

# Bulk Import Form

## Select New File

Click [Browse...] to choose the file you received from the mortgage company. If you have a .csv file, you can change the file type via the drop-down in file explorer.

## File Has Header Row

☒ File has header row

Checking this box will skip importing data from the first row in the file during the import process. This is to handle electronic files that have a "header" row.

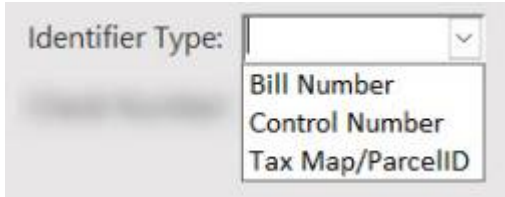
For example:

- CtlNumber,PaidBy,Bill,PaymentAmount

Would be examples of column names if a file had a "header row."

If in doubt, you can see how checking/unchecking the box will affect the options in the identifier combo boxes. If you don't see any header row, you can leave this box unchecked.

## Identifier Type

A screenshot of a web form showing a dropdown menu for 'Identifier Type'. The dropdown is open, displaying three options: 'Bill Number', 'Control Number', and 'Tax Map/ParcelID'. The text 'Identifier Type:' is visible to the left of the dropdown.

Based on what you see in the data file, choose one of the three identifier "types" to match on:

1. Bill Number
2. Control Number
3. Tax Map/Parcel ID

## Check Number

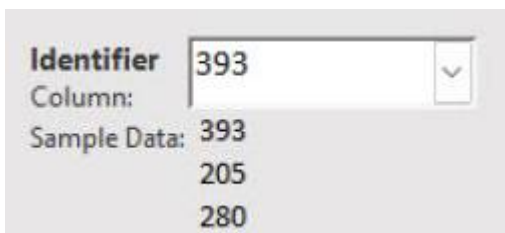
A screenshot of a web form showing a text input field for 'Check Number'. The text 'Check Number:' is visible to the left of the input field.

Enter the check number for the payments you are importing (separate with commas if multiple checks for one file)

## Selecting Identifying Information

The identifying information is necessary to import the payments. This helps link the electronic file information to the data in *TaxColl2k*.

## Identifier

A screenshot of a web form showing a dropdown menu for 'Identifier'. The dropdown is open, displaying three options: '393', '205', and '280'. The text 'Identifier' is visible to the left of the dropdown. Below the dropdown, the text 'Column:' and 'Sample Data:' are visible, followed by the values '393', '205', and '280'.

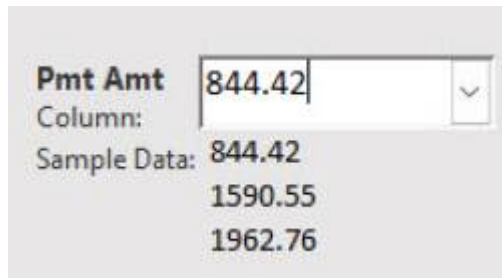
This should be either a:

- Bill Number
- Control Number
- Tax Map/Parcel ID

**Make sure** to identify the data correctly using the "Identifier Type" dropdown above the "Check

Number" field.


### Pmt Amt



The screenshot shows a dropdown menu for the 'Pmt Amt' field. The selected value is 844.42. Below the dropdown, the text 'Column:' is followed by a blank space. Underneath, the text 'Sample Data:' is followed by three lines of sample data: 844.42, 1590.55, and 1962.76.

Identify the column using the sample data that most likely is the Payment Amount of the bills.

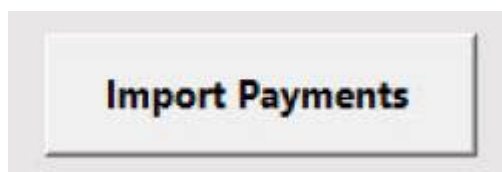
### Owner Name



The screenshot shows a dropdown menu for the 'Owner Name' field. The selected value is blank. Below the dropdown, the text 'Column:' is followed by a blank space. Underneath, the text 'Sample Data:' is followed by three lines of sample data: SHERYL, ROBERT F, and RAFAEL & P.

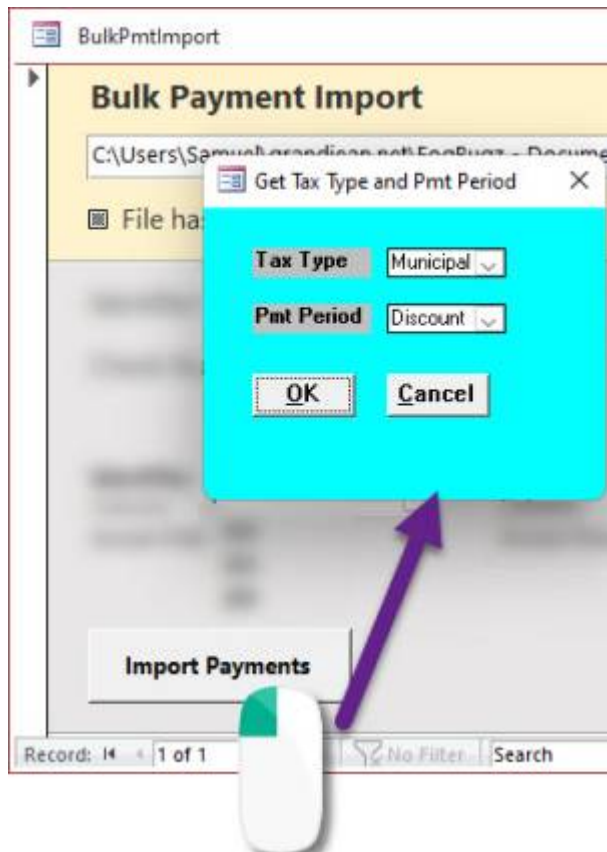
While not mandatory to select, try to identify using the sample data what is most likely the owner name column

### Import Payments



The screenshot shows a button labeled 'Import Payments'.

Clicking the [Import Payments] button will begin the import process. If the identifier and payment amount have been selected, you will be prompted to provide the Tax Type and Payment Period this electronic file was made for:



Once the payments have been imported, the "Pending Payments" report will open and display any payments categorized as one of the following:

- **Overpayment** (partial refund; bill will be PAID)
- **Underpayment** (full refund; bill will remain UNPAID)
- **Already paid** (full refund)
- **Parcel not found** (full refund)

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