



PTR Software

transforming your process



assets » deadlines » data » obligations

our world



As tax professionals, we work with a whirlwind of **deadlines** and **data**—locations, parcels, fixed assets, jurisdictions, depreciation tables, tax rates, tax calendars and more.

The need to meet **deadlines** and **obligations** is constant. Capital expansion and contraction impact compliance, values change from year to year and assets move from one location to another. Some locations are overwhelmingly complex, while facilities continually open and close.



» people » technology » unity » answers

your solutions

You need more than just a software product to be **successful**. You need a **solution** that combines **people** and **technology**, designed to **align** with your tax department's **objectives** and to work in **unison** with the property tax cycle. **PTR by Advantax is the answer.**

PTR Technology



Advantax Expertise



Maximum Efficiency
and Savings

PTR by Advantax is a comprehensive tax management tool, delivered and supported by people who understand the world of property taxation.

property tax cycle

preparation » processing » management » payments » budgeting » analysis

“We have been using PTR for over 10 years, and can confidently say that it is the best corporate property tax management system available.”




John Henson, Bridgestone

① data preparation

Regardless of which system you choose, preparing data for automation requires time and attention. When you purchase PTR, our technical support professionals help identify key decisions you must make when bringing data into the system, ensuring the output meets your needs. We work with you to design the appropriate import specifications, enabling you to move data quickly and easily. PTR import screens are easy to use and the software accepts file imports from virtually any external system.

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Property

Assessment Date	Rendition Filing	Assessment Notices Received
		
① Data Preparation	② Compliance Processing	③ Real and Personal Property

PTR Automatio

② compliance processing

PTR provides an efficient way to file personal property tax returns and manage the compliance process. The software provides a calendar to track critical due dates and organizes data required for presentation to taxing jurisdictions. PTR allows you to manage large amounts of asset data on a global level, while enabling you to analyze specific assets or groups of assets based on the search criteria you define. The software also lets you split a single asset into multiple classifications for reporting purposes and provides an audit trail of all classification changes, preserving the information from year to year. With PTR, you can calculate final values based on your reporting methodology for comparison with each jurisdiction's assessment. PTR also supplies underlying research data for states that tax personal property, including links to state web sites.

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③ real and personal property assessment management

PTR is location driven with multiple parcels or accounts rolling up to one location. The software accumulates information relating to a property and provides centralized management of both real and personal property assessments. It captures key measurements and allows you to highlight variances to make comparisons. PTR tracks a property through the entire assessment and appeal process and also provides storage for additional management information.

“PTR is good, but the people supporting the system are even better. We have confidence in both the software and the people at Advantax.”

Robert Cox, Tyson Foods, Inc.

Tax Cycle



1 Components

④ payment processing

PTR provides a central location for real and personal property tax payments. The software tracks all payment information related to a single location, and generates automated check requests. The payment function includes a calendar to manage critical due dates and allows you to track payment discounts or other adjustments. Uniquely identified batches for each set of payments processed provides an internal audit trail. The software also helps you identify locations that are missing tax bills, enabling you to contact the jurisdiction prior to the payment due date.

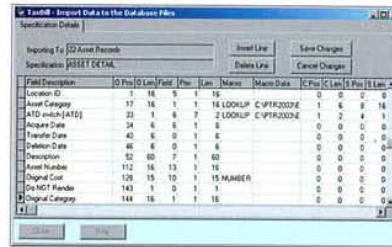
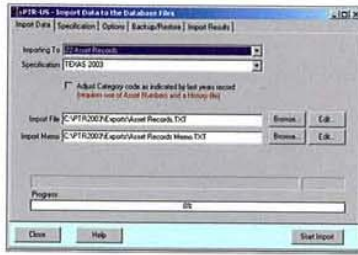
⑤ analysis and budgeting

PTR helps manage your company's property tax function, allowing you to spend time analyzing each location. The software offers over 200 standard reports and allows you to easily create custom reports to fit your specific needs. These reports highlight critical information such as compliance due dates, properties reviewed and appealed, asset listings and classifications, and tax bills paid. The tax estimate function allows you to modify rates and dollars, and enables you to project various scenarios for budget forecasting purposes.

