Tax Information

Tax information is provided to the MLS by WIREdata. WIREdata collects the tax information, assessment data, legal descriptions, and sales information that are stored in the tax system.

Following are some of the reasons you'll find tax information helpful to you in your business:

- When you are going on a listing appointment, you can get the tax information either by searching for address or owner name.
- When you are calling owners whose listings have expired, you can search for the tax information before you call so you have some information about their property.
- You can get tax information before contacting a FSBO (for sale by owner) to see if they are interested in listing their property with you.
- You can use the ID Walk in tax information to find properties around the subject property either for a CMA or just to gain information about surrounding properties when going on a listing appointment.
- You can search by subdivision name or condominium name (if provided) in the legal description to find all of the properties in a particular subdivision or condominium complex.
- You can print labels for selected properties. You could either use Search by Address Range or All Fields, putting the subdivision name in the legal description field (again, if it is provided) to print labels. You could use this to print labels for properties in your market area, or perhaps labels for properties around your listing.

Some of the features of the tax system that will make your work quicker and easier are:

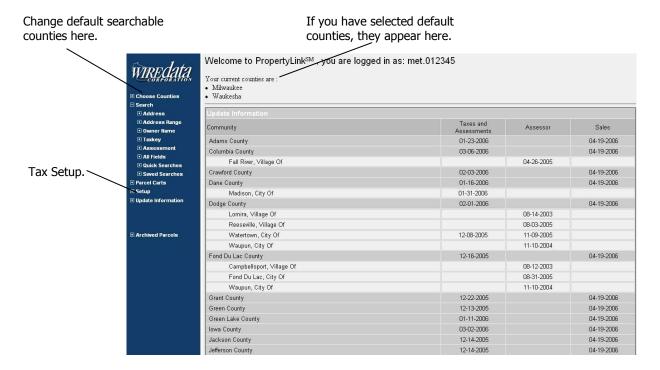
- If you normally search in only a few counties, you can set up default counties to eliminate a step when you're setting up searches.
- You can save searches for later use.
- You can create quick searches that have only the criteria you're interested in searching for.
- Parcel carts hold the matches from your searches you can then recall those matches later.

Getting into WIREdata

To get to the tax system, in the menu, click Tax Info, and then click Tax Information. This takes you to the PropertyLink SM Main Page. This page opens in a separate browser window so you can access FlexMLS at the same time.

The WIREdata menu

Along the left side of the WTREdata screen is the WTREdata menu.



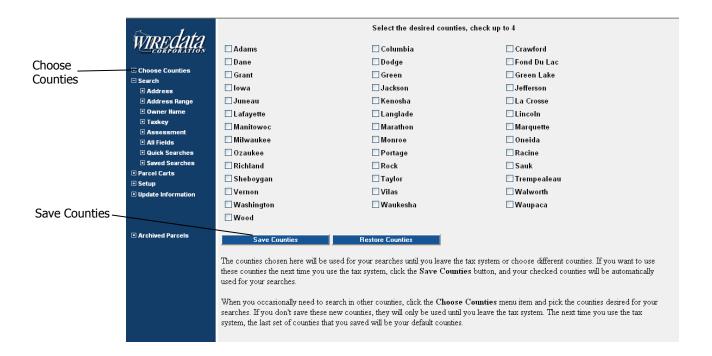
The WIREdata Search menu (blue pane, left-hand side), has the following choices:

| Choose Counties | SET YOUR DEFAULTS FOR COUNTIES | | |
|------------------------|--|--|--|
| Search | SEARCHING FUNCTIONS | | |
| Address | Search for property tax information by address (up to 10 at a time) | | |
| Address Range | Search for tax information using a range of addresses on a street (up to 10) | | |
| Owner Name | Search for property tax information by owner name (up to 10, last name first) | | |
| Taxkey | Search by tax key number (up to 10, searches using "begins with") | | |
| Assessment | Search for property tax information by assessment information | | |
| All Fields | Search by any field (parcel information, tax information, assessor data**, etc.) | | |
| Quick Searches | Search using a Quick Search you created under Setup | | |
| Saved Searches | Search using a Saved Search you created | | |
| Parcel Carts | VIEW, DELETE, OR EDIT PARCEL CARTS | | |
| Setup | SETUP PREFERENCES, VIEWS, AND SAVED SEARCHES | | |
| Preferences | Set your defaults for your preferences, change counties | | |
| Browse Views | Create, edit, delete or use your own Views | | |
| Quick Searches | Create, edit, delete or use Quick Searches | | |
| Saved Searches | Use or delete your Saved Searches | | |
| Update Information | INFORMATION CURRENT THROUGH THE DATE SHOWN | | |
| Archived Parcels | PARCELS THAT HAVE NO CURRENT ASSESSMENT OR TAXES | | |

** NOTE: When searching tax records, it is very important to know and remember that not ALL municipalities/counties provide assessor data (square footage, year built, number of units, etc.).

