

Online Tax Management Portfolio System

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Online Tax Management Portfolio System, Continued

Overview

The Manatee County Tax Collector now offers the ability for TaxCollector.com users to create a personalized, online Tax Management Portfolio.

In the coming months, online visitors to TaxCollector.com will be able to organize a number of their Manatee County tax related items into an easy to use portfolio system. Tax Related items will include:

- Parcels subject to property tax – **now available**
 - Vehicle and Vessel registrations – coming soon
 - Tax Certificates (for registered bidders) – coming soon
 - Resort tax accounts – coming soon
-

Features

By registering to utilize the Online Tax Management Portfolio System users will have a number of useful tools at their fingertips. Some features of the Tax Management Portfolio System will include:

- Monitor the payment status of multiple Property ID's/Accounts from one screen.
 - View prior years' tax history.
 - Pay property taxes online via electronic debit of checking account or credit card.
 - Monitor the status of vehicle registrations.
 - Renew vehicle registrations online via electronic debit of checking account or credit card.
 - Monitor the status of tax certificates and the related parcels.
 - Receive e-mail alerts and reminders.
 - Submit feature requests for development consideration.
-

Release Dates

11/22/2004 - release date for the first phase of the Online Tax Management Portfolio System. The first phase consists of the Property Tax module.

Additional modules and features will be released in the coming months. Our goal is to continuously provide new features and services as the Online Tax Management Portfolio System evolves.

Register to use the Online Tax Management Portfolio System

Where do I begin?

To utilize the Online Tax Management Portfolio System, users must first register and establish a User ID and Password.

To register, simply click on the "Register" link in the "Member's Area" menu and follow the directions that follow.

The screenshot shows the Manatee County Tax Collector website. The header includes the logo for Ken Burton Jr. and the title "Manatee County Tax Collector". The navigation menu contains links for Home, About Us, Services, Forms, Media Releases, and References. The main content area displays a "Welcome" message and a "NEWS" section with a table of recent news items. On the left, there is a "QUICK LINKS" section and a "MEMBER'S AREA" section. An arrow points to the "Register" link in the "MEMBER'S AREA" section.

Submission Date	Headline
9/2/2004 11:20:13 AM	The EOC needs bi-lingual operators
9/2/2004 10:31:34 AM	Latest Property Tax News Published
8/30/2004 10:31:34 AM	Mailing Notifies New Property Owners of the Legal Requirements Regarding Vehicle/Driver License Laws
8/20/2004 2:19:21 PM	Governor Jeb Bush has issued an Executive Order offering financial relief for services to victims of hurricane Charley
8/16/2004 1:46:40 PM	TRIM Notices of Proposed 2004 Taxes were mailed by the Property Appraiser on August 16th!
7/30/2004 1:23:29 PM	County to add tax, court service center out east
7/19/2004 2:39:12 PM	Aimee Brewer is the Manatee County Tax Collector's Employee of the Quarter
7/9/2004 3:39:12 PM	Alligator Harvest Permits Available July 12, 2004
6/29/2004 10:56:24 AM	Palmetto Historical Park will celebrate the Grand Opening of the Cypress House Military Museum and our 4th of July Social with fun for all ages
6/28/2004 1:51:12 PM	New Dove Permits Available July 1, 2004

Click on the "Register" link

Updating Your Profile

Overview

Upon the completion of your registration, you will be able to access and update the following elements of your profile at any time:

- Name
- Address
- Phone Number
- Password

To Update your Profile

The diagram below illustrates how you may update the elements of your Online Tax Management Portfolio System profile.

The screenshot displays the Manatee County Tax Collector website. The header includes the county logo and name, along with navigation tabs: Home, About Us, Services, Forms, Media Releases, and References. The main content area is titled "Online Portfolio" and shows "Wayne Hoefle's Portfolio" with tabs for "My Info", "Property Taxes", and "Comments". The "My Info" tab is active, showing fields for Password, User Name (Wayne Hoefle), Address (6766 Fairway Gardens Drive, Bradenton, FL 34203), and Phone ((941) 741-4800 - Primary). Each field has a pencil icon for editing and a plus icon for adding new information. A sidebar on the left contains "MEMBER'S AREA" and "PROPERTY SEARCH" sections. Annotations with arrows point to the pencil icons for editing and the plus icons for adding information.

