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Landfolio North American Regional User Conference

Property Tax Management in Landfolio

Trimble

Client Challenges

Surface Land taxes for clients owning large, geographically diverse fee land represent significant financial commitment.

Monitoring annual changes to assessed values and tax amounts is cumbersome.

Clients are paying tax on fee property that they don't own.

Often no centralized system with payments made from local operations.

Standardized business processes around assessment or tax objections are lacking.

Clients potentially missing out on significant cost savings.

Landfolio Solution

Create a Parcel Register of all owned Fee Land.

Create Property Tax Groups reflecting Payee / Payor combinations.

Relate the Parcels to the Property Tax Groups.

Build mechanism for ingesting assessed values and tax obligations onto the individual parcels.

Create custom reports to identify assessed values or tax obligation increases above a specific threshold.

Build workflows to manage the receipt of the assessment and tax notices, and the objection process.

Landfolio Solution

Configure business rules that manage the unique date rules of the States/Provinces and Counties/Municipalities/Districts where taxes are paid.

Build automated notifications and distributed reports.

Populate the Tax Payment actions on the Property Tax Groups.

Synchronize with the Corporate Accounts Payable System

Ingesting Tax Data into Landfolio

Option 1: Using Structured Data Importer

Code	Name	Jurisdiction	Type	Year	LAND	IMPR	TOTAL	TAX AMOUNT
Y0503051038010	S-45B TAGISH/ATLIN RD JCT	SL Yukon	Tax Parcel	2022	$80,400.00	$10,080.00	$90,480.00	$551.93
Y0503051042050	S-358FS SQUANGA LAKE	SL Yukon	Tax Parcel	2022	$46,300.00	$67,370.00	$113,670.00	$693.39
Y0503051052020	R-23B SQUANGA LAKE	SL Yukon	Tax Parcel	2022	$132,050.00	$187,840.00	$319,890.00	$1,951.33
Y0504071117020	S-76B KD HWY/ANNIE LK RD-LEPI	SL Yukon	Tax Parcel	2022	$47,700.00	$299,710.00	$347,410.00	$2,119.20
Y0504071118010	S-19B S KD/HWY N EMERALD LK	SL Yukon	Tax Parcel	2022	$98,950.00	$51,910.00	$150,860.00	$920.25
Y0504081140100	R-40B TAGISH CAMPGRD	SL Yukon	Tax Parcel	2022	$119,550.00	$6,730.00	$126,280.00	$710.70

Ingesting Tax Data into Landfolio

Integration with OCR Technology
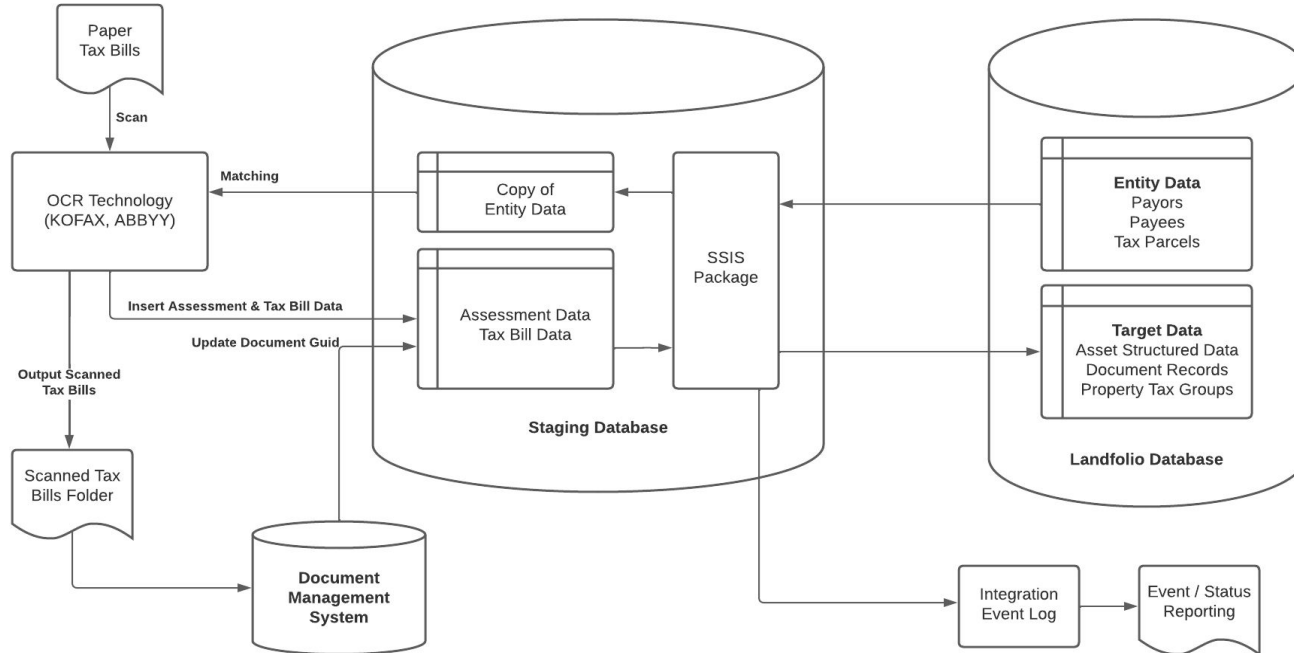
Ingesting Tax Data into Landfolio

