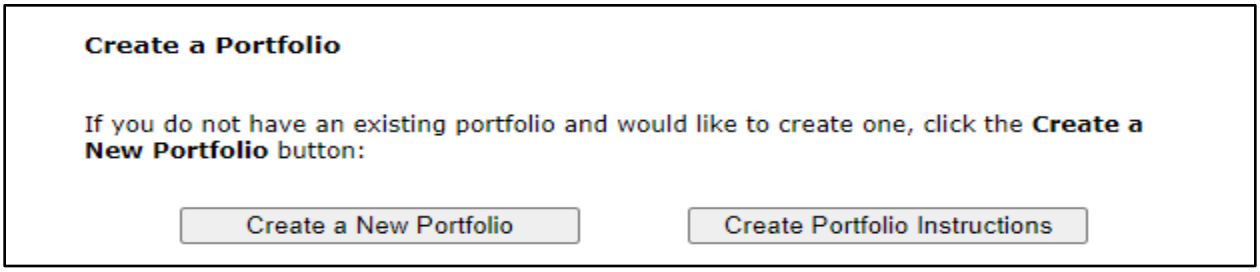
This document will provide instructions on how to create a new portfolio and how to use the portfolio to:

- Add tax accounts
- Save accounts & amounts due
- View saved portfolio accounts & amounts
- Export the results into a spreadsheet

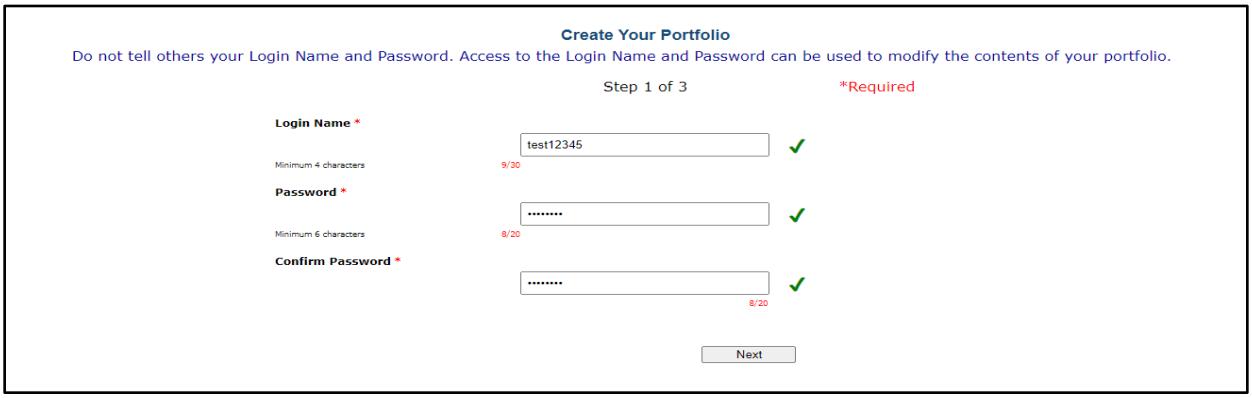
NOTE: Where available, click on the [SHOW HELP] link for more details and additional functionalities.

**1.** Click on the following link: Dallas County Portfolio Webpage or copy the URL directly to your web browser https://www.dallasact.com/act_webdev/dallas/portfolio/Login.jsp.

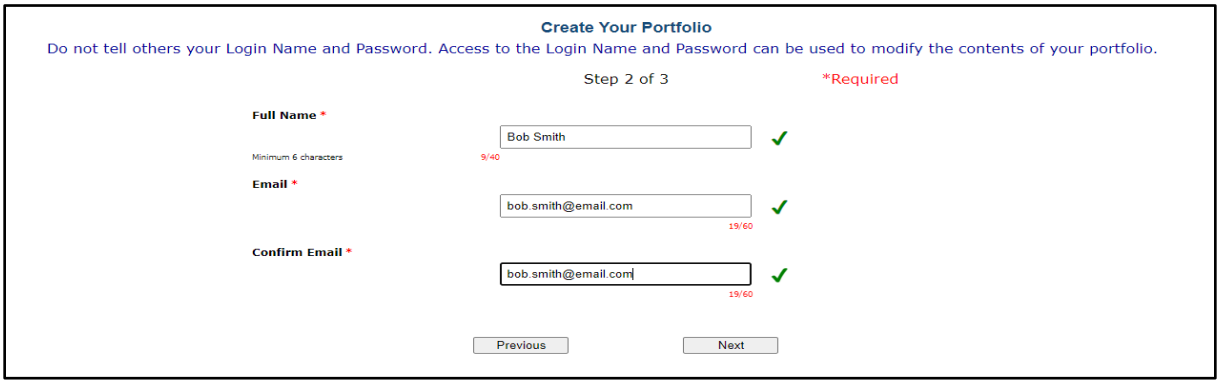
Click on the '**Create a New Portfolio'**



