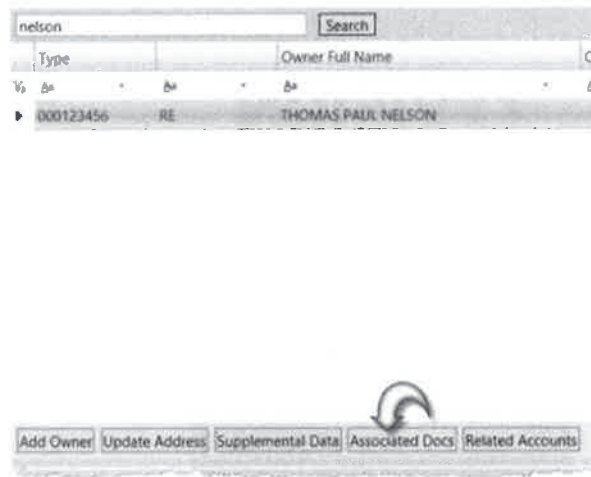


2. Type the owner name you wish you add an **Associated Document** to and click search. Select the owner desired from the list of results.

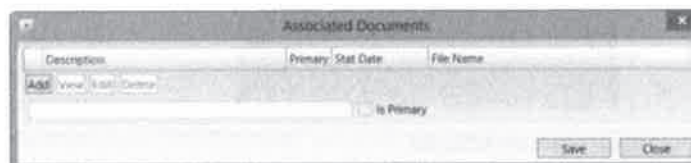


For more information on searching for owners, please see the [How to Search for an Owner document](#).

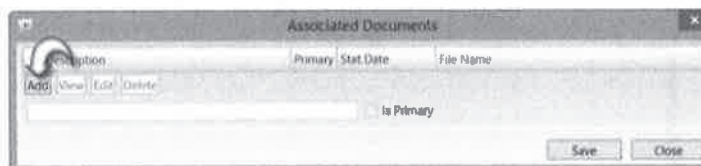
- Once the owner has been selected, click the **Associated Docs** button.



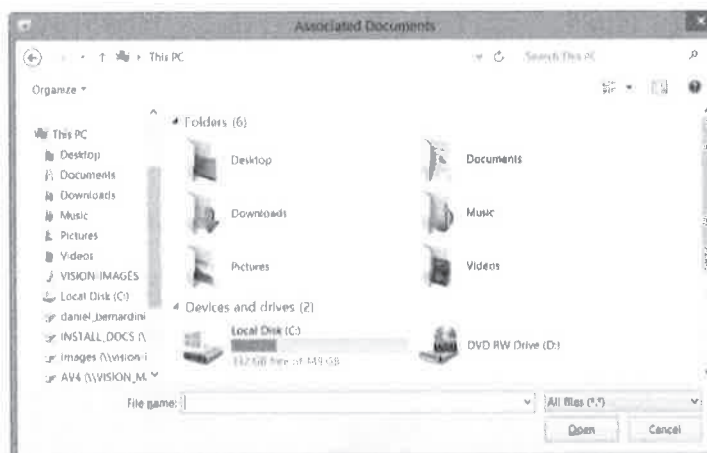
- The **Associated Documents** window will appear.



- To enter a new document, click the **Add** button



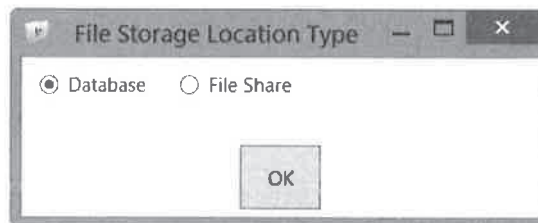
- The open **Associated Documents** window will appear.



- Navigate to the location of the document to be added to the ownership record. Select the desired document and click the **Open** button.



- The open **File Storage Location Type** window will appear. Select a location to store the file. If you choose **database** this file will be added to the Vision Database. If you choose **File Share** the document will be saved to the Vision Documents Shared Network folder .

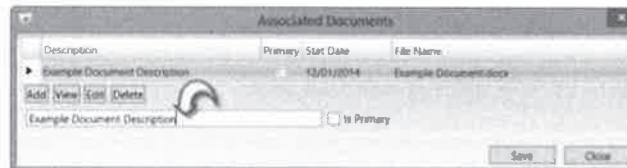


- Note:** If the File Storage Location Type does not prompt, this means the File Share Location is not configured. Please contact Customer Support at 1-800-628-1013 for assistance.

- The newly added file will appear in the grid.



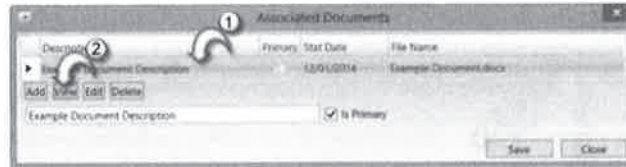
6. Associated documents can be given a description. Click on the document desired in the **Associated Documents** window and type a document description in the field below. The grid will be updated with the description added.




7. Documents can be **flagged as Primary** to indicate the most important document for the owner entry. Select the document to be flagged as primary and click the **Is Primary** box



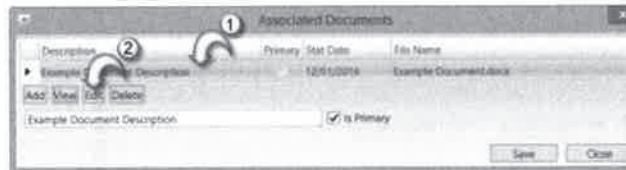
8. To open a **Read Only** copy of an associated document, select the desired document from the grid and click the **View** button




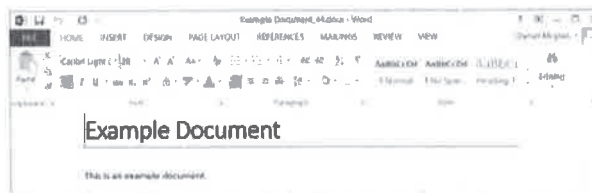
-  The document will open as **Read Only** in the default program for the document type. In this example a .docx file was used which opens in Microsoft Word by default.



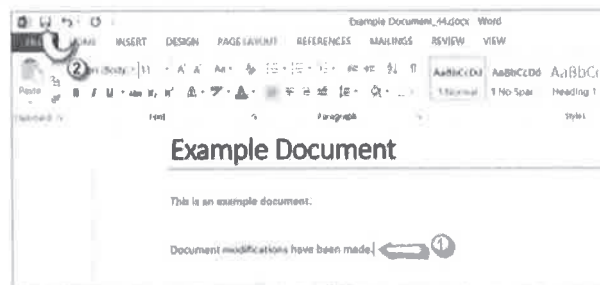
9. To make changes to an existing associated document, select the document concerned and click the **Edit** button.



-  The document will open in the default program for the document type. In this example a .docx file was used which opens in Microsoft Word by default.



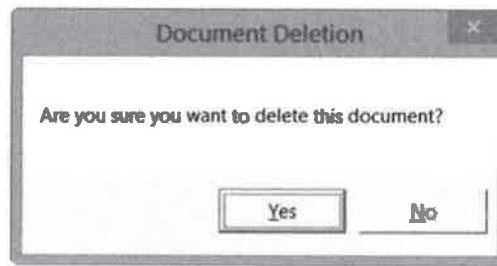
10. Make your changes to the document. After making changes, be sure to **Save**. In the below example the document was opened in Microsoft Word, the save button is on the top left.



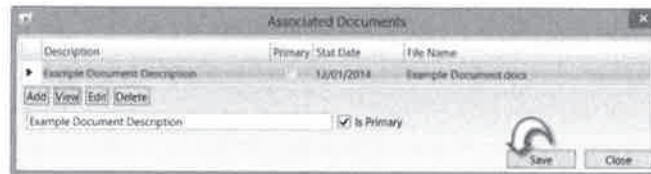
11. To remove an associated document from an owner entry, select the document to be deleted and click the **Delete** button.



-  The **Document Deletion** notification will appear. Click **Yes** to remove the document from the ownership record.



12. Once all changes to the **Associated Documents** for this ownership record have been completed, click the **Save** button.



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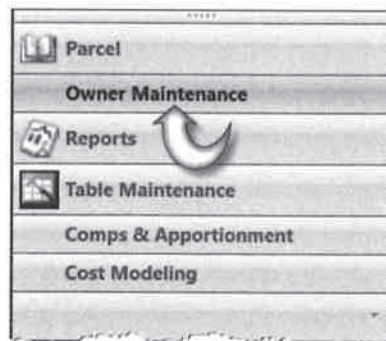
VISION

GOVERNMENT SOLUTIONS

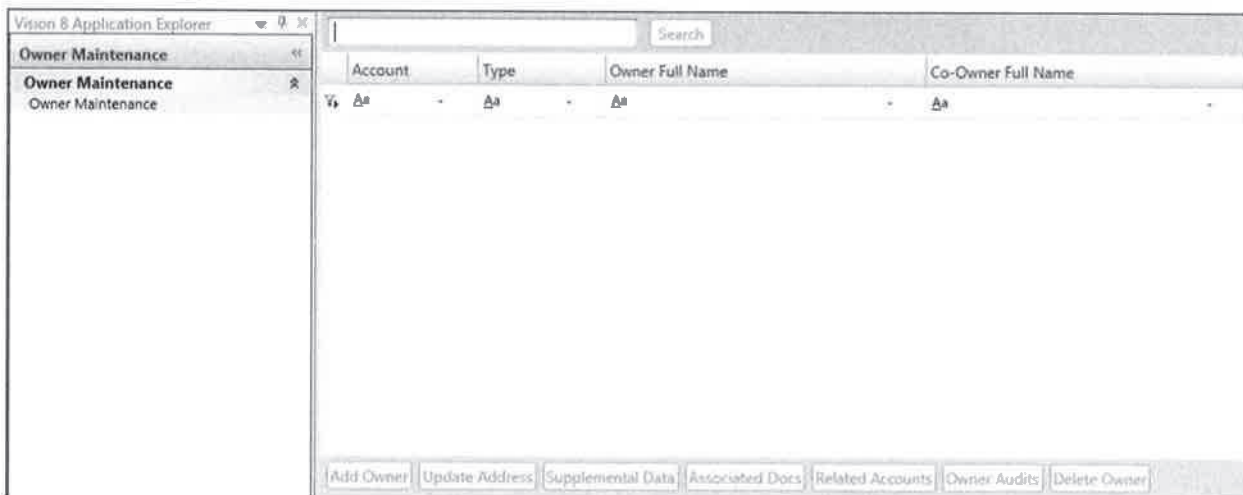
Related Accounts

The purpose of this document is to assist the user in utilizing the Related Accounts section of the owner maintenance module. This section allows the user to review Real Estate Parcels and Personal Property Accounts to which the owner entity is connected.

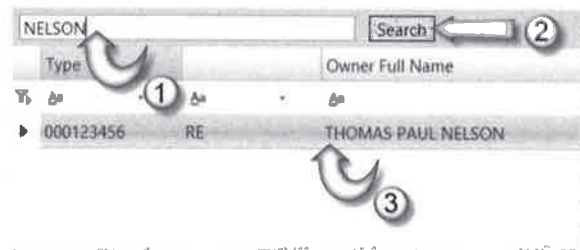
1. Select **Owner Maintenance** from the left navigation tree.




2. The **Owner Maintenance** screen will appear.

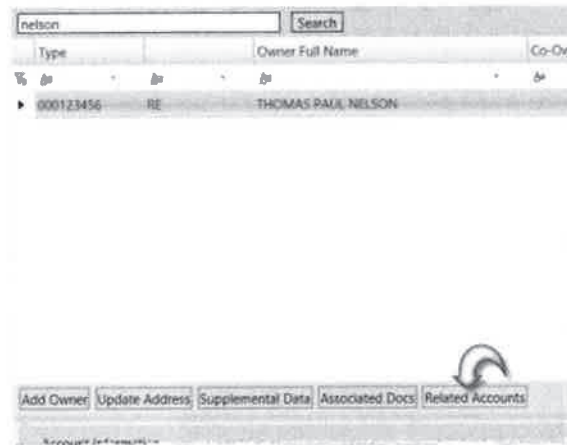


2. Type the owner name you wish you add **Supplemental Owner Data** to and click search. Select the owner desired from the list of results.



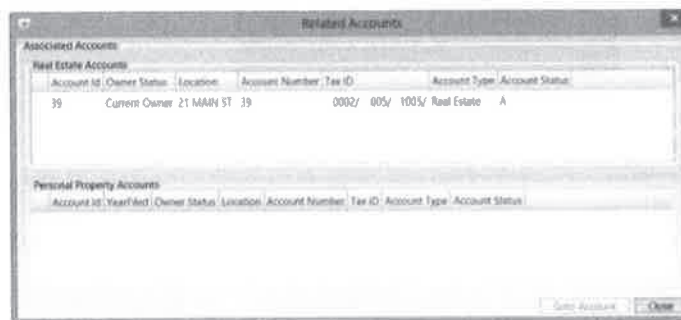
 For more information on searching for owners, please see the [How to Search for an Owner](#) document.

3. Once the owner has been selected, click the **Related Accounts** button.




The screenshot shows a search interface with a text input field containing 'nelson' and a 'Search' button. Below the search bar is a table with columns: Type, Owner Full Name, and Co-Owner. A single row is visible with the following data: Type: RE, Owner Full Name: THOMAS PAUL NELSON, Co-Owner: (blank). Below the table is a navigation bar with buttons: Add Owner, Update Address, Supplemental Data, Associated Docs, and Related Accounts. The 'Related Accounts' button is highlighted with a circular arrow.

 The **Related Accounts** screen will appear.



The screenshot shows the 'Related Accounts' window. It has two main sections: 'Real Estate Accounts' and 'Personal Property Accounts'. The 'Real Estate Accounts' section contains a table with columns: Account ID, Owner Status, Location, Account Number, Tax ID, Account Type, and Account Status. A single row is visible with the following data: Account ID: 39, Owner Status: Current Owner, Location: 21 MAIN ST, Account Number: 39, Tax ID: 0002/ 005/ 1005/, Account Type: Real Estate, Account Status: A. The 'Personal Property Accounts' section is currently empty.

 The **Related Accounts** screen displays a list of all **Real Estate Accounts** and **Personal Property Accounts** on which the selected owner entity is recorded including the following fields:

- Account ID- The internal parcel or property account identification number (PID, PropID).
- Year Filed(Personal Property Account only)
- Owner Status- Current Owner, Past Owner, Future Owner
- Location- Primary Parcel/Property Account address
- Account Number- Parcel/Property Account number
- Tax ID- Map/Block/Lot/Unit
- Account Type- Real Estate, Personal Property, Central Assessed
- Account Status- Parcel/Property Account status (Active, Inactive, Future)

4. Users may open any related account from this screen. First select the account to be opened and press the **Goto Account** button.

Related Accounts

Associated Accounts

Real Estate Accounts

Account ID	Owner Status	Location	Account Number	Tax ID	Account Type	Account Status
39	Current Owner	21 MAIN ST	39	0002	000/ 100/ Real Estate	A

Personal Property Accounts

Account ID	Year Aired	Owner Status	Location	Account Number	Tax ID	Account Type	Account Status
------------	------------	--------------	----------	----------------	--------	--------------	----------------

Go to Account Close

The selected real estate parcel or personal property account will open on the **Account Information** screen.

Account Information

MBL: 0002/ 005/ 1005/ Primary User: 0002/ Use Type: Internal ID: 39 Work in Prog: Living Area: 2000
 Location: 21 MAIN ST Total Assessed: \$12,400 Land Acres: 0
 Sq/ Ltr/Blk: 100/77

ACCOUNT INFORMATION

MBL: 0002/ 005/ 1005/ Build MBL: Parcel Status: A: Active
 Account Number: 000715533 39-P-B Owner Occupied Create Date: 11/13/2014
 Unit: Unit Type: 39-P-B

Property Location: 21 MAIN ST Legal Area: 1
 City/County/Zip: ANYTOWN/ MA/ 00000 Primary Use: 100/ 100/ Urban Vacant
 State/County: MA/ 000715533
 Owner Name: THORAS PAUL NELSON
 Building Name: 1-100/77

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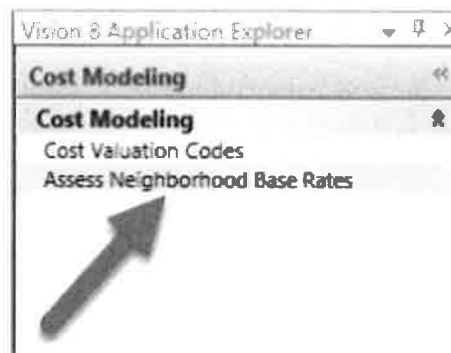


How to Add an Assessing Neighborhood

This document will guide the user through table updates necessary to create new Assessing Neighborhood codes.

Section I: Cost Modeling

1. Click on **Cost Modeling** in the Application Explorer tree, then select **Assessing Neighborhood Base Rates**. Due to flexible labeling, your table may be labeled as Neighborhood/Market Area Land Valuation or another similar label.



2. Select the desired **Building Type** for the new neighborhood code.

Assessing Neighborhoods

Building Type

Code	Description
00	Vacant
01	Residential
02	Mobile Home
04	Condo Main
05	Res Condo
06	Condo Condo
94	Commercial
95	Serv Station
96	Industrial

3. The new **Code** is added via either manual entry or the copy function.

- For manual entry, enter desired data in the top row indicated by the **plus (+)** sign.