Choose Counties

Choose Counties is used to set default counties to automatically appear when you start your search. Thus, when you begin your tax search, those counties appear as your default rather than needing to choose them from "Select the desired counties" every time you get to this screen. To use this screen, in the WIREdata search menu on the left, click on Choose Counties.



Select the counties you wish to have as your default counties, and then click the **Save Counties** button. If you should ever wish to change or remove your defaults, come to this same screen and make changes as needed.

Address

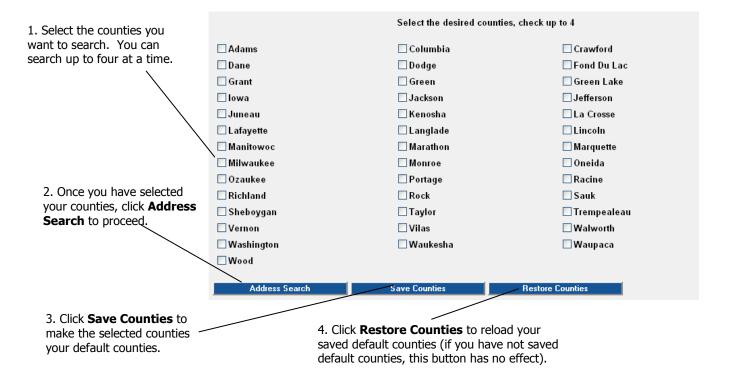
You can search the tax system directly for a property address. To do this:

- 1. In the WTREdata Search menu (the blue panel on the left of the screen), click Address.
- 2. Unless you have default counties saved in your preferences, the next screen allows you to select counties to search. (Otherwise, go to step 3.)

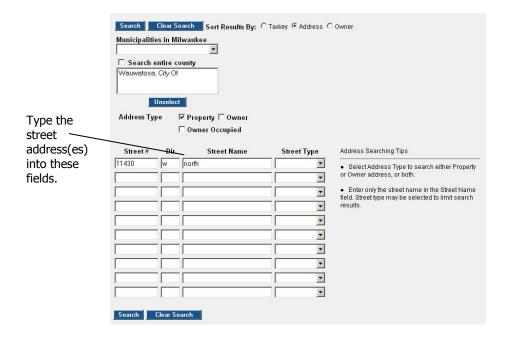
The tax system stores the counties you select as a default until you close the tax system window. Each search you perform will include information from those counties. (You can clear the defaults through the WTREdata Preferences menu under Setup or Choose Counties.)

You can also save the counties you select as defaults for every time you use the tax system – if you always want to search for tax information in a particular set of counties, saving default counties is a good idea. That way, you won't have to select counties each time you start searching the tax system. (If you need to search in a county that isn't included in your defaults, you can uncheck the counties through the WIREdata Preferences menu under Setup or Choose Counties.)

After you select the counties, click the **Address Search** button.

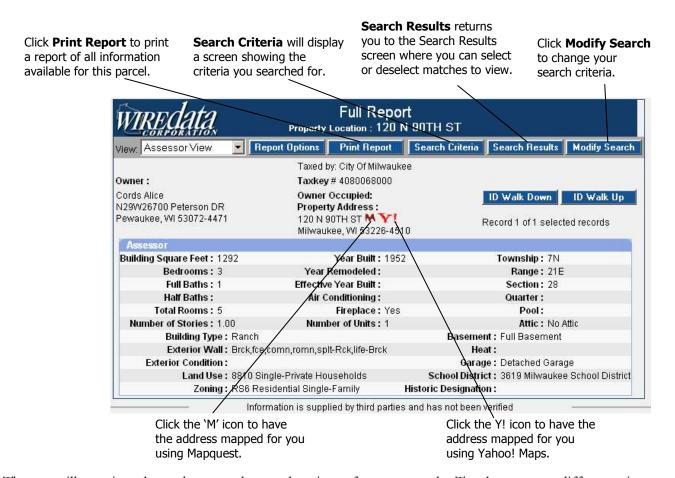


- 3. Choose the municipality or municipalities you want to search. If you want to search the entire county, check the **Search entire county** checkbox.
- 4. Enter the address(es) for which you want tax information, and click the **Search** button. The Street Name field is a "begins with" field. If you type "MAIN" in the Street Name field, the system finds Main, Main St, Main Street, or any street that begins with the letters "MAIN." You will want to use only the word they have in common because municipalities differ from one to another in the ways they enter addresses in their tax records.



The system locates the property and displays its tax record. The default view of the tax record is the Assessor View. You can configure the tax system to display whichever default view you want. See the Preferences section on p.123 for more information.