Update your profile from the "My Info" tab.

Click on the pencil icon to edit the corresponding section of your profile

Click on the plus icon to add an address or phone number to your profile.

Property Tax Module

Overview

The Manatee County Tax Collector now offers the ability for users to monitor Manatee County Property ID's/Accounts.

By registering for a Management Portfolio and adding property ID's to the Property Tax Module area of the portfolio. Users may:

- Monitor the payment status of the Property ID's/Accounts
- View prior years tax history
- Pay property taxes online via electronic debit of checking account or credit card.
- Receive e-mail alerts and reminders. *

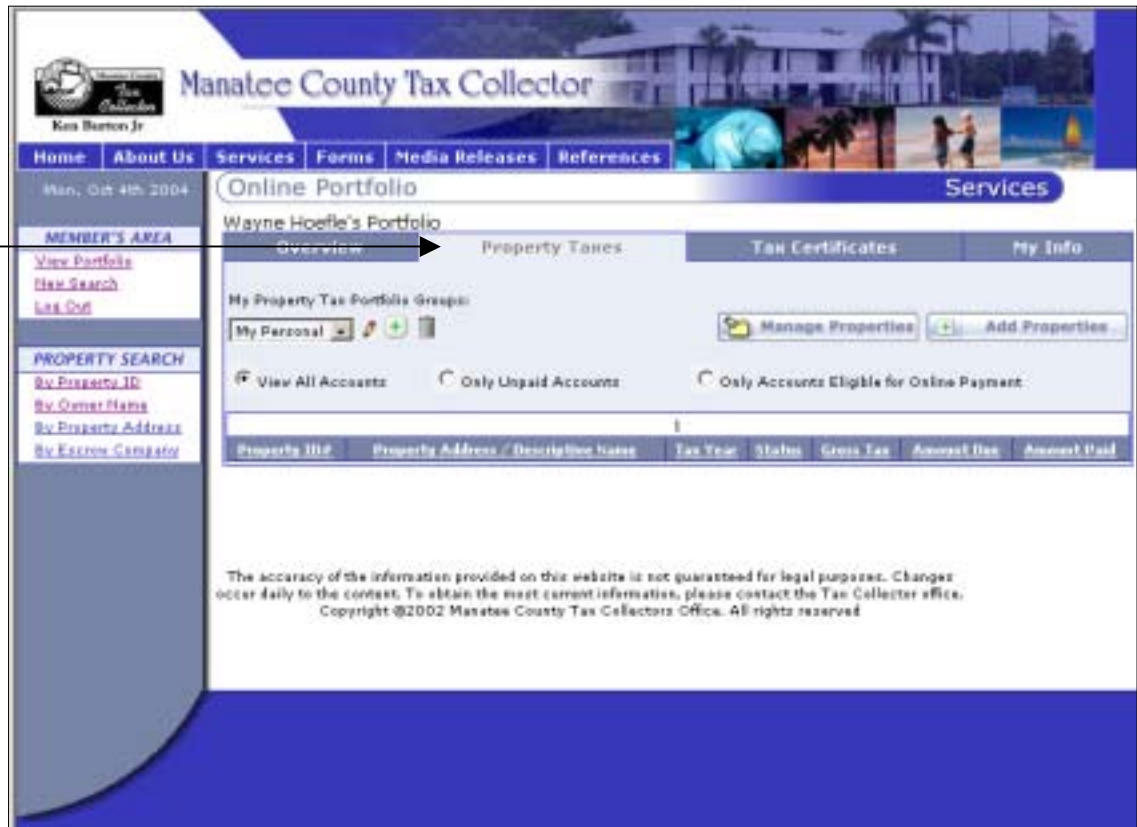
*Coming soon

Activating the Property Tax Module

Upon completing the registration process, the Property Tax Module will automatically be active.

You may click on the "Property Taxes" tab to view it's appearance and begin adding properties to your Portfolio, (*see image below*).

Property Taxes tab



Continued on next page

Property Tax Module, Continued

Adding Properties to your Portfolio

Follow the steps below to add properties to your Online Tax Management Portfolio System.

