



Munis Revenues

*Major Enhancements
Version 10.3 to 10.5*

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Major Enhancements – Munis® Version 10.3 Revenues

This document provides an overview of the major Revenues enhancements for Munis® Version 10.3. Revenues programs include Citizen Self Service (CSS) and central programs.

The Munis Revenues product contains General Revenues and Property Revenues:

- General Revenues includes Accounts Receivable, Animal Licenses, General Billing, Maine Vehicle Registration, Parking Tickets, Slip Reservations, Vehicle Stickers, and Virginia State Income Tax.
- Property Revenues includes Accounts Receivable, Business Licenses, Central Property, Permits and Code Enforcements, Property Tax Billing, and Utility Billing.
- Revenues central programs include Customer Central, Property Central, UB Central, Contract Central, and Permit Central.

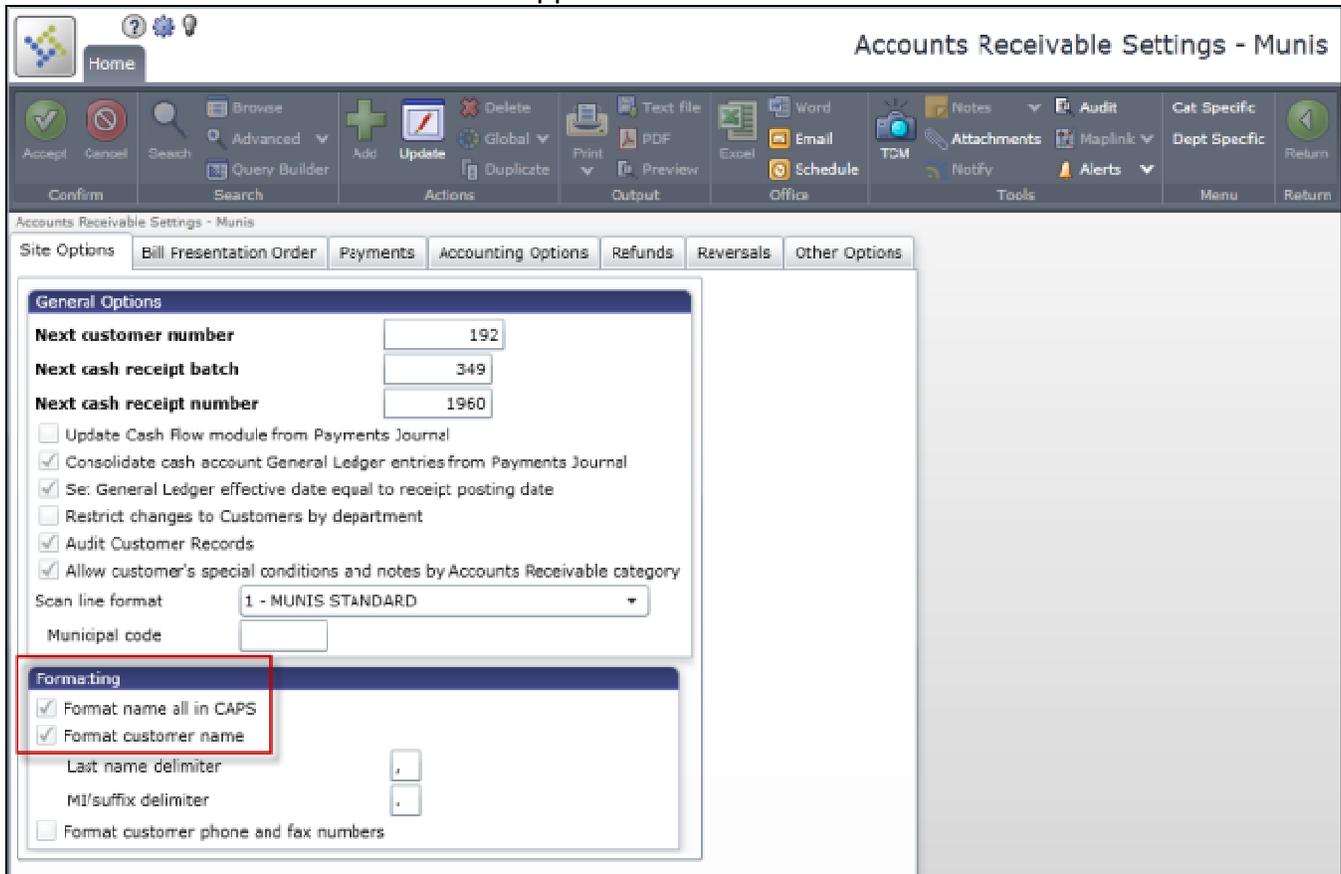
Please refer to the Version 10.3 Munis Release Notes on the Munis Knowledgebase (<http://muniskb.tylertech.com/search.aspx>) for information regarding state-specific updates and all other changes not covered in this document.

Accounts Receivable Version 10.3

The following changes apply to Munis Accounts Receivable programs.

Accounts Receivable Settings, Customers

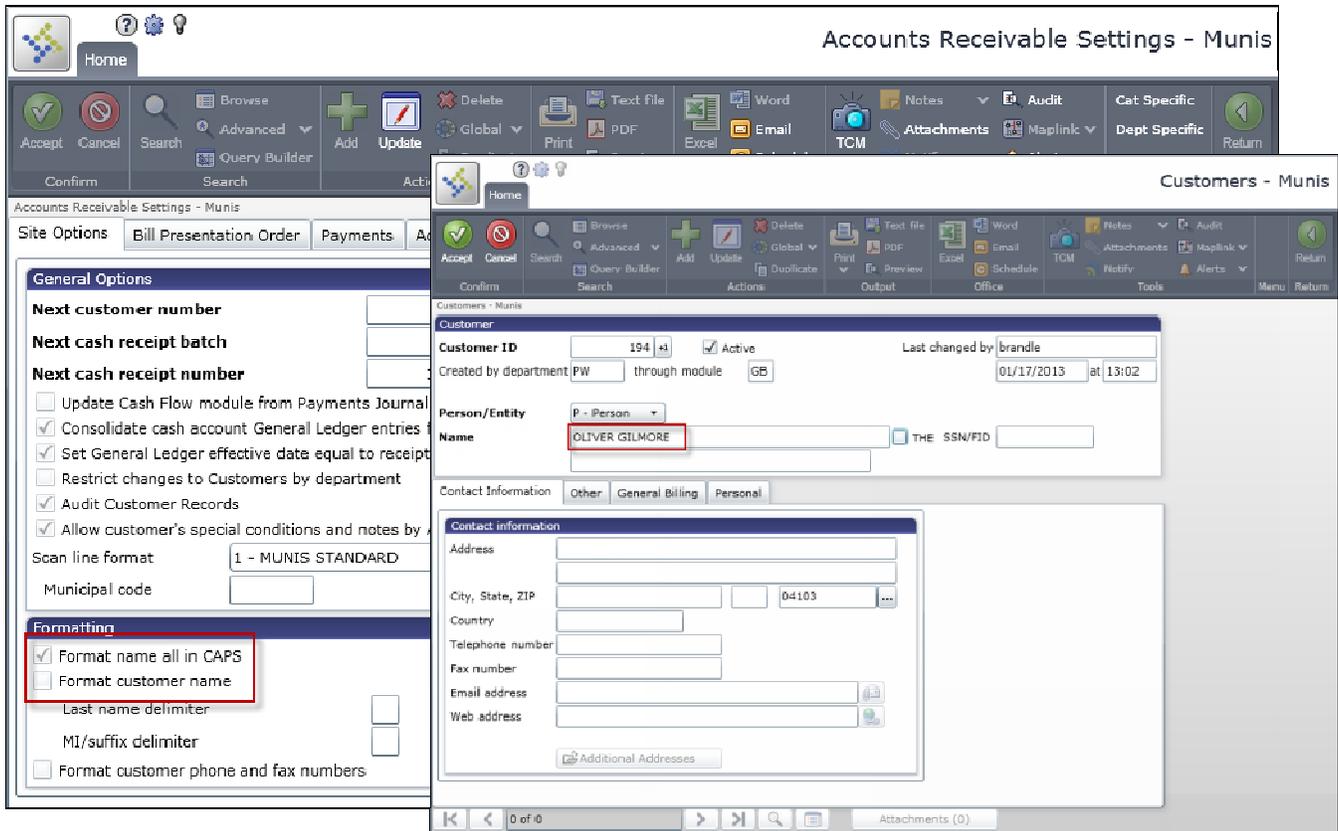
The Format Name in All Caps check box displays above the Format Customer Name check box in the Formatting section on the Site Options tab. The Format Customer Name check box does not need to be selected along with the Format Name in All Caps check box in order for Customers to format the name in all uppercase characters.



The screenshot shows the 'Accounts Receivable Settings - Munis' interface. The 'Site Options' tab is selected, and the 'Accounting Options' sub-tab is active. The 'General Options' section contains several input fields and checkboxes. The 'Formatting' section is highlighted with a red box and contains the following items:

- Format name all in CAPS
- Format customer name
- Last name delimiter: ,
- MI/suffix delimiter: .
- Format customer phone and fax numbers

The Customers program no longer formats the customer name as last name, first name when the Format Customer Name check box is cleared.



The IVR (Interactive Voice Response) group is available on the Other Options tab in Accounts Receivable Settings. Within the IVR group, you can enter the clerk name for payments, identify a Special Condition Code for warning against cash only payments, indicate the number of days prior to exceeding a past due date threshold, and indicate the times for the day's batch payments. Payments are processed in “real time” through the use of web services. Other settings are established through third-party vendors such as Presidio™ and Selectron Technologies.

Accounts Receivable Settings - Munis

Accounts Receivable Settings - Munis

Site Options | Bill Presentation Order | Payments | Accounting Options | Refunds | Reversals | Other Options

Prepayments

Automatically calculate interest expense after days at an interest rate of

Refunds

Automatically calculate interest expense after days

Override interest expense rate

Special Conditions

Special condition default duration period of months

Web Payments

Send e-mail confirmation for web payments

IVR

Payments clerk

Flag with payment warning (cash only) special condition

Days past due to exceed threshold

new batch times for day's payments:

Time 1 (format examples "15:30", "08:00")

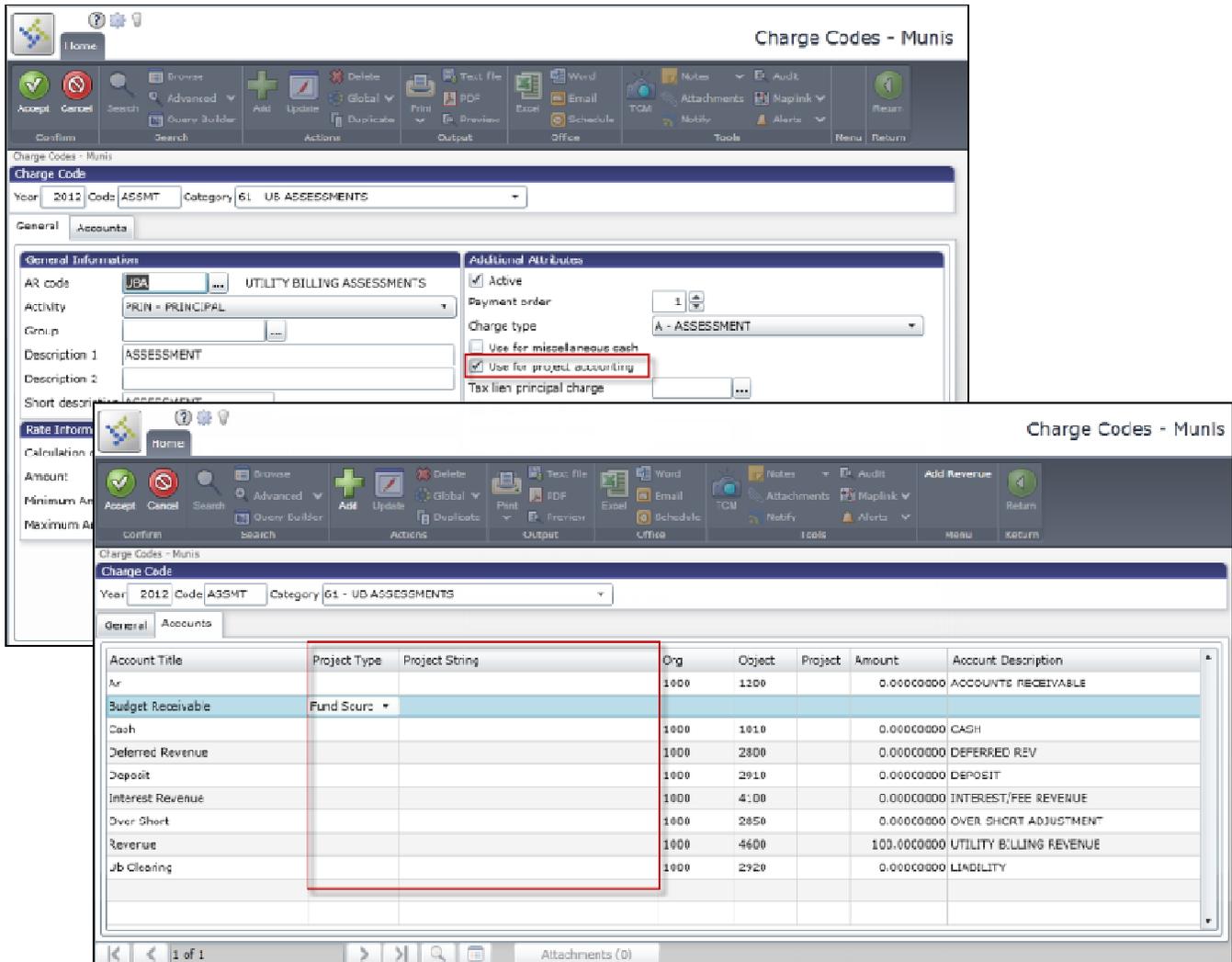
Time 2

Time 3

Time 4

Charge Codes

The Use for Project Accounting check box is available on the General tab for Utility Billing charge codes, allowing the Project Type and Project String fields to be accessible on the Accounts tab.



Charge Codes - Munis

Year: 2012 Code: ASSMT Category: 61 - UB ASSESSMENTS

General Accounts

General Information

AR code: JBA UTILITY BILLING ASSESSMENTS

Activity: PRIN - PRINCIPAL

Group: [Empty]

Description 1: ASSESSMENT

Description 2: [Empty]

Short description: [Empty]

Additional Attributes

Active

Payment order: 1

Charge type: A - ASSESSMENT

Use for miscellaneous cash

Use for project accounting

Tax lien principal charge: [Empty]

Charge Codes - Munis

Year: 2012 Code: ASSMT Category: 61 - UB ASSESSMENTS

General Accounts

Account Title	Project Type	Project String	Org	Object	Project	Amount	Account Description
Ar			1000	1200		0.00000000	ACCOUNTS RECEIVABLE
Budget Receivable	Fund Source						
Cash			1000	1010		0.00000000	CASH
Deferred Revenue			1000	2800		0.00000000	DEFERRED REV
Deposit			1000	2910		0.00000000	DEPOSIT
Interest Revenue			1000	4100		0.00000000	INTEREST/FEE REVENUE
Over Short			1000	2850		0.00000000	OVER SHORT ADJUSTMENT
Revenue			1000	4600		100.00000000	UTILITY BILLING REVENUE
Liability			1000	2920		0.00000000	LIABILITY

Process Lockbox File

The Refund Options group provides actions for refunding amounts that are overpaid through the lockbox import process. The group includes the following:

- The Refund Overpayments check box, which transfers the overpayment to Bill Refund Processing for the exact amount that is overpaid.
- The Refund Reason Code box, where you select the reason code for the overpayment that displays on the Bill Refund Processing screen.
- The Refund Overpayments To list, where you select the Customer or the Lender.

Process Lockbox Files - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Print Preview Text file PDF Excel Word Email Schedule TCM Attachments Notify Alerts File Preview Process NACHA Settings Return

Process Lockbox Files - Munis

Scheduling
Execute this report

Lockbox parameters

Entry date
Clerk
Department
Batch number
Deposit
Interest eff date
GL effective date
Year/period
 Override cash account
 Accept only exact payments on tax bills
 File format
 Personal property payment match by parcel ID
 Pay current collection year only on tax bills
 Lockbox co. name
 Import path
 Payment method override

Refund Options
 Refund overpayments
 Refund reason code
 Refund overpayments to

Lockbox filters
AR code

Processing summary
 Payments processed
 Error count

Transfer of Overpayments

The Only Bills of the Same Year check box is available on the Mass Add Transfer Record screen, allowing you to transfer an overpayment to bills within the same calendar year as the Transfer From bill.

Transfer of Overpayments - Munis

Customer account information

Add Transfer Record

Transfer from

AR Cat: 20
Year: 2011
Bill: 3

Transfer to

Bill: [dropdown]
Cat/Year/Bill: 20 / 2011 / 4

Parcel: [empty]
Property code: [empty]
Customer number: [empty]

AR Cat: 1 to 63
Bill: 0 to 999999

Reason: TRS - TRANS CODE
Effective Date: Last payment date 01/11/20
Amount: 44.52

Customer account information

SMITH, BILL
100 MIDDLE ST
MUNIS, US 12345
207-782-2250

Type	Category	Year	Bill	Amount
FROM	20	2011	3	44.52
TO	20	2011	4	44.52

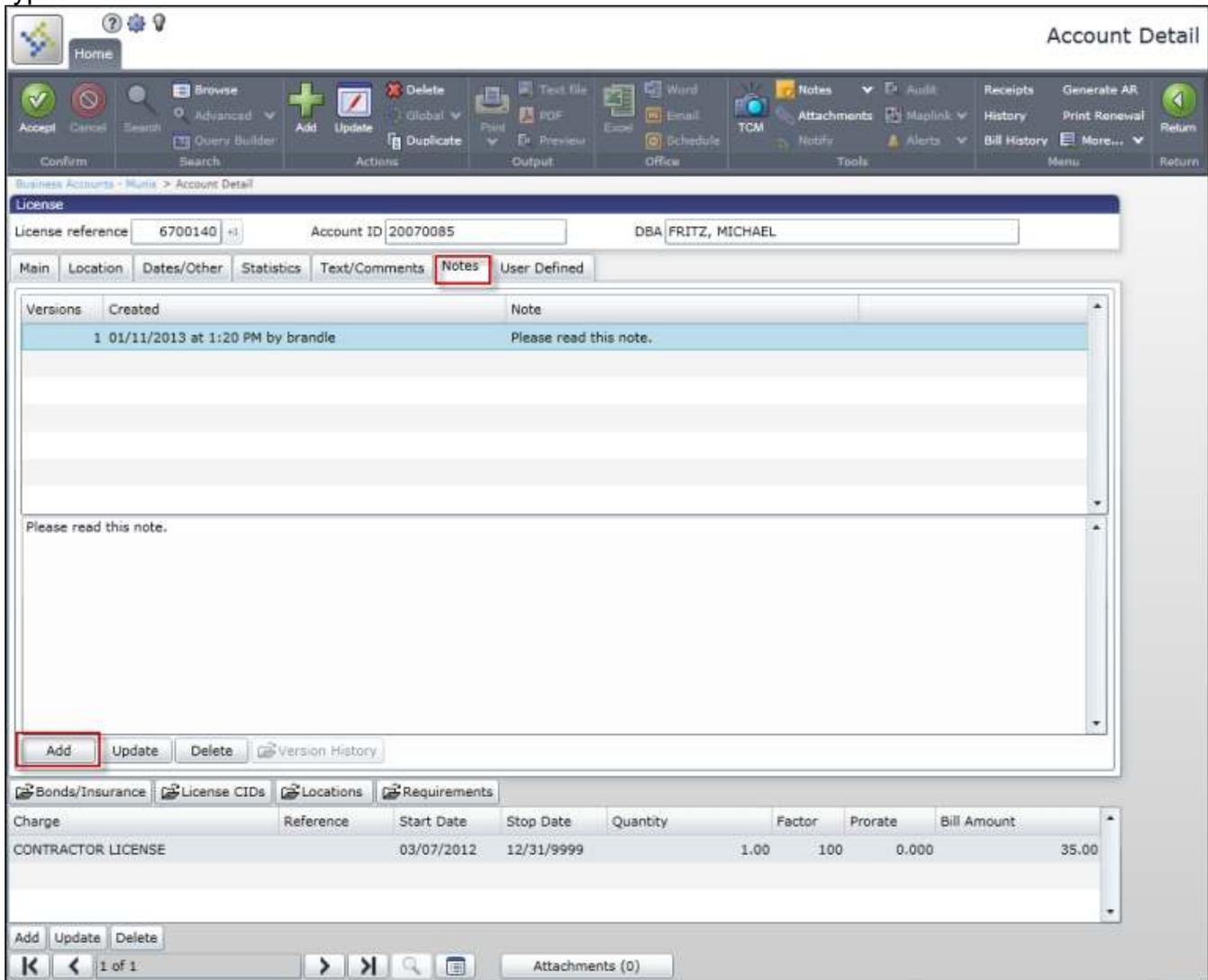
1 transfer record(s) exist for bundle

Business Licenses Version 10.3

The following changes apply to Munis Business Licenses programs.

Business Accounts

The Notes tab on the Account Detail screen of Business Accounts provides unlimited notes that include version history and license user-defined fields that are customizable by business type.



Account Detail

License reference: 6700140 Account ID: 20070085 DBA: FRITZ, MICHAEL

Notes tab selected.

Versions	Created	Note
1	01/11/2013 at 1:20 PM by brandle	Please read this note.

Buttons: Add, Update, Delete, Version History

Charge	Reference	Start Date	Stop Date	Quantity	Factor	Prorate	Bill Amount
CONTRACTOR LICENSE		03/07/2012	12/31/9999		1.00	100	0.000 35.00

Business Accounts, Business License Settings

Override Delivery Method options are available for business licenses, license renewals, and bills in Business Accounts and Business License Settings, allowing you to indicate if licenses,

renewals, or bills are to be sent by email or fax, or if the licenses, renewals, or bills are to be printed using a Munis form.

Business Accounts

The Other tab contains the Override License/Tax Delivery Methods check box that specifies the override delivery methods at the Business Account level. In the Form Delivery Method group on the Other tab, the Renewals, Licenses, and Bills check boxes allow you to specify if the licenses or taxes are sent by Email, Fax, or Print options.

The screenshot shows the 'Business Accounts - Munis' interface. The 'Other' tab is selected, and the 'Override license/tax delivery methods' checkbox is checked. Below this, the 'Form delivery method' section is expanded, showing three categories: Email, Fax, and Print. Each category has three checkboxes: Renewals, Licenses, and Bills. The 'Other' tab is highlighted with a red box, and the 'Form delivery method' section is also highlighted with a red box.

On the Taxes (Account Taxes) screen, the Form Delivery check boxes for Renewals and Bills are available for Email, Fax, and Print records on the Main tab.

Account Taxes

Home

Accept Cancel Search Advanced Query Builder Confirm Search

Add Update Duplicate Actions

Text file PDF Preview Output

Word Email Schedule Office

Notes Attachments TCM Notify Alerts Tools

Audit Mailink

Receipts Generate AR History Print Returns Bill History View Calc Menu Return

Business Accounts - Munis > Account Taxes

Tax

Reference 6700147 Account ID 20070085 DBA FRITZ, MICHAEL

Main User Defined

Category TAXC TAX CODE

Cycle code A ANNUAL

Status ACTIVE UNFILED

Allow processing of exempt tax

Inactivated 15

Last bill date 04/16/2012 15

Tax group

Mail to AGENT/OPERATOR

Bill to AGENT/OPERATOR

Discount allowed

Print forms

Print forms/delinquent notices

Additional forms requested

Form delivery method

Email

Renewals

Bills

Fax

Renewals

Bills

Print

Renewals

Bills

Charge	Reference	Start Date	Stop Date	Quantity	Factor	Prorate	Bill Amount
BUSINESS LICENSE		11/06/2012	12/31/9999	85.00	100	0.000	25.00
SALES TAX		11/06/2012	12/31/9999	.00	100	0.000	.00

Add Update Delete

K 2 of 2 Attachments (0)

On the Licenses (Account Detail) screen, the Form Delivery Method check boxes for Renewals, Licenses, and Bills are available for Email, Fax, and Print records on the Dates/Other tab.

Account Detail

Business Accounts - Munis > Account Detail

License reference: 6700140 Account ID: 20070085 DBA: FRITZ, MICHAEL

Main Location **Dates/Other** Statistics Text/Comments Notes User Defined

Dates	
Application date	03/01/2012
Issue date	03/01/2012
Expire date	03/01/2014
Last bill date	02/02/2012

Form delivery method	
Email	<input checked="" type="checkbox"/> Renewals
	<input checked="" type="checkbox"/> Licenses
	<input checked="" type="checkbox"/> Bills
Fax	<input type="checkbox"/> Renewals
	<input type="checkbox"/> Licenses
	<input type="checkbox"/> Bills
Print	<input checked="" type="checkbox"/> Renewals
	<input checked="" type="checkbox"/> Licenses
	<input checked="" type="checkbox"/> Bills

Bonds/Insurance License CIDs Locations Requirements

Charge	Reference	Start Date	Stop Date	Quantity	Factor	Prorate	Bill Amount
CONTRACTOR LICENSE		03/07/2012	12/31/9999		1.00	100	35.00

Add Update Delete

1 of 1 Attachments (0)

Business License Settings:

The Send Bills to Printer and Override License Bill Delivery Method check boxes are available in the Additional Settings group on the Main tab of Business License Settings, allowing you to override the Email, Fax, and Print check boxes for Bills on the Account level.

Business License Settings - Munis

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Notes Audit Installments Requirements Return

Confirm Search Query Builder Search Actions Duplicate Output Preview Office Schedule Notify Alerts Tools Menu Return

Business License Settings - Munis

Bill year 2012

Main Default Codes Additional Defaults Tax Auditing EFT Self Service User-Defined Labels

Settings

Next ID no	20079091	AK code	BL - BUS. LIC
Next detail ref no	6708150	Discount percent	.000
Next license issue no	408014	Current cycle	1
Next bill no	108256	Process receipts	Warn-only
Next adj ref no	208812	Unpaid balance check	All BL Bills
Next C of O	1001	Unpaid threshold	0.00
Validate parcel ID	Central property	License output type	XML Export
Validate personal property	No validation	Bill output type	XML Export
Interest method	01 - DAILY INTEREST	Filing history limit	0
Max Aggr Int Rt	.00		

Additional settings

<input checked="" type="checkbox"/> Update G/L	<input checked="" type="checkbox"/> Auto-display account in Receipts Entry
<input type="checkbox"/> F/M audit comment required	<input checked="" type="checkbox"/> Collect payments in Receipts Entry
<input checked="" type="checkbox"/> Process tax	<input checked="" type="checkbox"/> Default payment amount in Receipts Entry
<input checked="" type="checkbox"/> Maintain NAICS at the business level	<input type="checkbox"/> Use extended scan line in Receipts Entry
<input checked="" type="checkbox"/> DBA name required in Account Master	<input type="checkbox"/> Reason code required for license print override
<input checked="" type="checkbox"/> SSN/FID required in Account Master	<input checked="" type="checkbox"/> Comment required for license print override
<input checked="" type="checkbox"/> Show contact phone in Business Account inquiry	<input type="checkbox"/> Prevent inactivation of license/tax with unpaid balance
<input checked="" type="checkbox"/> Calculate charges for exempt license/tax	Single renewal print method
<input checked="" type="checkbox"/> Send bills to printer	Minimum entry screen
<input checked="" type="checkbox"/> Override license bill delivery method	Print licenses with unperformed inspections
	Yes
	Receipts Entry penalty calculation method
	Daily
	Receipts Entry late payment penalty basis
	Net total plus late filing penalty
	Void bills with payments
	Warn

Business License Settings

The License Date Options group on the Additional Defaults tab in Business License Settings, includes the Account Last License Date and License Issue Date lists, which include the following options:

- Account Last License Date
 - Update With the Date of the Most Recent Bill
 - Update With the Date of the Most Recent License Print
- License Issue Date
 - Set Once to the Date the License was Originally Issued
 - Update With the Date of the Most Recent License Print

Business License Settings - Munis

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Email Schedule TCM Notes Attachments Maplink Alerts Installments Requirements Return

Confirm Search Query Builder Actions Output Office Tools Menu Return

Business License Settings - Munis

Bill year 2012

Main Default Codes Additional Defaults Tax Auditing EFT Self Service User-Defined Labels

License creation

Mail to AGENT/OPERATOR

Bill to AGENT/OPERATOR

Default as 'General contractor'

Allow discounts

Print renewals

Print renewals/delinquent notices

Additional forms requested

License date options

Account last license date Update with the date of the most recent bill

License issue date Set once to the date the license was originally issued

Tax creation

Mail to AGENT/OPERATOR

Bill to AGENT/OPERATOR

Allow discounts

Special conditions

'Stop Penalty' special condition NOPFN - NO PENALTY

'Stop Issuance' special condition

Phase-in

Automatically adjust bill for phase-in credits

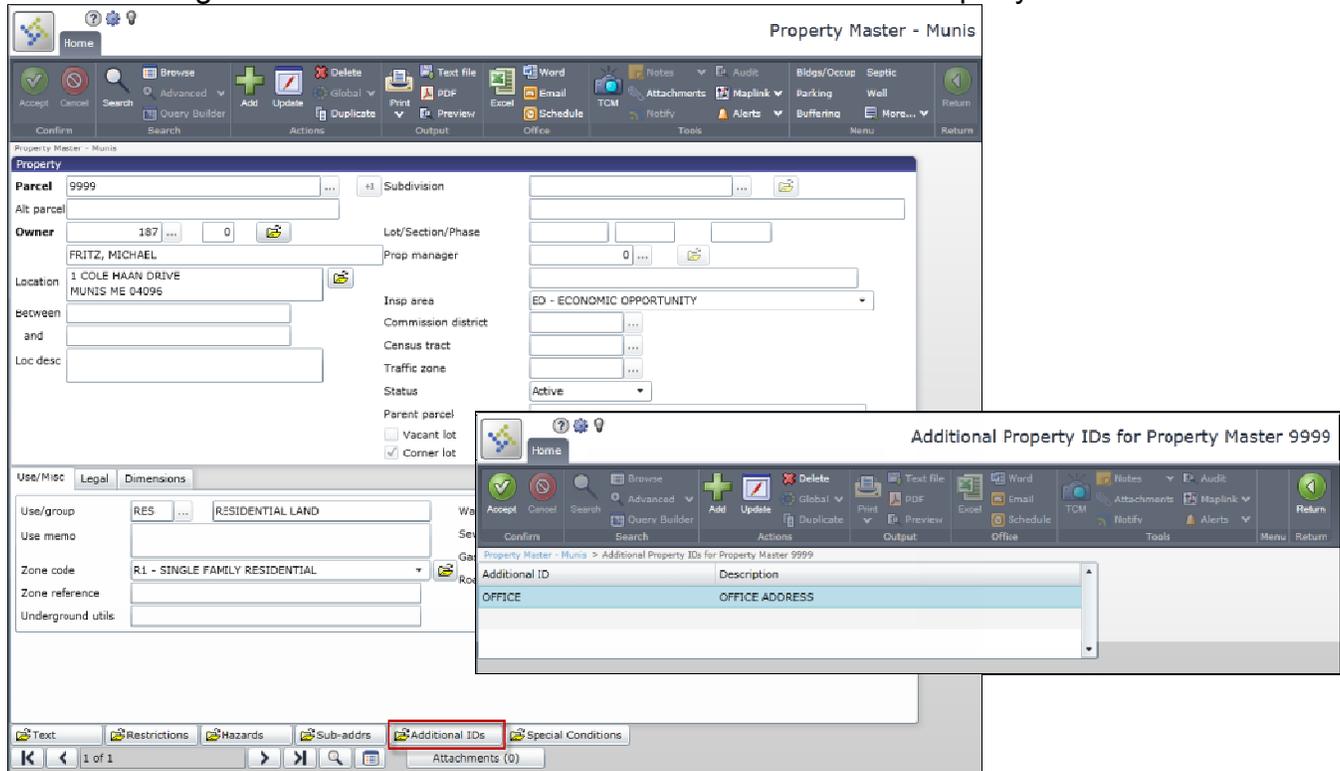
Adjustment reason

Central Property Version 10.3

The following changes apply to Munis Central Property programs.

Property Master

The Property Master program allows searches for multiple parcel IDs belonging to the same property through the Additional ID field on the Property Find screen. The Additional ID is created through the Additional IDs button on the main screen of Property Master.



The General Billing Invoice Inquiry button is available in the Other Modules screen of Property Master, providing access to the invoice record in Invoice Inquiry.

Property Master - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Search Add Update Duplicate Actions Print PDF Preview Output Text file Word Email Schedule Office Notes Attachments Notify Tools Audit Maplink Alerts Menu Return

Property Master - Munis > Other Modules

Property

Parcel 9999 Subdivision
 Alt parcel
 Owner 187 0 Lot/Section/Phase
 FRITZ, MICHAEL Prop manager
 Location 1 COLE HAAN DRIVE MUNIS ME 04096
 Between and Loc desc
 Insp area
 Commission district
 Census tract
 Traffic zone
 Status
 Parent parcel
 Vacant lot Res
 Corner lot Gov

Other Modules

Module

- Tax Master Parcel Inquiry
- Utility Billing Acct Inquiry
- General Billing Invoice Inquiry**
- Business Master Browse
- Animal License Browse
- Work Orders Browse
- Vehicle Stickers Browse
- Synchronize Property
- Exit

Use/Misc Legal Dimensions

Use/group RES RESIDENTIAL LAND Water type G
 Use memo Sewer type CITY - CITY
 Zone code R1 - SINGLE FAMILY RESIDENTIAL Gas type GAS - GAS
 Zone reference Road type PAVE - PAVED
 Underground utils

Text Restrictions Hazards Sub-adrs Additional IDs Special Conditions

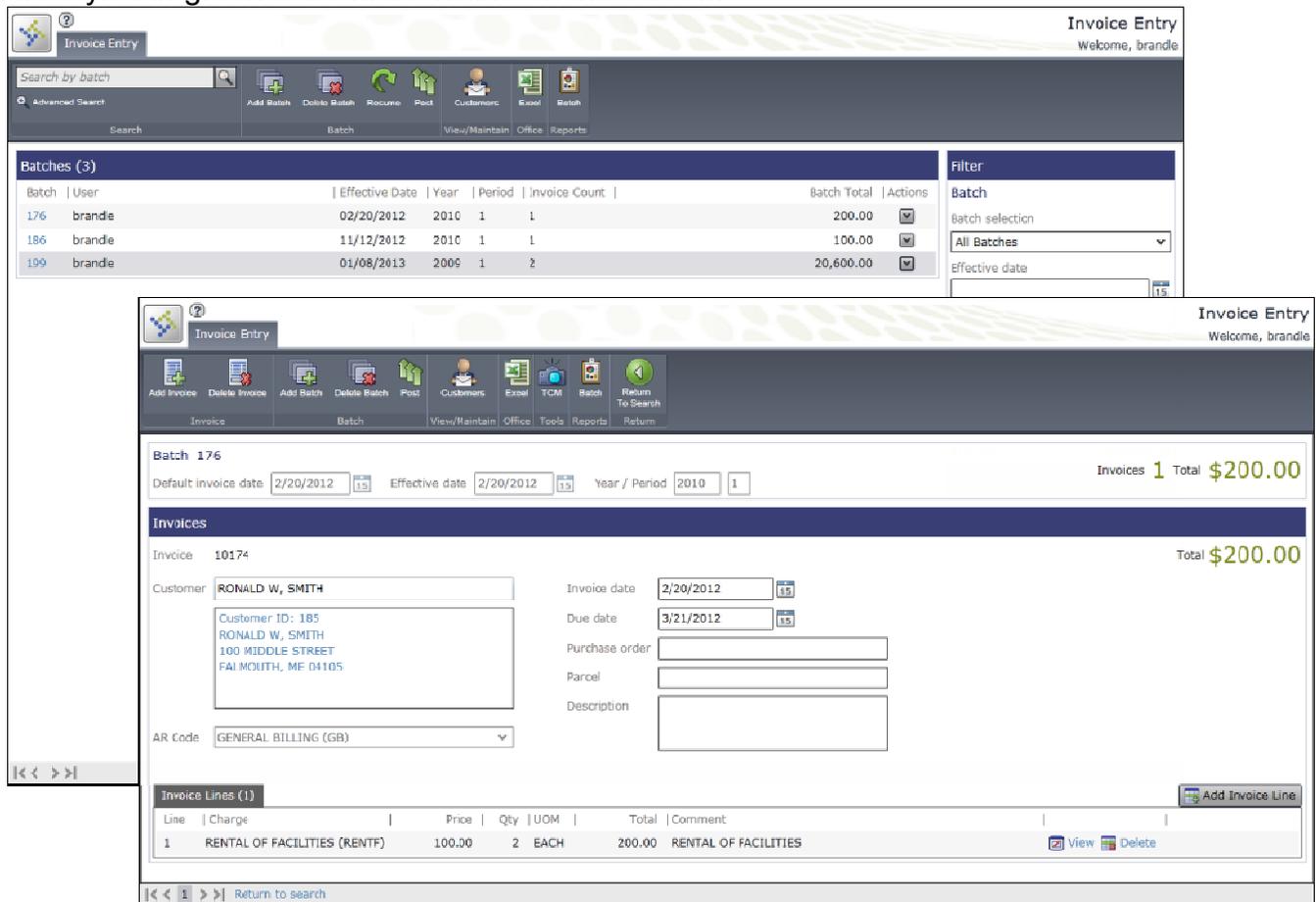
1 of 1 Attachments (0)

General Billing Enhancements Version 10.3

The following changes apply to Munis General Billing programs.

Invoice Entry

Invoice Entry has been updated to improve usability. For example, the screen display is reorganized to present invoice information more clearly and the ribbon provides direct access to Tyler Content Manager. Other examples include the Customer Name and Address box, which has been moved below the Customer field box and the invoice count and total, which are styled in green to be more visible on the screen.



The screenshot displays the 'Invoice Entry' application interface. The top section shows a ribbon with various actions like 'Add Invoice', 'Delete Invoice', 'Add Batch', 'Delete Batch', 'Post', 'Customer', 'Email', 'TCM', 'Batch', and 'Return To Search'. Below the ribbon, there is a search bar and a table of batches.

Batch	User	Effective Date	Year	Period	Invoice Count	Batch Total	Actions
176	brande	02/20/2012	2010	1	1	200.00	[icon]
186	brande	11/12/2012	2010	1	1	100.00	[icon]
199	brande	01/08/2013	2009	1	2	20,600.00	[icon]

The detailed view for 'Batch 176' shows the following information:

- Default invoice date: 2/20/2012
- Effective date: 2/20/2012
- Year / Period: 2010 / 1
- Invoices: 1 Total: \$200.00

The 'Invoices' section shows:

- Invoice: 10174 Total: \$200.00
- Customer: RONALD W, SMITH
- Customer ID: 185
- Customer Address: RONALD W, SMITH, 100 MIDDLE STREET, FAI MOUTH, ME 04105
- Invoice date: 2/20/2012
- Due date: 3/21/2012
- AR Code: GENERAL BILLING (GB)

The 'Invoice Lines' table is as follows:

Line	Charge	Price	Qty	UOM	Total	Comment	View	Delete
1	RENTAL OF FACILITIES (RENTF)	100.00	2	EACH	200.00	RENTAL OF FACILITIES	[icon]	[icon]

Invoice Entry and Proof

The program creates invoices with positive and negative invoice lines within the same invoice on the Proof Detail screen.

Proof Detail

Invoice Entry and Proof - Munis > Proof Header > Proof Detail

Invoice header

Year 2011 Invoice 10203 Total invoice 100.00

Customer 187 FRITZ, MICHAEL

Invoice detail

Line 1

Charge code SERVIC - BILLABLE SERVICES BILLABLE SERVICES

Quantity 8.00 UOM EACH

Price 100.000000

Discount amount .00

Bill amount 800.00

Recipient 0

Org	Obj	Proj	Description
1000	4200		GENERAL BILLING REVENUE

Totals

Total allocation 800.00

1 of 3

Proof Detail

Invoice Entry and Proof - Munis > Proof Header > Proof Detail

Invoice header

Year 2011 Invoice 10203 Total invoice 100.00

Customer 187 FRITZ, MICHAEL

Invoice detail

Line 2

Charge code SERVIC - BILLABLE SERVICES BILLABLE SERVICES

Quantity 8.00 UOM EACH

Price -100.000000

Discount amount .00

Bill amount -800.00

Recipient 0

Org	Obj	Proj	Description	Total Amount
1000	4200		GENERAL BILLING REVENUE	-800.00

Totals

Total allocation -800.00

2 of 3

The Resubmit button is available for workflow processing in Invoice Entry and Proof. When an invoice approval is rejected, the Resubmit button can be used to resubmit the approval. When you click Resubmit, the status of the Workflow item returns to Pending.

Recurring Invoices - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Delete Global Print PDF Excel Word Email Schedule TCM Notes Attachments MapLink Alerts Tools Menu Return

Recurring Invoices - Munis

Recurring Invoice Invoice Detail Invoice History

Invoice header

Customer 187 FRITZ, MICHAEL

Address 0

Total invoice

AR code GB - GENERAL BILLING

Invoice prefix 241125 Project Accounting invoice

Contract

Contract amount 0.00 For/Loc

Billed amount 0.00

Customer PO

Discount code

Discount percent .00

Department

Cash account 1000 1010

Parcel 9999 Comments

Recurrence pattern

Search by recurrence

Weekly
 Monthly
 Yearly
 Custom

Weekly

Recur every week

Recurrence details

Start date 15 End date 15 Last date invoiced 15

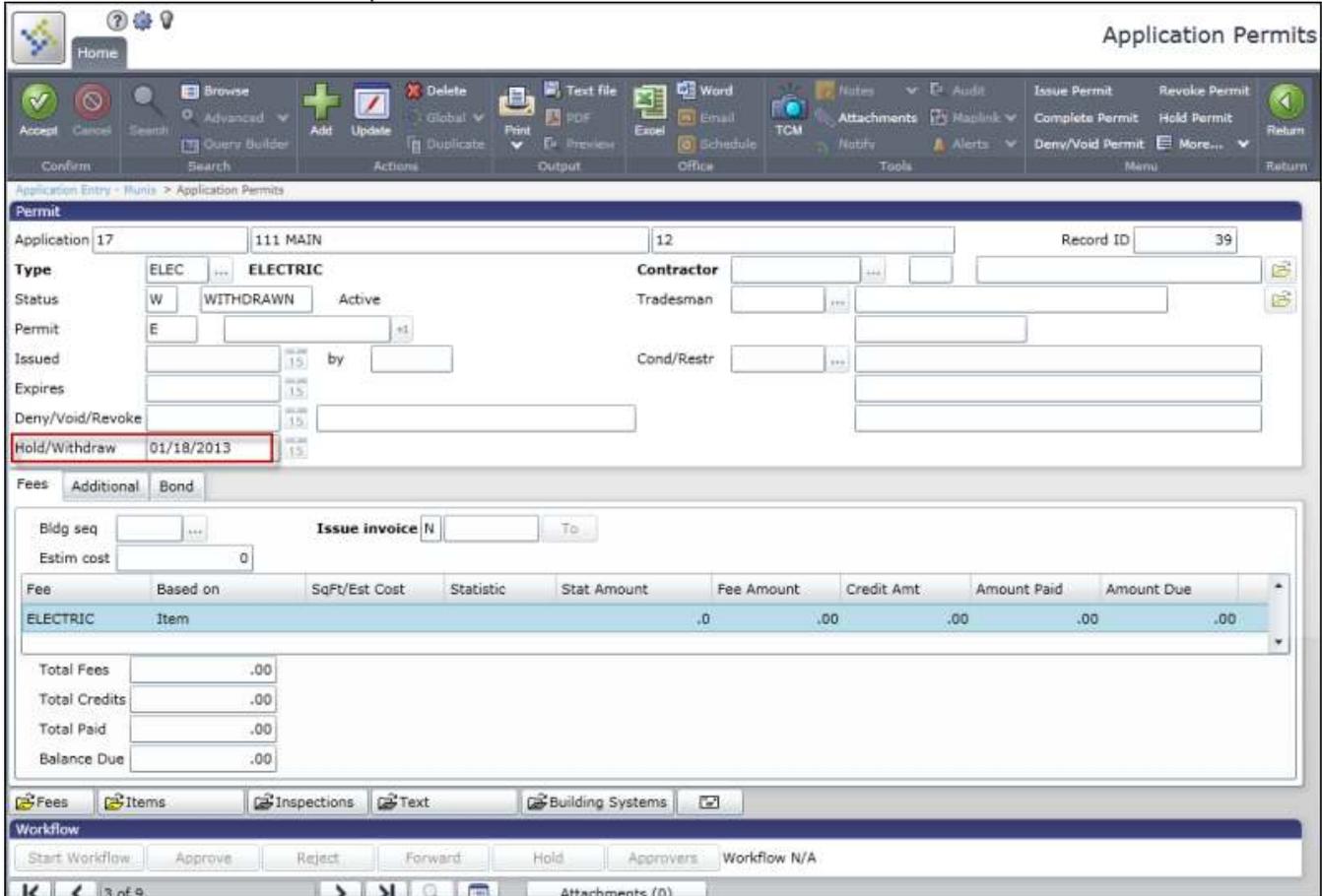
0 of 0 Attachments (0)

Permits and Code Enforcement Version 10.3

The following changes apply to Munis Permits and Code Enforcement programs.

Application Entry

When you click Hold Permit or Withdraw Permit on the Application Permits screen, the Hold/Withdraw date field specifies the date of the hold or withdrawal action.



The screenshot shows the 'Application Permits' interface. The 'Hold/Withdraw' date field is highlighted in red and contains the date '01/18/2013'. The form includes various fields for permit details, fees, and workflow actions.

Fee	Based on	SqFt/Est. Cost	Statistic	Stat Amount	Fee Amount	Credit Amt	Amount Paid	Amount Due
ELECTRIC	Item				.0	.00	.00	.00
Total Fees							.00	.00
Total Credits							.00	.00
Total Paid							.00	.00
Balance Due							.00	.00

The Revoke Permit button specifies the date the permit is revoked in the Deny/Void/Revoke date field. The status of the permit must be Issued in order to use the Revoke Permit feature.

Application Permits

Application Entry - Munis > Application Permits

Permit

Application 17 111 MAIN 12 Record ID 37

Type BLD1 ... BUILDING ESTIMATED COST Contractor 12 ... P B G CONSTRUCTION

Status K REVOKED Active

Permit B 20030472

Issued 02/16/2007 by MU

Expires 02/16/2008

Deny/Void/Revoke 01/18/2013

Hold/Withdraw

Fees Additional Bond

Bldg seq Issue invoice N To

Estim cost 0

Fee	Based on	SqFt/Est Cost	Statistic	Stat Amount	Fee Amount	Credit Amt	Amount Paid	Amount Due
BLDG EST	Estimated Cost				.0	15.00	.00	15.00

Total Fees 15.00

Total Credits .00

Total Paid .00

Balance Due 15.00

Workflow

Start Workflow Approve Reject Forward Hold Approvers Workflow N/A

The Hold status is available for the Status box on the main screen. When you click the Close/Deny button and set the Status to Hold, the program displays the message for unperformed inspections to be deleted and asks you to click Yes to continue.

Close/Deny Application

Application Entry - Munis > Close/Deny Application

Status

Status HOLD

Actual end 01/18/2013

Status code N - NEW Active

Status memo

Denial reason

Reason code

Reason for denial

Munis (piappent)

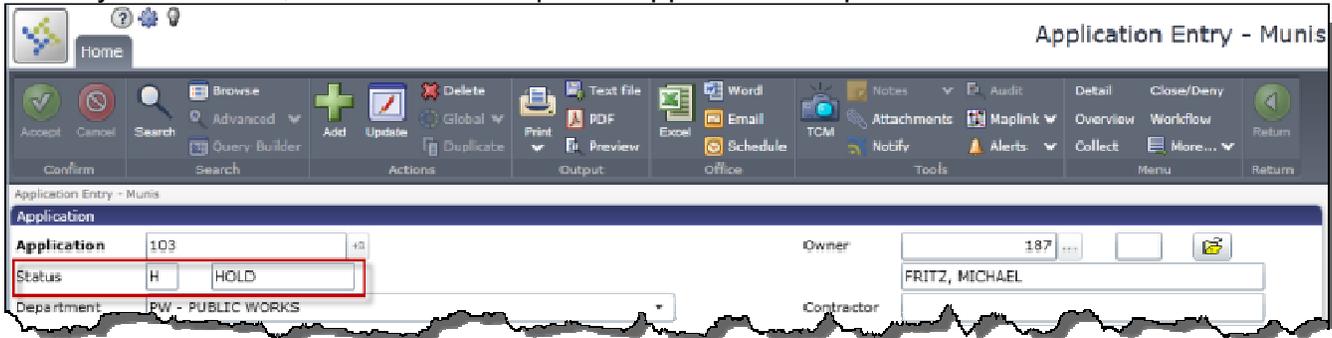
Unperformed required inspections will be deleted. Continue?

Yes No

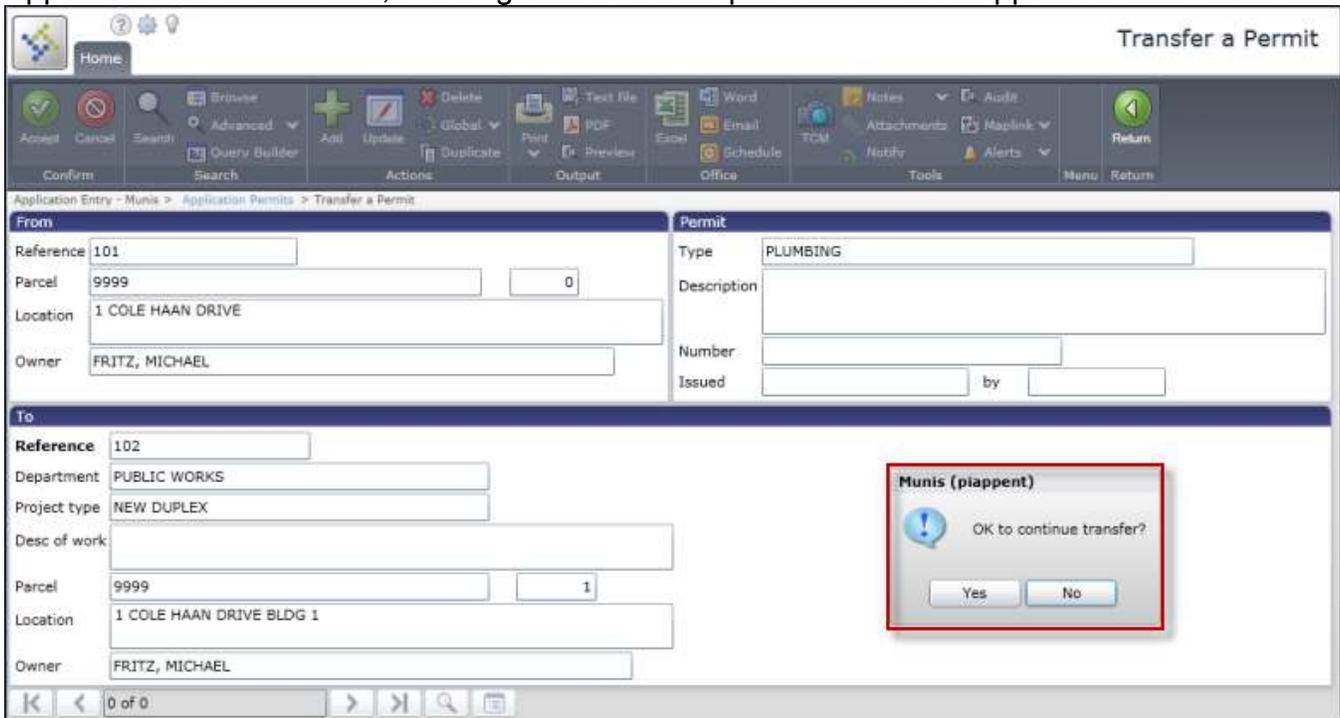
When you click Yes, the program displays a message asking to change the status of the application.



When you click Yes, the status of the permit application is updated to Hold.

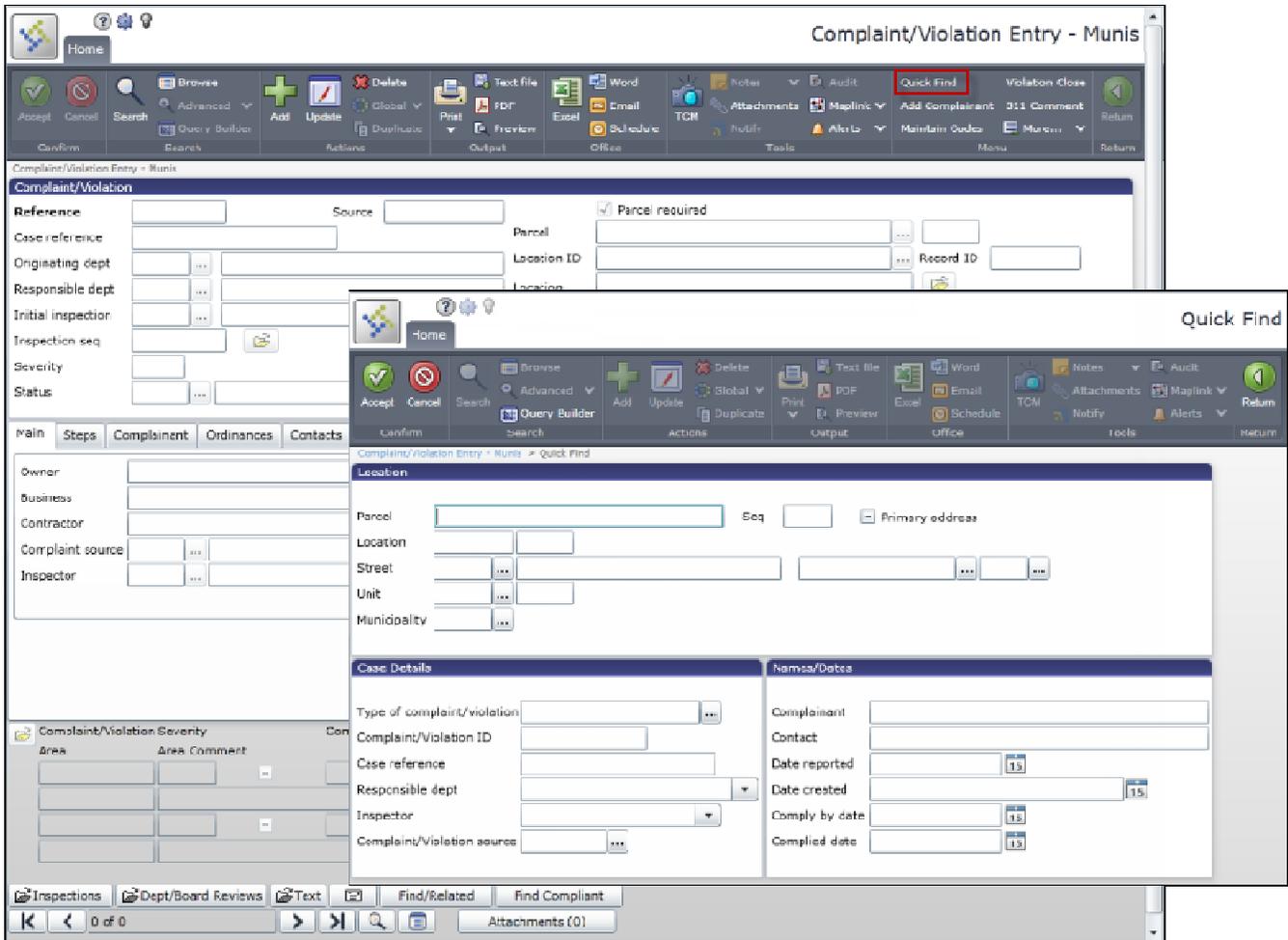


The Transfer a Permit screen is available when you click Transfer Permit through the Application Permits screen, allowing the transfer of permits from one application to another.



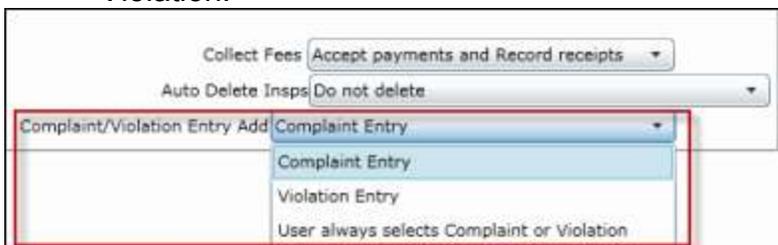
Complaint/Violation Entry

The Quick Find screen is available provides quick access to existing complaints.



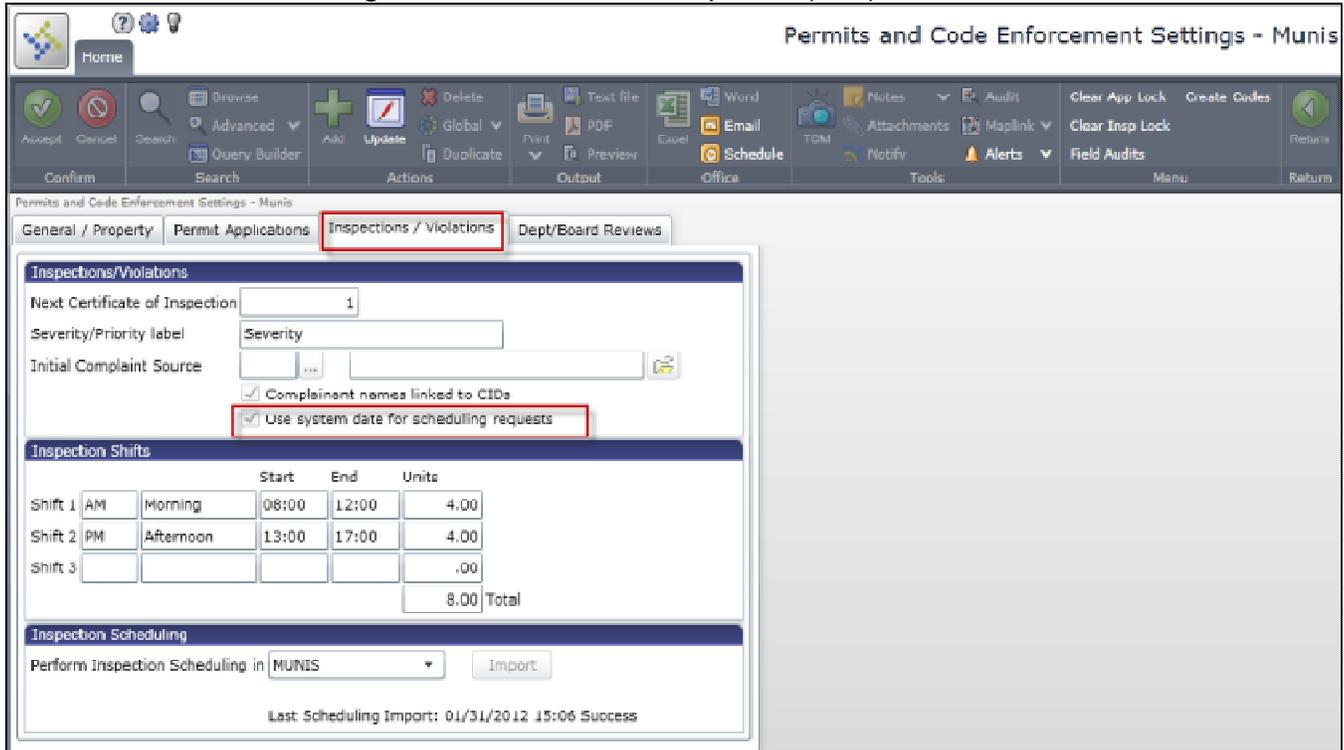
The Add screen allows you to enter complaints or violations, depending on your selected permissions on the Processing Role Permissions tab of Permits and Code Enforcement in Roles:

- If your Role setting is Complaint, the Add button opens the Enter a New Complaint screen.
- If your Role setting is Violations, the Add button opens the Enter a New Violation screen.
- If your Role permission is User Always Selects Complaint or violation, the Add button opens the Select Add Type screen, allowing you to choose between Complaint or Violation.



Permit and Code Enforcement Settings

The Use System Date for Scheduling Requests check box in the Inspections/Violations group on the Inspections/Violations tab provides a system date stamp for inspections that are scheduled online or through Interactive Voice Response (IVR).



Permits and Code Enforcement Settings - Munis

Home

Accept Cancel Search Advanced Query Builder Confirm Search

Actions: Add Update Global Duplicate Print PDF Preview Output

Office: Word Email Schedule

Tools: Notes Attachments Maplink Notify Alerts

Menu: Clear App Lock Create Codes Clear Insp Lock Field Audits

Return

Permits and Code Enforcement Settings - Munis

General / Property **Permit Applications** **Inspections / Violations** Dept/Board Reviews

Inspections/Violations

Next Certificate of Inspection: 1

Severity/Priority label: Severity

Initial Complaint Source: [] ... []

Compliment names linked to CIDs

Use system date for scheduling requests

Inspection Shifts

		Start	End	Units	
Shift 1	AM	Morning	08:00	12:00	4.00
Shift 2	PM	Afternoon	13:00	17:00	4.00
Shift 3					.00
					8.00 Total

Inspection Scheduling

Perform Inspection Scheduling in: MUNIS [v] [Import]

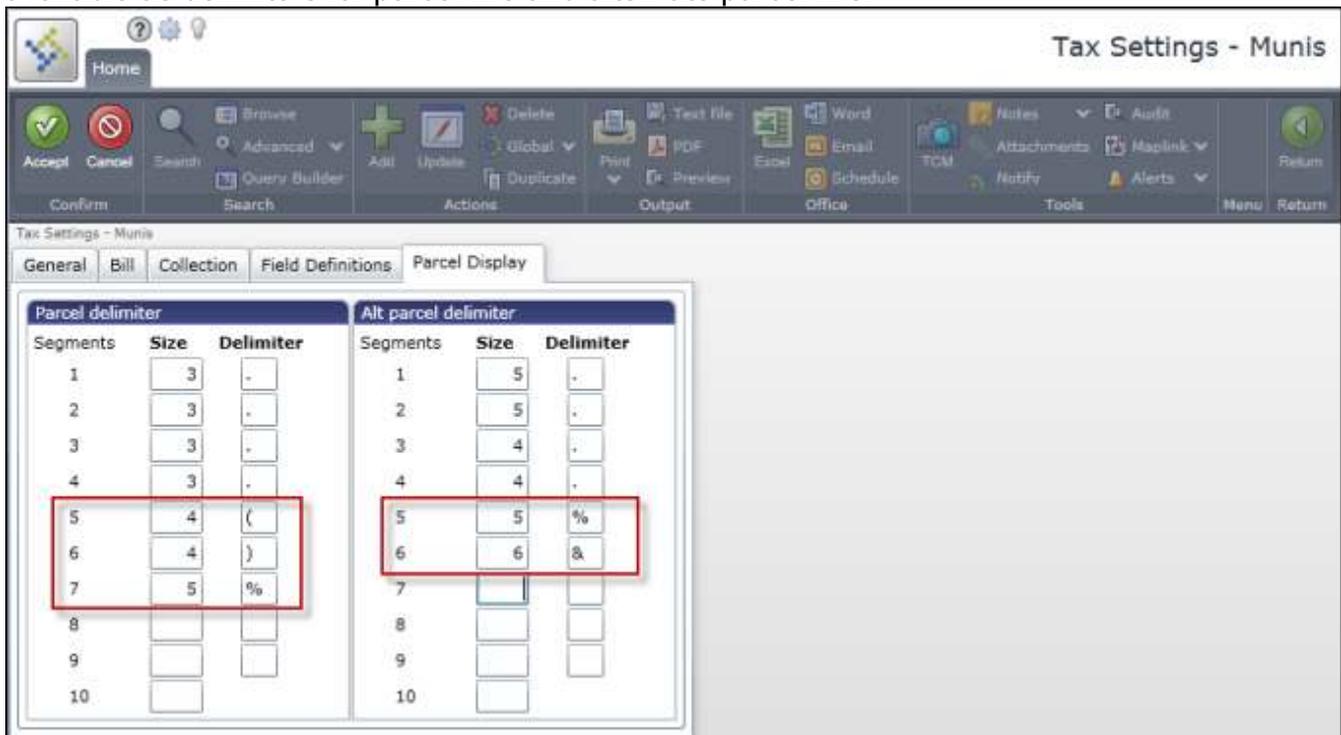
Last Scheduling Import: 01/31/2012 15:06 Success

Tax Version 10.3

The following changes apply to Munis Tax programs.

Tax Settings

Parcel Delimiter restrictions are no longer used for masking parcel IDs and alternate parcel IDs on the Parcel Display tab. This change allows any characters, including parentheses, to be available as delimiters for parcel IDs and alternate parcel IDs.

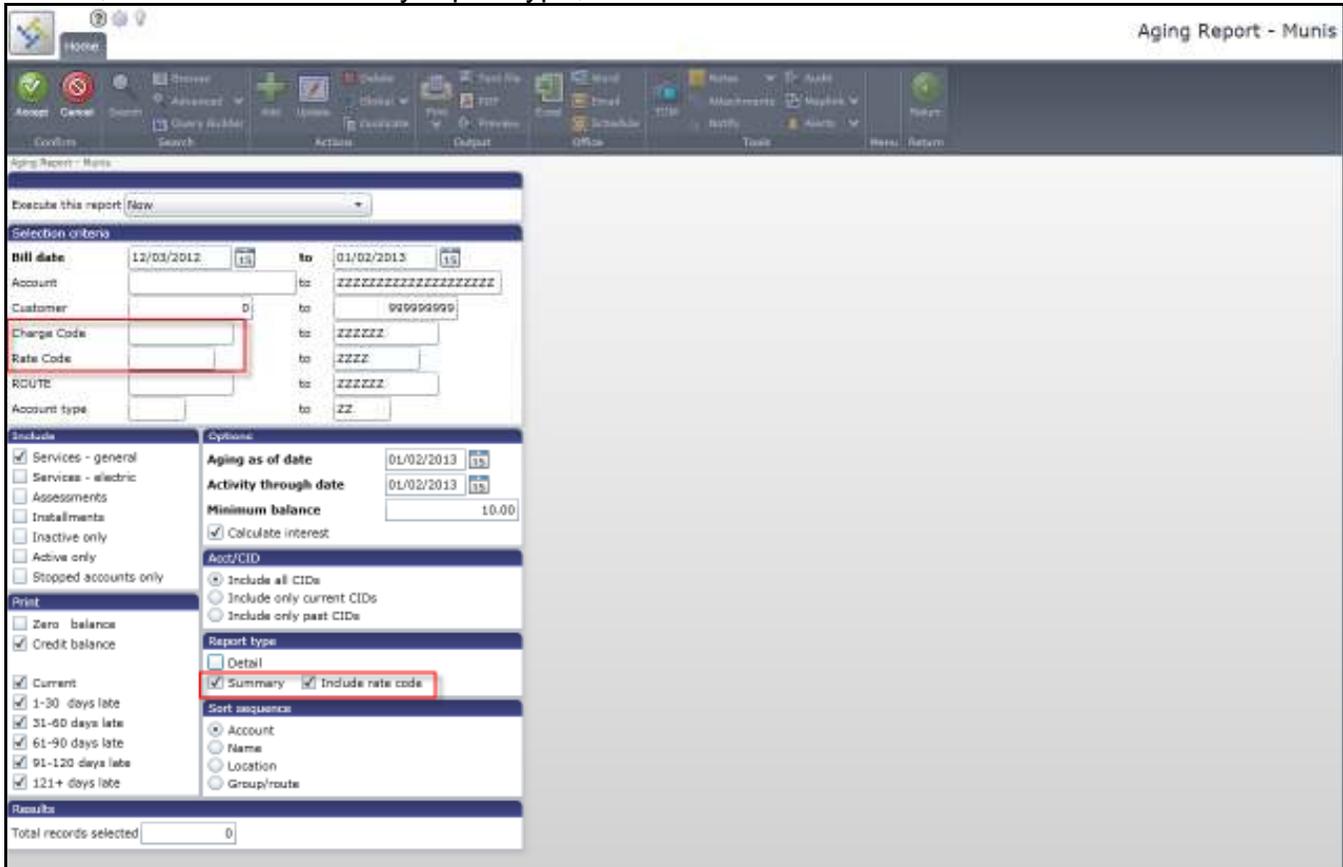


Utility Billing – CIS Version 10.3

The following changes apply to Munis Utility Billing – CIS programs.

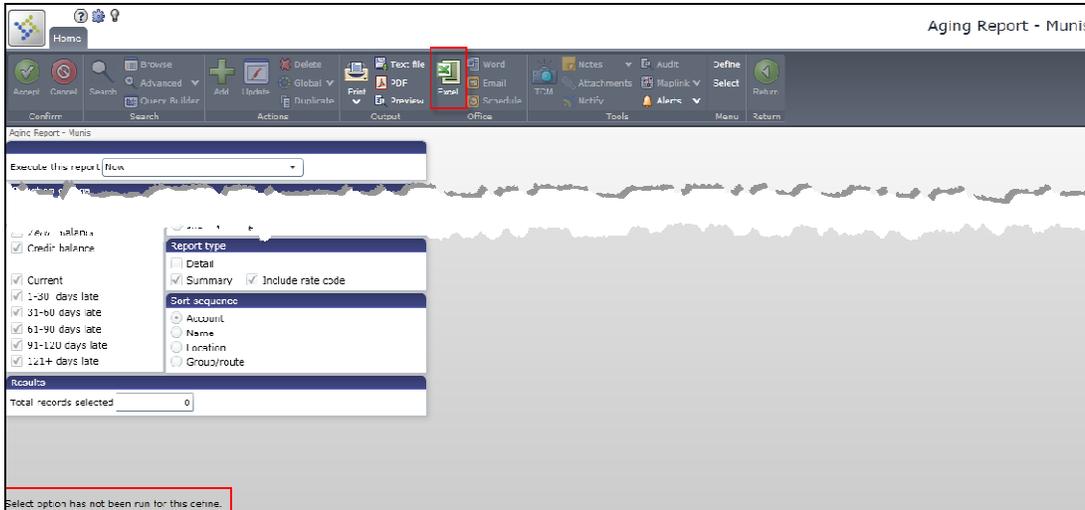
Aging Report

The Aging Report program includes the Charge Code and Rate Code boxes as selection criteria, and for the Summary report type, the Include Rate Code check box is available.



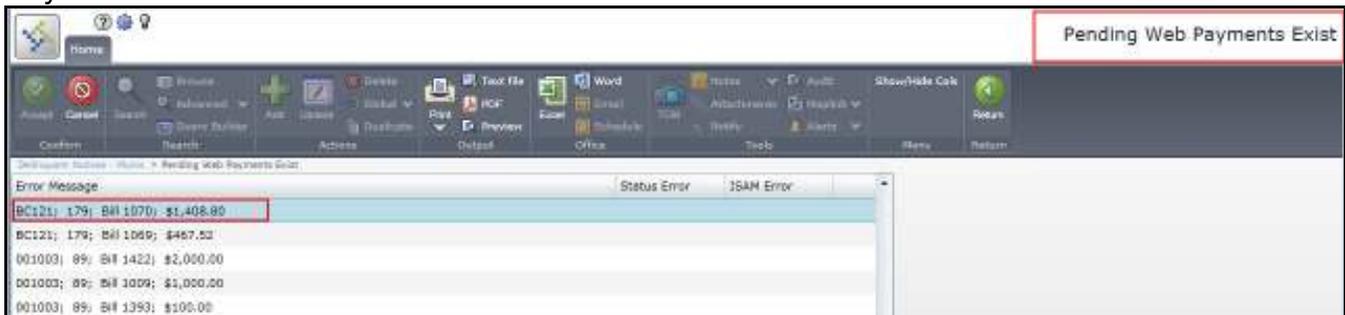
When the Include Rate Code check box is selected, the Summary Report groups selected data by service type, charge code, and rate code instead of simply by service type and charge code. The report includes the rate code and rate code description.

When the value of the Report Type list is Summary, the Excel option that allows you to export the data to Microsoft Excel is available after the Select process is complete. If you click Excel before completing the Select process, the program displays an error message in the lower-left corner of the screen.



Apply Late Fees, Cutoff Process, Delinquent Notices

When you process records within the Apply Late Fees, Cutoff Process, or Delinquent Notices programs, and there are pending payments that have been made using CSS – Utility Billing but that have not been processed within Munis, the programs display a Pending Web Payments Exists screen.



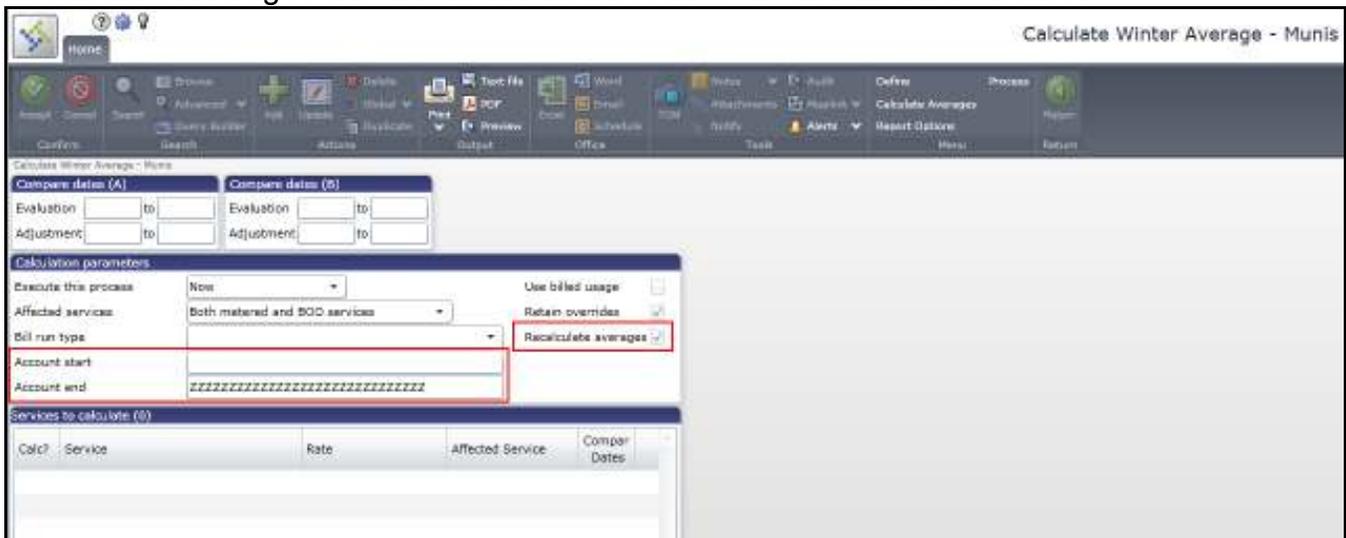
This screen identifies the account, the customer ID, the bill number, and the amount of the pending payment.

Calculate Charges

Within the Calculate Charges program, performance improvements have been made to the Calculate All step of the Bill Run Process. When executing this process in Munis Version 10.3, your organization should realize increased efficiencies that may vary in nature depending on your specific server configuration.

Calculate Winter Average

In the Calculate Winter Average program, the Calculation Parameters group includes the Recalculate Averages check box and the Account Start and End Date boxes.



Use the Recalculate Averages check box and the Account Start/End boxes to narrow the search criteria for the services to include in winter averaging.

Delinquent Notices

The Delinquent Notices program includes the Tyler Notify option, which sends automated messages to customers by telephone or email using customized templates.



This feature requires that Tyler Notify is implemented by your organization.

Delinquent Notices Stages, Delinquent Notices, Cutoff Process

The Delinquent Notice Stages program, available on the Setup menu, defines delinquent notice stages by account type. For each stage, you can define the notice type, event type, and the hold notice days. You can also indicate if a previous notice is required and specify the

number of days allowed for customer action before the subsequent stage applies.

Delinquent Notice Stages - Munis

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Email TCM Notes Attachments Maplink Notify Alerts History Return

Delinquent Notice Stages - Munis

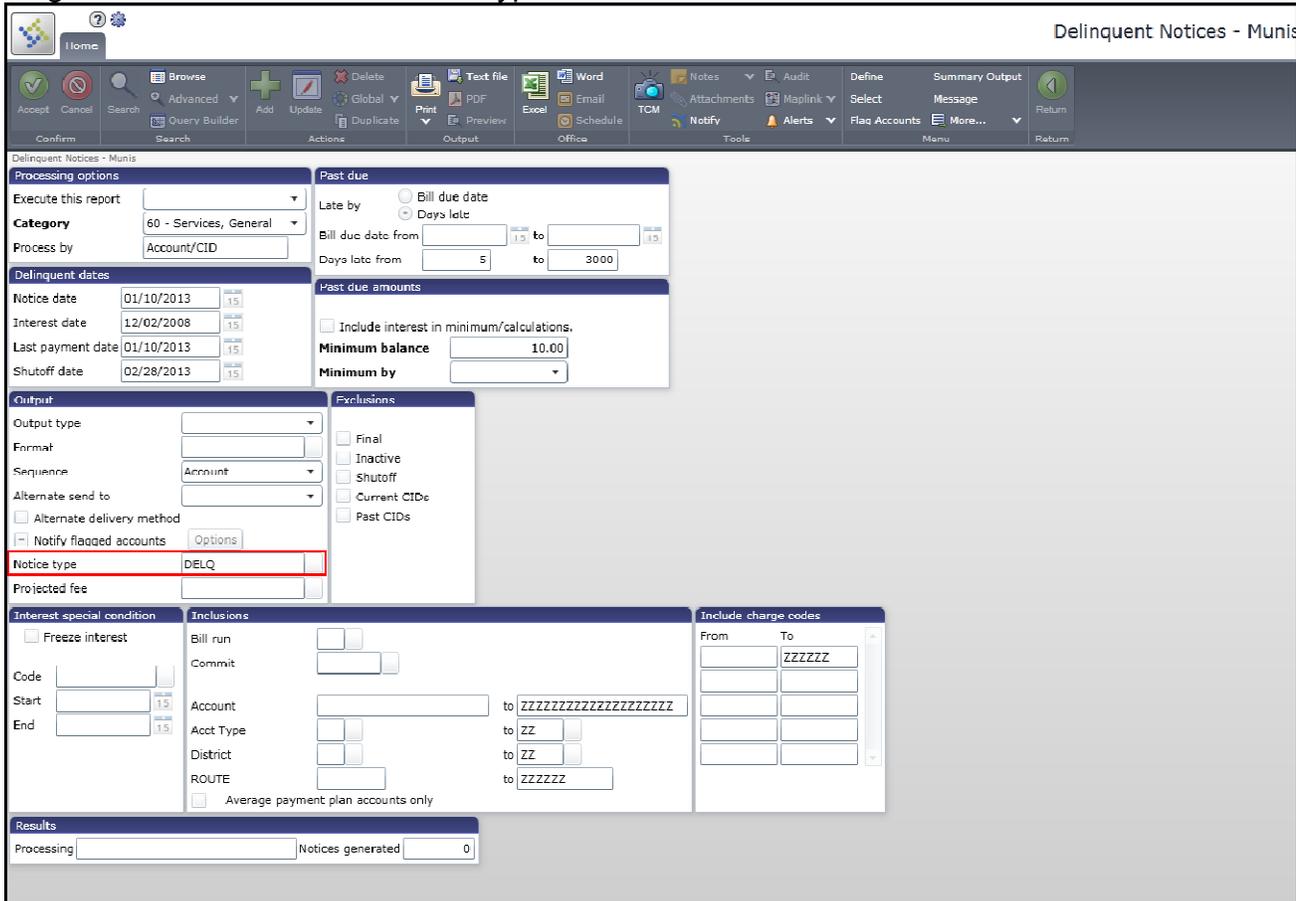
Stage Type

Account Type R - RES

Stage	Notice Type	Description	Event Type	Hold Notice Days	Days Since Last Notice	Prev Notice Req	Days Since Prev Beg	Days Since Prev End
1	30	30 DAYS DELINQUENT	DLN		30	<input type="checkbox"/>		
2	60	60 DAYS DELINQUENT	DLN		30	<input checked="" type="checkbox"/>	30	45

1 of 1

When processing notices, the Delinquent Notices program determines if a delinquent notice stage exists for the defined notice type.



If a delinquent notice stage does exist for the defined notice type, and if a prior notice type is required for the selected notice, the Delinquent Notices program searches for the most recent DLN – Delinquent Notices Account Event History record for the prior notice type and determines the number of days since that event. If the number of days exceeds the number of previous days required for the stage, the account/CID is selected for processing; if it is less than the number of previous days, the account/CID is excluded. If the notice type is blank, or no stage is defined for the account type, the program does not use delinquent notice stages for processing.

When the delinquent notice stages are complete, the Cutoff Process program identifies accounts for cutoff based on the value of the Cutoff Notify Type box, which defines the notice type. To identify account/CID records for cutoff process selection, the program searches for account/CID records with a notice type OFF – Cutoff Process for which there is an Account Event History record with the event type CUT. If an account/CID received a notice for the prior stage within the number of days specified in the Delinquent Stages program, the account/CID record is not selected for cutoff.

Cutoff Process - Munis

Home

Accept Cancel Search Advanced Query Builder Search Add Update Duplicate Actions Print PDF Preview Output Text file Word Excel Email Schedule Office Notes Attachments Maplink Notify Alerts Tools Define Report Output Generate Retain Lines Flag Cutoff More... Return

Cutoff Process - Munis

Processing options

Execute this process: [dropdown]
 Cutoff fee based on: Current hind bet
 Service category: General
 Cutoff by: Days late
 Due dates: 08/26/1985 to 01/09/2013
 Cutoff date: 01/17/2013
 Days late: 1 to 9999
 Cutoff notice type: [blank]

Actions to process

Apply charges
 Create service orders
 Add special conditions

Pact due

Initial cutoff selection
 Include miscellaneous charges
 Include interest in minimum/calculations
 Minimum balance: .01 Minimum I: Account/CID balance

Charges

Create additional deposits
 Use subject to fee codes
 Fee year: 2013
 Fee charge code: [dropdown]
 Calculation code: 00
 Fee amount/%: .000000

Selection criteria

Bill run: [checkbox] Commit: [dropdown]
 ROU'E: [dropdown] to ZZZZZZ
 Account type: [dropdown] to ZZ
 District: [dropdown] to ZZ

Include charge codes

From	To
	ZZZZZZ

General ledger posting

Effective date: 01/17/2013
 Year: 2012
 Period: 07 JAN
 Reference: [dropdown]

Move to final bill

Move to final bill
 Include all services
 Service stop date: [dropdown]
 Service status after final: [dropdown]

Service priority

First: [dropdown]
 Second: [dropdown]
 Third: [dropdown]
 Fourth: [dropdown]

Service orders

Include all metered services on one service order if multiples exist
 Type: TOFF - Turn off
 Reason code: BRKN - BROKEN METER
 Department: [dropdown]
 Assigned to: [dropdown]
 Comment: [text area]

Report options

Create event history reports
 Notify flagged accounts
 Include report for total due by age group
 Sequence: Account
 Output: 1 - All accounts
 Print user defined field: 0

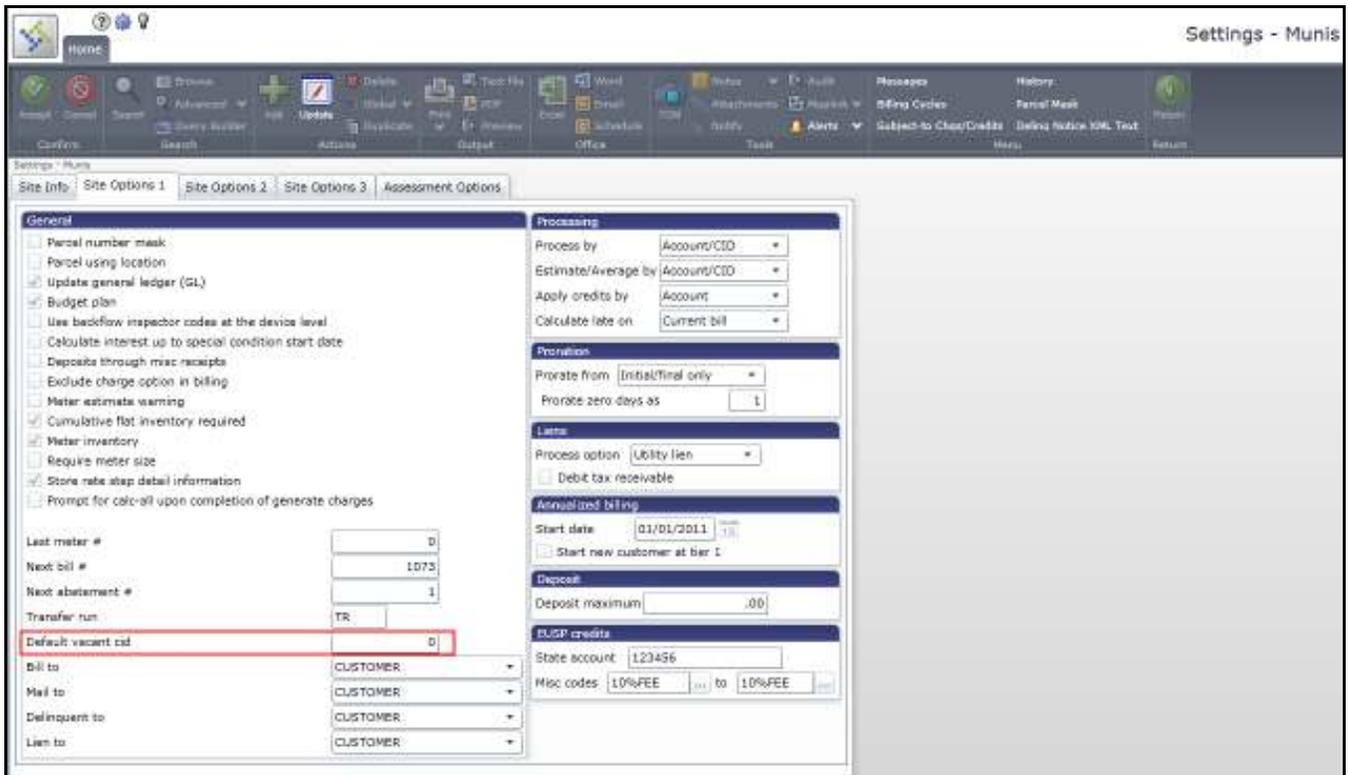
Results

Records selected: 0 Records flagged: [dropdown]

If the Cutoff Notify Type box is blank, or no stage is defined for the selected account type, the program does not use delinquent notice stages for processing.

UB Settings, Utilities

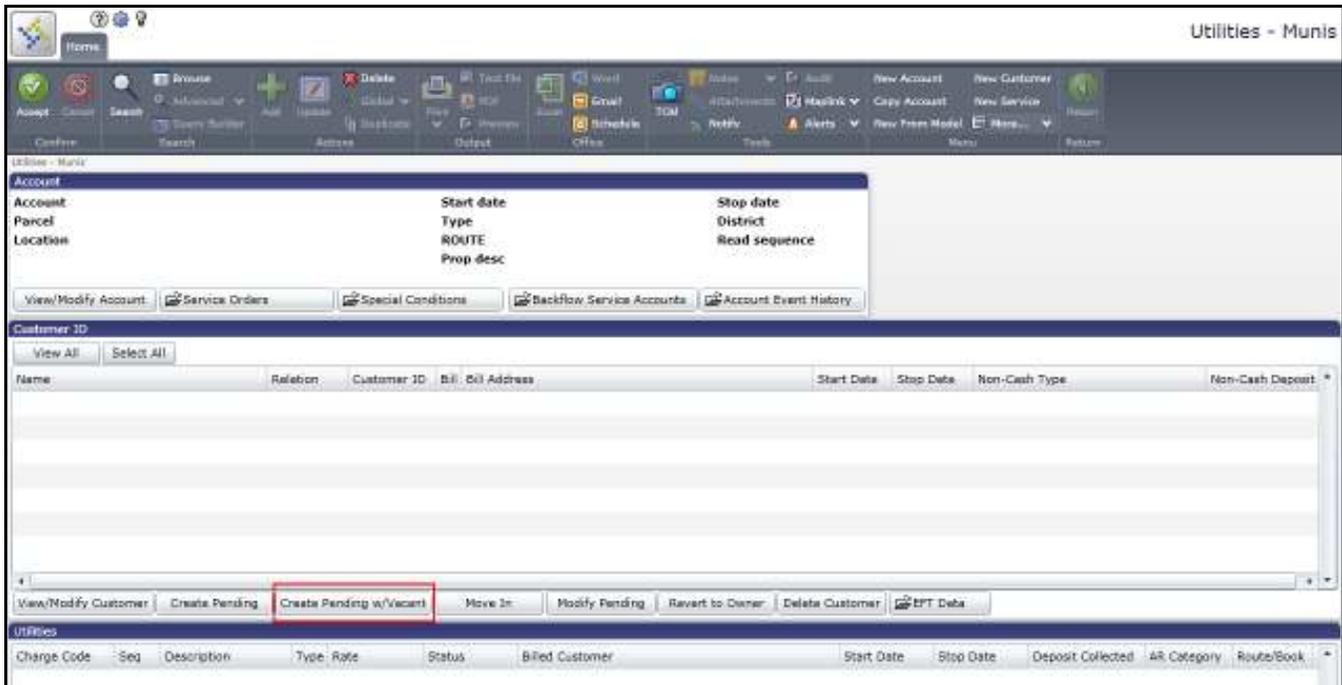
In the UB Settings program, the Default Vacant CID box on the Site Options 1 tab allows you to define a vacant CID.



The screenshot shows the 'Settings - Munis' application window. The 'Site Options 1' tab is selected. The 'General' section contains various checkboxes and input fields. The 'Default vacant cid' field is highlighted with a red box and contains the value '0'. Other fields include 'Last meter #' (0), 'Next bill #' (1073), 'Next abatement #' (1), and 'Transfer run' (TR). The 'Processing' section includes dropdown menus for 'Process by', 'Estimate/Average by', 'Apply credits by', and 'Calculate late on'. The 'Provision' section has 'Prorate from' (Initial/final only) and 'Prorate zero days as' (1). The 'Lien' section has 'Process option' (Utility lien) and 'Debit tax receivable'. The 'Annualized billing' section has 'Start date' (01/01/2011) and 'Start new customer at tier 1'. The 'Deposit' section has 'Deposit maximum' (.00). The 'RUGP credits' section has 'State account' (123456) and 'Misc codes' (10%FEE to 10%FEE).

When you complete this box with a value that is not zero (0), the Utilities program provides the Create Pending with Vacant option, which completes the Create Pending process using the

default vacant CID number.



The value of the Default Vacant CID box in the Settings program must match the customer number that is currently used to identify a vacant CID record, or you must create a vacant CID number to match the default number.

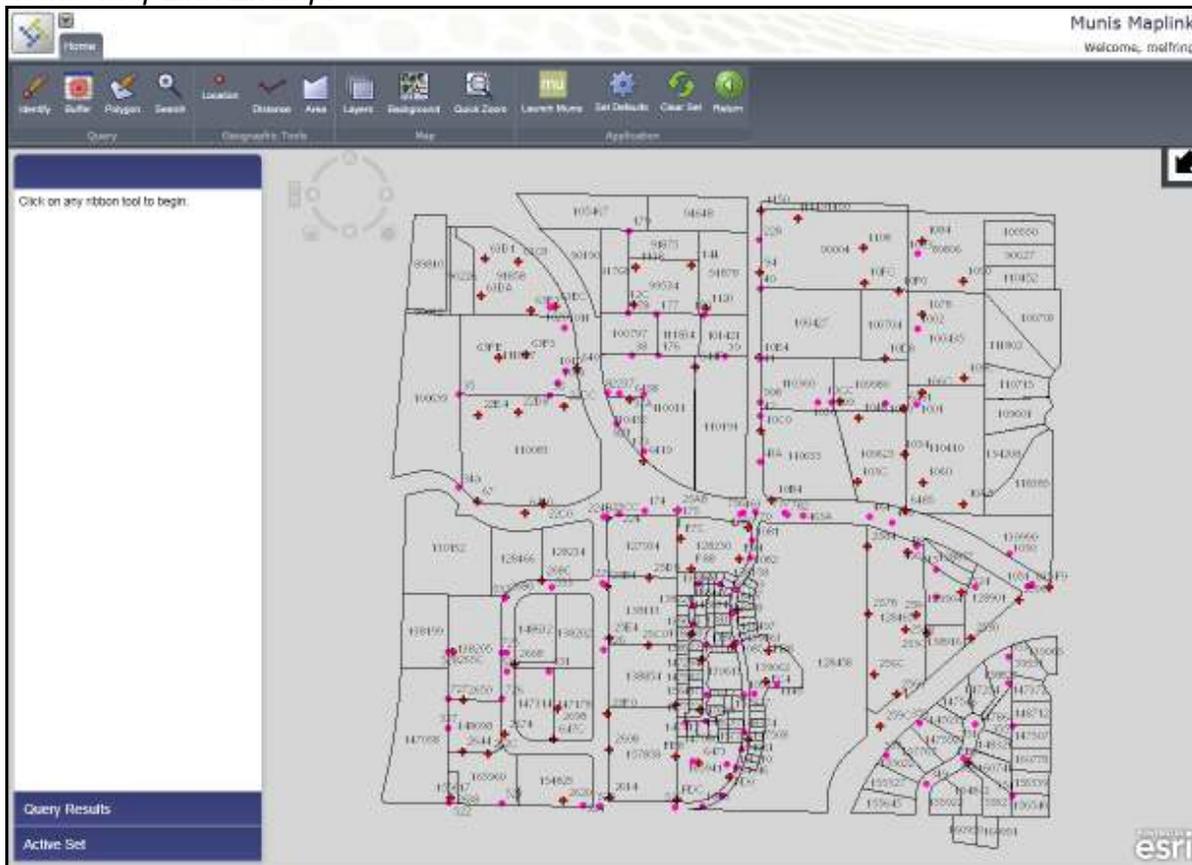
Utilities

The MapLink option, which accesses the Munis MapLink application, is available in the Tools group of the ribbon. Munis MapLink maps assets and properties using esri® ArcGIS tools.



You can use MapLink to view geographic information system (GIS) information about assets or associated Munis information, such as utility billing service orders. Maps are unique to your organization's ArcGIS server.

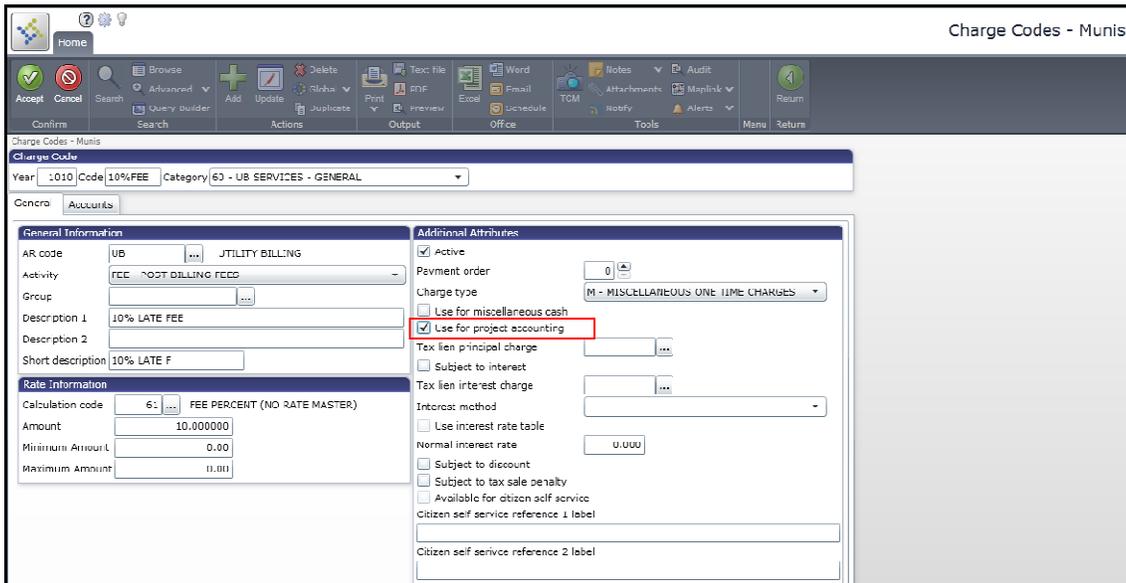
Munis MapLink Example



Utility Billing/Project Ledger Accounting

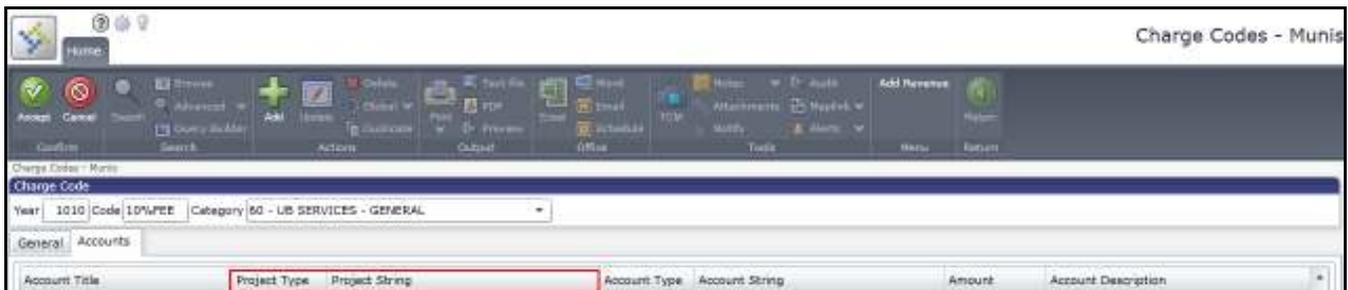
Utility Billing provides the ability to track revenue for specific fees and charges towards a particular project within the general ledger. To use this functionality, you must have Project Ledger Accounting enabled within Munis General Ledger, and you must define the project type and project string in the Accounts Receivable Charge Codes program.

In Accounts Receivable Charge Codes, the Use with Project Accounting check box must be selected on the General tab.



The screenshot shows the 'Charge Codes - Munis' application interface. The 'General' tab is active, and the 'Use for project accounting' checkbox is checked and highlighted with a red box. Other visible fields include 'Year: 1010', 'Code: 10%FEE', 'Category: 60 - UB SERVICES - GENERAL', 'AR code: UB', 'Activity: FEE POST BILLING FEES', 'Description 1: 10% LATE FEE', 'Description 2: 10% LATE F', 'Short description: 10% LATE F', 'Calculation code: 6', 'Amount: 10.000000', and 'Minimum Amount: 0.00'.

When this is selected, the Project Type and Project String boxes are available on the Accounts tab.



The screenshot shows the 'Charge Codes - Munis' application interface with the 'Accounts' tab active. The 'Project Type' and 'Project String' fields are highlighted with a red box. Other visible fields include 'Year: 1010', 'Code: 10%FEE', 'Category: 60 - UB SERVICES - GENERAL', 'Account Title', 'Account Type', 'Account String', 'Amount', and 'Account Description'.

For those charge codes for which the project type and project string are identified, charges are reconciled with the defined project.

Tyler Notify Version 10.3

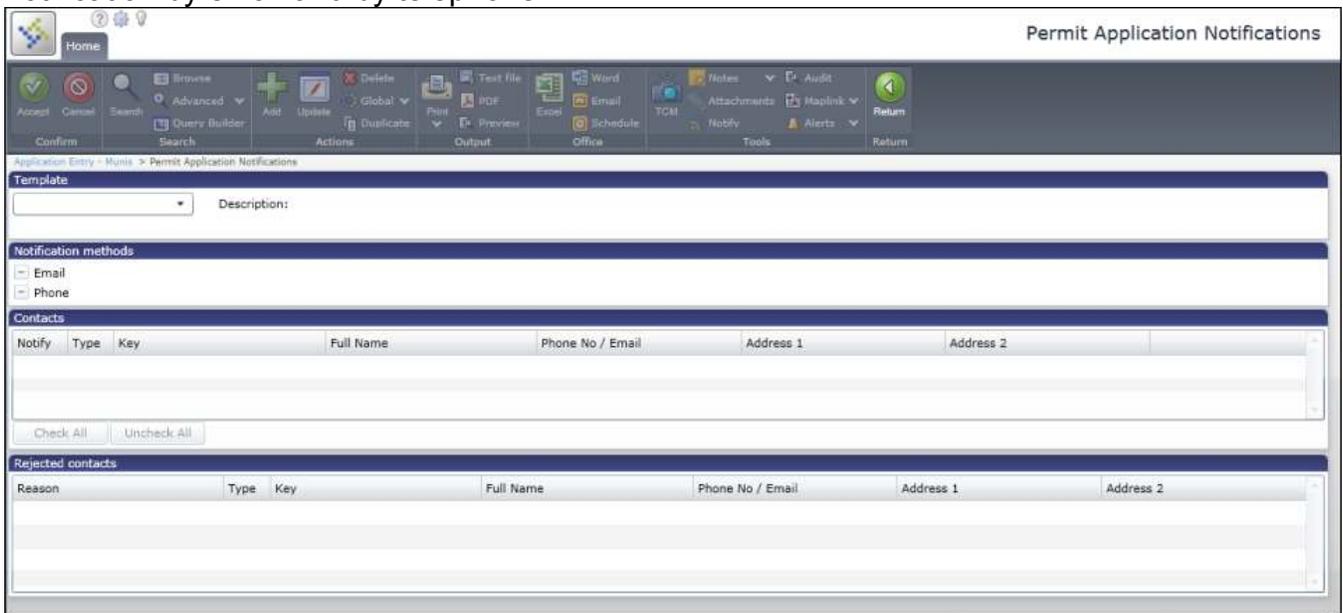
Munis is integrated with Tyler Notify to provide automated electronic notifications through telephone calls or emails. This feature requires that you purchase and install Tyler Notify. Once installed, the connection to Tyler Notify must be configured by entering the Tyler Notify base URL and Tyler Notify Munis Integration URL on the Application Integration screen of the Munis Site Settings program. Templates and message content for programs enabled to use Tyler Notify are maintained by system administrators.



The following Munis Revenues programs are enhanced with Tyler Notify:

- Accounts Receivable
 - Electronic Funds Transfer (EFT)
 - Assess Late Fees
- Business Licenses
 - Inactivate Expired Licenses
- Permits and Code Enforcement
 - Complaint/Violation Notices
- Utility Billing – CIS
 - Delinquent Notices

When the Notify button is clicked in a program, the Notification screen opens allowing you to select a predefined template and the notification methods to send the message. If the Customer record has a telephone number and an email address, the customer receives the notification by email and by telephone.



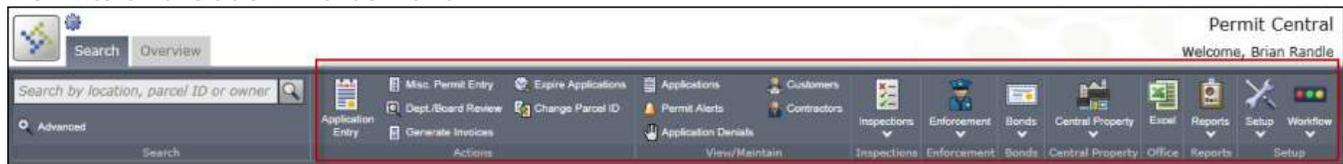
Munis Centrals Programs Version 10.3

The following changes apply to Munis Centrals programs.

Important! The Central search programs cap search results at 1000 records. The programs do not provide a message or other indicator when the maximum number of records is reached.

Permit Central

The ribbon provides buttons that access various Munis programs in Accounts Receivable and Permits and Code Enforcement.

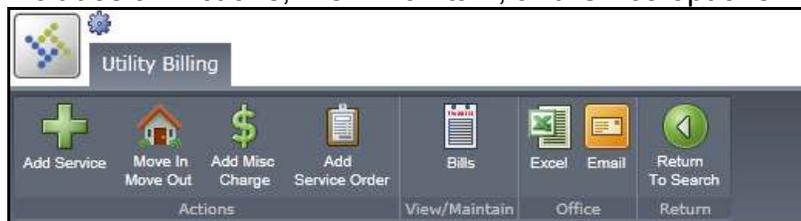


UB Central

The UB Central program includes an updated look-and-feel that is designed to provide more efficient usability.



When you click Details on the Accounts pane, the Details page includes a ribbon, which includes an Actions, View/Maintain, and Office options.



The page displays the information panes as defined on the Settings page. The Account Overview and the Account Information panes include the View/Maintain menu, which provide options for viewing and maintaining account details.

Utility Billing Central
Welcome, Maurien Billing

188 ty Billing

[Add Service](#)
[Manage My Use](#)
[Add Meter Change](#)
[Add Service Order](#)
[View My Account](#)
[Account Transfer](#)
[Request To Disconnect](#)

EXCELSIOR PROPERTY MANAGERS

001001 23 BAY AVE MUNIS, US 12345 HICKORY HILL ESTAT

[View Last Bill in Munis](#)
[View Last Bill in TCM](#)
[Modify Last Bill](#)
[Make Payment](#)

Account Overview View/Modify

Alerts View/Modify
Active Services
Charges Summary
Backflow

Payments View/Modify
Outstanding View/Modify
Delinquent View/Modify

Last Bill / Payment
 Service / Order

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan
 No payments found.

Account Information
 Alerts
 Active Services
 Charges Summary
 Backflow

Add New Service
 Amend My Meter Use
 Add Meter Change
 Add Service Order
 Bill Maintenance

Serial | Inspection Date | Transition Date | Inspection Fee |
 43555722365 | | | |
 3287482274 | | | |

Customer Billing
 Name: EXCELSIOR PROPERTY MANAGERS
 Billing Address: 1431 PAWTUCKET BLVD
 02874-8224

all address: Billing Doc Copy 1
 No alternate addresses found.

Account Start Date: 07/04/2003
 Account Status: Active

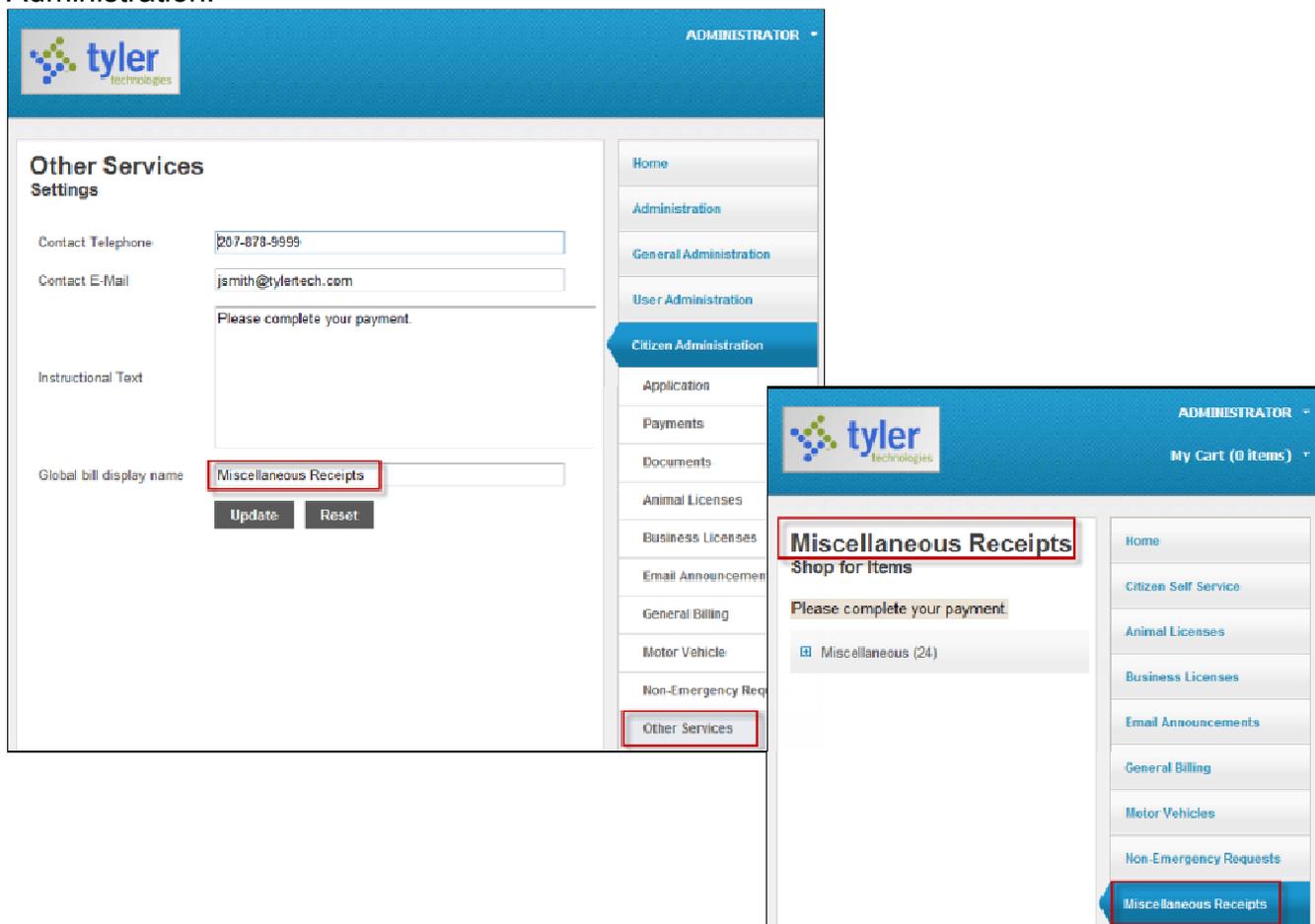
Munis Self Service Version 10.3

The Munis Self Service programs available for the Revenues product are included in Citizen Self Service (CSS). The following changes apply to Munis Citizen Self Service programs.

Citizen Administration

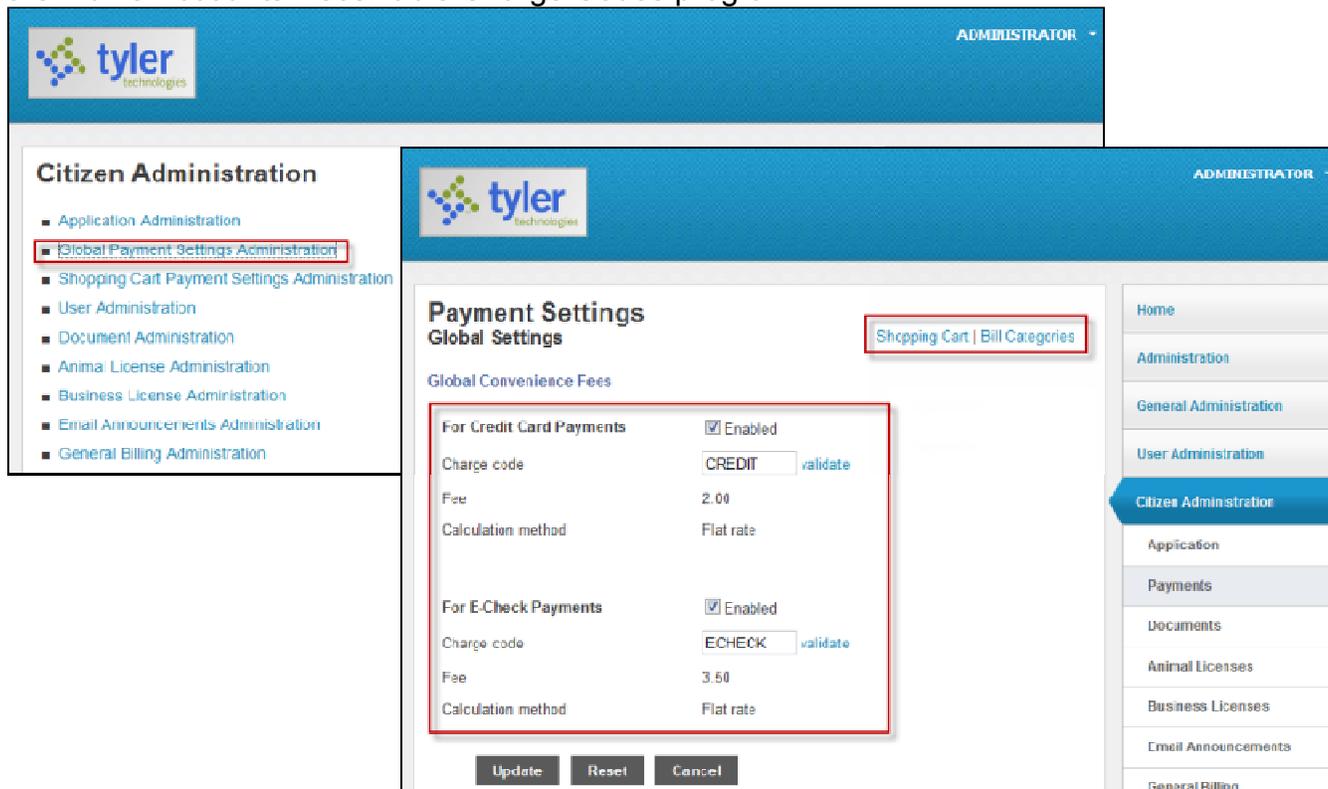
Citizen Administration allows updates to module names in Citizen Self Service, with the exception of Tax Relief and Email Announcements. The specific modules that allow the changes are: Animal Licenses, Business Licenses, General Billing, Non-Emergency Requests, Motor Vehicle, Other Services (Miscellaneous Receipts), Parking Tickets, Permits and Inspections, Personal Property, Real Estate, and Utility Bills.

Note: The updates do not affect the administrative module names in Citizen Self Service Administration.



Payments Administration

The Global Convenience Fees settings on the Payment Settings screen, under Global Payments Setting Administration, are available for credit card payments or eCheck payments. Each of the settings require activation through the check box, a charge code for the process, a fee amount, and a calculation method. Prior setup requires you to create miscellaneous cash receipt charge codes for credit code convenience fees and eCheck convenience fees through the Munis Accounts Receivable Charge Codes program.



The screenshot displays the Tyler Technologies web application interface. On the left, a navigation menu under 'Citizen Administration' lists various modules, with 'Global Payment Settings Administration' selected. The main content area is titled 'Payment Settings Global Settings' and features a 'Shopping Cart | Bill Categories' link. The 'Global Convenience Fees' section is divided into two parts: 'For Credit Card Payments' and 'For E-Check Payments'. Each part includes an 'Enabled' checkbox, a 'Charge code' dropdown menu (CREDIT for credit cards, ECHECK for e-checks), a 'Fee' field (2.00 for credit cards, 3.50 for e-checks), and a 'Calculation method' field (Flat rate). At the bottom of the form are 'Update', 'Reset', and 'Cancel' buttons. A right-hand navigation pane shows a list of application areas, with 'Citizen Administration' currently active.

Bill Categories

Bill Year and Bill Number list options are available for the modules in Citizen Administration (Invoice Year and Invoice Number for Permits Inspections). Bill Year Search Default and Bill Year Search Range Calculation are available in the Business License, General Billing, Motor Vehicle, Permits Inspections, Personal Property, Real Estate, and Utility Billing modules. In Business License searches, the Owner Name field values are not required to be uppercase characters.

The Search Field Setup section of each module allows you to set the page order of the search pages.

Note: A correct numeric sequence must be selected for the search page order values.

General Billing Settings

Contact Telephone

Contact E-Mail
also used for change of address

Complete one or more of the following fields to search for General Billing bills.

Query Text

Global bill display name

Suppress display of Customer Type in search results

Access Control

Access to General Billing

Allow linking to Linked Customer Accounts

Note: The Linked Customer Accounts feature is currently enabled.

Search Field Setup

Customer Name Page order

Customer ID Page order

Number and Street Page order

City Page order

State Page order

Zip Code Page order

Parcel Page order

Bill number Page order

Bill year Page order

Bill year search default Collection year Current year None

Bill year search range calculation
(Enter 0 for none) Current or collection year minus to

Current or collection year plus

Update

Reset

Home

Administration

General Administration

User Administration

Citizen Administration

Application

Payments

Documents

Animal Licenses

Business Licenses

Email Announcements

General Billing

Motor Vehicle

Non-Emergency Requests

Other Services

Parking Tickets

Permits Inspections

Personal Property

Real Estate

Utility Billing

Employee Administration

Vendor Administration

General Billing, Motor Vehicle Taxes, Personal Property Taxes, and Real Estate Property Taxes

The As Of date box is available on the Manage Bills page for General Billing and the View Bills pages for Motor Vehicle Taxes, Personal Property Taxes, and Real Estate Property Taxes. Citizens can modify the date to see what their due amount will be as of a certain

date.

ADMINISTRATOR ▾
My Cart (0 items) ▾

General Billing

Manage Bills

Customer: FRITZ, MICHAEL

Address: 1 COLE HAAN DRIVE
YARMOUTH, ME 04096

Customer number: 187

Bill	Type	Pay By	Total Unpaid	Balance Due		
<input checked="" type="checkbox"/>	10210	PERMITS AND INSPECTIONS	4/3/2013	\$100.00	\$100.00	Details
<input type="checkbox"/>	10200	GENERAL BILLING	2/7/2013	\$0.00	\$0.00	Details
<input checked="" type="checkbox"/>	10193	GENERAL BILLING	2/7/2013	\$1,200.00	\$1,200.00	Details
<input checked="" type="checkbox"/>	10197	GENERAL BILLING	2/7/2013	\$100.00	\$100.00	Details
<input checked="" type="checkbox"/>	10189	GENERAL BILLING	2/3/2013	\$5.00	\$5.00	Details
<input checked="" type="checkbox"/>	10187	GENERAL BILLING	2/1/2013	\$600.00	\$600.00	Details
<input type="checkbox"/>	10180	GENERAL BILLING	7/22/2012	\$0.00	\$0.00	Details
<input type="checkbox"/>	10177	GENERAL BILLING	5/16/2012	\$0.00	\$0.00	Details
<input checked="" type="checkbox"/>	10178	GENERAL BILLING	5/16/2012	\$1,000.00	\$1,000.00	Details
<input checked="" type="checkbox"/>	10172	GENERAL BILLING	3/21/2012	\$30.00	\$30.00	Details
<input type="checkbox"/>	10173	GENERAL BILLING	3/21/2012	\$0.00	\$0.00	Details
<input type="checkbox"/>	24112101	GENERAL BILLING	3/21/2012	\$0.00	\$0.00	Details
<input type="checkbox"/>	10204	GENERAL BILLING	2/13/2011	\$0.00	\$0.00	Details

As of 3/18/2013

Total Unpaid 3035.00

Total Balance Due 3035.00

Add selected bills to cart

- Home
- Citizen Self Service
- Animal Licenses
- Business Licenses
- Email Announcements
- General Billing
- Accounts
- Contact Us
- Manage Bills
- Search Results
- New Search
- Motor Vehicles
- Non-Emergency Requests
- Miscellaneous Receipts
- Parking Tickets
- Permits and Inspections
- Personal Property
- Real Estate
- Tax Relief
- Utility Billing

Utility Billing

The Bank Name box replaces the list on the Automatic Payments page. It provides an auto-lookup feature where you can begin to type the name of your bank and the screen displays the bank and routing number.

Other changes include a Routing Number box that allows you to enter the banks nine digit code and email messages mask all but the last three digits of the customer's bank account number.



[ADMINISTRATOR](#) ▾
[My Cart \(0 Items\)](#) ▾

Utility Billing

Automatic Payments

To sign up for automatic payments, please complete the form below.

Service Address

Account Number

Bank name *

Routing number *
9 digits

Bank telephone *

Account number *

Account type *
 Checking
 Savings

Your name *

Your telephone number *

Your email address *

* indicates required values.

ASSOCIATED BANK - 075901121

BANK OF AMERICA - 111000025

BANK OF AMERICA - 061477986

CHASE MANHATTAN BANK - 239848554

CITIBANK - 388554498

FLEET BANK - 182273221

NATIONS BANK - 192832115

- [Home](#)
- [Citizen Self Service](#)
- [Animal Licenses](#)
- [Business Licenses](#)
- [Email Announcements](#)
- [General Billing](#)
- [Motor Vehicles](#)
- [Non-Emergency Requests](#)
- [Miscellaneous Receipts](#)
- [Parking Tickets](#)
- [Permits and Inspections](#)
- [Personal Property](#)
- [Real Estate](#)
- [Tax Relief](#)
- [Utility Billing](#)

Available Web Parts Version 10.3

Web parts are web-based portals that display information from various Tyler organizations or that provide links to third-party applications. The following table provides a description of web parts available in Munis Version 10.3 for the Tyler Dashboard and Munis tenants.

Web Part	Description
Tyler Dashboard	
My Tyler Community	Provides direct access to Tyler Community items such as forums, conversations, and groups.
Munis	
eLearning Links	Provides a catalog of available Munis eLearning tutorials; when you click a tutorial link, the tutorial opens in a window outside of the Tyler Dashboard.

Major Enhancements – Munis® Version 10.4

Revenues

This document provides an overview of the major Revenues enhancements for Munis® Version 10.4. Revenues programs include Citizen Self Service (CSS) and central programs.

The Munis Revenues product contains General Revenues and Property Revenues:

- General Revenues includes Accounts Receivable, Animal Licenses, General Billing, Maine Vehicle Registration, Parking Tickets, Slip Reservations, Vehicle Stickers, and Virginia State Income Tax.
- Property Revenues includes Accounts Receivable, Business Licenses, Central Property, Permits and Code Enforcements, Property Tax Billing, and Utility Billing.
- Revenues central programs include Customer Central, Property Central, UB Central, Contractor Central, and Permit Central.

Please refer to the Version 10.4 Munis Release Notes on the Munis Knowledgebase (<http://muniskb.tylertech.com/search.aspx>) for information regarding state-specific updates and all other changes not covered in this document.

Accounts Receivable Version 10.4

The following changes apply to Munis Accounts Receivable programs.

Accounts Receivable Charge Codes

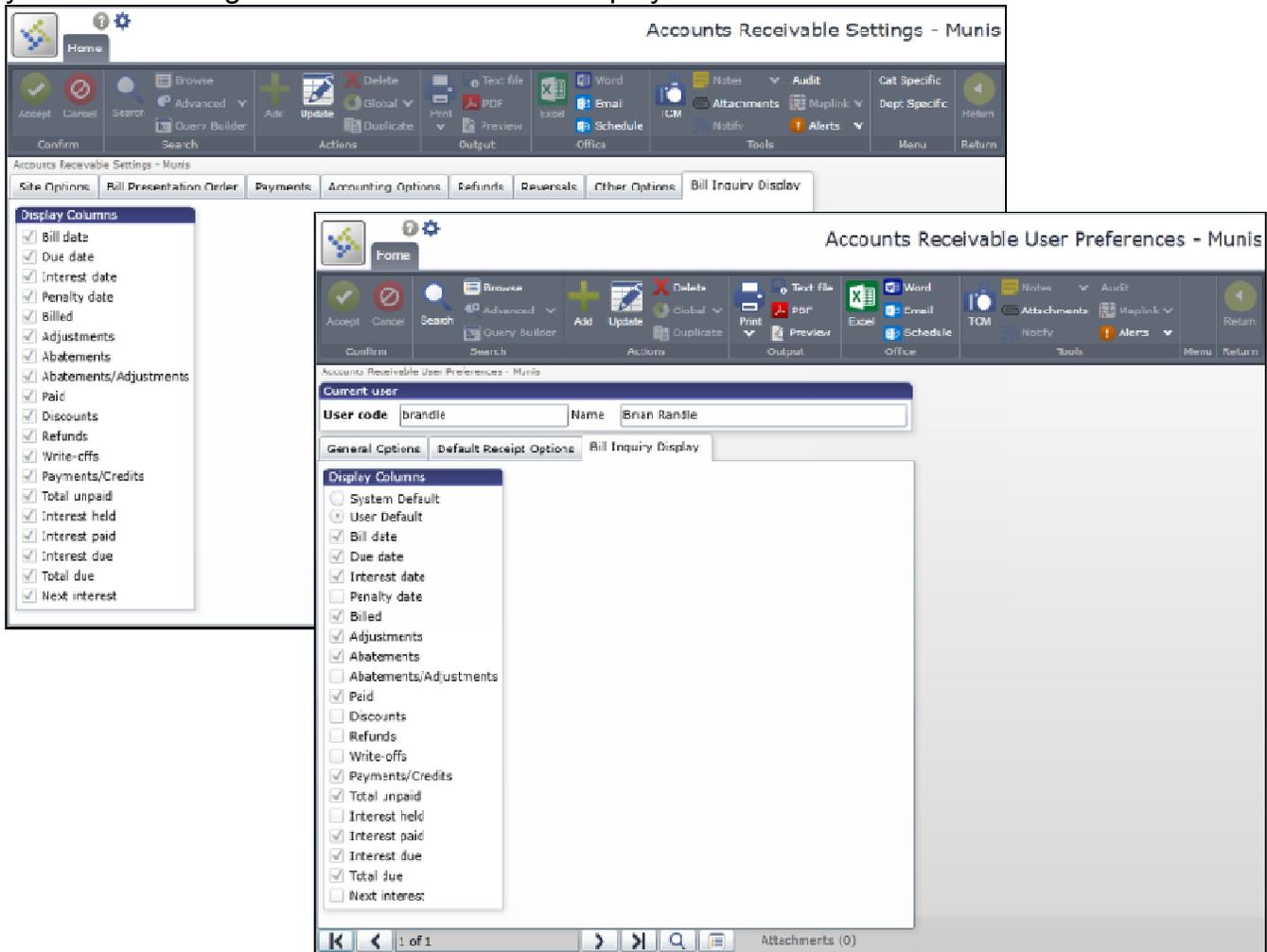
When you select the Use for Citizen Self Service Convenience Fee check box for a charge code, that charge code is only available in Citizen Self Service as the Convenience Fee charge code for credit cards and eChecks and is not available on the Other Options page for miscellaneous payments.

The screenshot illustrates the configuration of a charge code and the resulting payment error. In the 'Charge Codes - Munis' window, the 'Additional Attributes' section shows the 'Use for Citizen Self Service convenience fee' checkbox checked. The 'Rate Information' section shows a 'FIXED AMOUNT FROM CHARGE CODE' of 2.000000. The 'Payment Settings' window shows 'Global Convenience Fees' with 'For Credit Card Payments' set to 'Enabled' and 'CREDIT' selected as the charge code. The 'Miscellaneous Receipts' window shows a list of items for purchase, with a message stating: 'The Credit charge code is not available as it is selected to use for convenience fees'.

Item	Amount	Action
LARGE T-SHIRT	\$10.00	Add to Cart
MEDIUM T-SHIRT	\$8.00	Add to Cart
NORMAL TRANSFER	\$5.00	Add to Cart
SMALL T-SHIRT	\$5.00	Add to Cart
TOWN HAT	\$5.00	Add to Cart
TOWN PENS	\$3.00	Add to Cart

Account Receivables Settings, Accounts Receivable User Preferences

The Bill Inquiry Display tab in Accounts Receivable Settings provides check boxes for items to display on the Single Bill View screen in Bill Inquiry for all users. The Bill Inquiry Display tab in Accounts Receivable User Preferences allows you to determine which items to display when you view the Single Bill View screen in Bill Inquiry.



The image displays two screenshots from the Tyler Technologies software interface. The top screenshot shows the 'Accounts Receivable Settings - Munis' window, with the 'Bill Inquiry Display' tab selected. The bottom screenshot shows the 'Accounts Receivable User Preferences - Munis' window for user 'brandie', also with the 'Bill Inquiry Display' tab selected.

Accounts Receivable Settings - Munis (Bill Inquiry Display tab):

- Display Columns:
 - Bill data
 - Due date
 - Interest date
 - Penalty date
 - Billed
 - Adjustments
 - Abatements
 - Abatements/Adjustments
 - Paid
 - Discounts
 - Refunds
 - Write-offs
 - Payments/Credits
 - Total unpaid
 - Interest held
 - Interest paid
 - Interest due
 - Total due
 - Next interest

Accounts Receivable User Preferences - Munis (Bill Inquiry Display tab):

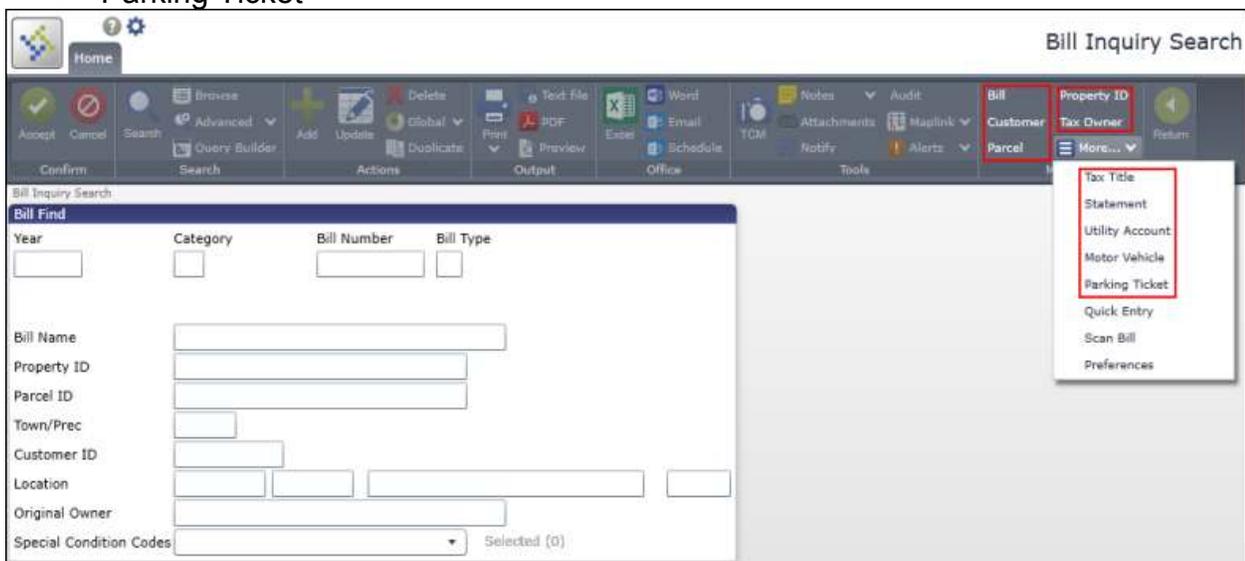
Current user: brandie (Name: Brian Randle)

- Display Columns:
 - System Default
 - User Default
 - Bill date
 - Due date
 - Interest date
 - Penalty date
 - Billed
 - Adjustments
 - Abatements
 - Abatements/Adjustments
 - Paid
 - Discounts
 - Refunds
 - Write-offs
 - Payments/Credits
 - Total unpaid
 - Interest held
 - Interest paid
 - Interest due
 - Total due
 - Next interest

Bill Inquiry

Bill Inquiry is modified to display the Bill Inquiry Search screen as the program opens. Search options on the screen include:

- Bill
- Customer
- Parcel
- Property ID
- Tax Owner
- Statement
- Utility Account (accesses the Utility Account search screen)
- Motor Vehicle
- Parking Ticket



The screenshot shows the 'Bill Inquiry Search' application window. At the top right, the title is 'Bill Inquiry Search'. Below the title bar is a ribbon-style navigation area with buttons for 'Home', 'Bill', 'Customer', and 'Parcel'. A 'More...' dropdown menu is open, listing search options: 'Tax Title', 'Statement', 'Utility Account', 'Motor Vehicle', 'Parking Ticket', 'Quick Entry', 'Scan Bill', and 'Preferences'. The main content area features a 'Bill Find' form with the following fields:

Year	Category	Bill Number	Bill Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bill Name	<input type="text"/>		
Property ID	<input type="text"/>		
Parcel ID	<input type="text"/>		
Town/Prec	<input type="text"/>		
Customer ID	<input type="text"/>		
Location	<input type="text"/>	<input type="text"/>	<input type="text"/>
Original Owner	<input type="text"/>		
Special Condition Codes	<input type="text"/> Selected (0)		

Other options include Quick Entry, Scan Bill, and Preferences (Accounts Receivable User Preferences).

Once the records are found, the program opens the Single Bill View screen for specific records or the Account View screen with a list of records for the account.

Bill Inquiry: Single Bill View - Munis

Customer Information: FRITZ, MICHAEL, 1 COLE HAAN DRIVE, WARDROUTH, NE 68496, 207-878-9998

Instalment	Bill Date	Due Date	Interest Date	Billed	Adjustments	Abatements	Paid
1	06/27/2013	07/27/2013	07/28/2013	2500.00	750.00	0.00	0.00
4	10/09/2013			0.00	0.00	0.00	0.00

Bill Inquiry: Account View - Munis

Customer Information: FRITZ, MICHAEL, 1 COLE HAAN DRIVE, WARDROUTH, NE 68496, 207-878-9998

Year	Cat	Bill	Reference	Bill Date	Due Date	Interest Date	Billed	Adjustments	Abatements	Paid	Pnt/Crd	Unpaid	Interest Paid	Interest Due	Total Due
2009	1	10177	04/16/12 387	04/16/2012	05/16/2012	05/31/2012	20.00	0.00	0.00	0.00	50.00	20.00	0.00	0.00	0.00
2009	1	10178	04/16/12 387	04/16/2012	05/16/2012	05/31/2012	1900.00	0.00	0.00	0.00	50.00	50.00	950.00	0.00	950.00
2009	1	10180	06/22/12 387	06/22/2012	07/22/2012	08/06/2012	100.00	0.00	0.00	0.00	110.00	110.00	-10.00	0.00	-10.00
2009	1	10187	01/02/13 387	01/02/2013	02/01/2013	02/16/2013	600.00	0.00	0.00	0.00	0.00	0.00	600.00	0.00	600.00
2009	1	10189	01/04/13 387	01/04/2013	02/03/2013	02/18/2013	5.00	0.00	0.00	0.00	0.00	0.00	5.00	0.00	5.00
2009	1	10193	01/08/13 387	01/08/2013	02/07/2013	02/22/2013	1200.00	0.00	0.00	0.00	0.00	0.00	1200.00	0.00	1200.00
2009	1	10197	01/08/13 387	01/08/2013	02/07/2013	02/22/2013	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2009	20	1000001	1 COLE HAAN DR01 02/18/2013	02/18/2013	03/18/2013	03/18/2013	4220.00	0.00	0.00	371.39	371.39	3678.61	228.61	9.07	3687.68
2009	55	1	ME-CLER - P-4 03/13/2012	04/12/2012	04/12/2012	04/12/2012	10.00	0.00	0.00	5.00	5.00	5.00	0.00	0.00	5.00
2009	55	100247	JAN: 6700134/CCC 01/31/2012	01/31/2012	03/01/2012	03/01/2012	35.00	0.00	0.00	10.00	10.00	25.00	0.00	5.64	30.64
2010	1	10173	02/20/12 387	02/20/2012	03/21/2012	04/05/2012	50.00	30.00	0.00	85.00	85.00	-5.00	0.00	0.00	-5.00
2010	1	10179	02/20/12 387	02/20/2012	03/21/2012	04/05/2012	100.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00	0.00
2010	1	2411291	02/20/12 387	02/20/2012	03/21/2012	04/05/2012	100.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00	0.00
2010	20	1000001	1 COLE HAAN DR01 04/01/2010	04/01/2010	05/01/2010	05/01/2010	1550.00	0.00	0.00	0.00	0.00	0.00	1550.00	0.00	479.01
2010	20	1000001	1 COLE HAAN DR01 04/01/2010	04/01/2010	05/01/2010	05/01/2010	150.00	0.00	0.00	153.63	150.00	0.00	21.37	0.00	0.00
2010	55	100251	FEB: 6700138/7AN 01/01/2011	01/01/2011	01/31/2011	01/31/2011	35.00	0.00	0.00	35.00	35.00	0.00	0.00	0.00	0.00
2011	1	10209	01/08/13 387	01/08/2013	02/07/2013	02/22/2013	45.19	0.00	0.00	50.00	50.00	-4.81	0.00	0.00	-4.81
2011	1	10204	01/11/13 387	01/11/2013	02/13/2013	03/28/2013	500.00	0.00	0.00	500.00	500.00	0.00	0.00	0.00	0.00
2011	20	4	1 COLE HAAN DR01 04/01/2011	04/01/2011	05/01/2011	05/01/2011	4700.00	320.00	0.00	0.00	0.00	5020.00	0.00	1049.38	6069.38
Total							80281.80	146455.00	0.00	3655.66	3622.03	223114.80	278.51	12153.34	234003.14

Single View Bill provides information for one bill.

Account View provides a list of all bills related to the customer.

Miscellaneous Cash Payments Import

When the miscellaneous payment import file contains a line type of "G", the program allows you to override the default general ledger accounts on the charge code and use what is specified in the import file.

The screenshot displays the 'Miscellaneous Cash Payments Import - Munis' application. A Notepad window titled 'Misc Cash Import - Notepad' shows the following import file content:

```

File Edit Format View Help
M201309232013FRITZ, MICHAEL 1
MS000000187
DVITAL 000002000<--REF1--><--REF2-->
G1000 4500 0000020000
  
```

A red box highlights the line 'G1000 4500 0000020000' in the Notepad window, with a red arrow pointing to a callout box that reads 'Miscellaneous Cash Payments Import file'.

The 'Receipts - Munis' window shows the resulting receipt details. The 'Charge Allocation' table is as follows:

Line	Org	Obj	Proj	Interest	Principal	Adjustment
1	1000	4500		.00	200.00	.00

A red arrow points from a callout box that reads 'Receipts reflects the GL accounts used in the Miscellaneous Cash payment import file.' to the '1 1000 4500' line in the Charge Allocation table.

Over-Short Adjustment Process

The Special Condition list includes the Include if in Selected Set and Exclude if in Selected Set options. Select Include if in Selected Set to include the special condition codes that are available when you click Selected. Select Exclude if in Selected Set to exclude those same special condition codes.


Over-Short Adjustment Process - Munis

Home

Accept Cancel Search Advanced Add Update Delete Global Print PDF Excel Word Notes Audit Attachments Maplink Return

Confirm Search Query Builder Actions Duplicate Output Preview Office Schedule Tools Alerts Menu Return

Scheduling

Execute this report: Now

Selection Criteria

Customer number	<input type="text"/>	BL category code	<input type="text"/>
Bill year range	<input type="text" value="0"/> to <input type="text" value="9999"/>	MV cycle/comm range	<input type="text" value="000"/> to <input type="text" value="999"/>
Include bills with	<input type="text"/>	UB days late range	<input type="text" value="1"/> to <input type="text" value="9999"/>
AR category range	<input type="text" value="1 - GENERAL BILLING"/> to <input type="text" value="63 - UB SERVICES - ELECTRIC"/>	UB account status	<input type="text"/>
AR Code	<input type="text"/>		
Bill number range	<input type="text" value="0"/> to <input type="text" value="999999999"/>		

Write-off bill balances between and

Only write-off charge Only if it is the last charge due

Exclude bills that have no payment activity

Print the charge detail

Special condition codes Selected (0)

Exclude if in selected set
 Include if in selected set

Processing Options

Department:

Write-off reason:

Attach special condition:

Batch number:

Effective date:

GL effective date:

GL year/period:

Results

Records selected:

Records printed:

Records posted:

Payment Entry

The following changes apply to the Payment Entry program.

Miscellaneous Cash Receipts

When the Print GL Accounts check box is selected on the Completing Receipt screen, the program includes the project string and the project description when printing miscellaneous cash receipts and printing validations.

Completing Receipt 2046

Payment Entry - Munis > Bill Information > Miscellaneous Receipts > Completing Receipt 2046

Complete Receipt

Last receipt for customer

Payment method: 1 - CHECK

Check/reference #: 123456

Add'l payment ref:

Receipt option: 3 - INDIV & SUMMARY

Receipt copies: 1

Indv. receipt format: RCTMS40 - RECEIPT-MS-40WIDE

Printer: display

Print GL accounts

Validate

Effective date: 09/26/2013

Total this receipt:

Total for customer:

Reference:

Paid by customer #: 0

Paid by reference: CUSTOMER

Total remitted: 3,000.00

Change due: .00

Enter NSF check data

More Options Continue

MISCELLANEOUS PAYMENT RECPT#: 2046
MUNIS
370 U.S. Route 1
Yarmouth MA 04103

DATE: 09/26/13 TIME: 09:35
CLERK: bbrandle DEPT:
CUSTOMER#: 0

COMMENT:

CHG: IST07 TESTING 0722 3000.00

REVENUE:

1	1000	7650	IST07	2550.00
TECHNOLOGY SOFTWARE				
IST07-F - -				
TESTING 0722				
REF1:		REF2:		
2	1000	4500		450.00
TAX REVENUE				
REF1:		REF2:		

CASH:

1000	1010	3000.00
CASH		

AMOUNT PAID: 3000.00

PAID BY: CUSTOMER
PAYMENT METH: CHECK
123456

REFERENCE:

AMT TENDERED: 3000.00
AMT APPLIED: 3000.00
CHANGE: .00

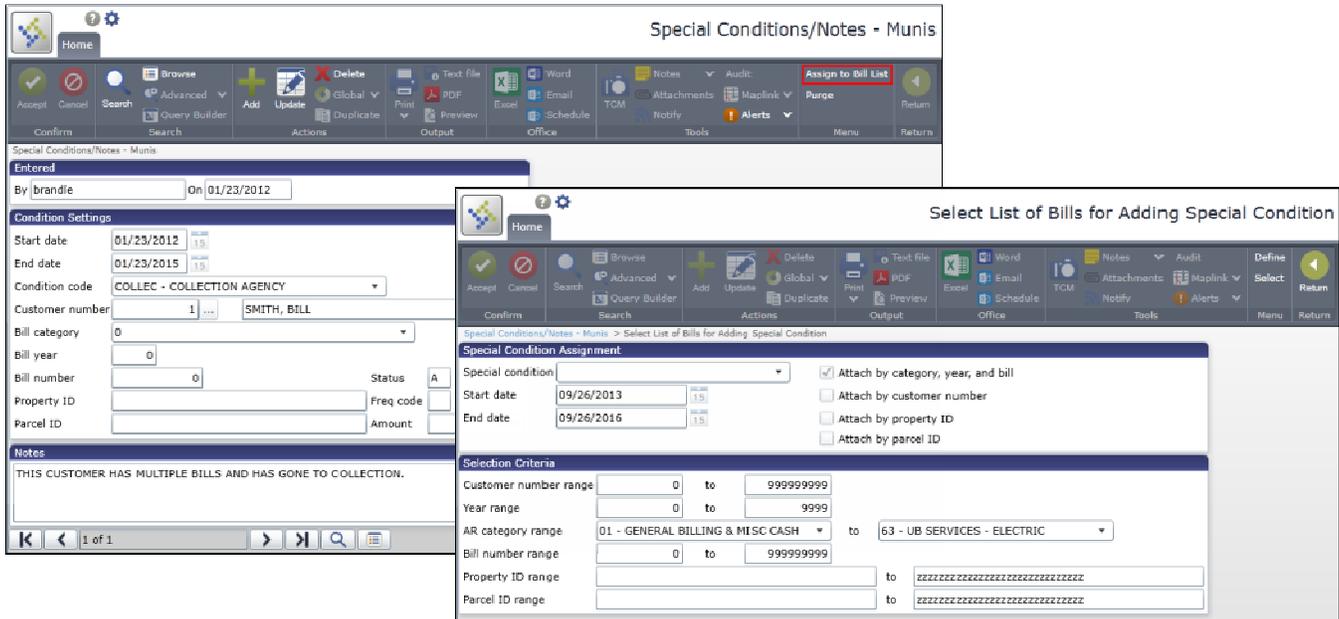
Special Conditions

When the Override Special Conditions Preventing Payment check box is selected on the Account Receivables Roles screen of Roles and the Maintain Special Condition Codes list option selected is Yes or Add/Update Only, the Payment Entry program allows you to override the special conditions preventing payment completion.

The screenshot displays two overlapping software windows. The left window, titled 'Accounts Receivable Roles', shows the 'Role permissions' section with the checkbox 'Override special conditions preventing payment' checked. The right window, titled 'Special Condition Codes - Munis', shows the 'Options' section with the 'Accept payments' checkbox checked. A callout box on the right states: 'Bills with the COLLEC Special Condition Code can accept payments when the Override Special Conditions Preventing Payment check box is selected in Accounts Receivable Roles'. Red arrows indicate the flow of information from the 'Override special conditions preventing payment' checkbox in the first window to the 'Accept payments' checkbox in the second window.

Special Conditions/Notes

When you click the Assign to Bill List button on the main screen of Special Conditions/Notes, the program displays the Select List of Bills for Adding Special Condition screen where you can assign a special condition code to multiple bills.



Animal Licenses Version 10.4

The following change applies to Munis Animal License programs.

Print Notices

When the Include Scanline check box is selected in the Output Options group on the Print Animal License Notices screen, a scan line is printed that can be read by the Payment Entry or Bill Inquiry programs through use of a handheld scanner.

Print Animal License Notices - Munis



Home

Accept Cancel Search Advanced Add Update Delete Global Text file PDF Excel Word Notes Audit Define Select Return

Print Animal License Notices - Munis

Scheduler

Selection criteria

Collection year: _____

Effective date: _____ YEAR

Customer ID range: _____ 0 to 999999999

License # range: _____ 0 to 999999999

Tag type: ALL

Tag # range: _____ 0 to 999999999

Animal type: ALL

Charge range: _____ to _____

Include inactive licenses

Include unpaid licenses only

Include licenses with _____ to _____ YEAR to _____ YEAR

Output options

Order by: Zip code

Records per form: _____

Form code: _____

Update notice dates

Export as XML file

Include scanline

Results

Records selected: _____

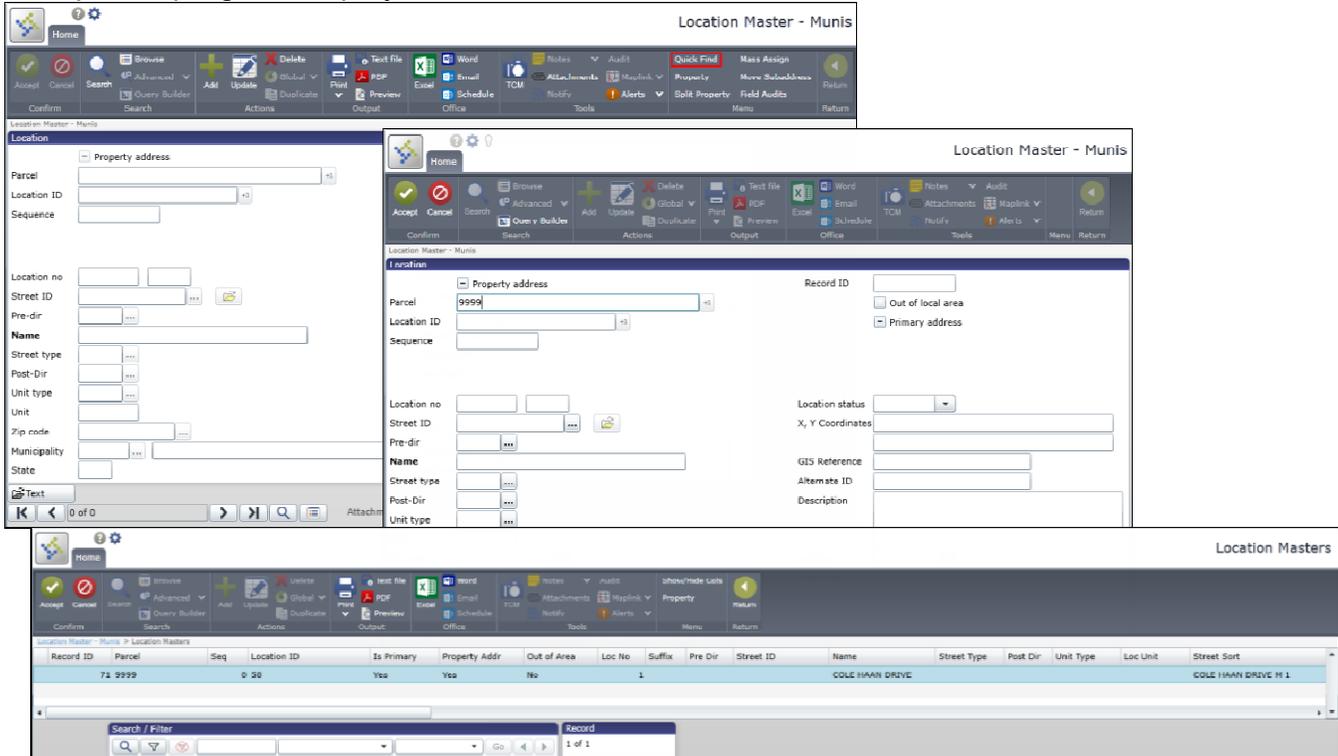
Records printed: _____

Central Property Version 10.4

The following changes apply to Munis Central Property programs.

Location Master and Property Master

When you click the Quick Find button on the main screen, define the field values, and click Accept, the program displays a browse screen for the selected records.



The bottom screenshot displays a table of Location Masters with the following data:

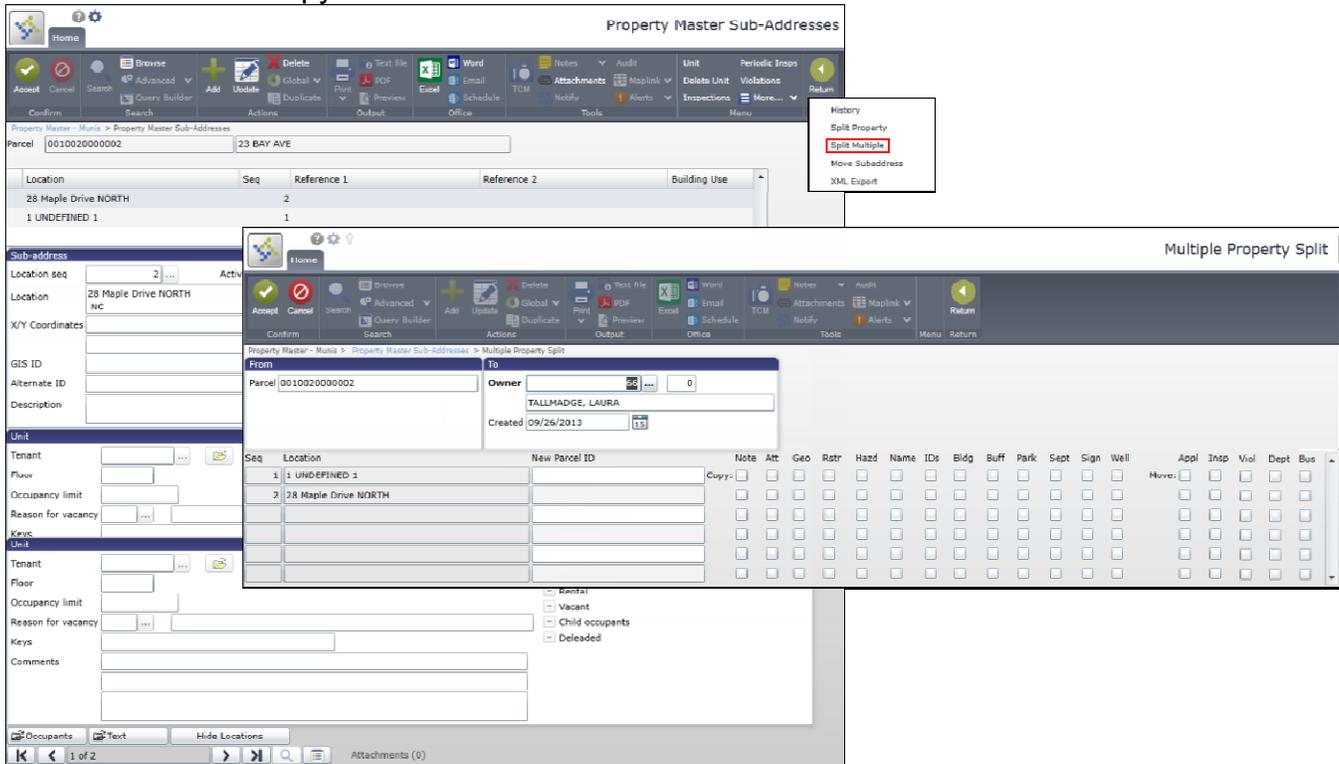
Record ID	Parcel	Seq	Location ID	Is Primary	Property Addr	Out of Area	Loc No	Suffix	Pre Dir	Street ID	Name	Street Type	Post Dir	Unit Type	Loc Unit	Street Sort
74	9999	0	50	Yes	Yes	No	1				COLE HAN DRIVE					COLE HAN DRIVE # 1

Property Master

When you click the Split Property button on the Sub-Addresses screen of Property Master, the Move from Originating Property Master group includes the Applications, Inspections, Complaints/Violations, Dept/Board Reviews, and Businesses check boxes.

The image shows two overlapping screenshots from the Tyler Technologies Property Master application. The top screenshot is the 'Property Master Sub-Addresses' screen, showing a table with columns for Location, Seq, Reference 1, Reference 2, and Building Use. A red arrow points from the 'More...' dropdown menu to the 'Split Property' option. The bottom screenshot is the 'Split Property' dialog box, which is used to move data from one property master to another. It includes fields for 'From' (Parcel: 001002000002, Seq: 2) and 'To' (Parcel ID, Owner: TALLMADGE, LAURA, Created: 09/26/2013). Below these fields are two sections: 'Copy from originating property master' and 'Move from originating property master'. The 'Move from originating property master' section has a red box around it and contains the following checked items: Applications, Inspections, Complaints/Violations, Dept/Board Reviews, and Businesses.

When you click the Split Multiples button on the Sub-Addresses screen of Property Master, the Multiple Property screen allows you to enter the From and To properties and to select the individual items to copy or move.



The image shows two overlapping screenshots from the Property Master software. The top screenshot is the 'Property Master Sub-Addresses' screen, displaying a list of sub-addresses for parcel 001002000002. A context menu is open over the list, with 'Split Multiple' highlighted. The bottom screenshot is the 'Multiple Property Split' screen, which is used to define the 'From' and 'To' properties for splitting. It includes a table for selecting items to be copied or moved.

Property Master Sub-Addresses

Parcel: 001002000002 23 BAY AVE

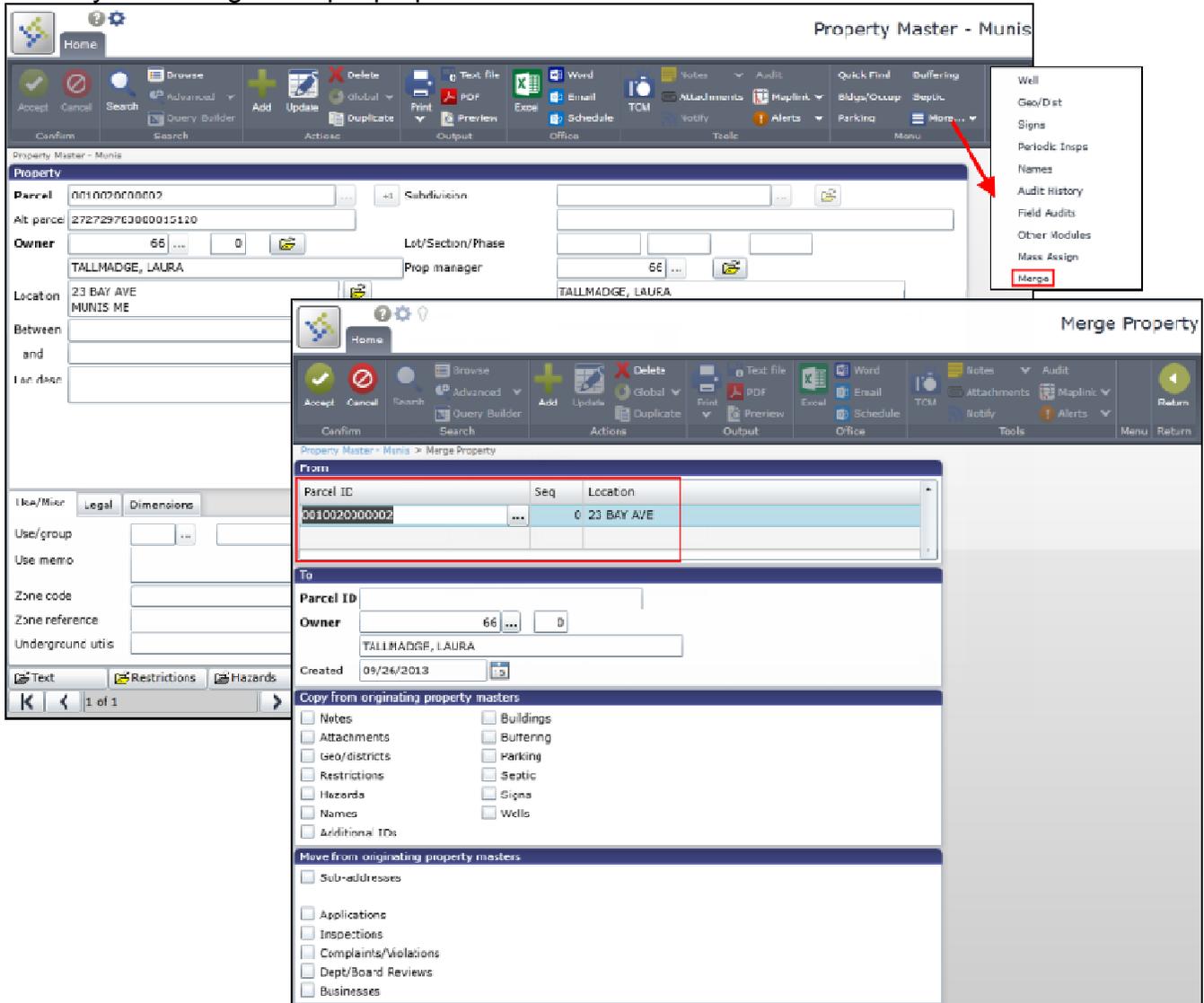
Location	Seq	Reference 1	Reference 2	Building Use
28 Maple Drive NORTH	2			
1 UNDEFINED 1	1			

Multiple Property Split

From: Parcel 001002000002 To: Owner TALLMADGE, LAURA Created 09/26/2013

Seq	Location	New Parcel ID	Note	Att	Geo	Rtr	Hazd	Name	IDs	Blidg	Buff	Park	Sept	Sign	Well	Appl	Insp	Viol	Dept	Bus
1	UNDEFINED 1		Copy	<input type="checkbox"/>																
2	28 Maple Drive NORTH			<input type="checkbox"/>																

When you click the Merge button on the Property Master screen, the Merge Property screen allows you to merge multiple properties.



The image shows two overlapping screenshots of the Tyler Technologies software interface. The top screenshot is the 'Property Master - Munis' screen, and the bottom screenshot is the 'Merge Property' screen.

Property Master - Munis: This screen displays property details for a parcel with ID 001002000002. The owner is TALLMADGE, LAURA. A red arrow points to the 'More...' menu in the top right corner, which includes a 'Merge' option at the bottom.

Merge Property: This screen is used to merge properties. It features a 'From' table with the following data:

Parcel ID	Seq	Location
001002000002	...	0 23 BAY AVE

Below the table, there are fields for 'To' (Parcel ID, Owner, Created) and two sections for selecting items to copy or move from the originating property masters:

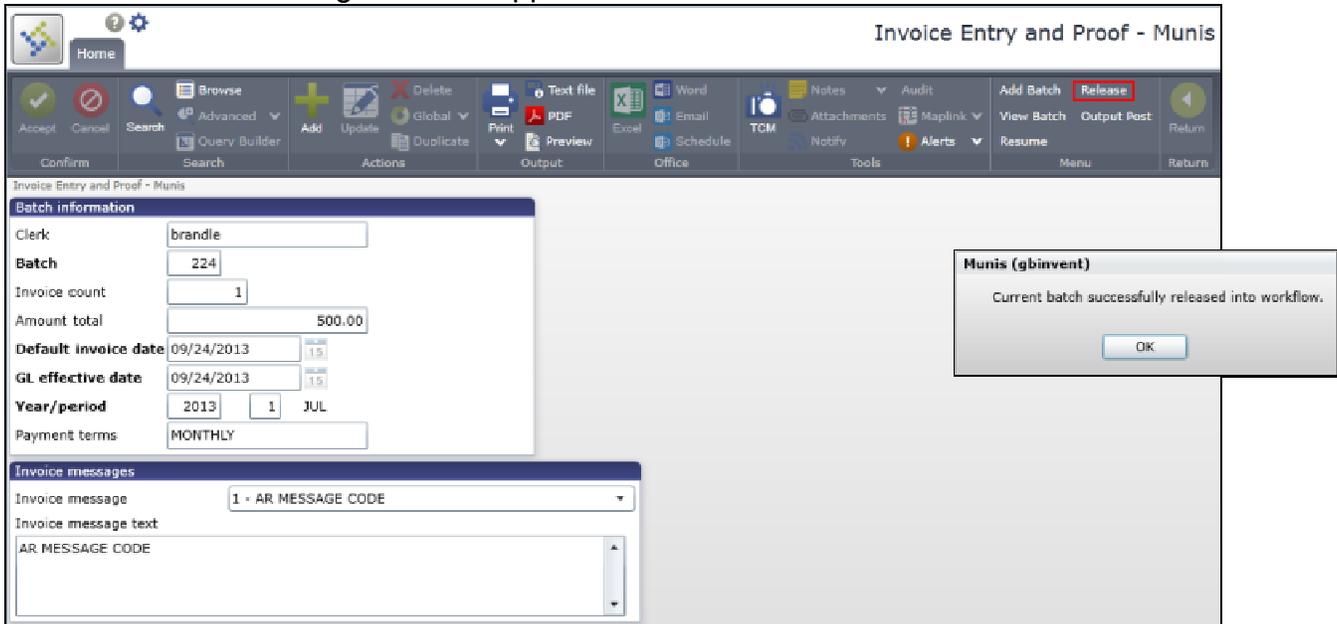
- Copy from originating property masters:**
 - Notes
 - Attachments
 - Geo/districts
 - Restrictions
 - Hazards
 - Names
 - Additional IDs
 - Buildings
 - Buffering
 - Parking
 - Septic
 - Signs
 - Wells
- Move from originating property masters:**
 - Sub-addresses
 - Applications
 - Inspections
 - Complaints/Violations
 - Dept/Board Reviews
 - Businesses

General Billing Enhancements Version 10.4

The following changes apply to Munis General Billing programs.

Invoice Entry and Proof

The Release button is available on the main screen of Invoice Entry and Proof, specifically for users that are submitting workflow approval invoices in a batch.



Recurring Invoices

When the Project Accounting Invoice check box is selected on the Recurring Invoice tab and the invoices are generated through Generate Invoice, the project string from the recurring invoice is transferred to the invoice account record in Invoice Entry and Proof.

The left screenshot shows the 'Recurring Invoices - Munis' interface with the 'Invoice header' section. The 'Project Accounting Invoice' checkbox is checked. The 'AR code' is 'GB - GENERAL BILLING' and the 'Invoice prefix' is '241126'. The 'Recurrence pattern' is set to 'Monthly' with 'Recur every' set to '1' month(s) on day.

The right screenshot shows the 'Invoice detail' section. The 'Charge code' is 'RENTF - RENTAL OF FACILITIES'. The 'Accounts' table is as follows:

Pro	Project Account	Org	Obj	Proj	Description	Total Amt
		1000	4200		GENERAL BILLING REVENUE	100.00
Furn	TST07-F - -	1000	7650	TST07	TECHNOLOGY SOFTWARE	85.00

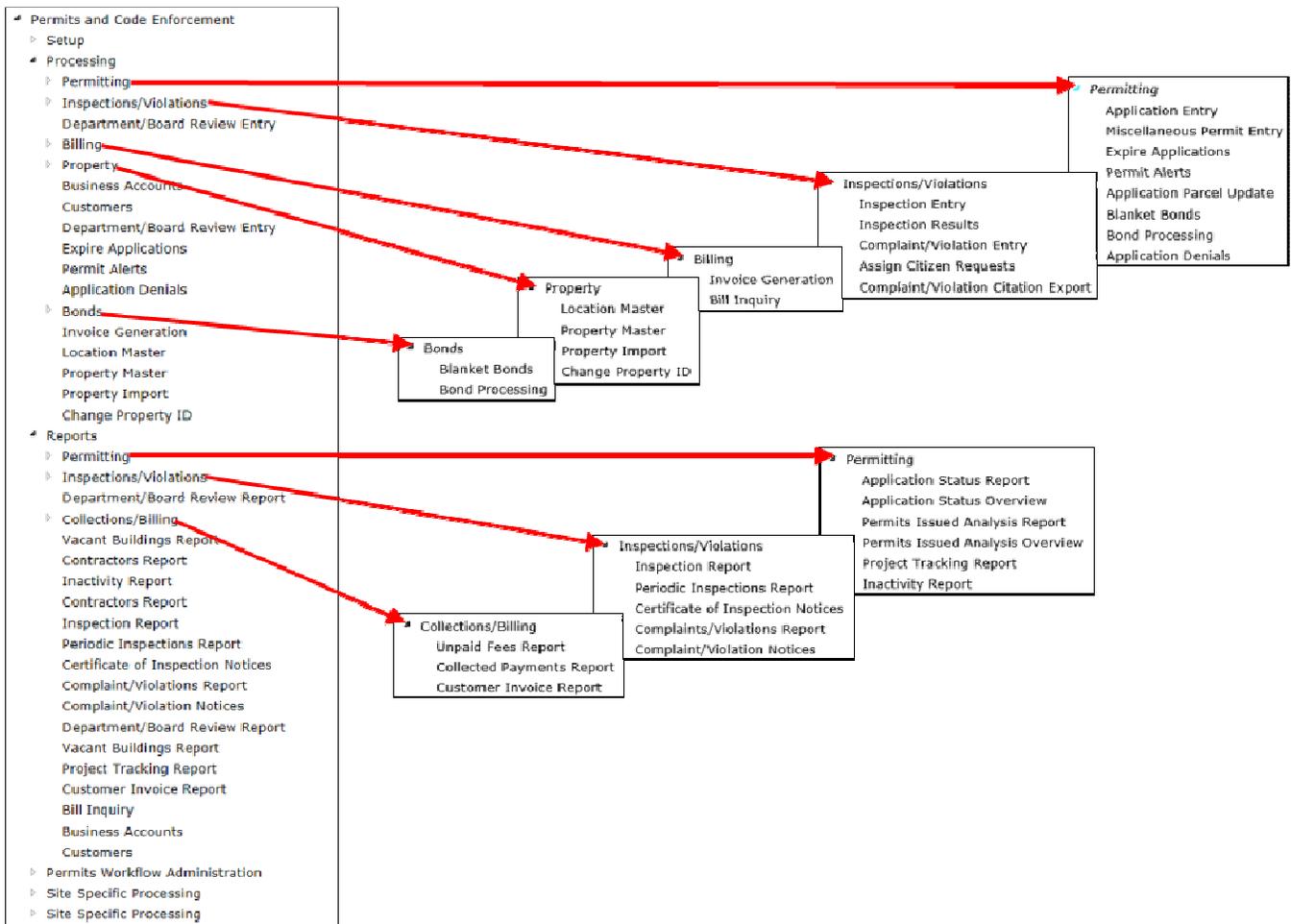
Permits and Code Enforcement Version 10.4

The following changes apply to Munis Permits and Code Enforcement programs.

Permit and Code Enforcement Menu

The Permits and Code Enforcement menu is restructured. The following list includes programs that moved from one menu to another menu:

- The Citizen Request Settings option moved from Processing to Setup > Inspections/Violations.
- The Blanket Bonds and Bond Processing options are located in the Bonds submenu and the Permitting submenu under Processing.
- The Assign Citizen Requests option moved to the Inspections/Violations submenu under Processing.
- The Change Parcel ID - Restricted option, relabeled as Application Parcel Update (which allows you to change the parcel ID on a Permit Application), moved from its own menu to the Permitting submenu under Processing.
- The Business Accounts and Customers options moved from the Reports menu to the Processing menu.



Application Entry, Department/Board Review Entry, Inspection Entry

When you click the Quick Find button on the main screen and complete the required fields, the program displays a browse screen for the selected records.

Application Entry - Munis

Home

Accept Cancel Search Advanced Add Update Global Delete Text File Word Notes Attachments Audit Detail Collect Return

Confirm Search Query Builder Actions Output Office Tools Alerts Quick Find More...

Application Entry - Munis

Application

Status

Department

Project/Activity

Description 1

Description 2

Applicant

Estimated cost Fees effective

Property/Use

Parcel Legal Desc Dates/Misc Project Tracking Permits User Defined

Location ID Record ID

Location

Municipality

Subdivision

Lot/Section/Phase

Between and Location

Preced Buffer

Prior

Quick Find

Home

Accept Cancel Search Advanced Add Update Global Delete Text File Word Notes Attachments Audit Detail Collect Return

Confirm Search Query Builder Actions Output Office Tools Alerts Quick Find More...

Application Entry - Munis > Quick Find

Find

Application

Location

Street

Unit

Parcel 9999 Seq Primary address

Municipality

Application status

Department

Project/Activity

Owner

Contractor

Subdivision

Lot

Proposed use

Proposed trans

Proposed flood zone

Location desc

Application date 15

Actual end date 15

Estim start/end 15 15

Status code

Applications

Home

Accept Cancel Search Advanced Add Update Global Delete Text File Word Notes Attachments Audit Show/Hide Cols Overview Return

Confirm Search Query Builder Actions Output Office Tools Alerts Quick Find More...

Application Entry - Munis > Applications

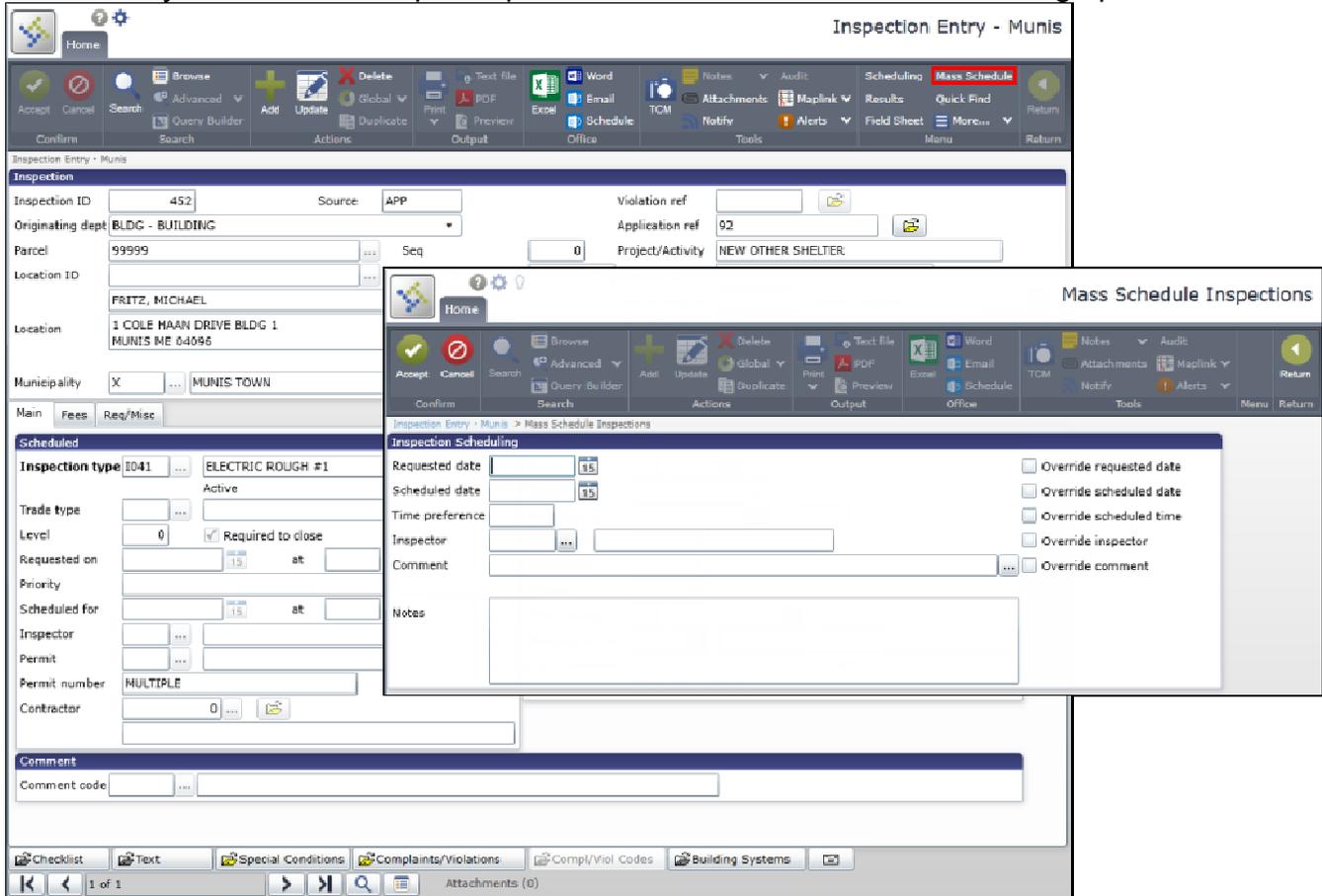
Application Ref	Project/Activity	Location	Lot no	Subdivision	Municipality	Owner
134	NEW AMUSEMENT SOCIAL REC	1 COLE HAAN DRIVE			MUNIS	FRITZ, MICHAEL
138	NEW DUPLEX	1 COLE HAAN DRIVE			MUNIS	FRITZ, MICHAEL
139	NEW SHED	1 COLE HAAN DRIVE			MUNIS	FRITZ, MICHAEL

Search / Filter

Record 1 of 3

Inspection Entry

The Mass Schedule button in Inspection Entry displays a screen where you can enter a single requested date, scheduled date/time, inspector, and comment to be applied to each unscheduled inspection. The Mass Schedule Inspections screen presents a browse screen that allows you to select multiple inspections to be included in the scheduling update.



Inspection Entry - Munis

Home

Accept Cancel Search Advanced Add Update Duplicate Print Preview Output Text file Word Email TCM Attachments Maplink Results Quick Find Return Confirm Search Actions Office Tools Alerts Field Sheet More

Inspection Entry - Munis

Inspection

Inspection ID: 452 Source: APP Violation ref: Application ref: 92

Originating dept: BLDG - BUILDING

Parcel: 99999 Seq: 0 Project/Activity: NEW OTHER SHELTER

Location ID: FRITZ, MICHAEL

Location: 1 COLE MAAN DRIVE BLDG 1 MUNIS ME 04096

Municipality: X MUNIS TOWN

Main Fees Req/Misc

Scheduled

Inspection type: E041 ELECTRIC ROUGH #1

Trade type: Active

Level: 0 Required to close

Requested on: at

Priority: Scheduled For: at

Inspector: Permit: Permit number: MULTIPLE Contractor: 0

Comment

Comment code:

Checklist Text Special Conditions Complaints/Violations Compl/Viol Codes Building Systems

1 of 1 Attachments (0)

Mass Schedule Inspections

Home

Accept Cancel Search Advanced Add Update Duplicate Print Preview Output Text file Word Email TCM Attachments Maplink Results Quick Find Return Confirm Search Actions Office Tools Alerts Field Sheet More

Inspection Entry - Munis > Mass Schedule Inspections

Inspection Scheduling

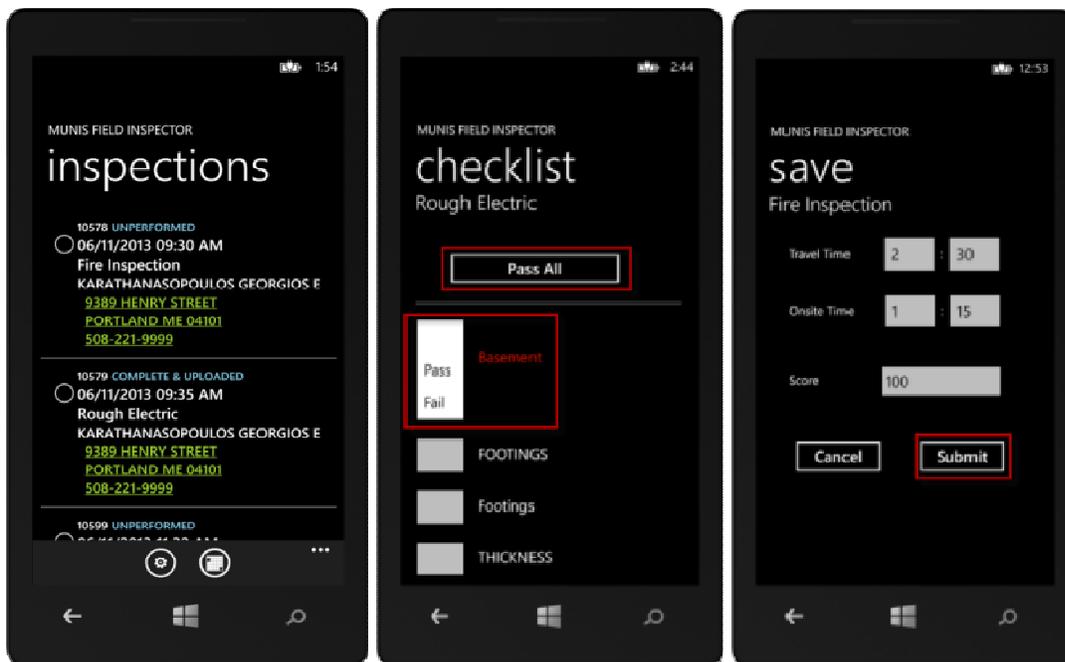
Requested date: Scheduled date: Time preference: Inspector: Comment: Notes:

Override requested date
 Override scheduled date
 Override scheduled time
 Override inspector
 Override comment

Munis Field Inspector Phone Application

The Munis Field Inspector phone application is available from the Microsoft Windows 8 App Store. This mobile application allows you to complete a field inspection checklist, as well as manage property photographs and inspection notes, while on-site at an inspection location. When you complete the inspection checklist, enter the Pass or Fail indicator, and finalize the inspection, the data automatically transfers to your organization's Munis database. If you do not have internet access at the time the inspection is completed, the data is stored until internet access is available.

Note: This app requires a valid login to your Munis database. Once you have downloaded the app, contact osdba@tylertech.com for connectivity assistance.

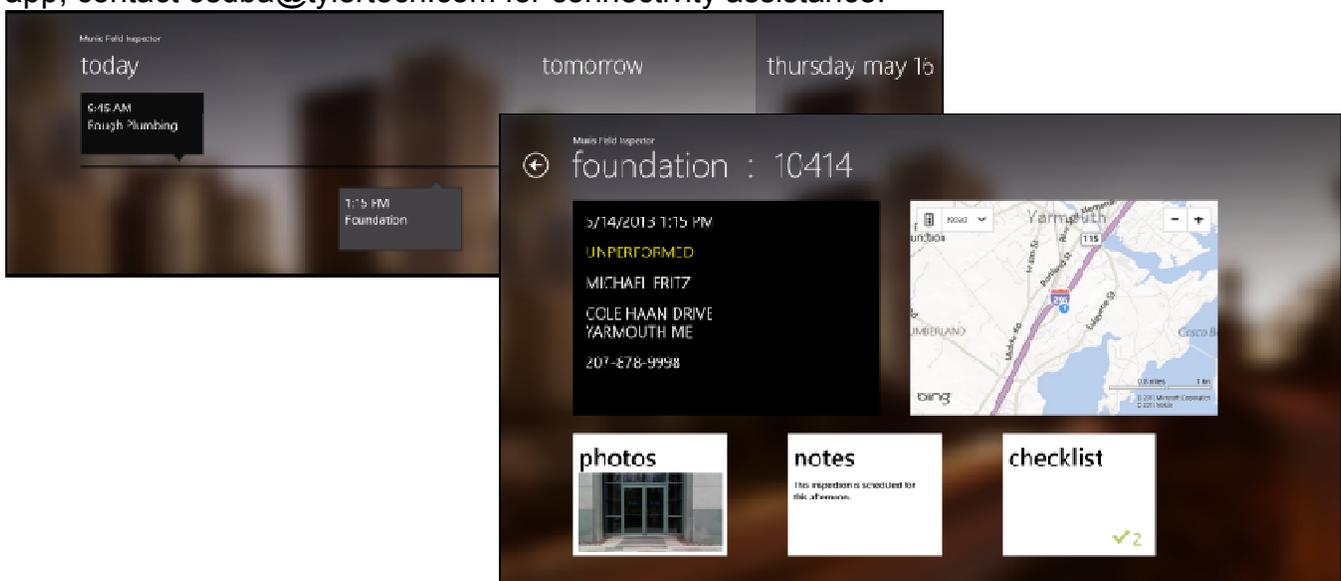


Please refer to the [Munis Field Inspector Application – Windows 8 Phones](#) document in the Munis KnowledgeBase for more information about the application.

Munis Field Inspector Tablet Application

Munis Field Inspector is available from the Microsoft Windows 8 App Store. This mobile application allows you to complete a field inspection checklist, as well as manage property photographs and inspection notes, while on-site at an inspection location. When you complete the inspection checklist, enter the Pass or Fail indicator, and finalize the inspection, the data automatically transfers to your organization's Munis database. If you do not have internet access at the time the inspection is completed, the data is stored until internet access is available.

Note: This app requires a valid login to your Munis database. Once you have downloaded the app, contact osdba@tylertech.com for connectivity assistance.



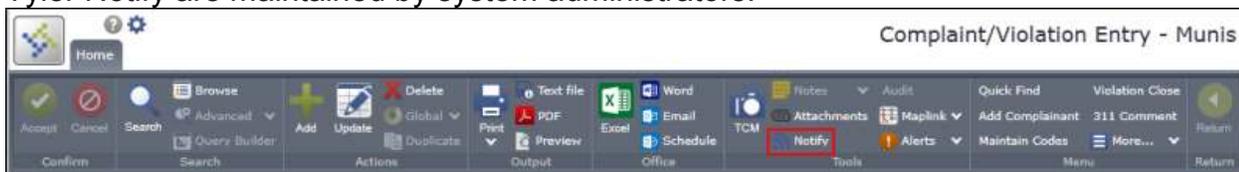
Please refer to the [Munis Field Inspector Application – Windows 8 Tablet](#) document in the Munis KnowledgeBase for more information about the application.

System Administration - Revenue Roles Version 10.4

Module	Field Name	Description
General Billing		
	View Others Invoices	When the View Other's Invoices check box is selected, you can review all invoices; when the check box is cleared, other invoices are not displayed.
	Modify Others' Invoices	When the Modify Other's Invoices check box is selected, you can update the Proof Header and add, delete, and update invoice lines in the Proof Detail; when the check box is cleared, you do not have access to other invoices.
Permits and Code Enforcement		
	Add Permit Applications Update Permit Applications Delete Permit Applications	These three check boxes replace the single Maintain Permit Applications check box available in previous Munis versions. These check boxes assign permissions according to the specific actions of adding, updating, or deleting applications. The default value for these check boxes is not selected (No). For existing records, the value for the Update Permit Applications check box is assigned according to the value of the previous Maintain Permit Applications check box.

Tyler Notify Version 10.4

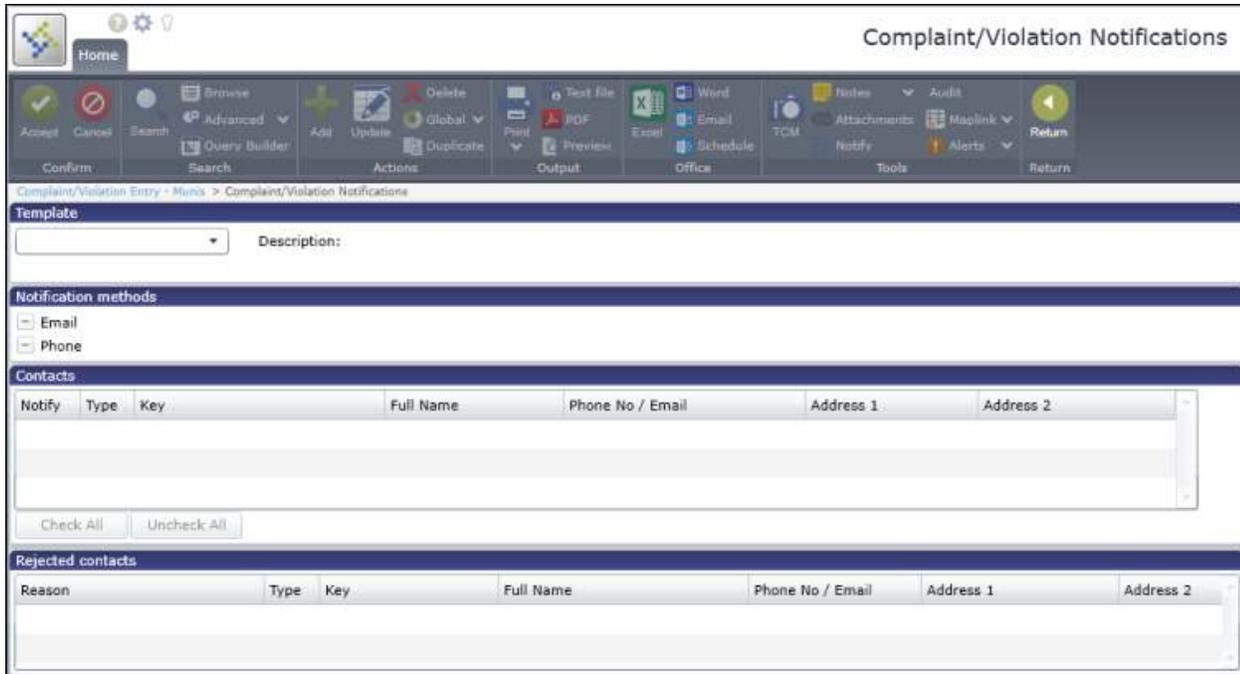
Munis is integrated with Tyler Notify to provide automated electronic notifications through telephone calls or emails. This feature requires that you purchase and install Tyler Notify. Once installed, the connection to Tyler Notify must be configured by entering the Tyler Notify base URL and Tyler Notify Munis Integration URL on the Application Integration screen of the Munis Site Settings program. Templates and message content for programs enabled to use Tyler Notify are maintained by system administrators.



The following Munis Revenues programs are enhanced with Tyler Notify in version 10.4:

- Business Licenses
 - Inactivate Expired Licenses
- Permits and Code Enforcement
 - Complaint/Violation Entry
 - Complaint/Violation Notices
 - Inspection Entry

When you click the Notify button in the Tools group of a program, the Notification screen displays. The Notification screen provides a predefined template and the notification methods to send the message. If the customer record has a telephone number and an email address, the customer receives the notification by email and by telephone.

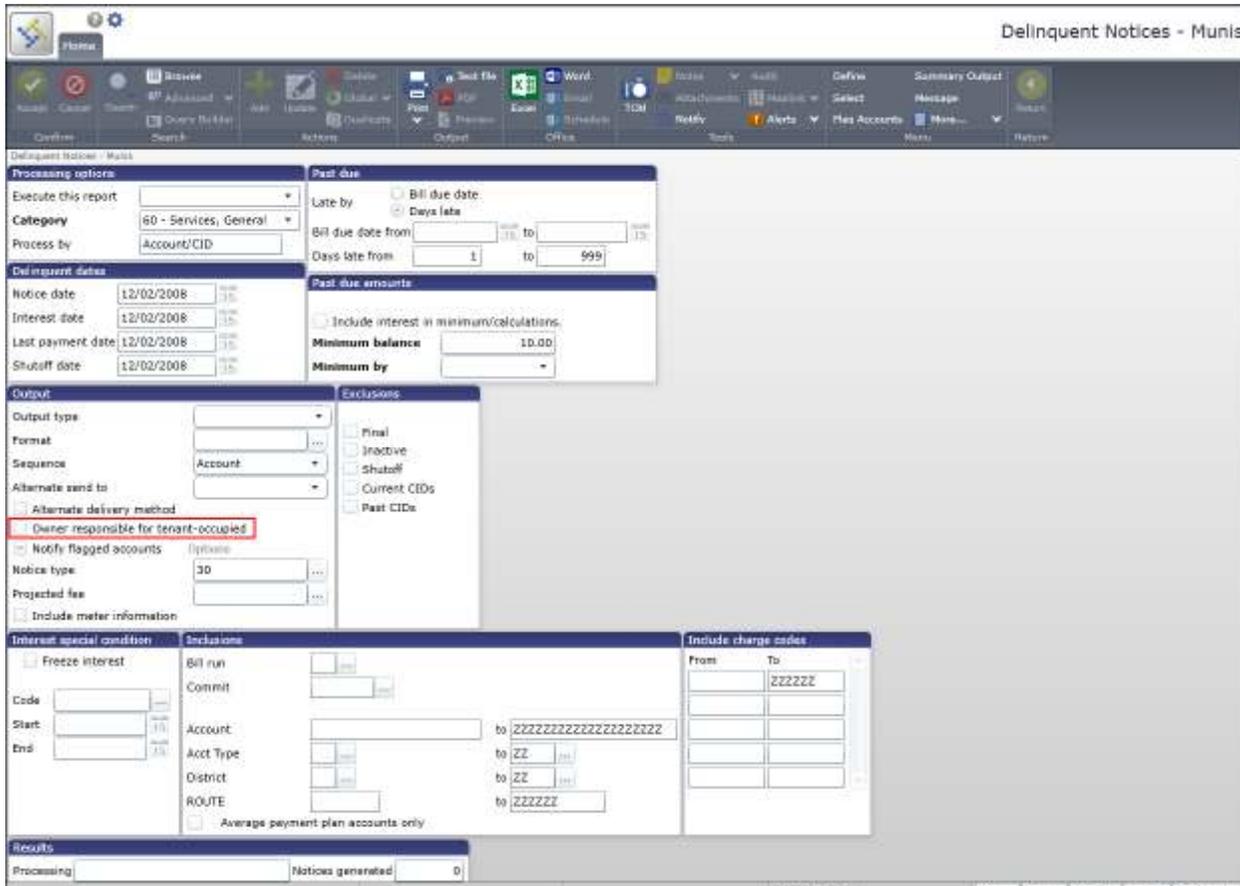


Utility Billing – CIS Version 10.4

The following changes apply to Munis Utility Billing – CIS programs.

Delinquent Notices, Cutoff Process

The Delinquent Notices and Cutoff Process programs provide the option for sending delinquent notices to the tenant's owner account. In the Delinquent Notices program, the Owner Responsible for Tenant-occupied check box is available.

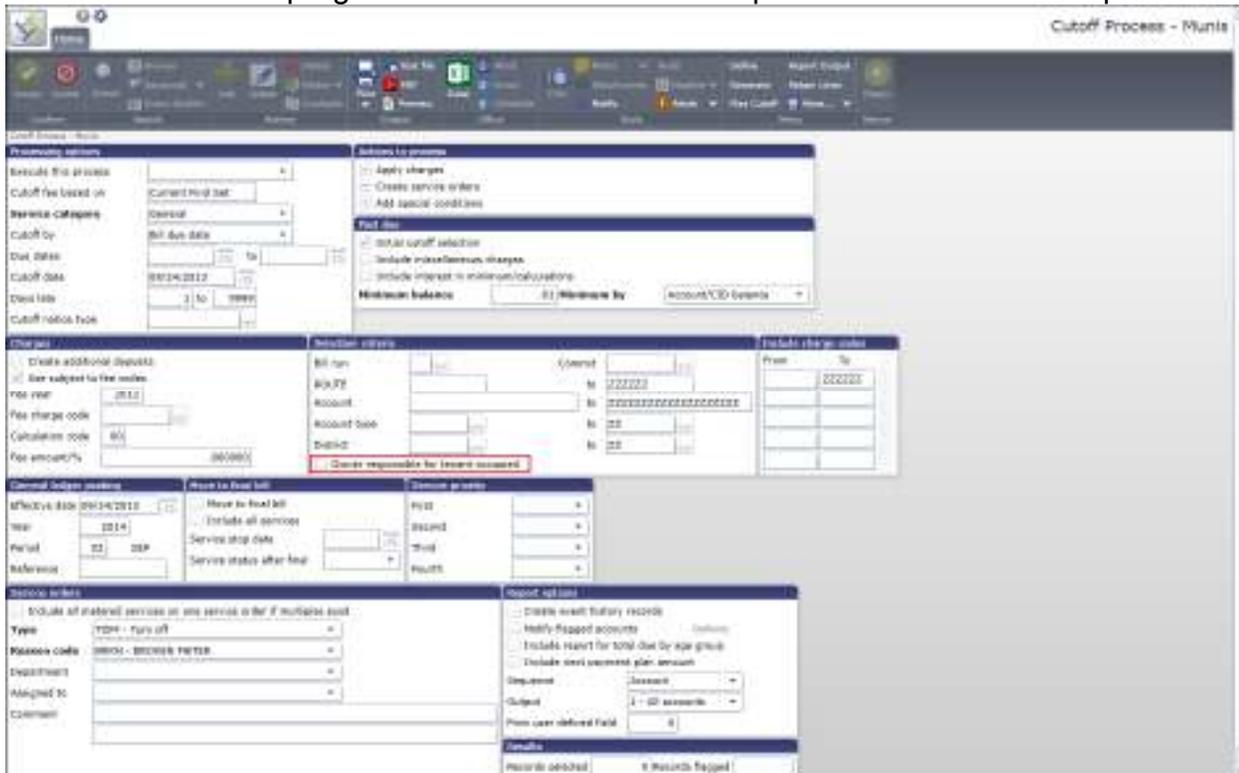


The screenshot shows the 'Delinquent Notices - Munis' application window. The 'Owner responsible for tenant-occupied' checkbox is highlighted with a red box. The interface includes various configuration panels for processing options, dates, output, and exclusions.

When you select this check box, access to the Alternate Send To list is restricted. In addition, this check box, if selected, causes one of the following outcomes for the XML file generated:

- If the delinquent customer does not have an owner on the account, or the customer is the actual owner on the account, the program generates the new XML fields, but does not include values for them.
- If the delinquent customer does have an owner on the account and the owner does not live in the defined city, the program generates the new XML fields, indicating that the owner does not live in the city and providing the owner's contact information.
- If the delinquent customer does have an owner on the account and the owner lives in the defined city, the program generates the new XML fields, indicating that the owner does live in the city and providing the owner's account and contact information.

The Cutoff Process program includes the Owner Responsible for Tenant-occupied check box.



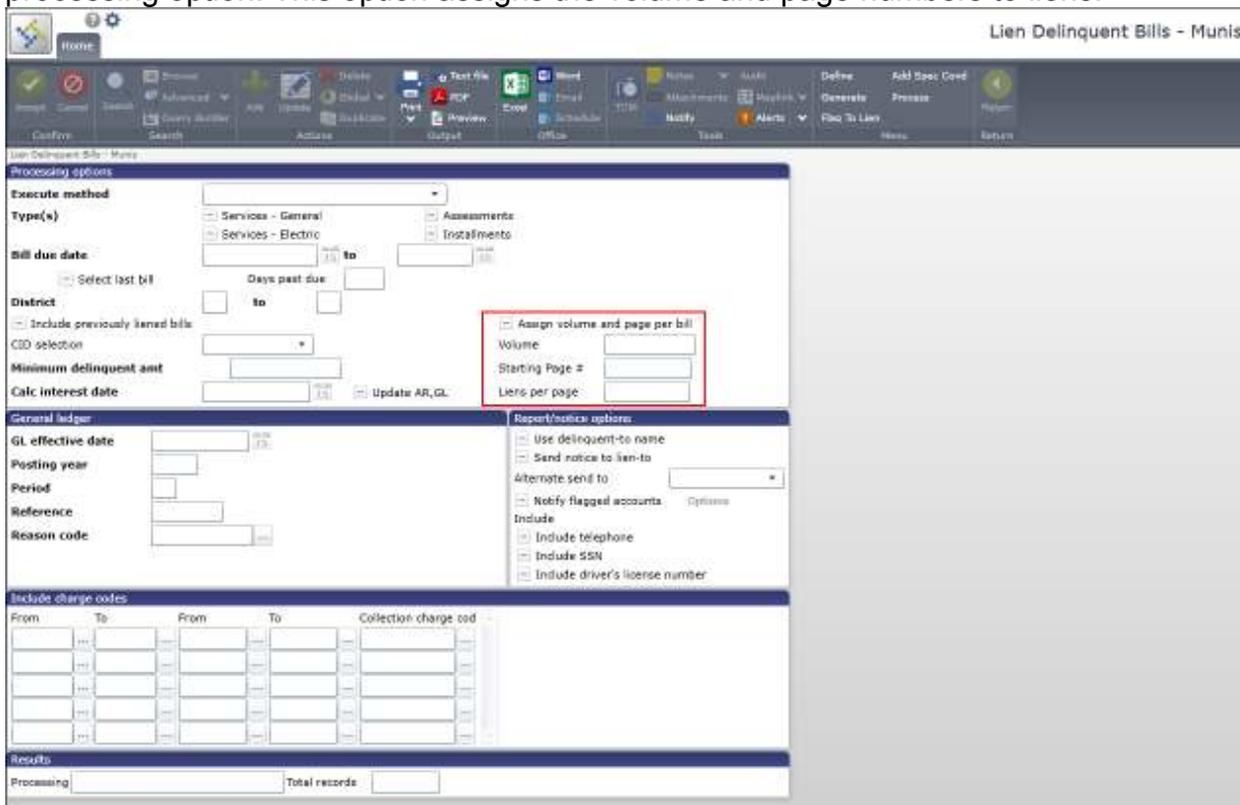
If selected, this check box restricts the Fee Charge Code value to calc code 60–Flat Amount and when the process completes, one of the following results:

- The program generates a cutoff notice for the owner's account (not the tenant's) if the owner's account is also in the defined city.
- If the owner's account is not in the defined city, the program clears the tenant account from the cutoff process records.
- If the CID is the owner on the account, then the program results are standard cutoff process results with no changes.

For delinquent notice processing, event history records are created for owner accounts, and for cutoff processing, event history records are created for the owner and tenant accounts, as appropriate.

Lien Delinquent Bills

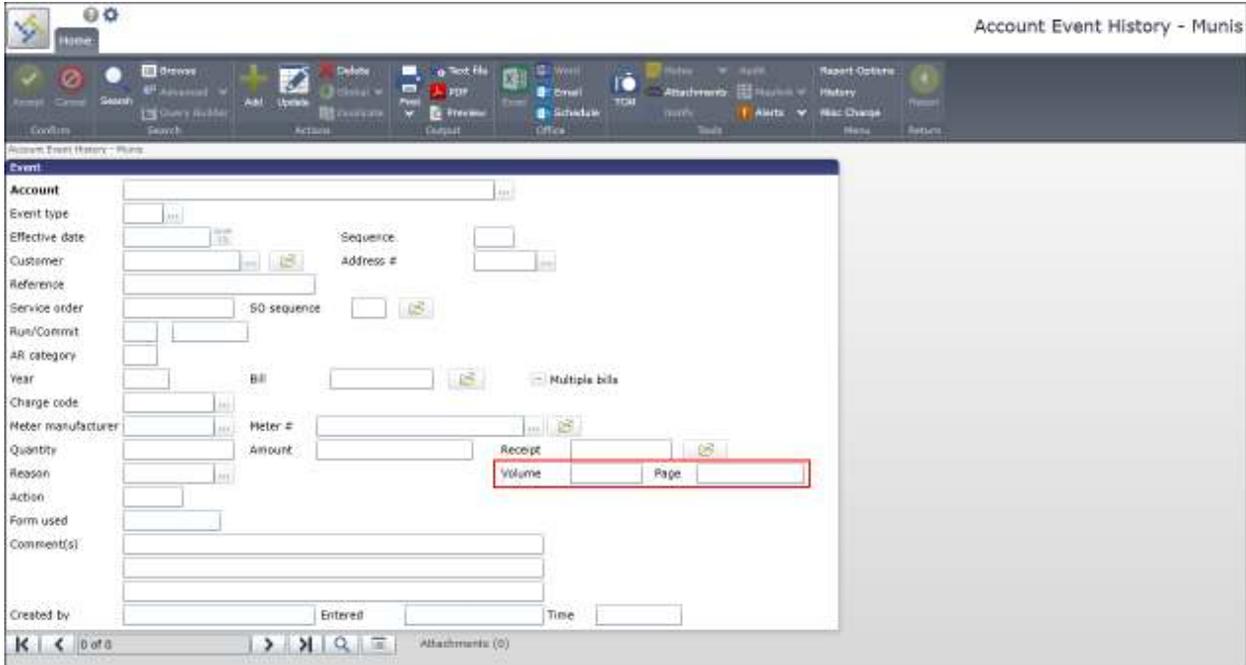
The Lien Delinquent Bills program includes the Assign Volume and Page Per Bill check box processing option. This option assigns the volume and page numbers to liens.



The screenshot shows the 'Lien Delinquent Bills - Munis' software interface. The 'Assign volume and page per bill' checkbox is highlighted with a red box. Below it are input fields for 'Volume', 'Starting Page #', and 'Liens per page'. The interface also includes sections for 'Execute method', 'General ledger', 'Report/notice options', and 'Include charge codes'.

Using a single volume number, a starting page number, and a standard number of liens per page, the program assigns these values to all the liens processed. The Microsoft Word and Microsoft Excel output files include the volume and page values.

When the event history type code is TDT—Transfer Delinquent to Tax, the Account Event History program includes the Volume and Page boxes and creates an event history record for each amount per lien bill.



MapLink

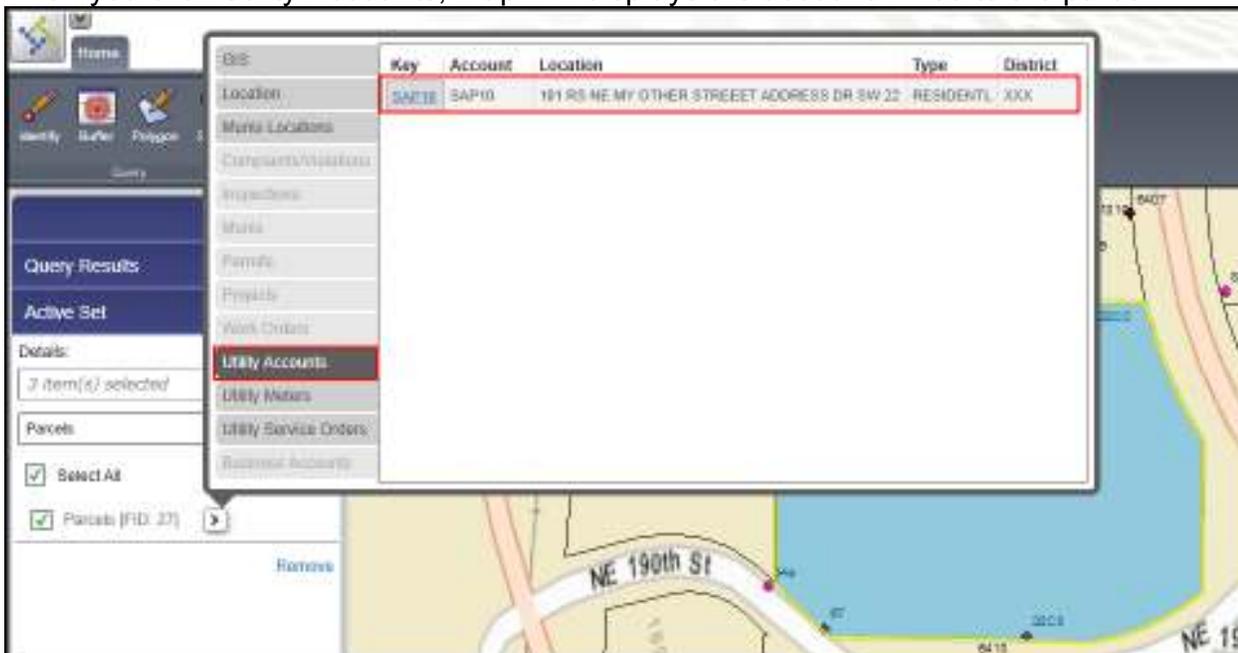
Munis MapLink for Utility Billing–CIS includes the Utility Accounts, Utility Meters, and Utility Service Orders on the Detail Items list for the active set of records.



When you select one of these options, MapLink adds the details to the list of parcel information for the active set.



Selecting one of these options provides the applicable details for the parcel. For example, when you click Utility Accounts, MapLink displays the account linked to the parcel.

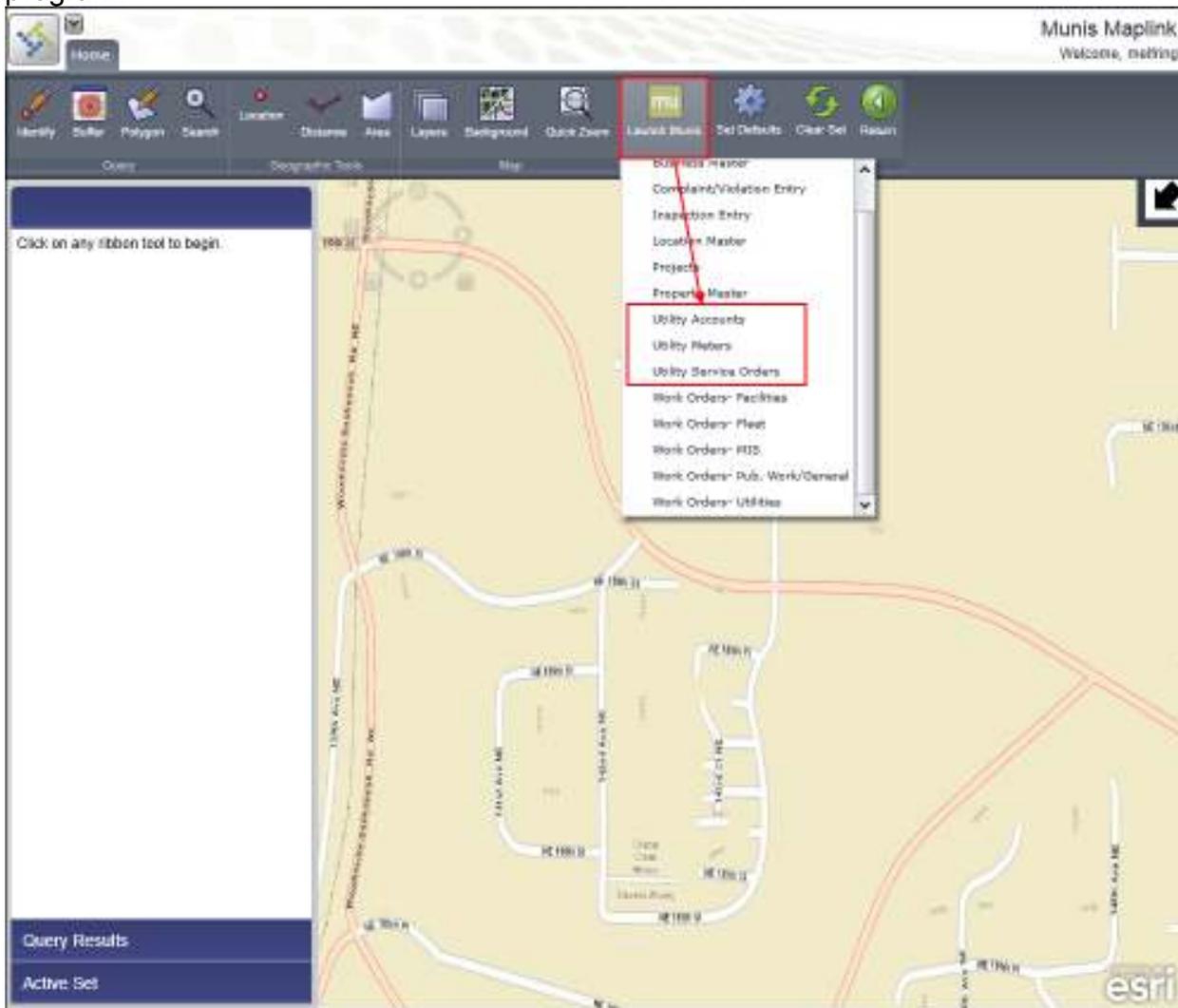


Clicking the Key hyperlink opens the Utilities program with the associated account as the active record.

If you select Utility Meters, MapLink provides a list of meters for the parcel and the Key hyperlink opens the Meter Inventory program with the selected meter as the active record.

If you select Utility Service Orders, MapLink provides a list of service orders attached to the parcel and when you click the Key hyperlink for a specific service order, the Munis Service Order/Print program opens with the selected service order as the active record.

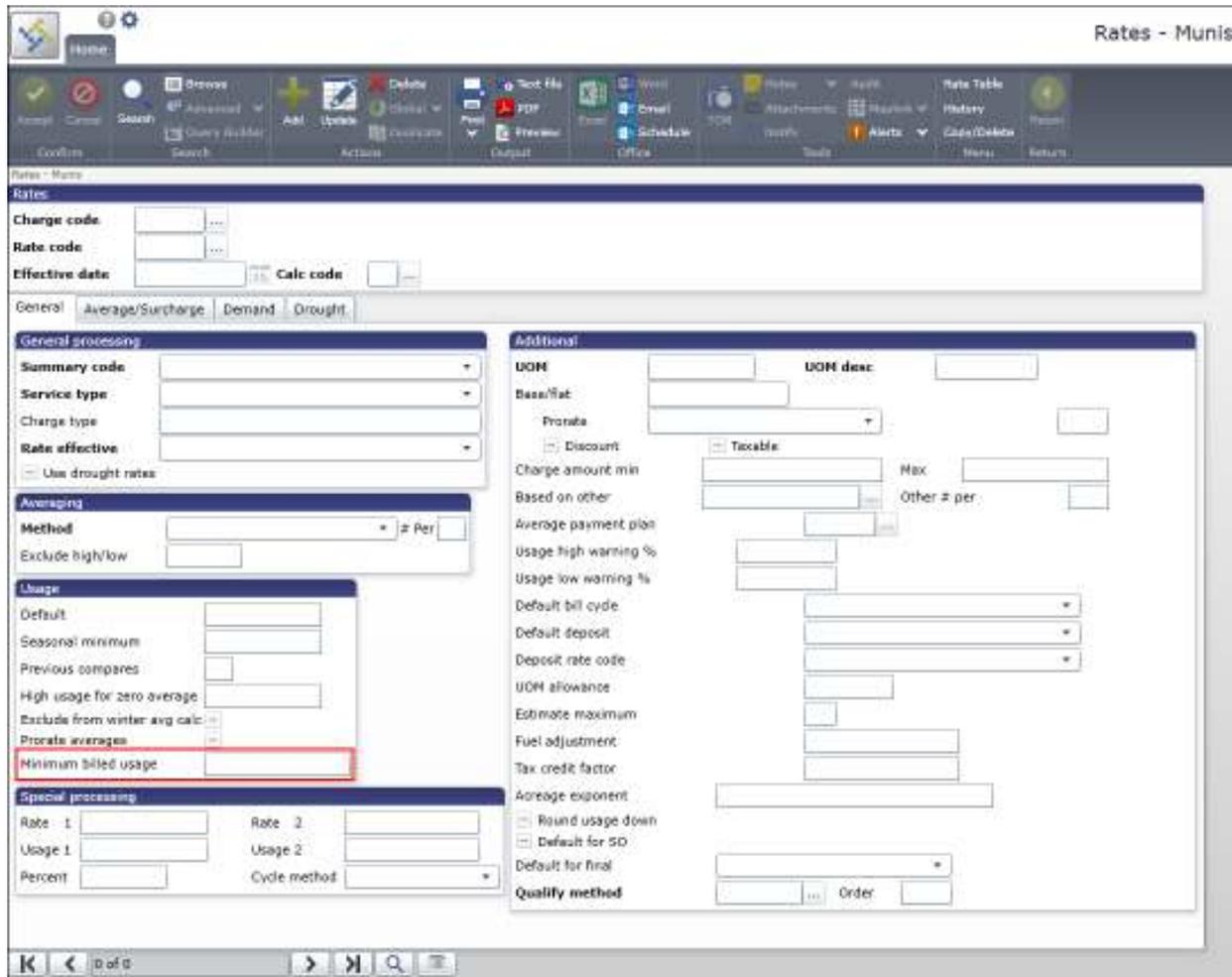
The Launch Munis ribbon option includes the Utility Accounts, Utility Meters, and Utility Service Orders options, which provide direct access to the selected programs in Munis. When the Munis program opens, the MapLink active set is also the selected active set for the Munis program.



Rate Masters

Minimum Usage

The Rate Masters program includes the Minimum Billed Usage box, which defines a minimum usage value. This minimum usage value becomes the billed usage whenever actual usage is less than the defined value. During the billing process the Minimum Billed Usage value is evaluated against the actual usage. If the actual usage falls below the minimum, the billed usage is set to the defined minimum usage.



The screenshot shows the 'Rates - Munis' application window. The 'Rates' section is active, displaying various configuration options. The 'General processing' section includes fields for Summary code, Service type, Charge type, Rate effective, and a checkbox for 'Use drought rates'. The 'Averaging' section includes Method, Exclude high/low, and Usage settings. The 'Usage' section includes Default, Seasonal minimum, Previous compares, High usage for zero average, Exclude from winter avg calc, Prorate averages, and **Minimum billed usage** (highlighted with a red box). The 'Special processing' section includes Rate 1, Rate 2, Usage 1, Usage 2, Percent, and Cycle method. The 'Additional' section includes UON, UON desc, Base/fat, Prorate, Discount, Taxable, Charge amount min, Max, Based on other, Average payment plan, Usage high warning %, Usage low warning %, Default bill cycle, Default deposit, Deposit rate code, UON allowance, Estimate maximum, Fuel adjustment, Tax credit factor, Averaging exponent, Round usage down, Default for SD, Default for final, and Qualify method.

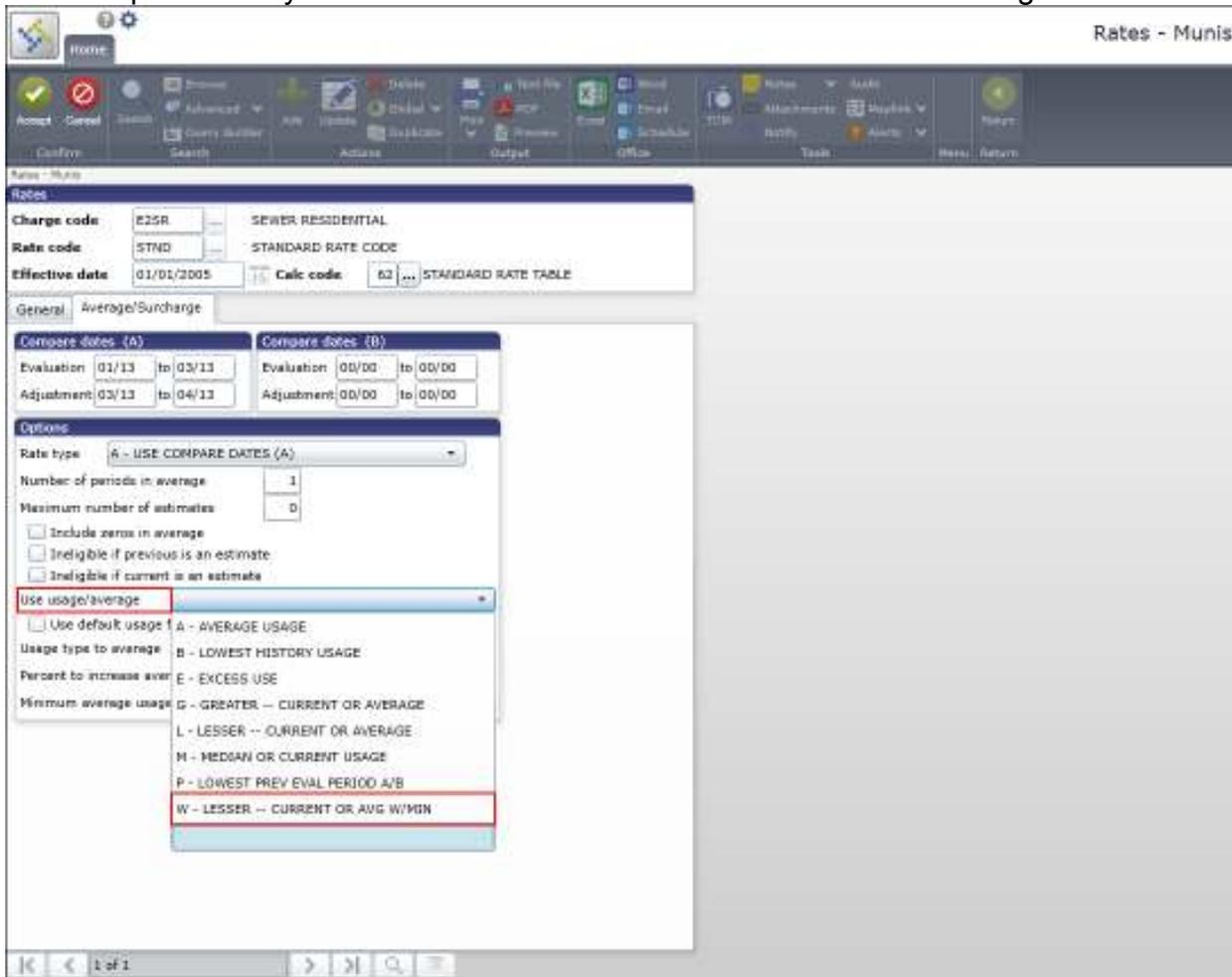
The Calculate Charges and Bill Adjustments programs are updated so that when billed usage is determined, the usage minimum from the Rate Masters program is evaluated against the actual usage and replaces the actual usage as the billed usage when it is less. The comparison of actual usage to a usage minimum only occurs when there is a minimum usage value defined in the Rates Master program.

The UB Original Bill Inquiry program includes the Billed Usage column in the Detail table. In addition, Account Customer Inquiry, Consumption History/Inquiry, Account History/Inquiry

Report programs display both billed and actual usage. Each will display the minimum usage as the billed usage whenever actual usage is less.

Winter Quarter Calculations

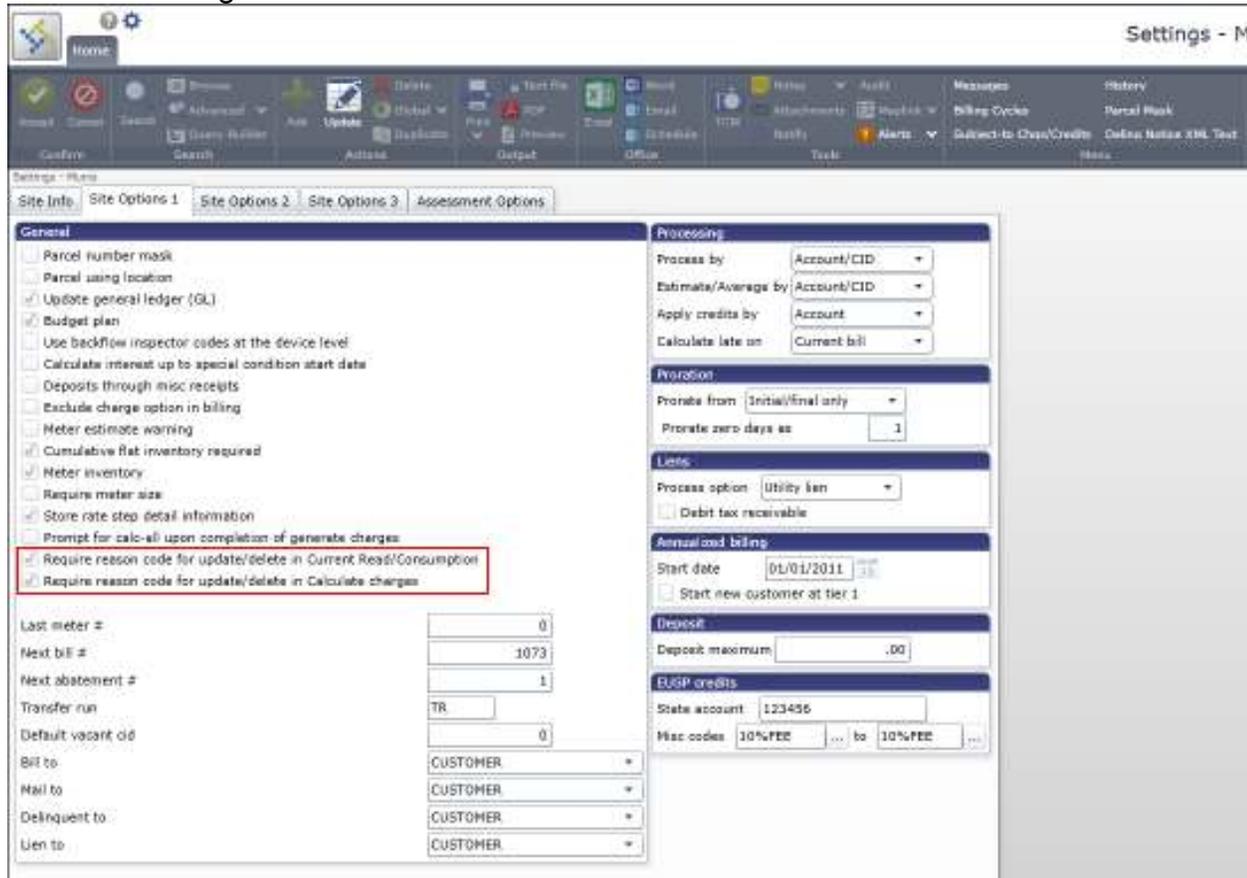
For winter quarter sewer calculations, the Rate Masters program includes the W-Lesser--Current or Avg w/Min field value option for the Use Usage/Average list on the Average/Surcharge tab. This calculation is based on the lesser of the current or average usage from the prior fiscal year if the account has more than three nonzero usages.



For correct processing, the Minimum Number of Reads value on the Site Options 2 tab in the Settings program tab must be three (3) and the Include Zeros in Average check box on the Average/Surcharge tab in the Rate Masters program must be cleared.

Settings, Current Read/Consumption, Calculate Charges

The Site Option 1 tab in the Settings program contains the Require Reason Code for Update/Delete in Current Read/Consumption and Require Reason Code for Update/Delete in Calculate Charges check boxes.



If you select either or both of these check boxes, users must enter a reason code when updating or deleting data in the respective program. To use this functionality, you must also create the following Utility Billing miscellaneous codes:

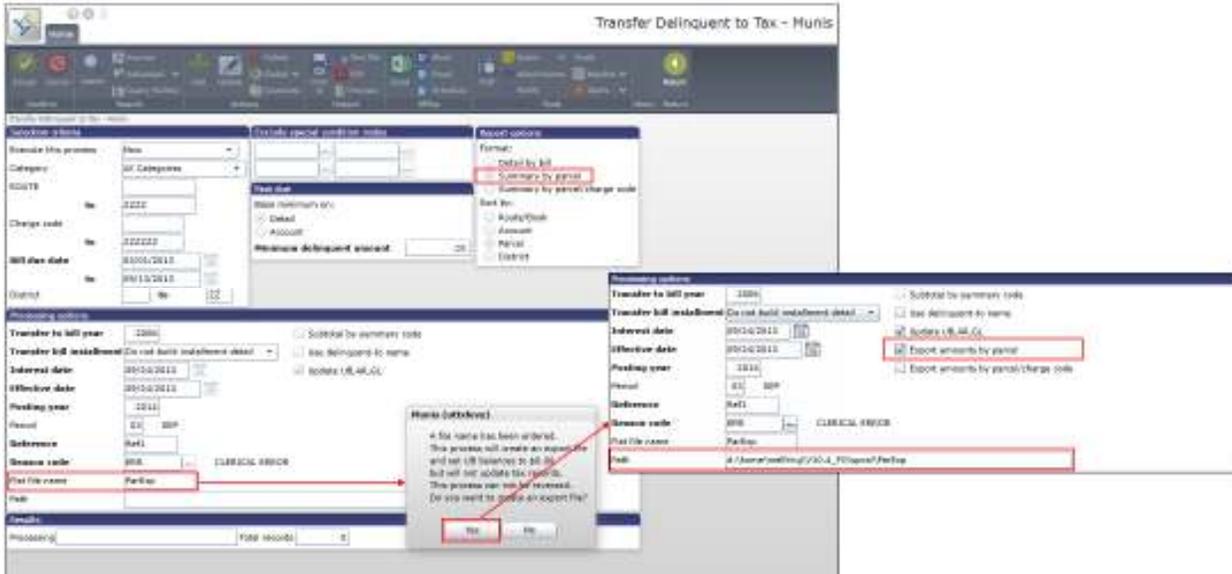
- Calculate Charges Reasons Codes for the code type CCR
- Current Read/Cons Reason Codes for the code type CRC

Transfer Delinquent to Tax

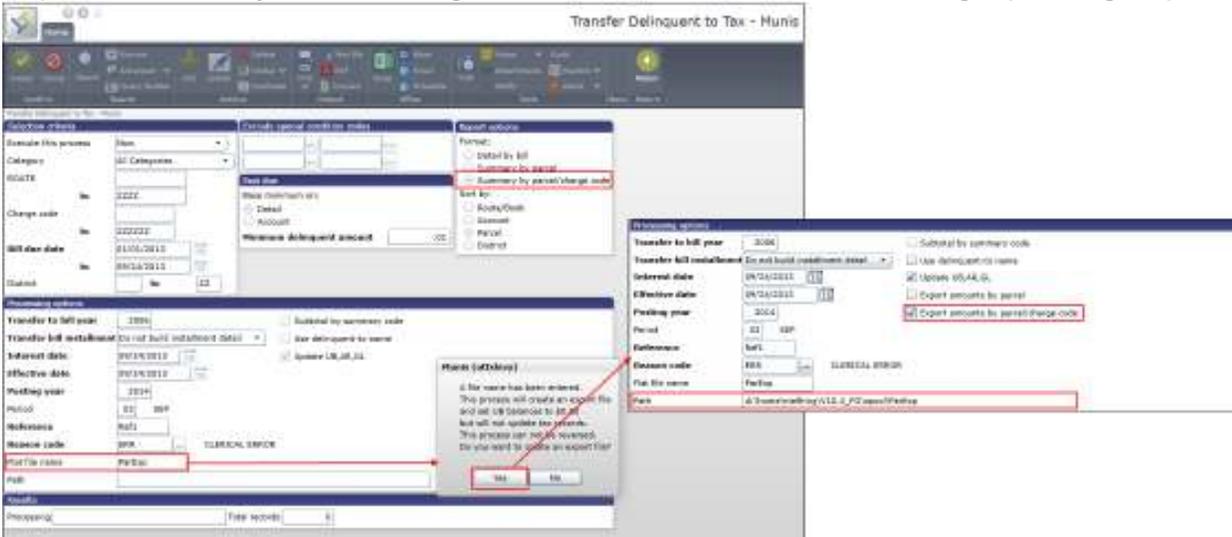
The Transfer Delinquent to Tax program provides an option to create an export file that groups amounts by parcel or parcel/charge code if you enter a value in the Flat File Name box.

To create a summary report by parcel, select Summary by Parcel as the Report Option format. In the Processing Options group, enter a value for the Flat File Name box and press Tab. The program displays a File Name message; click Yes and the screen refreshes to complete the

Path box with the path to your spool directory and to include the Export check boxes. Select the Export Amounts by Parcel check box and click Accept to complete the process.



To create a summary report by parcel and charge code, in Report Options, select Summary by Parcel/Charge Code and then follow the same procedure as for the Parcel report, selecting the Export Amounts by Parcel/Charge Code check box in the Processing Options group.



Workflow System Information, Workflow Business Rules

The Workflow System Information Maintenance program (a restricted-access program) includes the Allow Step Level Entry check box on the Process Code tab. If this check box is selected and the Workflow Process Access list in the Munis System Roles program is set to Full, the Workflow Business Rules program accommodates two steps of approvers for the UTB - UB Bill Adjustment business rule.



The two-step process sends an email notification to the first-level approver, and then after the first-level approver approves the workflow item, it sends a follow-up email to the second approver indicating that the second-level approval is now required. Once the second level approval is complete, the second-level approver can post the adjustment.

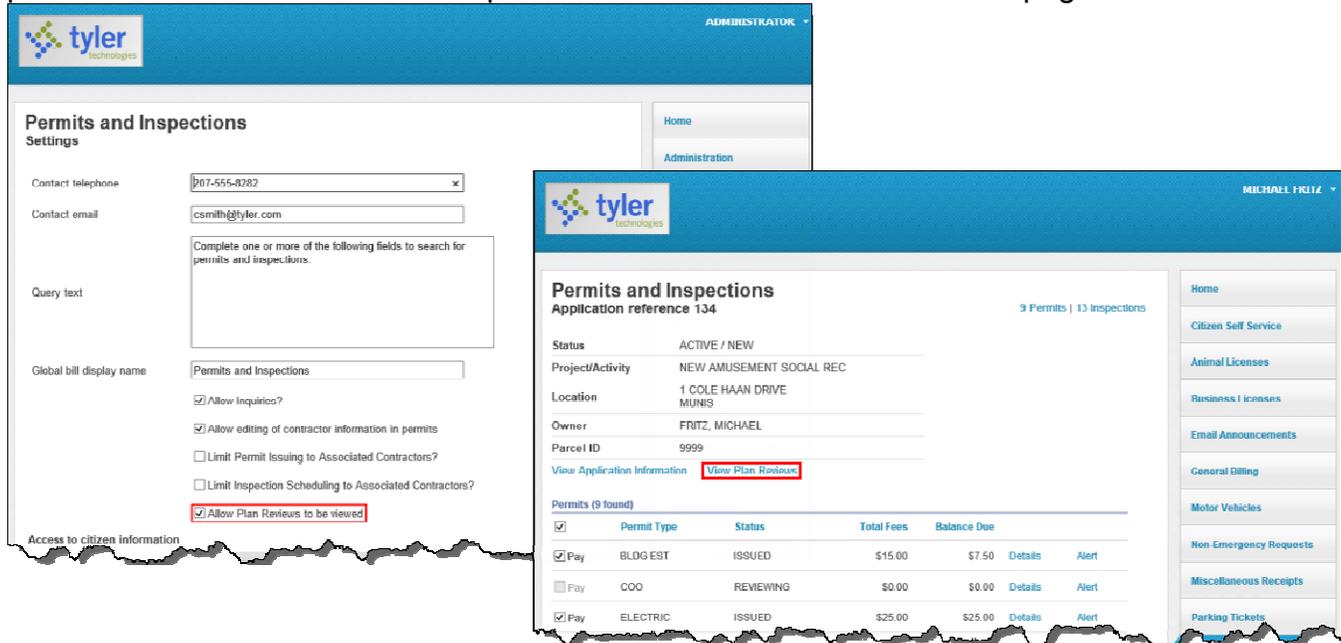
Citizen Self Service Version 10.4

The Munis Self Service programs available for the Revenues product are included in Citizen Self Service (CSS). The following changes apply to Munis Citizen Self Service programs.

Permits and Inspections

View Plan Reviews

When the Allow Plan Reviews to be Viewed check box is selected on the Citizen Administration Permits and Inspections Settings page, the Permits and Inspections Detail page provides the View Plan Reviews option that accesses the Plan Reviews page.



Permits and Inspections Settings

Contact telephone: [207-555-8282]

Contact email: [csmith@tyler.com]

Query text: [Complete one or more of the following fields to search for permits and inspections.]

Global bill display name: [Permits and Inspections]

Allow Inquiries?
 Allow editing of contractor information in permits
 Limit Permit Issuing to Associated Contractors?
 Limit Inspection Scheduling to Associated Contractors?
 Allow Plan Reviews to be viewed

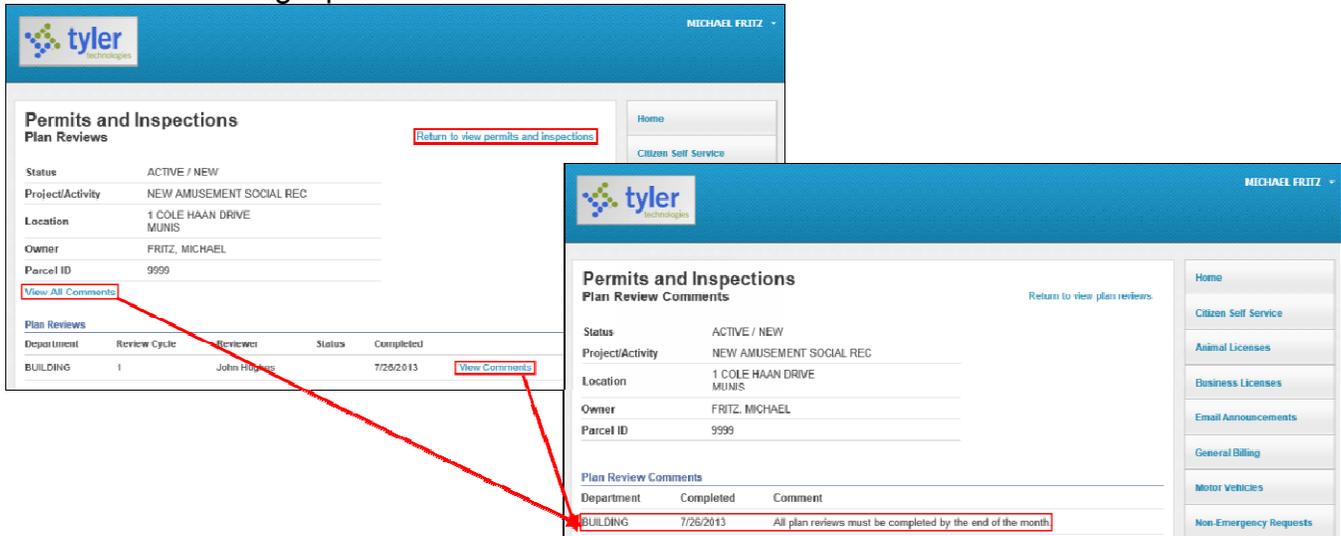
Permits and Inspections
Application reference 134

Status: ACTIVE / NEW
 Project/Activity: NEW AMUSEMENT SOCIAL REC
 Location: 1 COLE HAAN DRIVE MUNIS
 Owner: FRITZ, MICHAEL
 Parcel ID: 9999

[View Application Information](#) **View Plan Reviews**

Permits (9 found)	Permit Type	Status	Total Fees	Balance Due		
<input checked="" type="checkbox"/> Pay	BLDG EST	ISSUED	\$15.00	\$7.50	Details	Alert
<input type="checkbox"/> Pay	COO	REVIEWING	\$0.00	\$0.00	Details	Alert
<input checked="" type="checkbox"/> Pay	ELECTRIC	ISSUED	\$25.00	\$25.00	Details	Alert

On the Plan Reviews page, the Return to View Permits and Inspections option returns you to the previous page. The View All Comments option displays the Plan Reviews Comments page where detailed plan review information is available. The View Comments option displays comments for a single plan review.



Permits and Inspections Plan Reviews

Status: ACTIVE / NEW
 Project/Activity: NEW AMUSEMENT SOCIAL REC
 Location: 1 COLE HAAN DRIVE MUNIS
 Owner: FRITZ, MICHAEL
 Parcel ID: 9999

[View All Comments](#)

Department	Review Cycle	Reviewer	Status	Completed	
BUILDING	1	John Higgins		7/25/2013	View Comments

[Return to view permits and inspections](#)

Permits and Inspections Plan Review Comments

Status: ACTIVE / NEW
 Project/Activity: NEW AMUSEMENT SOCIAL REC
 Location: 1 COLE HAAN DRIVE MUNIS
 Owner: FRITZ, MICHAEL
 Parcel ID: 9999

[Return to view plans reviews](#)

Plan Review Comments

Department	Completed	Comment
BUILDING	7/25/2013	All plan reviews must be completed by the end of the month.

Issue Lower Level Permits

When the Lower Level Issue Required check box in the Munis Permit Types program is selected, the “Requires that lower level permits be issued prior to making payment” message in Citizen Self Service specifies lower level permits must be issued prior to permit fees being collected online.

Permit Types - Munis

Home

Accept Cancel Search Advanced Add Update Delete PDF Email TCM Attachments Maplink List Confirm Query Builder Search Actions Output Office Schedule Notify Alerts

Permit Type

Permit code: POOL Level: 3

Description: POOL Fee use: All fees used

Short description: POOL Stop fee recalc: N

Issuing department: BLDG BUILDING Days to expire: 365

Status: Active Max days to review: 7

Permit category: 0 - OTHER Number of months: 0

Prefix/next number: 0 20037214 Max months extension: 0

Required licenses: Form code: OTHER1 - OTHER PERMIT #1 Collect fees prior to issue: No

Contractor role: POOL POOL CONTRACTOR Collect in cashiering: Yes

Report summary 1: Report summary 2: Work Order Activity: Work Order Template:

Level: 3

Stop fee recalc: N

Days to expire: 365

Max days to review: 7

Number of months: 0

Max months extension: 0

Collect fees prior to issue: No

Collect in cashiering: Yes

Lower level issue required

Workflow required

Allow issue online

Fees

Description	Fee Basis	Fee Rate	Which Sq Feet	Stat Desc
POOL	Square Feet	Per Ring	Impervious Surt	

Attachments (0)

tyler technologies MICHAEL FRITZ

Permits and Inspections

Application reference 143 2 Permits | 1 Inspection

Status: ACTIVE / NEW

Project/Activity: NEW POOL

Location: 1 COLE HAAN DRIVE MUNG

Owner: FRITZ, MICHAEL

Parcel ID: 9999

[View Application Information](#) [View Issue Alerts](#)

Permits (2 found)

<input type="checkbox"/>	Permit Type	Status	Total Fees	Balance Due	
<input checked="" type="checkbox"/>	CONCRETE	REVIEWING	\$15.00	\$15.00	Details
<input checked="" type="checkbox"/>	POOL	REVIEWING	\$15.00	\$15.00	Details Alert

Inspections (1 found)

<input type="checkbox"/>	Inspection Type	Owner/Contractor	Scheduled	Result	Fee	Balance Due	
<input type="checkbox"/>	Pay	FIRAL #1	FRITZ, MICHAEL		\$0.00	\$0.00	Details Schedule

Pay

Requires lower level permits to be issued prior to making payments.

select Permits/Inspections you would like to pay now, then click "Pay"

* Indicates pending web payments exist that are not reflected in the Payments/Credits amount at this time. Additional payments cannot be made until pending payments have been processed.

Home

Citizen Self Service

Animal Licenses

Business Licenses

Email Announcements

General Billing

Motor vehicles

Non-Emergency Requests

Miscellaneous Receipts

Parking Tickets

Permits and Inspections

Accounts

Contact Us

Application Details

Search Results

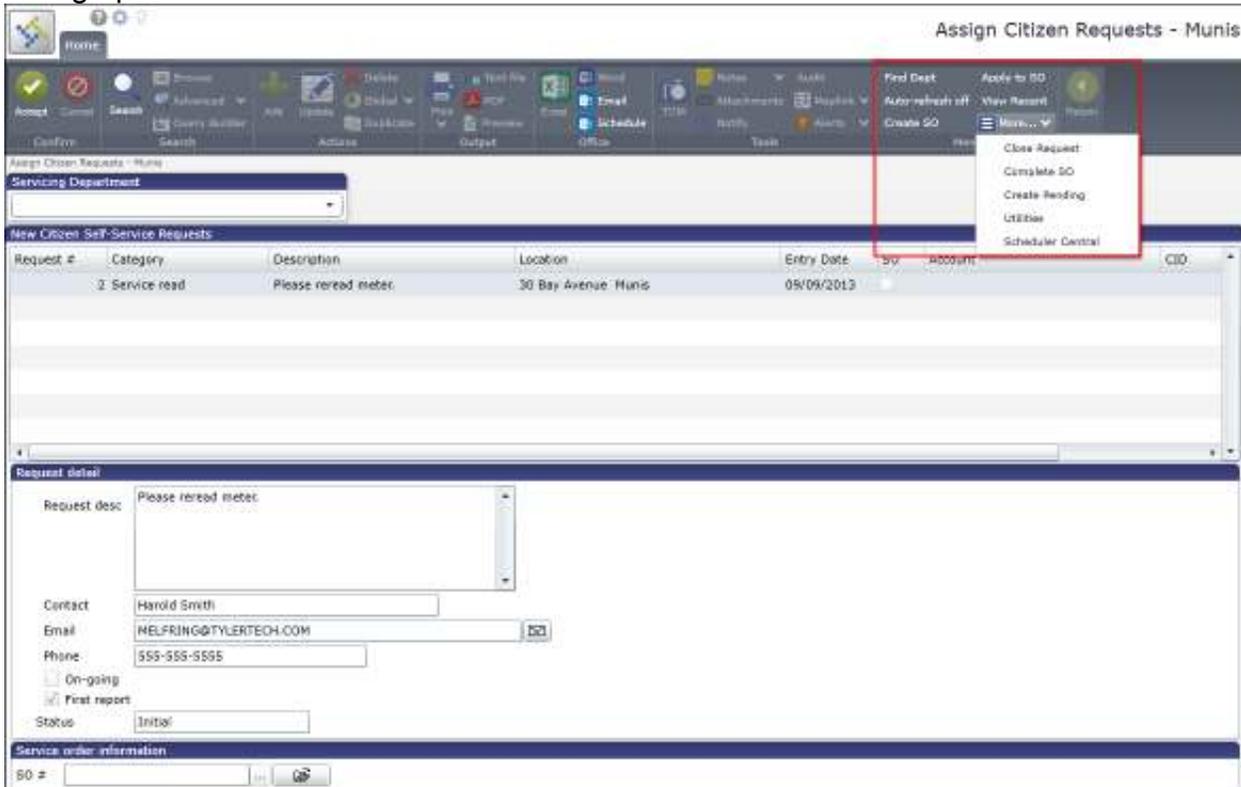
News Search

Service Requests

CSS – Utility Billing, in conjunction with the Munis Citizen Request Settings and Assign Citizen Requests programs, accepts and processes nonemergency service requests for utility billing accounts. Using Citizen Request Settings from the Munis Utility Billing menu, you can define the service types that are accepted through CSS–Utility Billing.



When service requests are made using CSS, the Assign Citizen Requests program receives the requests and provides direct access to Munis programs that manage service request processing. To display service request details, double-click the request item or select a Utility Billing option from the ribbon.

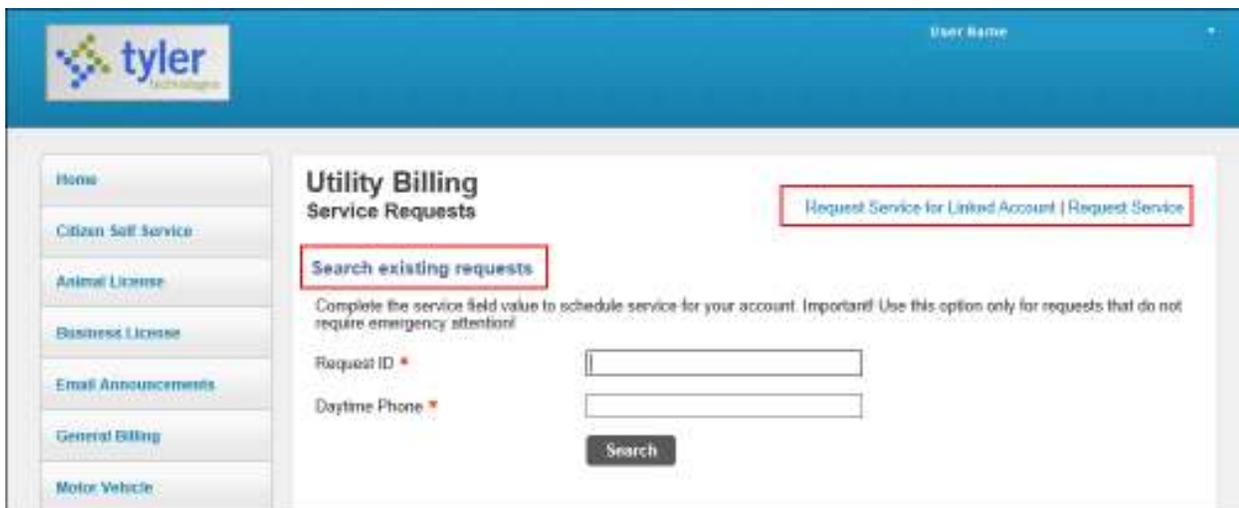


Once the service request set up is complete in CSS Administration, the Utility Billing menu in CSS-Utility Billing includes the Service Requests item.

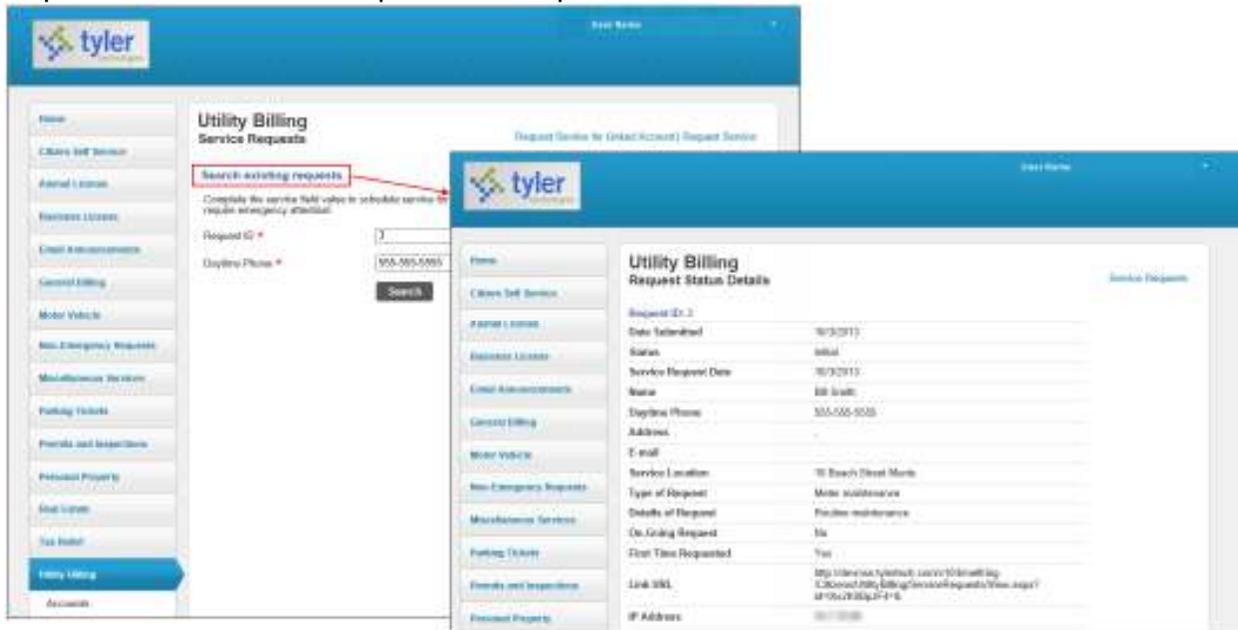


The main Service Requests page provides three options:

- Search for Existing Requests
- Request Service for Linked Account
- Request Service

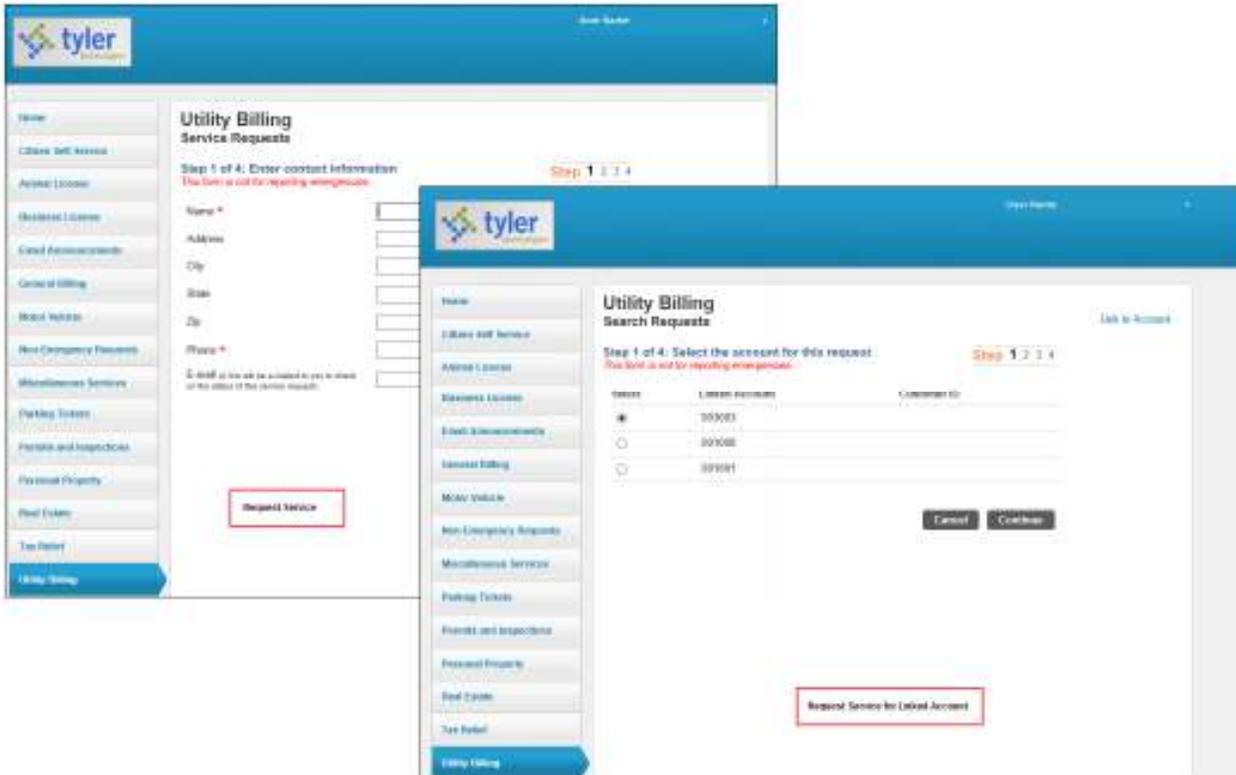


The Search Existing Requests option provides searching for existing service requests by the request ID number and requestor's telephone number.

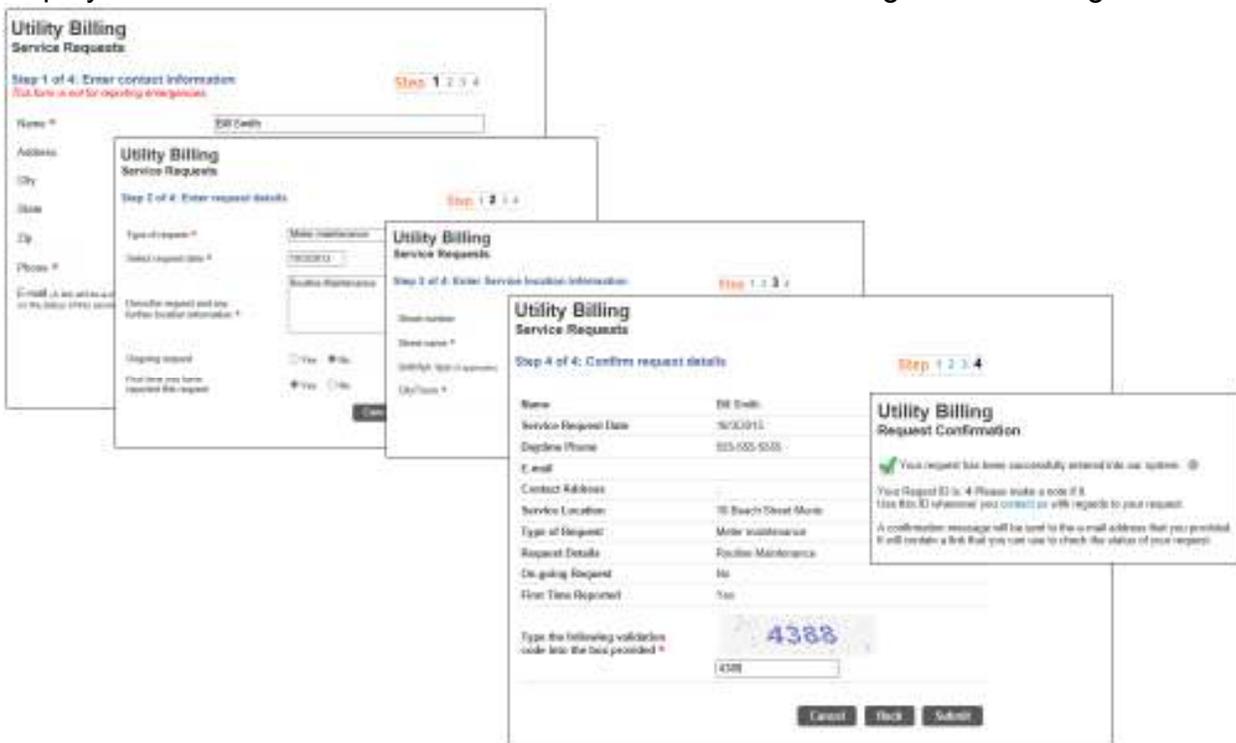


Selecting Request Service displays a Step 1 page that provides the Name, Address, Phone, and Email fields. Only the Name and Phone values are required, but to receive an email confirmation for the request, you must complete the Email box.

Selecting Service Request for Linked Account provides a Step 1 page that includes available linked accounts to which you can associate the service request. When you select an account, the customer details are completed according to that account.

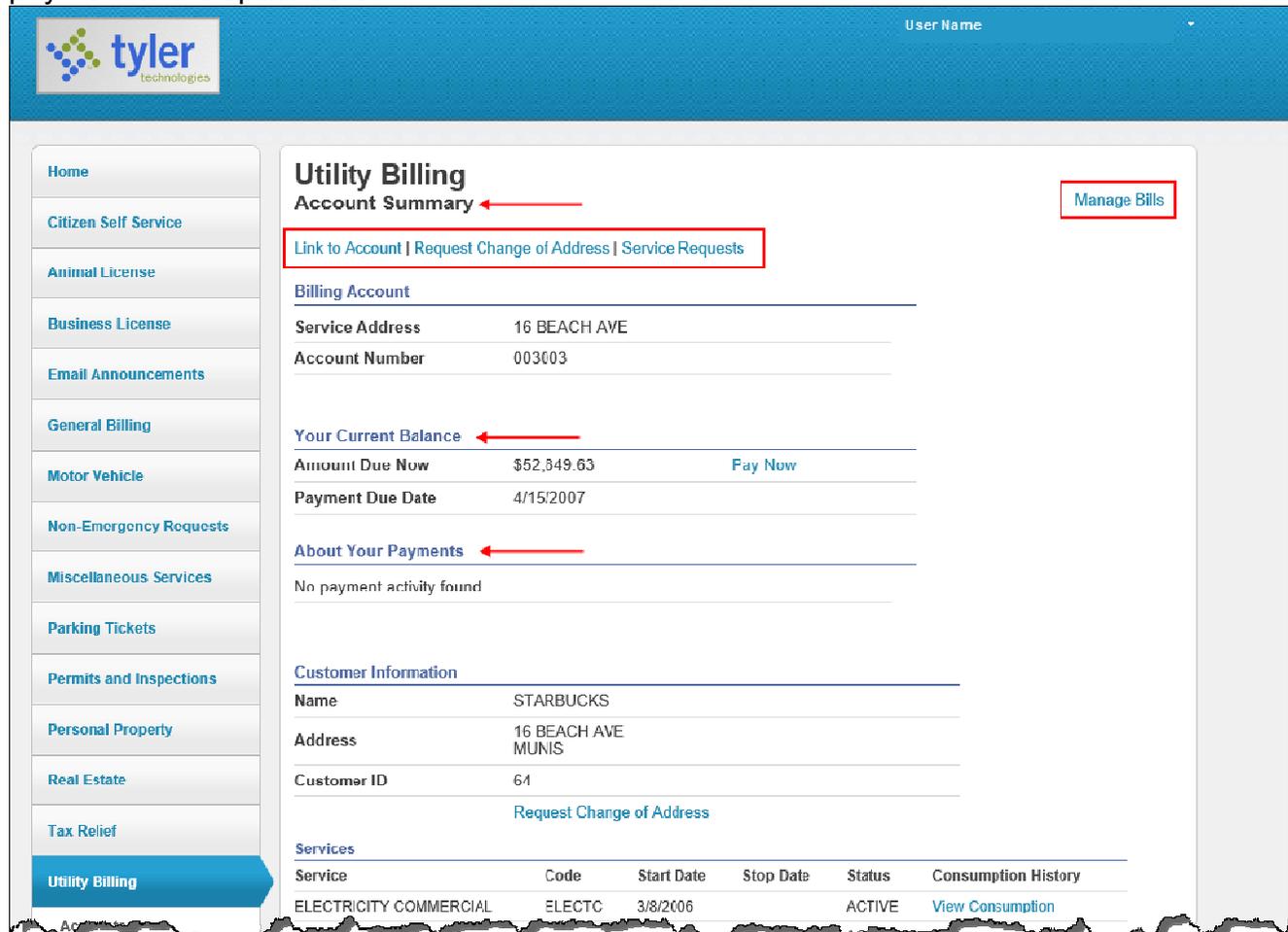


The process for completing a service request includes four steps, after which the program displays an on-screen confirmation and also sends a confirming email message.



Account Summary

The Account Details page in CSS-Utility Billing is relabeled Account Summary. This updated page includes the Your Current Balance and About Your Payments groups. The Your Current Balance group displays the current amount due and provides the Pay Now option to initiate a payment to the specified bill.



Utility Billing
Account Summary

[Link to Account](#) | [Request Change of Address](#) | [Service Requests](#) [Manage Bills](#)

Billing Account

Service Address 16 BEACH AVE
Account Number 003003

Your Current Balance

Amount Due Now \$52,349.63 [Pay Now](#)
Payment Due Date 4/15/2007

About Your Payments

No payment activity found

Customer Information

Name STARBUCKS
Address 16 BEACH AVE
MUNIS
Customer ID 61
[Request Change of Address](#)

Services

Service	Code	Start Date	Stop Date	Status	Consumption History
ELECTRICITY COMMERCIAL	ELECTC	3/8/2006		ACTIVE	View Consumption

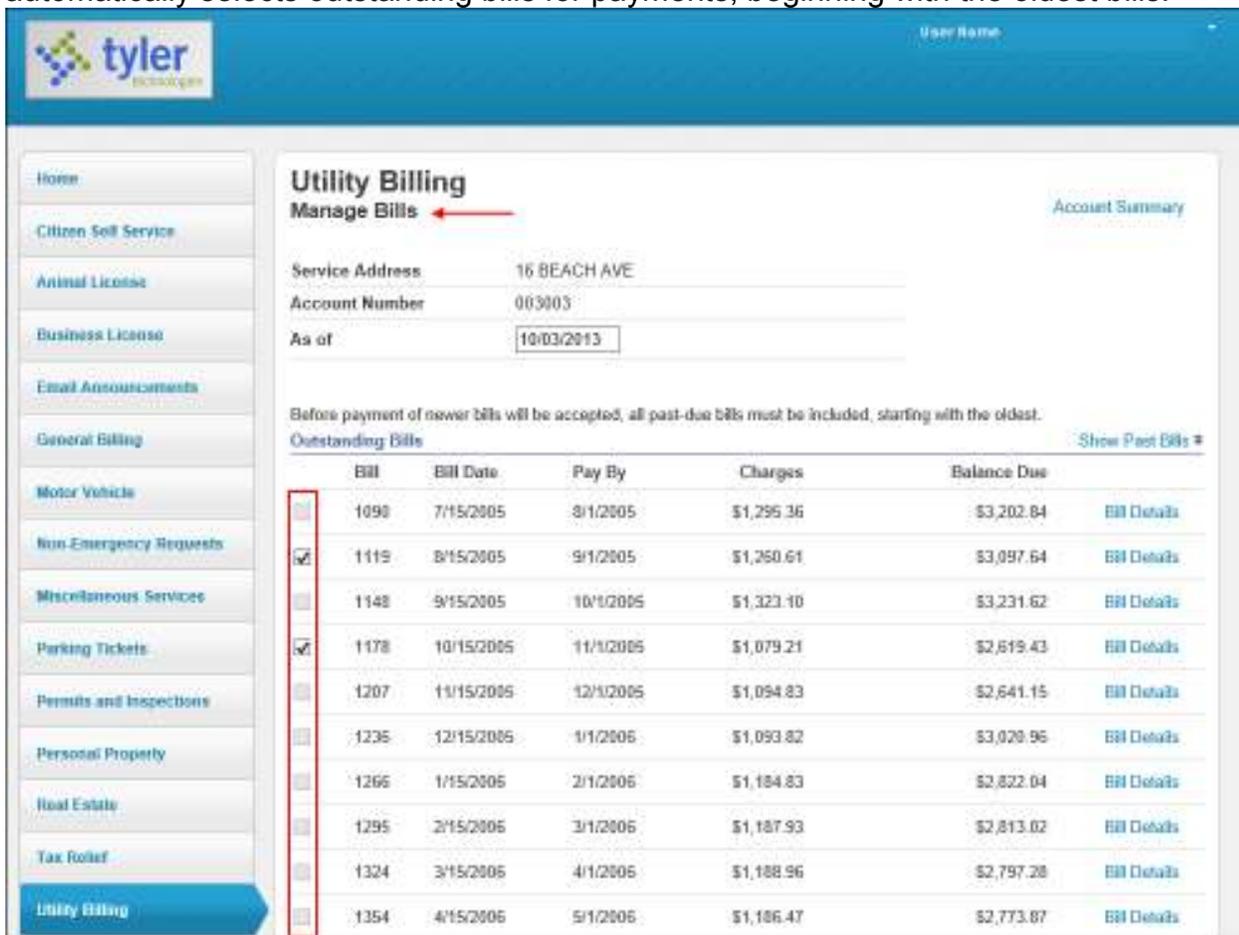
The About Your Payments group displays the last posted payment, provided this amount is greater than zero. A maximum of five payment activity records are available and each row has a Details link that displays the Payments and Adjustment page for the bill.

The Account Summary page also provides the Link to Account, Sign Up for Automatic Payments, Request Changes of Address, and Service Request option. These options are available according to the CSS Administration setup for Utility Billing.

Manage Bills

The CSS Administration–Utility Billing page includes the Require Full Payment of Past-Due Bills, Oldest First setting. When this setting is enabled, the Utility Bills Manage Bills page

automatically selects outstanding bills for payments, beginning with the oldest bills.



Utility Billing
Manage Bills ←

Service Address: 16 BEACH AVE
 Account Number: 003003
 As of: 10/03/2013

Before payment of newer bills will be accepted, all past-due bills must be included, starting with the oldest.

Outstanding Bills [Show Past Bills #](#)

Bill	Bill Date	Pay By	Charges	Balance Due	
<input type="checkbox"/>	1090	7/15/2005	8/1/2005	\$1,295.36	\$3,202.84 Bill Details
<input checked="" type="checkbox"/>	1119	8/15/2005	9/1/2005	\$1,260.61	\$3,097.64 Bill Details
<input type="checkbox"/>	1148	9/15/2005	10/1/2005	\$1,323.10	\$3,231.62 Bill Details
<input checked="" type="checkbox"/>	1178	10/15/2005	11/1/2005	\$1,079.21	\$2,619.43 Bill Details
<input type="checkbox"/>	1207	11/15/2005	12/1/2005	\$1,094.83	\$2,641.15 Bill Details
<input type="checkbox"/>	1235	12/15/2005	1/1/2006	\$1,093.82	\$3,029.96 Bill Details
<input type="checkbox"/>	1266	1/15/2006	2/1/2006	\$1,184.83	\$2,822.04 Bill Details
<input type="checkbox"/>	1295	2/15/2006	3/1/2006	\$1,187.93	\$2,813.02 Bill Details
<input type="checkbox"/>	1324	3/15/2006	4/1/2006	\$1,188.96	\$2,797.28 Bill Details
<input type="checkbox"/>	1354	4/15/2006	5/1/2006	\$1,186.47	\$2,773.87 Bill Details

Automatic Payments

The Utility Billing Automatic Payments page displays existing automatic payment details for the specified utility billing account. To update this information, use the Copy Current EFT Information option, which copies the existing data and presents it in edit mode. This allows you

to update only those values that require changes.

Utility Billing

Automatic Payments

You are already signed up for Automatic Payments. You can make changes to your automatic payments by completing the form below.
If you would like to discontinue automatic payments, please [contact us](#).

Service Address	23 BAY AVE
Account Number	001001

Current Automatic Payment (EFT) information

Bank name	BANK OF AMERICA
Routing number	111000025
Account number	888-888-8888
Account type	Checking
Preferred draft day	15
Your name	RIZZO, FRANK

Copy current EFT information

Bank name *	<input style="width: 60%;" type="text"/>
Routing number *	<input style="width: 60%;" type="text"/>

If the Allow Users to Specify a Preferred Draft Day permission is enabled in CSS Administration for Utility Billing, the Preferred Monthly Draft Day list is included on the Automatic Payments page. Use this list to identify the day of the month that the electronic funds transfer should occur.

Current Automatic Payment (EFT) information

Bank name	BANK OF AMERICA
Routing number	111000025
Account number	888-888-8888
Account type	Checking
Preferred draft day	15
Your name	RIZZO, FRANK

Note: Automatic payments are applicable to linked accounts only.

Munis Revenues 10.5

This document provides an overview of the major Revenues enhancements for Munis® Version 10.5 Early Adoption. Revenues programs include Citizen Self Service (CSS) and central programs.

The Munis Revenues product contains General Revenues and Property Revenues:

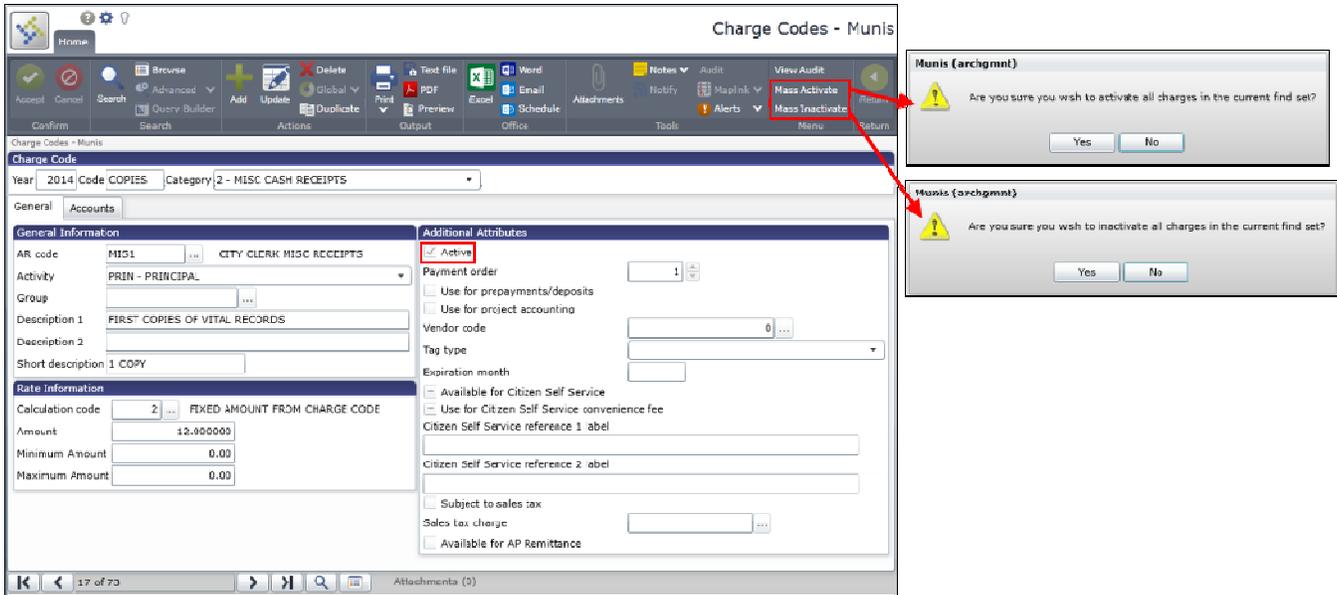
- General Revenues includes Accounts Receivable, Animal Licenses, General Billing, Maine Vehicle Registration, Parking Tickets, Slip Reservations, Vehicle Stickers, and Virginia State Income Tax.
- Property Revenues includes Accounts Receivable, Business Licenses, Central Property, Permits and Code Enforcements, Property Tax Billing, and Utility Billing.
- Revenues central programs include Customer Central, Property Central, UB Central, Contractor Central, and Permit Central.

Accounts Receivable 10.5

The following changes apply to Munis Accounts Receivable programs.

Accounts Receivable Charge Codes

The Mass Activate and Mass Inactivate buttons activate or inactivate all charge codes in the current active set. Once you click Mass Activate or Mass Inactivate, the program displays a confirmation message for you to activate or inactivate the group of charge codes.

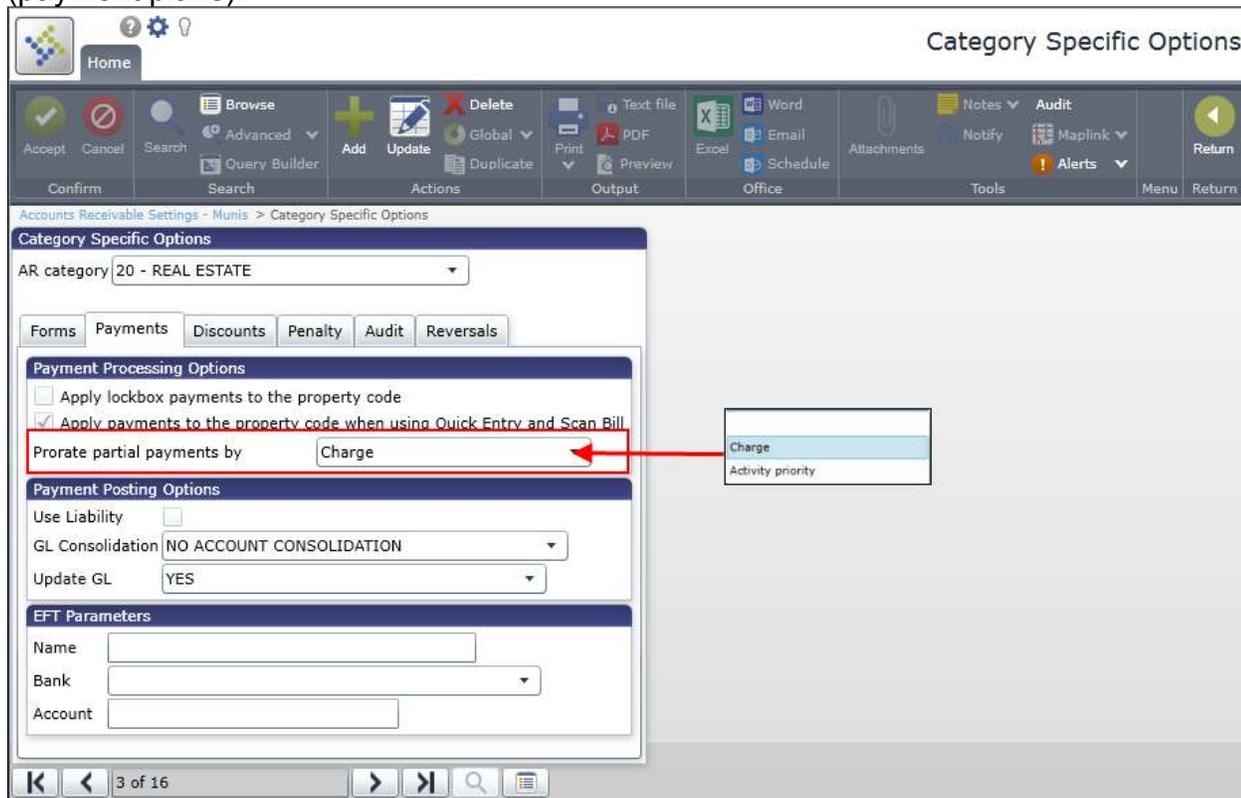


The Microsoft® Excel export includes the following General Ledger accounts: Abatement, Accounts Receivable, Cash, Deferred Revenue, Deposit, Discount, Exemption, Interest Revenue, Liability, Over Short, and Revenues lines 1 to 5.

Accounts Receivable Settings

The When Posting Over/Short Write-Offs Against Charge Codes that Use the Cash Accounting Method, Post to the Revenue and Deferred Revenue Accounts in Addition to the Over/Short

The Prorate Partial Payments By list is available on the Payments tab of the Category Specific screen for categories other than Category 2 (miscellaneous cash receipts) and Category 45 (payment plans).



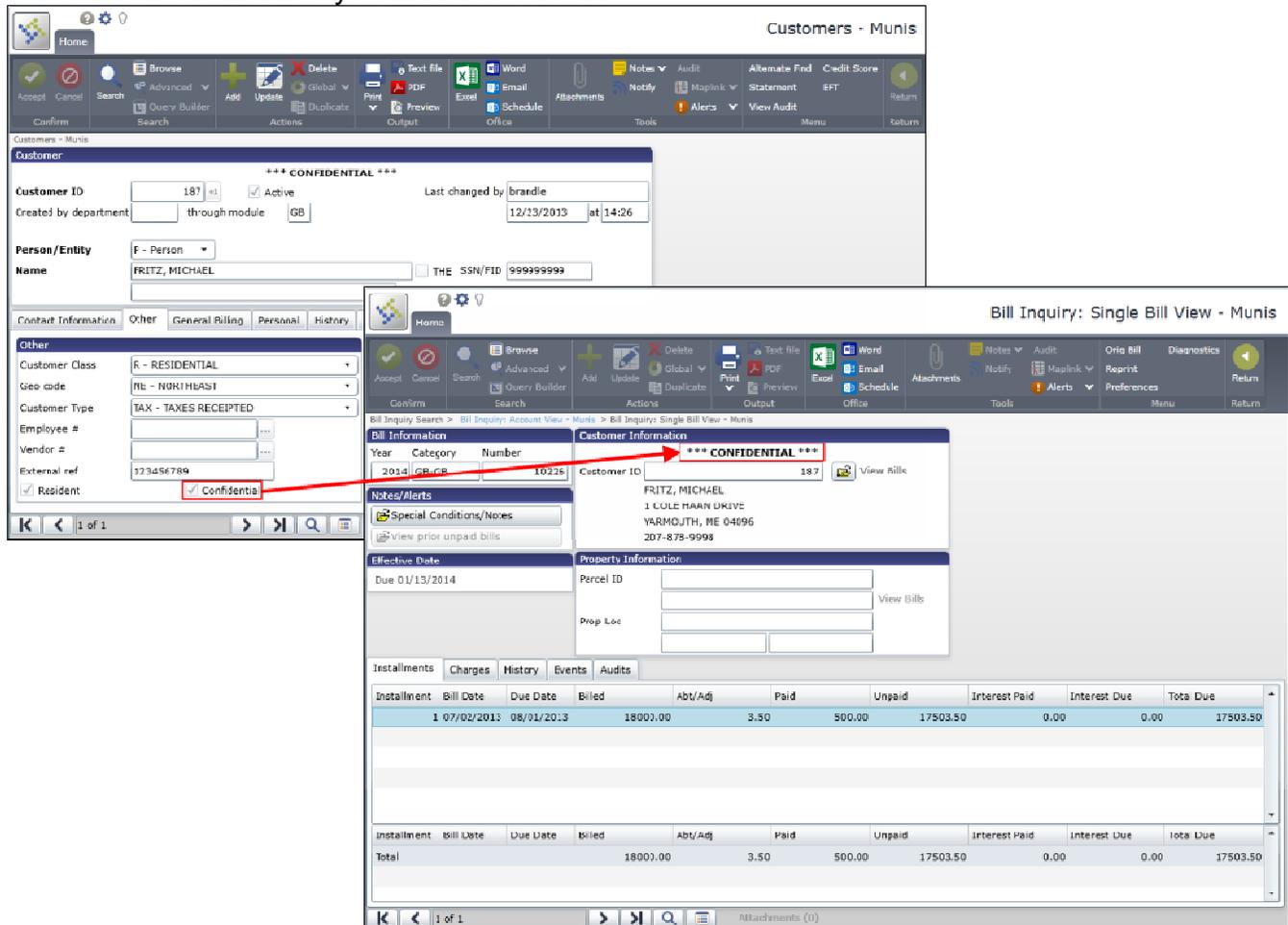
The list includes Charge or Activity Priority options that provide the following results:

- When you select the Charge option, partial payments prorate according to a predefined formula, with all fees and interest paid first.
- When you select the Activity Priority option, the total bill balance divides into three sections: principal-based charges, fees, and interest charges. Calculations determine how much of the total bill each section represents.

Note: This was previously a setting within the Tax Settings program in the Property Tax module.

Customers

When the Confidential check box is selected for a customer on the Other tab in Customers, the Customers, Bill Inquiry, and Payment Entry programs display "Confidential" in bold letters for records related to the customer if the Restrict to 'Public Access' Use Only check box is not selected on the Munis System Roles screen.



The screenshot displays two windows from the Munis system. The top window, titled "Customers - Munis", shows the "Customer" form. The "Other" tab is selected, and the "Confidential" checkbox is checked. The customer information includes: Customer ID 187, Active status, Last changed by brandie on 12/13/2013 at 14:26, Person/Entity F - Person, Name FRITZ, MICHAEL, and SSN/FID 99999999.

The bottom window, titled "Bill Inquiry: Single Bill View - Munis", shows the "Customer Information" section. The customer name "FRITZ, MICHAEL" and address "1 COLE HAN DRIVE, YARMOUTH, ME 04096, 207-878-9998" are visible. A red arrow points from the "Confidential" checkbox in the top window to the "*** CONFIDENTIAL ***" text in the bottom window. Below the customer information is a table of installments:

Installment	Bill Date	Due Date	Billed	Abt/Adj	Paid	Unpaid	Interest Paid	Interest Due	Tota Due
1	07/02/2013	08/01/2013	1800.00	3.50	500.00	17503.50	0.00	0.00	17503.50
Total			1800.00	3.50	500.00	17503.50	0.00	0.00	17503.50

When the Restrict to 'Public Access' Use Only check box is selected in the Munis System group in Roles, the customer information is masked by asterisks as seen in the example below. Reports and export files also contain asterisks for customer information when the Restrict to 'Public Access' Use Only check box is selected.

Bill Inquiry: Single Bill View - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Search Add Update Duplicate Global Print PDF Excel Word Email Schedule Attachments Notify Alerts Preferences Menu Return

Bill Inquiry Search > Bill Inquiry: Account View > Munis > Bill Inquiry: Single Bill View - Munis

Bill Information

Year	Category	Number
2009	GB-GB	10177

Customer Information

*** CONFIDENTIAL ***

Customer ID: 187 View Bills

***** CONFIDENTIAL *****

Property Information

Parcel ID: 999.9 View Bills

Prop Loc:

Effective Date

Due 01/16/2014

Instalments Charges History Events Audits

Instalment	Bill Date	Due Date	Billed	Abt/Adj	Paid	Unpaid	Interest Paid	Interest Due	Total Due
1	04/16/2012	05/16/2012	20.00		0.00	70.00	0.00	0.00	0.00
Total			20.00		0.00	70.00	0.00	0.00	0.00

Attachments (0)

If your site uses the Tyler Cashiering module, the Payment Entry screen displays a message indicating the record is confidential when you click the Alert button.

Tyler Cashiering - Tyler Cashiering Version 2.8

File View Process Options Help

Home Batches Transactions Payment Types Research Reports System Setup

Home > Payment Types > Payment Entry

TYLER CASHIERING VERSION 2.8

Real Estate

Customer Information

ID: 197
Name: FRITZ, MICHAEL
Address: 1 COLE HAAN DRIVE
YARMOUTH, ME 04096

Totals

Balance: \$11,003.73
Due now: \$11,003.73
Payment amount: 11,003.73

Pay Now Add Another

Permits / Inspections

Select	Year	Item	Type	Balance	Due	Payment
<input checked="" type="checkbox"/>	2013	196 POOL	POOL -REVIEW	15.00	15.00	15.00

Real Estate

Select	Year	Item	Parcel	Balance	Due	Payment
<input checked="" type="checkbox"/>	2010-04	002001	9999	1,538.14	1,538.14	1,538.14
<input checked="" type="checkbox"/>	2011-04	3	9999	6,205.54	6,205.54	6,205.54
<input checked="" type="checkbox"/>	2013-04	002001	9999	3,245.05	3,245.05	3,245.05

Alert

CONFID
Customer's names contains

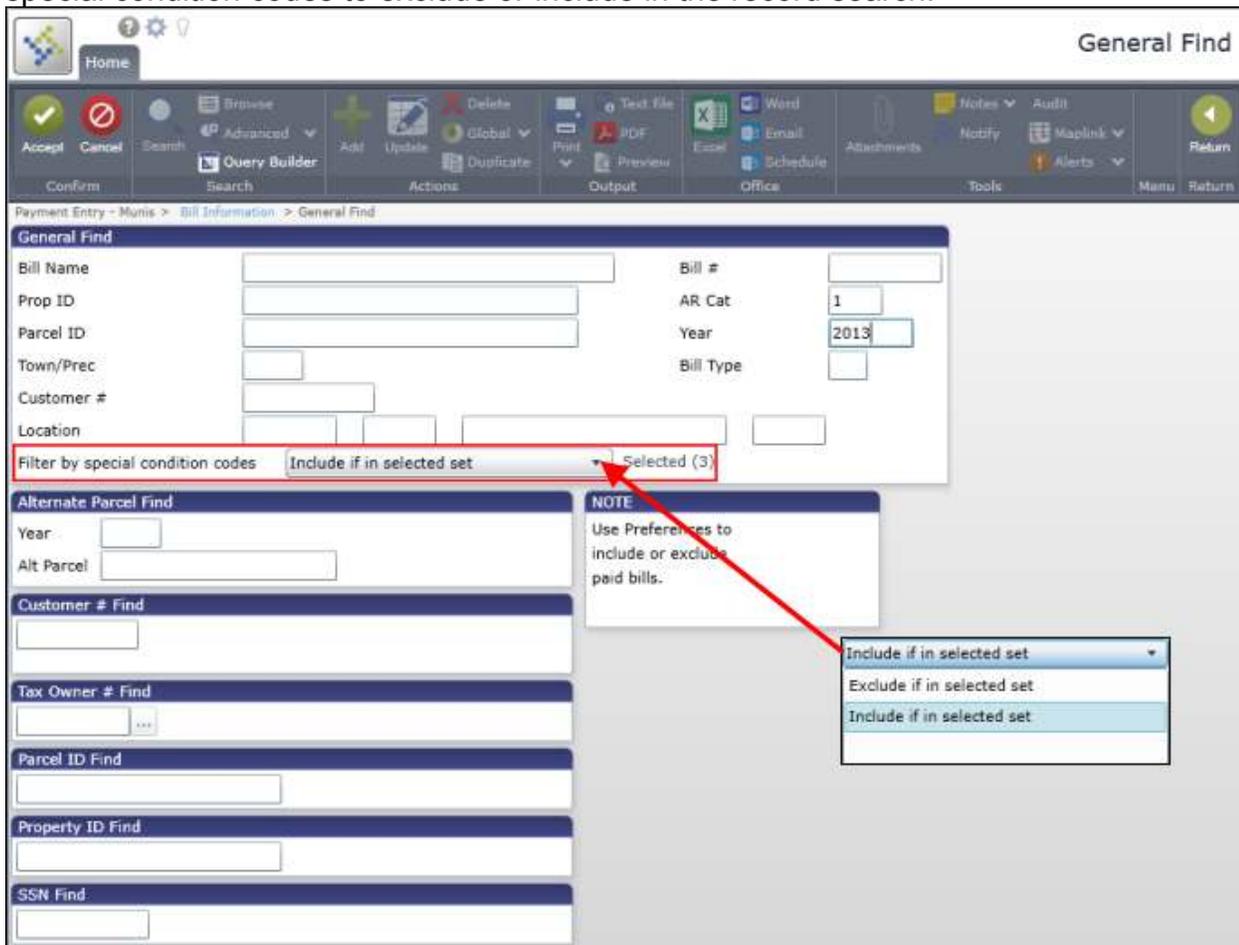
Batch Total \$0.00 (0 transactions)
Transaction Amount \$0.00

Batch created by Brian Randle on 1/26/2014 at 11:50 AM

Settings: Counter - 1/16/2014 - Off - Off - Sample Bank Account

Payment Entry, Bill Inquiry

The Filter by Special Condition Codes list is available on the General Find screen of Payment Entry and Bill Inquiry, allowing you to filter special condition codes on bills. Select from Exclude if in Selected Set or Include if in Selected Set and then click the Selected button to identify the special condition codes to exclude or include in the record search.



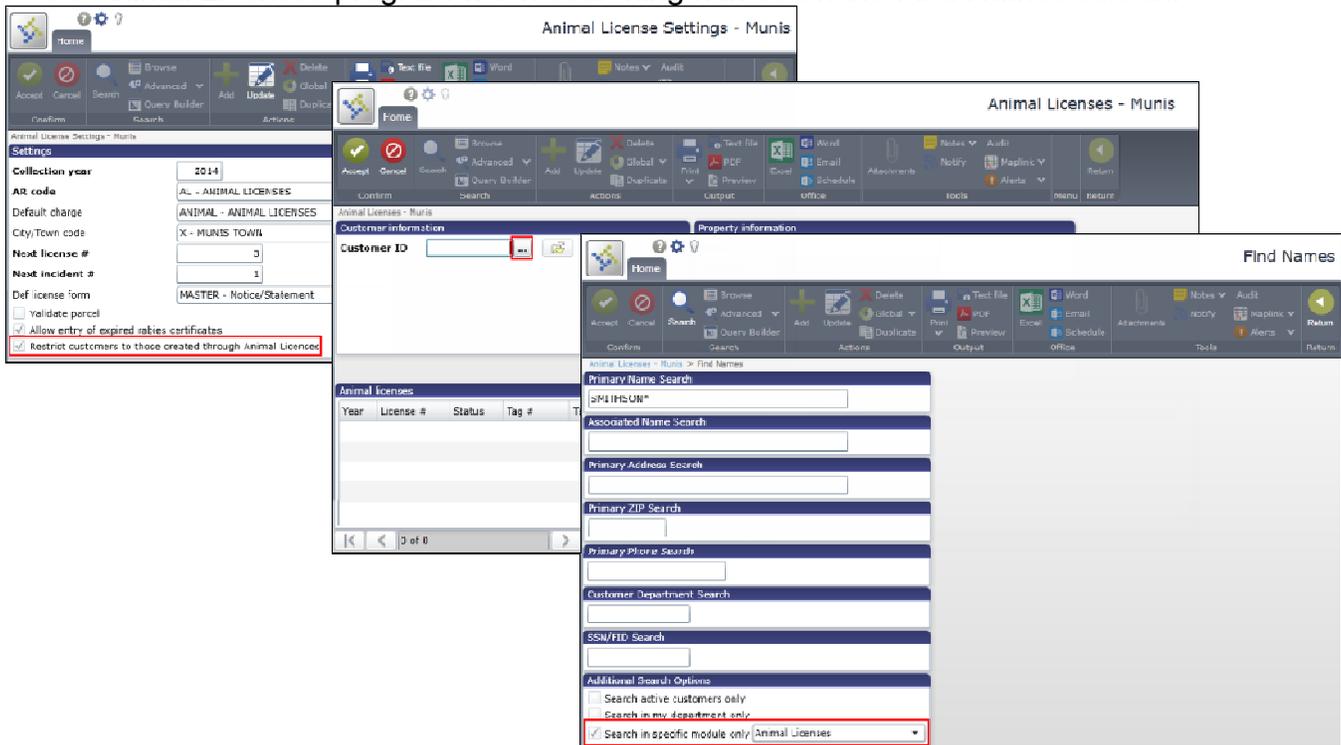
The screenshot displays the 'General Find' interface. At the top, there is a navigation bar with 'Home' and 'General Find' labels. Below this is a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Query Builder', 'Add', 'Update', 'Delete', 'Global', 'Duplicate', 'Print', 'Preview', 'Text file', 'PDF', 'Excel', 'Word', 'Email', 'Schedule', 'Attachments', 'Notify', 'Maplink', 'Alerts', 'Menu', and 'Return'. The main area contains several search filters: 'Bill Name', 'Prop ID', 'Parcel ID', 'Town/Prec', 'Customer #', and 'Location'. To the right, there are fields for 'Bill #', 'AR Cat' (set to 1), 'Year' (set to 2013), and 'Bill Type'. A dropdown menu for 'Filter by special condition codes' is open, showing three options: 'Include if in selected set', 'Exclude if in selected set', and 'Include if in selected set'. A red arrow points from the dropdown to the 'Selected (3)' button. Below the filters, there are sections for 'Alternate Parcel Find', 'Customer # Find', 'Tax Owner # Find', 'Parcel ID Find', 'Property ID Find', and 'SSN Find'. A 'NOTE' box is also present, stating 'Use Preferences to include or exclude paid bills.'

Animal Licenses 10.5

The following change applies to Munis Animal License programs.

Animal License Settings

When you select the Restrict Customers to Those Created Through Animal Licenses check box, only those customers who are created through the Animal License module are available to the Animal Licenses program when searching names on the Find Names screen.

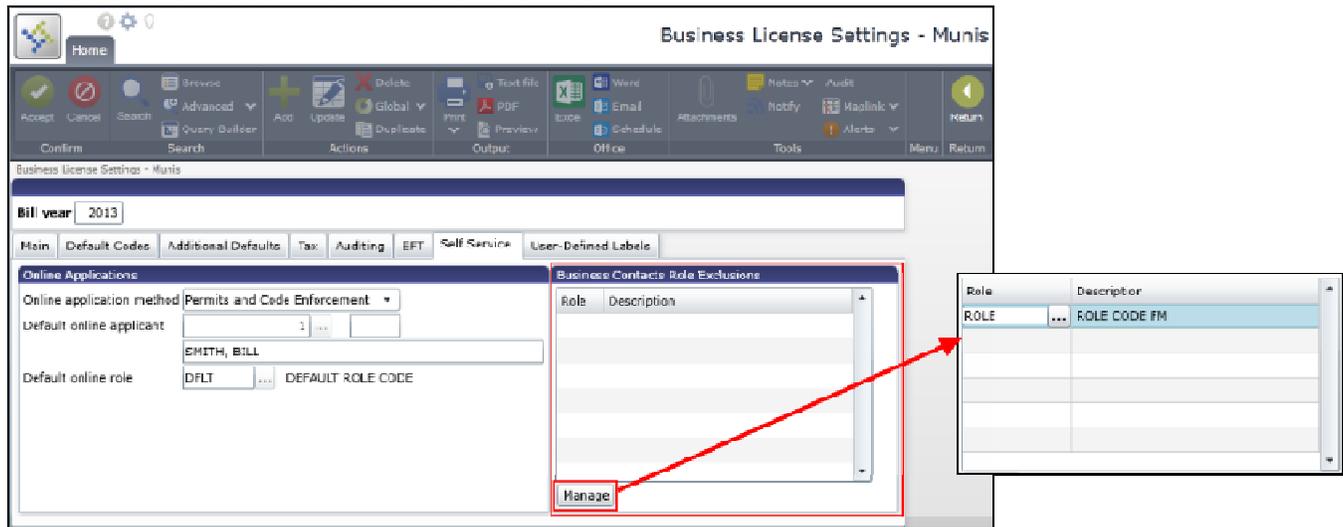


Business Licenses 10.5

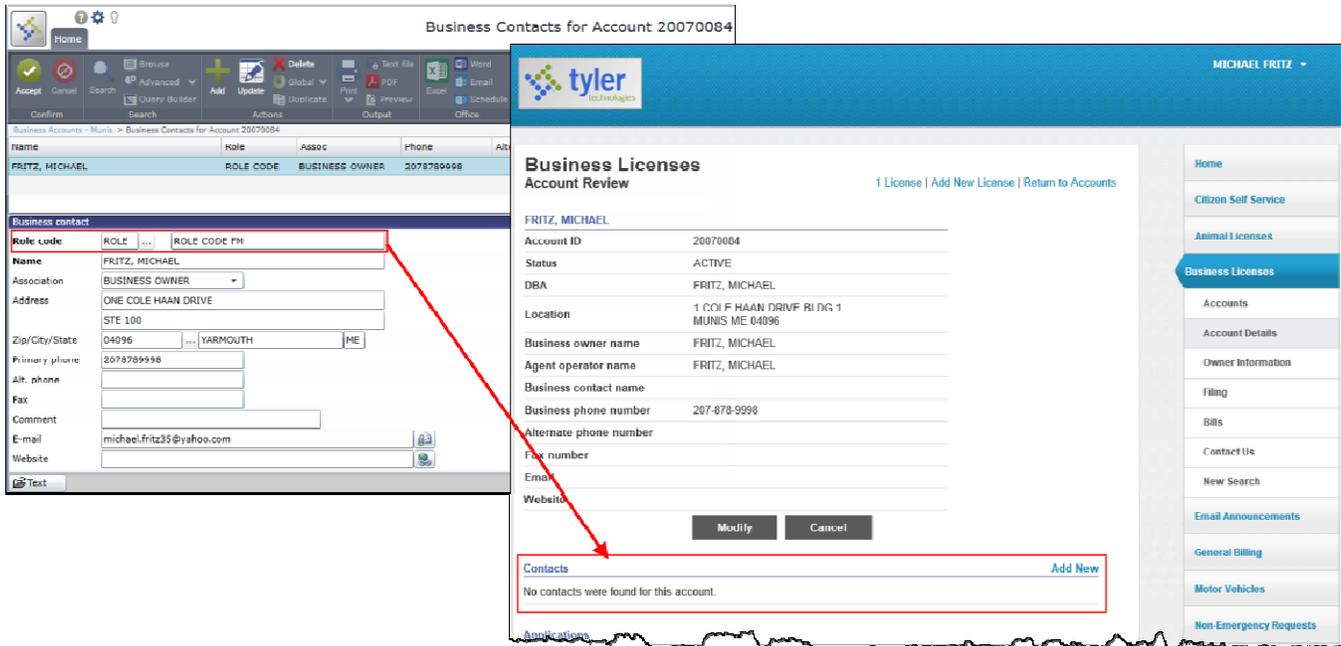
The following changes apply to Munis Business License programs.

Business License Settings

The Self Service tab in Business License Settings contains the Business Contact Role Exclusions group. When you click the Manage button, you can select a role for business contacts to exclude in Citizen Self Service.



When the Role is selected for exclusion, the Business License Account Review page in Citizen Self Service does not display the contact in the Contacts group.

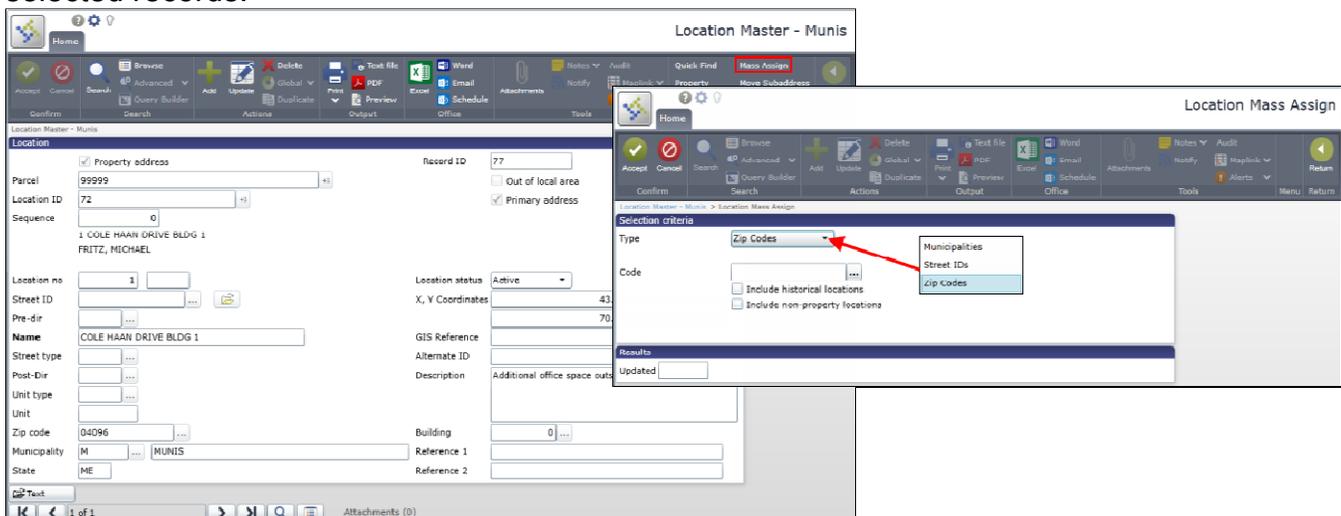


Central Property 10.5

The following changes apply to Munis Central Property programs.

Location Master

The Location Mass Assign screen in Location Master provides an option to update streets for selected records.



Select Street IDs in the Type list and then process the record.

Location Mass Assign

Home

Accept Cancel Search Advanced Add Update Delete Global Print PDF Excel Word Attachments Notify Maplink Alerts Return

Location Master - Munis > Location Mass Assign

Selection criteria

Type: Street IDs

Code: 3 CLIPPER STREET

Include historical locations

Include non-property locations

*This selection will update street for all the Location Masters in the active set.

Results

Updated: 1

The result of the Mass Assign process is the Street ID and Name boxes display the updated Street Code information.

Location Master - Munis

Home

Accept Cancel Search Advanced Add Update Delete Global Print PDF Excel Word Attachments Notify Maplink Alerts Return

Location Master - Munis

Location

Property address

Parcel: 99999

Location ID: 72

Sequence: 0

1 CLIPPER STREET
FRITZ, MICHAEL

Location no: 1

Street ID: 3 Active

Name: CLIPPER STREET

Street type:

Post-Dir:

Unit type:

Unit:

Zip code: 04096

Municipality: M MUNIS

State: ME

Record ID: 77

Out of local area

Primary address

Location status: Active

X, Y Coordinates: 43.7825630000000000000000
70.1900970000000000000000

GIS Reference:

Alternate ID:

Description: Additional office space outside of the warehouse.

Building: 0

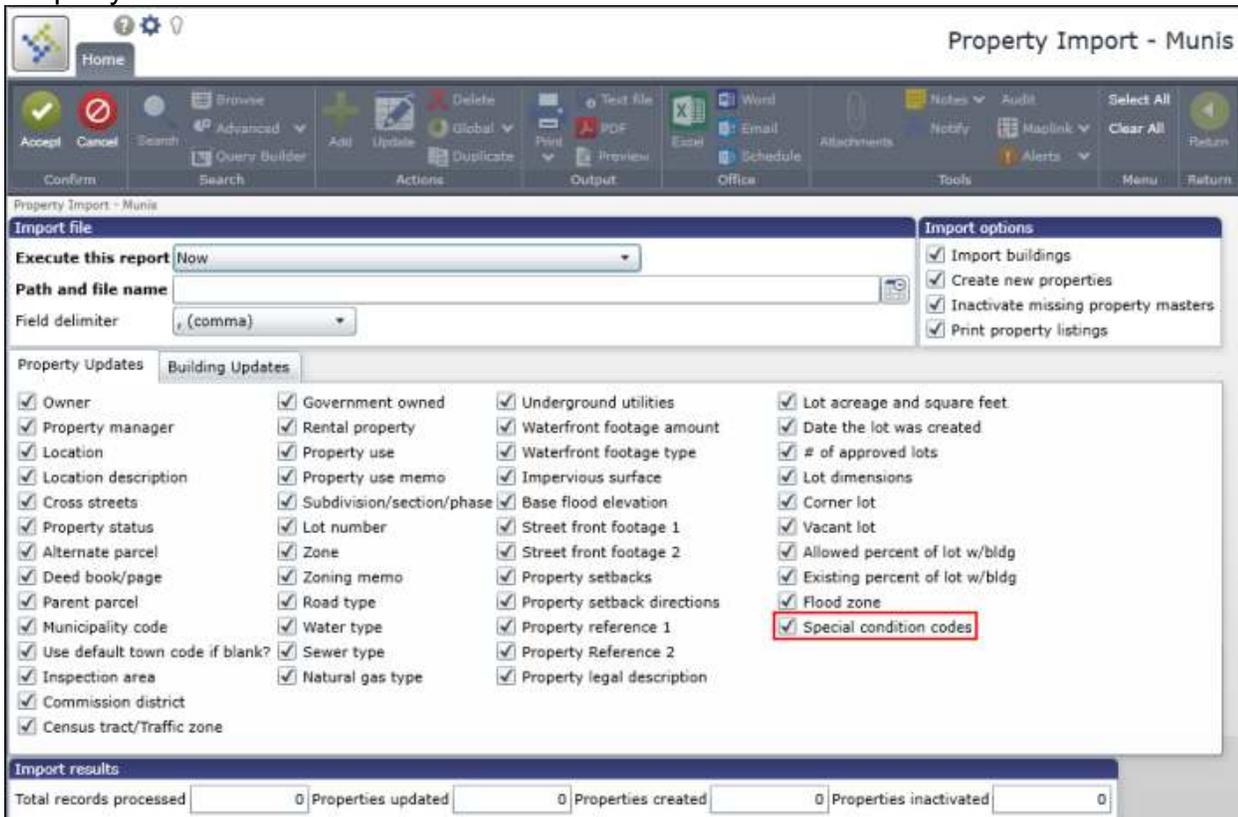
Reference 1:

Reference 2:

1 of 1 Attachments (0)

Property Import

When the Special Condition Codes check box is selected, the import includes up to five special condition codes with start and end dates that can be linked to the property and property owner. The special condition codes must exist in Special Condition Codes prior to processing the import file. The imported special condition codes display in Special Condition screen in Property Master.



Property Import - Munis

Import file

Execute this report: Now

Path and file name: [Text Field]

Field delimiter: (comma)

Import options

- Import buildings
- Create new properties
- Inactivate missing property masters
- Print property listings

Property Updates | **Building Updates**

<input checked="" type="checkbox"/> Owner	<input checked="" type="checkbox"/> Government owned	<input checked="" type="checkbox"/> Underground utilities	<input checked="" type="checkbox"/> Lot acreage and square feet
<input checked="" type="checkbox"/> Property manager	<input checked="" type="checkbox"/> Rental property	<input checked="" type="checkbox"/> Waterfront footage amount	<input checked="" type="checkbox"/> Date the lot was created
<input checked="" type="checkbox"/> Location	<input checked="" type="checkbox"/> Property use	<input checked="" type="checkbox"/> Waterfront footage type	<input checked="" type="checkbox"/> # of approved lots
<input checked="" type="checkbox"/> Location description	<input checked="" type="checkbox"/> Property use memo	<input checked="" type="checkbox"/> Impervious surface	<input checked="" type="checkbox"/> Lot dimensions
<input checked="" type="checkbox"/> Cross streets	<input checked="" type="checkbox"/> Subdivision/section/phase	<input checked="" type="checkbox"/> Base flood elevation	<input checked="" type="checkbox"/> Corner lot
<input checked="" type="checkbox"/> Property status	<input checked="" type="checkbox"/> Lot number	<input checked="" type="checkbox"/> Street front footage 1	<input checked="" type="checkbox"/> Vacant lot
<input checked="" type="checkbox"/> Alternate parcel	<input checked="" type="checkbox"/> Zone	<input checked="" type="checkbox"/> Street front footage 2	<input checked="" type="checkbox"/> Allowed percent of lot w/bldg
<input checked="" type="checkbox"/> Deed book/page	<input checked="" type="checkbox"/> Zoning memo	<input checked="" type="checkbox"/> Property setbacks	<input checked="" type="checkbox"/> Existing percent of lot w/bldg
<input checked="" type="checkbox"/> Parent parcel	<input checked="" type="checkbox"/> Road type	<input checked="" type="checkbox"/> Property setback directions	<input checked="" type="checkbox"/> Flood zone
<input checked="" type="checkbox"/> Municipality code	<input checked="" type="checkbox"/> Water type	<input checked="" type="checkbox"/> Property reference 1	<input checked="" type="checkbox"/> Special condition codes
<input checked="" type="checkbox"/> Use default town code if blank?	<input checked="" type="checkbox"/> Sewer type	<input checked="" type="checkbox"/> Property Reference 2	
<input checked="" type="checkbox"/> Inspection area	<input checked="" type="checkbox"/> Natural gas type	<input checked="" type="checkbox"/> Property legal description	
<input checked="" type="checkbox"/> Commission district			
<input checked="" type="checkbox"/> Census tract/Traffic zone			

Import results

Total records processed: 0 Properties updated: 0 Properties created: 0 Properties inactivated: 0

The Property Import program allows up to ten property owners and ten role codes to match the property owners in the import file. The imported owner names and role codes display in the Property Names screen of Property Master.

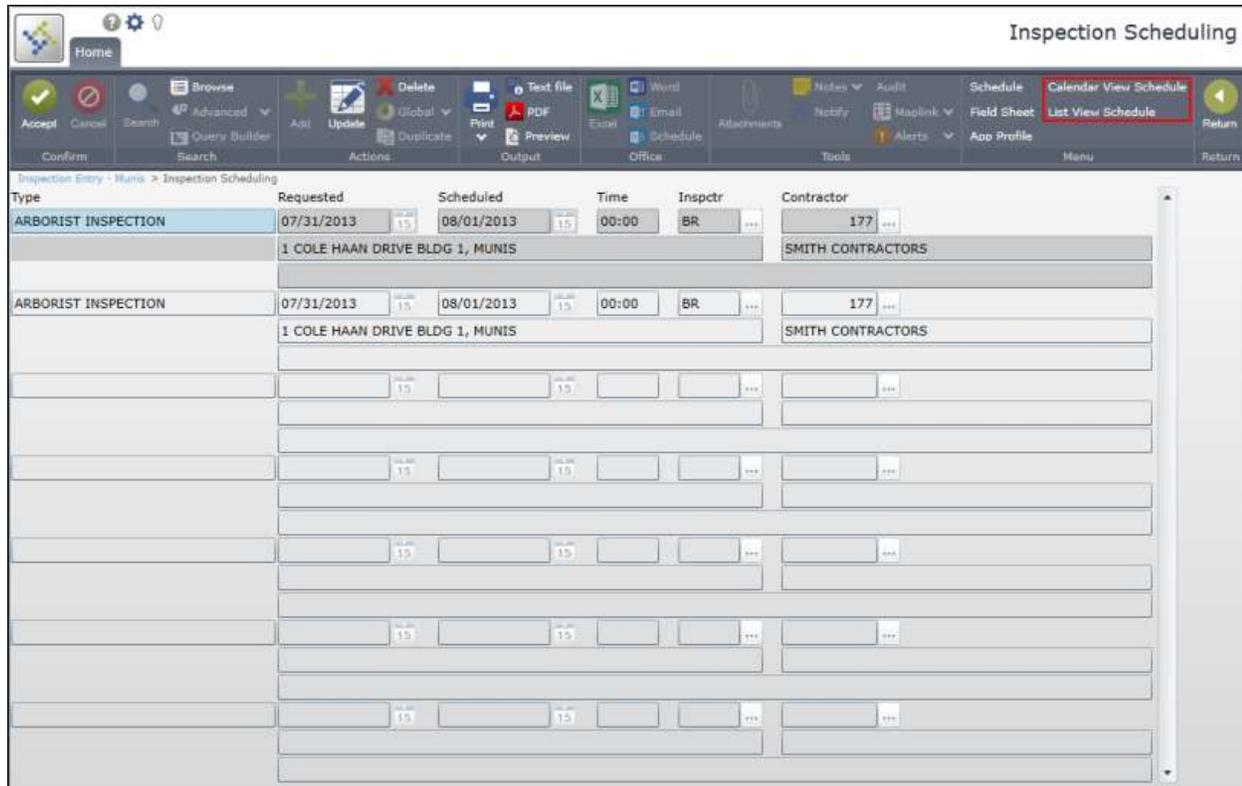
The Standard Property Import includes the primary location ZIP Code™, including the four-digit +4 ZIP Codes, and the property's legal description.

Permits and Code Enforcement 10.5

The following changes apply to Munis Permits and Code Enforcement programs.

Inspection Scheduling

The List View Schedule and Calendar View Schedule buttons replace the View Schedules button.



When you click View List Schedule, the program displays the inspector's schedule in a list format.



Scheduled	Time	Location	Municipality	Inspection Type
01/09/2013	11:28	25 EASTERN AVE	MUNIS	FIRE
02/26/2013		1 COLE HAAN DRIVE BLDG 1	MUNIS	FIRE
07/19/2013		6 Maple Drive	MUNIS	FIRE

When you click Calendar View Schedule, the program displays the inspector's schedule in a calendar format with tabs for Year, Month, Week, and Day.

Note: The Calendar View Schedule functionality will be available in a future release.

Permit and Code Enforcement Settings

The Reinspection Inspector Method list on the Inspections/Violation tab includes the following options: Default Inspector from Inspection Type/Area and Inspector from Closed/Failed Inspection. These options control how an inspector displays on a reinspection when an inspection fails during Inspection Results processing.

Permits and Code Enforcement Settings - Munis

Home

Accept Cancel Search Advanced Add Update Delete Global Print PDF Excel Word Attachments Notes Audit Notify MapLink Alerts Menu Return

Permits and Code Enforcement Settings - Munis

General / Property Permit Applications **Inspections / Violations** Dept/Board Reviews

Inspections/Violations

Next Certificate of Inspection:

Severity/Priority label:

Initial Complaint Source: ...

Reinspection inspector method: Inspector from closed/failed inspection → Default inspector from inspection type/area
Inspector from closed/failed inspection

Complainant names linked to CIDs

Use system date for scheduling requests

Add violation codes to inspection checklist items

Inspection Shifts

			Start	End	Units
Shift 1	AM	Morning	08:00	12:00	4.00
Shift 2	PM	Afternoon	13:00	17:00	4.00
Shift 3	LN	Late Night	18:00	20:00	4.00
12.00 Total					

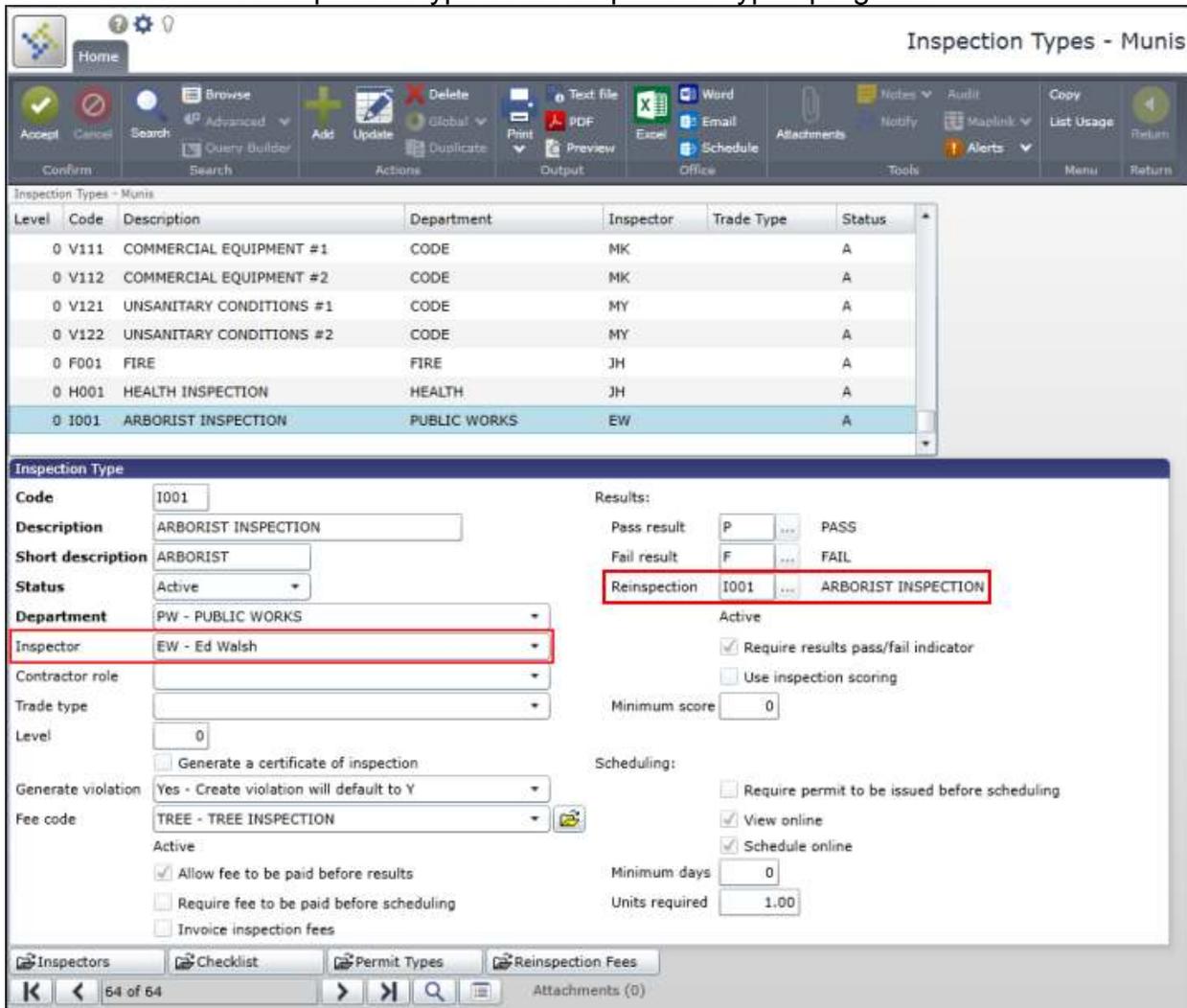
Inspection Scheduling

Perform Inspection Scheduling in:

Last Scheduling Import: 01/13/2014 14:39 Success

The Inspector from Closed/Failed Inspection option uses the inspector on the record at the time the inspection closes.

The Default Inspector from Inspection Type/Area option retrieves the inspector from Inspector list based on the Reinspection type in the Inspection Types program.



The screenshot displays the 'Inspection Types - Munis' application. At the top, there is a navigation bar with 'Home' and various utility icons. Below this is a toolbar with options like 'Accept', 'Cancel', 'Search', 'Advanced', 'Add', 'Update', 'Delete', 'Global', 'Print', 'PDF', 'Text file', 'Word', 'Excel', 'Email', 'Schedule', 'Attachments', 'Notify', 'Maplink', 'Alerts', 'Copy', 'List Usage', and 'Return'.

The main content area features a table titled 'Inspection Types - Munis' with the following data:

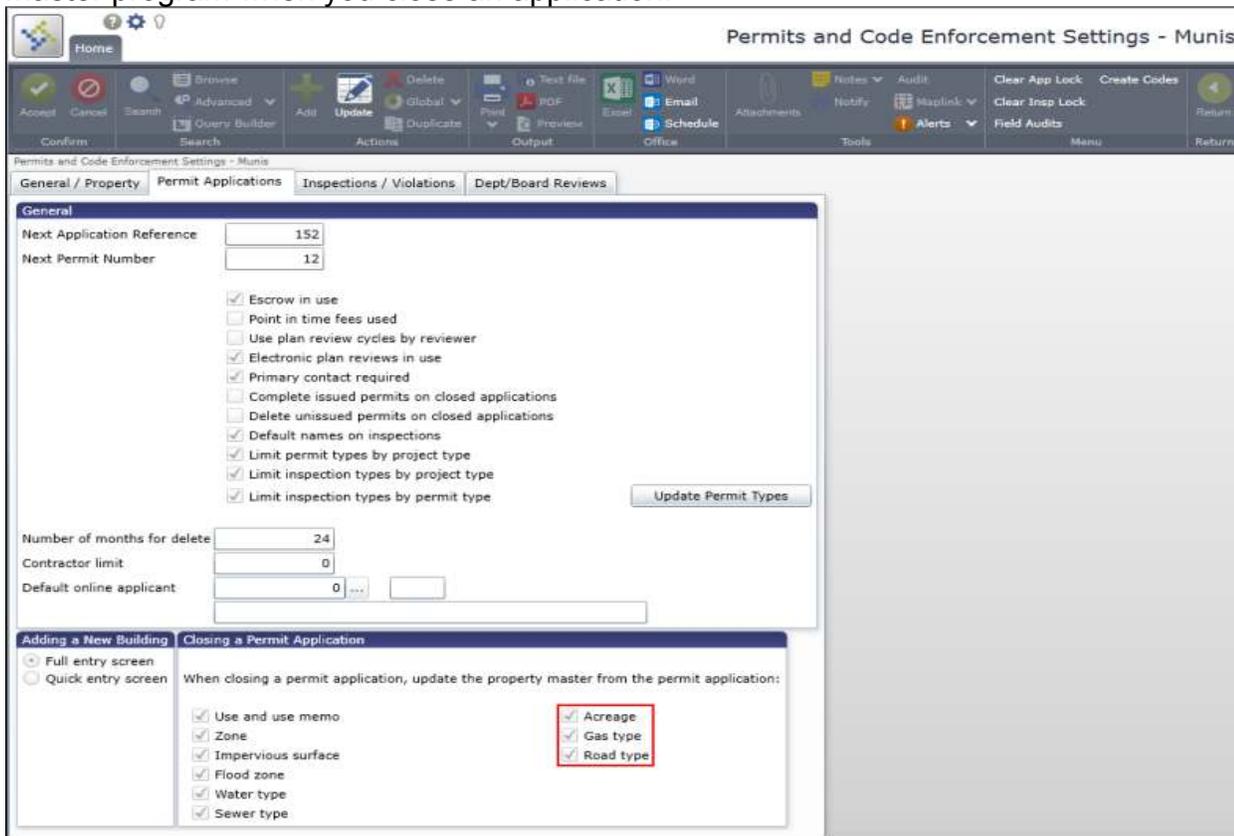
Level	Code	Description	Department	Inspector	Trade Type	Status
0	V111	COMMERCIAL EQUIPMENT #1	CODE	MK		A
0	V112	COMMERCIAL EQUIPMENT #2	CODE	MK		A
0	V121	UNSANITARY CONDITIONS #1	CODE	MY		A
0	V122	UNSANITARY CONDITIONS #2	CODE	MY		A
0	F001	FIRE	FIRE	JH		A
0	H001	HEALTH INSPECTION	HEALTH	JH		A
0	I001	ARBORIST INSPECTION	PUBLIC WORKS	EW		A

Below the table is the 'Inspection Type' configuration form for 'ARBORIST INSPECTION' (Code: I001). The form includes the following fields and options:

- Code:** I001
- Description:** ARBORIST INSPECTION
- Short description:** ARBORIST
- Status:** Active
- Department:** PW - PUBLIC WORKS
- Inspector:** EW - Ed Walsh (highlighted with a red box)
- Contractor role:** (empty)
- Trade type:** (empty)
- Level:** 0
- Generate violation:** Yes - Create violation will default to Y
- Fee code:** TREE - TREE INSPECTION
- Active:**
 - Allow fee to be paid before results
 - Require fee to be paid before scheduling
 - Invoice inspection fees
- Results:**
 - Pass result: P ... PASS
 - Fail result: F ... FAIL
 - Reinspection: I001 ... ARBORIST INSPECTION (highlighted with a red box)
 - Active:
 - Require results pass/fail indicator
 - Use inspection scoring
 - Minimum score: 0
- Scheduling:**
 - Require permit to be issued before scheduling
 - View online
 - Schedule online
 - Minimum days: 0
 - Units required: 1.00

At the bottom of the form, there are tabs for 'Inspectors', 'Checklist', 'Permit Types', and 'Reinspection Fees'. The status bar at the very bottom shows '64 of 64' and 'Attachments (0)'.

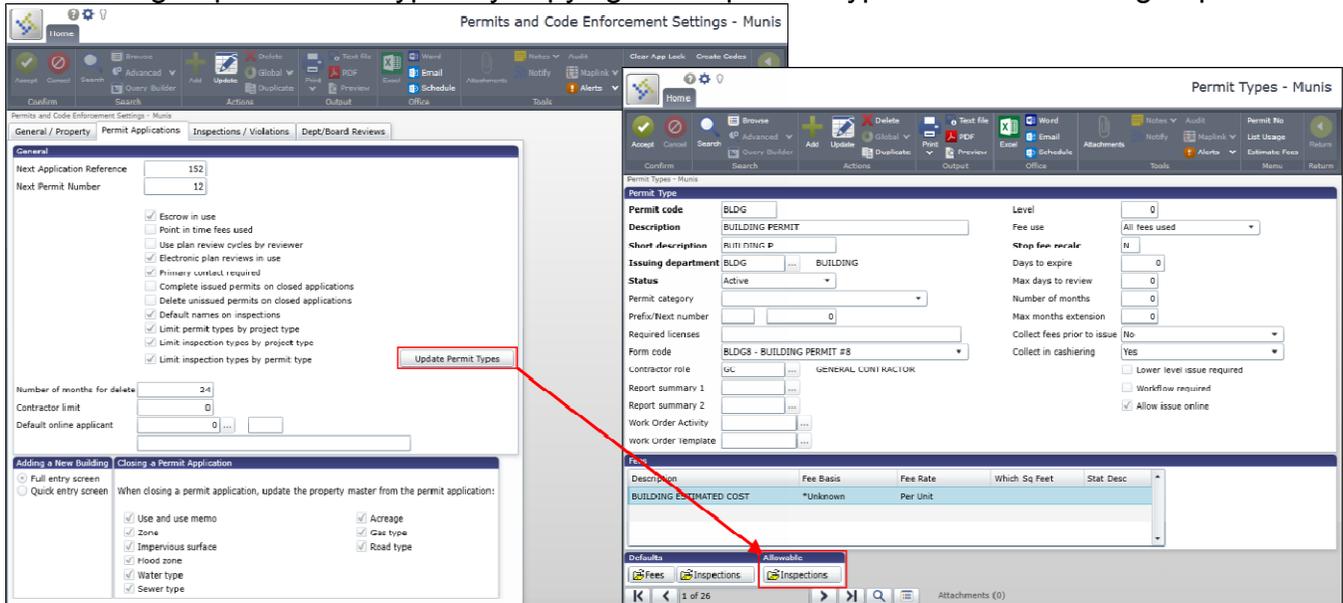
The Acreage, Gas Type, and Road Type check boxes are available on the Permit Applications tab. When selected, these check boxes update the specified data for records in the Property Master program when you close an application.



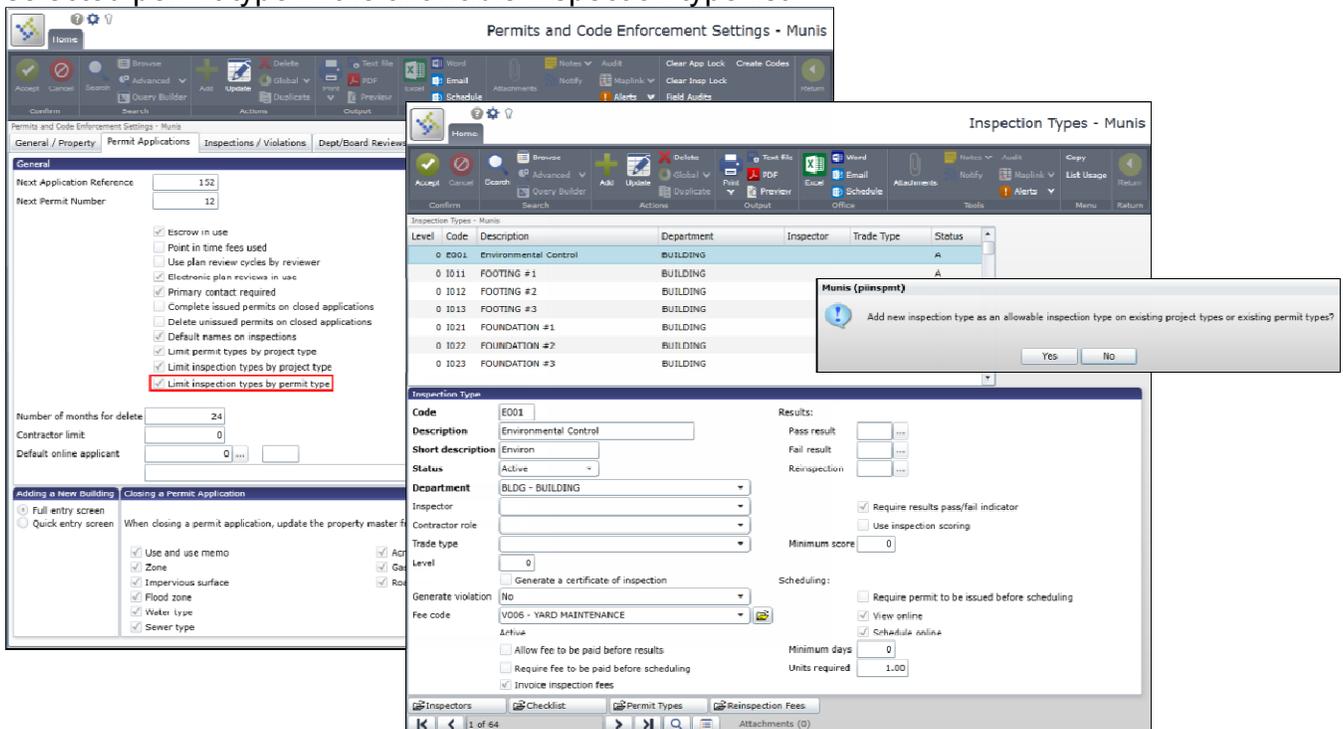
When the permit application closes and the Project Type category is Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal, the following updates occur:

- The Impervious Surface option updates when the project category type is Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal.
- The Existing and Proposed Use, Flood Zone, and Memo options update when the project type category Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal.
- The Water Type and Sewer Type options update when the project type category is Construction or Planning/Zoning.
- The Acreage, Gas Type, and Road Type options update when the project type category is Planning/Zoning.

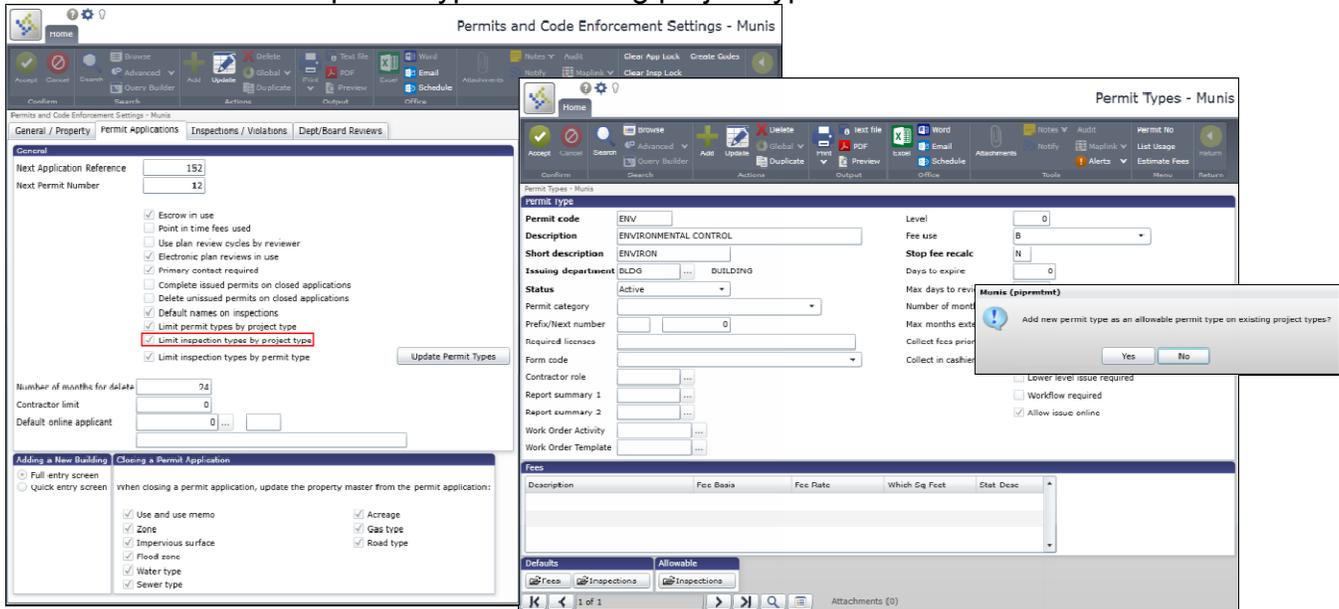
The Update Permit Types button on the Permit Applications tab creates inspection types in the Allowable group in Permit Types by copying the inspection types in the Defaults group.



When the Limit Inspections by Permit Type check box is selected and you create a new inspection type, the Inspection Type program displays a confirmation message for you to add the inspection type to existing permit types. If you click Yes, a new entry is made for each selected permit type in the allowable inspection type list.



When the Limit Permit Types by Project Type check box is selected and you click the Update Permit Types button, the Project Type program includes Permits in the Allowable group, where the existing permit type is also in the Defaults group. When you add a new Permit Type, the program displays a confirmation message for you to indicate the new permit type should be added as an allowable permit type on existing project types.



When you use allowable inspection types, the main screen of Inspection Entry and the Add Multiple screen (accessible through the Inspection Scheduling option) limit the inspection types to only the allowable inspection types for the permit type. If the inspection is not linked to a permit application, the Permit box is not available for entry.

When you select the Full Entry Screen option under Adding a New Building on the Permit Applications tab of Permit and Code Enforcement Settings, the Application Entry program opens the full Application Construction screen when you click Detail for an application with a construction permit type. If you select Quick Entry, the Application Entry program provides a portion of fields on the Application Construction screen when you click Detail.

Permits and Code Enforcement Settings - Munis

Home

Accept Cancel Search Advanced Add Update Global Print PDF Excel Word Email Attachments Notify Maplink Clear App Lock Create Codes Clear Insp Lock Field Audits Return

Confirm Search Actions Output Office Tools Alerts Menu

Permits and Code Enforcement Settings - Munis

General / Property Permit Applications Inspections / Violations Dept/Board Reviews

General

Next Application Reference
 Next Permit Number

Escrow in use
 Point in time fees used
 Use plan review cycles by reviewer
 Electronic plan reviews in use
 Primary contact required
 Complete issued permits on closed applications
 Delete unissued permits on closed applications
 Default names on inspections
 Limit permit types by project type
 Limit inspection types by project type
 Limit inspection types by permit type

Update Permit Types

Number of months for delete
 Contractor limit
 Default online applicant

Adding a New Building Closing a Permit Application

Full entry screen
 Quick entry screen

When closing a permit application, update the property master from the permit application:

Use and use memo
 Zone
 Impervious surface
 Flood zone
 Water type
 Sewer type

Acreage
 Gas type
 Road type

The following screen shot displays the Quick Entry and Full Entry screens:

Application Construction (Quick Entry)

Home

Accept Cancel Search Advanced Add Update Global Print PDF Excel Word Email Attachments Notify Maplink Clear App Lock Create Codes Clear Insp Lock Field Audits Return

Confirm Search Actions Output Office Tools Alerts Menu

Application Construction (Quick Entry)

Building

Proposed use Stories Footprint SF

Building desc Height Gross SF

Structure type 1 Total rooms Net SF

Structure type 2 Bedrooms Finished SF

Structure type 3 Baths Unfinish SF

Style Total units Carage SF

Heat type 1 BR Basement SF

Water type 2 BR Impervious

Sewer type 3+BR

Use memo

Update property

Building Uses

Use Code	Use Desc	Business/Organization Name	Occ Limit Floor	Square Feet Constr Rate
...
...
...
...
...

Application Construction

Application Seq Link

Building use

Structure type 1 Footprint SF Building desc

Structure type 2 Gross SF Garage SF

Structure type 3 Net SF Basement SF

Style Finished SF Finished Bank SF

Building type Unfinish SF Impervious surface

Use memo GIS Building ID

Alt Building ID

Update property

Constructn type

Occupancy group

Occupancy/Use Dimensions/Units Construction Detail Health

Proposed total occupancy limit memo

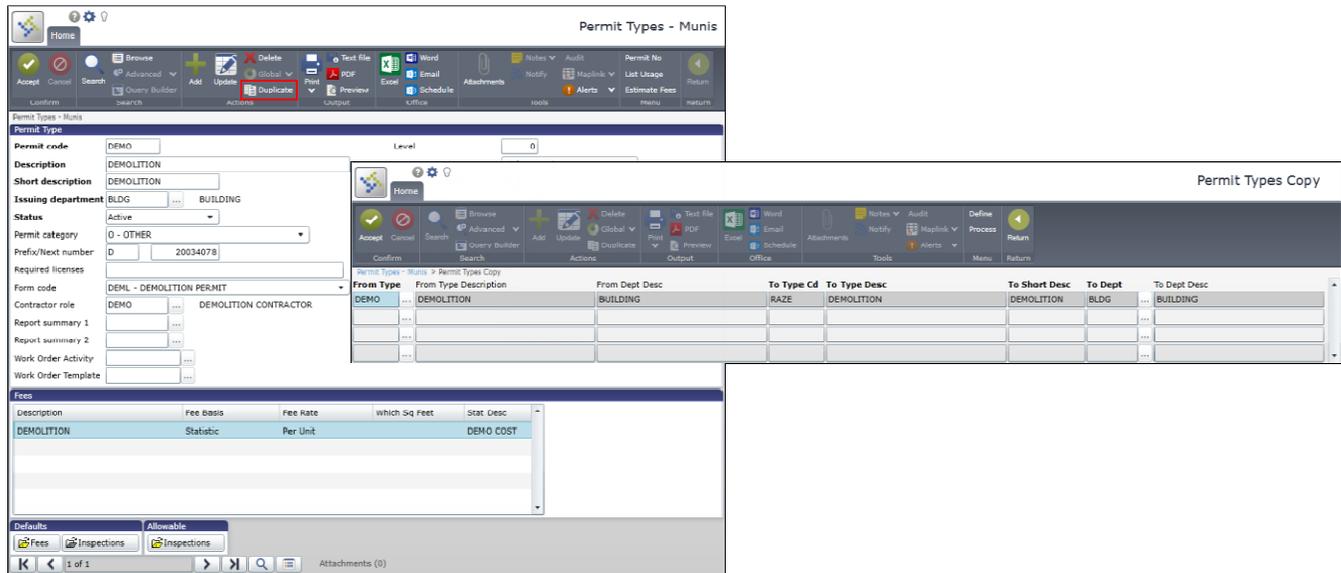
Existing total occupancy limit memo

Use Code	Use Desc	Business/Organization Name	Occ Limit Floor	Square Feet Constr Rate	Factor
...
...
...
...
...

0 of 0

Permit Types

The Permit Types Copy screen allows you to enter multiple lines of From Permit Type Codes, To Permit Type Codes, To Permit Type Descriptions, To Permit Type Short Descriptions, and To Departments. In addition to copying the master record, the Permit Types Copy screen also retains the default fees, items/fixtures, default inspection types, and allowable inspection types from the master record.



The screenshot shows the 'Permit Types - Munis' interface. The 'Permit Types Copy' window is open, displaying a table with the following data:

From Type	From Type Description	From Dept Desc	To Type Cd	To Type Desc	To Short Desc	To Dept	To Dept Desc
DEMO	DEMOLITION	BUILDING	RAZE	DEMOLITION	DEMOLITION	BLDG	BUILDING
...
...
...

The left-hand form contains the following details for the master record:

- Permit code: DEMO
- Description: DEMOLITION
- Short description: DEMOLITION
- Issuing department: BLDG
- Status: Active
- Permit category: 0 - OTHER
- Prefix/next number: D 20034078
- Form code: DEML - DEMOLITION PERMIT
- Contractor role: DEMO

The bottom section shows a table for fees:

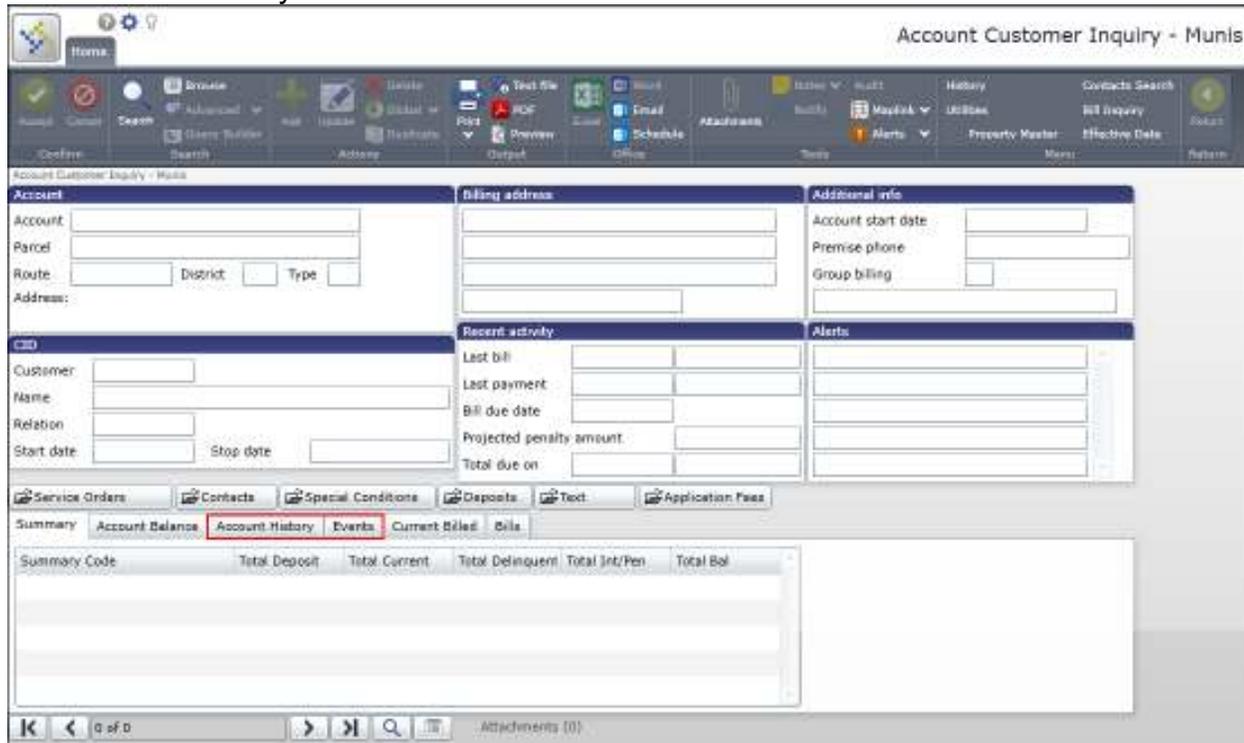
Description	Fee basis	Fee rate	which sq feet	Stat Desc
DEMOLITION	Statistic	Per Unit		DEMO COST

Utility Billing – CIS 10.5

The following changes apply to Munis Utility Billing – CIS programs.

Account Customer Inquiry

The Account History and Events tabs are available.

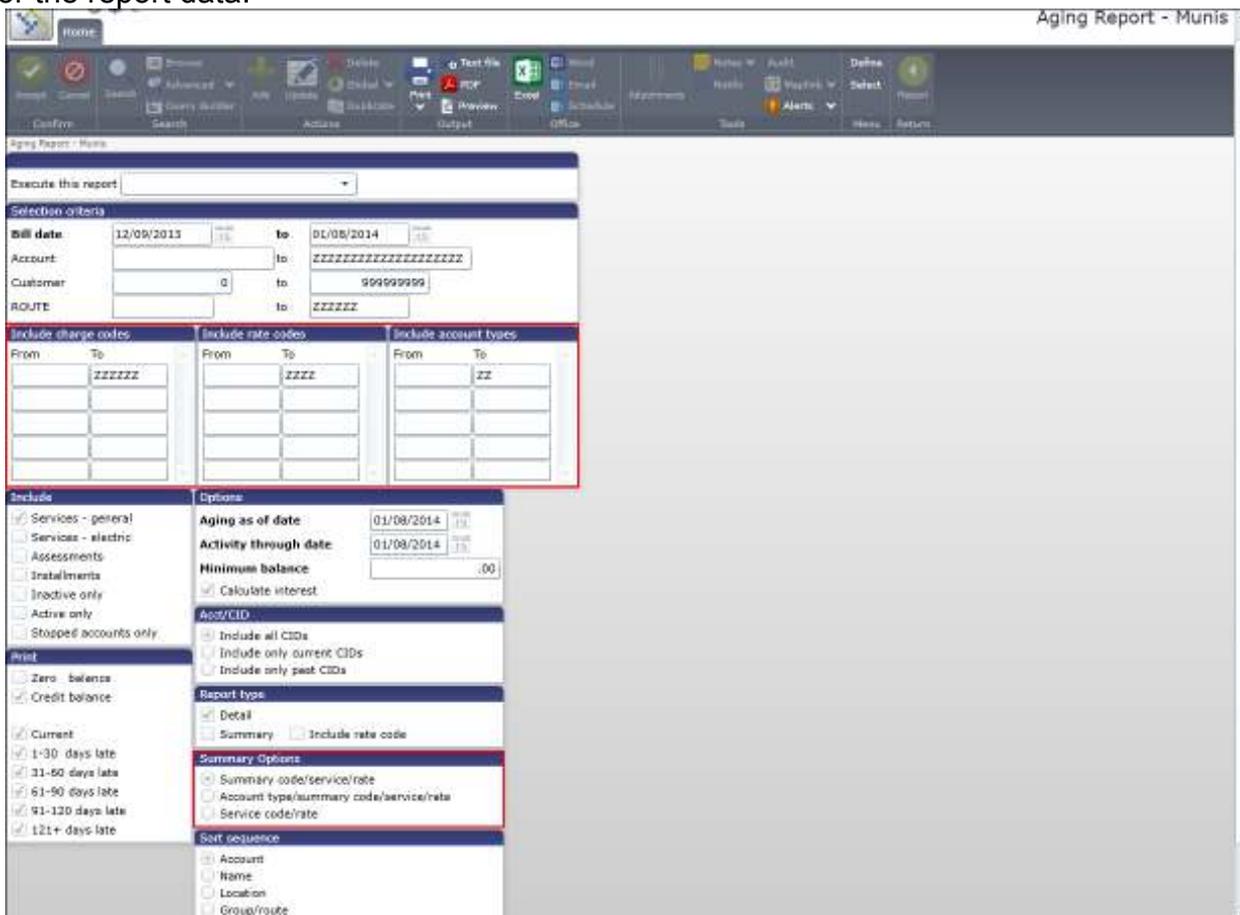


The Events tab displays event history associated with the account/CID and offers filtering capability. The Account History tab provides summary and detail transaction data, viewable by AR category. The account history information is also available using the Account History program.

Date	Type	Desc	Reference	Amount	Year	Bill #	AR Cat
02/09/2013							
07/31/2007	1000			345.17			
03/15/2007	Multiple			10240.81			
02/28/2007				50.00			
10/16/2006				-3631.84			
10/01/2006	Multiple			35680.37			
06/15/2006	Multiple			5157.47			
05/15/2006	Multiple			4932.91			
04/15/2006	Multiple			5193.75			
03/28/2006				144.10			
03/15/2006	Multiple			5191.98			

Aging Report

The Include Charge Codes, Include Rate Codes, and Include Account Types groups define up to five ranges of record sets for each category. These ranges provide expanded search criteria for the report data.



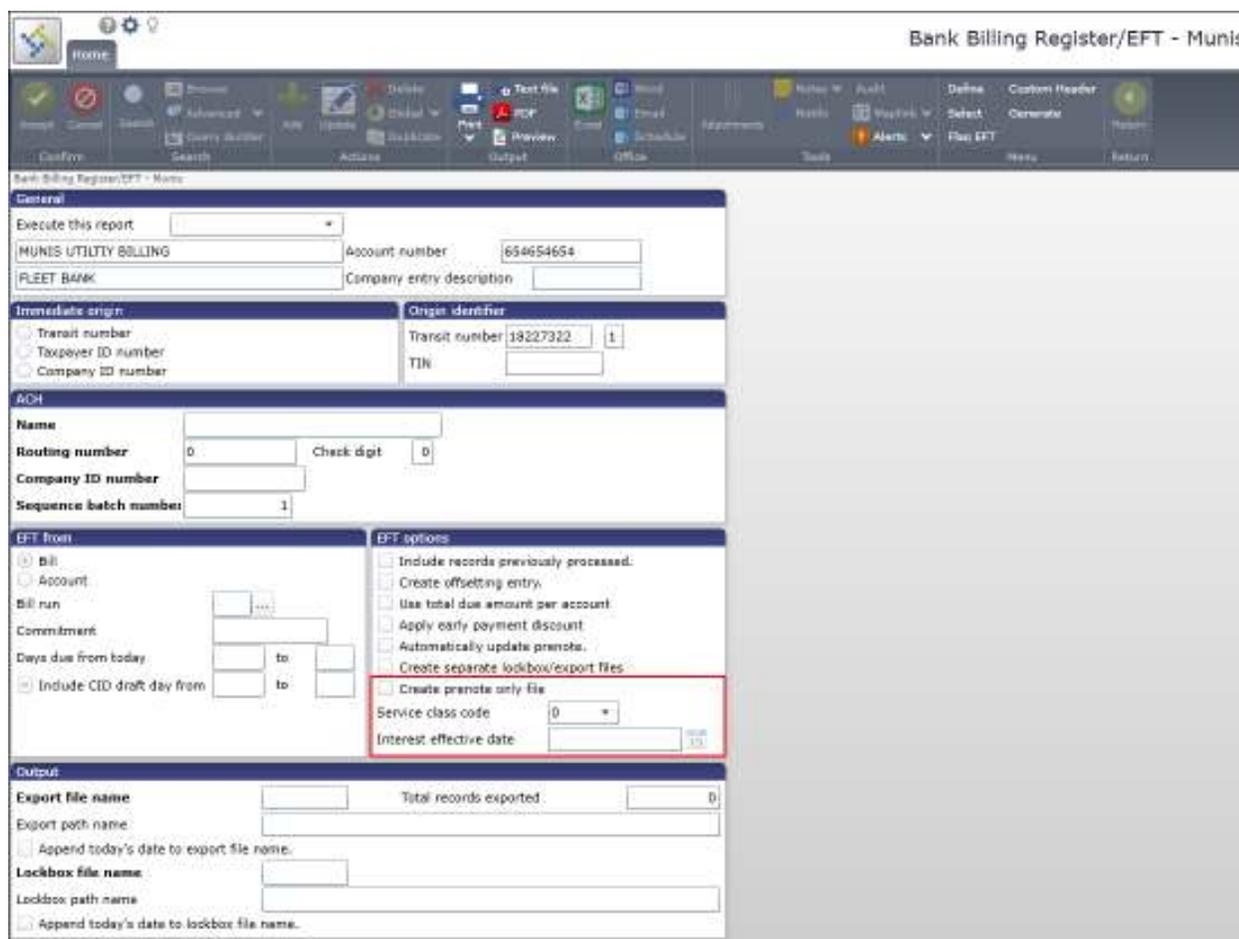
The screenshot shows the 'Aging Report - Munis' interface with the following sections:

- Execute this report:** A dropdown menu.
- Selection criteria:**
 - Bill date: 12/09/2013 to 01/08/2014
 - Account: [] to []
 - Customer: 0 to 99999999
 - ROUTE: [] to []
- Include charge codes:** From [] To [] (with 'ZZZZZZ' in the 'To' field).
- Include rate codes:** From [] To [] (with 'ZZZZ' in the 'To' field).
- Include account types:** From [] To [] (with 'ZZ' in the 'To' field).
- Include:**
 - Services - general
 - Services - electric
 - Assessments
 - Installments
 - Inactive only
 - Active only
 - Stopped accounts only
- Options:**
 - Aging as of date: 01/08/2014
 - Activity through date: 01/08/2014
 - Minimum balance: .00
 - Calculate interest
 - App/CID:
 - Include all CIDs
 - Include only current CIDs
 - Include only past CIDs
 - Report type:
 - Detail
 - Summary
 - Include rate code
 - Summary options:
 - Summary code/service/rate
 - Account type/summary code/service/rate
 - Service code/rate
 - Sort sequence:
 - Account
 - Name
 - Location
 - Group/route
- Print:**
 - Zero balance
 - Credit balance
 - Current
 - 1-30 days late
 - 31-60 days late
 - 61-90 days late
 - 91-120 days late
 - 121+ days late

If you select the Summary check box in the Report Type group, the Summary Options group is accessible. Select one of these options to specify how the report summarizes amounts.

Bank Billing Register/EFT

The Bank Billing Register/EFT program includes the Create Prenote Only File check box, the Service Class Code list, and the Interest Effective Date box.



The screenshot shows the 'Bank Billing Register/EFT - Munis' application window. The 'EFT options' section is highlighted with a red box. It contains the following fields and options:

- Include records previously processed.
- Create offsetting entry.
- Use total due amount per account.
- Apply early payment discount.
- Automatically update prenote.
- Create separate lockbox/export files.
- Create prenote only file.
- Service class code:
- Interest effective date:

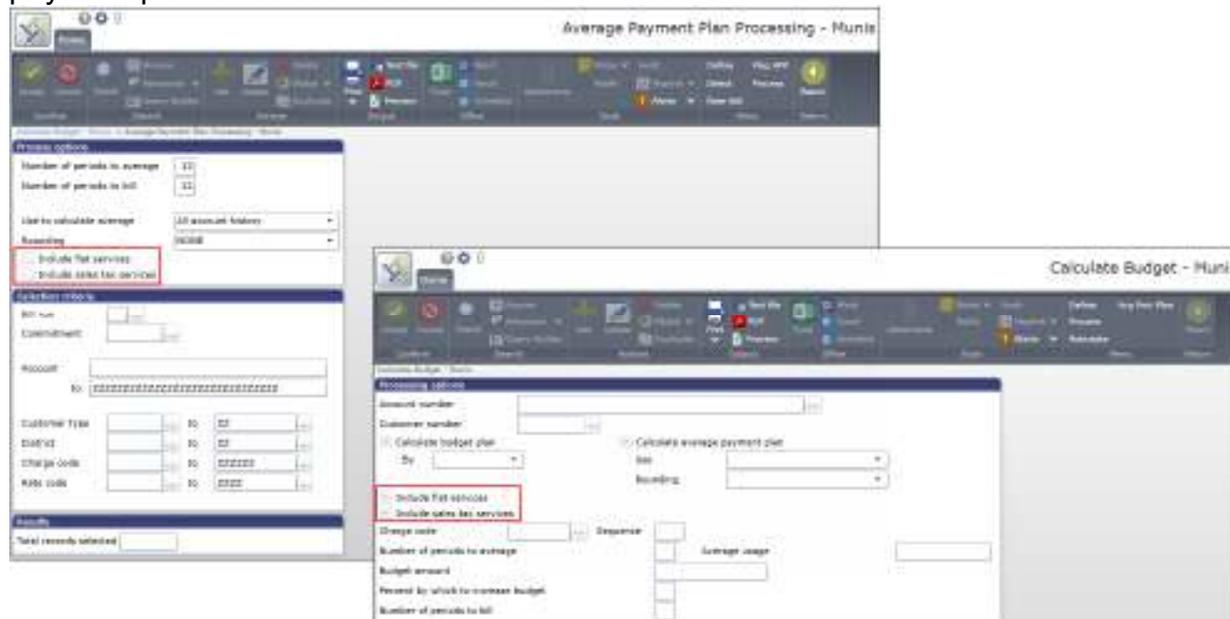
The Create Prenote Only File check box in the EFT Options group allows you to create an EFT prenote outside of the bill run process.

The Service Class Code list determines the service charge code (200 mixed debit and credits or 225 debits only) that is supplied in the output file. If you select the Create Offsetting Entry check box, this list is not accessible.

The Interest Effective Date specifies a date for calculating interest of past due bills. When you enter a value in the Interest Effective Date box, the program uses this date when calculating the interest for a bill and adds the amount to the EFT. If this box is blank, no interest is calculated for the transaction.

Calculate Budget, Average Payment Plan

The Include Flat Services and Include Sales Tax Services check boxes cause budget and payment plan calculations to include flat and sales tax services.



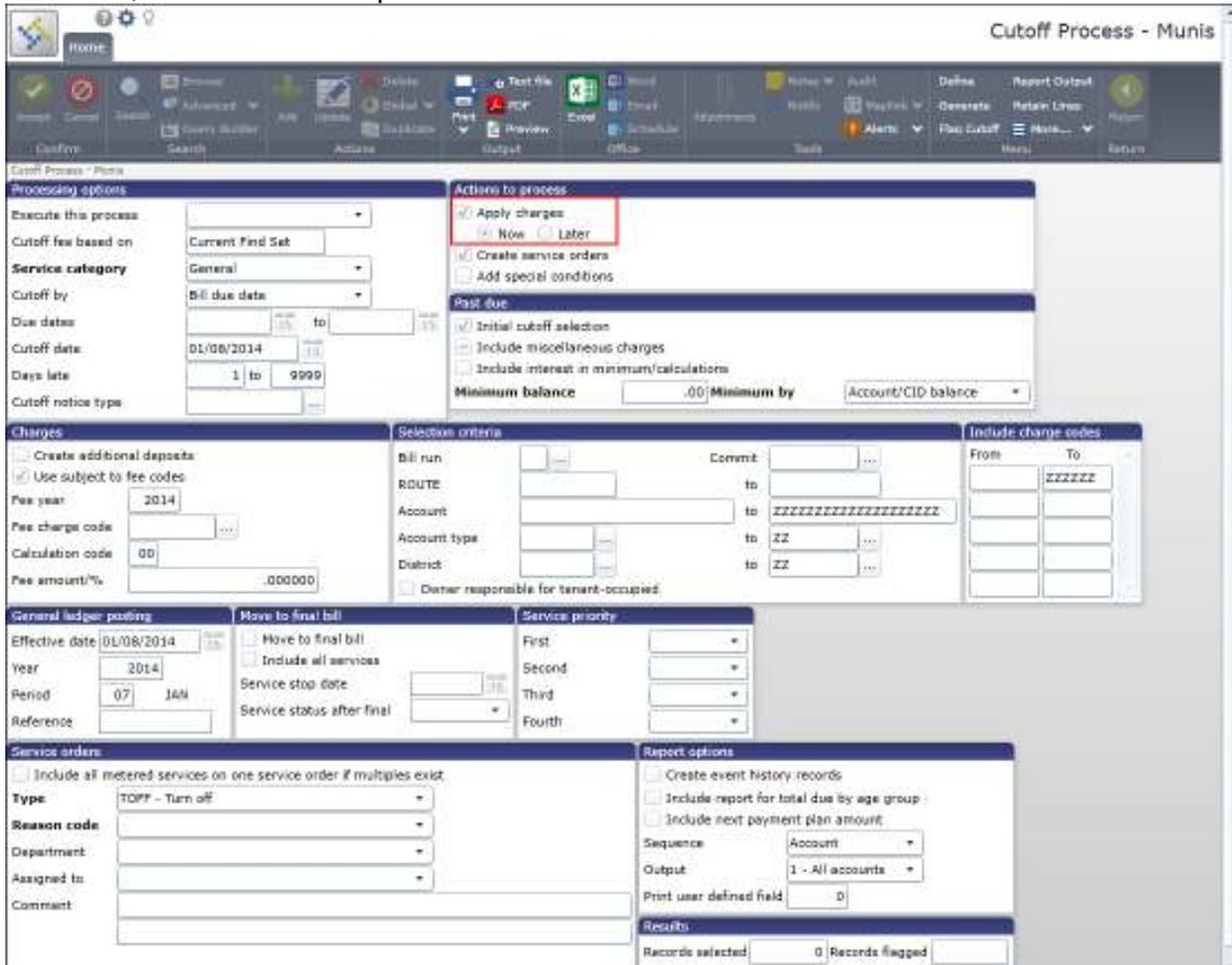
In the Calculate Budget program, these check boxes are used for initial enrollment into budget/payment plans. They are only accessible when the value of the Process By list in the Settings program is Account. In the Average Payment Plan Processing program, these fields are used with the annual recalculation/amortization process.

When you select the Include Flat Services check box, the program includes all regular flat services containing calculation code 69 and sets the budget amount to equal the base/flat amount from the current rate. For the Include Sales Tax Services check box, after budget amounts have been calculated for all other services, the program determines if any sales tax services exist on the account. If tax services exist, the program selects the budget amount from all dependency services associated with the sales tax charge code that are identified as being on a budget/payment plan, and accumulates a total. The total budget amount is then used to calculate a sales tax budget amount using the applicable sales tax rate. All dependency services should also be enrolled in the budget/payment plan, as any that are not are excluded from the calculated sales tax budget amount.

For Average Payment Plan Processing, these check boxes, if selected, direct the program to use the same functionality as described for the Calculate Budget process during the annual recalculation/amortization process.

Cutoff Process

In the Actions to Process group, the Apply Charges Now or Later option is available. When you select Later, customers can apply fees to the account after a service has been completed. In this case, the fees are not posted.



Cutoff Process - Munis

Processing options

Execute this process:

Cutoff fee based on:

Service category:

Cutoff by:

Due dates: to

Cutoff date:

Days late: to

Cutoff notice type:

Actions to process

Apply charges

Now Later

Create service orders

Add special conditions

Post due

Initial cutoff selection

Include miscellaneous charges

Include interest in minimum/calculations

Minimum balance: Minimum by:

Charges

Create additional deposits

Use subject to fee codes

Fee year:

Fee charge code:

Calculation code:

Fee amount/%:

Selection criteria

Bill run:

Account:

Account type:

District:

Denier responsible for tenant-occupied

Include charge codes

From:

To:

General ledger posting

Effective date:

Year:

Period: JAN

Reference:

Move to final bill

Move to final bill

Include all services

Service stop date:

Service status after final:

Service priority

First:

Second:

Third:

Fourth:

Service orders

Include all metered services on one service order if multiples exist

Type:

Reason code:

Department:

Assigned to:

Comment:

Report options

Create event history records

Include report for total due by age group

Include next payment plan amount

Sequence:

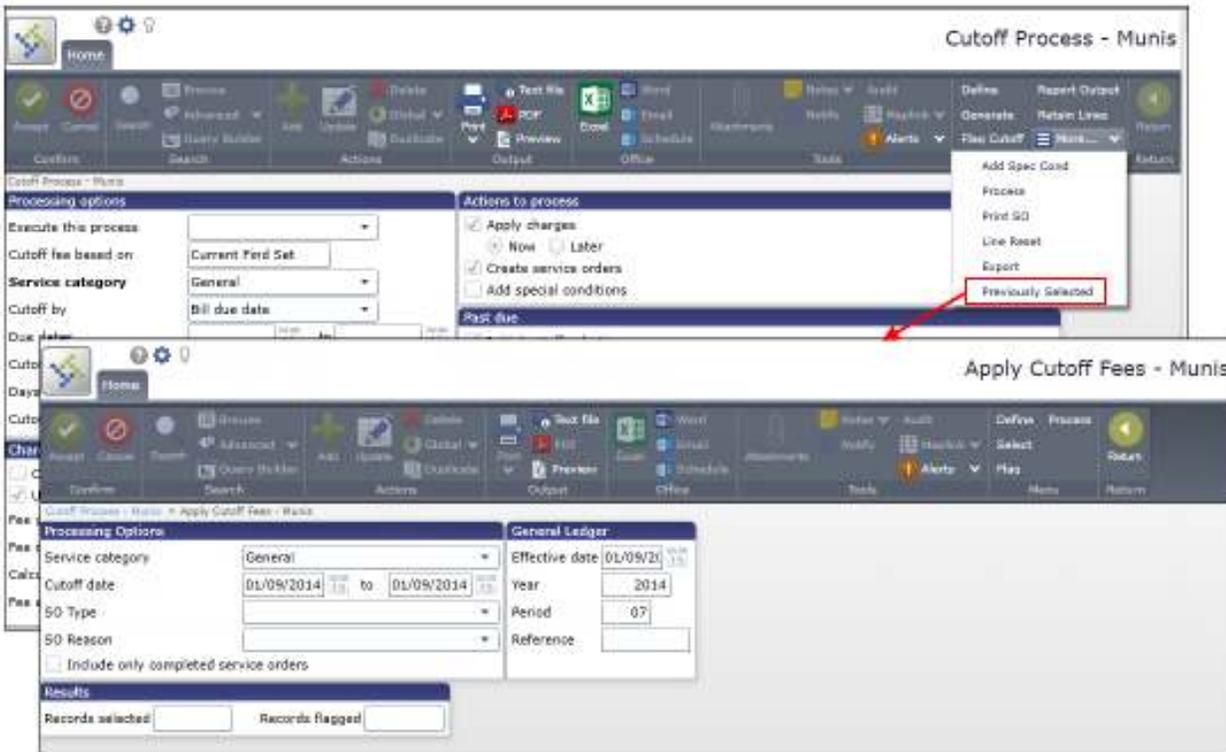
Output:

Print user defined field:

Results

Records selected: Records flagged:

When you choose to apply charges later, use the Previously Selected option on the Menu group of the ribbon to process these charges.



Delinquent Notices

When the Process Postal Certification check box is selected in the Settings program, the program uses postal certification processing when importing and exporting files. In this case, the default value of the Sequence list is Postal Certification and Export Postal and Import Postal options are available in the Menu group of the ribbon.

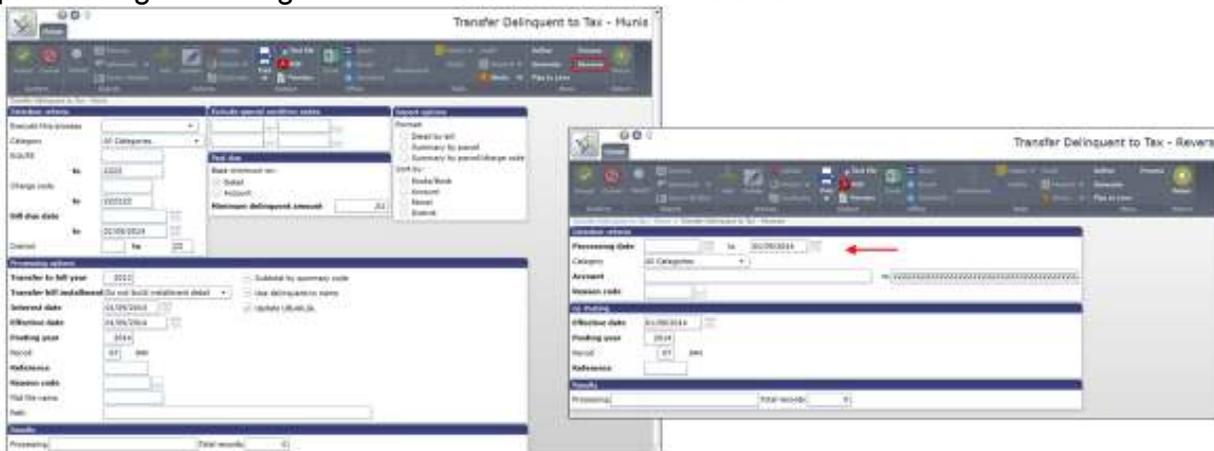


After the Select step is complete, click Export Postal to export a flat file to the spool directory. Enter a file name in the Export File Name box in the Postal Certification group and click Accept to create the file. Once the file is stored on the spool directory, the program displays a query box that provides the option to send the file to your PC. Click Yes; the program displays the file path. Update the file to include the output sequence order for the XML file. Once the file is updated, click Import Postal from the Menu group of the ribbon to import the updated file back into the Munis database. The program automatically resorts the bills.

If you are using postal certification processing and you select an output option prior to updating the postal file, the program displays a reminder.

Transfer Delinquent to Tax

The Transfer Delinquent to Tax program includes the Reverse option. When you select Reverse, the program displays the Reverse screen, where you can define the original processing date range for which the bills were transferred to Tax.



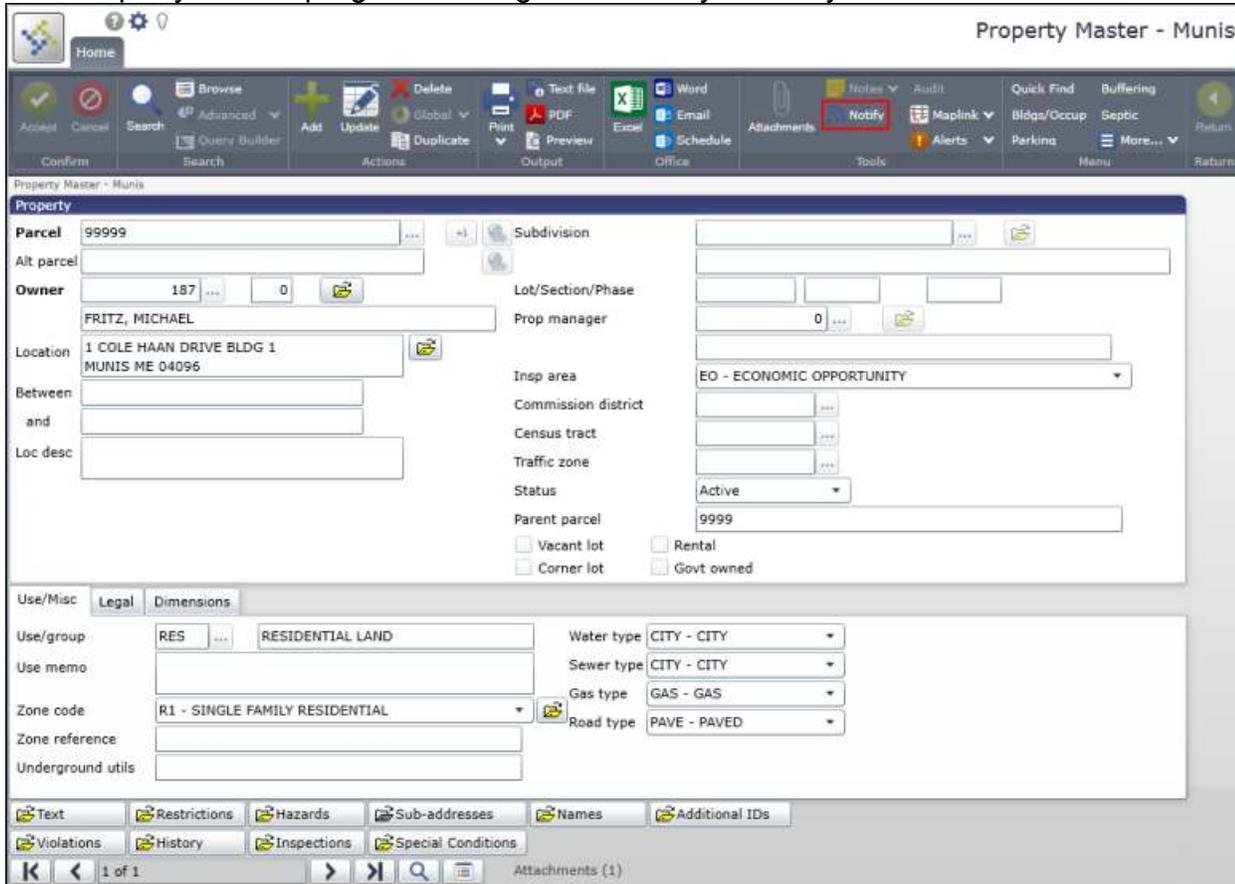
When you generate the reversal, use the Flag to Levy option to identify each account to which the reversal applies. Click Process to complete the reversal.

For completed reversals, Account Customer Inquiry includes the amounts that are once again included on the utility bill.

Tyler Notify 10.5

Munis is integrated with Tyler Notify to provide automated electronic notifications through telephone calls or emails. If your organization has installed and configured Tyler Notify, the Notify option is available in in the Tools group of the Munis ribbon.

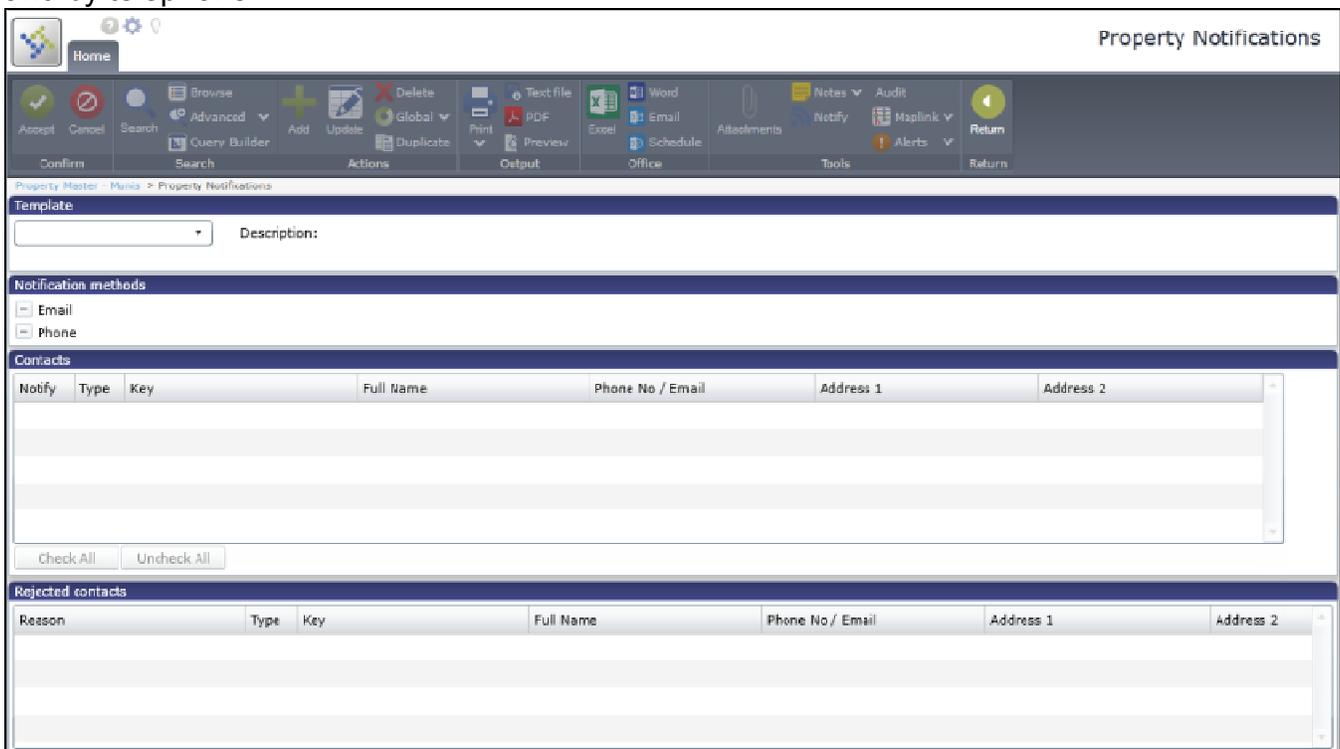
The Property Master program is integrated with Tyler Notify.



When you click the Notify button in the Tools group on the ribbon, the Notification Recipients screen displays where you can select the type of contact for the notification: Property Owner, Property Manager, or Property Names.



The Property Notifications screen provides a predefined template and the notification methods to send the message. If the customer record has a telephone number and an email address, select the Email and Phone check boxes and the customer will receive the notification by email and by telephone.



System Administration - Revenue Roles 10.5

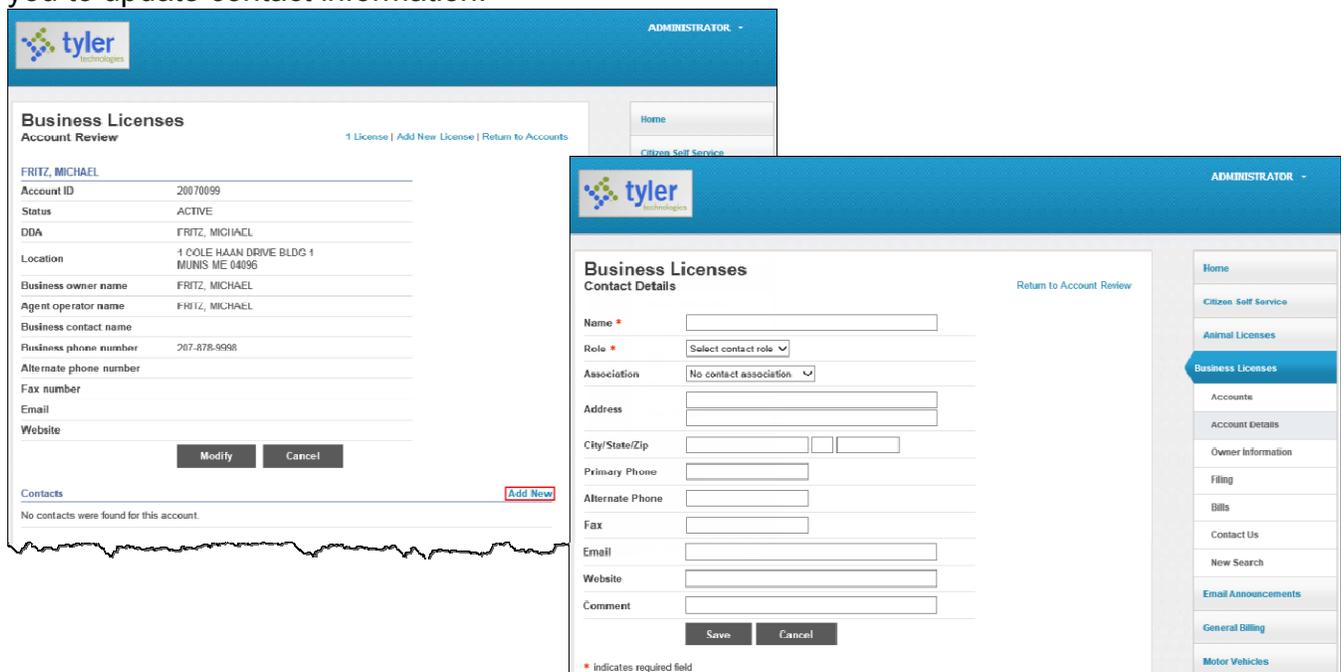
Module	Field Name	Description
Permits and Code Enforcement		
		<p>The Permits and Code Enforcement Roles screen is reorganized to include the Permit Applications/Contractors, Inspections/Violations, and Collections/Others tabs, in addition to the Property Role Permissions tab.</p> <p>The Permit Applications/Contractors tab includes the Add Plan Reviews, Update Plan Reviews, Delete Plan Reviews, Access Electronic Plan Reviews, Start Electronic Plan Reviews, Add Plan Reviews to Application with ePlans, Update Plan Reviews on Application with ePlans, and Delete Plan Reviews from Application with ePlans check boxes for use with electronic plan review software.</p> <p>Note: These permissions are intended for future functionality.</p>

Citizen Self Service 10.5

The Munis Self Service programs available for the Revenues product are included in Citizen Self Service (CSS). The following changes apply to Munis Citizen Self Service programs.

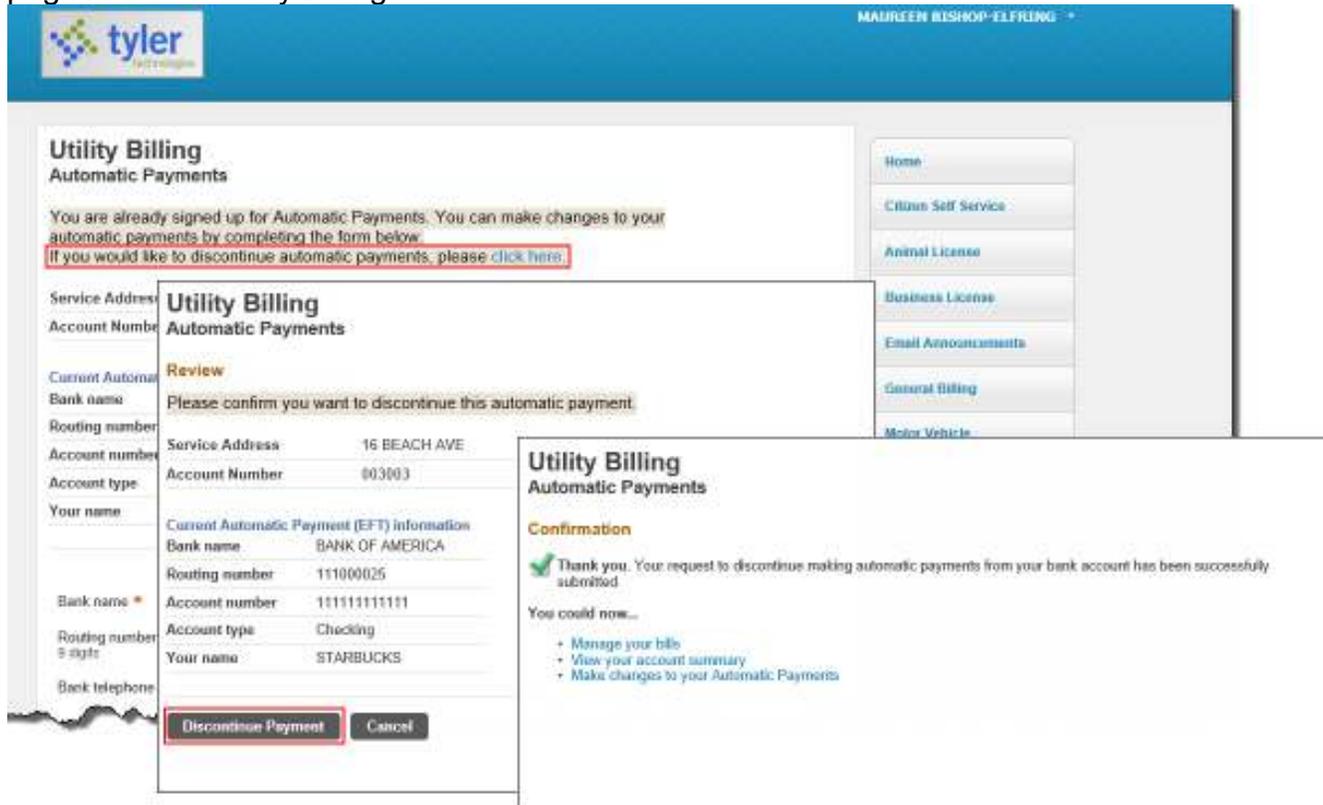
Business Licenses

When you click Accounts in the Business License module, the Add New button is available in the Contacts group to add new contacts. The Modify button on the Contacts Detail page allows you to update contact information.



Utility Billing

When the Activate Automatic Account Payments and the Update Munis EFT When Users Modify Automatic Payment Settings check boxes are selected in CSS administration for Utility Billing, the Discontinue Automatic Payments option is available on the Automatic Payments page in CCS - Utility Billing.



The screenshot shows the Tyler Technologies web interface for 'Utility Billing Automatic Payments'. The user is logged in as MAUREEN BISHOP-ELFRING. The page title is 'Utility Billing Automatic Payments'. A navigation menu on the right includes: Home, Citizen Self Service, Animal License, Business License, Email Announcements, General Billing, and Motor Vehicle.

The main content area is divided into two sections:

- Review:** A message states, 'Please confirm you want to discontinue this automatic payment.' Below this, the current automatic payment details are listed:

Service Address	16 BEACH AVE
Account Number	003003
Current Automatic Payment (EFT) Information	
Bank name	BANK OF AMERICA
Routing number	111000025
Account number	11111111111
Account type	Checking
Your name	STARBUCKS
- Confirmation:** A message with a green checkmark states, 'Thank you. Your request to discontinue making automatic payments from your bank account has been successfully submitted.' Below this, it says 'You could now...' followed by a list of links:
 - Manage your bills
 - View your account summary
 - Make changes to your Automatic Payments

At the bottom of the 'Review' section, there are two buttons: 'Discontinue Payment' (highlighted with a red box) and 'Cancel'.

When you select this option, CSS displays the automatic payment details for review, along with the Discontinue Payment button. When you click Discontinue Payment, the program displays a confirmation page and removes the EFT information for the account from Munis.