Introduction

The purpose of the Web Based Sales Ratio Program is to allow the Directors of Equalization and public to gain easy access to sales information. The program will allow Directors of Equalization to upload or enter their information into an online database that is accessible from anywhere in the world.

Directors are now able to upload data from their third party software directly into the sales ratio database. Their third party software will export sales and soils information into Excel spreadsheets that are then uploaded into this system.

Directors also have the option of logging the sales directly into this system without using third party software. This instruction manual will explain how to use the programs various features.

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Login Screen

This is the page you should see when you click your “link” to the Ratio Program page or type in the address.

Enter your User Name in the County Official Login box, which will be your County Name. (ie. Jones, Potter, Hughes)

Your initial password to the site will be “Password”
Changing Passwords

When you first enter your “Password”, or have your password reset because you forgot it, you will be prompted to change it. This is the screen you will see.

Please enter a password that you and the other office staff that use the system will remember. If you can’t remember the password, please contact the Department of Revenue at 1-605-773-3311, ask for the Property Tax Division and they will reset it for you.
Home Page

This is the Home Page.

From the Home Page, you can navigate to any of the tabs listed at the top of the page.

You will notice a message board on the bottom of this screen that will display important information regarding your use of sales in the sales ratio program or other important information the Property Tax Division thinks you need to know.
Clicking the “Reports” tab at the top of the Home page will bring you to this screen. You may use the drop down menu to select a number of different reports that you can run for your specific county. The following pages show the different reports that can be run.
Ag Land Dollar Value Adjustments

Selecting this report will show you the following screen:

- **County**
  Make sure you select your County in the first box.

- **Reject sale:**
  In the reject sale box, you may select “No” to run the report on all “good” sales. You may select “Yes” if you want to run the report on all “rejected” sales.

- **Year:**
  Next, select the year for which you want to run the report. Remember this is ASSESSMENT YEAR! Our Assessment years run from Nov. 1 to Oct. 31.

- **Include Edit Records:**
  If you want to include records that are currently being edited in your office and have not yet been approved by the DOR, you may select yes in this box.
  If you want to leave out those sales that are being edited, leave the box at the default setting of “NO”

You may now click “Run” to get your Ag Land Dollar Value Adjustments Report.
County Ratio Calculations Report

Selecting this report will show you the following screen.

County
Make sure you select your County in the first box.

Reject Sale:
In the reject sale box, you may select “No” to run the report on all “good” sales. You may select “Yes” if you want to run the report on all “rejected” sales.

Year:
Next, select the year for which you want to run the report. Remember this is ASSESSMENT YEAR! Our Assessment years run from Nov. 1 to Oct. 31.

Include Edit Records:
If you want to include records that are currently being edited in your office and have not yet been approved by the DOR, you may select yes in this box.
If you want to leave out those sales that are being edited, leave the box at the default setting of “No”

You may now click “Run” to get your County Ratio Calculations Report.
County Statistical Report

Selecting this report will show you the following screen.

**County**
Make sure you select your County in the first box.

**Reject sale:**
In the reject sale box, you may select “No” to run the report on all “good” sales. You may select “Yes” if you want to run the report on all “rejected” sales.

**Year:**
Next, select the year for which you want to run the report. Remember this is ASSESSMENT YEAR! Our Assessment years run from Nov. 1 to Oct. 31.

**Include Edit Records:**
If you want to include records that are currently being edited in your office and have not yet been approved by the DOR, you may select yes in this box.
If you want to leave out those sales that are being edited, leave the box at the default setting of “NO”.

You may now click “Run” to get your County Statistical Report.
County Summary Report

Selecting this report will show you the following screen.

Counties
Make sure you select your County in the first box.

Reject sale:
In the reject sale box, you may select “No” to run the report on all “good” sales. You may select “Yes” if you want to run the report on all “rejected” sales.

Class:
This box allows you to select the different classes of property that you can run your County Summary Report on. You may select one or all of the classes listed. To select all classes, click the first class and drag to the bottom of the list.

Year:
Next, select the year for which you want to run the report. Remember this is ASSESSMENT YEAR! Our Assessment years run from Nov. 1 to Oct. 31.