Assessing Neighborhoods

Copy Assessing Neighborhoods

From: Residential To: 00 Vacant Copy

Freeze Values	Code	Description	Cost Model	Cost Trending	Sale Trending	Camp Sale	Camp Trending	Reg Model	Model Adj	Trend Factor	Adj #1	Adj #2
	TEST2	Test 2	Residential	1.000	RES	RL	1.000	1.000	1.000	1.000	1.000	1.000
	02AD	02AD	Residential	1.000	RES	RL	1.000	1.000	1.000	1.000	1.000	1.000
	02BC	02BC	Residential	1.000	RES	RL	1.000	1.000	1.000	1.000	1.000	1.000
	02CA	02CA	Residential	1.000	RES	RL	1.000	1.000	1.000	1.000	1.000	1.000
	02BC	02BC	Residential	1.000	RES	RL	1.000	1.000	1.000	1.000	1.000	1.000
	02ME	02ME	Residential	1.000	RES	RL	1.000	1.000	1.000	1.000	1.000	1.000

- To copy, select the source code in the **From:** dropdown, then assign a new code in the **To:** box. Select the desired target **Building Type**, then click **Copy**. Review the Confirm Copy pop-up then click **Yes** to approve.

Copy Assessing Neighborhoods

From: 02AD Residential To: TEST2 01 Residential Copy

Freeze Values	Code	Description	Cost Model	Cost Trending	Sale Trending	Camp Sale	Camp Trending	Reg Model	Model Adj
	02BA	02BA	Residential	1.000	RES	RL	1.000	1.000	1.000
	02BA	02BA	Residential	1.000	RES	RL	1.000	1.000	1.000
	02BA	02BA	Residential	1.000	RES	RL	1.000	1.000	1.000

Confirm Copy

Do you wish to copy all data entries from 02BA to TEST2?

Do you wish to proceed?

Yes No

- Review the new codes, altering as necessary. Once complete, click **Apply**.

Assessing Neighborhoods

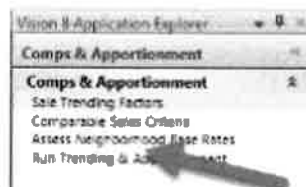
Code Assessing Neighborhoods

From: Residential To: TEST2 Copy

No neighborhoods on value bases. Unfreeze All Neighborhoods

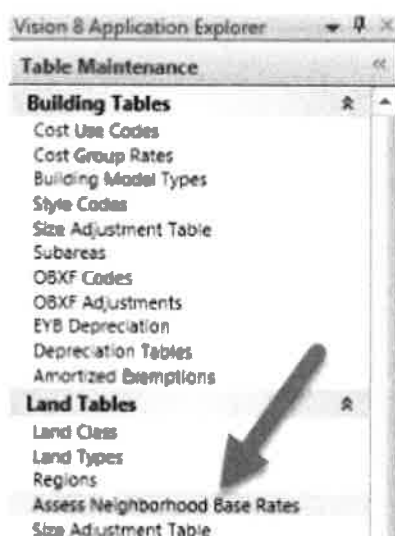
Building Type	From Status	Code	Description	Cost Model	Cost Trend Adj	Sale Trending	Comp Sale Type	Comp Trend Adj	Reg Model	Model Adj	Trend Factor	Adj #1	Adj #2	Adj #3
00 Vacant														
01 Residential		TEST2	Q3AD	Residential	1.000	RES	RS	1.000		1.000	1.000	1.000	1.000	
02 Mobile Homes		TEST1	Test 1	Residential	1.000	RES	RS	1.000		1.000	1.000	1.000	1.000	
04 Condo Sales		NCH1	NCH	Residential	1.000	RES	RS	1.000		1.000	1.000	1.000	1.000	
04 Rent Condo														

- If you use or plan to use Comparable Sales, you should repeat these steps for that table.

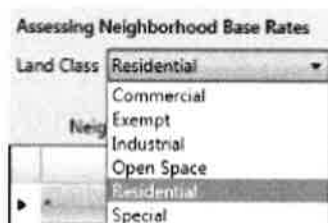


Section 2: Land Tables

- Click on **Table Maintenance** on the tree on the left side of the screen and select **Land Tables**. Click on **Assessing Neighborhood Base Rates**. Due to flexible labeling, your table may be labeled as **Neighborhood/Market Area Land Valuation** or another similar label.



- Select the desired **Land Class** for the new neighborhood code.



3. The left pane shows the list of current neighborhood codes. The right pane outlines the details of each neighborhood code within the selected **Land Class**. The top line of the right pane holds a plus sign (+) which denotes the row for new code configuration. Enter data for the new neighborhood code created in section 1. Once done, click **Apply**. *Note – The default sub-neighborhood code is typically 'A'.

Assessing Neighborhood Base Rates

Land Class Residential Filter Codes Like

Neighborhood

	Neighborhood	Sub NEH	SF Curve	Acres Curve	SF Curve	Std Size	Base Price	Size Adj	Val Src	2 Table	Reg Model	Front Base Price	front Adj	Depth Curve	Bs Base Price	Bldg tot Size
+	TEST1	A	1	1	1	1	1.00	NSZ	C					<input checked="" type="checkbox"/>		
02AD		A	1	1	1	1	1.00	NSZ	C					1		
02BC		A	1	1	1	1	1.00	NSZ	C					1		
02GA		A	1	1	1	1	1.00	NSZ	C					1		
02MC		A	1	1	1	1	1.00	NSZ	C					1		
02ME		A	1	1	1	1	1.00	NSZ	C					1		

Section 3: Neighborhood Factors / Street Index

If the Neighborhoods found on the Land Lines in Classification & Land Information are not the



same as your Assessing NBHDs, then do not complete these steps.

1. Click on **Table Maintenance** on the tree on the left side of the screen and select **Land Tables**. Click on **Neighborhood Factors**.



2. In the top row next to the plus (+) sign, enter the new **Code**, **Description**, and **Adjustment Factor**. Once complete, click **Apply**.

Neighborhood Factors			
	Code	Description	Nbhd Adj Factor
+	TEST2	Test Neighborhood 2	1.5
	02AD	ARBORDALE	1.000
	02BC	BANBURY CROSS	1.000
	02GA	FENTON MILL AREA	1.500
	02MC	MICHAEL COMMONS	1.000

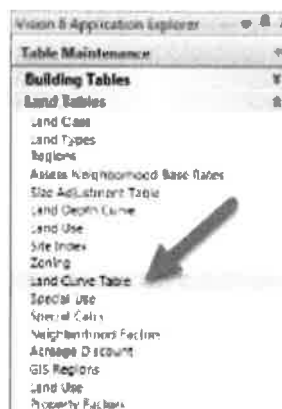
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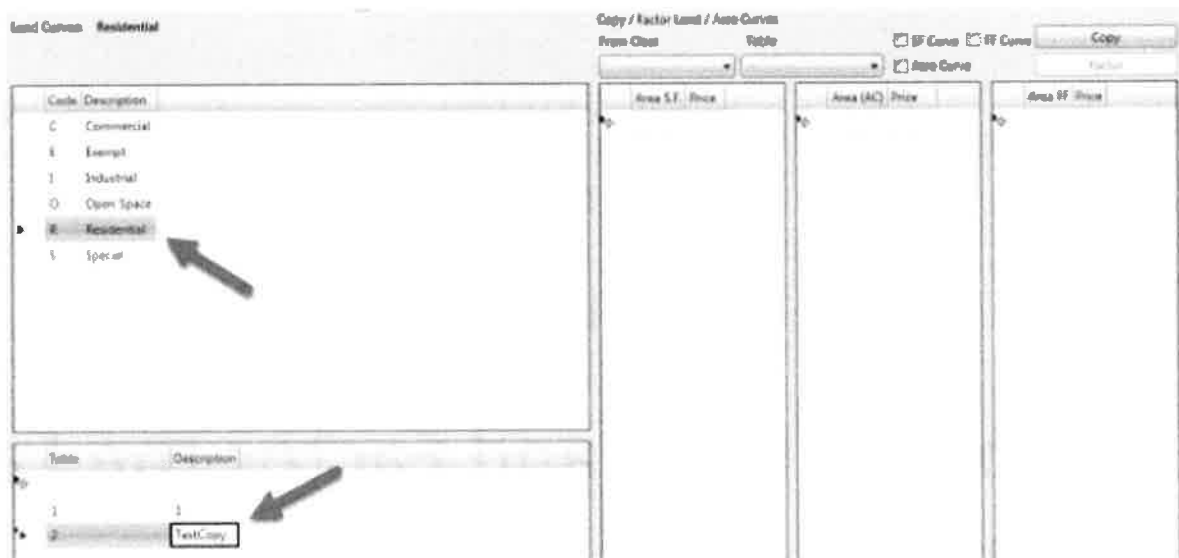
How To Copy and Factor the Land Curve

This document outlines the process to copy and factor the land valuation curves.

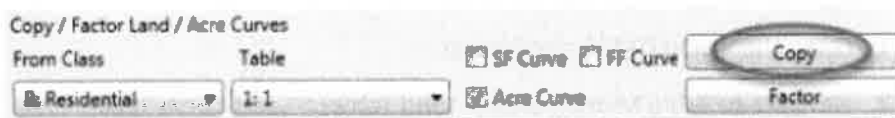
1. Open the Vision CAMA application.
2. Navigate to Table Maintenance > Land Tables > Land Curve Table



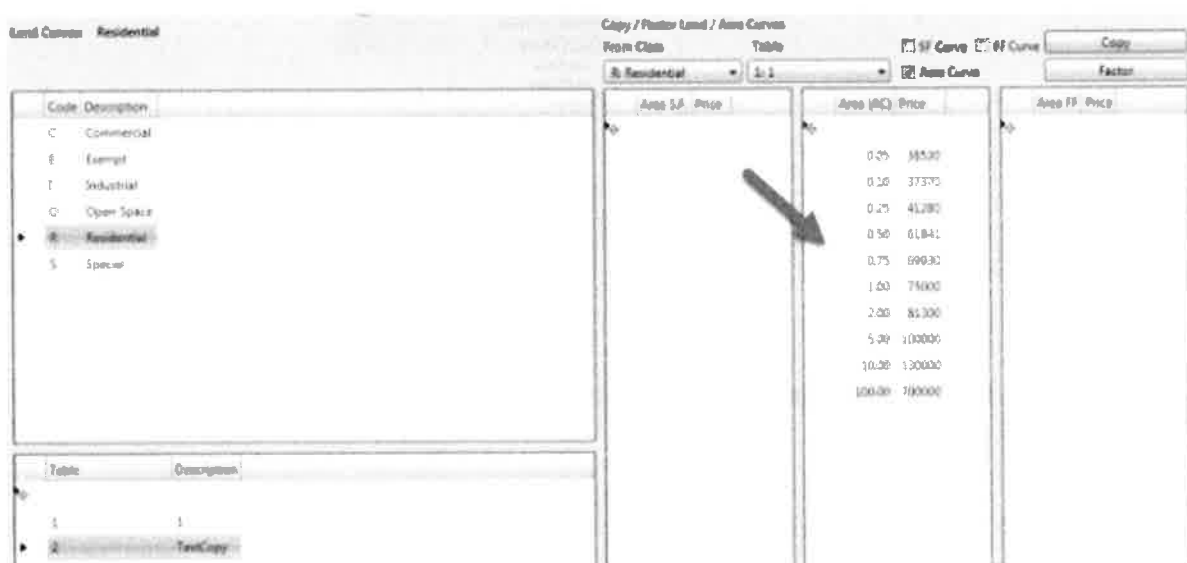
3. Identify the Target Land Class and Table ID for update.



4. In the **Copy / Factor Land / Acre Curves** section, select the Source land class, table, and desired curves. Once selected, click Copy.



5. The target curve(s) are then populated with the curves identified in step 4.



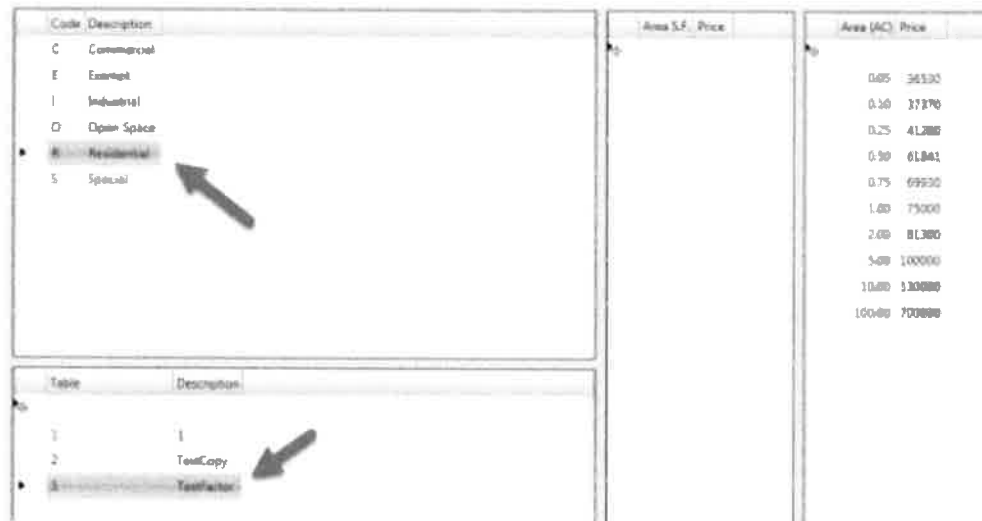
6. To accept the changes, click **Apply** at the bottom right hand corner of the screen. To undo changes, click **Revert**.

Land Curve Factoring

1. Open the Vision CAMA application.
2. Navigate to Table Maintenance > Land Tables > Land Curve Table



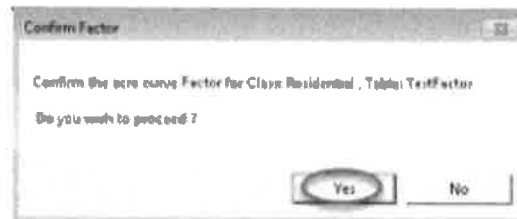
3. Identify the Target Land Class and Table ID for update.



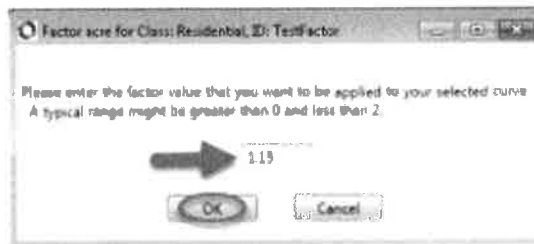
4. In the **Copy / Factor Land / Acre Curves** section, select the land class, table, and curves to factor, then click Factor.



5. Review the confirmation prompt and click Yes to proceed.



6. Enter the desired factor for the target curve(s) and click OK.



- Review the updated curve(s) and click OK. Then click **Apply** at the bottom right hand corner of the screen to accept changes, or **Revert** to undo.

Land Curves Residential

Copy / Factor Land / Area Curves

From Class Table

3. Residential 3. TestFactor

Area S.F. Price Area (AC) Price Area FT Price

Code	Description
C	Commercial
E	Employment
I	Industrial
O	Open Space
R	Residential
S	Special

Factor Result

Curve Table Factor succeeded.

OK

Table	Description
1	1
2	TestK,aby
3	TestFactor,ABZ,Factor

Apply Revert



Land Valuation Basics

This document outlines the foundational elements of Vision Land Valuation.

Disclaimer

▲ Please note that any alterations to the Land Tables will impact parcel valuation. There is no undo button to roll back changes once applied. Please verify that a valid database backup is in place prior to altering land tables. Additionally, you may wish to print land rate reports for reference before making changes. To do so, navigate to CAMA > Reports > Rate Files > Building and Land Rates, then select the desired reports under Land Reports, then click View Report. The existing land curves may be printed by navigating to CAMA > Reports > Rate Files > Land Curve Report, then selecting the desired criteria and clicking View Report.

Before We Begin

This documentation provides a basic overview of standard land valuation methods available in the Vision CAMA system and does not cover each potential configuration. Methodology for Special Use and Alternate Land pricing, which addresses valuation of special land including Farm, Forest, Pasture, etc. is excluded from this document. For advanced valuation, configuration assistance, or additional information please contact Customer Support.

Gathering Land Valuation Components

The Vision CAMA promotes various land valuation configurations. To follow methodology for a specific parcel or land line, it is advised that the user collect the following information as these items are referenced throughout this documentation.

Land Unit Type: Valuation methods are based largely in part on the unit type selected for each land line. The unit type may be viewed on the Classification and Land Screen.

Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type
1	1	1010	SINGLE FAM	1.7500	AC

Land Use Code: This is the use code assigned to the subject land line on the Classification and Land Screen.

Bldg #	Line #	Use Code	Use Code Description
1	1	1010	SINGLE FAM

Land Class: After identifying the land use code, navigate to Table Maintenance > Land Tables > Land Use and locate the code in the table. The Land Class column shows the land class assigned to the use code.

Code	Description	Land Cls	Land Type	Prim Bldg Use
1010	SINGLE FAM	R		1010

Building Use: While in Table Maintenance > Land Tables > Land Use, note the Primary Building Use code. (This item is shown in the above screen shot)

District: Navigate to Table Maintenance > Building Tables > Cost Use Codes and locate the Primary Building Use Code identified in the previous step. Note the 'Is Com', 'Is Cdu', 'Is Cdm', and 'Is Vac' flags.

Bldg Use	Description	Mdl	Is Com	Is Cdu	Is Cdm	Is Vac
1010	SINGLE FAM		NO	NO	NO	NO

If 'Is Com' is Yes, the commercial district / neighborhood is used.

If either 'Is Cdu' or 'Is Cdm' is Yes, the condo district / neighborhood is used.

If 'Is Vac' is Yes and the Land Class is R, the residential district / neighborhood is used.

If 'Is Vac' is Yes and the Land Class is not R, the commercial district / neighborhood is used.

If all Is flags are No, the residential district / neighborhood is used.

Parcel Assessing Neighborhood / District: Navigate to Parcel > Legal Information > Account Information: Assessing Neighborhoods and identify the appropriate district field based on the District explanation above.

Sub Neighborhood: On the Parcel > Classification and Land Information Screen, identify the Sub Neighborhood in the Land Valuation Neighborhoods section. If the Land Class is R, the parcel uses the residential sub neighborhood, otherwise the commercial sub-neighborhood is used.

Land Report

The Land.dat is a land valuation report outlining the land calculations for the current parcel. To access this report, select Utilities > Recalc Parcels > Recalc Reports > Land Report. The calculation report will display in a separate window, showing the complete calculation for each land line based on the current database configuration.