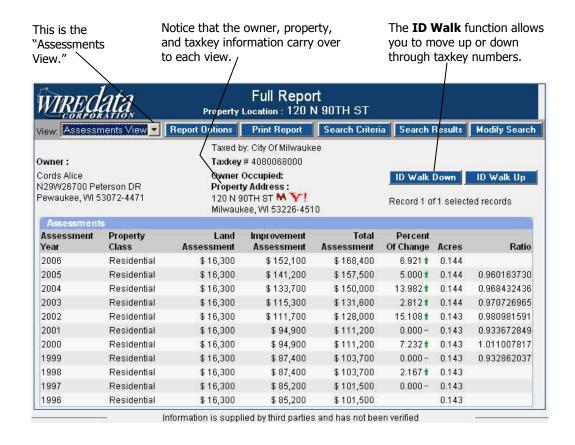
If you have more than one match, the system displays the Browse Results screen. If you have a single match, the system displays the tax record for that match.



The next illustration shows how to change the view of a tax record. To change to a different view, select it from the View list.



The next illustration shows the Assessments View.



Using ID Walk

The ID Walk function lets you "walk up" or "walk down" parcels in accordance with tax key numbers. The next illustration shows how to use ID Walk.



Address Range

Searching for tax information by Address Range is useful if you want to locate a series of properties for a CMA or to print labels for mailings.

- 1. To start a search by address range, click Address Range in the WTREdata Search menu.
- 2. Unless you have default counties already saved in your preferences, the next screen allows you to select counties to search. (Otherwise, go to step 3.)

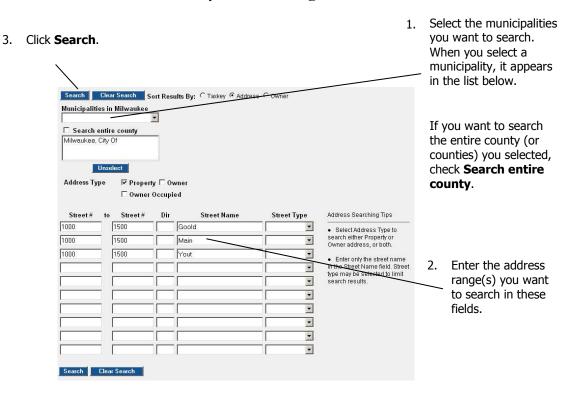
The tax system stores up to four counties you select as default until you close the tax system window. Each search you perform will include information from those counties. (You can clear the defaults through the WTREdata Preferences menu under Setup or Choose Counties.)

You can also save the counties you select as defaults for every time you use the tax system – if you always want to search for tax information in a particular set of counties, saving default counties is a good idea. It saves you from having to select the same counties over again each time you start searching the tax system. (If you need to search in a county that isn't included in your defaults, you can uncheck the counties through the WIREdata Preferences menu.)

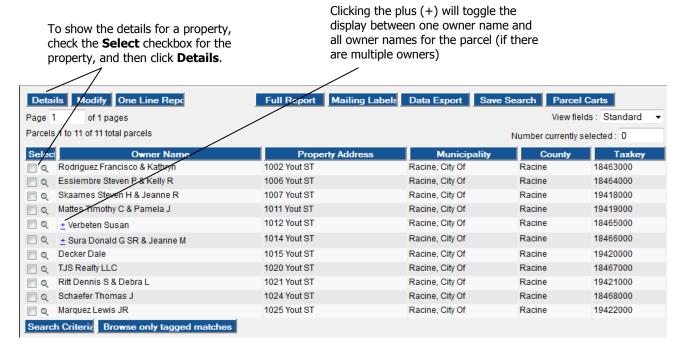


- 3. Select the county or counties you want to search, and then click **Address Range Search** button.
- 4. From the 'Municipalities in (County name)' list, choose the municipalities you want to search. If you want to search through an entire county, check **Search Entire County**.

Enter the street number ranges and street names you want to find. The Street Name field is a "begins with" field. If you type "MAIN" in the Street Name field, the system will find "Main," "Main St," "Main Street," or any street that begins with the letters "MAIN."



5. Click **Search**. The system displays the Browse Results screen. This screen displays the matches for your search. To see the details for a property, check the **Select** checkbox for the property, and then click **Details**.



The following table describes the functions of the buttons and fields on the Browse Results screen.

Does this:

This button or field:

| This button of ficia. | Does this. | | |
|----------------------------|---|--|--|
| Details | Shows the details for the properties you select. | | |
| Modify | Allows you to modify your search parameters. | | |
| One Line Report | Displays a printer friendly version of the Browse Results screen. | | |
| Full Report | Displays a full report for the selected properties. | | |
| Mailing Labels | Allows you to generate mailing labels for the selected properties (we'll talk more about this in <i>Search by All Fields</i>). | | |
| Data Export | Export data into a .csv file. | | |
| Save Search | Allows you to save your search criteria for reuse. | | |
| Parcel Carts | Lets you save the selected properties in a parcel cart, which is a way you can save and organize properties from different searches into one easy-to-retrieve place. | | |
| Page (number) of (number) | ndicates which page of properties you are currently viewing. You can type a number into the field to go directly to that page. | | |
| Previous Page | Takes you to the previous page of properties. | | |
| Next Page | Takes you to the next page of properties. | | |
| View Fields | Allows you to change your view of the data on the screen. | | |
| Number currently selected | Shows you how many properties you have selected on the screen. | | |
| Select (button) | Selects all of the listings in the search results (on all pages). When you click the Select button, all the select checkboxes will check. | | |
| Select (checkboxes) | Check the select boxes to select the tax records on those rows. | | |
| Magnifying glass | Click the magnifying glass icon next to a tax record to see the full report for that record (if you want to see more than one full report at a time, select the records, then click the Full Report button). | | |
| Owner Name 1 | Sorts the search results by the tax records' "Owner Name 1" field. Remember, a property may have more than one Owner Name field – only the Owner Name 1 field shows up on this screen. | | |
| Property Address | Sorts the search results by property address. | | |
| Municipality | Sorts the search results by municipality, then by county. | | |
| County | Sorts the search results by county name, then by municipality. | | |
| Taxkey | Sorts the search results by taxkey number. | | |
| Search Criteria | Allows you to display the search criteria you used for the current search. | | |
| Browse only tagged matches | Removes all the records from the search results screen except for the records you select with the select checkboxes. (You can return all the matches to the screen by clicking Browse all search matches – this button appears when you choose to browse only the tagged matches.) | | |

Depending on the Browse view you've selected, these fields may or may not be present.

Search by Owner Name

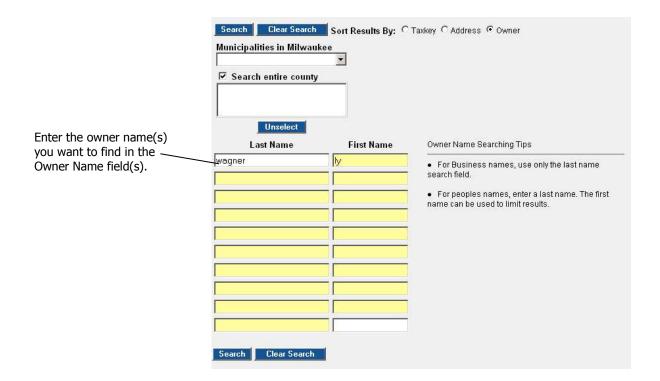
You can locate tax records by owner name. To do this:

- 1. In the WTREdata Search menu, click **Owner Name**.
- 2. Unless you have default counties saved in your preferences, the next screen allows you to select counties to search. (Otherwise, go to step 3.)

The tax system stores the counties you select as a default until you close the tax system window. Each search you perform will include information from those counties (You can clear the defaults through the *WTREdata* Preferences menu under Setup or Choose Counties.) You can also save the counties you select as defaults for every time you use the tax system – if you always want to search for tax information in a particular set of counties, saving default counties is a good idea. That way, you won't have to select counties each time you start searching the tax system. (If you need to search in a county that isn't included in your defaults, you can uncheck the counties through the *WTREdata* Preferences menu.)

After you select the counties, click the **Owner Name Search** button.

- 3. From the Municipalities in (county name) list, choose the municipalities you want to search. If you want to search through an entire county, check **Search Entire County**.
- 4. Enter the name/s you want to search for in the Owner Name field/s. Enter the last name first. Use the first initial or part of the first name only if the last name is common (like Smith).



5. If there is more than one match, the system displays the Browse Results screen. If there is a single match, the system displays the details screen – that's shown in the next step. There's an interesting result in the example that follows – we searched for "Wagner Ly" as an owner name, but the system came up with "Wagner David G," and "Wagner Lance R" as search results. Why would it do that? Keep reading...



6. If there are additional owners for a parcel, a link that is a plus ("+") appears immediately to the left of the displayed name. Clicking this link will toggle the display between one owner name and all owner names. One of the additional owner's names matches our search!



Searching by Taxkey Number

The system allows you to search directly for the tax record by a tax key number. You can also search for all tax key numbers that start with the same numbers.

To perform a Taxkey search:

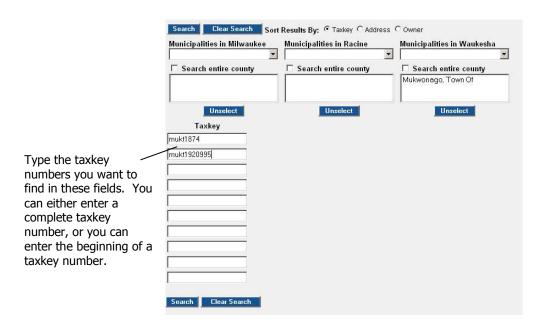
- 1. In the WTREdata Search menu, click Taxkey.
- 2. Unless you have default counties saved in your preferences, the next screen allows you to select counties to search. (Otherwise, go to step 3.)