Include Edit Records:
If you want to include records that are currently being edited in your office and have not yet been approved by the DOR, you may select yes in this box.

If you want to leave out those sales that are being edited, leave the box at the default setting of “NO”

You may now click “Run” to get your County Summary Report.
County W/In School District Statistical

Selecting this report will show you the following screen.

County
Make sure you select your County in the first box.

Reject sale:
In the reject sale box, you may select “No” to run the report on all “good” sales. You may select “Yes” if you want to run the report on all “rejected” sales.

School District:
This box allows you to select one or multiple school districts within your county on which to run a Statistical Report. This list will only show current school districts.

Year:
Next, select the year for which you want to run the report. Remember this is ASSESSMENT YEAR! Our Assessment years run from Nov. 1 to Oct. 31.

Include Edit Records:
If you want to include records that are currently being edited in your office and have not yet been approved by the DOR, you may select yes in this box.
If you want to leave out those sales that are being edited, leave the box at the default setting of “NO”

You may now click “Run” to get your School District Statistical Report.
Real Property

Clicking on the Real Property Tab will bring you to this page.

You will see a list of options on the left hand side of the page.

The following pages will describe what you can do with these options.
Real Property – Search

This is the default page that comes up when you click on the Real Property tab.

From this page you can search for past and present sales. Current year sales will only be included in this search if they have been approved by the DOR.

The county section is the only required field for the search function. You must select your county before you can run a search.

The other fields are optional and will help narrow your search to find specific sales in your county.
After clicking on the Real Property tab, you may select New Card on the left hand side of the screen. After selecting New Card, you will see this page.

This screen allows you to enter sales directly into the sales ratio database.

You may use this function to enter all of your sales or enter sales that were left out during the upload process.

There are numerous fields that are available to enter information. There are required fields that must be completed. There are non-required fields which are optional for completion.

You will notice at the bottom of the screen you will have 3 options as shown on the next page.
After filling in the required information, you have the option to “Save”, “Back”, and “Add Approval Queue”

First, click “Save”
If you are missing required information you will see this:
You must scroll back to the top of the page and find the fields that say “Required” and fill them in.

When all information is completed, clicking “Save” should result in this screen.
When you see “Save Complete” the sale is ready to be sent to DOR.

To do this, click “Add Approval Queue”

This will pop up on your screen.

![Message from webpage](image.png)

Click “OK”

After clicking “OK” you will be returned to the “Search” page.
Real Property – Edit List

By selecting “Edit List” from the left menu on the Real Property page, you will see a screen that looks like this:

You can select your county from the drop down menu. If you have sales in your edit list, they will appear like this:
These are sales that are in the process of being changed by someone in your office and the changes have not yet been saved and resent to DOR.

To save and send to DOR, click “Edit” on the sale you want to fix and send in.

All of the card information will appear on the screen, like this:

Make sure all information is correct and fix what is not.
After filling in the required information, you have the option to “Save”, “Back”, and “Add Approval Queue”

First, click “Save”

If you are missing required information you will see this:

You must scroll back to the top of the page and find the fields that say “Required” and fill them in.
When all information is completed, clicking “Save” should result in this screen.

When you see “Save Complete” the sale is ready to be sent to DOR.

To do this, click “Add Approval Queue”

This will pop up on your screen.

Click “OK”

After clicking “OK” you will be returned to the “Search” page.

Make sure that you periodically check this list to be sure that all of your sales have been sent to DOR for approval. DOR will consider any sale in this list has incomplete information and will not approve it.
Real Property – Approval List

When you click on “Approval List” on the left hand side of the screen under the Real Property tab, you will see a page like this:

This list allows you to see what sales you have actually submitted to DOR. You can do this by selecting your county from the drop down menu or by selecting an upload group from the “upload group” dropdown menu. Upload groups show the file name that you uploaded and the date and time of the upload.

You can look over this list to make sure that the information that was sent to DOR is correct before your audit.

If you find an error in any of your information, you can correct it by following these steps.