Land Pricing Methods

The subsequent sections detail the various land pricing methods in the Appraisal Vision CAMA software.

Land Curve Pricing

The primary land pricing methods used by Vision clients are the square foot and acre land curve pricing. The Vision CAMA allows for varying degrees of granularity in development and assignment of land curves. Square Foot curve pricing is selected by setting the land unit type to 'SF'. Acre pricing is selected by setting the land unit type to 'AC'. For acreage, also make sure that Use Acre Curve is enabled in ADMIN > Table Maintenance > Parameters Tables > Valuation Switches: Land Calculation Switches. Additionally, the system defaults to use of land line acres for unit price calculation, but enabling 'Use Total Acres for Acre Curve' will use the Total Acres for unit price calculations.

The Land Curves

Land Curves are configured in CAMA > Table Maintenance > Land Tables > Land Curve Table. One or more curves may be configured for each land class.

*Note – If Mitas Land Curve by Site Index is enabled in ADMIN > Table Maintenance > Parameters Tables > Valuation Switches: Land Calculation Switches, only the Residential and Commercial land curves are used in valuation. The residential curve is selected when a numeric site index is applied to the land line. The commercial curve is selected when an alpha site index is applied to the land line.



The image above shows a sample land curve screen. The top left pane shows the available land classes for which curves may be established. The bottom left pane indicates the available curves within that class. Each class used should have at least one 'Table' entry. The default entry is typically Table 1. Once the Land Class and Table ID are selected in the left panes, the right panes will display the associated Square Foot and Acre curves.

The land curve is calculated using interpolation and is based on the economy of scale. The user may enter as many or as few size/price points in the curve as desired so long as there is a 1 acre price in the acre curve, and a 43560 price in the square foot curve. When developing a curve, it is recommended that the user run the Land Curve Report (CAMA > Reports > Rate Files > Land Curve Report) to ensure no pricing anomalies are present in the calculation.

Finding the Curve

To calculate the land price before adjustments, first identify the land curve linked to the land line. To do so, locate the necessary components outlined in the Gathering Land Valuation Components section of this document.

After locating initial valuation components, determine if the Assessing Neighborhood is part of a Region. Navigate to Table Maintenance > Land Tables > Regions. Look for the Assessing Neighborhood in the table and note the assigned Region Code if present. *Note - This table setup is optional, and unused by many clients.

Next, navigate to Table Maintenance > Land Tables > Assessing Neighborhood Base Rates. Select the appropriate Land Class from the dropdown at the top of the screen.

In the left pane, select the appropriate Region Code if applicable, otherwise select the identified Assessing Neighborhood. The Base Rates by Neighborhood window will display all entries for that Land Class / Assessing Neighborhood combination. Most databases will show a single entry with a Sub Neighborhood of A. If multiple Sub Neighborhoods are used, locate the row with the appropriate Sub Neighborhood as indicated by parcel data.

Upon identification of the target row in Assessing Neighborhood Base Rates, note the Table ID in the SF Curve, and Acre Curve columns. This information indicates the Land Curve Table ID used for valuation.



The Land Curve Equation

$$((\text{LOW UNIT} * \text{LOW UNIT PRICE}) + (((\text{HIGH UNIT} * \text{HIGH UNIT PRICE}) - (\text{LOW UNIT} * \text{LOW UNIT PRICE})) * (\text{TOTAL UNITS} - \text{LOW UNITS}) / (\text{HIGH UNITS} - \text{LOW UNITS}))) / \text{TOTAL UNITS}$$

The above formula is used to calculate the land line value prior to any adjustments when either Square Foot or Acre pricing is used. The next section will walk through a sample land line calculation. For the sample line, the parcel is using the residential land class, and is set to use Table ID 1 for both the Acre and Square Foot Land Curves.

Sample Land Line:



Appropriate Land Curve Screen for Parcel/Land Line:

Land Curves: Residential

Copy / Factor Land / Acre Curves

From Class: Table

SP Curve

Acre Curve

Code / Description	Area (A), Price	Area (AC), Price
C Commercial	1000 34.25	0.01 50400
E Example	5000 10.43	0.05 57500
I Industrial	10000 6.12	0.10 72000
O Open Space	15000 4.65	0.25 78000
R Residential	20000 3.63	0.45 89900
S Service	30000 2.75	0.50 100000
	43990 2.05	0.60 103700
		0.75 109000
		0.92 112500
		1.00 115200
		1.25 122400
		1.50 126000
		1.84 129600
		2.00 133200
		2.50 140400
		2.75 144000
		2.98 149000

For the sample, the Unit Type is AC, so the calculation is based on the Acre Curve.

The subject lot size is 1.75 Acres which falls between 1.50 and 1.84 in the Acre Curve. Therefore, 1.50 is the Low Unit, 126000 is the Low Unit Price, 1.84 is the High Unit, and 129600 is the High Unit Price. The 1 Acre Price is 115200. This data is used to determine the land line price before adjustments as outlined in the calculations below.

The formula broken down:

Land Price = (LOW UNIT PRICE + ((HIGH UNIT PRICE - LOW UNIT PRICE) * ((TOTAL UNITS - LOW UNITS) / (HIGH UNITS - LOW UNITS)))) / TOTAL UNITS

$$\text{Land Price} = (126000 + ((129600 - 126000) * ((1.75 - 1.50) / (1.84 - 1.50)))) / 1.75$$

$$\text{Land Price} = (126000 + (3600 * 0.7352941176)) / 1.75$$

$$\text{Land Price} = (126000 + 2647.05882336) / 1.75$$

$$\text{Land Price} = 128647.05882336 / 1.75 = 73512.60504192$$

Influence Factor = Land Price / 1 Acre Price

$$\text{Influence Factor} = 73512.60504192 / 115200$$

$$\text{Influence Factor} = 0.6381302521$$

Land Line Value (before any adjustments) = Lot Size * 1 Acre Price * Influence Factor

$$\text{Land Line Value} = 1.75 * 115200 * 0.6381302521$$

$$\text{Land Line Value} = \mathbf{128,600} \text{ (Rounded per database settings)}$$

Building Classification And Land Line Valuation

Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Appraised Value
1	1	1010	SINGLE FAM	1.7500	AC	\$128,600.00

Building Lot Pricing

Building lot pricing is used when the user must assign a value based on the number of building lots. This is done by entering the number of building lots in the land unit field and setting the land unit type to 'BL'. Base building lot pricing and standard lot size information is set for each assessing neighborhood and may vary by land class.

Building Lot Table Setup

After locating initial valuation components outlined in the Gathering Land Valuation Components section of this document, determine if the Assessing Neighborhood is part of a Region. Navigate to Table Maintenance > Land Tables > Regions. Look for the Assessing Neighborhood in the table and note the assigned Region Code if present. *Note - This table setup is optional, and unused by many clients.

Next, navigate to Table Maintenance > Land Tables > Assessing Neighborhood Base Rates. Select the appropriate Land Class from the dropdown at the top of the screen.

In the left pane, select the appropriate Region Code if applicable, otherwise select the identified Assessing Neighborhood. The Base Rates by Neighborhood window will display all entries for that Land Class / Assessing Neighborhood combination. Most databases will show a single entry with a Sub Neighborhood of A. If multiple Sub Neighborhoods are used, locate the row with the appropriate Sub Neighborhood as indicated by parcel data.

Upon identification of the target row in Assessing Neighborhood Base Rates, note the BL Base Price and Bldg Lot size columns. The BL Base Price is the land unit price used when 'BL' is selected as the land unit type. The optional Bldg Lot Size column allows the user to enter the square footage for a building lot which is included in the total lot size calculation.

Base Rates by Neighborhood													
Neighborhood	Sub NEBH	SF Curve	Acre Curve	Std Size	Base Price	Size Adj	Val Src	Z Table	Reg Model	Front Base Price	Front Adj	Depth Adj	Bldg Lot Size
0050	A	1	1	1	100	N5Z	C						75,000.00

The Building Lot Equation

TOTAL UNITS * BL Base Price

The above formula is used to calculate the land line value prior to any adjustments when Building Lot pricing is used. The next section will walk through a sample land line calculation. For the sample line, the parcel is using the residential land class, and is set to use \$75,000 as the BL Base Price.

Land Line Value (before any adjustments) = TOTAL UNITS * BL Base Price

Land Line Value = 2 * 75000

Land Line Value = **\$150,000** (Rounded per database settings)

Building Classification And Land Line Valuation					
Block #	Line #	Use Code	Use Code Description	Land Units	Unit Type
1	1	1010-SINGLE FAM	SINGLE FAM	20000	BL
Land Line Value: 1.535547 Approved \$138,900.00					

Linear Foot Pricing

Linear foot pricing allows the user to assign a unit price based on linear footage of frontage or waterfront. This is done by entering the total number of linear feet in the land unit field and setting the land unit type to 'FF' for Front Footage, or 'WF' for Water Front. The unit price for this methodology is not table driven, therefore the site index must be set to '0' before assigning a unit price.

***Note** – Unit prices may be set individually, through the Mass Update utility, or through the Change Unit Prices utility.

The Linear Foot Equation

TOTAL UNITS * Unit Price

The above formula is used to calculate the land line value prior to any adjustments when Linear Foot pricing is used. The section below will walk through a sample land line calculation.

Land Line Value (before any adjustments) = TOTAL UNITS * Unit Price

Land Line Value = 200 * 75

Land Line Value = **\$15,000** (Rounded per database settings)

Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Appraised Value
1	1	1010	SINGLE FAM	200	FF	\$15,000.00

Frontage/Depth Pricing

Frontage/Depth pricing allows for calculation of a unit price per square foot, with adjustments based on land frontage and depth. To utilize this pricing method the unit type must be set to 'FD'.

Finding the Frontage/Depth Pricing Data

To calculate the land price before adjustments, first identify the base price, frontage adjustment, and depth curve linked to the land line. To do so, locate the necessary components outlined in the Gathering Land Valuation Components section of this document.

After locating initial valuation components, determine if the Assessing Neighborhood is part of a Region. Navigate to Table Maintenance > Land Tables > Regions. Look for the Assessing Neighborhood in the table and note the assigned Region Code if present. *Note - This table setup is optional, and unused by many clients.

Next, navigate to Table Maintenance > Land Tables > Assessing Neighborhood Base Rates. Select the appropriate Land Class from the dropdown at the top of the screen.

In the left pane, select the appropriate Region Code if applicable, otherwise select the identified Assessing Neighborhood. The Base Rates by Neighborhood window will display all entries for that Land Class / Assessing Neighborhood combination. Most databases will show a single entry with a Sub Neighborhood of A. If multiple Sub Neighborhoods are used, locate the row with the appropriate Sub Neighborhood as indicated by parcel data.

Upon identification of the target row in Assessing Neighborhood Base Rates, note the Front Base Price, Front Adj, and Depth Curve. The Front Base price is the starting unit price, which is subsequently adjusted based on the Frontage Adjustment and the Depth Curve.

Neighborhood	Sub Neighborhood	Acres	Base Price	Front Adj	Depth Curve
0001	A	40.000	7.10	1.00	1.00

The Frontage Adjustment

Frontage adjustments are configured in CAMA > Table Maintenance > Land Tables > Size Adjustment Table.

Size Adjustments		Cost Factors From Code	
Code	Description	Size	Adjust Factor
LBS	LBS	0.01	0.6500
LRS	LRS	0.25	4.4000
LR1	LR1	0.75	2.2700
NRSR	NRSR	1.00	1.5700
NRSA	NRSA	1.50	1.2100
NRZ	NRZ	2.00	1.0000
RSA	RSA	2.50	0.8600
SOS	SOS	3.00	0.7600
S10	S10	3.50	0.6800
S15	S15	4.00	0.6200
S20	S20	4.50	0.5700
S25	S25	5.00	0.4900

The Depth Curves

Depth Curves are configured in CAMA > Table Maintenance > Land Tables > Land Depth Curve.

Table Maintenance		Land Depth Curve		
Table ID	Description	Frontage	Depth	Adjustment
1	Default	200.00	50.00	0.7000
2	Default	200.00	100.00	0.8000
3	Default	200.00	150.00	0.9000
4	Default	200.00	200.00	1.0000
5	Default	200.00	250.00	1.1000

The image above shows a sample land depth curve screen. One or more depth curve may be entered. Curves are differentiated by their Curve ID. The default entry is typically Curve ID 1.

The Land Depth Curve Equation

Full Calculation: Total Units * (Base Price * Frontage Adjustment * Depth Adjustment)

Frontage Adjustment: $\text{LOW FACTOR} + ((\text{HIGH FACTOR} - \text{LOW FACTOR}) / ((\text{HIGH SIZE} * 100) - (\text{LOW SIZE} * 100))) * (\text{ACTUAL FRONTAGE} - (\text{LOW SIZE} * 100))$

Depth Adjustment: $((\text{LOW DEPTH} * \text{LOW ADJUSTMENT}) + (((\text{HIGH DEPTH} * \text{HIGH ADJUSTMENT}) - (\text{LOW DEPTH} * \text{LOW ADJUSTMENT})) * (\text{ACTUAL DEPTH} - \text{LOW DEPTH}) / (\text{HIGH DEPTH} - \text{LOW DEPTH}))) / \text{ACTUAL DEPTH}$

The above formula is used to calculate the land line value prior to any adjustments when Frontage/Depth pricing is used. The next section will walk through a sample land line calculation. The Assessing Neighborhood Base Rates table is configured to use \$2.30 as the Front Base Price, the LND adjustment curve, and Depth Curve ID 1.

Sample Land Line:

Land Details		Site On	
Block #	Line #	Site Address	
1	1	5: Reside	
Use Code	1010-SINGLE FAM	Unit Price	2.68
Zoning		Influence Factor	1.00000000
Frontage	175	Condition Factor	1.00
Depth	225	NRSA: RES	
Units	39275	Plat Adj	1.000
Unit Type	FD: Front Depth	Size Adjust	1.0000
Land Lot Type			
<input type="checkbox"/> Override Land Units			

Appropriate Frontage Adjustment Screen for Parcel/Land Line:

***Note** – The Total Units field is the product of the Frontage and Depth values. This may be overridden for final calculation by checking the 'Override Land Units' box, which will open the Total Units field for manual update.

Land Line Value (before any adjustments) = Total Units * (Base Price * Frontage Adjustment * Depth Adjustment)

Land Line Value = 40000 * (2.30 * 1.105 * 1.055555556)

Land Line Value = 40000 * (2.6826944)

Land Line Value = **107,300** (Rounded per database settings)

Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Appraised Value
1	1	1010	SINGLE FAM	40,000.0000	FD	\$107,300.00

Land Acres	0.918274	Appraised	\$107,300.00
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Land Adjustments

The next section outlines the various available land adjustments.

The following simple parcel is used for ease of explanation:

Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Appraised Value
1	1	100R	SFD - Urban Res	1.0000	AC	75,000.00
1	2	100R	SFD - Urban Res	5.0000	AC	25,000.00
1	3	100R	SFD - Urban Res	100.0000	AC	50,000.00

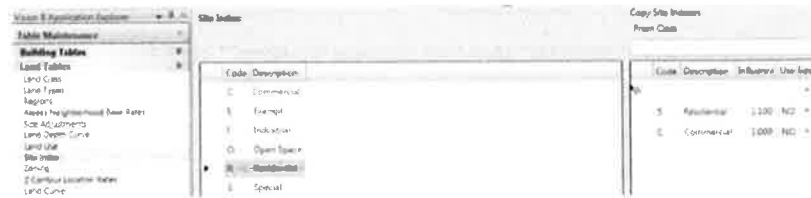
Land Acres	106	Appraised	\$150,000.00
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Land Details:

Site Index

The site index table is configured in Table Maintenance > Land Tables > Site Index. The primary function of the site index is to enable/disable table driven land pricing. Adjustments may also be configured based on street ranking, which is often used in jurisdictions lacking clear neighborhood delineation. This may also be used in conjunction with neighborhood factors. The default residential site index is 5, and the default commercial site index is C. Please reference prior notes regarding Mitas Land Curve by Site Index in the Land Curve Pricing section of this document.

Below is a sample Site Index table for demonstration.



The screenshot shows the 'Table Maintenance' window with 'Building Tables' selected. The 'Site Index' table is displayed with the following data:

Code	Description	Influence	Use Type
5	Residential	1.100	NO
C	Commercial	1.000	NO

When a site index is assigned to a Land Line, the Unit Price and Influence Factor become read only.

For the sample below, the land curve price for 1 acre in this database is \$75,000. Because site index 5 has an influence of 1.100, the Unit Price of \$75,000 is factored by 1.10 resulting in a final Unit Price of \$82,500.



The screenshot shows the 'Land Line' form with the following values:

Field	Value
Use Code*	100R: SFD - Urban Re
Land Type	
Unit Price	82500.00
Influence Factor	1.00000000
Condition Fac	1.00
Nbhd	
Nbhd Adj	1.000
Size Adjust	1.0000

On the right, the 'Site Index' dropdown is set to '5: Residi' and the 'Site Ov' dropdown is set to '0'. Arrows indicate the flow of data from the Site Index and Site Ov fields to the Unit Price and Influence Factor fields.

Unit Price Override

Site Index 0 allows for manual pricing when a line requires departure from table driven valuation methods. When the site index is changed to 0, the unit price and influence factor become enabled for user edit.

***Be sure to set the Influence Factor to 1 when manually updating the Unit Price.**



The screenshot shows the 'Land Line' form with the following values:

Field	Value
Use Code*	100R: SFD - Urban Re
Land Type	
Unit Price	75000
Influence Factor	1.00000000
Condition Fac	1.00
Nbhd	
Nbhd Adj	1.000
Size Adjust	1.0000

On the right, the 'Site Index' dropdown is set to '0: OV' and the 'Site Ov' dropdown is set to '0'. Arrows indicate the flow of data from the Site Index and Site Ov fields to the Unit Price and Influence Factor fields.

Neighborhood

The land neighborhood table is configured in Table Maintenance > Land Tables > Neighborhood Factors and allows for land adjustments based on neighborhood delineation.