The tax system stores the counties you select as a default until you close the tax system window. Each search you perform will include information from those counties. (You can clear the defaults through the *WTREdata* Preferences menu under Setup or Choose Counties.) You can also save the counties you select as defaults for every time you use the tax system – if you always want to search for tax information in a particular set of counties, saving default counties is a good idea. That way, you won't have to select counties each time you start searching the tax system. (If you need to search in a county that isn't included in your defaults, you can uncheck the counties through the *WTREdata* Preferences menu.)

After you select the counties, click the **Taxkey** button.

3. From the 'Municipalities in (county name)' list, choose the municipalities you want to search. If you want to search through an entire county, check **Search Entire County**.

4. Enter the tax key number(s) you want to find in the Taxkey field(s). You can enter an entire tax key number, or the beginning part of a number. Click **Search**.



Search by Assessment

An Assessment search is useful if you are trying to locate properties of a particular property class (Residential, Agricultural, Commercial, etc.) or a range of assessment information. To search by assessment data:

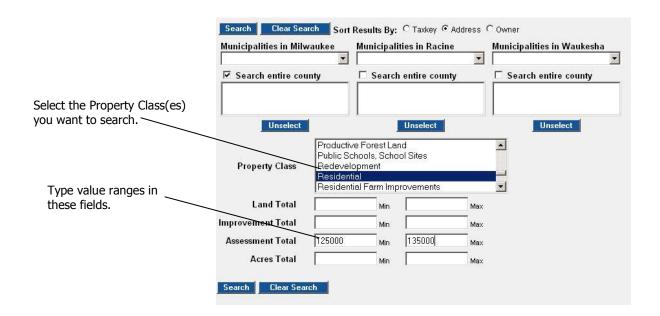
- 1. In the WIREdata Search menu, click Assessment.
- 2. Unless you have default counties saved in your preferences, the next screen allows you to select counties to search. (Otherwise, go to step 3.)

The tax system stores the counties you select as a default until you close the tax system window. Each search you perform will include information from those counties. (You can clear the defaults through the WTREdata Preferences menu under Setup or Choose Counties.)

You can also save the counties you select as defaults for every time you use the tax system – if you always want to search for tax information in a particular set of counties, saving default counties is a good idea. That way, you won't have to select counties each time you start searching the tax system. (If you need to search in a county that isn't included in your defaults, you can uncheck the counties through the WTREdata Preferences menu.)

After you select the counties, click the **Assessment Search** button.

- 3. From the 'Municipalities in (County name)' list, choose the municipalities you want to search. If you want to search through an entire county, check **Search Entire County**.
- 4. Select the property class/es you want to search from the Property Class list. (If you like, you can use Control-click to select more than one field at a time.) Enter the range of values in the Land Total, Improvement Total, Assessment Total, or Acres Total fields.



Search by All Fields

You can search tax information by all available fields in the tax system. To do this:

- 1. In the WTREdata Search menu, click the All Fields button.
- 2. Unless you have default counties saved in your preferences, the next screen allows you to select counties to search. (Otherwise, go to step 3.)

The tax system stores the counties you select as a default until you close the tax system window. Each search you perform will include information from those counties. (You can clear the defaults through the WIREdata Preferences menu under Setup or Choose Counties.)

You can also save the counties you select as defaults for every time you use the tax system; if you always want to search for tax information in a particular set of counties, saving default counties is a good idea. That way, you won't have to select counties each time you start searching the tax system. (If you need to search in a county that isn't included in your defaults, you can uncheck the counties through the *WTREdata* Preferences menu.)

After you select the counties, click the All Fields Search button.

- 3. From the 'Municipalities in (County name)' list, choose the municipalities you want to search. If you want to search through an entire county, check **Search Entire County**.
- 4. The screen shows you all of the available fields. Enter your search parameters into the fields you want to search on, and then click **Search**.

In the illustration below, we've opened the Site Info portion of the screen. Here we can search on the Legal Description, which often contains subdivision or condominium names. In our case, we are searching for Concord Place Condominiums in Mequon.

NOTE: You can search for other Info types, such as Parcel, Assessment, Taxes, Assessor, Sales; any additional information you will not find in *FlexMLS*.

rch Clear Search Sort Results By: C Taxkey @ Address When this screen opens on your Municipalities in Racine Municipalities in Waukesh screen, these sections will be open. Search entire county Search entire county When there is a plus (+) sign next to a section header indicate there is information under the heading - click Unselect + Parcel Info the heading to open the section. + Assessment Info + Taxes Info A minus (-) sign next to a header indicates that the section is open -- Site Info Historic Designation click the section header to close it. -School District If a section contains search criteria Township and you close it, a message saying Range "Has Criteria" appears next to the Section section name. Legal Description concord place + Sales Info Search Clear Search