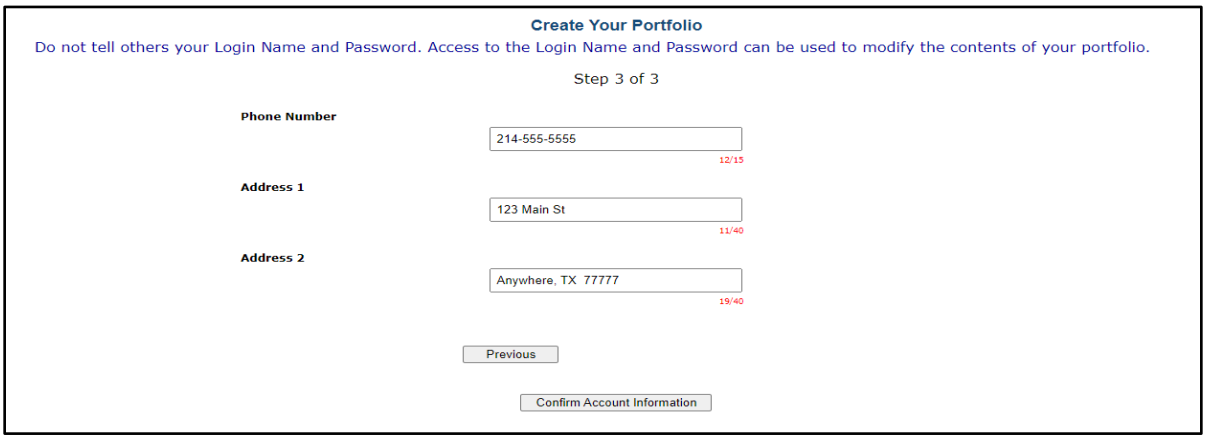

**2.** Enter a Login Name and Password. Click on **Next**.



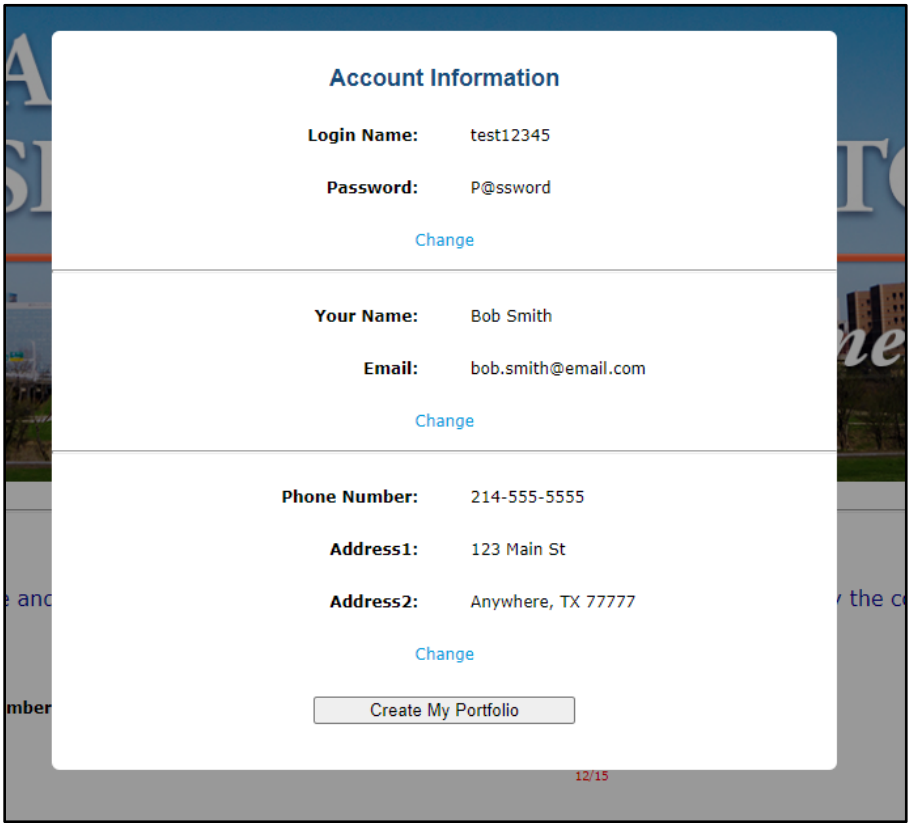

**3.** Enter your full name and email address. Click on **Next**.



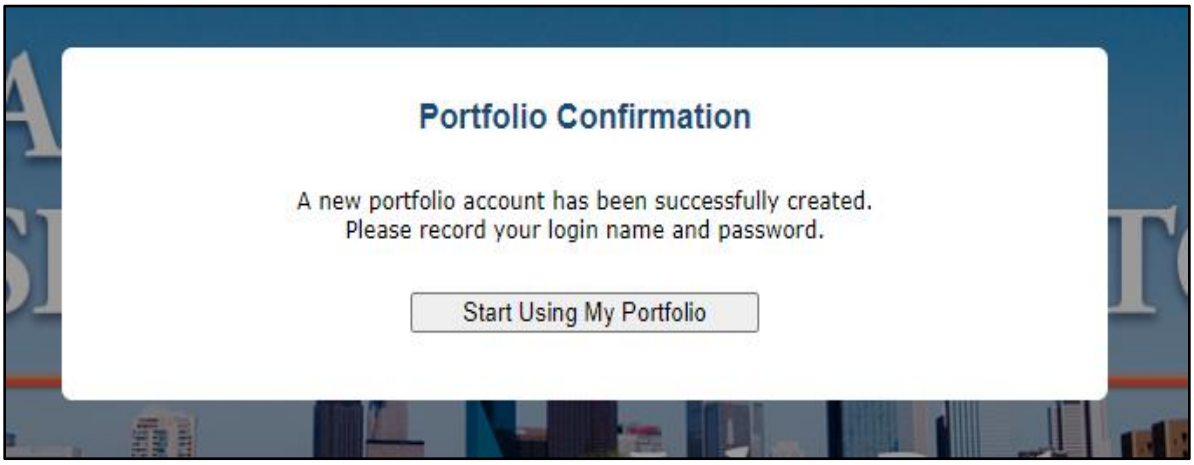
**4.** Enter your phone number and address. Click on **Confirm Account Information**.



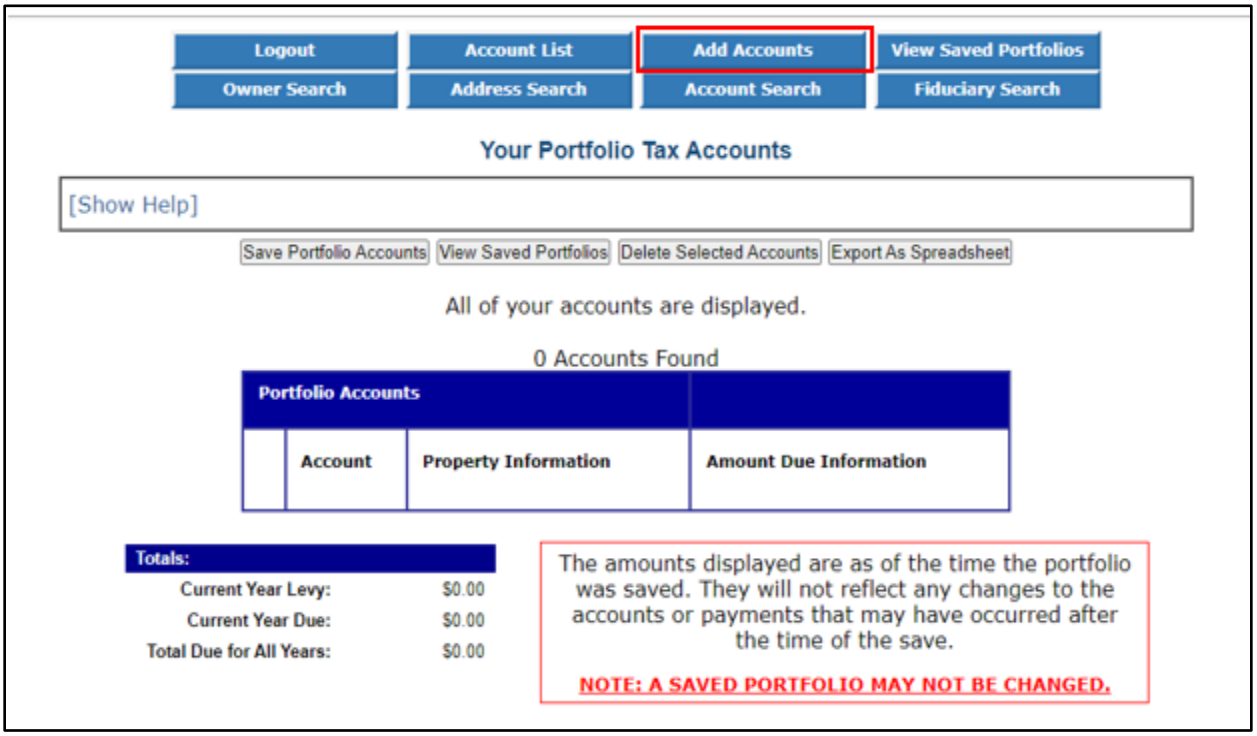

**5.** The new portfolio account information is displayed. If you need to make changes, click on **Change** in the applicable section. If no changes are needed, click on **Create My Portfolio.** Note: It is important to save your login name and password for future use. The Tax Office is not able to retrieve/reset usernames and/or passwords. You will have to create a new user account if you forget login information.