Some municipalities opt to use the Assessing Neighborhood as the Land Neighborhood. This functionality may be enabled in ADMIN > Table Maintenance > Parameters Tables > Valuation Switches: Land NBHD Matches Assessing NBHD. When this is enabled, the Land Neighborhood field is auto-filled with the Assessing District and the field becomes read only. The user must ensure all Assessing Neighborhood codes are also present in the Neighborhood Factors table to avoid calculation errors. When this option is disabled, the Land Neighborhood field is enabled for user edit. Some jurisdictions opt to assign a neighborhood adjustment to only primary land, where others assign the neighborhood to all land lines. This is ultimately the decision of the municipality.

Below is an excerpt from a sample Neighborhood Factors table for demonstration.

Neighborhood Factors		
Code	Description	Nbhd Adj Factor
0001	Sample 1	1.100
0002	Sample 2	0.900

Selecting Sample 1 as the neighborhood for Land Line 1 populates the Nbhd Adj field with 1.1 which matches the adjustment factor from the table. Selecting Sample 2 for Land Line 2 results in a Nbhd Adj of 0.9. Land Line 3 will remain constant with no neighborhood assigned.

The first screenshot shows Land Line 1 with 'Nbhd' set to '0001 Sample 1' and 'Nbhd Adj' set to '1.1'. The second screenshot shows Land Line 2 with 'Nbhd' set to '0002 Sample 2' and 'Nbhd Adj' set to '0.9'. The third screenshot shows Land Line 3 with 'Nbhd' set to '' and 'Nbhd Adj' set to '1.000'.

With the Neighborhood Factors, the land now calculates as shown below.

Building Classification And Land Line Valuation									
Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Unit Price	Nbhd	Nbhd Adj	Appraised Value
1	1	100R	SFD - Urban Res	2.0000	AC	75,000.00	0001	1.100	\$2,500.00
1	2	100R	SFD - Urban Res	5.0000	AC	5,000.00	0002	0.900	22,500.00
1	3	100R	SFD - Urban Res	100.0000	AC	500.00		1.000	50,000.00
Land Acres				108	Appraised		\$155,000.00		

Special Calcs

The Special Calcs table is configured in Table Maintenance > Land Tables > Special Calcs and allows for table driven land line adjustments such as topography, water influence, and utility adjustments.

One or more special calcs may be assigned to each land line, and valuation impact is based on configuration in the Special Calcs table. The sample table below is used for subsequent demonstration. Please note that codes and descriptions used are present for the purposes of demonstration only.

Special Calcs						
Code	Unit Type	Description	Affect on Unit Pricing	Does This Affect Total	Price Adjustment	Factor
FCTADJ *		Factor Total Adjustment	ADJUST	YES *	0	0.75
FCUADJ *		Factor Unit Adjustment	ADJUST	NO *	0	0.75
FVTADJ *		Flat Value Total Adjustment	ADJUST	YES *	10,000	1.00
FVTREP *		Flat Value Total Replace	REPLACE	YES *	10,000	1.00
FVUADJ *		Flat Value Unit Adjustment	ADJUST	NO *	10,000	1.00
FVUREP *		Flat Value Unit Replace	REPLACE	NO *	10,000	1.00

Table Explanation:

Code: This is the special calc code.

Unit Type: This indicates for what unit type the code is available. If AC is entered, the calc will only be available for land lines having AC as the unit type. Entering * makes the code available for all land unit types.

Description: This is the special calc description.

Affect on Unit Pricing: This instructs the calculation to either ADJUST or REPLACE the land line value with the table defined value.

Does this Affect Total: If YES the adjustment impacts the total value, if NO then the adjustment applies to the unit price.

Price Adjustment: Entering a unit price will either ADJUST or REPLACE the indicated value with the value in the Price Adjustment column. If no Price Adjustment is to be used, the column is populated with 0.

Factor: Entering a Factor will adjust the indicated value with the table defined factor. If no Factor is used, the column is populated with 1.0.

Special Calc Samples

Land Line 1 from the sample parcel with a Neighborhood factor of 1.1 is used for the demonstrations below.

The screenshot shows the 'Land Details' form. Key fields include: 'Use Code' (100R, SFD - Urban R), 'Land Type' (), 'Unit Price' (75000.00), 'Influence Factor' (1.00000000), 'Condition Fee' (1.00), 'Mineral' (0000: Sample 1), 'Mineral Adj' (1.100), and 'Slope Adjust' (1.0000). The 'Unit Type' is set to 'AC: Acres'.

FCTADJ: Factor Total Adjustment (Factor applied to the Total Appraised Value)

The screenshot shows the 'FCTADJ' form. The 'Special Code' is 'FCTADJ'. The 'Total Appraised' value is \$1875 and the 'Assessed' value is \$1875. The 'Special Use' is set to '0'.

FCUADI: Factor Unit Adjustment (Factor applied to the Unit Price)

The screenshot shows the 'FCUADI' form. The 'Special Code' is 'FCUADI'. The 'Total Appraised' value is \$1875 and the 'Assessed' value is \$1875. The 'Special Use' is set to '0'.

FVTADJ: Flat Value Total Adjustment (Total Value adjusted by the Price Adjustment)

The screenshot shows the 'FVTADJ' form. The 'Special Code' is 'FVTADJ'. The 'Total Appraised' value is \$17500 and the 'Assessed' value is \$17500. The 'Special Use' is set to '0'.

FVTREP: Flat Value Total Replace (Total Value replaced with Price Adjustment)

The screenshot shows the 'FVTREP' form. The 'Special Code' is 'FVTREP'. The 'Total Appraised' value is 117000 and the 'Assessed' value is 117000. The 'Special Use' is set to '0'.

FVUADI: Flat Value Unit Adjustment (Unit Price adjusted by Price Adjustment)

FVUREP: Flat Value Unit Replace (Unit Price replaced with Price Adjustment)

FVUREP & FCUADJ: Flat Value Unit Replace & Factor Unit Adjustment

**Note – Special Calc rounding precision may be set in ADMIN > Table Maintenance > Parameters Tables > Rounding.*

Property Factor Adjustments

Property Factor Adjustments allow for property factors assigned at the parcel level to impact land line calculations. These adjustments are configured in Table Maintenance > Land Tables > Property Factors.

Property Factor	Code	Description	% Adjustment	\$ Adjustment	Is \$ Adjustment	Apply to Total	Land Line 1 Only	Apply to Res	Apply to Com	Apply to Condo	Apply to Main	Apply to Vacant
14	Topo Adj Sample		1.000									

Table Explanation:

Code: This is the property factor code.

Description: This is the property factor description.

% Adjustment: This is the adjustment factor if 'Is \$ Adjustment' is unchecked.

\$ Adjustment: This is the adjustment amount if 'Is \$ Adjustment' is checked.

Is \$ Adjustment: Indicates whether an adjustment factor or dollar amount is applied.

Apply to Total: If checked the adjustment impacts the total value, if unchecked then the adjustment applies to the unit price.

Land Line 1 Only: If checked, the adjustment only applies to Land Line 1. If unchecked, the adjustment applies to all land lines.

Apply to Res: If checked, the factor applies to Residential parcels.

Apply to Com: If checked, the factor applies to Commercial parcels.

Apply to Condo: If checked, the factor applies to Condo parcels.

Apply to Main: If checked, the factor applies to Condo Main parcels.

Apply to Vacant: If checked, the factor applies to Vacant parcels.

Property Factor Sample

The image below shows the sample parcel when Code 14: Topo Adj Sample is selected as Property Factor 1. Note that only the Land Line 1 total is impacted by the code as per table settings.

Building Classification And Land Line Valuation							
Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Unit Price	Appraised Value
1	1	100R	SFD - Urban Res	20.10000	AC	75,000.00	97,500.00
1	2	100R	SFD - Urban Res	5.0000	AC	5,000.00	25,000.00
1	3	100R	SFD - Urban Res	100.0000	AC	500.00	50,000.00
Land Acres				105	Appraised	\$172,500.00	

The next sample shows the impact of adding Code 02: Gravel to the Street/Road property factor.

Code	Description	% Adjustment	\$ Adjustment	Is \$ Adjustment	Apply to Total	Land Line 1 Only	Apply to Res
00	N/A	1.000		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01	Paved	1.000		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02	Gravel	1.000	-5.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Building Classification And Land Line Valuation							
Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Unit Price	Appraised Value
1	1	100R	SFD - Urban Res	20.10000	AC	75,000.00	\$2,500.00
1	2	100R	SFD - Urban Res	5.0000	AC	5,000.00	20,000.00
1	3	100R	SFD - Urban Res	100.0000	AC	500.00	45,000.00
Land Acres				105	Appraised	\$157,500.00	

Acreage Discount

Acreage Discount Factors provide adjustments based on lot size. This is enabled in ADMIN > Table Maintenance > Parameters > Valuation Switches: Use Acreage Discount. Once enabled, determine if acreage discount factors will be applied based on Total Acres, or individual Line Acres. The system defaults to Line Acres but enabling 'Use Total Acres instead of Line Acres' allows the application of the discount factor to all approved lines when the total acreage warrants adjustment based on table configuration. Individual Land Lines may be excluded from acreage discount by checking 'Exclude from Acreage Discount' in the Land Details screen.

Calculation Settings & Switches

Land Calculation Switches

- ☒ Miles Land Curve by Site Index
- ☒ Use Acre Curve
- ☒ Convert Land Line Total Land Units To Acres
- ☐ Verify Zone Code against table
- ☒ Increase Land Curve Scale and Precision
- ☐ Land NBHD Matches Assessing NBHD
- ☒ Version 6.2 Land Special Use Calc
- ☒ Use Acreage Discount
- ☐ Use Total Acres For Acre Curve
- ☒ Use Front Foot Curve
- Acreage Discount Options
 - ☒ Use Total Acres instead of Line Acres

The Acreage Discount Table

Acreage Discount Factors are configured by Land Class in CAMA > Table Maintenance > Land Tables > Acreage Discount.

***Note** – The Acreage Discount factor is applied based on table entries, not interpolation. This means that if the subject acreage falls between two table entries, the closest table entry less than or equal to the subject acreage is used for discount factor assignment. Based on the sample table shown below, a subject having 115 Acres will receive an acreage discount of 0.97.

Percentage Discount		Copy Acreage Discount From Class	
Code	Description	Acreage	Discount Factor
C	Commercial		
E	Exempt		
I	Industrial		
O	Open Space		
R	Residential	10	1.0000
S	Special	50	0.9900
		75	0.9800
		100	0.9700
		125	0.9600
		150	0.9500
		175	0.9400
		200	0.9300
		250	0.9150
		500	0.8500

Acreage Discount Sample

The image below shows the valuation when 'Use Total Acres instead of Line Acres' is enabled in Admin. The parcel has a total of 106 acres, resulting in an acreage discount adjustment of 0.97. Additionally, Land Line 1 is excluded from Acreage Discount, therefore the factor is only applied to land line 2 and land line 3.

Building Classification And Land Line Valuation						
Bldg #	Line #	Use Code	Use Code Description	Land Units	Unit Type	Unit Price
1	1	100R	SFD - Urban Res	1.0000	AC	75,000.00
	2	100R	SFD - Urban Res	5.0000	AC	5,000.00
	3	100R	SFD - Urban Res	100.0000	AC	500.00

Price Adjustments

Price adjustments allow for assignment of up to eight free-form adjustments to each land line. These adjustments are enabled first in ADMIN > Table Maintenance > Parameters Tables > General by checking the boxes next to the desired 'Use Lnd * as PriceAdj', then entering the maximum value in the associated Max Val field. Once enabled, navigate to ADMIN > Configurations of Vision 8 > Real Estate > Land Details and assign labels, a pick key, and a sort order to each desired field.

Once enabled, the adjustment fields appear on the Land Details screen.

The screenshot shows the 'Land Details' form with the following fields and values:

- Use Code:** 100R, SFD - Urban Res
- Land Type:** [Dropdown]
- Unit Price:** 75,000.00
- Influence Factor:** 1.00000000
- Condition Fee:** 1.00
- Depth:** [Dropdown]
- Width:** [Dropdown]
- Width Adj:** [Dropdown]
- Size Adjust:** 1.0000
- Adjustment 1 through 8:** [Dropdowns]
- Special Calc:** [Dropdown]
- Notes:** [Text Area]
- Special Use:** [Dropdown]
- Override Appraised Land Value:** [Checkbox]
- Override Assessed Land Line Value:** [Checkbox]
- Totals:** Appraised: 75000, Assessed: 75000

Adjustment fields are paired. The first field allows for selection of an adjustment type or note from the assigned pick list. The second field stores the desired adjustment.

This close-up shows the first pair of adjustment fields:

- Adjustment 1:** [Dropdown] 1.50
- Adjustment 2:** [Dropdown]
- Adjustment 3:** [Dropdown]
- Adjustment 4:** [Dropdown]
- Adjustment 5:** [Dropdown]
- Adjustment 6:** [Dropdown]
- Adjustment 7:** [Dropdown]
- Adjustment 8:** [Dropdown]

The screenshot shows the 'Land Details' dialog box with the following fields and values:

- Step:** 1
- Line #:** 1
- Use Code:** 100R SFD - Urban R/L
- Land Type:** [Dropdown]
- Unit Price:** 75000.00
- Franchise:** [Dropdown]
- Influence Factor:** 1.00000000
- Depth:** [Dropdown]
- Condition Fac:** 1.00
- Total Units:** 1.000
- Units:** 1.0000
- Unit Type:** AC/ Acres
- Size Adjust:** 1.0000
- Adjustment 1:** Sample Adjustment 1.50
- Adjustment 2:** Sample Adjustment 0.90
- Adjustment 3:** Sample Adjustment 1.10
- Adjustment 4:** Sample Adjustment 0.75
- Adjustment 5:** [Dropdown]
- Adjustment 6:** [Dropdown]
- Adjustment 7:** [Dropdown]
- Adjustment 8:** [Dropdown]
- Special Call:** [Dropdown]
- Notes:** [Text Area]
- Special Use:** [Dropdown] 0 100.00 %
- Override Approved Land Value:** [Checked]
- Override Assessed Land Line Value:** [Unchecked]
- Totals:**
 - Approved:** 75000
 - Assessed:** 91500
- Buttons:** Next, Add, Cancel, Close

When multiple adjustments are applied to a land line, they are multiplied together to obtain the Total User Value Adjustments, which is then used in the Total Adjustment Calculation. The relevant portion of the Land.dat showing the adjustment calculation is shown below.

```

User Value Adjustments 1 = 1.50
*****
User Value Adjustments 2 = 0.90
*****
User Value Adjustments 3 = 1.10
*****
User Value Adjustments 4 = 0.75
*****
Total User Value Adjustments = 1.11375000

```

Condition Factor

The condition factor field allows for manual entry of an adjustment factor. This is typically done when an atypical adjustment is warranted, and alternate adjustment methods do not work. Users then document the adjustment in the Notes field.

The screenshot shows the 'Land Details' dialog box with the following fields and values:

- Step:** 1
- Line #:** 1
- Use Code:** 100R SFD - Urban R/L
- Land Type:** [Dropdown]
- Unit Price:** 75000.00
- Franchise:** [Dropdown]
- Influence Factor:** 1.00000000
- Depth:** [Dropdown]
- Condition Fac:** 0.95
- Total Units:** 1.000
- Units:** 1.0000
- Unit Type:** AC/ Acres
- Size Adjust:** 1.0000
- Adjustment 1:** [Dropdown]
- Adjustment 2:** [Dropdown]
- Adjustment 3:** [Dropdown]
- Adjustment 4:** [Dropdown]
- Adjustment 5:** [Dropdown]
- Adjustment 6:** [Dropdown]
- Adjustment 7:** [Dropdown]
- Adjustment 8:** [Dropdown]
- Special Call:** [Dropdown]
- Notes:** Court Ordered Adjustment - 12/25/18
- Special Use:** [Dropdown] 0 100.00 %
- Override Approved Land Value:** [Checked]
- Override Assessed Land Line Value:** [Unchecked]
- Totals:**
 - Approved:** 67500
 - Assessed:** 67500
- Buttons:** Next, Add, Cancel, Close

Putting Adjustments Together

The next section outlines the land calculation when multiple adjustments are combined. The following sample focuses on Land Line 1 with the following criteria:

1 Acre Land Curve Unit Price: \$75,000

Neighborhood 0002: Factor 0.90

Site Index 5: Factor 1.10

Acreage Discount Factor: 0.97

Special Calc FCUADJ: Factor 0.75

Special Calc FVTADJ: Adjustment \$10,000

Price Adjustment 1: Factor 1.05

Price Adjustment 2: Factor 1.15

Topo 1 Code 14: Factor 1.30

Street/Road Code 02: Adjustment -\$5,000

Detailed calculation for Land Line 1 above derived from the land.dat report:

Land Use Code = 100R

Base District = 0001

Find the region for a group and district

Land Group = R

Region = District, Region not defined

Base Sub District = A

Z Contour = 0.0000

District Standard Size = 1

District Base Price Size = 1.00

District Size Adjustment = NSZ

Land group based Value Source = C

Calculate the land unit price using site index land curve method

Initial Curve Class R

Land Curve by Site Index Option

Site Index 5 New Curve Class R

Initial Unit Price 82500.00

Interpolate/Extrapolate from curve table id 1

Calculate Acre Land Curve

Entered Units 1.0000

Entered Unit Price 82500.00

Get 1 Acre Price

1 Acre Price for Acre Curve = 75000

Exact Match Found

Land Price 75000

Unit price is shown as whole acre price

New Land Price 75000 * 1.100

New Land Price 82500.000

New Unit Price 82500.000
 New Influence Factor 82500.000 / 82500.000
 New Influence Factor 1
 District pricing based unit_type value = 82500.000

 Special Calc FCUADJ adjusts unit price
 Special Calc FCUADJ adjusted unit price = unit price (82500.00) + Adjustment (0) * Factor (0.75)
 Special Calc FCUADJ adjusted unit price = 61875.00
 Total property factor adjustment = Line 1 only adjustments (1.300) * Other adjustments (1)
 Total property factor adjustment = 1.300
 Unit price with property factor adjustments applied = 61875.0000 * 1*1.300
 Unit price with property factor adjustment applied = 80437.5000000
 Unit price with property factor sum adjustment applied = 61875.0000 + Line 1 Only (0) + Other Adjustments (0)
 Unit price with property factor sum adjustment applied = 61875.0000
 Acreage discount 0.9700
 Acreage discount based on 106.0000 line acres
 User Value Adjustments 1 = 1.050

 User Value Adjustments 2 = 1.150

 Total User Value Adjustments = 1.207500

 Total adjustment a = 0.9700 * 1 * 1.02 * 0.900 * 1.207500
 Total adjustment a = 1.075230450000000
 Land Value = 86486.40000000000 * 1.0000
 Land Value Rounded = 86500

 Special Calc FVTADJ adjusts total land price
 Special Calc FVTADJ adjusted total land = land price (86500) + Adjustment (10000) * Factor (1.00)
 Special Calc FVTADJ adjusted total land = 96500.00
 Special Calc Land Value = 96500

 Total Value factor adjustment = Line 1 only adjustments (1) * Other adjustments (1)
 Total Value property factor adjustment = 1
 Total Value with property factor adjustments applied = 96500 * 1*1
 Total Value with property factor adjustment applied = 96500
 Total Value with property factor sum adjustment applied = 96500 + Line 1 Only (0) + Other Adjustments (-5000)
 Total Value with property factor sum adjustment applied = 91500



How To Add a Sub-Area Code for Sketches

This document demonstrates how to add new sub-area codes to Vision for use in the Sketch tool.