Manual Entry from Paper Forms into Structured Data

General
Address
Conditions
Shape*
Map References
Documents
Reference Codes
Agreements
Groups
Related Licences (2)
Tax & Assessment Data
YESA
Actions Open (2)
Actions Closed
Roles
Discussions
Audit

Assessment Data

There are **2** items in the list.

Year	LAND	IMPR	TOTAL	TAX AMOUNT	
2022	80400	10080	90480	551.93	⊗
2023	81400	10080	91480	651.93	⊗

Tax Attributes

There are **2** items in the list.

Year	Class	LOT	QUAD	USE	ZONE	PLAN	
2022	131	1038	105C05	RSC	NOZ	11-147	⊗
2023	131	1038	105C05	RSC	NOZ	11-147	⊗

Reporting on Annual Changes

Example Custom Report

Tax Bill Comparison: 2018 vs. 2019

████████████ Tax Assessor - ████████ GA

Parcel	2018		2019		Difference			
	Assessed	Taxed	Assessed	Taxed	Assessed		Taxed	
███████████████████								
0012 0002	$898,160.00	$23,867.70	$898,160.00	$23,867.70	$0.00	(0%)	$0.00	(0%)
0015 0027	$18,770.00	$498.79	$19,322.00	$513.46	$552.00	(3%)	$14.67	(3%)
0019 0002	$264,596.00	$7,031.38	$271,633.00	$7,218.37	$7,037.00	(3%)	$186.99	(3%)
0020 0002	$6,080.00	$161.57	$6,080.00	$161.57	$0.00	(0%)	$0.00	(0%)
0020 0016	$95,185.00	$2,529.45	$97,711.00	$2,596.57	$2,526.00	(3%)	$67.12	(3%)
0021 0002	$326,855.00	$8,685.85	$336,043.00	$8,930.00	$9,188.00	(3%)	$244.15	(3%)
0022 0004	$79,448.00	$2,111.25	$81,690.00	$2,170.83	$2,242.00	(3%)	$59.58	(3%)
0024 0004	$18,120.00	$481.52	$18,120.00	$481.52	$0.00	(0%)	$0.00	(0%)
0025 0001	$477,342.00	$12,684.88	$491,662.00	$13,065.43	$14,320.00	(3%)	$380.55	(3%)