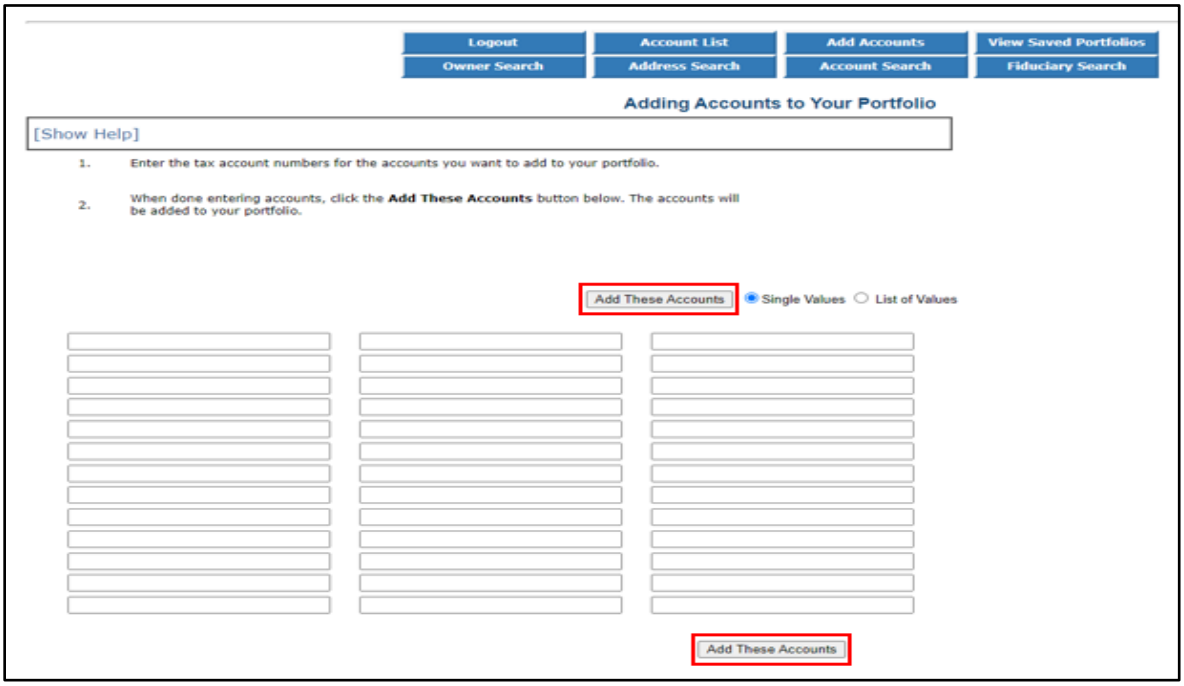
**6.** Portfolio is confirmed. Click on **Start Using My Portfolio**.