Step	Action								
1	From the Property Tax Module of your portfolio, click on the "Add Properties" button, (See diagram PT-1). This will take you to the Property Tax Search.								
2	<p>On the Property Tax Search screen input your search criteria and click the "Search" button to locate a property, (See diagram PT-2).</p> <p>Note: You may access a number of different searching options by clicking on the links located on the left side of the screen. Searches include:</p> <ul style="list-style-type: none"> • By Property ID • By Owner Name • By Property Address • By Escrow Company 								
3	<p>Upon submitting a search, a search results page will be shown with applicable properties, (See diagram PT-3)</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>Your search returned multiple properties,</td> <td>Click on the Property ID # of the property you wish to add to your portfolio. Go to step 4.</td> </tr> <tr> <td>Your search returned only one result, (typically this occurs when searching by a Property ID)</td> <td>Go to step 4.</td> </tr> <tr> <td>Your search yielded no results,</td> <td>Go to step 2 and try a new search.</td> </tr> </tbody> </table>	IF...	THEN...	Your search returned multiple properties,	Click on the Property ID # of the property you wish to add to your portfolio. Go to step 4.	Your search returned only one result, (typically this occurs when searching by a Property ID)	Go to step 4.	Your search yielded no results,	Go to step 2 and try a new search.
IF...	THEN...								
Your search returned multiple properties,	Click on the Property ID # of the property you wish to add to your portfolio. Go to step 4.								
Your search returned only one result, (typically this occurs when searching by a Property ID)	Go to step 4.								
Your search yielded no results,	Go to step 2 and try a new search.								
4	<p>You should now be on a page that displays the tax history for a particular Property ID. (See diagram PT-4)</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>This is the property you wish to add to your portfolio,</td> <td>Go to step 5.</td> </tr> <tr> <td>This is not the property you wish to add to your portfolio,</td> <td>Go to step 2 and try a new search.</td> </tr> </tbody> </table>	IF...	THEN...	This is the property you wish to add to your portfolio,	Go to step 5.	This is not the property you wish to add to your portfolio,	Go to step 2 and try a new search.		
IF...	THEN...								
This is the property you wish to add to your portfolio,	Go to step 5.								
This is not the property you wish to add to your portfolio,	Go to step 2 and try a new search.								
5	Hover over the "Add to Portfolio" button and a menu that consists of the property groups in your portfolio will appear (See diagram PT-4)								
6	<p>Click on the property group that you would like to add the property to. Now you have added the property to your portfolio!</p> <p>Note: Don't worry; you can change the group the property is in at anytime. We'll cover adding and changing groups later in this document.</p>								

Continued on next page

Property Tax Module, Continued

Diagram PT-1 The diagram below illustrates where to find the “Add Properties” button in the Property Tax Module of your portfolio.

The screenshot displays the Manatee County Tax Collector website interface. At the top, the header includes the logo for Ken Burton Jr. and the text "Manatee County Tax Collector". Below the header is a navigation menu with links for Home, About Us, Services, Forms, Media Releases, and References. The main content area is titled "Online Portfolio" and shows "Wayne Hoefle's Portfolio". There are four tabs: Overview, Property Taxes, Tax Certificates, and My Info. Under the Overview tab, there is a section for "My Property Tax Portfolio Groups" with a dropdown menu set to "My Personal" and icons for adding and deleting groups. To the right of this section are two buttons: "Manage Properties" and "Add Properties". An arrow points from the text "Add Properties button" to the "Add Properties" button. Below this section are radio buttons for "View All Accounts", "Only Unpaid Accounts", and "Only Accounts Eligible for Online Payment". At the bottom of the main content area is a table with columns: Property ID#, Property Address / Description Name, Tax Year, Status, Gross Tax, Amount Due, and Amount Paid. A footer contains a disclaimer: "The accuracy of the information provided on this website is not guaranteed for legal purposes. Changes occur daily to the content. To obtain the most current information, please contact the Tax Collector office. Copyright ©2002 Manatee County Tax Collectors Office. All rights reserved."

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Property Tax Module, Continued

Diagram PT-2 The diagram below illustrates how the property search screen may appear and the links to access alternate searches.