To fix and re-send to DOR, click “Edit” on the sale you want to fix and submit. See next page for further instruction.
All of the card information will appear on the screen, like this:

Make sure all information is correct and fix what is not. After filling in the required information, you have the option to “Save”, “Back”, and “Add Approval Queue”

First, click “Save”
If you are missing required information you will see this:

You must scroll back to the top of the page and find the fields that say “Required” and fill them in.
When all information is completed, clicking “Save” should result in this screen.

When you see “Save Complete” the sale is ready to be sent to DOR.

To do this, click “Add Approval Queue”

This will pop up on your screen.

Click “OK”

After clicking “OK” you will be returned to the “Approval List” page.
Real Property – Reject List

Clicking on the “Reject List” on the Real Property page will bring you to this page:

Selecting your county will show a list of sales that could not be approved by DOR.
A list of sales and the reason they could not be approved by DOR will be shown on this page after your county is selected from the drop down menu:

The reason DOR is not approving the sale is listed on the right of the page. You may select Edit to fix what was wrong in the sale.

Make sure all information is correct and fix what is not. After filling in the required information, you have the option to “Save”, “Back”, and “Add Approval Queue”

First, click “Save”
If you are missing required information you will see this:

You must scroll back to the top of the page and find the fields that say “Required” and fill them in.
When all information is completed, clicking “Save” should result in this screen.

When you see “Save Complete” the sale is ready to be sent to DOR.

To do this, click “Add Approval Queue”

This will pop up on your screen.

Click “OK”

After clicking “OK” you will be returned to the “Reject List” page.
Real Property – Upload Errors

By clicking on “Upload Errors” under the Real Property page, you should see this page:

This page is only used if you upload your sales from another program such as Ultra, Incode, or another provider.

Selecting the file type and the county will bring up the list of errors that occurred while uploading that file and will look something like this.

You can check for errors in both your sales file and your soils file by selecting the Upload type at the top of the screen.

The error screen shows you the sequence number of the sale and what was wrong with the sale, such as no land value, or wrong school district. You can go to the “Approval List” to find your sales and edit them to fix the errors before your audit. See the “Approval List” section for instructions on how to do this.
Mobile Home

This section is dedicated to the mobile homes in your county, as you could probably tell by the title. The opening screen will look like this:

There are a couple options on the left side of the screen similar to the “Real Property” section. Examples and instructions for each option are on the following pages.
Mobile Home – Search

The search section is the opening screen of the Mobile Home tab.

From this screen you can select your county and search for your mobile homes.

County is the only required field for the search criteria.
County must be selected before you can run a search.

You may narrow down your search by filling in the other options if you have a specific sale in mind.
Mobile Home – Edit List

The edit list is the second option on the Mobile Home tab and will bring you to this screen:

At the beginning of every month, all of the mobile home transfers will be dumped into this system. You will select your county from the drop down menu, and if you have any mobile home transfers for the month, they will show up on the screen like this:

If you have sales in your list, they need to be completed with the required information.
To do this, you need to select edit on the sale that you want to complete. This will bring up a page that lists the information on the mobile home, minus the info you need to complete, and will look something like this:

![Image of Mobile Home Edit page]

Fill in the information in the correct fields and then scroll to the bottom of the page.

There you will have the option to click “Save”, “Back”, and “Add Approval Queue”

Click “Save” to save the information you entered.
If you have not entered all of the required information, you will get a screen that looks like this:

![Image of an incomplete form]

Please go back and find the fields that are marked as required and fill them in.

If you filled everything in correctly, you will get this screen:
The next step is to send the completed sales to the DOR.

To do this, click the “Add Approval Queue” button.

The “Are you sure” box will appear:

![Image of confirmation dialog box]

Click “OK”

That mobile home has now been sent to DOR for final approval.

You will be returned to the “Edit List” to complete the information for the rest of your mobile home transfers.

If your edit list is empty, you have either completed all of your mobile home transfer information, or you didn’t have any transfers for the month.
Mobile Home – Approval List

Clicking the Approval List button will bring you to this page:

Selecting this option will allow you to see what Mobile Home transfers you have sent to the DOR for approval.

Select your county, and you will be brought to this screen:

![Image of approval list interface]

Double check this information to make sure it is correct.