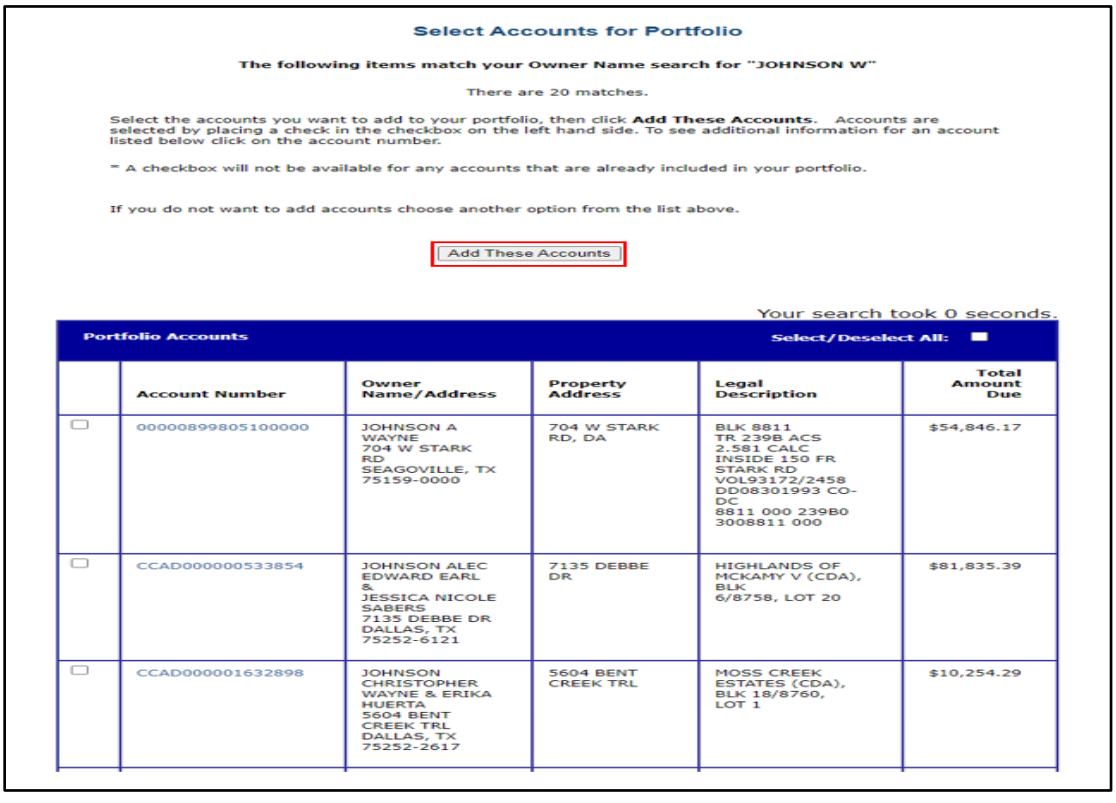

**7.** **Your Portfolio Tax Accounts** webpage will be displayed as shown below. (You can hover over **[Show Help]** for a description of the function of each navigation button.) Click the **ADD ACCOUNTS** button to begin adding accounts to the portfolio.



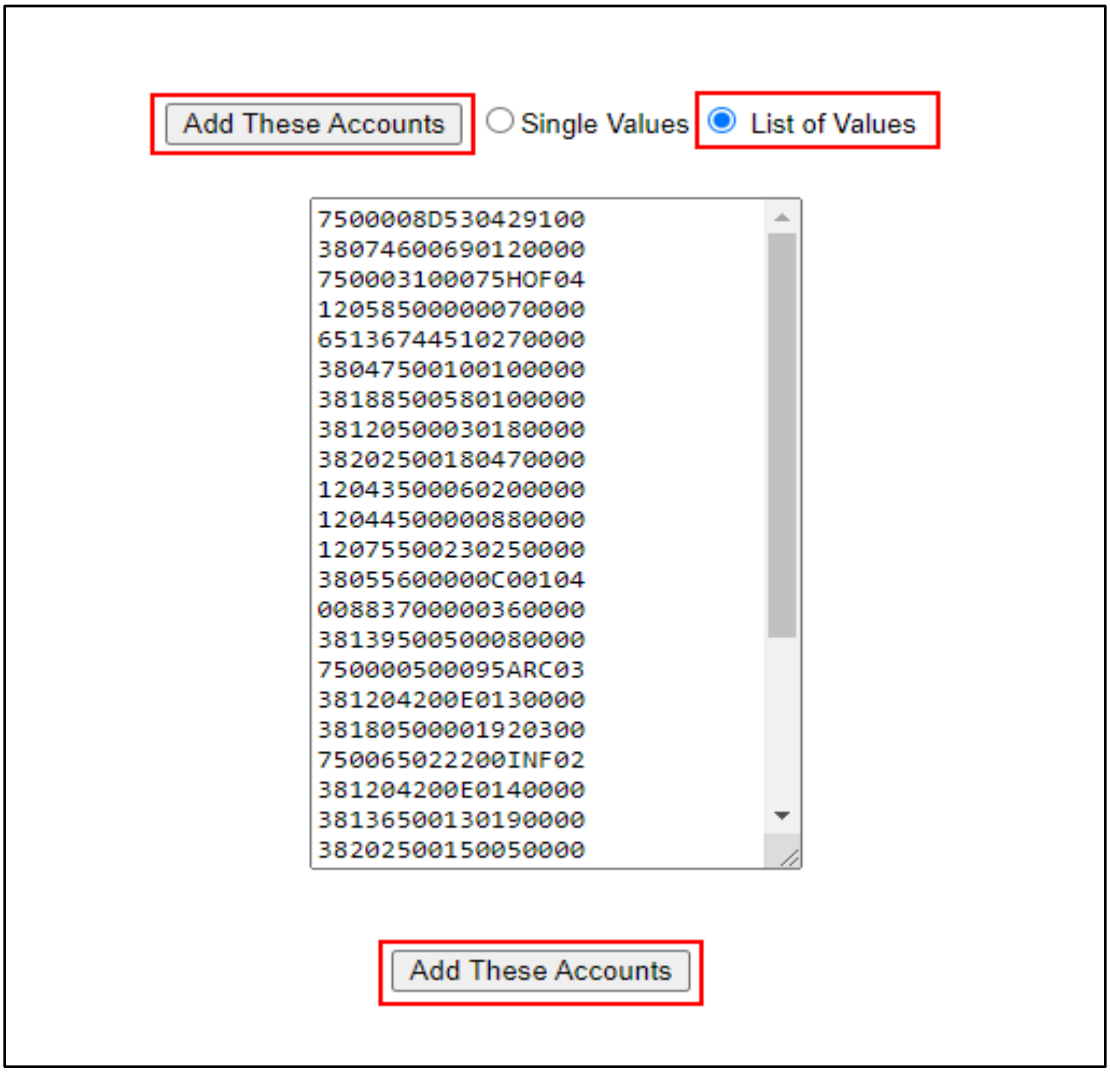
**8.** Manual Entry: Enter up to 40 account numbers and then click one of the **Add These Accounts** buttons.




