Munis Revenues

Major Enhancements
Version 10.4 to 10.5

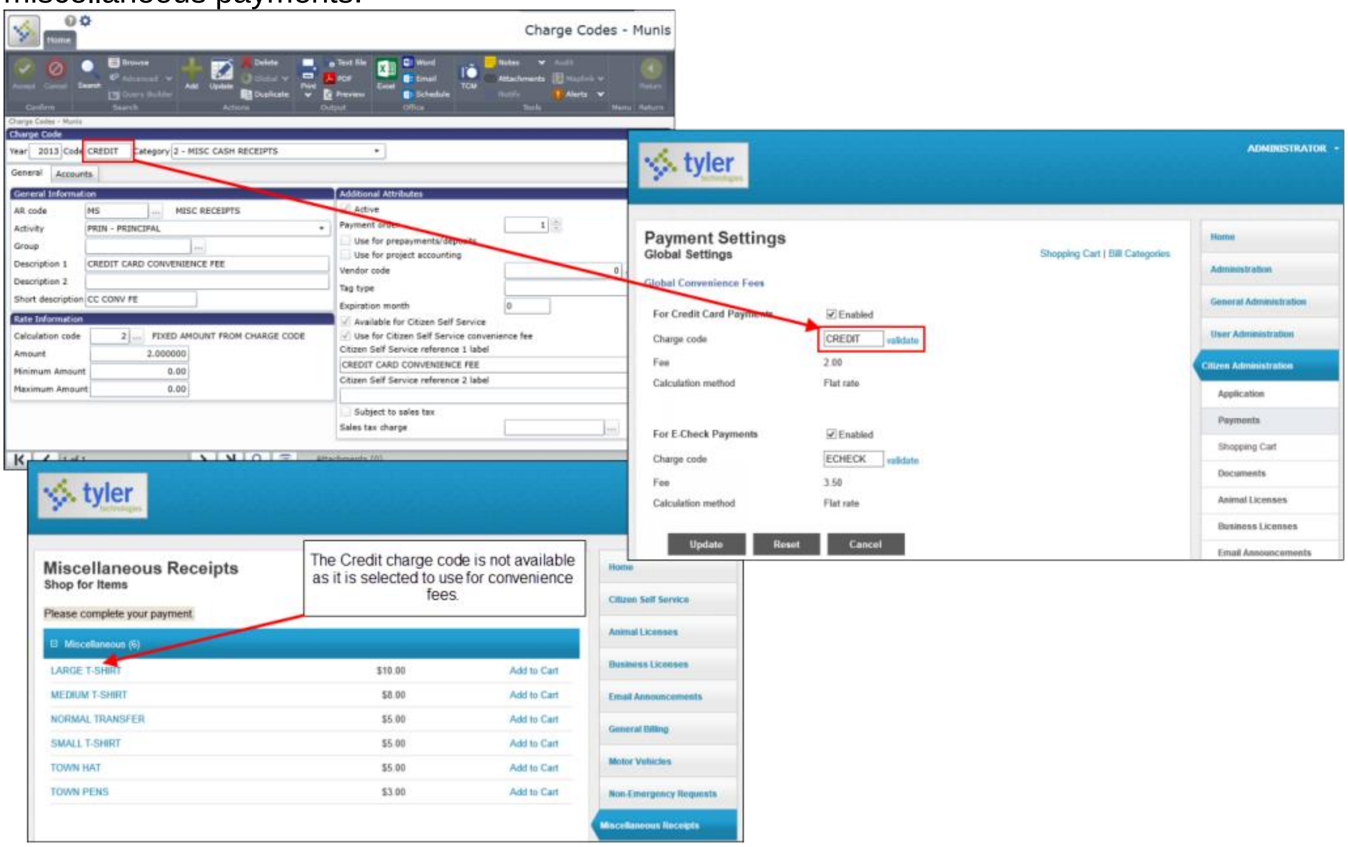
For more information, visit www.tylertech.com.

Accounts Receivable Version 10.4

The following changes apply to Munis Accounts Receivable programs.

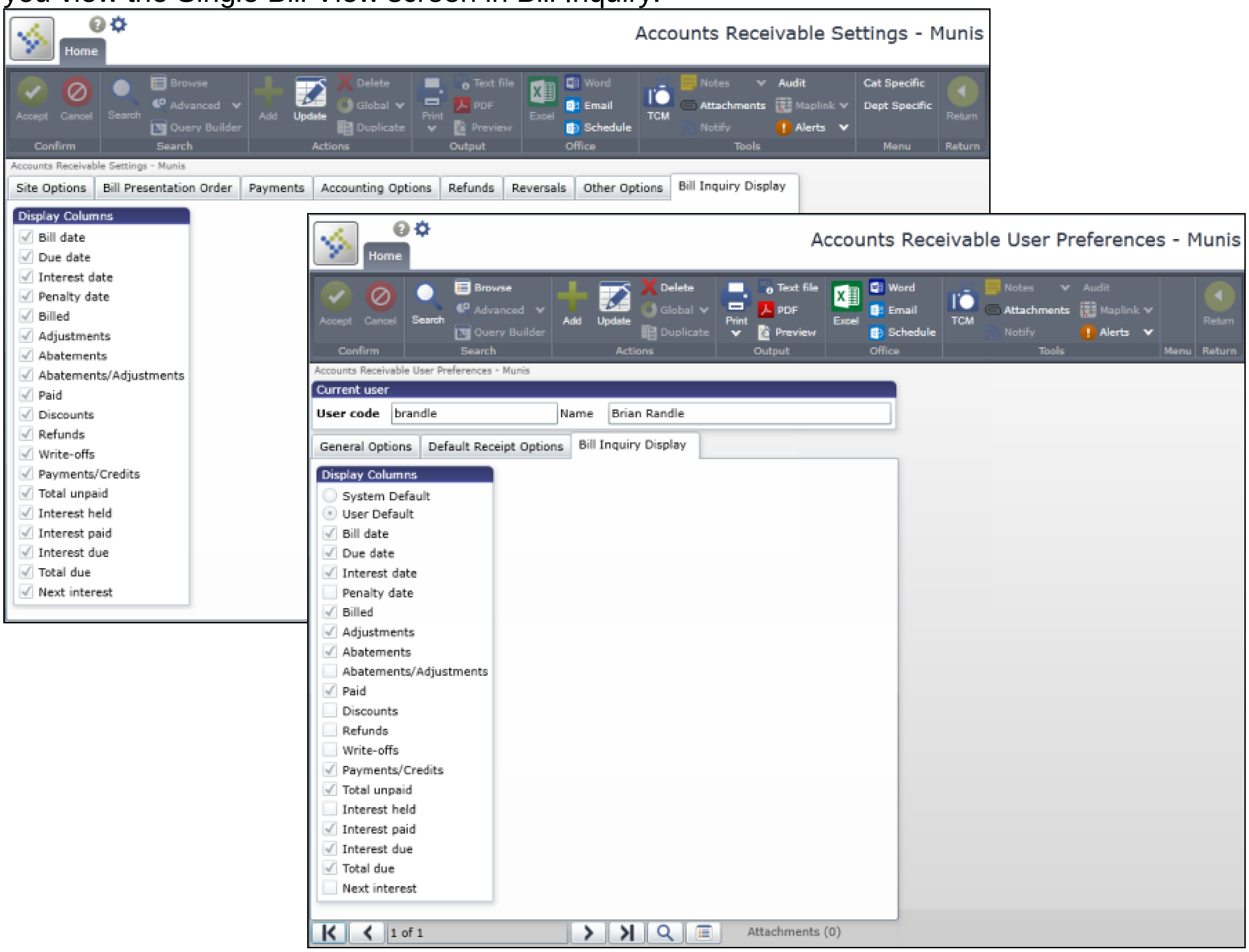
Accounts Receivable Charge Codes

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.



Account Receivables Settings, Accounts Receivable User Preferences

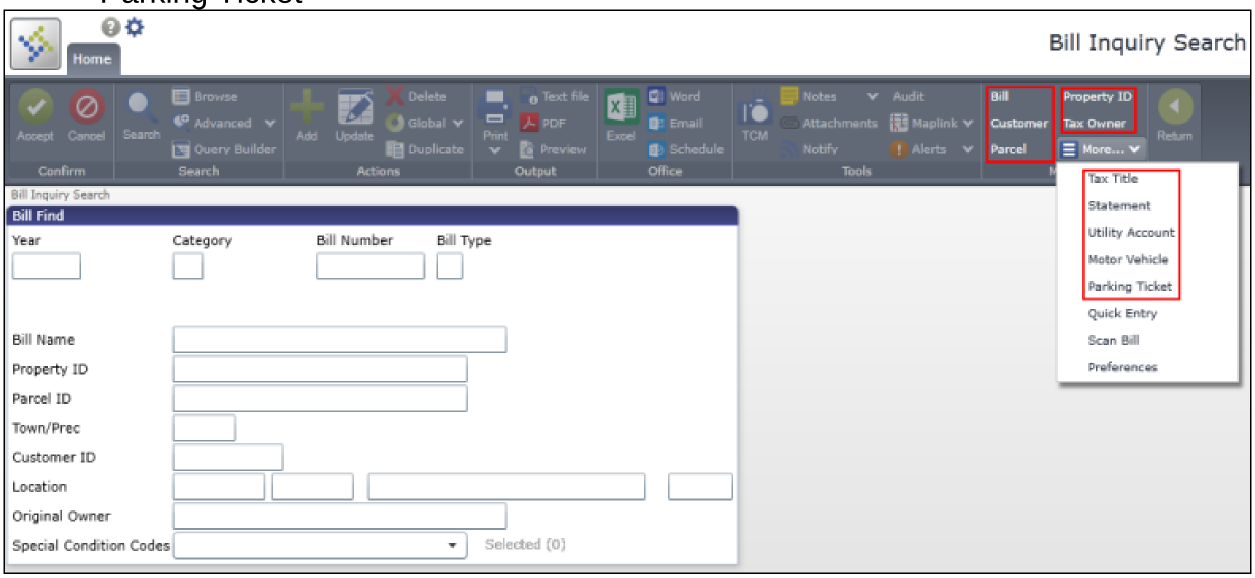
The Bill Inquiry Display tab in Accounts Receivable Settings provides check boxes for items to display on the Single Bill View screen in Bill Inquiry for all users. The Bill Inquiry Display tab is Accounts Receivable User Preferences allows you to determine which items to display when you view the Single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



Bill Inquiry

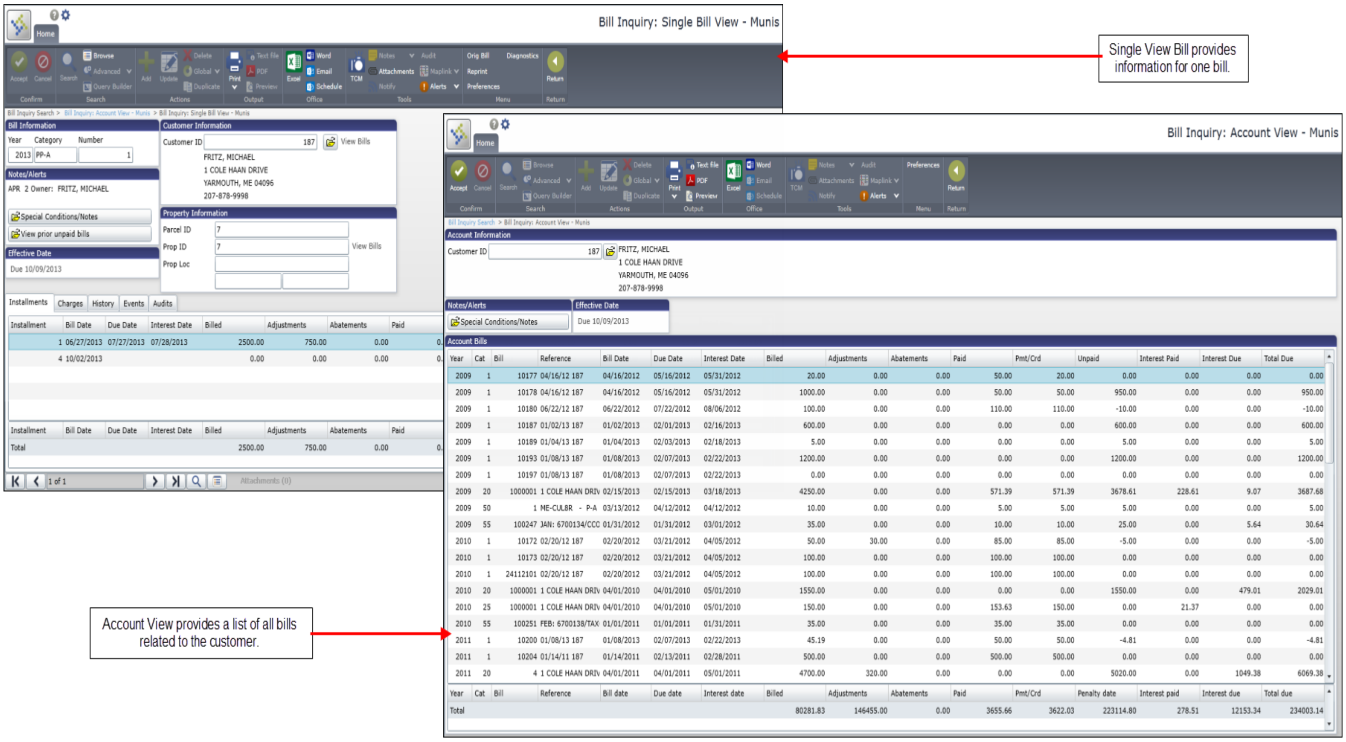
Bill Inquiry is modified to display the Bill Inquiry Search screen as the program opens. Search options on the screen include:

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



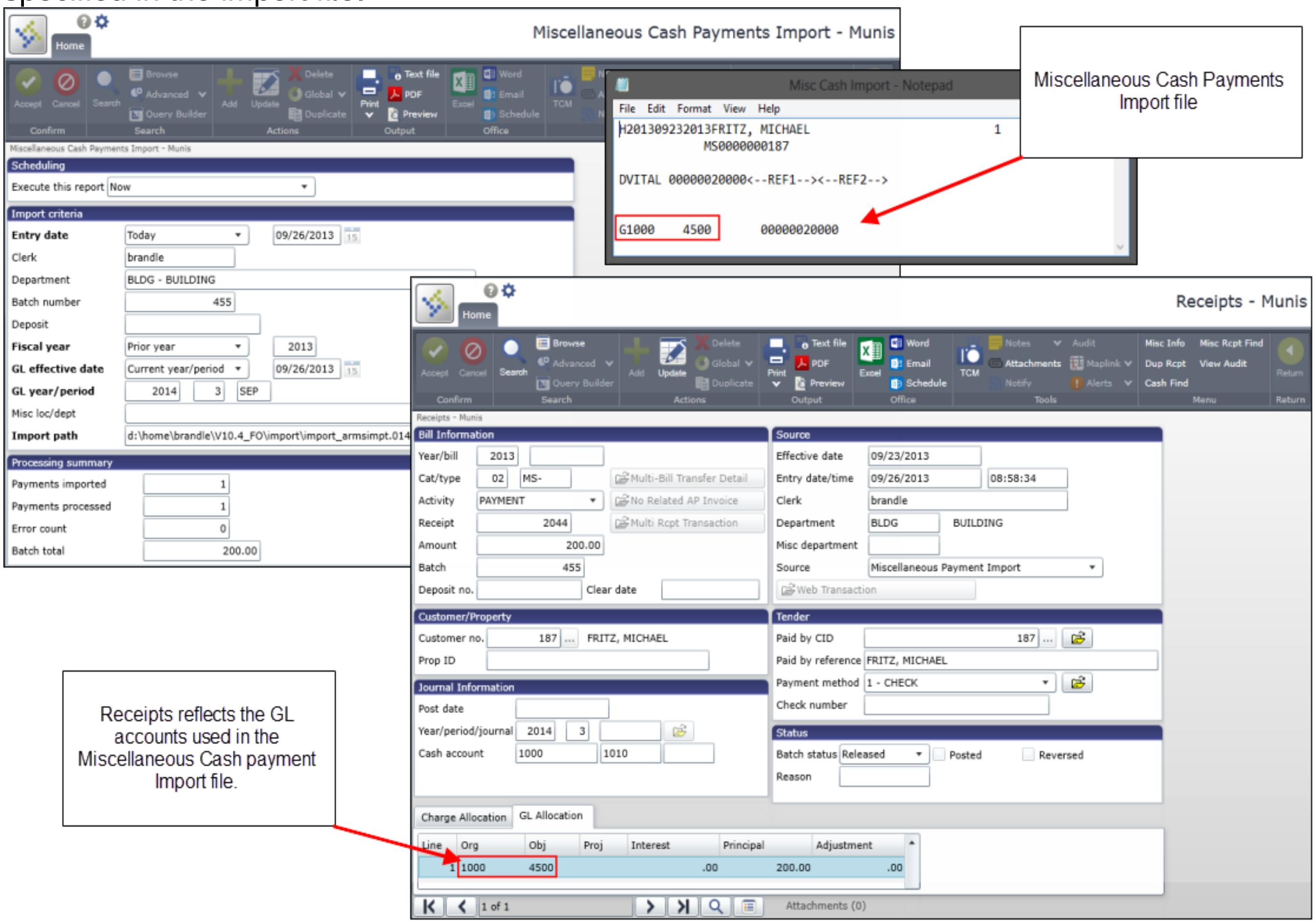
Other options include Quick Entry, Scan Bill, and Preferences (Accounts Receivable User Preferences).