From the left-hand menu tree in CAMA select Table Maintenance > Building Tables > Subareas.



The screen will display two panes. The left-hand pane contains the list of available codes for use in the sketch module. The right-hand pane displays the valuation configurations for the code selected in the left-hand pane. The subarea code is available to all model types listed in the Model column of the left-hand pane. Appraisal Vision allows classic effective area pricing or the square foot pricing option for each subarea code / model combination.

Effective % reflects the percent of the subarea's calculated gross area that will be applied to value if **Use Square Foot Price** is unchecked.

SFLA reflects the percent of the subarea's gross area that is calculated as living area. This total does not impact valuation unless configured to do so through the Cost Model.

Square Foot Price denotes the unit price multiplied by the subarea's gross area which is added to the value calculation if **Use Square Foot Price** is checked.

Use Grade indicates whether the subarea value is impacted by Grade factors and other multipliers present in the cost model when **Use Square Foot Price** is checked. When **Use Grade** is checked, the value is added prior to applying multipliers. When unchecked, the value is added after application of multipliers.

Classic Effective Area Pricing

*For this method, the **Use Square Foot Price** is unchecked. Any data listed in the **Square Foot Price** or **Use Grade** columns will not be included in the building valuation.

The first example below demonstrates the sample configuration for **Code BAS** (First Floor Finished). It is applicable to all model types, will value at 100% of the gross area per the **Eff. %** column, and the **SFLA** column indicates that it calculates living area at 100% of the gross area.

Subarea

Copy Section
From Code
ACF Office

Code	Description	Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price
00	Vacant	00	100	1.00	GL	\$0.00		
01	Residential	01	100	1.00	GL	\$0.00		
02	Mobile Home	02	100	1.00	GL	\$0.00		
03	Multi Family	03	100	1.00	GL	\$0.00		
04	Condo Main	04	100	1.00	GL	\$0.00		
05	Res Condo	05	100	1.00	GL	\$0.00		
06	Condo	06	100	1.00	GL	\$0.00		
07	Commercial	07	100	1.00	GL	\$0.00		
08	Serv Station	08	100	1.00	GL	\$0.00		
09	Industrial	09	100	1.00	GL	\$0.00		

The second example FHS (Half Story) is also available for all model types but lists an **Eff. %** of 50, resulting in 50% of the gross area applied to the base rate. The **SFLA** column indicates that 50% of the gross area is added to the square foot of living area total.

Subarea

Copy Section
From Code
ACF Office

Code	Description	Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price
00	Vacant	00	50	0.50	UL	\$0.00		
01	Residential	01	50	0.50	UL	\$0.00		
02	Mobile Home	02	50	0.50	UL	\$0.00		
03	Multi Family	03	50	0.50	UL	\$0.00		
04	Condo Main	04	50	0.50	UL	\$0.00		
05	Res Condo	05	50	0.50	UL	\$0.00		
06	Condo	06	50	0.50	UL	\$0.00		
07	Commercial	07	50	0.50	UL	\$0.00		
08	Serv Station	08	50	0.50	UL	\$0.00		
09	Industrial	09	50	0.50	UL	\$0.00		

Square Foot Pricing

*For this method, the **Use Square Foot Price** is checked. Any data listed in the **Eff. %** column will not be included in the building valuation.

The first example shows the configuration for **Code PTO** (Patio). It is applicable to all model types, will value at \$5 per square foot of calculated gross area per the **Square Foot Price** column, and the value is not impacted by any multiplier cost models because **Use Grade** is unchecked. The **SFLA** column indicates that no area is added to the SFLA total for this subarea.

Subarea

Copy Section
From Code
ACF Office

Code	Description	Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price
00	Vacant	00	0	0.00	GL	\$5.00		
01	Residential	01	0	0.00	GL	\$5.00		
02	Mobile Home	02	0	0.00	GL	\$5.00		
03	Multi Family	03	0	0.00	GL	\$5.00		
04	Condo Main	04	0	0.00	GL	\$5.00		
05	Res Condo	05	0	0.00	GL	\$5.00		
06	Condo	06	0	0.00	GL	\$5.00		
07	Commercial	07	0	0.00	GL	\$5.00		
08	Serv Station	08	0	0.00	GL	\$5.00		
09	Industrial	09	0	0.00	GL	\$5.00		

The second example shows the configuration for **Code DCK** (Deck). It is applicable to all model types, will value at \$10 per square foot of calculated gross area per the **Square Foot Price** column, and the value is affected by multiplier cost models because **Use Grade** is checked. The **SFLA** column indicates that no area is added to the SFLA total for this subarea.

Subareas

Copy Rows
From Code

ACF Office

Code	Description	Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price
DCR	Deck	00: Vacant	*	0	0.00	GL		
EAF	Area, Expansion, Finished	01: Residential	*	0	0.00	GL		
EAG	Area, Expansion, Unfinished	02: Mobile Home	*	0	0.00	GL		
PAT	Area, Finished	03: Multi-Family	*	0	0.00	GL		
BEM	Basement, Finished	04: Condo Main	*	0	0.00	GL		
ACE	Capena, Induced, Finished	05: Res Condo	*	0	0.00	GL		
ACP	Carport	06: Com Condo	*	0	0.00	GL		
EDC	Carport, Finished, detached	08: Commercial	*	0	0.00	GL		
EDG	Garage, Finished, detached	09: Serv Station	*	0	0.00	GL		
EDS	Porch, screen, finished, detached	06: Industrial	*	0	0.00	GL		
EDU	Utility, Finished, detached							

Adding a Subarea Code

Click in the **Code** field next to the plus sign (+) at the top left-hand corner of the left-hand pane.

Subareas:

Code	Description
DCR	Deck

Then Enter the **Code** (up to 6 characters) and a **Description** (up to 40 characters)

Subareas:

Code	Description
TESTCD	Sample Subarea Code

With the new **Code** selected in the left-hand pane, enter the desired factors in the right-hand pane. Create one entry for each **Model** for which the code is permitted.

Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price

Use the drop-box provided to select the appropriate **Model** type.

Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price
00: Vacant						
01: Residential						
02: Mobile Home						
03: Multi-Family						
04: Condo Main						
05: Res Condo						
06: Com Condo						
08: Commercial						
09: Serv Station						
06: Industrial						

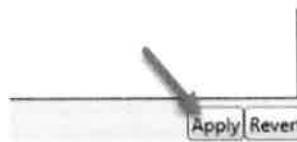
If using *Classic Effective Area Pricing* for this **Code** and **Model**, uncheck **Use Square Foot Price**, then enter the **Eff. %** factor, and **SFLA** factor.

Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price
01: Residential	100	1.00		\$0.00	<input type="checkbox"/>	<input type="checkbox"/>

If using **Square Foot Pricing** for this **Code** and **Model**, check **Use Square Foot Price**, enter the **SFLA** factor, the **Square Foot Price** (rate), and then indicate if the value will **Use Grade** factors and other multipliers configured in the cost model.

Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price
01: Residential	0	0.00		\$20.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Click **Apply** in the lower right-hand corner of the screen to save the new code.



Note: Factors may also be copied from an existing subarea code as demonstrated below.

Click in the **Code** field next to the plus sign (+) at the top left-hand corner of the left-hand pane.

Subareas:	
Code	Description
+	
DCX	Deck

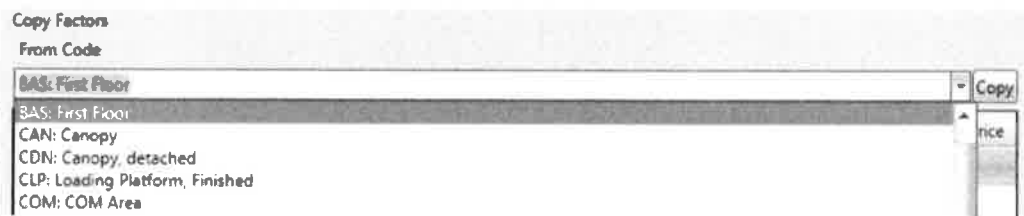
Then Enter the **Code** (up to 6 characters) and a **Description** (up to 40 characters)

Subareas:	
Code	Description
+	
SAMPLE	Sample Subarea Copy Code
RES	RES Area

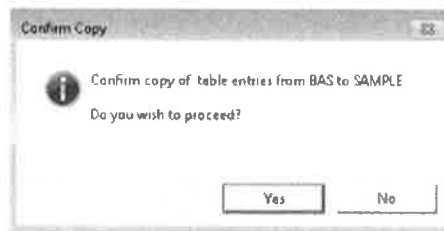
With the new **Code** selected in the left-hand pane, select the row with the plus sign (+) in the right-hand pane.

Copy Factors From Code						
AOF: Office						
Model	Eff. %	SFLA	Income Area	Square Foot Price	Use Grade	Use Square Foot Price

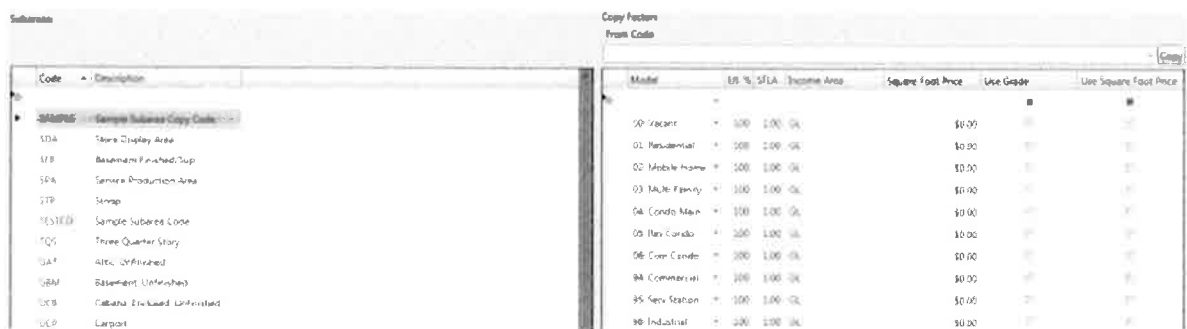
In the **From Code** drop-box, select the source code containing the factors you wish to copy to the **Code** selected in the left-hand pane and click **Copy**.



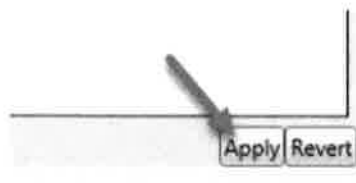
Review the source and target codes for the update and click **Yes** to proceed.



The new **Code** factors now match the source factors.



Click **Apply** in the lower right-hand corner of the screen to save the new **Code**.

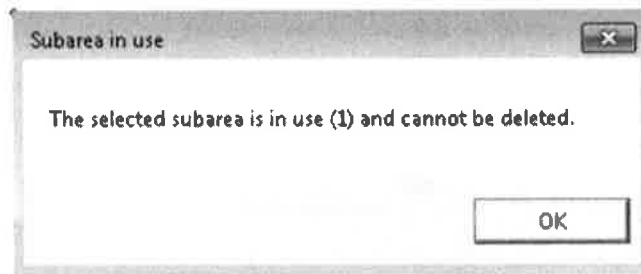



Note: To remove an entry from a table, highlight the record and select the **Delete** key on the keyboard. A confirmation message will appear. Choose **Yes** to delete the record, or **No** to cancel the deletion.

Warning: Deletion of codes in use in the CAMA application may result in undesired value changes. Please ensure you have a valid database backup prior to deletion.



If Yes is selected but the Subarea **Code** is in use, a message will appear indicating that the subarea cannot be deleted. Parcels using the indicated subarea code may be located using the report wizard.



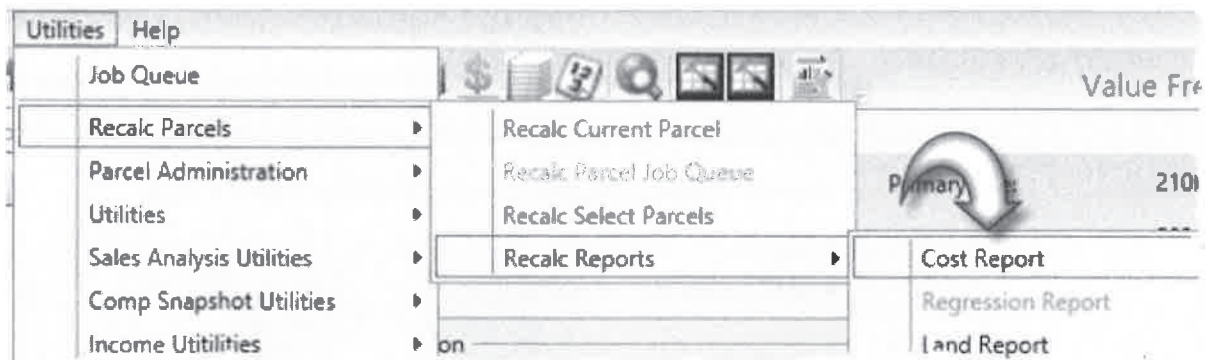
 **Note:** The **Delete** process works the same way, whether deleting a Subarea code entirely, or any individual Factor assigned to a Subarea code



Understanding the Building Size Curve Calculation

This document will explain the Table Maintenance, Building Tables, Size Curve Calculation. This document, in conjunction with the associated spreadsheet, demonstrates the size curve calculation.

1. Go to the **Utilities > Recalc Parcels > Recalc Reports > Cost Report**.



2. This will open to the **Cost Report** screen. This screen shows the calculated **Size Adjustment**.

OUTPUT FROM NEW COST MODELING ENGINE
REPORT GENERATED ON 13-Jan-2016 AT 07:38

*****Building #1 Calc Start*****

Cost Calculation for pid, bid = 12779, 12779
Account Number = 0468600NN01000
Use Code = 210R
Cost Rate Group = SIN
Model ID: = P01

Section #1
Section Use: Single Family
Base Rate: 54.33
Size Adjustment: 1.05463
Effective Area: 2750



*Note – To more easily follow the steps below, please reference the associated Excel document:
V8_Misc_Calcs.xlsx.

A screen shot of the worksheet is also available at the end of this document.

