Load Business Personal (Merchant) Data

Important: Before you begin, verify that you have a good backup with no errors from the previous night. If you do not have a good backup or are unsure how to check your backup, please call PUBLIQ Client Services for assistance at 800.235.0762.

Please read all instructions before you begin. If you anticipate needing assistance with the instructions, please call PUBLIQ Client Services as soon as possible.

1. Set Owner/Business name to switch flag.

This option allows you to determine which name (owner of business) is placed in the **Name** field on the Tax Record.

a. In Auditor, select **Special Processing > Real/Personal Update/Calculate > File Maintenance > Special Processing > System Options**.

b. Adjust the options as follows:

- **BS/PR Name Switch**: To place the owner’s name in the **Name** field and the business name in the **Address** field, select the checkbox.
  To place the business name in the **Name** field and the owner’s name in the **Address** field, clear the checkbox.

c. Once the flag has been set, select **Save** and close the window.

2. Run Update File Totals to use as verification.

a. In Auditor, select **Special Processing > Real/Personal Update/Calculate > Real/Personal Update Reports > Update File Totals**.
The message *Process Update File Totals?* displays.

b. Select **OK**.

3. Verify that the previous year's business personal (merchant) data has been deleted from your Update file.

Check the printout from **Step 2** for merchant data. If the file still contains this data, contact us at 800.235.0762 to get instructions to purge it.

Important: Ensure all merchant data is cleared before loading new data.

4. Load the latest Business Personal (Merchant) CD.

a. Place the file downloaded from FileZilla into your QS1 folder.

b. In Auditor, select **Special Processing > Real/Personal Update/Calculate > Build Personal/DOR Update File > Add Business Personal from DOR File**.

c. Confirm the **Load From** field is set to **CD**.

d. Ensure the **CD Drive Letter** field displays the letter that represents the QS1 folder drive. Make changes if necessary.

e. Select **OK**.

f. The system prompts: *Merchants are to be updated from CD. Is this correct?* Select **Yes**.

g. The system prompts: *Do you want to use DOR Districts? (YES/NO)?* Select **YES** or **NO**.

h. The system prompts: *Load Merchant Annual Certifications !!! Proceed (YES/NO)?* Select **YES**.
The system prompts: *Annual Certifications loaded - Click OK* when complete. Select **OK**.

i. The system prompts: *Load Merchant Estimate Certifications !!! Proceed (YES/NO)?* Select **YES**.
The system prompts: *Estimates have been loaded - Click OK* when the estimates load is complete. Select **OK**.

j. The system prompts: *Match Merchant Districts?*

- To update district and town codes from the current tax file (NTTAX), select **OK**.
- To skip the update, select **Cancel**.

If you cancel, you can perform the update later. To do so, return to the **Build Personal/DOR Update File** menu and select **Match Business Personal Districts With Prior Year Tax File**. Enter initials and password, and then select **OK** at the prompt.

Note: The estimates from the DOR are already coded with EST in the Auditor's code field. EST displays on the SCTC Merchants List to assist you in identifying these records.

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5. Run Update File Totals again.

These should now reflect the merchant data that was added. See Step 2 for directions.

6. Print the Merchant List.

a. In Auditor, select **Special Processing > Real/Personal Update/Calculate > Real/Personal Update Reports > DOR Business Personal (5XX) List**.

b. Complete the screen.

c. Select **Save** to print the report.