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.



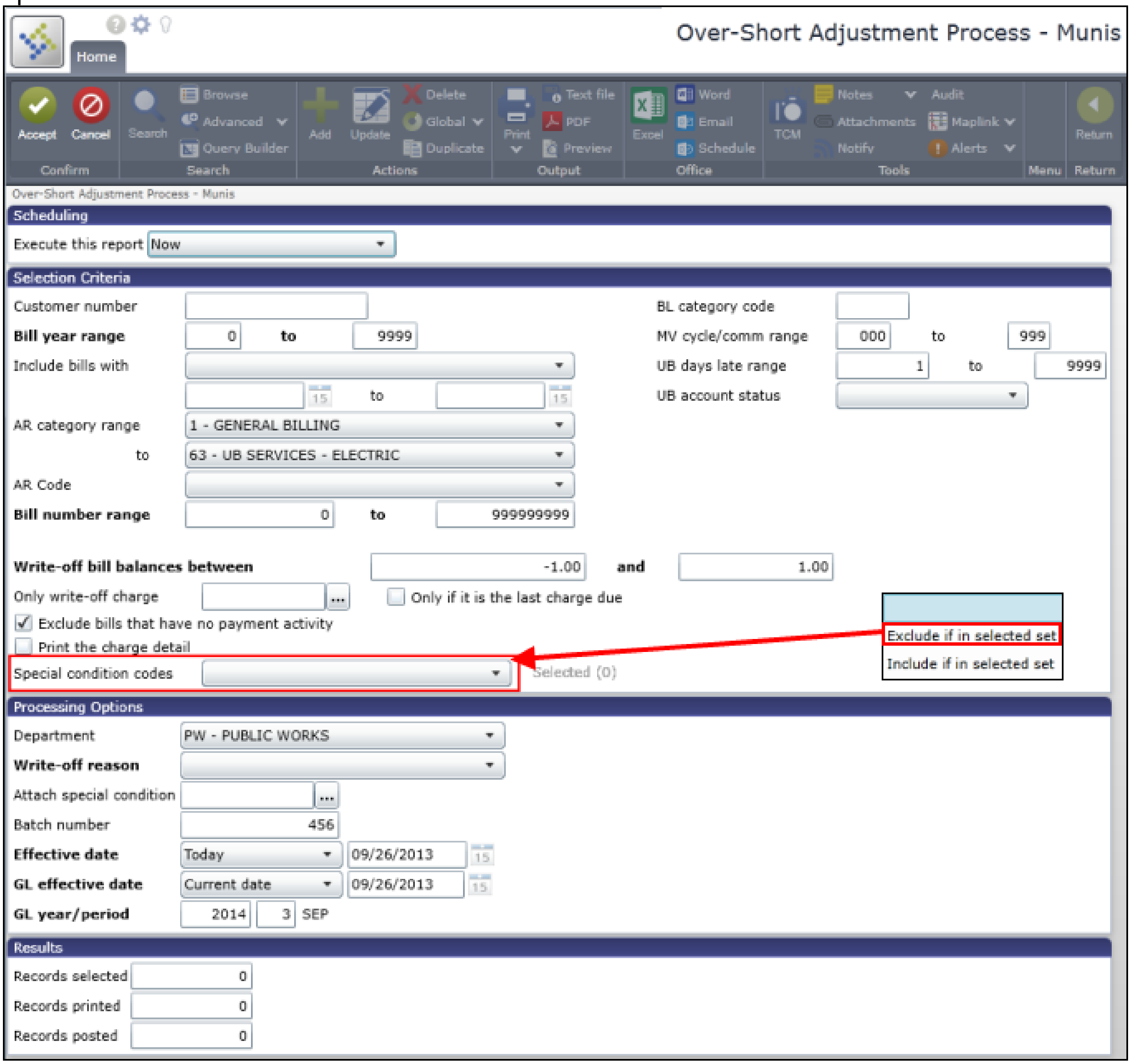
Miscellaneous Cash Payments Import

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.



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.

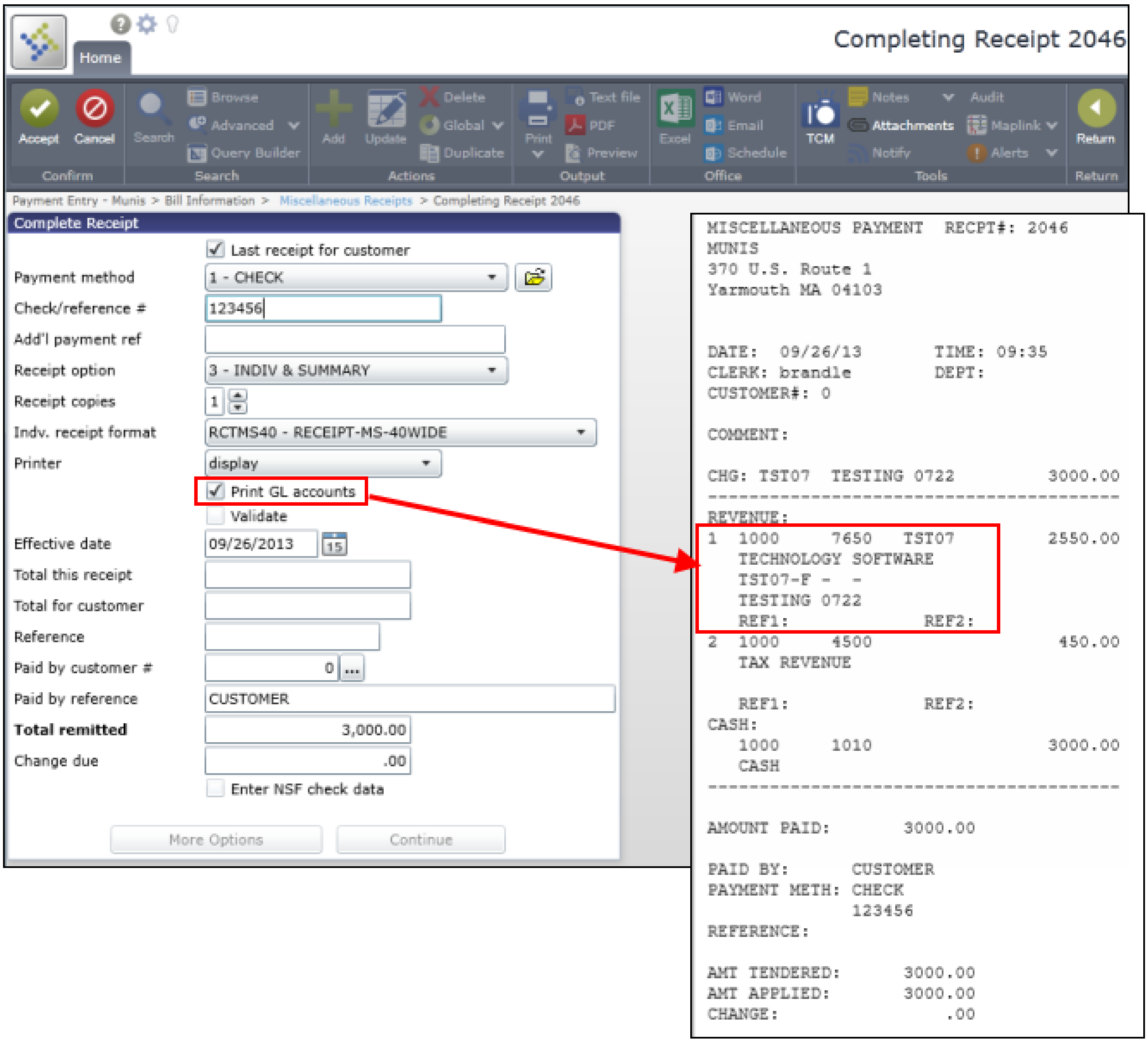


Payment Entry

The following changes apply to the Payment Entry program.

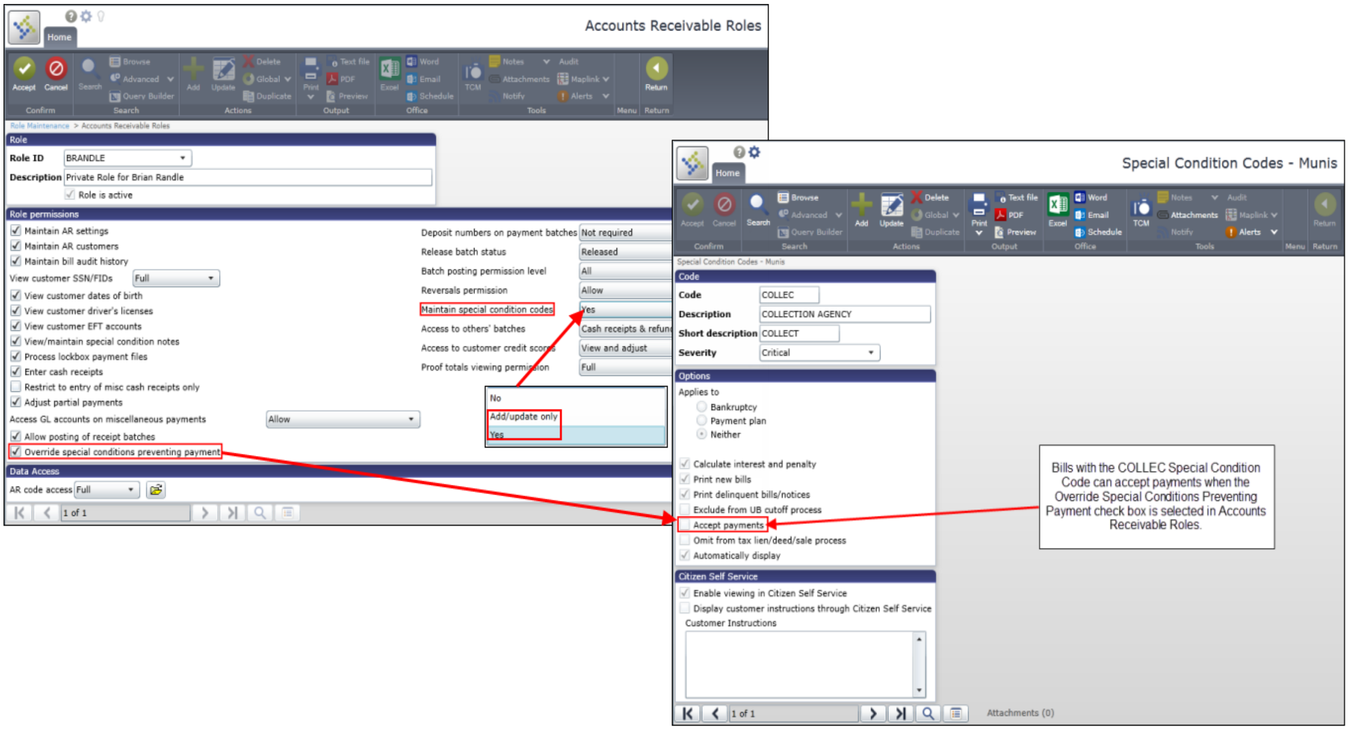
Miscellaneous Cash Receipts

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.



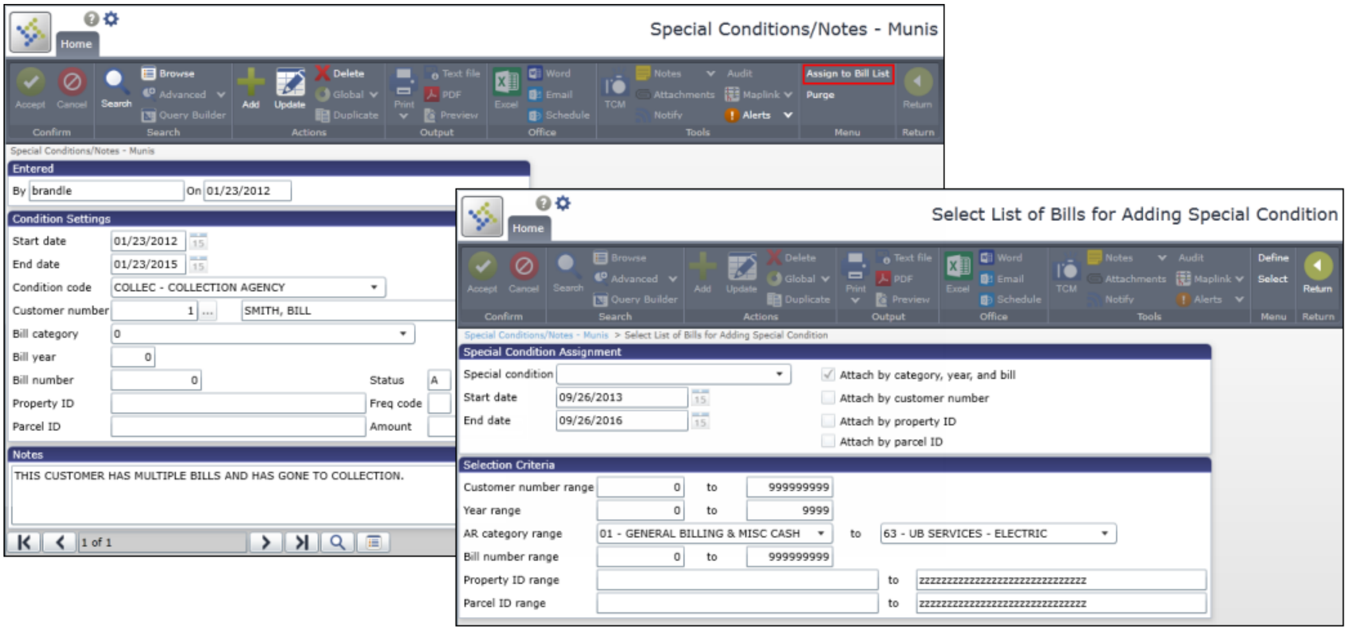
Special Conditions

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.



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.

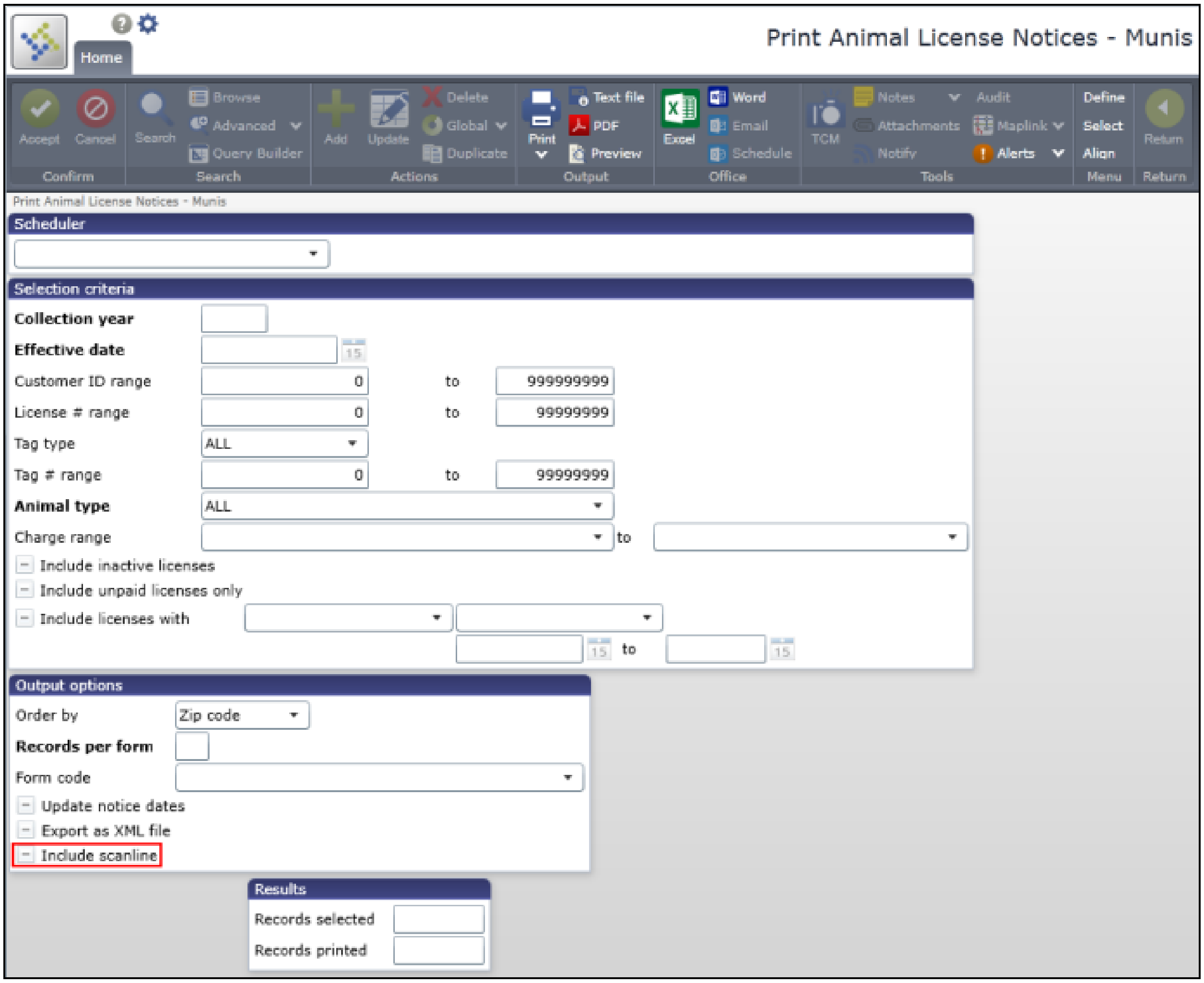


Animal Licenses Version 10.4

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.