Links to searches →

Manatee County Tax Collector
Ken Burton Jr.

Home | About Us | Services | Forms | Media Releases | References

Thu, Sep 23rd 2004

Property Tax >> Search Services

Property Search | Additional Property Info | Help

Search by Owner

Owner:

Type in "Last Name, First Name"
Example: Murphy, John

Additional Examples:

Owner	Returns
Jones, John	all occurrences of "John Jones"
Jones, J	all occurrences of "Jones" with a first name starting with "J"

Disclaimer:

Payments will be reflected within 3 business days, with the exception of those accounts that have been subdivided, combined or corrected. Not all tax accounts are eligible for online payment. Certain account statuses require the taxpayer to call the office for remittance instructions and the amount due. Unpaid delinquent accounts do not include penalties and interest and are not available for online payment. All payments and amounts due are posted using Eastern Standard Time (EST). All online payment transactions are final, and cannot be reversed, cancelled or post-dated. The accuracy of the information provided on this website is not guaranteed for legal purposes, and we are not responsible for payment transactions that could not be processed as the result of technical difficulties such as downtime due to system maintenance or any other occurrence. Incorrect data entry or rejection of payment by your financial/credit card institution could result in additional fees and loss of applicable discount. Utilization of this website indicates understanding and acceptance of this statement by the user.

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Property Tax Module, Continued

Diagram PT-3 The diagram below illustrates how the property search results screen may appear.

The screenshot shows the Manatee County Tax Collector website. The header includes the logo and name of the tax collector, navigation tabs for Home, About Us, Services, Forms, Media Releases, and References, and a date of Wednesday, September 22nd, 2004. The main content area is titled 'Property Tax >> Search Results' and includes a search bar with options for 'Property Search', 'Additional Property Info', and 'Help'. Below the search bar, there are instructions on how to pay taxes or view information on a particular property. The results are divided into 'Real Estate' and 'Personal Property' sections. The Real Estate section contains a table with three rows of data. The Personal Property section contains a table with the text 'No data found'. A footer contains a disclaimer and copyright information.

Manatee County Tax Collector
 Home About Us Services Forms Media Releases References
 Wed, Sep 22nd 2004 (Property Tax >> Search Results) Services

PROPERTY SEARCH
[By Property ID](#)
[By Owner Name](#)
[By Property Address](#)
[By Escrow Company](#)

PROPERTY TAX
[About Property Tax](#)
[Online Property Tax](#)
[Online Payment FAQ](#)
[Assessment Fee Calc](#)
[Homestead](#)
[Discount Periods](#)
[Installment Option](#)
[Research Fees](#)
[Tax Certificate Info](#)
[Property Tax Forms](#)
[Property Tax Links](#)

Property Search Additional Property Info Help

To pay taxes or view information on a particular property, click on the associated Property ID # or Account #
 To print this screen, change print layout to landscape.

Real Estate

Tax Year	Property ID #	Owner	Property Address	Type
2002	2931742997	HOEFLE, DONALD WAYNE	5715 GARDENS DR	Real Estate
2000	1711555709	HOEFLE, DONALD WAYNE	6766 FAIRMAY GARDENS DR	Real Estate
2000	2932513891	HOEPLER, MARTHA J	1822 RESTFUL DR	Real Estate

Personal Property

Tax Year	Account #	Owner	Property Address	Type
No data found				

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Search Results

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Property Tax Module, Continued

Diagram PT-4 The diagram below illustrates how the "Add to Portfolio" button may appear on the History screen for a property.

Manatee County Tax Collector
Ken Burton Jr.

Home About Us Services Forms Media Releases References

Thu, Oct 14th, 2004

Property Tax >> Tax History Results

Services

Property Search Additional Property Info Portfolio Help

To print this screen, change print layout to landscape.