**9.** If you do not have the account number, you can click the **Owner Search** or **Address Search** button to search by owner name or address. Mark the checkbox(es) for the accounts to include in the portfolio and click **Add These Accounts**. Click **Continue** on the next screen if prompted.



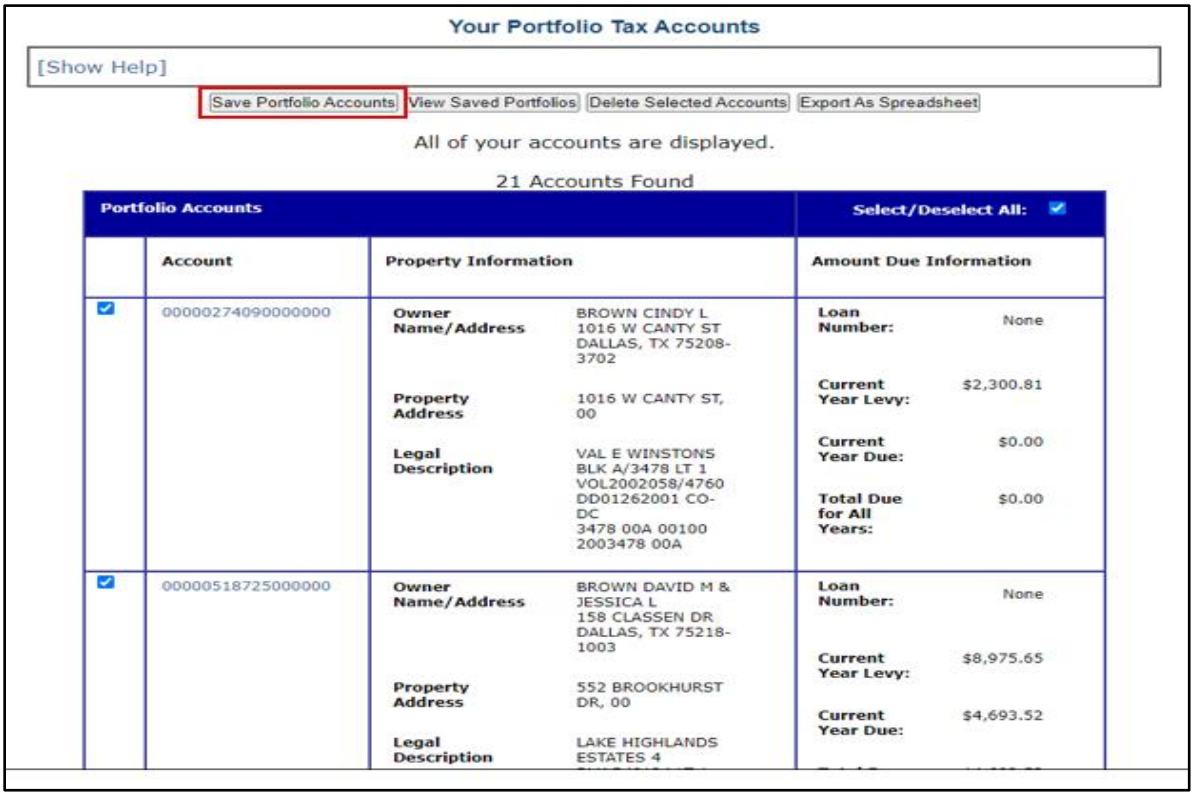
**10.** Multiple Account Entry: Click the **List of Values** radio button, copy and paste as many account numbers as needed into the empty field provided. After pasting the accounts, click on the **Add These Accounts** button. If more accounts were entered than what is displayed, a scroll bar becomes available. Click **Continue** on the next screen if prompted.