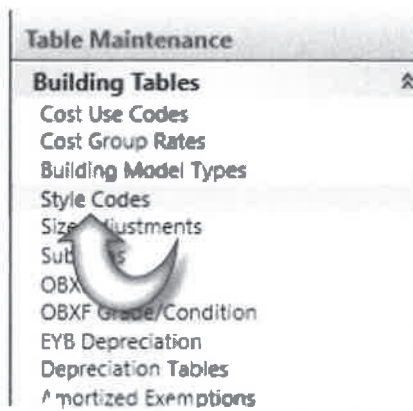
3. To determine the size adjustment the user must first gather the pertinent variables.

a. Parcel > Building Information > Construction Details > **Style**

b. Parcel > Building Information > Depreciation > **Effective Area**

Section Summary					
Group	SIN	Effective Area	2750		
Base Rate	54.33	RCN	136,876.85		
Eff Base Rate	\$80.68	Bldg % Good			
Net Other Adj	\$136,876.85	RCNLD			
Living Area	2750				
Code	Description	Gross	Living	Eff Area	
AVGAR	Garage, Average Quality	572	0	0	
DECK	Deck, Average Quality	154	0	0	
FINLA	Finished Living Area	2750	2750	2750	

c. Table Maintenance > Building Tables > Style Codes – Find the indicated Style code (3a) from above, and determine the **Size Adjustment Code**



Style Codes

Style: A - All Property Types

	Code	Description	Res	Cmrc	Condo Unit	Condo Main	Vacant	Min Stories	Max Stories	Size Adj	Std Size
▶	35	2 Sty Transitional	YES	NO	NO	NO	NO	0	999	B02E	4,100

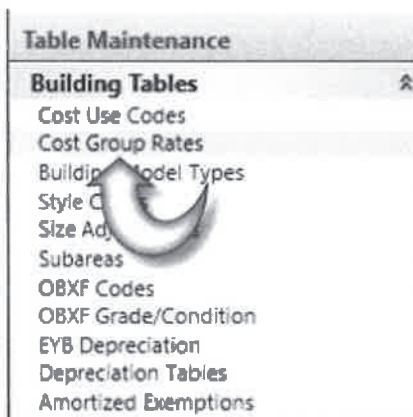
- d. Table Maintenance > Building Tables > Style Codes – Find the indicated Style code (3a) from above, and determine the **Standard Size**

Style Codes

Style: A - All Property Types

	Code	Description	Res	Cmrc	Condo Unit	Condo Main	Vacant	Min Stories	Max Stories	Size Adj	Std Size
▶	35	2 Sty Transitional	YES	NO	NO	NO	NO	0	999	B02E	4,100

- e. Table Maintenance > Building Tables > Cost Group Rates – Find the indicated Style Code (3a) from above, and determine the **Size Adjustment %**



Cost Group Rates

Factor Base Rate

Select Group:

<ALL>

	Group	Style	Description	Base Rate	Dpr Table	Size Adj %	Econ Life	Max Dpr	Max Age
▶	SIN	35	2 Sty Transitional	54.33	4	100	80	99	99

4. With known variables, the first calculation determines the **Size Percentage**

a. $(10,000 / \text{Standard Size}) * [\text{Effective Area} * (\text{Size Adjustment \%} / 100)]$

Example:

$(10,000 / 4,100) * [2,750 * (100 / 100)]$

Size Percentage = **6,707.317073**

5. For future calculations, divide the **Size Percentage (SP)** by 100

a. $(\text{Size Percentage} / 100)$

Example:

$(6,707.317073 / 100)$

Size Percentage Lookup = **67.07317073**

6. Table Maintenance > Building Tables > Size Adjustments - Find High Units

a. 1 Value Higher than 5a – $(\text{Size} * 100)$

Vision 7 Application Explorer

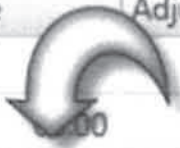
Table Maintenance	
Building Tables	
Cost Use Codes	
Cost Group Rates	
Building Model Types	
Style Codes	
Size Adjustments	←
Subareas	
OBXF Codes	
OBXF Grade/Condition	

Size Adjustments:

B02E

Code	Description
B02C	B02C
B02D	B02D
B02E	B02E

Size	Adjust Factor
66.00	1.0600
68.00	1.0500



Example:


$$(68 * 100)$$

High Units = **6,800**

7. Table Maintenance > Building Tables > Size Adjustments - Find Low Units

- a. 1 Value Lower than 5a – (**Size** * 100)

Size	Adjust Factor
66.00	1.0600
68.00	1.0500



Example:


$$(66 * 100)$$

Low Units = **6,600**

8. Table Maintenance > Building Tables > Size Adjustments - Find High Price

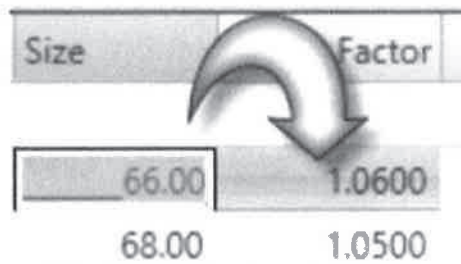
- a. 6a corresponding factor – (**Adjustment Factor**)

Size	Adjust Factor
66.00	1.0600
68.00	1.0500



9. Table Maintenance > Building Tables > Size Adjustments - Find Low Price

- a. 7a corresponding factor – (**Adjustment Factor**)



10. Calculate High Units minus Low Units

a. $(6a - 7a)$

Example:

$(6800 - 6600)$

High Units Minus Low Units = **200**

11. Calculate High Price minus Low Price

a. $(8a - 9a)$

Example:

$(1.05 - 1.06)$

High Price Minus Low Price = **-0.01**

12. Calculate Price divided by Units

a. $(11a / 10a)$

Example:

$(-0.01) / (200)$

Price Divided by Units = **-0.0000500000000000**

13. Calculate Size Percentage – Low Units

a. $(4a - 7a)$

Example:

$(6707.317073 - 6600)$

Size Percentage = **107.3170732**

14. Calculate Size Adjustment

a. $[(12a * 13a) + 9a]$

Example:

$[(-0.0000500000000000 * 107.3170732) + 1.06]$

Size Adjustment = **1.05463**

Example Worksheet

Calculate Size Adjustment		
Step	Variables	
3a	Style	35
3b	Effective area	2750
3c	Size Adjustment Code	B02E
3d	Std Size	4100
3e	Size Adj %	100
4a	Size Percentage	6707.317073
5a	Size Percentage Lookup	67.07317073
Look Up Price and Units Based on Size %		
6a	High Units	6800
7a	Low Units	6600
8a	High Price	1.05
9a	Low Price	1.06
Calculate Size Adjustment		
11a	High Price Minus Low Price	-0.01
10a	High Units Minus Low Units	200
12a	Price Divided By Units	-0.0000500000000000
13a	Size Percentage Minus Low Units	107.3170732
14a	Size Adjustment	1.05463



Understanding the OBXF Size Curve Calculation

This document will explain the Table Maintenance, Building Tables, Size Curve Calculation for Outbuildings and Extra Features. This document, in conjunction with the associated spreadsheet, demonstrates the size curve calculation. A screen shot of the worksheet is also available at the end of this document.

1. To determine the size adjustment the user must first gather the pertinent variables.

- a. Parcel > Outbuildings > **Code**

Primary Outbuilding Information

Code

Sub Type

- b. Parcel > Outbuildings > **Subtype** (If Applicable)

Primary Outbuilding Information

Code

Sub Type

- c. Parcel > Outbuildings > **Units**

Units

Measure 1

Measure 2

- d. Table Maintenance > Building Tables > OBXF Codes – Find the indicated Outbuilding Code (1a) and SubType (1b) from above, and determine the **Size Adjustment Code**

Table Maintenance

Building Tables

- Cost Use Codes
- Cost Group Rates
- Building Model Types
- Style Codes
- Size Adjustment Table
- Subareas
- OBXF Codes
- OBXF Grade/Condition
- EYB Depreciation
- Depreciation Tables

Outbuilding and Extra Feature Codes

Type

Code	Description	Sub	Desc	Unit Price	Fixed Price	Meas. 1 Price	Meas. 2 Price	Unit Type	Size Adj	Std Size
AB1	Bank Barn			12.22		0.00	0.00	UT	AB1	3,000

- e. Table Maintenance > Building Tables > Style Codes – Find the indicated Outbuilding Code (3a) and SubType (3b) from above, and determine the **Standard Size**

Outbuilding and Extra Feature Codes

Type: Both

Code	Description	Sub	Desc	Unit Price	Fixed Price	Meas. 1 Price	Meas. 2 Price	Unit Type	Size Adj	Std Size
AB1	Bank Barn			12.22		0.00	0.00	UT	AB1	3080

2. With known variables, the first calculation determines the **Size Percentage**

- a. $(10,000 / \text{Standard Size}) * \text{Units}$

Example:

$$(10,000 / 3080) * 2,400$$

$$\text{Size Percentage} = 7792.207792$$

3. For future calculations, divide the **Size Percentage** (SP) by 100

- a. $(\text{Size Percentage} / 100)$

Example:

$$(7792.207792 / 100)$$

$$\text{Size Percentage Lookup} = 77.92207792$$

4. Table Maintenance > Building Tables > Size Adjustments - Find High Units

Table Maintenance

Building Tables

Size Adjustments:

AB1

Code	Description
AB1	AB1

- a. 1 Value Higher than 3a – $(\text{Size} * 100)$

70.00	1.0600
80.00	1.0400

Example:

$$(80 * 100)$$

$$\text{High Units} = 8,000$$

5. Table Maintenance > Building Tables > Size Adjustments - Find Low Units

- a. 1 Value Lower than 3a – $(\text{Size} * 100)$

70.00	1.0600
80.00	1.0400

Example:

$$(70 * 100)$$

Low Units = **7,000**

6. Table Maintenance > Building Tables > Size Adjustments - Find High Price

a. 6a corresponding factor – (Adjustment Factor)

70.00	1.0600
80.00	1.0400

7. Table Maintenance > Building Tables > Size Adjustments - Find Low Price

a. 7a corresponding factor – (Adjustment Factor)

70.00	1.0600
80.00	1.0400

8. Calculate High Units minus Low Units

a. (4a – 5a)

Example:

$$(8000 - 7000)$$

High Units Minus Low Units = **1000**

9. Calculate High Price minus Low Price

a. (6a – 7a)

Example:

$$(1.04 - 1.06)$$

High Price Minus Low Price = **-0.02**

10. Calculate Price divided by Units

a. (9a / 8a)

Example:

$$(-0.02) / (1000)$$

Price Divided by Units = **-0.0000200000000000**

11. Calculate Size Percentage – Low Units

a. (2a – 5a)

Example:

$$(7792.207792 - 7000)$$

Size Percentage = **792.2077922**

12. Calculate Size Adjustment

a. $[(10a * 11a) + 7a]$

Example:

$[(-0.0000200000000000 * 792.2077922) + 1.06]$

Size Adjustment = 1.04416

Example Worksheet

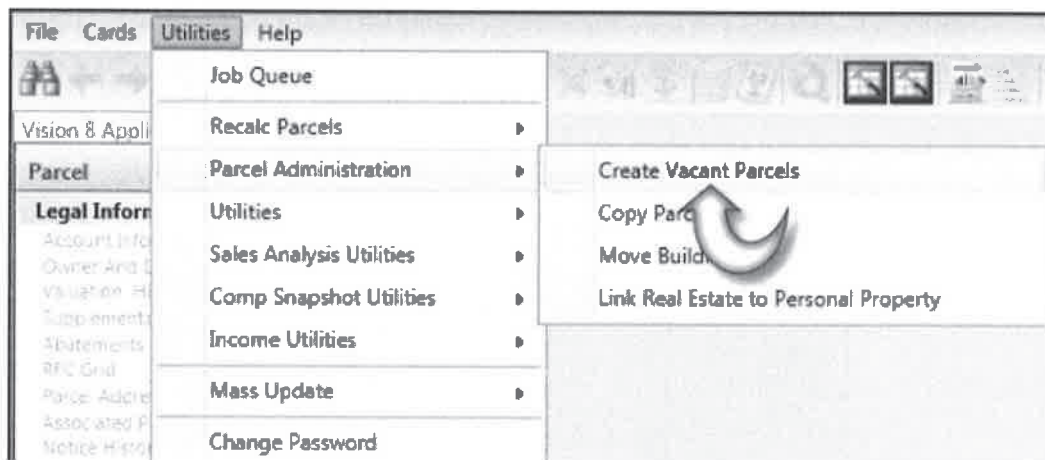
Calculate OBXF Size Adjustment		
Step	Variables	
1a	OBXF Code	AB1
1b	OBXF Subtype - If Applicable	
1c	Effective Area	2400
1d	Size Adjustment Code	AB1
1e	Standard Size	3080
2a	Size Percentage	7792.207792
3a	Size Percentage Lookup	77.92207792
Look Up Price and Units Based on Size %		
4a	High Units	8000
5a	Low Units	7000
6a	High Price	1.04
7a	Low Price	1.06
Calculate Size Adjustment		
8a	High Units Minus Low Units	1000
9a	High Price Minus Low Price	-0.02
10a	Price Divided by Units	-0.0000200000000000
11a	Size Percentage Minus Low Units	792.2077922
12a	Size Adjustment	1.04416



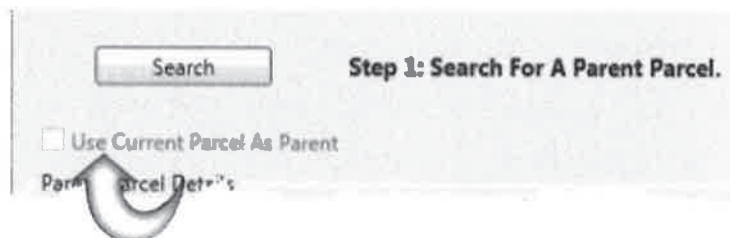
How to Create a Vacant Parcel

The purpose of this document is to walk a user through the process for creating a Vacant Parcel. An example of when this may be use is for the completion of subdivisions.

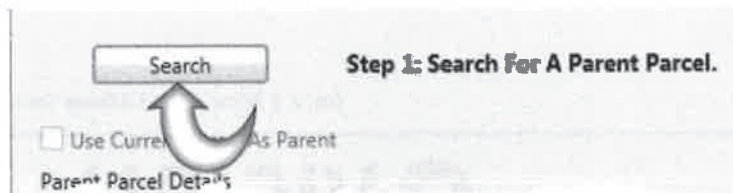
1. Click on **Utilities, Parcel Administration, Create Vacant Parcels**.



2. Select a parent parcel – the parcel to be used to create the new parcel(s).
 - A. If the parent parcel is currently selected (displayed on the screen), click on the **Use Current Parcel as Parent** check box.



- B. If the parent parcel is not currently selected (displayed on the screen), click on **Search**.



3. Parcel Data from the parent parcel will then populate on the **Parent Parcel Details** screen.

Step 1: Search For A Parent Parcel.

☒ Use Current Parcel As Parent

Parent Parcel Details

MBLU: 100 20 30 15

Property Location: 15 N MAIN ST W

Current Owner:

Parcel ID: 15

Account Number: 100203015

Land Acres: 42

ID: 000015

Alt ID: 000100203015

4. Enter the amount in the **Land Units to Allocate** and click **Next**.

Step 1: Search For A Parent Parcel.

☒ Use Current Parcel As Parent

Parent Parcel Details

MBLU: 100 20 30 15

Property Location: 15 N MAIN ST W

Current Owner:

Parcel ID: 15

Account Number: 100203015

Land Acres: 42

ID: 000015

Alt ID: 000100203015

Step 2: Specify The Number Of Units To Allocate.

Units To Allocate: 5

5. From the Specify the Starting Criteria screen:

1. Enter the **Number of Parcels** to Create.
2. Click on the **Vacant Use Code** drop down arrow to choose a vacant Land Use Code.
3. Enter **Default Lot Size** amount.
4. Click on the **Default Parcel Status** drop down arrow to choose a Parcel Status.
5. Click on the **Default Work in Progress On** check box.

Step II: Specify The Starting Criteria.

Starting Criteria

MBLU 100 20 30 15

Property Location 15 N MAIN ST W

Account Number 100203015

Pin 000015

Alternate Id 000100203015

Res Nbrhd 0001: Default 1

Census Nbrhd 0001: Default 1

Condo Nbrhd 0001: Default 1

Of Parcels To Create 3

Vacant Use Code 100V: SFD - Ur

Default Lot Size d

Default Status Active

☒ Default Work In Progress On

6. Click on the individual check boxes of each of the fields to be applied to the newly created parcel(s) on the Specify the Field Increment Values screen and click **Next**.

Step III: Specify The Field Increment Values.

Increment Fields

MBLU

☐ Map ☐ Block ☐ Lot ☒ Unit Increment By

☐ Street Number Increment By

☐ Apartment Number Increment By

☒ Account Number Increment By 1

☒ Pin Increment By 1

☒ Alternate Id Increment By 1

Back Cancel Next

7. Click on **Generate Parcel List**.

Step 5: Generate The Parcel List.

Generate Parcel List

Potential Parcels

Status	Map	Block	Lot
--------	-----	-------	-----

8. Once the new parcel(s) are generated, the parcel data fields can be edited on the **Generate the Parcel List** grid screen.

9. Once the edits are complete, click **Next**.

Potential Parcels

Status	Map	Block	Lot	Unit
Active	▼ 100	20	30	15
Active	▼ 100	20	30	15
Active	▼ 100	20	30	15

Previous Cancel Next

10. Select the data to be copied from the parent parcel to the vacant parcel(s) using the check box(es) from the Specify the Data That Will be Copied screen.

1. Click on the **Copy All** check box

OR

1. Click on the **individual data table** check box.

Then:

2. Select a **Sales and Assessment History** check option.

3. Click on **Track Changes** check box to generate an Assessment Change Maintenance table entry.

11. Click **Next**.

Step 6: Specify The Data That Will Be Copied.

☒ Copy All **1**

☒ ADDRESS
☒ EXEMPTS
☒ OTHERASS
☒ NOTICEHST
☒ VISITHST
☒ BLDGPERM
☒ REIMAGES
☒ NOTES
☒ DOCUMENTS
☒ OVRADJ

Sales And Assessment History

☐ Do Not Copy Sales Information
☒ Copy Current Sales Information **2**
☐ Copy All

☐ Copy Assessment History

Change Tracking

☒ Track Changes
 Reason For Change Code: 01: Reassessment **3**
 Acceptance Code: 2: Land Assessment
 Fiscal Year: 2014

4

12. Check the Review the Parcel List and Data That Will Be Copied screen to ensure the parcels selected will be created as desired.

Step 7: Review The Parcel List And Data That Will Be Copied

Potential Parcels	Status	Map	Block	Lot	Unit	Account #	Street #	S
Active	*	100	20	30	15	100203016	15	N
Active	*	100	20	30	15	100203017	15	N
Active	*	100	20	30	15	100203018	15	N

ADDRESS

EXEMPTS

OTHERASS

NOTICEHST

VISITHST

BLOGPERM

REIMAGES

NOTES

OVRADJ

Sales And Assessment History

☐ Do Not Copy Sales Information

☒ Copy Current Sales Information

☐ Copy All

☐ Copy Assessment History

Change Tracking

☒ Track Changes

Reason For Change Code 01: Reassessment

Acceptance Code 2: Land Assessment

Fiscal Year 2014

13. Click **Execute**.

Previous Cancel Execute

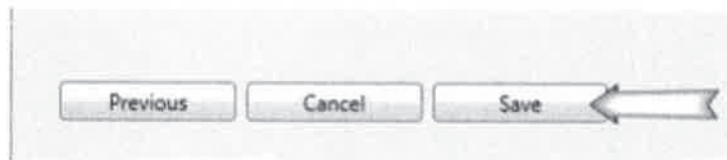
14. Check the **Status** of the **Monitor the Status of the Vacant Parcels** screen.

Step 8: Monitor The Status Of The New Vacant Parcels.

Vacant Parcel Creation Status	Property Location	Account #	PID	Status
104/ 24/ 34/ 16/	12 MAIN ST	100203013	47	Success

Creation Errors

15. Click **Save**.



Note: If the **Status** shows an error, and are messages in the **Creation Errors** section, please contact Customer Support at 800-628-1013 x6000.