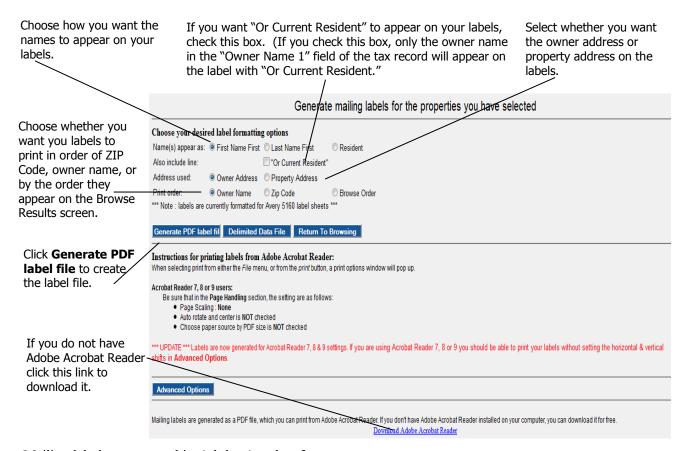
Mailing Labels

Using the results from the All Fields search in the previous page, you can to create and print mailing labels for these properties. To do this, click the **Select** button on the left side of the screen to select all of the properties. Then, click **Mailing Labels**.

Click **Mailing Labels** to print

labels for those properties. Details Modify One Line Repo Click **Select** to choose Data Export Save Search Parcel Carts View fields : Standard Page 1 of 1 pages all of the properties. Parcels 1 to 11 of 11 total parcels Number currently selected: 0 Taxk Rodriguez Francisco & Kathryr 1002 Yout ST Racine, City O 🔲 o Essiembre Steven P & Kelly R 1006 Yout ST Racine, City Of Racine 18464000 🔲 o Skaarnes Steven H & Jeanne R 1007 Yout ST Racine, City Of 19418000 Racine 🗐 o Mattes Timothy C & Pamela J 1011 Yout ST 19419000 Racine, City Of Racine 18465000 1012 Yout ST Racine, City Of Racine Q + Verbeten Susan Sura Donald G SR & Jeanne M 1014 Yout ST Racine, City Of Racine 18466000 🔲 o Decker Dale 1015 Yout ST Racine, City Of 19420000 Racine TJS Realty LLC 1020 Yout ST Racine, City Of Racine 18467000 🔳 o Ritt Dennis S & Debra L 19421000 1021 Yout ST Racine, City Of Racine 🔳 o Schaefer Thomas J 18468000 1024 Yout ST Racine, City Of Racine 🔲 o Marquez Lewis JR 1025 Yout ST Racine, City Of 19422000 Search Criteria Browse only tagged r

This screen lets us format the mailing labels, setting how names appear, which address is used, and the order the labels print in.



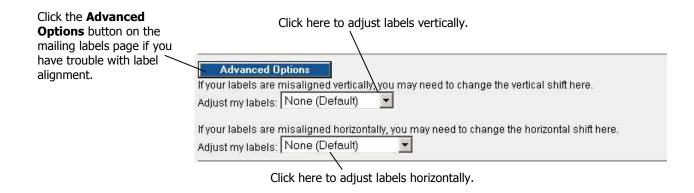
Mailing labels are created in Adobe Acrobat format.

You will need version 7 or higher of the Adobe Acrobat Reader to use these files. If you do not have Adobe Acrobat Reader version 7 or higher, click the 'Download Adobe Acrobat Reader' link at the bottom of the screen.

Following, are the instructions needed when printing labels. After generating you PDF label file, select Print from the File menu. In the printer dialog box that appears, uncheck the following under the Page Handling section:

- Auto rotate and center
- Choose paper source by PDF size
- Make sure under Page Handling that 'Page Scaling' is set to None.

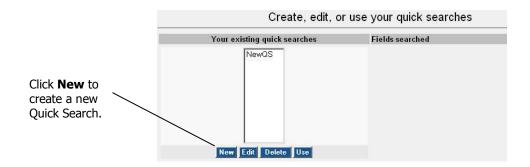
If the labels are not printing correctly, click **Advanced Options** on the mailing labels page and adjust the vertical and horizontal alignment.



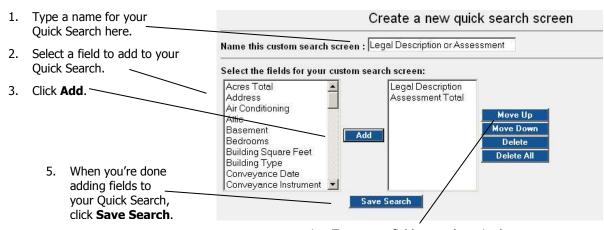
Quick Searches

You can use your own personally created Quick Searches for tax information. A Quick Search is a custom search that contains selected tax fields you want to use in a search. After you create Quick Searches, you can access them in the WIREdata Search menu by clicking Quick Searches. (You may also create and access your Quick Searches by opening the WIREdata Setup menu and clicking Quick Searches.) To create a Quick Search:

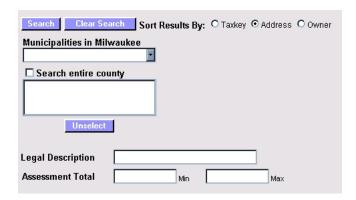
- 1. In the WTREdata Search menu, click Quick Searches. The system first displays the screen where you can select up to four the counties you would like to search. Choose your desired county/ies, and then click **Use Quick Searches Search**. This will take you to the "Choose a quick search to use" screen. Before using the Quick Search function, you must first create a Quick Search to use. When you have created and saved a Quick Search, it will appear in the "Your existing quick searches" box. Next, highlight it, and then click the **Use** button. Creating a Quick Search will be covered under Quick Searches in the section titled Setup.
- 2. Click New. The system displays the "Create a new quick search" screen.