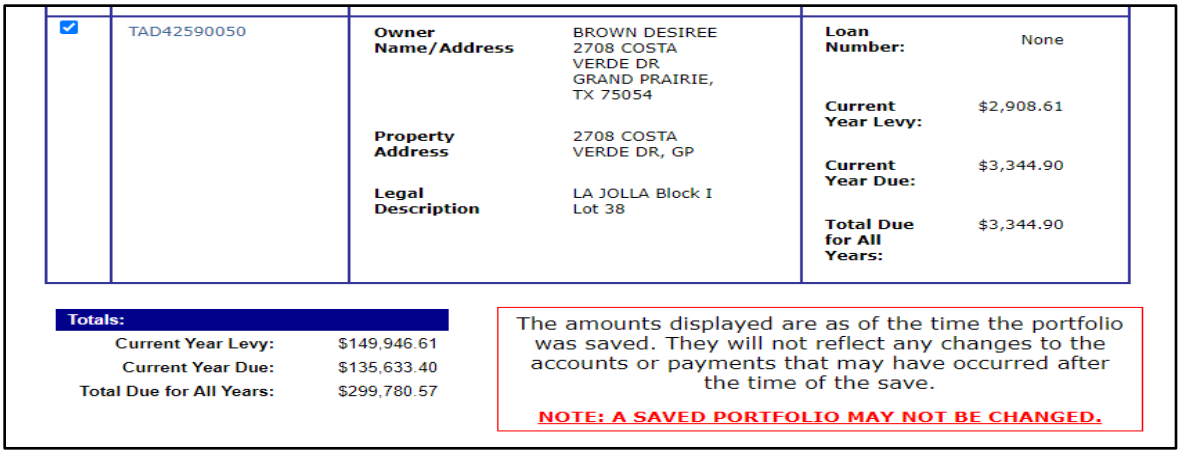



Note: Account numbers will not load if they are not formatted properly. Account numbers do not contain dashes, slashes, or spaces within or before/after the account number. Dallas County accounts are 17 digits. Accounts that are located in a county other than Dallas County will follow the format below:

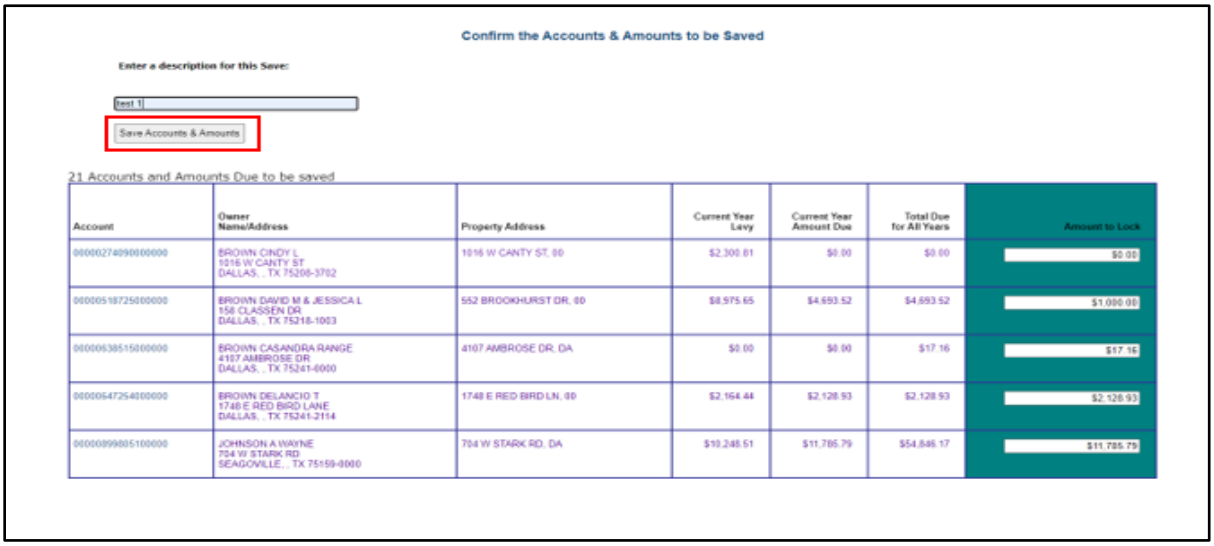
- Collin – 16 characters total; CCAD followed by zeros and then the CAD account number
- Denton - 16 characters total; DCAD followed by zeros and then the CAD account number
- Ellis - 16 characters total; ECAD followed by zeros and then the CAD account number
- Kaufman - 16 characters total; KCAD followed by zeros and then the CAD account number
- Rockwall - 16 characters total; RCAD followed by zeros and then the account number
- Tarrant – 11 characters total; TAD followed by the 8-digit CAD number

**11.** The time it takes to load the accounts depends on the number of accounts entered. After the load process is finished, the total number of accounts appears, and **Totals** are displayed at the bottom of the page. You can export the data to an Excel spreadsheet by clicking on the **Export as Spreadsheet** button. Click on **Save Portfolio Accounts**, which will direct you to the final screen to confirm the accounts and amounts to be paid.

