



A Division of Harris Computer Systems

## REAL ESTATE: IMPORTING AND EXPORTING

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TRIO is set up so that Real Estate information can easily be imported from another vendor or exported if billing is done through another party. There are three main ways to accomplish this in TRIO:

- 1. Create Database Extract** – Makes an extract that can be viewed in another program. This allows a database to be created and opened up in Microsoft Excel, for example.
- 2. Create User Extract** – This creates an extract in the form of an ASCII file that can be given to another vendor for tax billing.
- 3. Transfer from Other Vendor** – This allows RE data to be imported from other vendors and then used in the TRIO system.

### Create Database Extract

This option is available for both users of the full Assessing package and those just using Real Estate for Billing. If using the full Assessing, go to **7. Import/Export > 1. Create Database Extract**. If using just Short Maintenance, select **4. Import/Export > 1. Create Database Extract**. This creates a user-defined COMMA and QUOTE DELIMITED database extract in ASCII format (.ASC) that can be opened with another program such as Microsoft Excel. In the top part of this screen, there are several options of what to export for information. In the lower part of the screen, there is a box that has more options that can be added to the extract. To the right of that display are two buttons, one for adding and one for removing. There is a field to the right of that to show what is currently added to the extract. After the items have been selected for the extract, select *File > Create Extract (F12)*. The system will then display a message stating Extract Completed and the following file format will display:

```
The Extract is a comma delimited file named TSDBASE.ASC.  
It is saved in t:\TRIOdata  
It is in the following order:
```

```
Account Number  
Card Number  
Owner's Name  
Location  
Map/Lot  
Reference 1  
Reference 2  
Address 1  
Address 2  
Address 3  
State  
Zipcode  
4 Digit Zip  
Telephone Number  
Acreage
```

## Real Estate: Importing and Exporting *CONTINUED*

### Create User Extract

This option is only available in the full Assessing package. To access it, select **7. Import/Export > 2. Create User Extract**. There are two questions that are asked here: **Does the TRIO Map/Lot field need to be converted to Gemini Map/Lot format** and **Does the TRIO Map/Lot field need to be converted to Gemini Account Number and entered into the Reference Field?** This creates a file which is used to transfer the completed assessment to a tax billing system other than the TRIO Billing System. The transfer file (created in an ASCII format) is located in the TRIODATA folder on the drive that is used as the server (U: for example). If an Extract is to be used in a database application, utilize **Create Database Extract** instead.

- **Does the TRIO Map/Lot field need to be converted to Gemini Map/Lot format?** If this is the case, select *Yes*. TRIO can have up to four fields to represent Map/Lot. They are 1111-2222-3333-4444 where 1 is the Map, 2 is the Sub Map, 3 is the Lot and 4 is the Sub Lot. To convert to Gemini they require a number that is 17 digits long. So if the Map/Lot number in TRIO is 001-002-A, the number that would be entered would be 111-333-4----- . This will give Gemini the 17 digit field that they require for Map/Lot which will look like 00010002000A0000. If *Use space as filler* is selected, spaces instead of zeroes will be used to fill out the end of the number. If the *Condense* box is also checked, that will make the Gemini number look like 001 002 A (to reflect what the number in TRIO looks like). After making the appropriate selections press **F12** to continue.
- **Does the TRIO Map/Lot field need to be converted to Gemini Account Number and entered into the Reference Field?** If this is the case, then select *Yes*. Gemini account numbers can only be 11 characters long, so all 17 characters of the Map/Lot cannot be converted to the account number. To work around this, use this option to select which characters to use for the account number. For example, if there is a TRIO Map/Lot number of 001-002-003-A then 123 567 890 2 would be selected. After making the appropriate selections press **F12** to continue.

### Transfer from Other Vendor

This option is only available when *not* using the full Assessing package. Go to **4. Import/Export > 2. Transfer from Other Vendor** to start the process. This allows for the importing of Real Estate data from other vendors, such as Vision, which may then be used in the TRIO system. From here. the available options are:

**Import Real Estate** - This will bring up a screen that is divided into 4 tabs. These are: Updated, New Accounts, Not Updated, and Bad Accounts. To load in the Real Estate Data select *File > Load Records*. This will bring up a window asking for the location of the file to import (Y2K.Dat for example). Select the file and press the Open button. Once the import is complete, information in the aforementioned tabs should be reviewed. If this information is correct, transfer the information into the database by going to *File > Update TRIO*.

**Import Personal Property** - This process is similar to *Import Real Estate*, except that it shows the Current Net in the upper left hand corner, whereas Real Estate shows Current Land, Building, Exemption and Net.

**Customize** - This screen allows for the setting up of the File Format, Map/Lot and Owner information for Real Estate. It also allows for the adjustment of the File Format for Personal Property, as well. For Multi owners, make sure to check the Use Multi-Owner File Format box and save.