Workflow Example

Assessment Notice & Objection

Assessment Notice Date

Receive / Scan Assessment Notice

Notice Date + XXd

Run Comparison Report & Decide on Objections

Notice Date + XXd

File Objection

File Date + XXd

Reviews / Appeals / Hearings / Legal Action

Decision Date + XXd

Update and Verify New Assessment & Tax Data

Workflow Example

Tax Payment
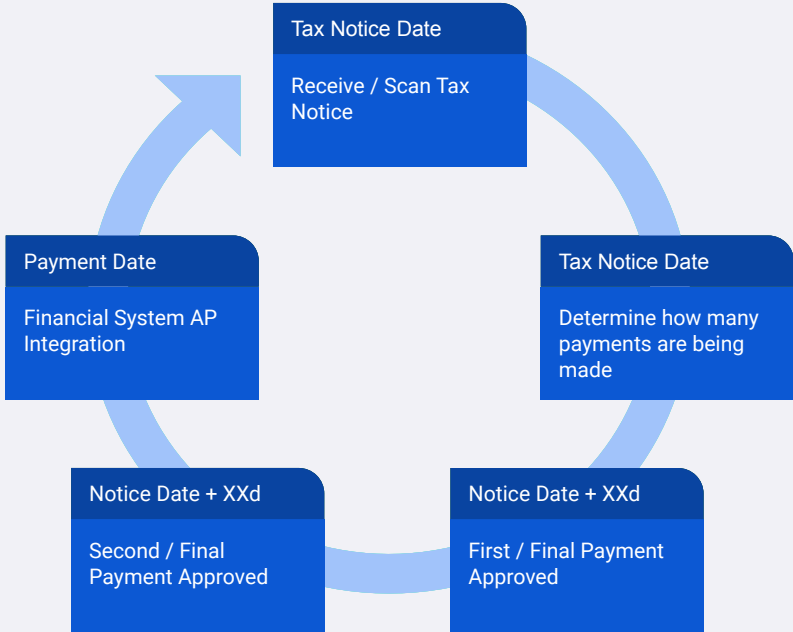
Synchronize with ERP

Flat File Export / Import

Landfolio Tax Payment Action

Landfolio Scheduled Action Exporter

Batch Number Applied to Payment Actions

Flat File Placed in Network Location

Target System Processes Batch File
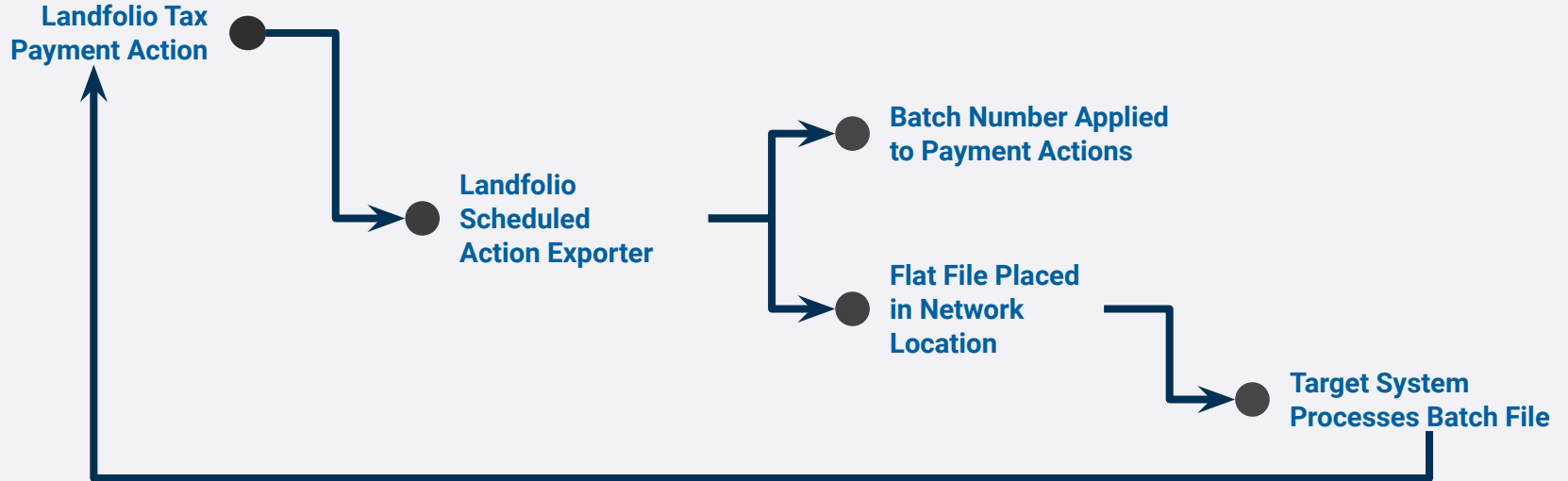
Synchronize with ERP

API, SDK, Webhooks
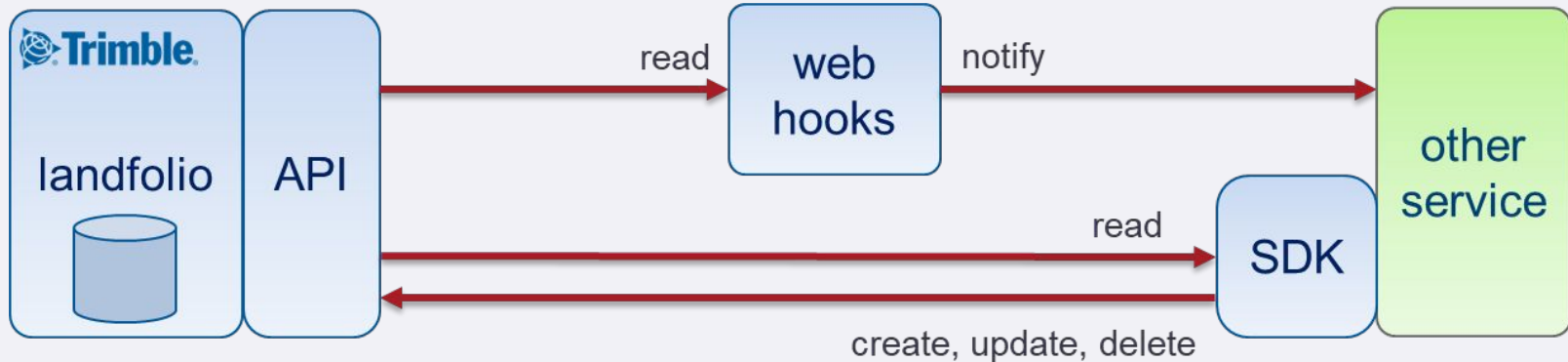
Landfolio API and SDK
A fully-featured set of development tools for interacting with Landfolio objects, conforming to validation rules and triggering workflow updates.

Landfolio Webhooks Service
An event-based notification service that follows a publisher-subscriber model to send REST, SOAP or MSMQ messages based on the Landfolio audit log.

Other services
ERP systems, financial systems, enterprise service bus, data update services, content management systems, etc.