

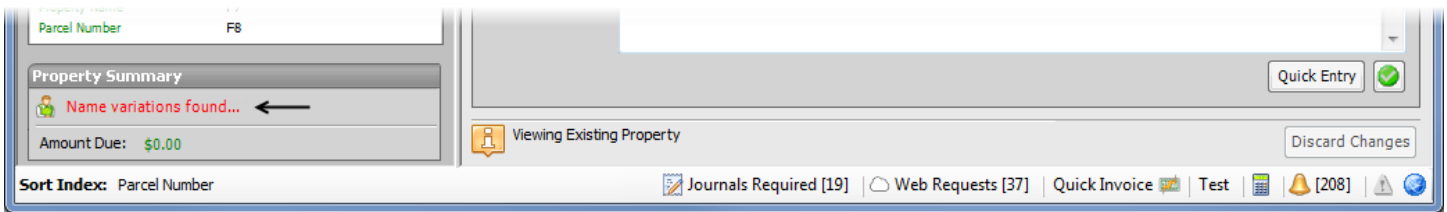
Assessing Live Link

Questions? From your BS&A program, go to **Help>Contact Customer Support** and select **Request Support Phone Call** or **Email Support**. Or, you may call us at (855) 272-7638 and ask for the appropriate support department. Questions for our I.T. department may be submitted by phone (same number), or by emailing tech@bsasoftware.com.

Often, your Assessor's office will have updated name and parcel information for records that are also in your Building Department .NET database. While you would get these changes during an import, your import schedule may be once a week or once a month, depending on your activity.

Manually changing the names can be time-consuming and inconsistent. Provided your database is grouped with the correct Assessing .NET database, the Assessing Live Link feature informs you of name variations found, and lets you update your records without running an import.

While on a property, you may see this warning:

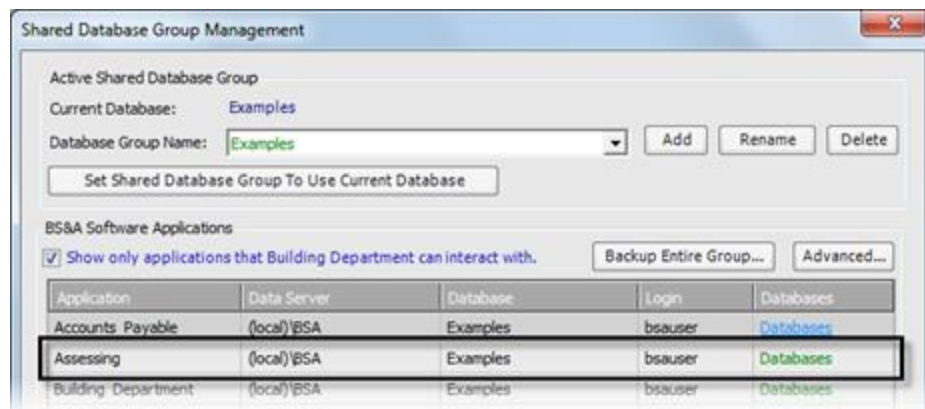


Verify Your Link to Assessing

Assessing Live Link requires your Building Department database to be grouped with the appropriate Assessing .NET database. This should be Assessing's current year database.

1. Go to **Program Setup>Administration>Shared DB Settings**.

Pictured is an example; your database name and group name will vary (for example, your Building Department database might be called Delta, while Assessing's will be called Delta 2013):

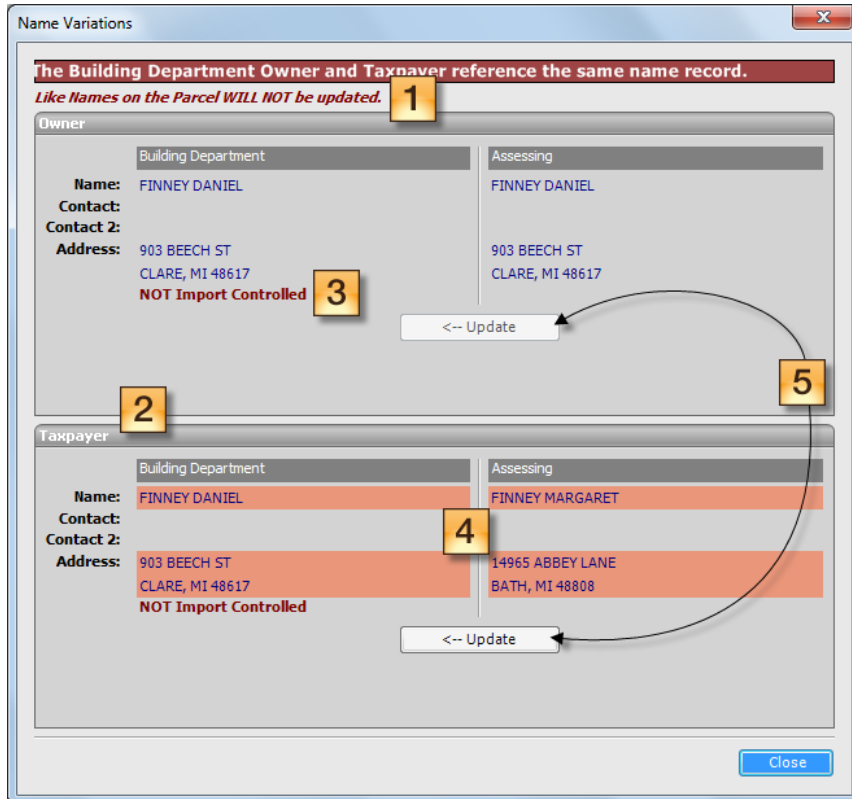


2. If you are not grouped with the appropriate database, please consult your program manual.

Update the Name(s)

It is highly recommended you make a backup before proceeding with the instructions in this topic.

1. Click the **Name variations found..** warning. The Name Variations dialog appears.



- 1 The Like Names flag is inherited from the Import Manager.
- 2 Owner and Taxpayer panes show those names as found in both your Building Department and Assessing databases.
- 3 The Import Controlled flag reflects your setting on the Name record in your BD database. The Assessing Live Link process will override this flag (i.e., if your flag is set to Import Controlled, the name will be updated, rather than being ignored as it would during the import).
- 4 The differences are highlighted for quick identification.
- 5 If no difference is found, the Update button is disabled. If a difference is found (i.e., Assessing has a newer name), the Update button is enabled for you to click and proceed with the name update.

2. Click the appropriate **Update** button, then **Yes** to confirm/continue.
3. The dialog is updated to show the change; click **Close**.

The Name Reference on the property reflects the change:

