Instructions: Import Property Spreadsheet

Two broad categories of property data is needed for each unit: Property Information & Owner Information. The column headers are color-coded blue for property information & green for owner information. Please refer to the following formatting requirements to complete this project. An instruction/example line highlighted in gray is included at the top of the spreadsheet for your reference.

Column Header	Required Format
Social Security or Federal Tax ID Number	Enter the owner's social security # (111-11-1111) or Federal Tax ID # (11-1111111.)
Property Name	**Condominiums/Townhomes/Hotels/Motels/Campgrounds**: Condo/Building Name Unit # **Single Family Dwellings**: Name of house (including main/carriage house); if house is not named, leave blank
VRBO #	Enter the unit/property's VRBO #, if applicable.
BedCount	Enter the # of bedrooms in the unit/property.
Reference	OPTIONAL. Reserved for owner/manager use (e.g. property list ID #'s or other unit/property specific info.)
Address Line 1 of Property Location	Physical street address of property (unit # not included)
Address Line 2 of Property Location	**Condominiums/Townhomes/Hotels/Motels/Campgrounds**: Name of the condo/complex/building **Single Family Dwellings**: Designate main house or carriage house, if applicable; Otherwise, leave blank
Number of Unit	Enter the unit number of the property, if applicable.
City of Property Location	NO ENTRY REQUIRED. **Protected cell autopopulates** based on zip code selected in column **K**.
State of Property Location	NO ENTRY REQUIRED. **This protected cell has been entered for you.**
Zip Code for Property Location	Select the zip code of the property from the **drop-down menu**. (City (column **I**) autopopulates based on this cell.)
Community	Select the general area of South Walton where the property is located from options in the **drop-down menu**.
Primary Telephone for the Property	Enter the telephone # for the unit/property, if applicable.
Property Type associated with this account Group	Select the type of unit/property from the **drop-down menu**: SFD=Single Family Dwelling, CTA=Condo/Townhome/Apt., CRV=Campground/RV Park, HM=Hotel/Motel. *NOTE: See hints for other property types by clicking the cell.*
Parcel ID	**Format**: 11-2S-33-44444-555-6666; From property appraiser's website: www.waltonpa.com *HINT: We copy/paste!*
Name of Property Owner	This field will sequence the list of properties/subaccounts in Excise for filing returns & can include any of the following: **Condominiums/Townhomes/Hotels/Motels/Campgrounds**: Owner's last name, Company Name, street, unit #, etc. **Single Family Dwellings**: Owner's last name, company name, subdivision name, street address, etc. *NOTE: If you want the list of units in Excise to be in unit #/address <u>numerical order</u>, then enter "123 Smith" or "55 4th St Smith's Vacations LLC". If you want the list to be in <u>alphabetical order</u> by owner/business name= "Smith, Joe", "Smith 123", "Smith's Vacations LLC", "Smith's Vacation LLC Lakeview 156", or "Smith's Vacations LLC 55 4th St".*
Owner Business Type	Select the business type that best describes the ownership structure from the **drop-down menu**.
Owner Mailing Address (columns **R-V**)	Enter the mailing address information for the owner of the property/unit. (**R**=Address Line 1, **S**=Address Line 2, **T**=City, **U**=State, **V**=Zip Code)
Owner Contact Info (columns **W-Z**)	Enter the owner contact information including phone #'s (**W, X**), fax # (**Y**, if applicable), & email address (**Z**). *NOTE: The **most important** of these columns is **email address** as this is generally our preferred method of correspondence.*
Owner Country	Enter the name of the country in which the owner primarily resides (i.e. country of owner mailing address.)
Number of Units	**Hotels/Motels**: Enter the total # of units in the hotel/motel building. **All Other Property Types**: If management company, leave blank. If individual owner, enter "1".
Sales Tax Certificate #	Enter the owner's Sales Tax Certificate # in the following format: 76-8-012222222-2.