- 3. Type a name for your Quick Search in the Name this custom search screen field.
- 4. From the list on the left, select a field you want in your Quick Search screen. Click **Add**. The field appears in the list on the right.
- 5. If you want to move fields up and down in the list, select the field you want to move, and then click **Move Up** or **Move Down**. You can also delete fields from the Quick Search. When you are finished making changes, click **Save Search**.



To move a field up or down in the list, click **Move Up** or **Move Down**. The following is an example of a Quick Search screen (the one created through the example screens shown on the previous page).

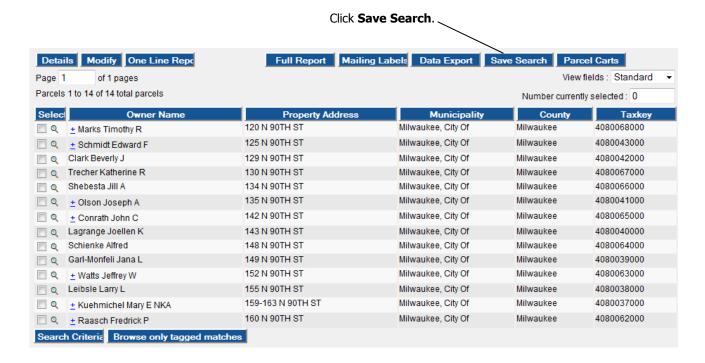


Saved Searches

You can save tax information searches for later use. A Saved Search saves the search criteria – you can then re-run the search at any time without having to re-enter the search criteria.

To save a tax search:

1. After running a search you would like to save, click the **Save Search** button. The tax system displays the 'Save your current search' screen.



2. On this screen, type a name for the saved search in the 'Name your search' field, and then click **Save Search Criteria**.



3. The tax system returns you to the browse screen.

To run saved searches, in the WTREdata Search menu, click Saved Searches. Select the search you want to run, and then click the **Run** button.

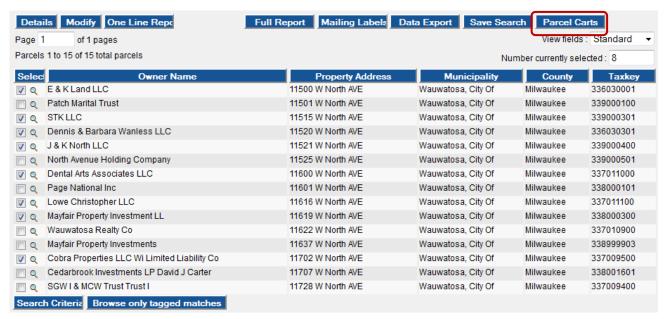
To modify or delete saved searches, open the WTREdata Setup menu and click Saved Searches. (You can run saved searches from there as well.)

Parcel Carts

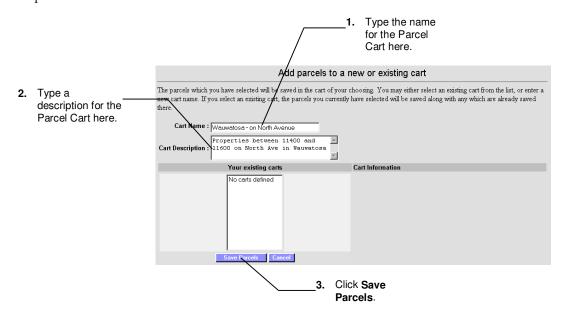
A Parcel Cart allows you to save tax records for later use. When you locate a parcel you would like to save, you select the parcel and add it to a cart. You can then open the parcel cart to see the parcels you've saved.

To create a Parcel Cart:

1. After you have searched for tax records, select the records you want to save to a Parcel Cart. Click **Parcel Carts**.



2. The tax system displays the "Add parcels to a new or existing cart screen." Type the name for your Parcel Cart in the Cart Name field. You can also type a description of the cart in the Cart Description field. Click **Save Parcels**.



To see what you've stored in a Parcel Cart, open the WTREdata Setup menu and click Parcel Carts. Select the cart you want to view, and then click the View Parcels button.