Property ID: 1731555709
Property Address: 6766 FAIRWAY GARDENS DR
Type of Tax: Real Estate

PROPERTY SEARCH
By Property ID
By Owner Name
By Property Address
By Escrow Company

PROPERTY TAX
About Property Tax
Online Property Tax
Online Payment FAQ
Convenience Fee Calc
Homestead
Discount Periods
Installment Option
Research Fees
Tax Certificate Info
Property Tax Forms
Property Tax Links

Tax Year	Status	Name *	Gross Tax			Receipt #
2003	Paid	HOEFLE, DONALD WAYNE	\$1,527.40		\$1,466.30	11/22/2003 ML1222003P005399
2002	Paid	MILLER, DONALD	\$1,484.61		\$1,425.23	11/29/2002 ML1292002P027967
2001	Paid	MILLER, DONALD	\$182.25		\$174.96	12/3/2001 ML1302001P012838
2000	Paid	TARA MANATEE INC	\$123.30		\$118.37	12/5/2000 E11302000P015845

Click here to show Tax Years prior to 1998

* Only first owner appears above - see details for full ownership on current year only
** Amount Due applies to payments received by the last business day of the month

Property ID

Tax History

Add to Portfolio button

Continued on next page

Property Tax Module, Continued

Grouping Properties

The Property Tax Module will allow you to organize the properties in your portfolio into groups. You may group properties however you like. By default, your Property Tax Module will have the following two groups:

- My Personal
- My Business

You may add as many groups as you like and edit the names of any existing groups. This section will show you how to add new groups and edit existing groups.

Adding Groups

Follow the steps below to add a new group to your Property Tax Module.

Step	Action
1	From the Property Tax Module of your portfolio, click on the add button (+) under the "My Property Tax Portfolio Groups:" heading, (See diagram PG-1).
2	Enter the name of the new group in the text box provided and click on the save button, (See diagram PG-2).
The new group has been added! You can now add new properties to the group.	

Diagram PG-1

The diagram below illustrates how the add button for Tax Portfolio Groups may appear in the Property Tax module.



Continued on next page

Property Tax Module, Continued

Diagram PG-2 The diagram below illustrates how the "New Group" textbox may appear.

The screenshot shows the Manatee County Tax Collector website interface. At the top, there is a header with the logo and name of Ken Barton Jr. Below this is a navigation menu with links for Home, About Us, Services, Forms, Media Releases, and References. The main content area is titled 'Online Portfolio' and 'Services'. Under 'Online Portfolio', it shows 'Wayne Hoefle's Portfolio' with tabs for Overview, Property Taxes, Tax Certificates, and My Info. The 'Property Taxes' tab is active, displaying a 'New Group' input field and a 'Save' button. An arrow points from the text 'Group name goes here' to the 'New Group' input field. Below the input field, there are several filter buttons: Property ID, Property Address / Escrow Company, Tax Year, Status, Group Type, Account Type, and Account Print. At the bottom, there is a disclaimer: 'The accuracy of the information provided on this website is not guaranteed for legal purposes. Changes occur daily to the content. To obtain the most current information, please contact the Tax Collector office. Copyright ©2002 Manatee County Tax Collectors Office. All rights reserved.'

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Property Tax Module, Continued

Edit an Existing Group

Follow the steps below to edit an existing group in your Property Tax Module.

Step	Action
1	From the Property Tax Module of your portfolio, click on the edit button (✎) under the "My Property Tax Portfolio Groups:" heading, (See diagram PG-3).
2	Enter the new name of the group in the textbox provided and click on the save button, (See diagram PG-4). The new name has been added!

Diagram PG-3 The diagram below illustrates how the edit button for Tax Portfolio Groups may appear in the Property Tax module.



Tax Portfolio Groups Edit button

Continued on next page

Property Tax Module, Continued

Diagram PG-4 The diagram below illustrates how the Group Name textbox may appear.

The screenshot shows the Manatee County Tax Collector website interface. At the top, there is a navigation menu with links for Home, About Us, Services, Forms, Media Releases, and References. Below the navigation is a date indicator (Thu, Oct 14th 2004) and a 'MEMBER'S AREA' section with links for View Portfolio, New Search, and Log Out. The main content area is titled 'Online Portfolio' and 'Services'. Under 'Online Portfolio', there is a sub-section for 'Donald Drulia's Portfolio' with tabs for My Info, Property Taxes, Overview, Tax Certificates, and Comments. The 'Property Taxes' tab is active, showing a 'New Group Name' text input field and a 'Save' button. Below this is a table with columns for Property ID#, Property Address / Parcel Description, Tax Year, Status, Gross Val, Assessed Val, and Amount Paid. At the bottom, there is a disclaimer: 'The accuracy of the information provided on this website is not guaranteed for legal purposes. Changes occur daily to the content. To obtain the most current information, please contact the Tax Collector office. Copyright ©2002 Manatee County Tax Collectors Office. All rights reserved.'