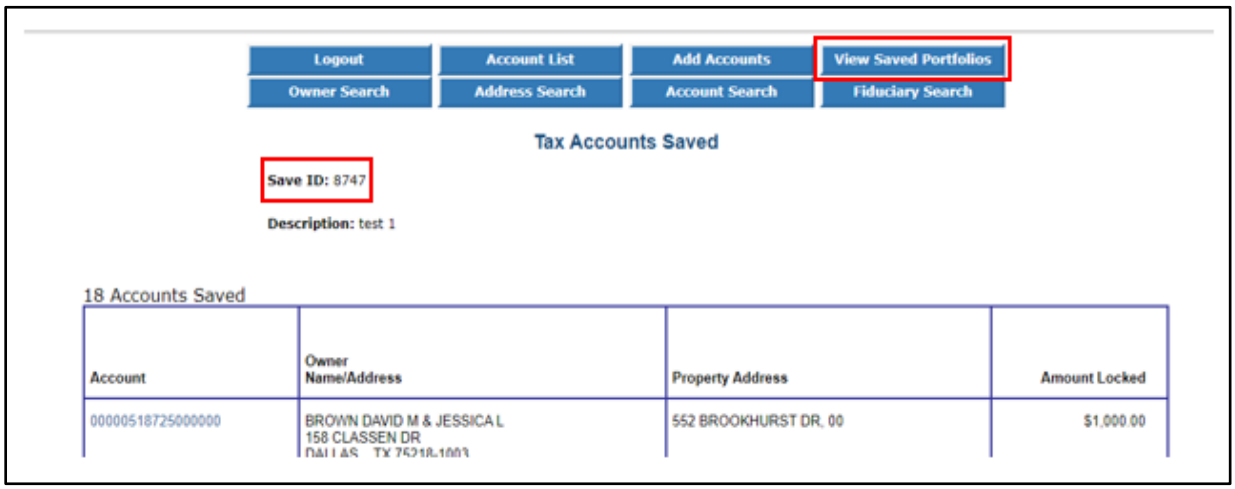


**12.** On the **CONFIRM THE ACCOUNTS & AMOUNTS TO BE SAVED** webpage, enter a description of the portfolio. This can be anything that will help you identify the portfolio. The following are listed for each account: Current Year Levy, Current Year Amount Due, and Total Due for All Years. The green Amount to Lock column defaults to the total due for all years. You can adjust this amount to reflect the amount you would like to pay, as necessary. The total amount of the payment due (after any adjustments to individual accounts) will appear at the bottom of the page. Click **Save Accounts & Amounts** to lock to portfolio. Note: Changes cannot be made to the accounts or payment amounts once the portfolio is locked.




**13.** A **Save ID number** will display. This number will be needed when making payment. Click **on View Saved Portfolios** to initiate payment.



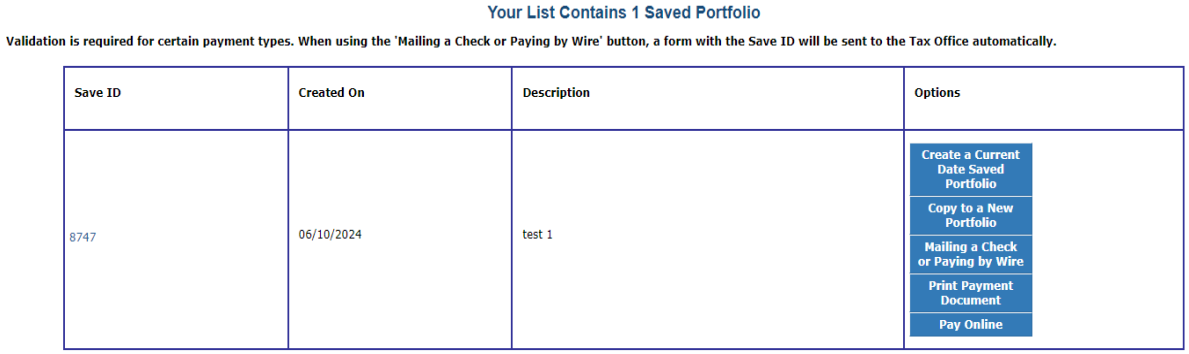
**14.** Locate the Save ID that you need to pay. To pay the Tax Amount Due, select one of the following options:

- **Mailing a Check* or Paying by Wire –** Sends an email to the Tax Office with Save ID, portfolio payment information and comments.

  *** Print Payment Document (also required if mailing a check)**– Create 'Saved Portfolio Payment Request' to remit payment by mail. Payment (write the Save ID on the memo line of the check) and a copy of the 'Saved Portfolio Payment Request' should be mailed to:

  Dallas County Tax Office
  Attention: Collections Manager
  500 Elm Street, Suite 3300
  Dallas, TX 75202

- **Pay Online** - Pay by credit card, debit card (bank convenience fee will apply), or e-Check (no charge).




The following options can be used to create future portfolios:

- **Create a Current Date Saved Portfolio** – Create a portfolio with up-to-date outstanding levy, penalty and interest amounts.
- **Copy to a New Portfolio** – Generates a new login for others to create a new portfolio using accounts with the existing Save ID.

**15.** To exit the portfolio, click on the **Logout** button.