

Instructions for Property Tax Excel Template

(Hawkins_Ash_PropertyTax_2022.xltm)

NOTES:

1. Excel's security level **MUST NOT BE** set to high and macros need to be allowed.
2. There is no longer a need to choose General or La Crosse template, the tool now determines the source file and imports accordingly.
3. The template is now an Excel template file, which will help prevent accidentally overwriting original file.
4. Excel 2013 or newer is required.

User Setup

The template contains user variables that can be set to personalize the preparer name and address information. Use the following instructions to modify these values:

1. Open Hawkins_Ash_PropertyTax_2022.xltm template in Excel by either right-clicking and choosing "Open" or using the File -> Open menu
2. Select the "Help – About" sheet and find the **User Variables** section.
3. Modify the values with the light yellow background
4. Review the results on the "Cover Owner Info" sheet
5. Save and close the template

If entering data for a client that was set up with template previous years:

(Make sure that there are no other spreadsheets are currently open.)

1. Open Hawkins_Ash_PropertyTax_2022.xltm template in Excel by either double-clicking "Hawkins_Ash_PropertyTax_2022.xltm" or using File -> Open -> New From Existing and selecting "Hawkins_Ash_PropertyTax_2022.xltm". The Excel Program must be open-you cannot run this through a web browser. You must know where the previous year file was saved on your computer or LAN.
 - a. Click on the 'Import Client Data' button.
 - b. Click on 'Yes' to continue.
 - c. Find the file that you want to roll over using the open dialog box that pops up. Note that you must know where the client file is stored in order to open it. You may get a message that states a link cannot be updated, hit continue.
 - d. After you select the file to convert and click OK, the macro will import last year's data and place it into the appropriate schedule in the new template. The import buttons will be removed and all schedule sheets will now be visible.
 - e. There is no longer a separate "Update" button. The import copied data into the proper final location and performed all updates. You can double check the numbers to be sure it has updated correctly. Enter the current year's adjustment data.
 - f. All checkboxes should also be properly imported.
 - g. Save the file when finished, it will open the save as dialog box which prompts you to name the file with a different name and location as the template is a read only file. We recommend including the property tax year in the file name.
 - h. Close the file. Repeat the process for the next client file.
2. To Print the form, click on the 'Print' button at the top of each sheet and choose to print entire form or just the selected sheet.

If entering data for a new client that has never been set up in the template previously:

(Make sure that there are no other spreadsheets are currently open.)

1. Open Hawkins_Ash_PropertyTax_2022.xltm template in Excel by either double-clicking "Hawkins_Ash_PropertyTax_2022.xltm" or using File -> Open -> New From Existing and selecting "Hawkins_Ash_PropertyTax_2022.xltm". The Excel Program must be open-you cannot run this through a web browser.
 - a. Click on the 'Use Empty Form' button.
 - b. Enter the client's data. **Note that all input cells are shaded in light yellow.**

- c. Save the file when finished with a unique name in your client directory on your computer or LAN. We recommend including the property tax year in the file name.
2. To Print the form, click on the 'Print' button at the top of each sheet and choose to print entire form or just the selected sheet.

If there are any questions or comments, please contact Hawkins Ash CPAs, and ask about the Personal Property Tax Program

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