Group Name textbox

Save Button

Continued on next page

Property Tax Module, Continued

Managing Properties

After adding properties to the Property Tax Module of your portfolio, you may utilize the "Manage Properties" feature to perform the following tasks.

- Edit/assign a descriptive name
- Delete and account from your portfolio
- Move account to a different group

To utilize the Manage Properties feature, click on the "Manage Properties" button on the top portion of the Property Tax Module, (see diagram MP-1). **Important:** This will enable you to edit all the properties to the group you were in when the Manage Properties button was clicked.

Diagram MP-1 The diagram below illustrates how the Manage Properties button may appear.

The screenshot shows the Manatee County Tax Collector website interface. The main header includes the logo and the name 'Manatee County Tax Collector'. Below the header is a navigation menu with links for Home, About Us, Services, Forms, Media Releases, and References. The main content area is titled 'Online Portfolio' and shows 'Wayne Hoefle's Portfolio'. Under 'My Info', there is a 'My Property Tax Portfolio Group' dropdown menu set to 'My Personal'. To the right of this dropdown are two buttons: 'Manage Properties' and 'Add Properties'. An arrow points from the text 'Manage Properties Button' to the 'Manage Properties' button. Below this, there is a filter section for accounts, with radio buttons for '2 Account(s) Eligible for Online Payment', 'All Accounts' (which is selected), and 'Only Unpaid Accounts'. A table displays property tax information for three properties.

Property ID#	Property Address / Descriptive Name	Tax Year	Status	Gross Tax	Amount Due	Amount Paid
1731055709	6766 FAIRWAY GARDENS DR	2004	Unpaid	\$1,982.91	\$1,903.59	
2042126652	4328 HARIBA LAKE TER	2004	Paid	\$869.52	\$834.74	\$834.74
1731801405	6311 NW 5TH AVE	2004	Unpaid	\$4,734.80	\$4,545.41	

Continued on next page

Property Tax Module, Continued

Move a property to a different group

Follow the steps below to move a property in your Tax Management Portfolio from one group to another.

Step	Action
1	From the Property Tax Module of your portfolio, click on the "Manage Properties" button on the top portion of the Property Tax Module, (see diagram MP-1). Note: Ensure that the property you wish to edit is in the active group prior to clicking the "Manage Properties" button.
2	Locate the applicable property in the Edit Mode grid and click the corresponding edit link. (See diagram MG-1)
3	Select the group you would like to assign the property to from the drop-down menu and click the Update link. (See diagram MG-2)
4	Click the "Exit edit mode" button to exit the edit mode.

Diagram MG-1 The diagram below illustrates how the Edit Mode grid may appear.

