



A Division of Harris Computer Systems

TAX BILLING: CUSTOM BILLS

The following reference sheet details the process of creating and editing custom bill formats in the TRIO Tax Billing program. This process is the same one that was used to create all of the billing formats in the TRIO Windows Tax Billing program and allows for the creation of custom billing formats to fit any need.

In order to access the Edit Custom Bills screen, from Tax Billing, select **M. File Maintenance > 6. Edit Custom Bill**. The image below shows the Custom Bill screen. Each area of the screen serves a different purpose and will be explained in detail below.

The screenshot shows the 'Custom Bill' window with the following components:

- A. File Menu:** Points to the 'File' menu at the top left.
- B. Page Set Up Window:** Points to the 'Page Set Up' section on the left, containing fields for Name, Units, Page Height, Page Width, Top Margin, Bottom Margin, Left Margin, and Right Margin.
- C. Field Set Up Window:** Points to the 'Field Set Up' table in the center, which lists fields like Rectangle, Vertical Line, RE + PP Label, Year, Town Logo, and Return Address with their respective coordinates and dimensions.
- D. Bill Layout Window:** Points to the 'Bill Layout' section at the bottom, which includes a preview of the bill format with fields for Town Logo, Return Address, Billing Address, and Current Billing Information.

A. File Menu - The File Menu contains the options for saving, loading, and manipulating the Bill Format file.

1. **Add/Delete Field** – Allows for the adding or deleting of fields in the Field Set Up Window.
2. **Zoom In/Out** – Zooms the view on the Bill Layout Window in or out.
3. **Print Sample** – Generates a Print Preview of the Custom Bill Format.
4. **Import/Export Format** – Allows for the saving/loading of the Custom Format to an external file. This can be used to copy the format from one computer to another.
5. **Preferences** – Specifies how far to move a field in the Bill Layout Window when using the arrow keys on the keyboard to do so. Options are Full, Half, or Quarter Line/Character.
6. **Delete/Load/New Format** – Allows for the deleting or loading of existing formats, or the creation of a new format.
7. **Save/Save As/Save and Exit** – Will save the current bill format. Save As will allow for saving as a new file name and Save and Exit will close the Custom Bill Format window after saving.

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B. Page Set Up Window - The Page Set Up Window contains the various settings for the bill page itself – i.e. margins, form size, etc.

1. **Name** – The name that the custom bill will be referenced by when saving and loading.
2. **Units** – The units of measurement to be used when formatting the bill – options are inches or centimeters.
3. **Page Height and Width** – The width and height of the bill – the number here uses the Units setting from above.
4. **Top/Bottom/Left/Right Margins** – Sets the margin sizes – again uses the form’s Units setting.
5. **Style** – Sets the printer type – choices are laser/inkjet or dot matrix.
6. **Description** – Description to be used in referencing the bill when loading/saving.
7. **Background** – Allows for the loading of an image file to be set as the background for the bill. This is useful for showing a watermark or similar image on the bill.
8. **Default Font Size** – Sets the default font size of new fields added to the bill.

C. Field Set Up Window – The Field Set Up Window is where the actual fields for the bill get added and edited. There are dozens of options for the types of fields that can be added to the bill – a complete list is included at the end of this document.

1. **Field** – The number of the field – this is automatically assigned by the system.
2. **Name** - The name of the field – this is editable. Many fields will be labeled on the Bill Layout Window by what is in this field.
3. **Top/Left** – The position of the field on the bill – the numbers listed are measured from the top and left in the units specified in the Page Set Up Window.
4. **Height/Width** – The height and width of the field, listed in the specified units.
5. **Field Info** – This lists the type of the field. Clicking on this item for a field will bring up a “...” button, clicking on that will load the detailed settings that can be configured for the field. The following is an example of the settings that can be changed – depending on the type of field the options can be different. Explanations of the common fields are listed below.