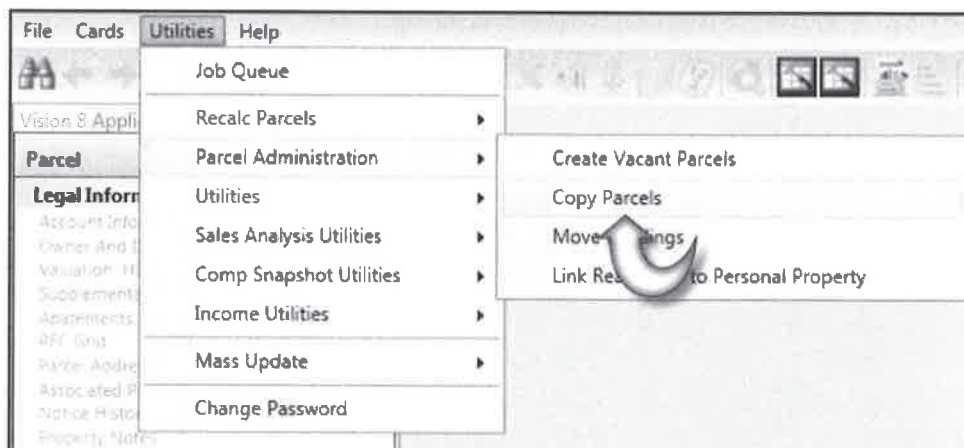
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How to Copy a Parcel

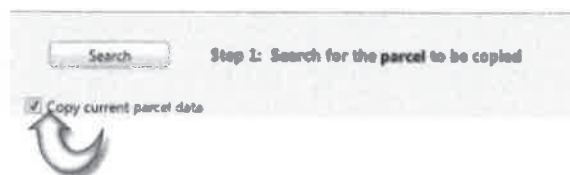
The purpose of this document is to walk a user through the process for copying a parcel information from a source parcel to a target parcel. Make sure there is a valid database backup file created prior to using this tool, as once the process is executed, changes cannot be reversed. Having a valid backup file ensures that any changes can be reverted back to an older day's status, if necessary. Contact Customer Support if you need assistance with ensuring you have a valid database backup.

1. Click on **Utilities, Parcel Administration, Copy Parcels**.

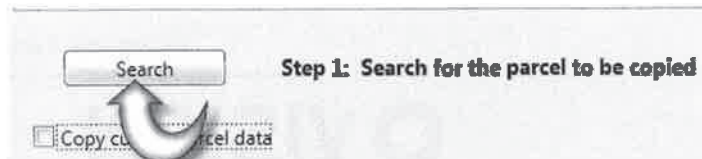


2. Select a parent parcel – the parcel to be used to create the new parcel(s).

-  If the parent parcel is currently selected (displayed on the screen), click on the **Copy Current Parcel Data** check box.



-  If the parent parcel is not currently selected (displayed on the screen), click on **Search**.



- Parcel Data from the parent parcel will then populate on the **Parent Parcel Details** screen.

Parent Parcel Details

1001 4 3

Property Location: 149 SEA AVENUE

Current Owner: CHASE MARTHA C

Parcel ID: 9

Account Number: 00001101

Land Acres: 1.641

Pin:

Alt Parcel ID:

- Click on the **Copy Current Parcel Data** check box.

- Click **Next**.

Search

Step 1: Search For The Parcel To Be Copied

☒ Copy Current Parcel Data

Current Parcel Details

MBLM 100 20 30 12

Property Location: 12 N MAIN ST W

Current Owner:

Parcel ID: 12

Account Number: 100203012

Land Acres: 21


ID: 000012

Alt ID: 000100203012

Cancel Next

- Click on **Search Button** to find the parcel to which this data will be copied.



 **Note:** Only vacant parcels can be selected

Search Button **Step 2: Search For Target Parcels**

☒ **Select All** 

Target Parcel	Pid	Location	MBLU	Owner Full Name	Co-Owner Full Name	State
<input type="checkbox"/>	32	32 N MAIN ST ST W UNIT	100 / / 20 / / 30 / / 32 /	MICHAEL MILLER	MARY MILLER	410V
<input type="checkbox"/>	33	33 N MAIN ST W	100 / / 20 / / 30 / / 33 /	MICHAEL MILLER	MARY MILLER	410V
<input type="checkbox"/>	34	34 N MAIN ST W	100 / / 20 / / 30 / / 34 /	MICHAEL MILLER	MARY MILLER	420V
<input type="checkbox"/>	36	36 N MAIN ST W	100 / / 20 / / 30 / / 36 /	MICHAEL MILLER	MARY MILLER	500V
<input type="checkbox"/>	48	12 MAIN ST	104 / / 24 / / 34 / / 16 /	MICHAEL MILLER	MARY MILLER	100V

7. Select the parcels to be included in the copy process:

- Click on the **Select All** check box **OR**
- Click on the **individual parcel** check to box select the parcel.

Search Button **Step 2: Search For Target Parcels**

☒ **Select All** 

Target Parcel	Pid	Location	MBLU	Owner Full Name	Co-Owner Full Name	State
<input type="checkbox"/>	32	32 N MAIN ST ST W UNIT	100 / / 20 / / 30 / / 32 /	MICHAEL MILLER	MARY MILLER	410V
<input type="checkbox"/>	33	33 N MAIN ST W	100 / / 20 / / 30 / / 33 /	MICHAEL MILLER	MARY MILLER	410V
<input type="checkbox"/>	34	34 N MAIN ST W	100 / / 20 / / 30 / / 34 /	MICHAEL MILLER	MARY MILLER	420V
<input type="checkbox"/>	36	36 N MAIN ST W	100 / / 20 / / 30 / / 36 /	MICHAEL MILLER	MARY MILLER	500V
<input checked="" type="checkbox"/>	48	12 MAIN ST	104 / / 24 / / 34 / / 16 /	MICHAEL MILLER	MARY MILLER	100V



8. Click **Next**

Previous **Cancel** **Next** 

9. Select the data to be copied from the parent parcel to the vacant parcel(s) using the check box(es) from the **Specify the Data That Will Be Copied** screen.

- Click the **Copy All** check box **OR**
- Click the **individual data table** check boxes.

☒ Copy All

- ☒ ABATEMENT
- ☒ ADDRESS
- ☒ AHDATE
- ☒ ALT_APP_HIST
- ☒ ApplicantInformation
- ☒ ASSHIST
- ☒ BLDG
- ☒ BLDGPERM
- ☒ CO_DETAIL
- ☒ CONSTR
- ☒ CONSTRCDM
- ☒ CONSTRCDU
- ☒ CONSTRCOM
- ☒ CONSTRDEP
- ☒ CONSTRRES
- ☒ CSSTORE
- ☒ CtrActualView
- ☒ DELMAST
- ☒ EXEMPTS
- ☒ FIRES

10. Click **Next**.

Previous Cancel Next

11. Check the Review the Parent, Targets, and Data to Be Copied screen, to ensure the information is correct.

Step 4: Review The Parent, Targets, And Data To Be Copied

Copy Date

- ABATEMENT
- ADDRESS
- AHDATE
- ALT_APP_HIST
- ApplicantInformation
- ASSHIST
- BLDG
- BLDGPERM
- CO_DETAIL
- CONSTR
- CONSTRCDM
- CONSTRCDU

Current Parcel Details

MBLID: 100 | 20 | 30 | 12

Property Location: 12 N MAIN ST, OH

Current Owner:

Parcel ID: 12

Account Number: 100000012

Land Area: 15

ID: 1000012

Alt ID: 1000000012

Parent Parcel ID:

12. Click **Execute**.

13. Check the status on the **Monitor the Status of the New Vacant Parcels** screen

14. A successful process will result in the status identified as **Copied**.



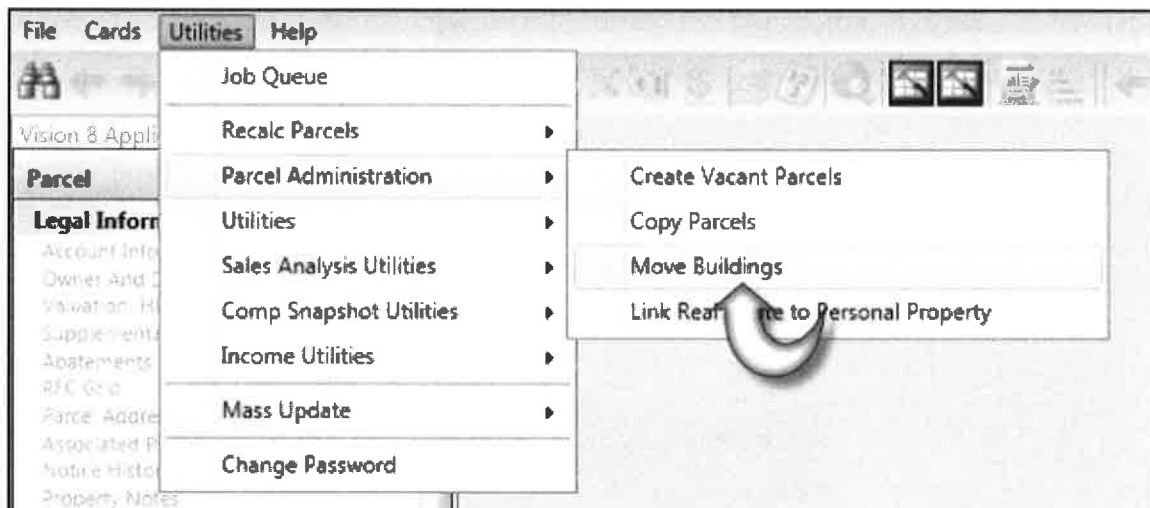
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Utilities – How to Move a Building

The purpose of this document is to walk a user through the process for moving a building from one parcel to another.

1. Click on **Utilities, Parcel Administration, Move Building.**




2. Select the parcel that the building is being removed from.



If the parent parcel is currently selected (displayed on the screen), click on the **Copy Current Parcel Data** check box. The parcel data will appear in the Parent Parcel Details section.

Step 1: Select Parent Parcel

☒ Current As Parent


 Parent Parcel Details

MBLU

Property Location

Current Owner

Parcel ID

-  If the parent parcel is not currently selected (displayed on the screen), click **Search**. The Search box will appear. Once the parcel is searched, the check box will activate and the parcel details will automatically populate

Step 1: Select Parent Parcel

☐ Current As Parent

Parent Parcel Details

MBLU



3. Parcel data from the parent parcel will then populate on the Parent Parcel Details screen.

4. Click **Next**.

Step 1: Select Parent Parcel

☒ Current As Parent

Parent Parcel Details

MBLU

Property Location

Current Owner

Parcel ID

Account Number

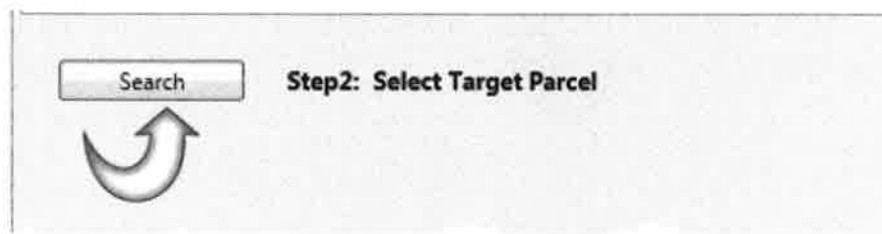
Land Acres

ID

Alt ID

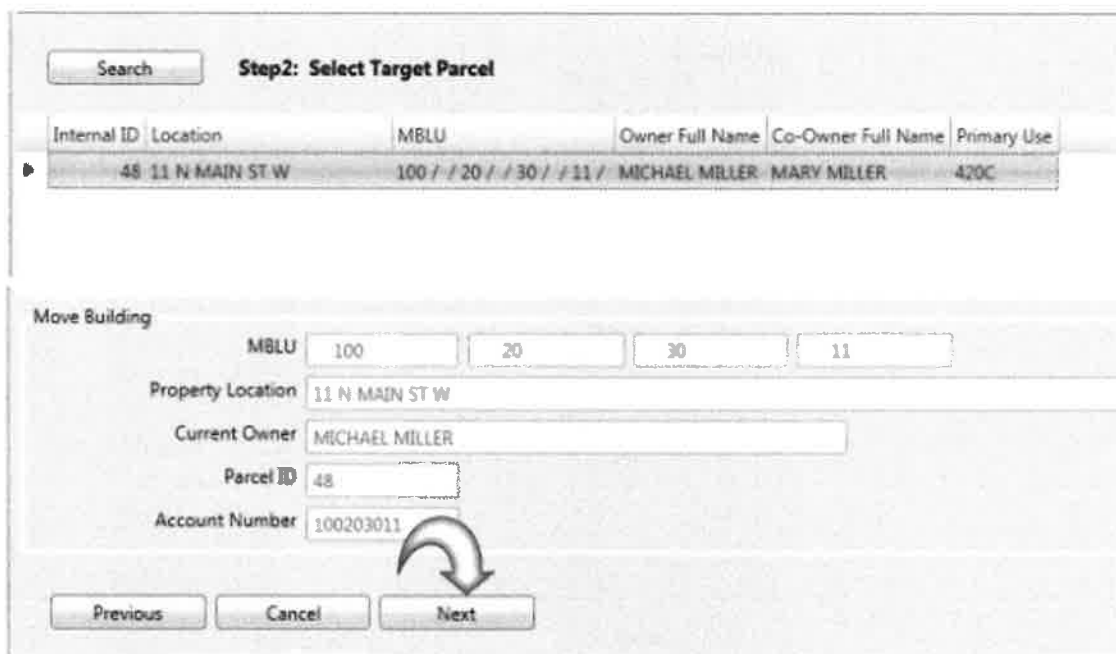


5. Click on **Search** to invoke the Search for Targeted Parcel.



Search **Step2: Select Target Parcel**

6. Highlight the parcel with the building to be moved and click **Next**



Search **Step2: Select Target Parcel**

Internal ID	Location	MBLU	Owner Full Name	Co-Owner Full Name	Primary Use
48	11 N MAIN ST W	100 / / 20 / / 30 / / 11 /	MICHAEL MILLER	MARY MILLER	420C

Move Building

MBLU: 100 20 30 11

Property Location: 11 N MAIN ST W

Current Owner: MICHAEL MILLER

Parcel ID: 48

Account Number: 100203011


Previous **Cancel** **Next**

7. At the top of the next page, select which building is the one to be copied by placing a check in the **Is Target** box.

Step 2: Select Buildings To Move

☒ Select All

Is Target				
<input checked="" type="checkbox"/>	1	0.00	0.00	0.00



8. The Building Details will show at the bottom of the page.

9. Choose the **Vacant Use Code**

Building Details

Building Number:

Bldg Name:

Bldg Frontage:

Bldg Depth:

Bldg Perimeter:

Notes1:

Section:

Notes3:

Block:

Lot:

Notes6:


Notes7:

Notes8:

Notes9:

Notes10:

Notes11:

Vacant Use Code: 

100V: SFD - Urban Vacant
 200V: SFD - Suburban - Farm
 200V: SFD - Suburban - Vac
 500V: Agricultural 20 - 99 AC - Farm
 500V: Agricultural 20 - 99 AC
 600V: Agricultural over 99 - Farm
 600V: Agricultural over 99
 700V: Exempt - Vac

10. Click **Next**.

Notes11

Vacant Use Code: 100V: SFD - Urban Vaca ▾

Previous Cancel Next ←

11. Verify the data on the Review Selection screen.

12. If you are satisfied with the information, click **Execute**.

Step 4: Review Selections ←

Parent Parcel Details

MBLU 100 20 30 2

Property Location 2 N MAIN ST W

Current Owner MICHAEL MILLER

Parcel ID 2

Account Number 10020302

Move Building

MBLU 100 20 30 30

Property Location 30 N MAIN ST W


Current Owner MICHAEL MILLER

Parcel ID 30

Account Number 100203030

Building Details

1 0.00 0.00 0.00

Previous Cancel  Execute

13. Check the **Move Status** on the Review the Move Status screen.

14. If the building is confirmed to be moved, exit the application by clicking **Close**.


Step 8: Review the move status

Move Status				Move Status
1	0.00	0.00	0.00	Copied

1

2

Close

 **Note:** If at any time the Move Status does not show that the building was copied, please contact Customer Support at 800-628-1013 x6000.

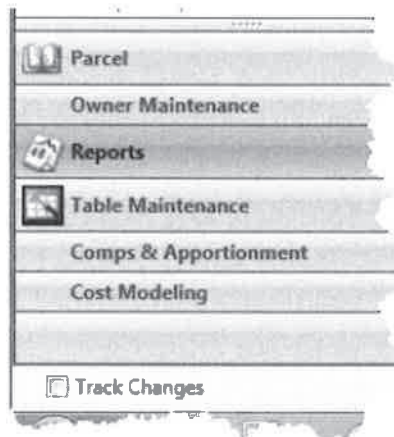
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Report Wizard Overview

The purpose of this document is to give the user an overview of the Report Wizard. The Report Wizard allows the user to create their own “customized” reports by selecting various TABLES, FIELDS, and SELECTION CRITERIA to adjust the report to suit the requirements.