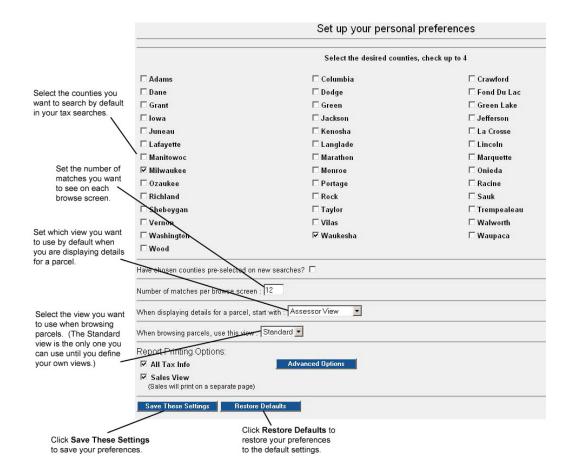
If you want to delete a Parcel Cart, highlight the cart, and then click **Delete Cart**.

If you want to edit a Parcel Cart, highlight the cart, and then click **Edit Cart**. The tax system shows you the parcels in the cart. Select the parcels you want to delete, and then click **Delete From Cart**.

Setup

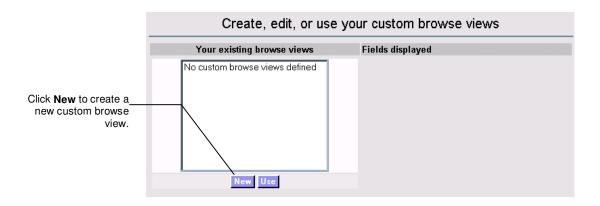
Preferences

- 1. To set your default preferences to customize the tax system for your use, open the *WTREdata* Setup menu, and click Preferences. The tax system displays the Set up your personal preferences screen.
- 2. To select up to four counties as your default counties, check the checkboxes for the counties you want to be your defaults.
- 3. The default Number of matches per browse screen is set at 12. If you would like to change the number of matches that display on the browse screen, click in the box and enter the number of matches per screen for your default. You can set this value up to 99.
- 4. For the display, the box next to "When displaying details for a parcel," start with the page set to default to Assessor View. If you wish to have a different view when you are displaying details, click on the arrow in the drop-down box next to Assessor View and highlight the view you want to set as your default.
- 5. By default, the option "When browsing parcels uses this view," is set.
- 6. You will only be able to select other browsing views if you create them (see *Browse Views* on p.124).

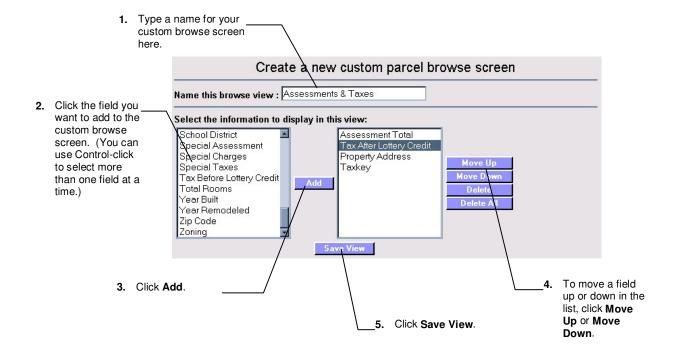


Browse Views

- 1. To create your own views that you can choose on the browse screen, open the *WIREdata* Setup menu, and click Browse Views. The system displays the "Create, edit, or use your custom browse views setup screen."
- 2. To create a new browse screen, click **New**. The system displays the "Create a new custom parcel browse screen."



- 3. Type the name for the browse view in the "Name this browse view" field.
- 4. To add fields to your browse screen, click a field you want to add (you can also double-click the field), then click the **Add** button. (If you like, you can use Control-click to select more than one field at a time.) The field appears in the list to the right.
- 5. When you have finished selecting the fields for your browse screen, you can choose to move them up or down in the list as necessary. You can also delete fields from the browse view. When you are finished making changes, click **Save View**.



Update Information

Update Information is sorted by county, and then municipality within each county. As information becomes available, the dates shown will reflect the latest update by that county or municipality. Below is a partial view of this screen.

| Glendale, City Of | 12-14-2005 | 08-04-2006 NEW! |
|---------------------------|------------|-----------------|
| Greendale, Village Of | 12-09-2005 | 08-11-2006 |
| Greenfield, City Of | 01-19-2006 | |
| Hales Corners, Village Of | 12-05-2005 | 02-04-2005 |
| Milwaukee, City Of | 05-31-2006 | 03-02-2006 |
| Oak Creek, City Of | 12-13-2005 | 08-05-2005 |
| River Hills, Village Of | 12-12-2005 | |
| Saint Francis, City Of | 12-16-2005 | 03-08-2005 |
| Shorewood, Village Of | 12-07-2005 | 04-28-2005 |
| South Milwaukee, City Of | 12-09-2005 | 08-04-2006 NEW! |

Archived Parcels

Archived Parcels allows you to search parcels that have no current assessments or taxes. You can start by choosing the county(ies) you would like to search, municipality/ies, and the fields you would like to use in your search, then choose Archived Parcels to begin your search.