Type	Building
Text	Label
Alignment	Right
Font Name	Tahoma
Font Size	10
Font Style	Regular

OK

- a. **Type** – This is the type of the field – this is what shows on the Field Set Up Window.
- b. **Text** – If a field type displays a preset text message, this is where that is entered.
- c. **Alignment** – The alignment of the text in the field.
- d. **Font Name** – Font to be used in the field.
- e. **Font Size** – Font size of the text in the field.
- f. **Font Style** – Setting of Bold, Italic, etc. for the text in the field.

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D. Bill Layout Window – The bill layout window is where the fields are actually shown and aligned. The fields can be moved around by clicking and dragging with the mouse or using Ctrl + the arrow keys on the keyboard. Multiple fields can be selected by holding down Ctrl and left clicking, or by clicking and dragging around the items to be included. The active field is highlighted in yellow; if other fields are selected, but not active, they will be shown in blue. Right clicking an item or group of selected items provides several options:

- 1. Align Lefts/Rights/Tops/Bottoms** - If multiple items are selected, this will line them all up so that their left/right/top/bottom edges are all even.
- 2. Bring to Front** – If multiple items are overlapping each other, the selected item will become the front most item.
- 3. Send to Back** – Again, if multiple items are overlapping, the selected item will be moved underneath all of the other items.
- 4. Copy/Paste** – Copies and/or Pastes the selected item(s).

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Tax Billing Custom Bill Fields

Category	Type	Description
Miscellaneous	Label	User defined text field
Miscellaneous	Image	User defined image
Miscellaneous	Rectangle	An unfilled rectangle
Miscellaneous	Rectangle (Filled)	A filled rectangle - Text will be in white
Miscellaneous	Horizontal Line	A horizontal line
Miscellaneous	Vertical Line	A vertical line
Miscellaneous	Bar Code	A bar code
Miscellaneous	Prompt Text	A text field that the user is prompted to supply a value for
Billing	Return Address	The return address information - Auto-condenses blank lines
Billing	Tax Rate	The tax rate expressed as per 1000
Billing	Tax Year	The tax commitment year
Billing	Due Date	The due date for the specified period
Billing	Interest Date	The interest date for the specified period
Billing	Distribution Label	The distribution description for the specified distribution
Billing	Distribution Percent	The distribution percentage for the specified distribution
Billing	Distribution Amount	The distribution amount for the specified distribution
Account Information	Billing Address	The billing address at the time of commitment
Account Information	Owner Name	The owner's name
Account Information	Location	The location of the property
Account Information	Account Number	This is a string - For ex: R102 or P62. For combined: R15 P21
Account Information	Second Owner	The second owner
Tax	Original Tax Due	The total original due for all periods
Tax	Tax Due	The total tax due after any payments
Tax	Paid to Date	The total paid to date for this bill
Tax	Original Tax Due (1-4)	The original due for the specified period
Tax	Tax Due (1-4)	The tax due after any payments for the specified period
Tax	Discount Amount	The original tax to be paid to get a discount
Tax	Discount Amount (due)	The tax left to pay to receive a discount
RE & PP	RE + PP Label	This label's text changes depending on the bill type
Real Estate	RE Label	This is a label that will be blank for non-real estate bills
Real Estate	Map/Lot	The property's map and lot
Real Estate	Book & Page	The book and page information
Real Estate	Reference 1	Reference 1
Real Estate	Reference 2	Reference 2
Real Estate	Acres	Total Acres
Real Estate	Land	Land Value
Real Estate	Building	Building Value
Real Estate	Exemption	Total Exemption
Real Estate	Taxable Value	Land + Building + Exemption
Real Estate	Homestead Exempt	Amount of homestead exemption
Real Estate	Other Exempt	Total exemption other than homestead
Personal Property	PP Label	This label will be blank for non-personal property bills
Personal Property	Total Value	Total value before exemption
Personal Property	Exemption	Total Exemption
Personal Property	Taxable Value	Total Value - Exemption
Personal Property	Category Description	Description of the specified category
Personal Property	Category Amount	Value for the specified category
Personal Property	Open 1 Description	Description of the Open 1 field
Personal Property	Open 1	The Open 1 value for this account
Personal Property	Open 2 Description	Description of the Open 2 field
Personal Property	Open 2	The Open 2 value for this account
Personal Property	Category Amount (range)	Value for the specified range of categories