If it is not, click the “Edit” button on the sale that is wrong and follow the steps described in the “Mobile Home – Edit List” section of this manual.
Mobile Home – Reject List

Clicking on the Reject list will bring you to this screen.

This list will show you what mobile home transfers have not been approved by DOR and for what reason they were not approved.

By selecting your county, you can see if a sale has not been approved. If no transfers appear, your mobile homes have been accepted by DOR.

If a sale has not been approved, you will get a sale on your screen like this:

This shows the mobile home transfer that was not accepted, and gives a detailed reason on the right side of the page.

You can select “Edit” on the sale in question, fix the problems and resubmit to DOR.

For detailed instructions on this, please see the “Mobile Home – Edit List” section of this manual.
Mobile Home – Upload Errors

Clicking this link will bring up a page similar to this:

By selecting your county, you are able to see if there were any problems during the upload process for your county’s mobile home sales.

The sales will be listed by Title # and Serial # so you can find the sale in the edit list and fix whatever problem was found during the upload process.
Admin

By selecting the Admin tab at the top of the page, you are brought to a screen that looks like this:

If you are entering sales into another system such as Ultra or Incode, you will come to this tab to upload those sales into the State system.

After you have exported your sales out of your third party software, (i.e. Ultra, Incode), click the “Upload File” link on the Admin page.

You will get a screen that looks like this:

From here will select the file type that you want to upload, Sales, Soils, or Mobile Home Updates.
After selecting the Sales file or Mobile Home Updates file you will see a screen that looks like this:

After you have selected your file type, you can click “Browse” to locate your excel file that has your Sales or Mobile Home Updates.

You will then click “Upload & Process”

This may take a while for the upload process to finish, especially if you have a slower internet connection.

You will see this screen during the upload process:
When the upload completes, you will see a screen similar to this:

If your file contained errors, the red text at the bottom of this screen will show up.

If your file was error free, you will only see the green text saying it was uploaded successfully.

If you get this page when you click upload:

Please check to make sure that your Sheet Name, or the Tab at the bottom of excel is named “Sheet1”
No spaces are needed in naming the sheet or tab.
Admin – Uploading Soils Files

The soils upload is just a little different from sales and mobile homes. After you have clicked Upload File, select the file type as “Import Soils File” That will bring you to this screen:

You will notice a third box that was not available for the sales or mobile home download.

You must match your soils upload to the corresponding sales file upload.

First select “Browse” to find your excel file with your soils information.

Then from the drop down menu, select the sales file that has the matching information to your soils file.

PLEASE NOTE: SALES MUST BE UPLOADED FIRST, OR YOUR SOILS FILE WON’T HAVE ANYTHING TO ATTACH TO!

After that, the upload process is the same as the Sales file. Please see the “Admin” section on page 39 for more detailed instructions on the rest of that procedure.
Exporting to Excel

The Approval List, Edit List, Reject List, and sales that are on the Search screen have the ability to be exported to an excel spreadsheet. I will use the Approval List screenshots as an example, but all three lists and the search screen have this option in the same location.

You will notice when you select your county from the dropdown list, that some information will not fit on the screen. There is a scrollbar at the bottom of the screen. Drag it to the right and it will reveal the hidden information.

After scrolling to the right, you will see a green icon next to the column heading “Revenue Notes”. By clicking on the green “Excel” icon, it will export all of the sales that you have in your list to an excel spreadsheet.

NOTE: POP UP BLOCKERS MAY STOP THE EXCEL SPREADSHEET FROM APPEARING. PLEASE MAKE SURE THAT YOUR POP UP BLOCKER IS ALLOWING POP UP’S FROM THIS SITE.

After your spreadsheet is open, you may save it to your computer for viewing at a later time.
Printing Individual Sales

After searching for sales in the Real Property Search, you are able to print individual sales information straight from the program.

When your search results are on the screen, such as this:

You will notice a scroll bar at the bottom of the screen.

By scrolling to the right, you see a few more columns on the screen like this:

You can now see a printer icon on the far right of the screen. You can click this icon and the program will print all of the information for the specific card you selected.