1. Navigate to the left-hand menu tree, and click on **Reports**



2. The **Report Wizard** screen will appear.



Select Table and Columns Section

1. **Select a Sample Row of Data:** Once a report has been created, this section allows user to review a particular line of information
2. **Column View Options:**

- a. **Show Parcel Data** - Shows all parcel-related tables
- b. **Show All Table Data** - Shows ALL available data tables when a table is selected
- c. **Show Friendly Names** - Shows the more user-friendly field names within a selected column
- d. **Show Active Parcel** – Shows only parcels with an Active parcel status

3. Mail Merge:

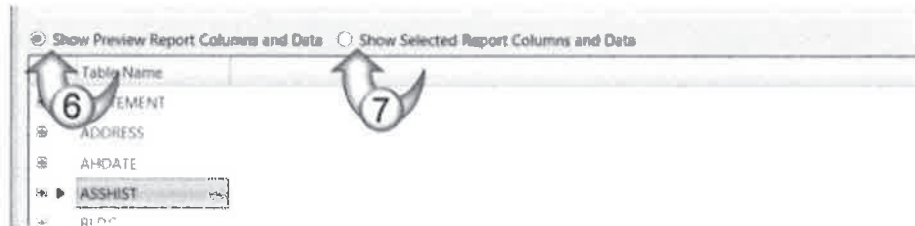
- a. **Mail Merge check box** - Indicates a mail merge is being created with the **Report Wizard**
- b. **Save to Associated Doc** - Indicates the merged document will be attached to each parcel affected as an **Associated Document**.
- c. **Template** - Shows the path to the template being used for the merge resides.
- d. **Save** - Indicates where the final, merged document file will be saved, for review, printing, etc

4. Custom Report: A list of any/all reports created and saved by an individual user.

5. The buttons to the right of the **Custom Report** list are used to make changes to the reports contained within that list.

- a. **Edit** – Select a report from the list and click here to activate/make changes.
- b. **Delete** – Removes the report from the **Custom Report** list.
- c. **Import PIDs** – Select only parcel data that corresponds text file with a list of **PIDs** (i.e. pidlist.txt)
- d. **Export** – Once a report template is created (a .RDL file), it can be saved to a different location (i.e. a new report shared amongst multiple users in the office)
- e. **Import** – Bring into Vision a report template (.RDL) that was previously saved to a different location.

6. **Show Preview Report Columns and Data** – As a report is constructed, this button allows the user to see in the **Preview Report Output** screen, each field as it is added.
7. **Show Selected Report Columns and Data** – Once the report is created and tested, or when a **Custom Report** is opened, this button will show exactly what tables/fields are in use.



8. **Preview Report Output** – Allows the user to view the data as it is being added to the report. While the end result may have more or less information, this section gives a rough idea as to what the final product will show.
9. **Group By Levels** – Allow the user to organize and sub-set data in the report.
10. **Title** – Prior to being run, any report created and subsequently generated by the Wizard must have a title.



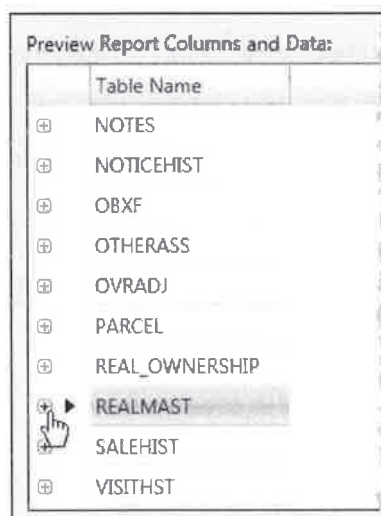
Creating a Custom Report in Report Wizard

From the **Select Tables and Columns** section, identify the tables and related columns necessary to create the custom report.

1. On the main Report Wizard page, a list of **TABLES** will be visible.



2. Click on the plus sign  icon that appears next to the table you would like to include in your report to view fields available within that table.



3. Then click on the boxes to select the individual fields to be displayed on your report.

Preview Report Columns and Data:

Table Name		
REALMAST		
Include	Column Name	Sample
<input checked="" type="checkbox"/>	REM_ACCT_NUM	13-3506-37
<input type="checkbox"/>	REM_ALT_PRCL_ID	
<input type="checkbox"/>	REM_ASSOC_PARCEL_ID	
<input type="checkbox"/>	REM_ASSOC_PCT	
<input type="checkbox"/>	REM_BLDG_NAME	
<input type="checkbox"/>	REM_CROSS_STREET_1	
<input type="checkbox"/>	REM_CROSS_STREET_2	
<input type="checkbox"/>	REM_FIELD_REVIEW	0

4. An option to select field alignment is also available by clicking the **Alignment** dropdown and selecting Left, Center or Right.

Preview Report Columns and Data:

Include	Column Name	Sample	Formula	Filter	Alignment	Format
<input type="checkbox"/>	REM_MBLU_UNIT					
<input type="checkbox"/>	REM_MBLU_UNIT_CUT					
<input type="checkbox"/>	REM_MNC	5415		*		
<input checked="" type="checkbox"/>	REM_OWN_NAME	MURPHY PASHA M			Left	
<input type="checkbox"/>	REM_PARCEL_STATUS	A				
<input checked="" type="checkbox"/>	REM_PID	1		*		
<input type="checkbox"/>	REM_PSN					
<input type="checkbox"/>	REM_PRCL_ID	1				
<input type="checkbox"/>	REM_PRCL_LOCN	75 SMITH AVE				

5. For any numeric fields, the user may choose a number format by clicking the **Format** dropdown. In the example below, we selected a currency format for the Total Appraised Value field.

Preview Report Columns and Data

Table Name	Include	Column Name	Sample	Formula	Filter	Alignment	Format
PRC_TTL_APPORTN	<input type="checkbox"/>		0		*	-	-
PRC_TTL_APPRAIS	<input type="checkbox"/>		275000		*	-	-
PRC_TTL_ASSESS	<input checked="" type="checkbox"/>		\$225,000		*	-	\$#,###
PRC_TTL_ASSESS_LND	<input type="checkbox"/>		92700		*	-	0
PRC_TTL_COMP_APPORTN	<input type="checkbox"/>		0		*	-	0.00
PRC_TTL_COST	<input type="checkbox"/>		225000		*	-	\$#,###
PRC_TTL_INCOME	<input type="checkbox"/>		0		*	-	\$#,###.00
PRC_TTL_LND_AREA Acres	<input type="checkbox"/>		0.45900000		*	-	\$#,###
PRC_TTL_REGRESSION	<input type="checkbox"/>		0		*	-	MM/dd/yyyy

Preview Report Output

Group By Levels: Levels

REM_PID	REM_ACCT_NUM	REM_PRCI_LOCN	PRC_TTL_ASSESS
9	02-1760-04	93 SMITH AVE	\$245,700
8	23-1016-00	91 SMITH AVE	\$140,800
7	15-0449-00	89 SMITH AVE	\$246,300
6	19-2616-00	5 FANNING LANE	\$175,700
5	10-0611-40	87 SMITH AVE	\$155,800
4	10-0077-52	85 SMITH AVE	\$167,400
3	08-1896-12	79 SMITH AVE	\$221,800
2	13-0114-00	77 SMITH AVE	\$208,600
10	19-1329-25	6 FANNING LANE	\$183,400
1	13-3506-37	75 SMITH AVE	\$225,000

6. As you select fields, a preview of your report will display on the bottom half of the screen under **Preview Report Output**.

Preview Report Output

Group By Levels: Levels

REM_PID	REM_ACCT_NUM	REM_PRCI_LOCN_NUM_CHAR	REM_PRCI_LOCN_STREET	REM_OWN_NAME
1	13-3506-37	75	SMITH AVE	MURPHY PASHA M
2	13-0114-00	77	SMITH AVE	MACKAY FRANCIS PATRICK ET UX
3	08-1896-12	79	SMITH AVE	HURST JENNIFER
4	10-0077-52	85	SMITH AVE	JACQUES REVOCABLE FAMILY TRUST
5	10-0611-40	87	SMITH AVE	JOYCE DENNIS E
6	19-2616-00	5	FANNING LANE	STANLEY PENELOPE J
7	15-0449-00	89	SMITH AVE	ORTOLEVA WILLIAM E ET UX
8	23-1016-00	91	SMITH AVE	WILSON DORIS A
9	02-1760-04	93	SMITH AVE	BORDEN ASHLEY E
10	19-1329-25	6	FANNING LANE	SIMBRON JERALD A ET UX

7. Once you have all of your fields selected, you may change the order of the columns by single left-clicking on the column header and dragging the column to the desired area.

I. Step 1: Single left-click on the column to be moved.

Preview Report Output

Group By Levels: Levels

REM_PID	REM_ACCT_NUM	REM_PRCI_LOCN_NUM_CHAR	REM_PRCI_LOCN_STREET	REM_OWN_NAME
9	02-1760-04	93	SMITH AVE	BORDEN ASHLEY E
8	23-1016-00	91	SMITH AVE	WILSON DORIS A
7	15-0449-00	89	SMITH AVE	ORTOLEVA WILLIAM E ET UX
6	19-2616-00	5	FANNING LANE	STANLEY PENELOPE J
5	10-0611-40	87	SMITH AVE	JOYCE DENNIS E
4	10-0077-52	85	SMITH AVE	JACQUES REVOCABLE FAMILY TRUST
3	08-1896-12	79	SMITH AVE	HURST JENNIFER
2	13-0114-00	77	SMITH AVE	MACKAY FRANCIS PATRICK ET UX
10	19-1329-25	6	FANNING LANE	SIMBRON JERALD A ET UX
1	13-3506-37	75	SMITH AVE	MURPHY PASHA M

II. Step 2: Drag the column to the desired position

Preview Report Output

Group By Levels: REMA_OWN_NAME

Title:

REM_PID	REM_ACCT_NUM	REM_PRCL_LOCN_NUM_CHAR	REM_PRCL_LOCN_STREET	REM_OWN_NAME
9	02-1760-04	93	SMITH AVE	BORDEN ASHLEY E
8	23-1016-00	91	SMITH AVE	WILSON DORIS A
7	15-0449-00	89	SMITH AVE	ORTOLEVA WILLIAM E. ET UX
6	19-2616-00	5	FANNING LANE	STANLEY PENELOPE J
5	10-0611-40	87	SMITH AVE	JOYCE DENNIS E
4	10-0077-52	85	SMITH AVE	JACQUES REVOCABLE FAMILY TRUST
3	08-1896-12	79	SMITH AVE	MURST JENNIFER
2	13-0114-00	77	SMITH AVE	MACKAY FRANCIS PATRICK ET UX
10	19-1329-25	6	FANNING LANE	SIMBRON JERALD A ET UX
1	13-3506-37	75	SMITH AVE	MURPHY PASHA M

III. Step 3: Release the mouse button. The column will now appear in a different area of the screen.

Preview Report Output

Group By Levels: REMA_OWN_NAME

Title:

REM_PID	REM_ACCT_NUM	REM_OWN_NAME	REM_PRCL_LOCN_NUM_CHAR	REM_PRCL_LOCN_STREET
9	02-1760-04	BORDEN ASHLEY E	93	SMITH AVE
8	23-1016-00	WILSON DORIS A	91	SMITH AVE
7	15-0449-00	ORTOLEVA WILLIAM E. ET UX	89	SMITH AVE
6	19-2616-00	STANLEY PENELOPE J	5	FANNING LANE
5	10-0611-40	JOYCE DENNIS E	87	SMITH AVE
4	10-0077-52	JACQUES REVOCABLE FAMILY TRUST	85	SMITH AVE
3	08-1896-12	HURST JENNIFER	79	SMITH AVE
2	13-0114-00	MACKAY FRANCIS PATRICK ET UX	77	SMITH AVE
10	19-1329-25	SIMBRON JERALD A ET UX	6	FANNING LANE
1	13-3506-37	MURPHY PASHA M	75	SMITH AVE

8. Once all of your fields are added and in the desired order on your report, add a **Title** to your report and click **Next** to view your completed report.

Preview Report Output

Group By Levels: REMA_OWN_NAME

APPRAZED VALUES

1

REM_PID	REM_ACCT_NUM	REM_PRCL_LOCN	PRC_TFL_ASSESS
9	02-1760-04	93 SMITH AVE	\$245,700
8	23-1016-00	91 SMITH AVE	\$140,800
7	15-0449-00	89 SMITH AVE	\$268,500
6	19-2616-00	5 FANNING LANE	\$175,700
5	10-0611-40	87 SMITH AVE	\$195,000
4	10-0077-52	85 SMITH AVE	\$167,800
3	08-1896-12	79 SMITH AVE	\$221,000
2	13-0114-00	77 SMITH AVE	\$208,600
10	19-1329-25	6 FANNING LANE	\$183,900
1	13-3506-37	75 SMITH AVE	\$225,000

2

Next > > Back < < Print > >

9. Your Report will appear on the screen.

Report Wizard

1 of 27 100% First Next

ASSESSED VALUES

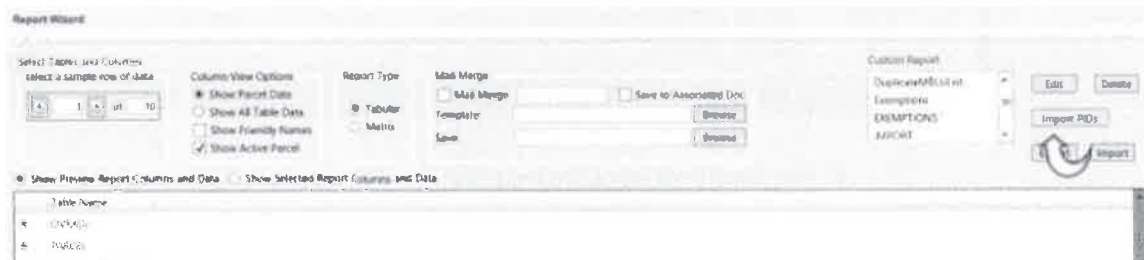
REM_PID	REM_ACCT_NUM	REM_PRCI_LOCN	PRC_TTL_ASSES
2	00000401	117 SEA AVENUE	\$22
3	00000501	113 SEA AVENUE	\$311,400
4	00000601	109 SEA AVENUE	\$0
5	00000701	105 SEA AVENUE	\$0
6	00000801	99 SEA AVENUE	\$2
7	00000901	93 SEA AVENUE	\$0
8	00001001	89 SEA AVENUE	\$334,300
9	00001101	143 SEA AVENUE	\$261,100
10	00001201	137 SEA AVENUE	-\$1
11	00001301	131 SEA AVENUE	\$317,900
12	00001401	125 SEA AVENUE	\$323,100
13	00001501	122 SEA AVENUE	\$261,800
14	00001601	71 MEARS AVENUE	\$194,200
15	00001701	79 MEARS AVENUE	\$176,000
16	00001801	85 MEARS AVENUE	\$178,000
17	00001901	118 SEA AVENUE	\$248,800
18	00002001	112 SEA AVENUE	\$262,800
19	00002101	108 SEA AVENUE	\$257,000

1. Create a custom report using a specific PID list is also possible, provided the list of PIDs is available as a .TXT file. This file would be imported first, then the report would be created as desired. Once complete, only the PID numbers originally imported would show on the resulting report.

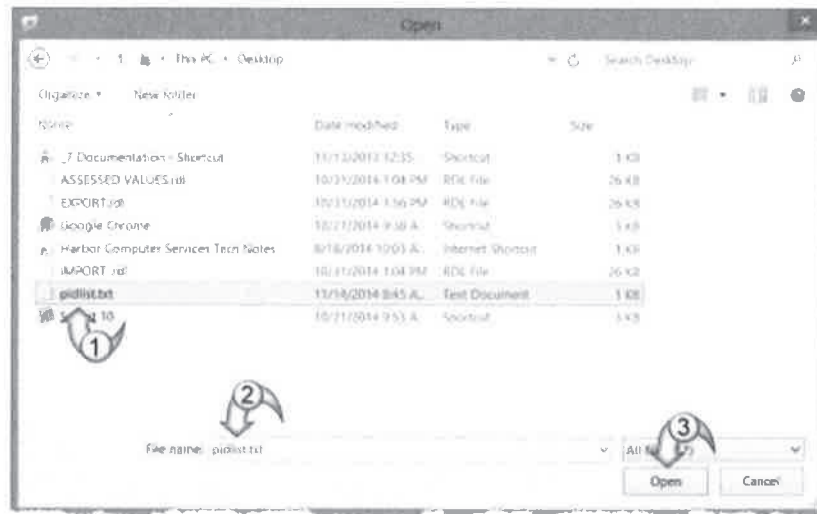
10. Create a TXT file of the PIDs to be imported to Vision



11. Go to the **Report Wizard** and click on **Import PIDs**



12. Navigate to the PID list file created, select the file and click **Open**



13. Create the report as desired. Review the **Preview Report Output** section of the screen to ensure the fields selected are appropriate and click **Next**.

Preview Report Output

Group By Levels: Title: Import PIDs Demonstration

REM_PID	OWN_NAME1	MAD_MAIL_ADDR1	MAD_MAIL_CITY	MAD_MAIL_STATE	MAD_MAIL_ZIP
1	MICHAEL MILLER	1 Main St	Anytown	MA	00000-0000
2	MICHAEL MILLER	2 Main St	Anytown	MA	00000-0000
3	MICHAEL MILLER	3 Main St	Anytown	MA	00000-0000
4	MICHAEL MILLER	4 Main St	Anytown	MA	00000-0000
5	MICHAEL MILLER	5 Main St	Anytown	MA	00000-0000
6	MICHAEL MILLER	6 Main St	Anytown	MA	00000-0000
7	MICHAEL MILLER	7 Main St	Anytown	MA	00000-0000
8	MICHAEL MILLER	8 Main St	Anytown	MA	00000-0000
9	MICHAEL MILLER	9 Main St	Anytown	MA	00000-0000
10	MICHAEL MILLER	10 Main St	Anytown	MA	00000-0000

Buttons: New, Back, Next, Save

14. The report will display **ONLY** the specific PIDs from the TXT file:

Report Wizard

1 of 1 100% Find Next

Import PIDs Demonstration

REM_PID	OWN_NAME1	MAD_MAIL_ADDR1	MAD_MAIL_CITY	MAD_MAIL_STATE	MAD_MAIL_ZIP
1	MICHAEL MILLER	1 Main St	Anytown	MA	00000-0000
12	MICHAEL MILLER	12 Main St	Anytown	MA	00000-0000
15	MICHAEL MILLER	15 Main St	Anytown	MA	00000-0000
25	MICHAEL MILLER	25 Main St	Anytown	MA	00000-0000
33	MICHAEL MILLER	33 Main St	Anytown	MA	00000-0000
34	MICHAEL MILLER	34 Main St	Anytown	MA	00000-0000

Count: 6