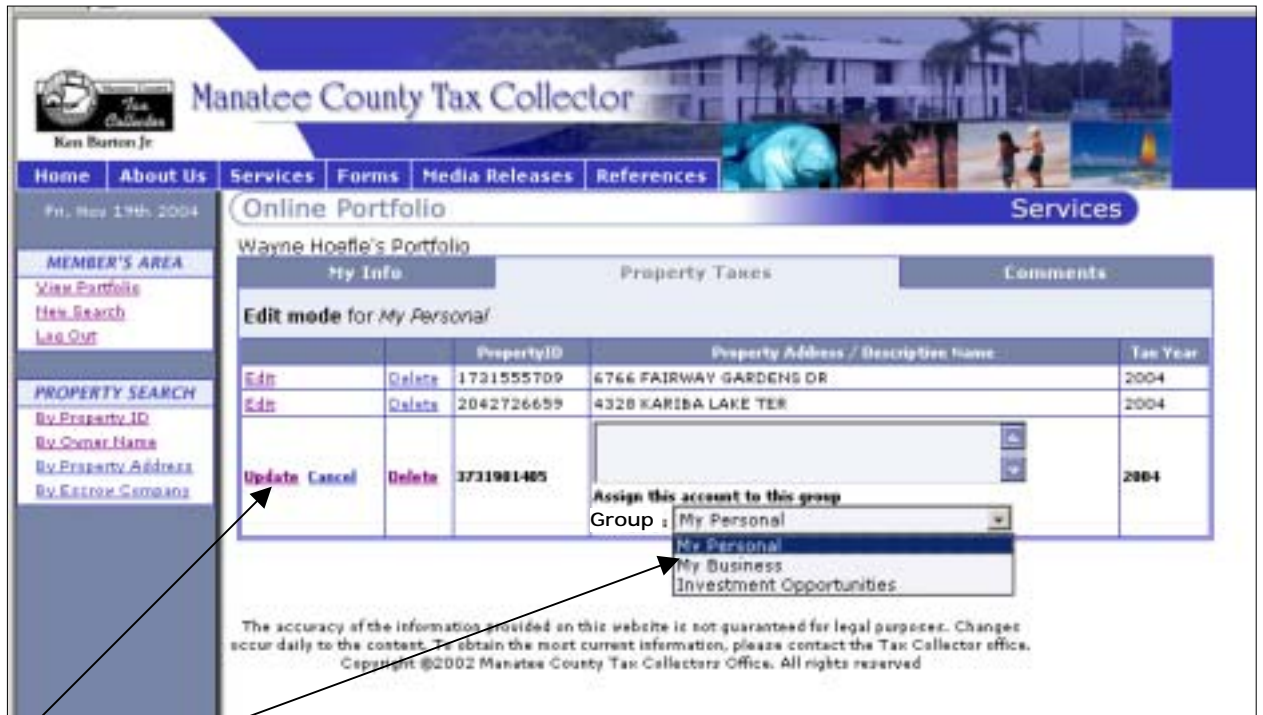
Locate the applicable property and click the corresponding edit link



Continued on next page

Property Tax Module, Continued

Diagram MG-2 The diagram below illustrates how the group drop-down menu and Update link may appear.



Select the applicable group and click the Update link.

Continued on next page

Property Tax Module, Continued

Edit/assign a descriptive name

Follow the steps below to Edit/assign a descriptive name to a property

Step	Action
1	From the Property Tax Module of your portfolio, click on the "Manage Properties" button on the top portion of the Property Tax Module, (see diagram MP-1). Note: Ensure that the property you wish to edit is in the active group prior to clicking the "Manage Properties" button.
2	Locate the applicable property in the Edit Mode grid and click the corresponding edit link. (See diagram MG-1)
3	In the text area provided, type in the descriptive name for the property and click the Update link. (See diagram MD-1)
4	Click the "Exit edit mode" button to exit the edit mode.

Diagram MG-2 The diagram below illustrates how the text area for the properties descriptive name may appear.

The screenshot shows the Manatee County Tax Collector website. The main content area is titled "Online Portfolio" and "Wayne Hoefle's Portfolio". It is in "Edit mode for My Personal". A table displays property information:

PropertyID	Property Address / Descriptive Name	Tax Year
1731555709	My Home	2004
2042726659	4328 KARIBA LAKE TER	2004

Below the table, there is a text area with the instruction: "Assign this account to this group" and a dropdown menu set to "My Personal".

In the text area provided, type in the descriptive name for the property and click the Update link.

Continued on next page

Property Tax Module, Continued

Delete a Property

Follow the steps below to delete a property in your Tax Management Portfolio.

Step	Action
1	From the Property Tax Module of your portfolio, click on the "Manage Properties" button on the top portion of the Property Tax Module, (see diagram MP-1). Note: Ensure that the property you wish to edit is in the active group prior to clicking the "Manage Properties" button.
2	Locate the applicable property in the Edit Mode grid and click the corresponding delete link. (See diagram MD-1)
3	Click the "Exit edit mode" button to exit the edit mode.

Diagram MD-1 The diagram below illustrates how the text area for the properties descriptive name may appear.

Locate the applicable property in the Edit Mode grid and click the corresponding delete link.