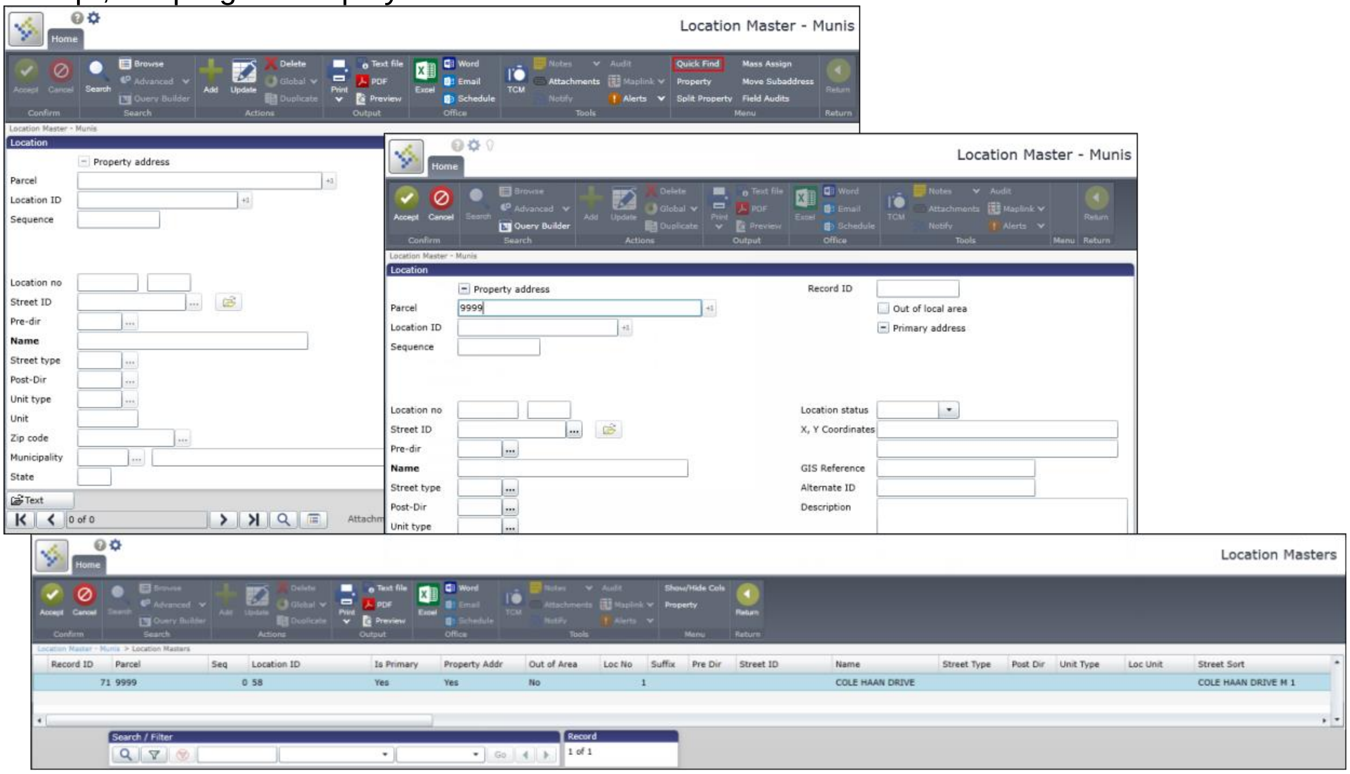

Print Animal License Notices - Munis
Home
Accept
Cancel
Confirm
Search
Browse
Advanced
Query Builder
Search
Add
Update
Delete
Global
Duplicate
Actions
Print
Text file
PDF
Preview
Output
Excel
Word
Email
Schedule
Office
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Tools
Define
Select
Align
Menu
Return
Return
Print Animal License Notices - Munis
Scheduler
Selection criteria
Collection year
Effective date
Customer ID range
0
to
999999999
License # range
0
to
99999999
Tag type
ALL
Tag # range
0
to
99999999
Animal type
ALL
Charge range
to
Include inactive licenses
Include unpaid licenses only
Include licenses with
to
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.

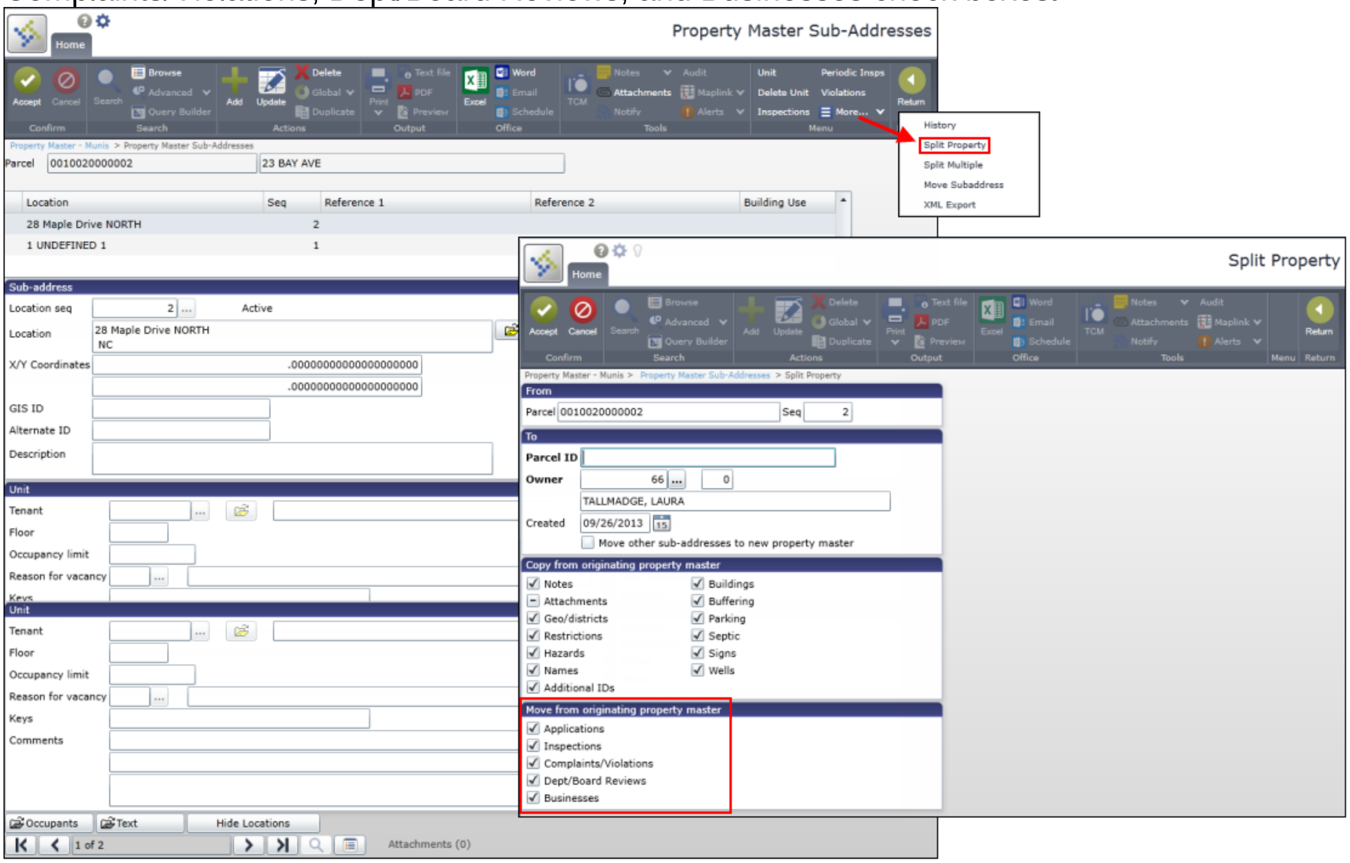
Location Master and Property Master

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.

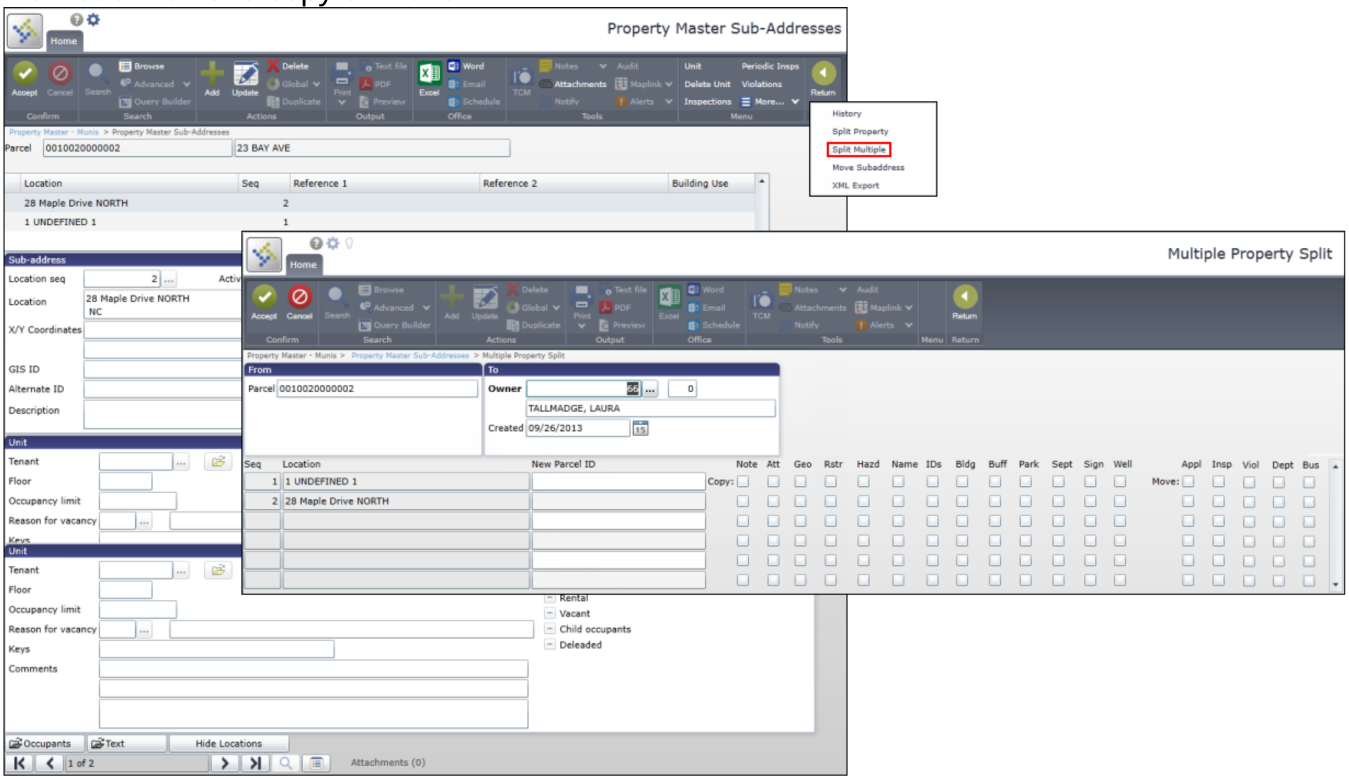


Property Master

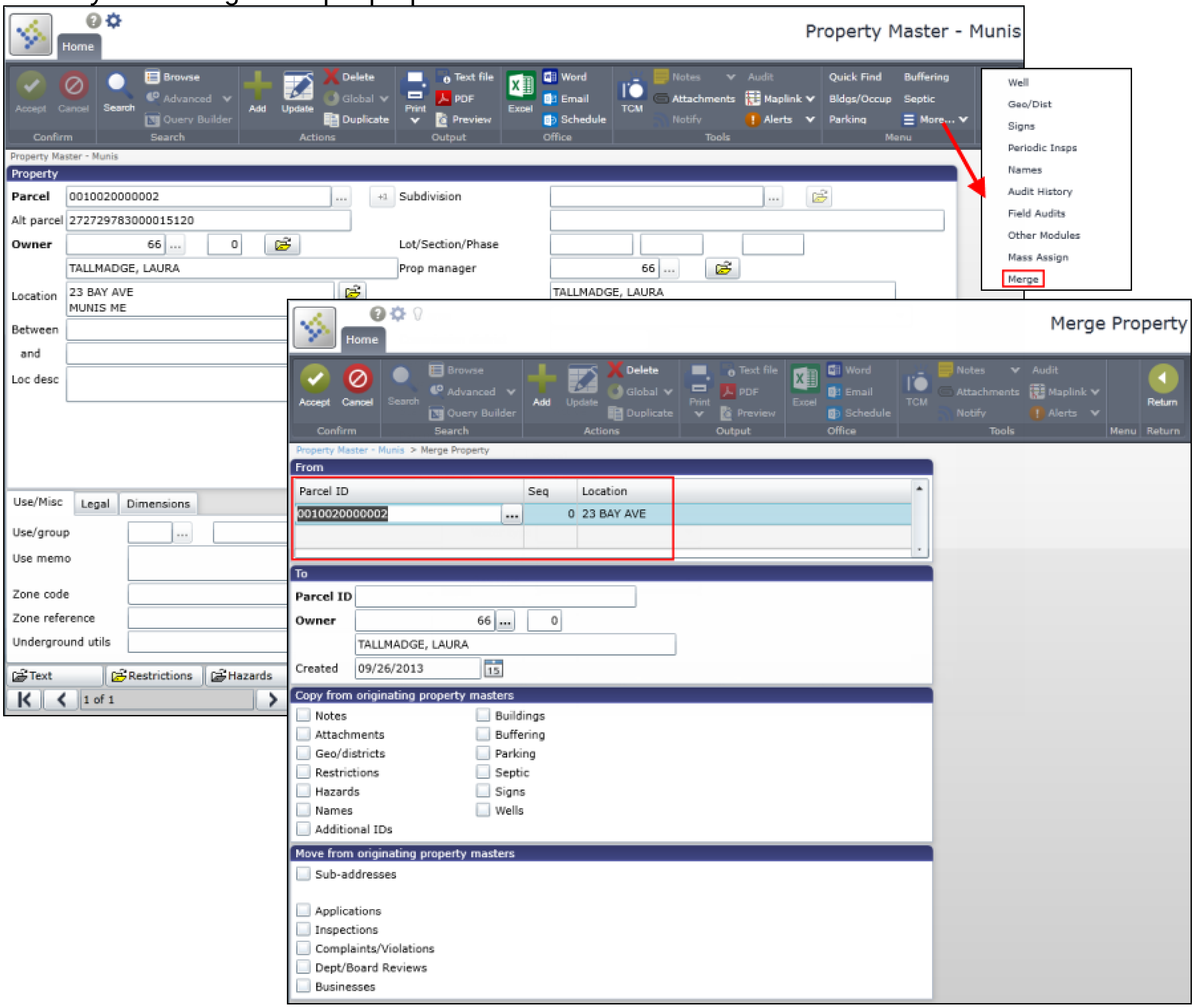
When you click the Split Property button on the Sub-Addresses screen of Property Master, the Move from Originating Property Master group includes the Applications, Inspections, Complaints/Violations, Dept/Board Reviews, and Businesses check boxes.



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.



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

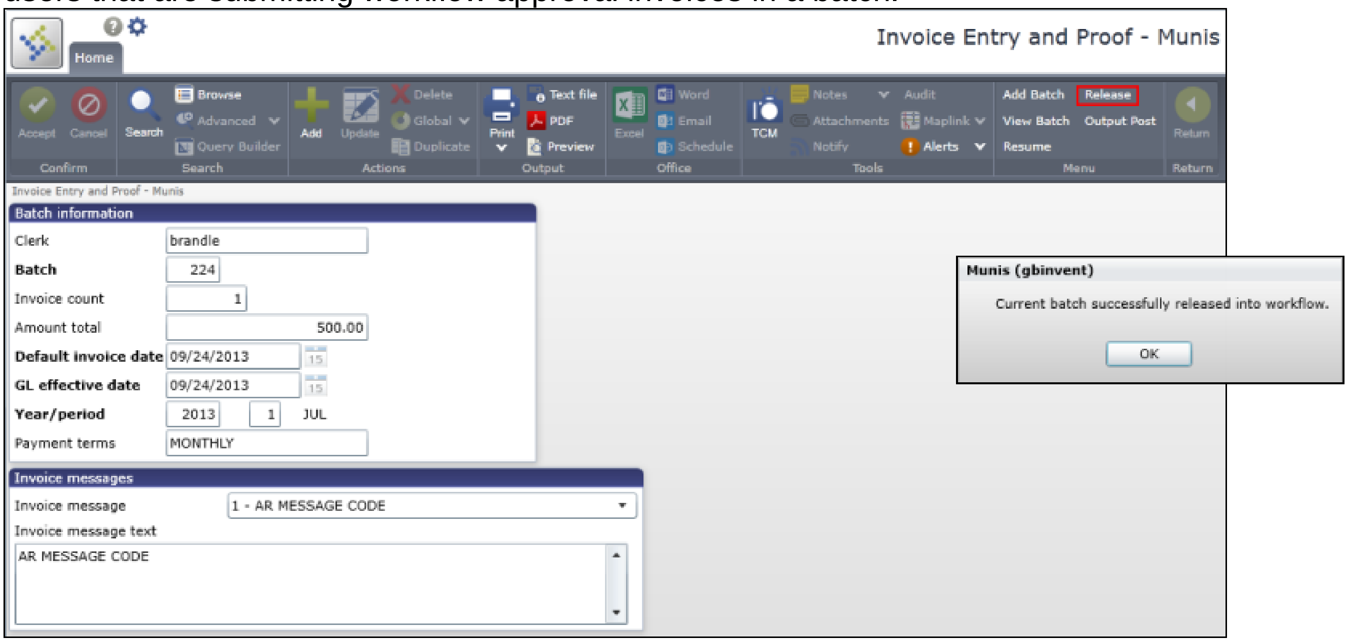


General Billing Enhancements Version 10.4

The following changes apply to Munis General Billing programs.

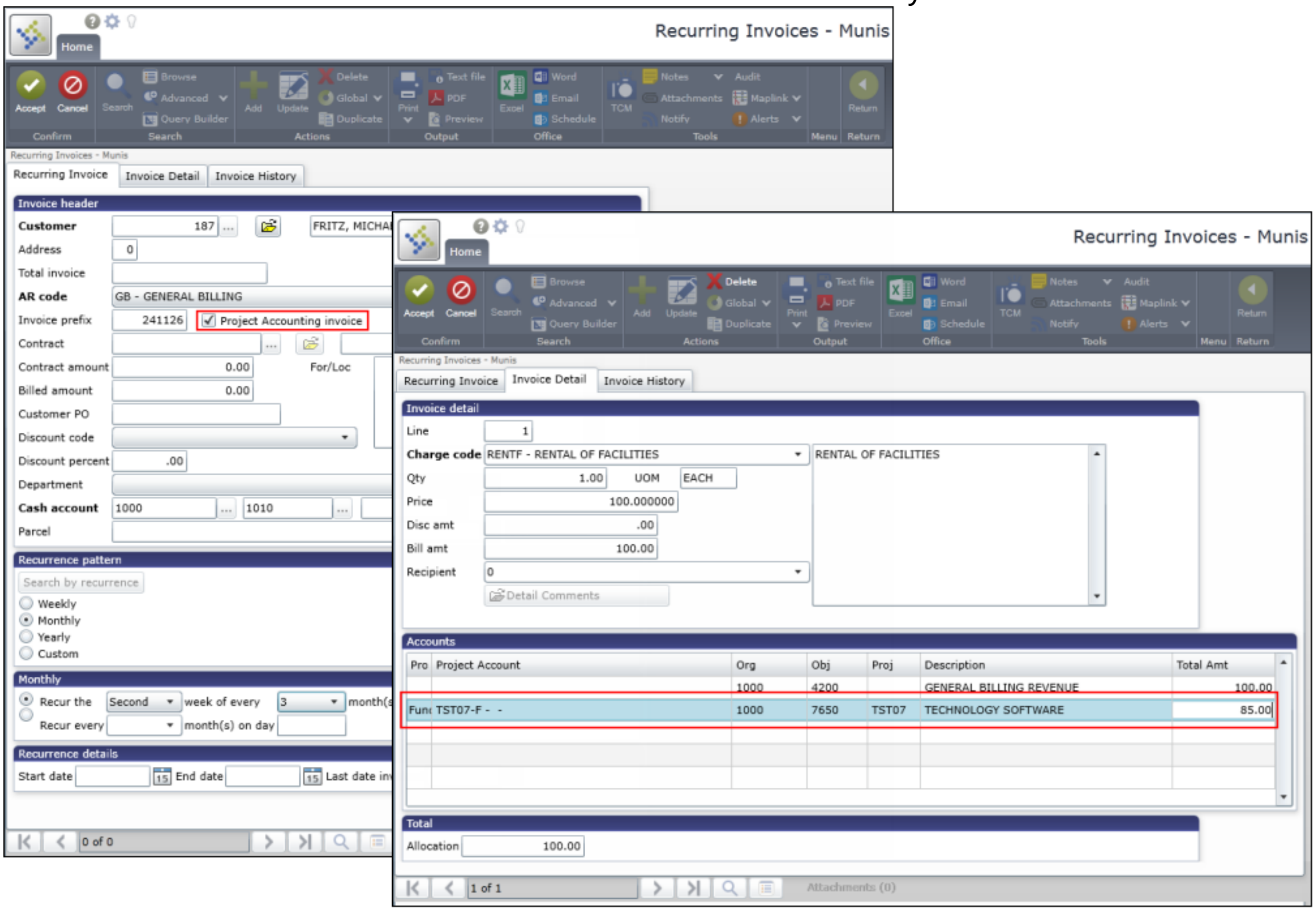
Invoice Entry and Proof

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.



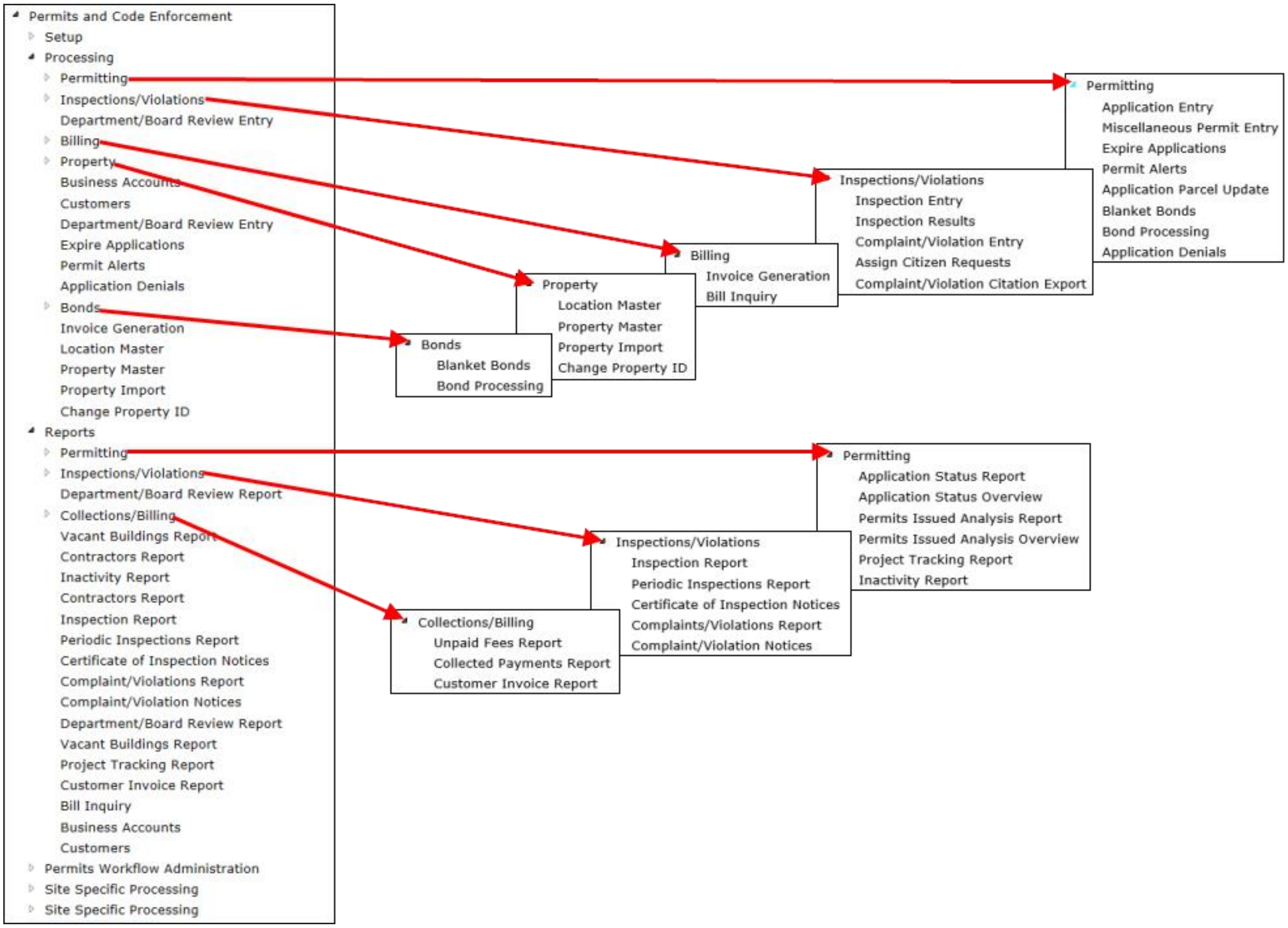
Permits and Code Enforcement Version 10.4

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

Permit and Code Enforcement Menu

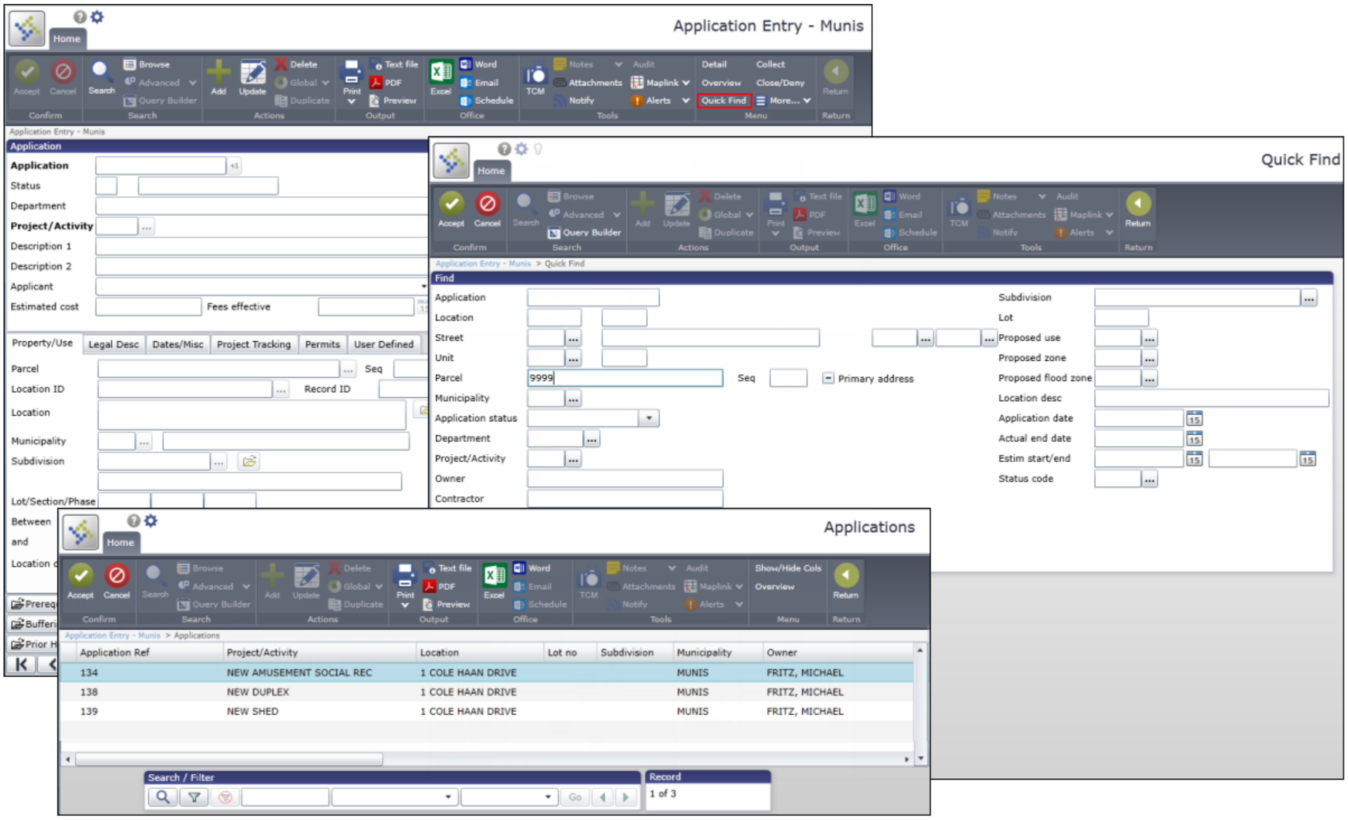
The Permits and Code Enforcement menu is restructured. The following list includes programs that moved from one menu to another menu:

- 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.



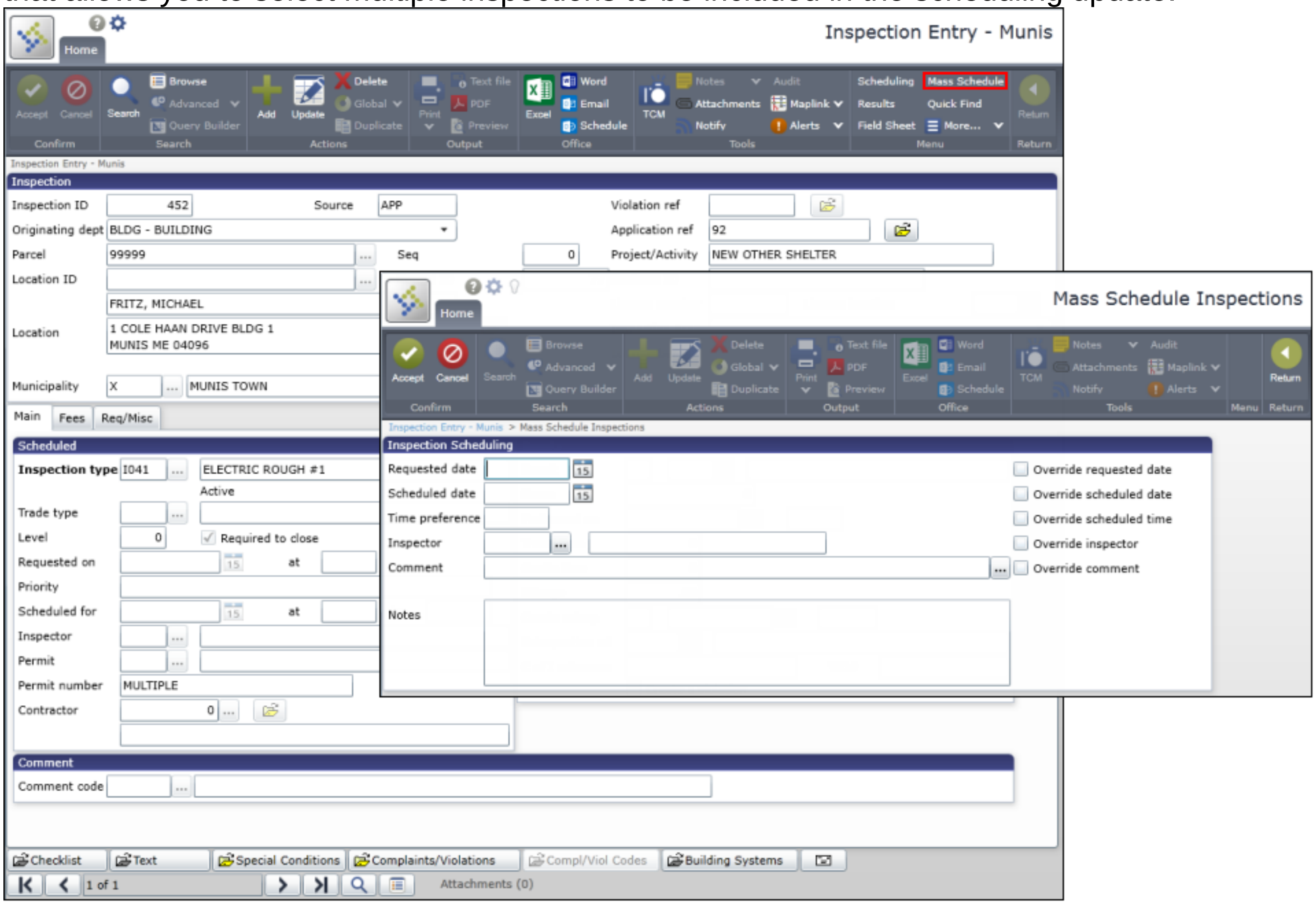
Application Entry, Department/Board Review Entry, Inspection Entry

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
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Print
Text file
PDF
Preview
Excel
Word
Email
Schedule
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Detail
Overview
Quick Find
Collect
Close/Deny
More...
Return
Confirm
Actions
Output
Office
Tools
Menu
Application
Status
Department
Project/Activity
Description 1
Description 2
Applicant
Estimated cost
Fees effective
Property/Use
Legal Desc
Dates/Misc
Project Tracking
Permits
User Defined
Parcel
Seq
Location ID
Record ID
Location
Municipality
Subdivision
Lot/Section/Phase
Between
and
Quick Find
Find
Application
Location
Street
Unit
Parcel
9999
Primary address
Municipality
Application status
Department
Project/Activity
Owner
Contractor
Subdivision
Lot
Proposed use
Proposed zone
Proposed flood zone
Location desc
Application date
Actual end date
Estim start/end
Status code
Applications
Show/Hide Cols
Overview
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
Go
Record
1 of 3

Inspection Entry

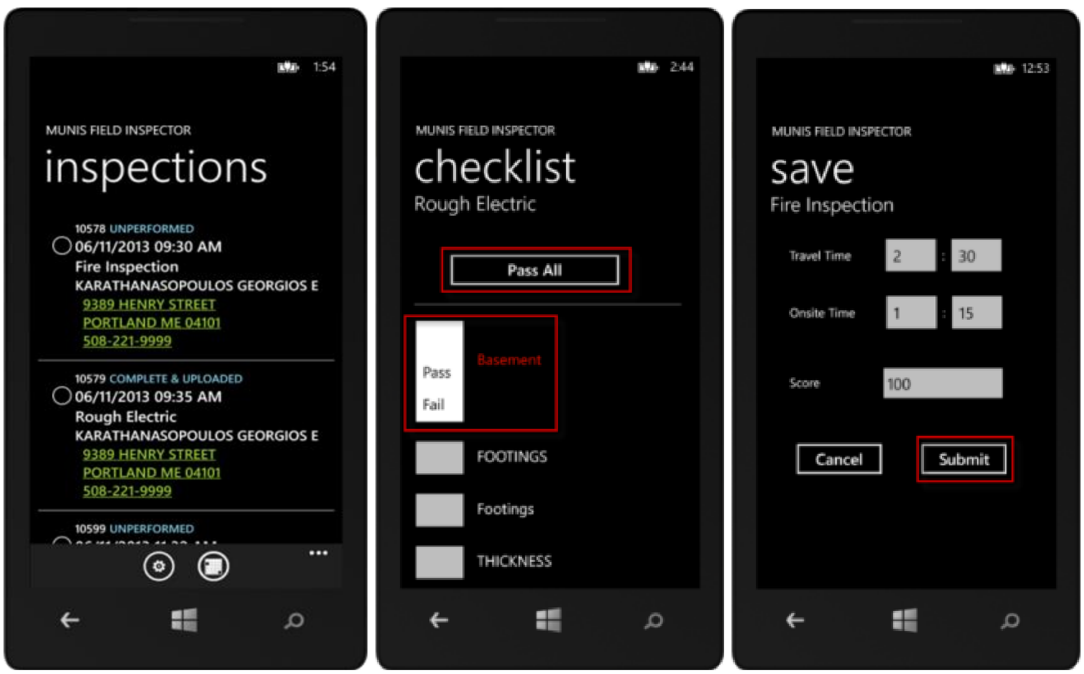
The Mass Schedule button in Inspection Entry displays a screen where you can enter a single requested date, scheduled date/time, inspector, and comment to be applied to each unscheduled inspection. The Mass Schedule Inspections screen presents a browse screen that allows you to select multiple inspections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



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.

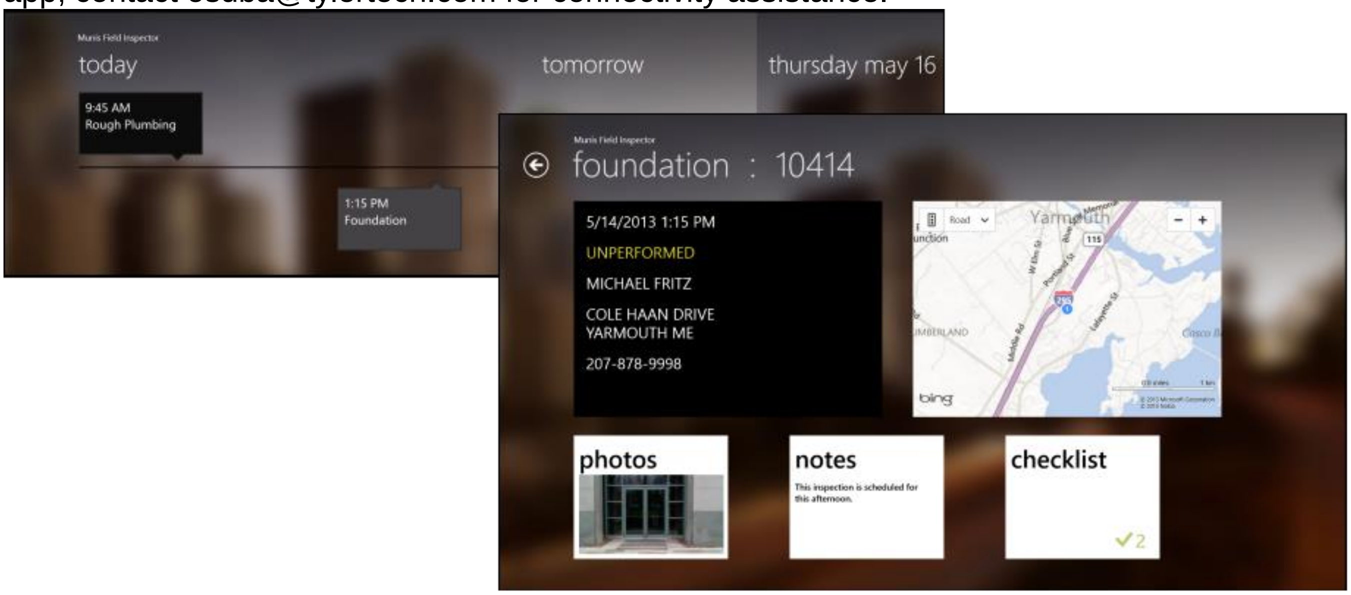


Please refer to the Munis Field Inspector Application – Windows 8 Phones document in the Munis KnowledgeBase for more information about the application.

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.



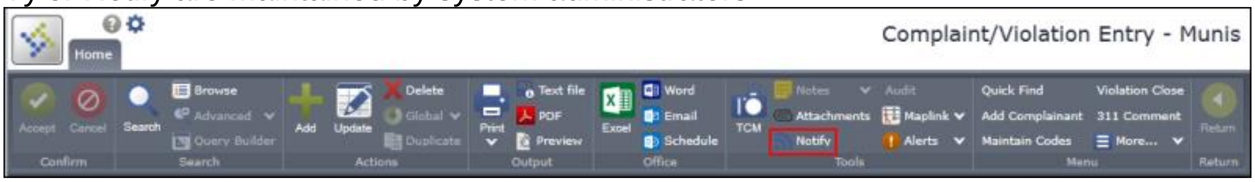
Please refer to the Munis Field Inspector Application – Windows 8 Tablet document in the Munis KnowledgeBase for more information about the application.

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

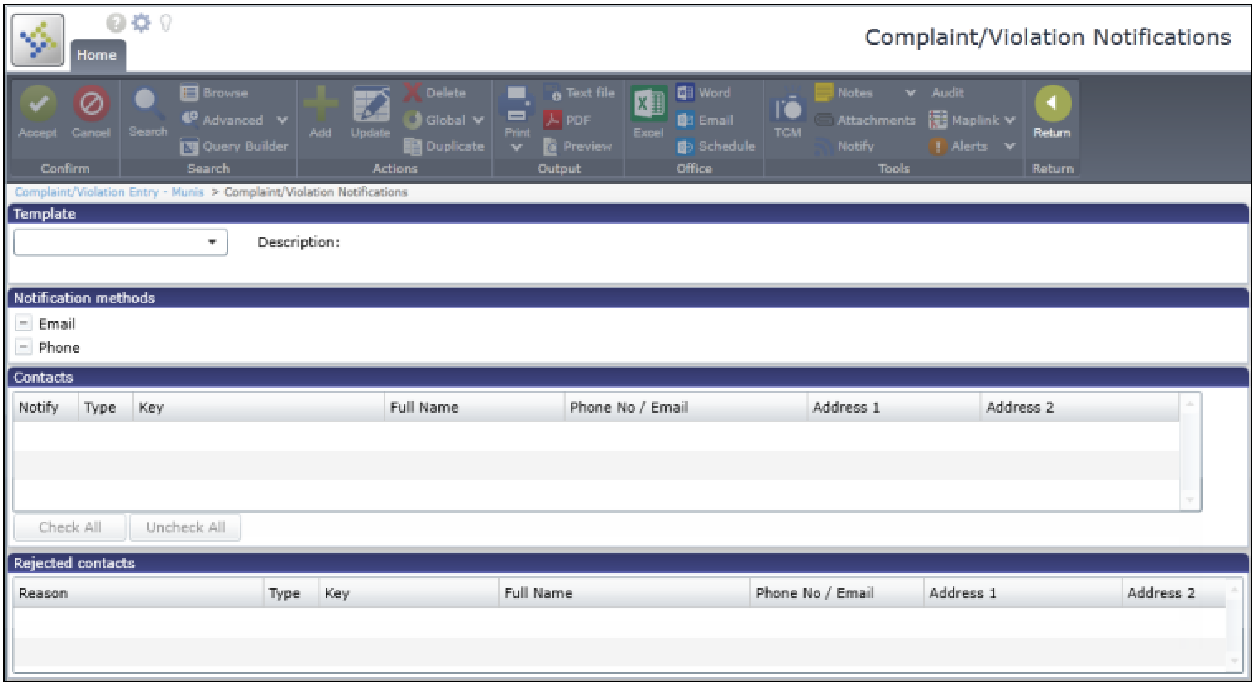
Munis is integrated with Tyler Notify to provide automated electronic notifications through telephone calls or emails. This feature requires that you purchase and install Tyler Notify. Once installed, the connection to Tyler Notify must be configured by entering the Tyler Notify base URL and Tyler Notify 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.

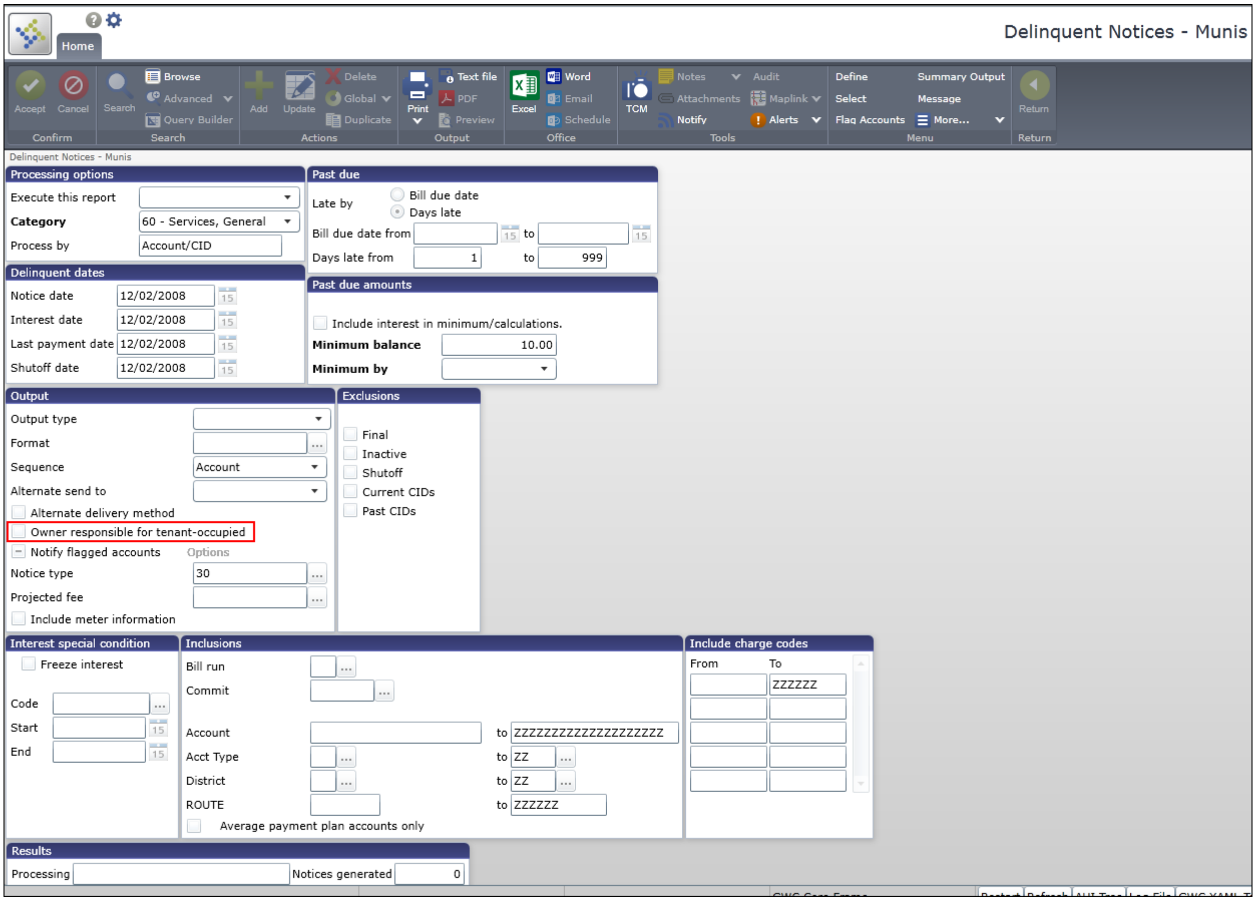


Utility Billing – CIS Version 10.4

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

Delinquent Notices, Cutoff Process

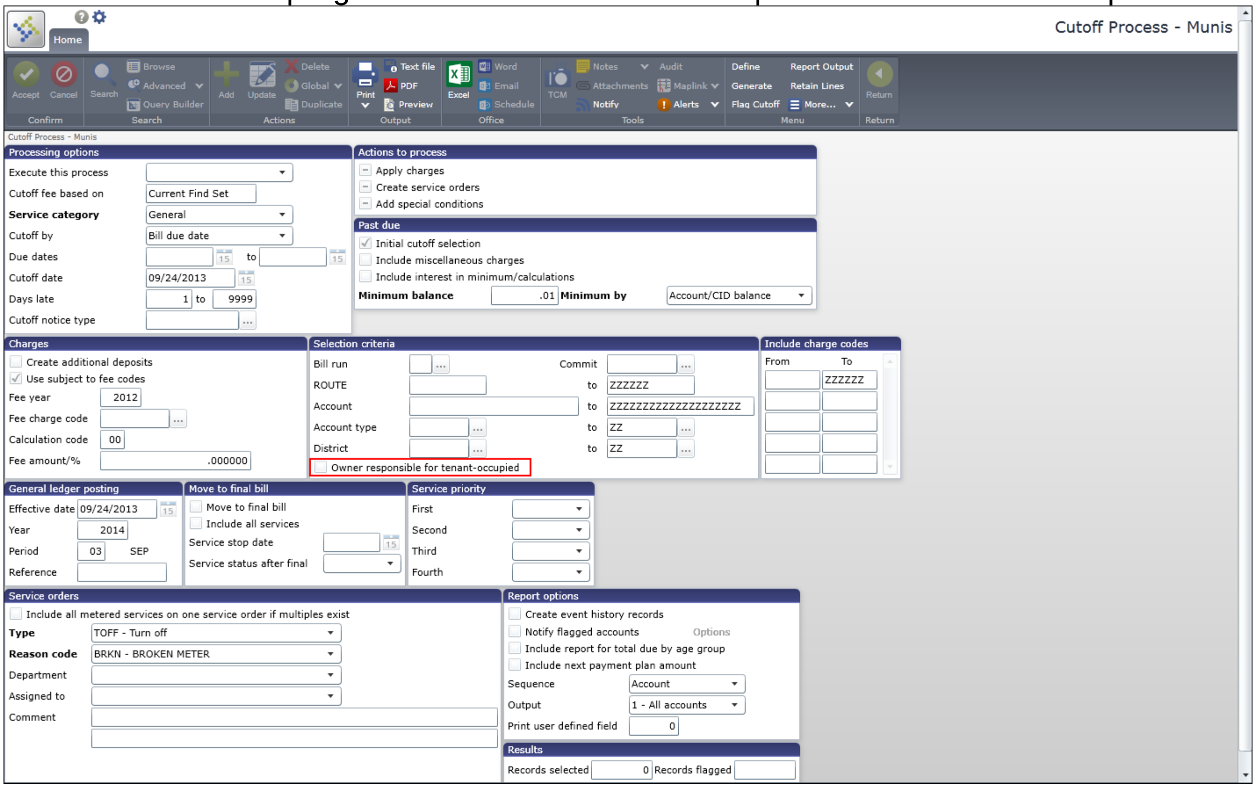
The Delinquent Notices and Cutoff Process programs provide the option for sending delinquent notices to the tenant's owner account. In the Delinquent Notices program, the Owner Responsible for Tenant-occupied check box is available.



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.



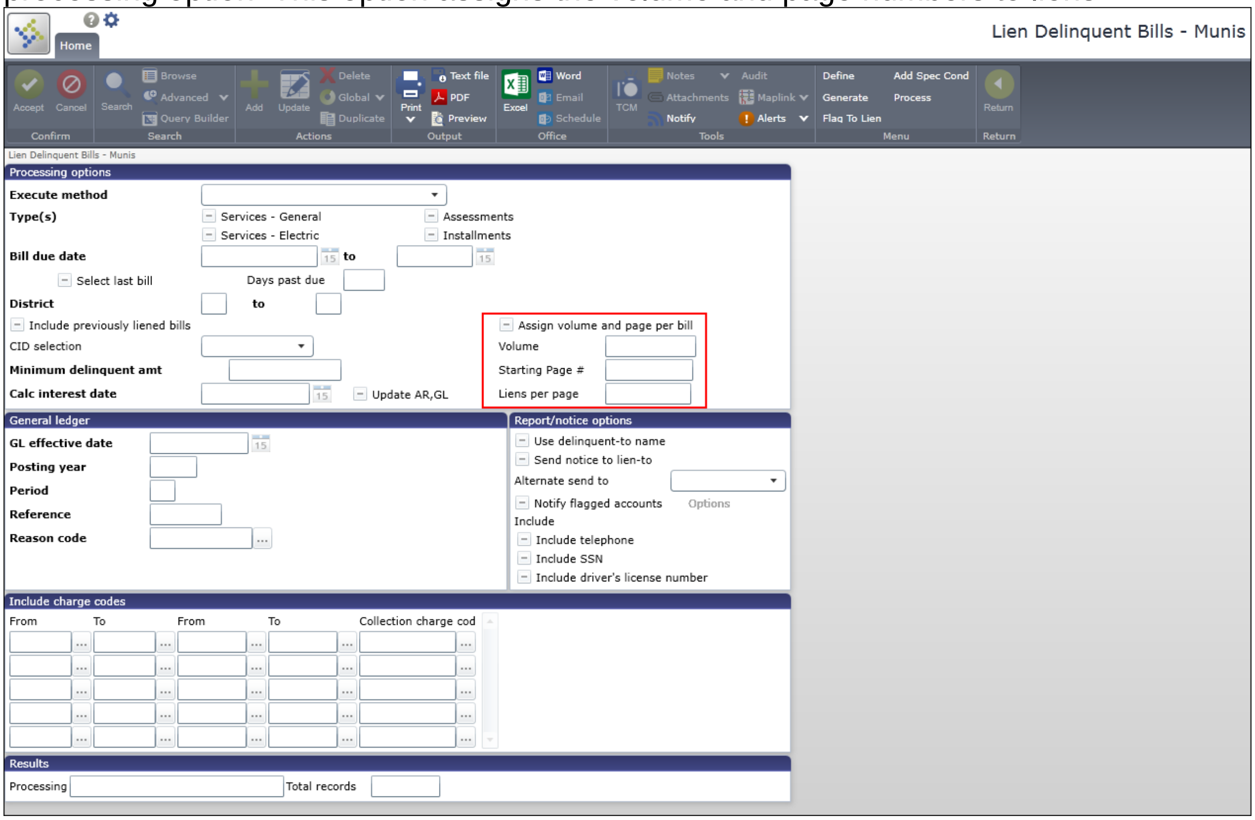
If selected, this check box restricts the Fee Charge Code value to calc code 60–Flat Amount and when the process completes, one of the following results:

- 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.

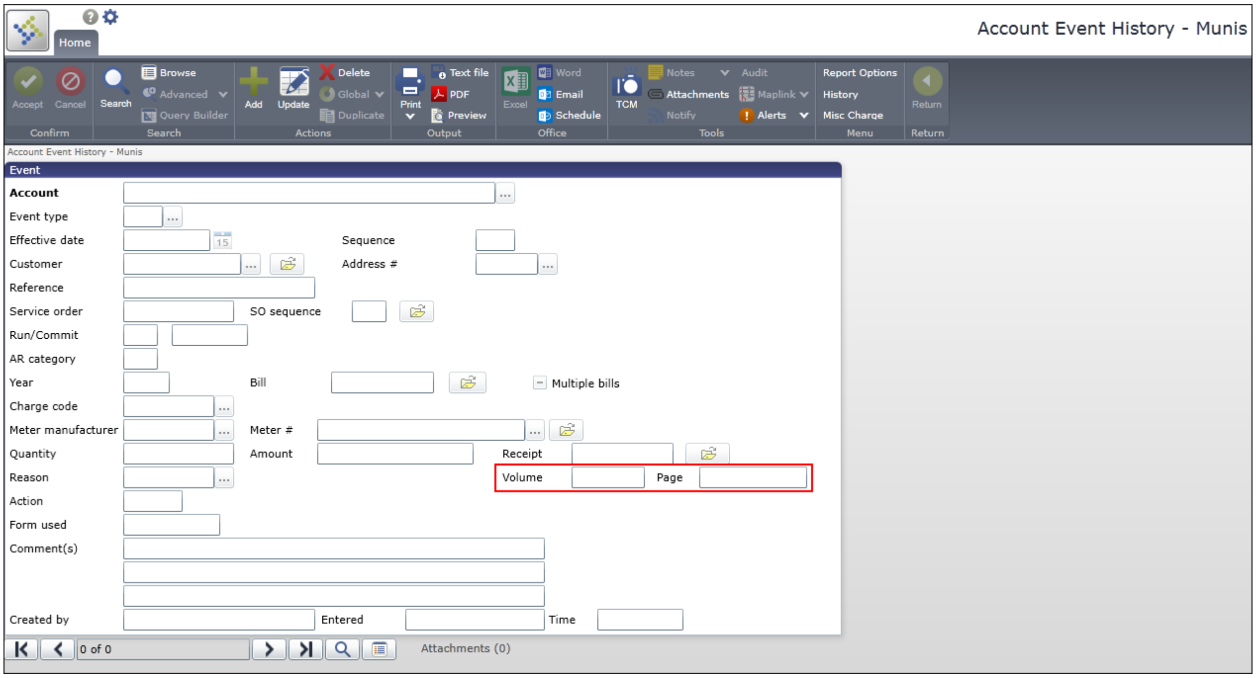
Lien Delinquent Bills

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.



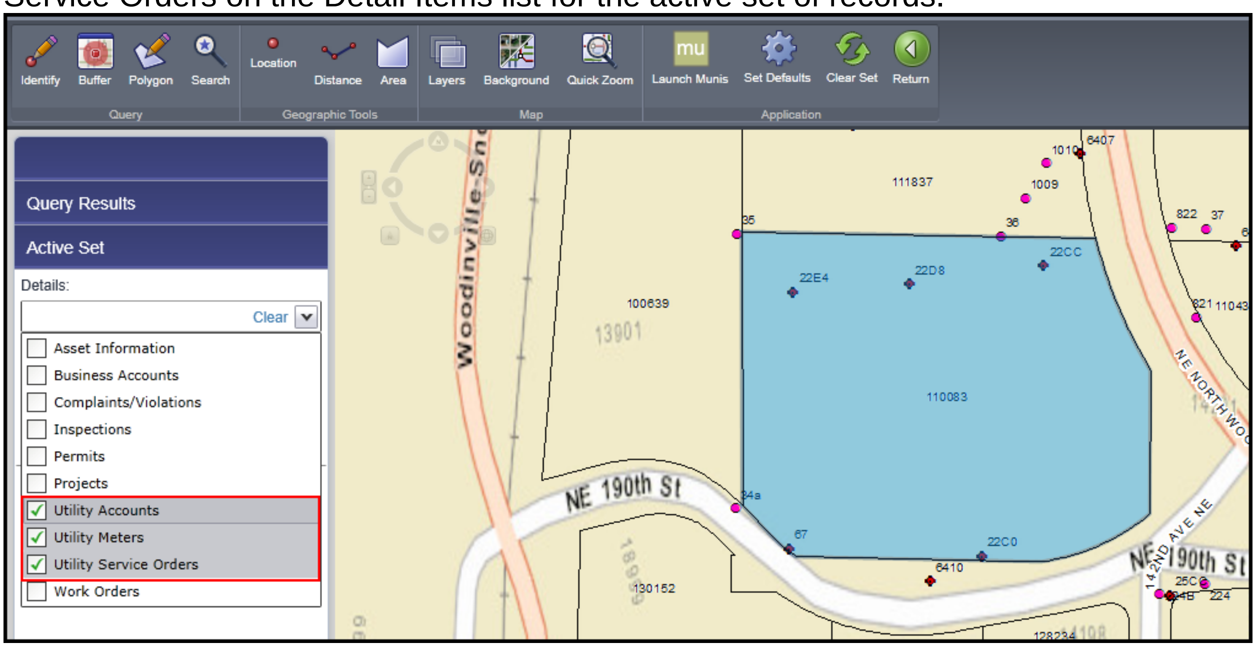
Using a single volume number, a starting page number, and a standard number of liens per page, the program assigns these values to all the liens processed. The Microsoft Word and Microsoft Excel output files include the volume and page values.

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.

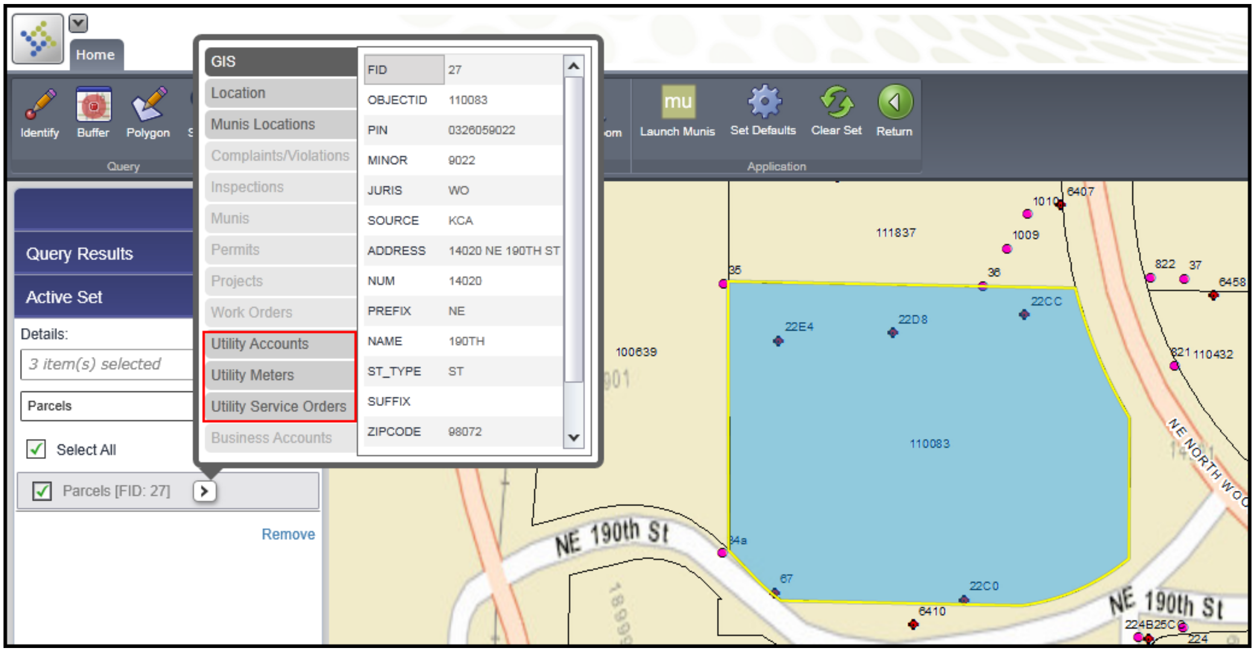


MapLink

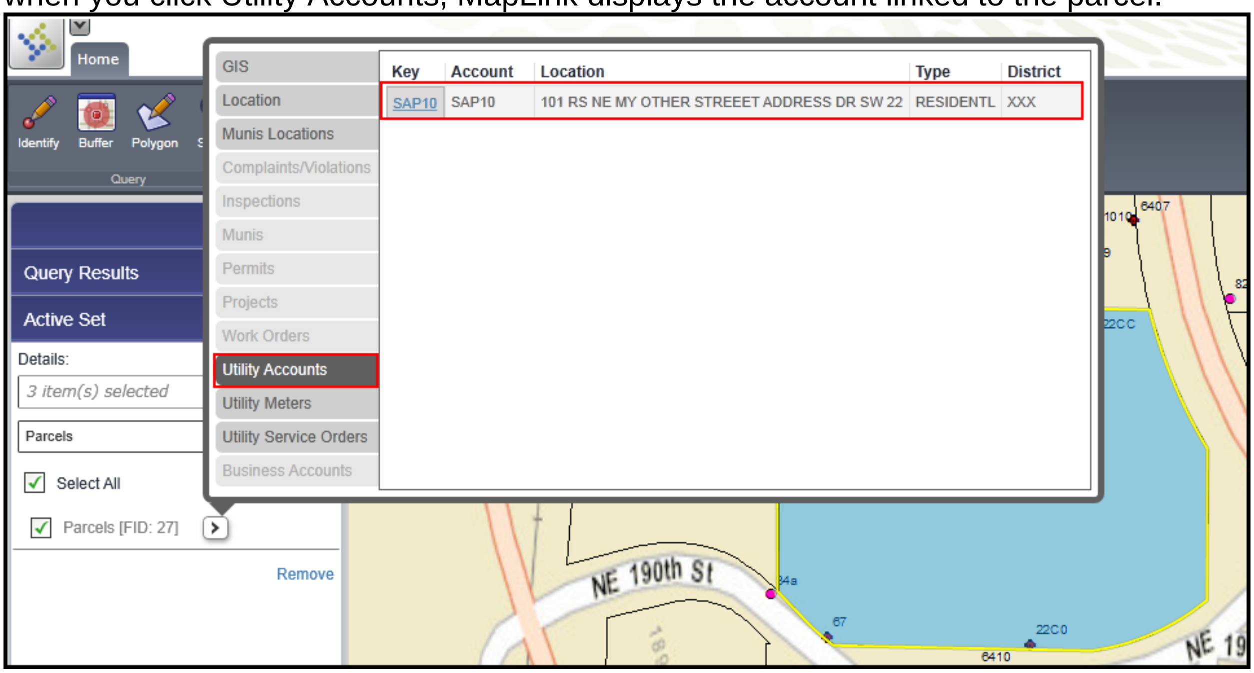
Munis MapLink for Utility Billing–CIS includes the Utility Accounts, Utility Meters, and Utility Service Orders on the Detail Items list for the active set of records.



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.

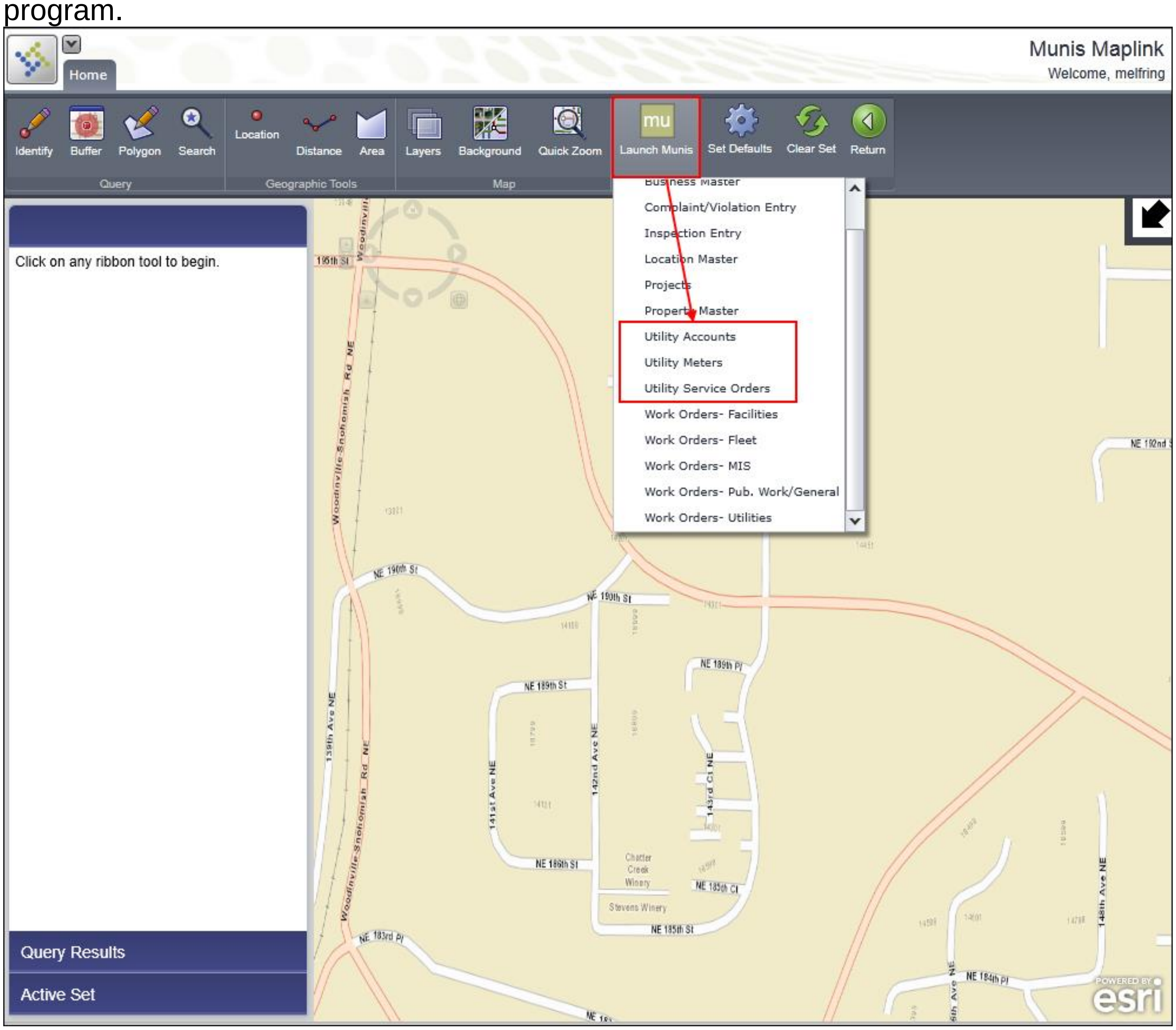


Clicking the Key hyperlink opens the Utilities program with the associated account as the active record.

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.

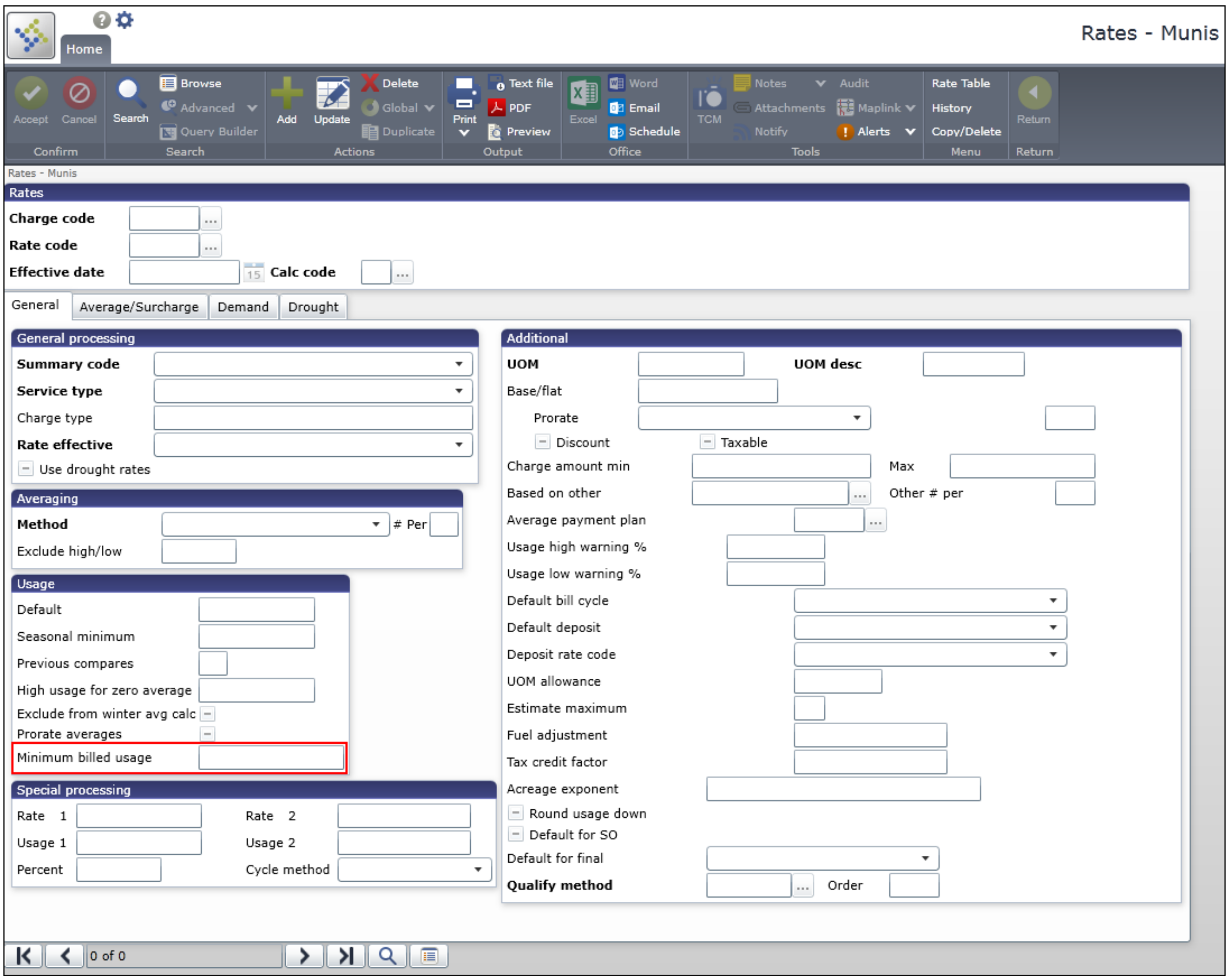
The Launch Munis ribbon option includes the Utility Accounts, Utility Meters, and Utility Service Orders options, which provide direct access to the selected programs in Munis. When the Munis program opens, the MapLink active set is also the selected active set for the Munis program.



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.



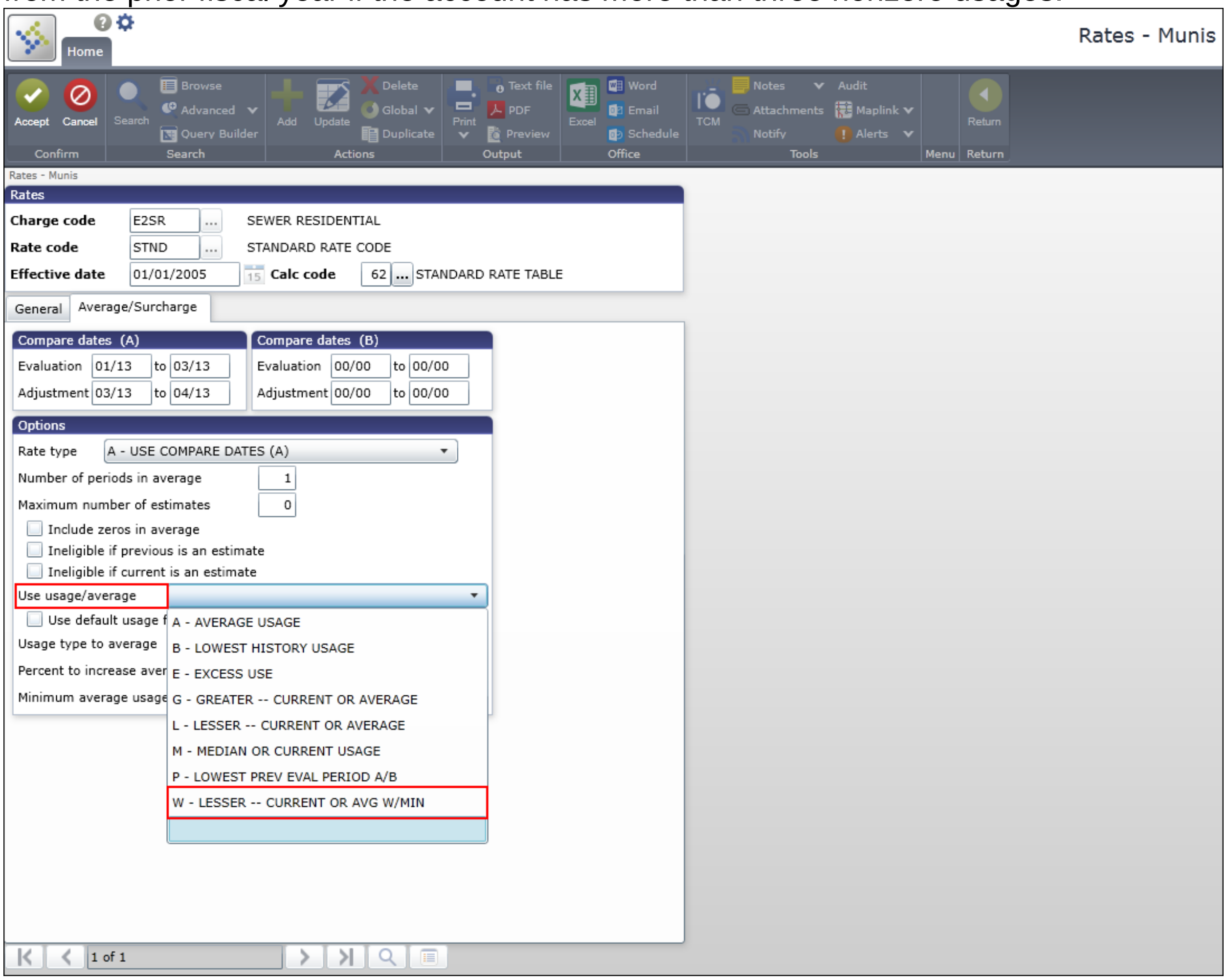
The Calculate Charges and Bill Adjustments programs are updated so that when billed usage is determined, the usage minimum from the Rate Masters program is evaluated against the actual usage and replaces the actual usage as the billed usage when it is less. The comparison of actual usage to a usage minimum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

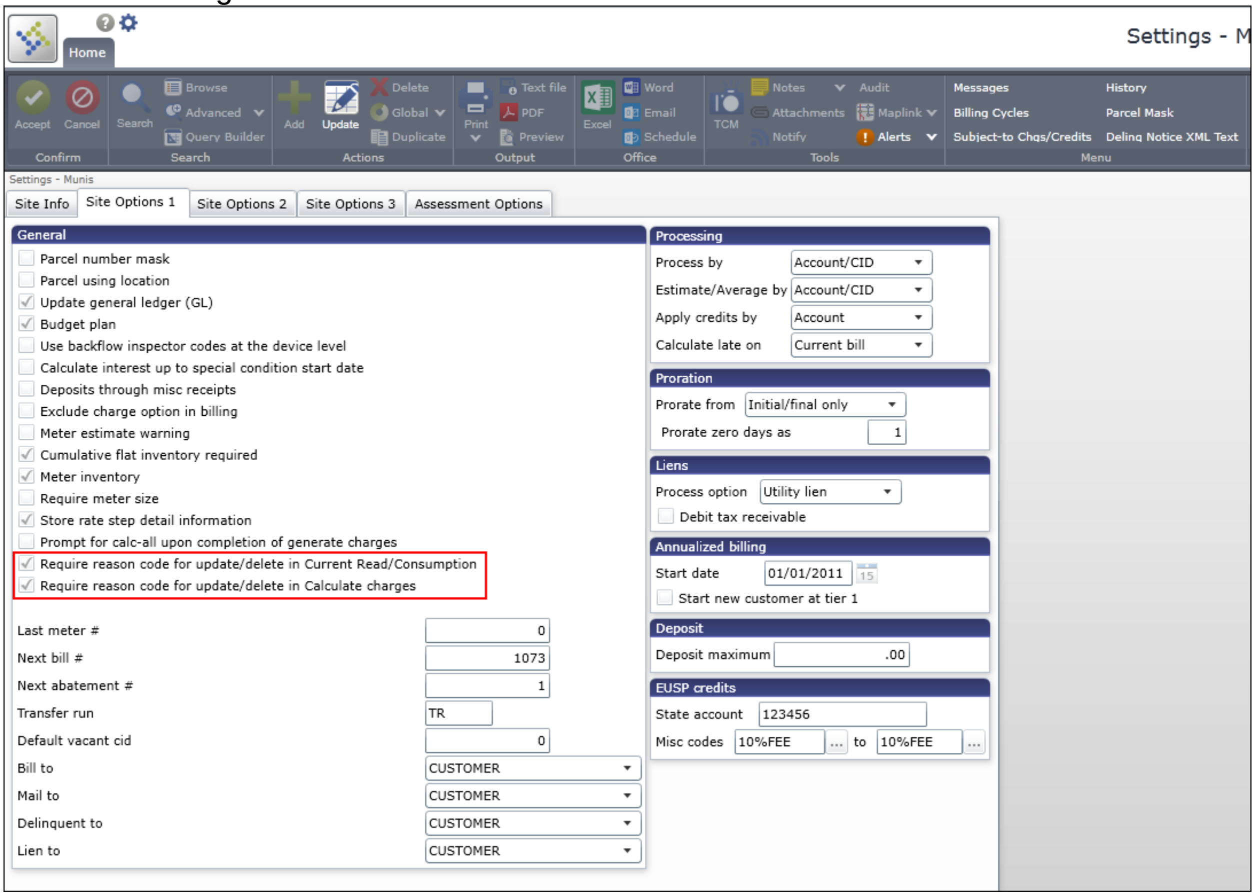
For winter quarter sewer calculations, the Rate Masters program includes the W-Lesser--Current or Avg w/Min field value option for the Use Usage/Average list on the Average/Surcharge tab. This calculation is based on the lesser of the current or average usage from the prior fiscal year if the account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

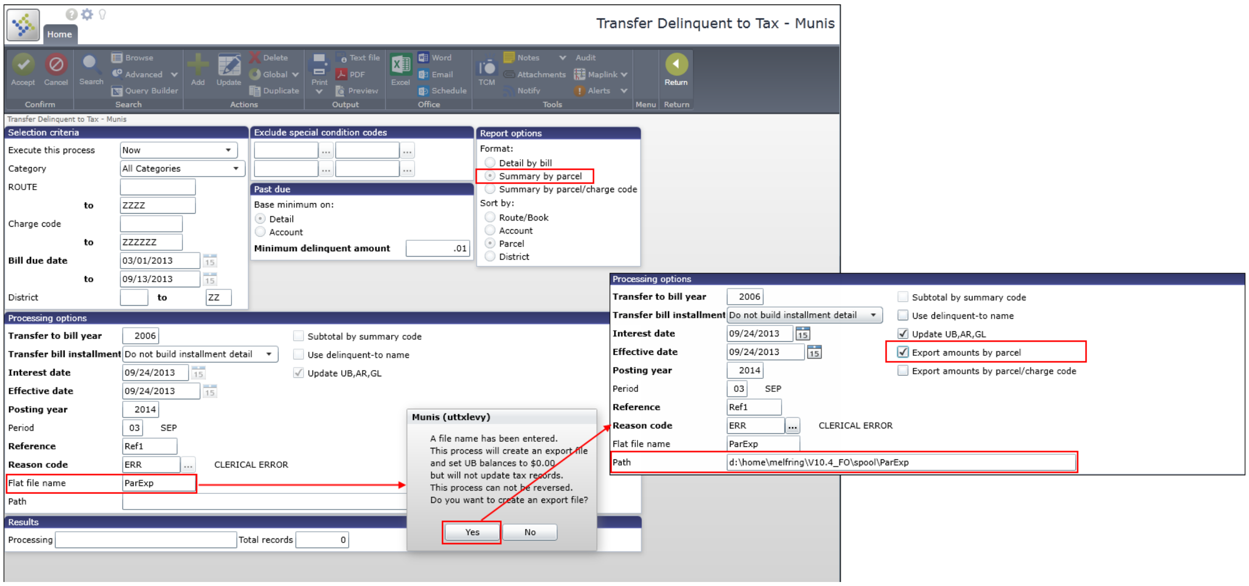
- Calculate Charges Reasons Codes for the code type CCR
- Current Read/Cons Reason Codes for the code type CRC

Transfer Delinquent to Tax

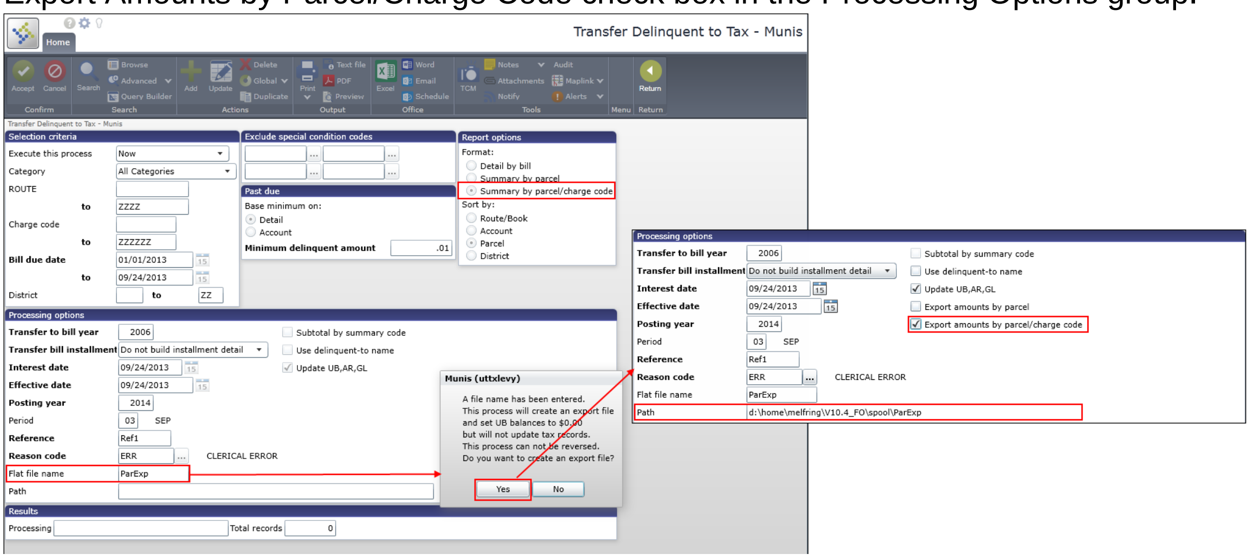
The Transfer Delinquent to Tax program provides an option to create an export file that groups amounts by parcel or parcel/charge code if you enter a value in the Flat File Name box.

