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SynergySoft Introductory Rates & Property Essentials (All States)

Overview

This course is designed for Rates Officers and will provide the essential information required to manage the SynergySoft Rates and Property systems. It is designed to show first time SynergySoft Rates and Property users how to complete the day-to-day tasks, as well as showing the more experienced user more advanced functions such as reconciliations.

Those wishing to take advantage of a refresher would also benefit from attending this course.

Who You Are

Attendees will need to have:

- Knowledge of Local Government Rating functions and concepts
- Knowledge of SynergySoft
- Fundamental knowledge of computers

Learning Outcomes

1. General Enquiries
2. General Property Maintenance

   All aspects of creating a new assessment or maintaining details on an existing assessment
3. Change of Ownership

   a. How to load a pending ownership change

   b. How to produce a Settlement Statement for settlement agents

   c. Finalising a property transfer
4. Reports

An overview of the reports available in the Rates & Property systems

5. Standard Settings

A detailed look at what standard settings control the calculation and payment of rating charges

 a. Charging Codes

 b. Rating Parameters

 c. Receipt Offsets

 d. Default General Ledger Accounts

6. Financial adjustments

How to make changes to the financial details on Rate Assessments

 a. Rate journals

 b. Cash Receipting Overview

 c. Write off small balances

 d. Offset Excess Receipts

 e. Refund Processes

 f. Raise Late payment Interest Charges

 g. Payment Arrangements

7. Reconciliations

Recommended steps to reconcile the Rates & Property Systems

 a. Valuations and Charges

 b. Rates Ledger to General Ledger

 c. Rebates

 d. Emergency Services Levy

8. End of Month Checklist

An overview of the processes that should be reviewed at the end of each calendar month

9. Notice Production

 a. A look at what settings affect Notice Production

 b. Checklist prior to Notice Production

 c. How to produce and reprint Notices

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Please note this course will *not* cover any aspects of the following areas, for which separate courses are available:

- Interim Rating, Subdivisions and Amalgamations
- Senior and Pensioner Rate Processing
- Rates Modelling
- End of Year functions
- Rates Billing