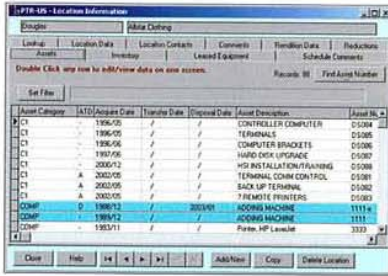
support » tools » delivery » control

comprehensive solutions

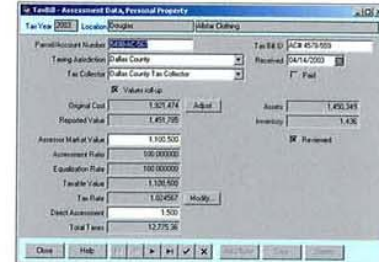
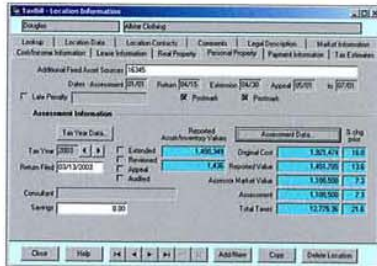
1 data preparation



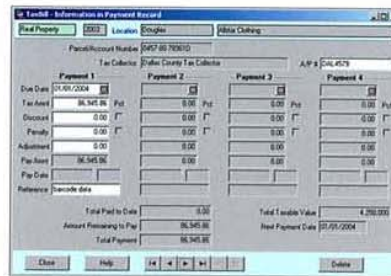
2 compliance processing



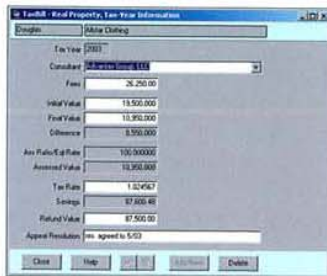
3 real and personal property assessment management



4 payment processing



5 analysis and budgeting





results » determination » research » support

your success

“One of the things that convinced me to buy PTR was the feedback I received when calling their software references. Each client spoke very highly of the technical support team’s responsiveness and knowledge, and my experience has proven their statements to be true. Advantax’s product and support is outstanding.”

Frank Castagnaro, *Gentiva Health Services*

our promise

» expertise » technology » dedication » solutions



When you purchase PTR, you get **more** than just a software program. You get a **team** of professionals **dedicated** to **exceeding** your expectations and profoundly **impacting** your **success**. That's our promise.



your answer

Supported by people who **understand** your world, Advantax provides **complete solutions** for **all** your property tax needs.

PTR Technical Specifications

Client Program

- 32-bit Windows application
- Written in C++ language
- Self-contained database
- Program updates provided via Internet or CD

Desktop System Requirements

- Pentium III 200 MHz or better recommended
- 128 MB or more of RAM recommended
- 110 MB disk space for programs (300 MB if no network)

Network Requirements (if network is desired)

- Windows operating systems preferred (NT 4 or later)
- Accommodates LAN, WAN and Terminal server environments
- Pentium or higher file server processor recommended
- 190 MB minimum space required (will increase as data is added—5000 asset records occupy 1 MB space)



PTR
by Advantax

The Advantax Advantage.



Personal Property
Consulting

For us property tax management is the world we're passionate about. In this world, we want to be unrivaled by being comprehensive, credible, and fresh.

Comprehensive. Some firms dabble with a little property tax, a little bit of this, and a little bit of that. At Advantax, we don't dabble. All we do is property tax. Every base is covered within this niche, from compliance to assessment reviews to litigation support.



Real Property
Consulting

Credible. Truth builds trust and trust builds relationships. We hire people of integrity, who tell the truth. Our tax professionals have the best certifications, designations, and are proven experts in their field.

Fresh. We're not afraid to think outside the box, ask tough questions, and leverage new technologies to better serve our clients. Staying current with changing jurisdictional laws and regulations enables us to improve our property tax cycle and ensure maximum amount of savings for our clients.

Comprehensive. Credible. Fresh. It's the way we do business.



Valuation
Consulting

Our Core Values



1. We will ensure our solutions align with your vision.
2. We won't sell you something you don't need.
3. We will do what we say, when we say we'll do it.
4. We value your trust, and will work hard to keep it.
5. We will use our influence to positively impact our industry, our community, and our world.



Compliance
Outsourcing



Compliance
Software