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.

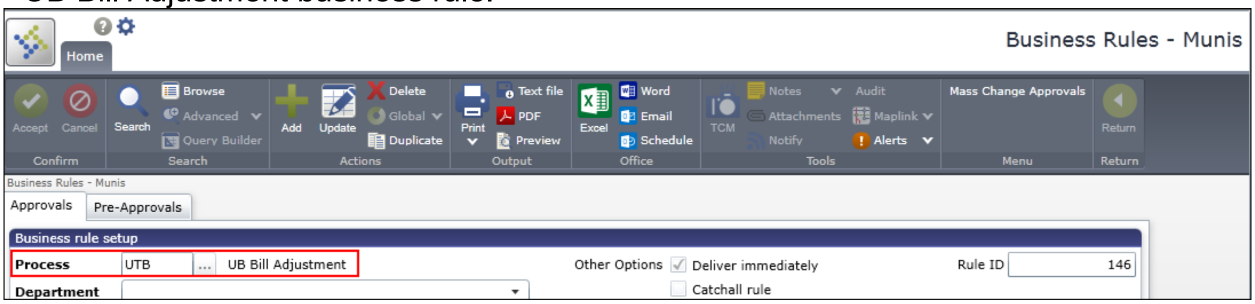


To create a summary report by parcel and charge code, in Report Options, select Summary by Parcel/Charge Code and then follow the same procedure as for the Parcel report, selecting the Export Amounts by Parcel/Charge Code check box in the Processing Options group.



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.

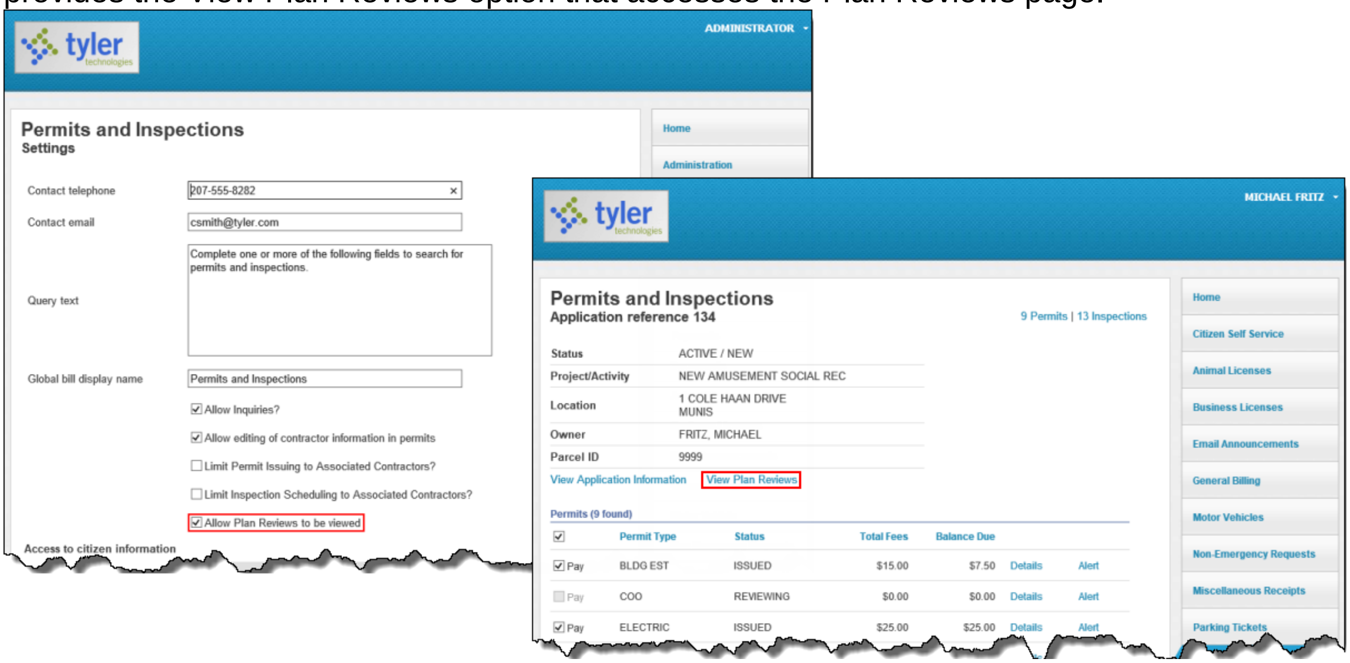
Citizen Self Service Version 10.4

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.

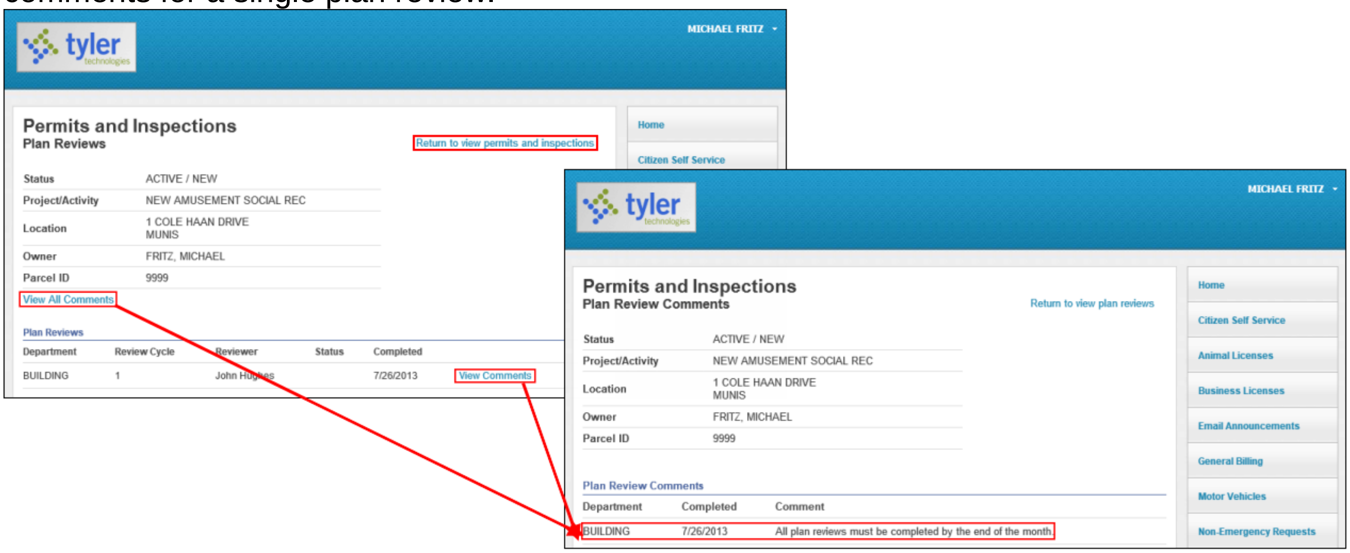
Permits and Inspections

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.

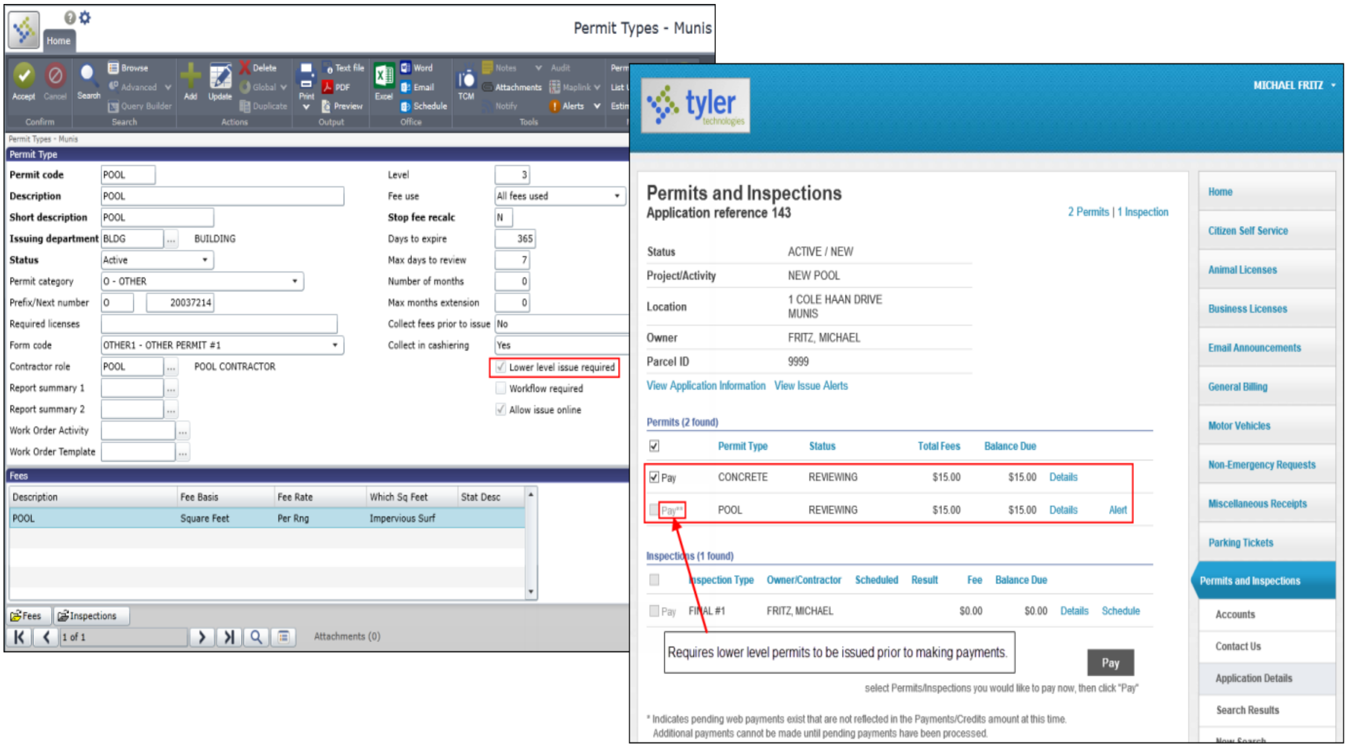


On the Plan Reviews page, the Return to View Permits and Inspections option returns you to the previous page. The View All Comments option displays the Plan Reviews Comments page where detailed plan review information is available. The View Comments option displays comments for a single plan review.



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.

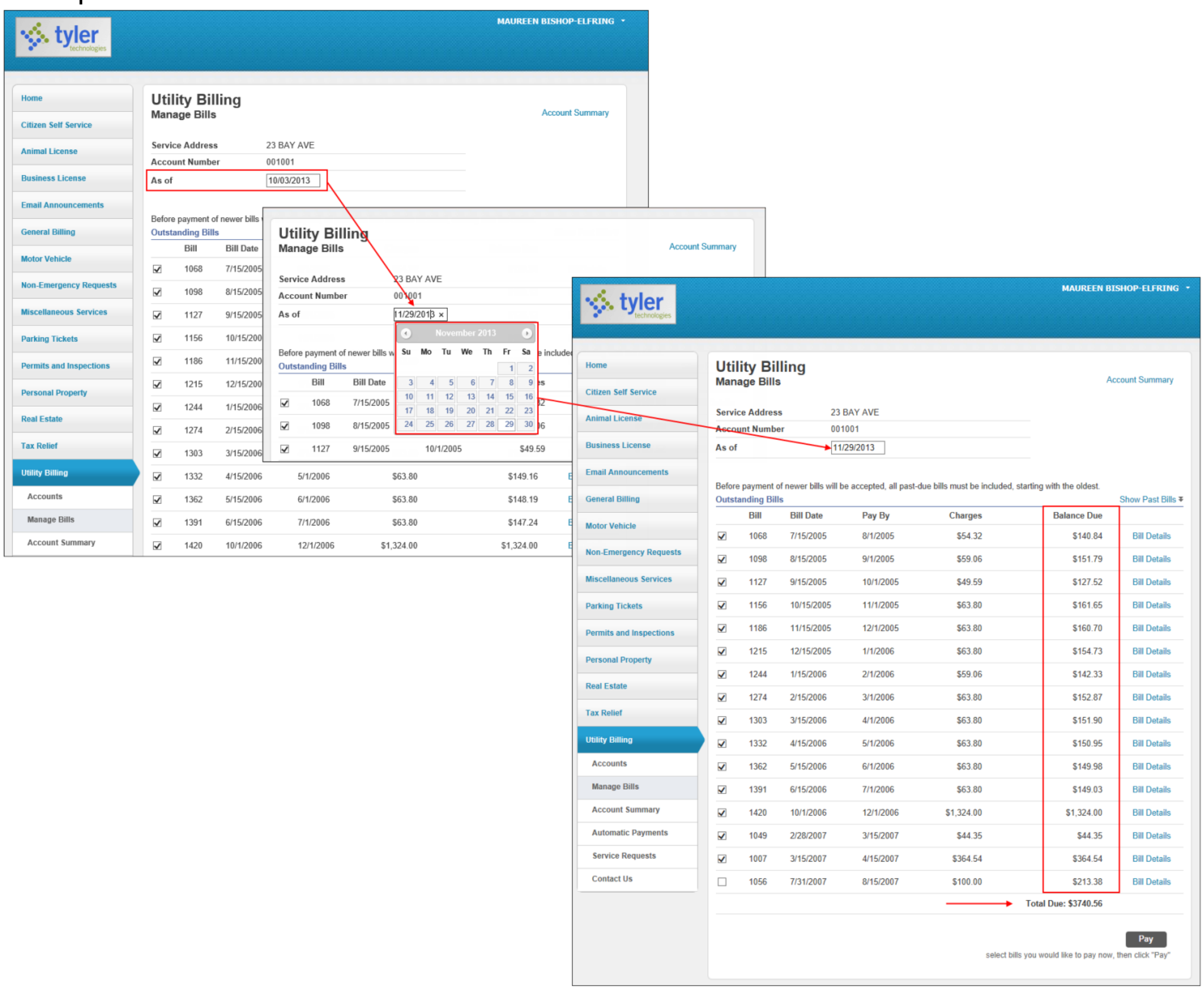

Permit Types - Munis
Permit Type
Permit code POOL
Description POOL
Short description POOL
Issuing department BLDG BUILDING
Status Active
Permit category O - OTHER
Prefix/Next number O 20037214
Required licenses
Form code OTHER1 - OTHER PERMIT #1
Contractor role POOL POOL CONTRACTOR
Report summary 1
Report summary 2
Work Order Activity
Work Order Template
Level 3
Fee use All fees used
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 Rng Impervious Surf
Fees Inspections
1 of 1
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 MUNIS
Owner FRITZ, MICHAEL
Parcel ID 9999
View Application Information View Issue Alerts
Permits (2 found)
Permit Type Status Total Fees Balance Due
Pay CONCRETE REVIEWING $15.00 $15.00 Details
Pay** POOL REVIEWING $15.00 $15.00 Details Alert
Inspections (1 found)
Inspection Type Owner/Contractor Scheduled Result Fee Balance Due
Pay FINAL #1 FRITZ, MICHAEL $0.00 $0.00 Details Schedule
Requires lower level permits to be issued prior to making payments.
Pay
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

Utility Billing

As Of Dates

On the Manage Bills or Bills Details pages in CSS-Utility Billing, the As Of date box recalculates the amount due for outstanding charges according to the interest rate applied.

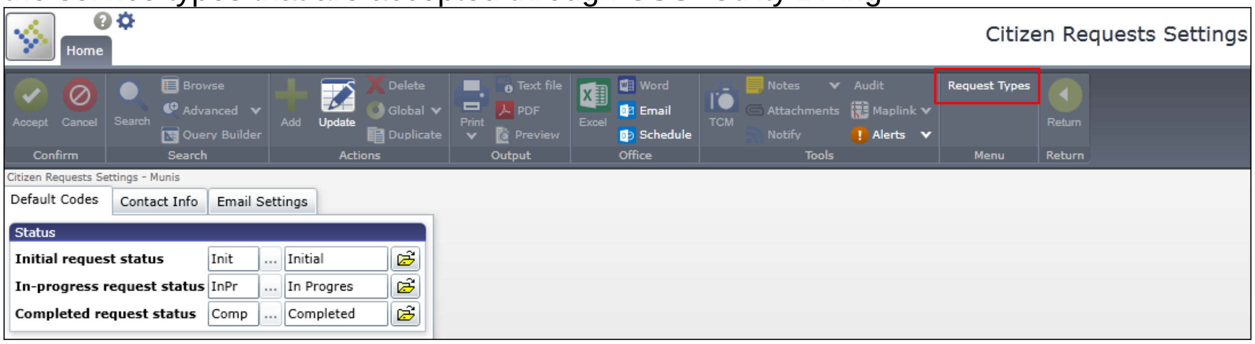
When you position your cursor in the As Of date box, the program displays a calendar. Navigate to the accrual date for which to see the changes in interest and penalties. When you click the new date, the program recalculates the Balance Due amounts for the individual bills and updates the Total Due amount.



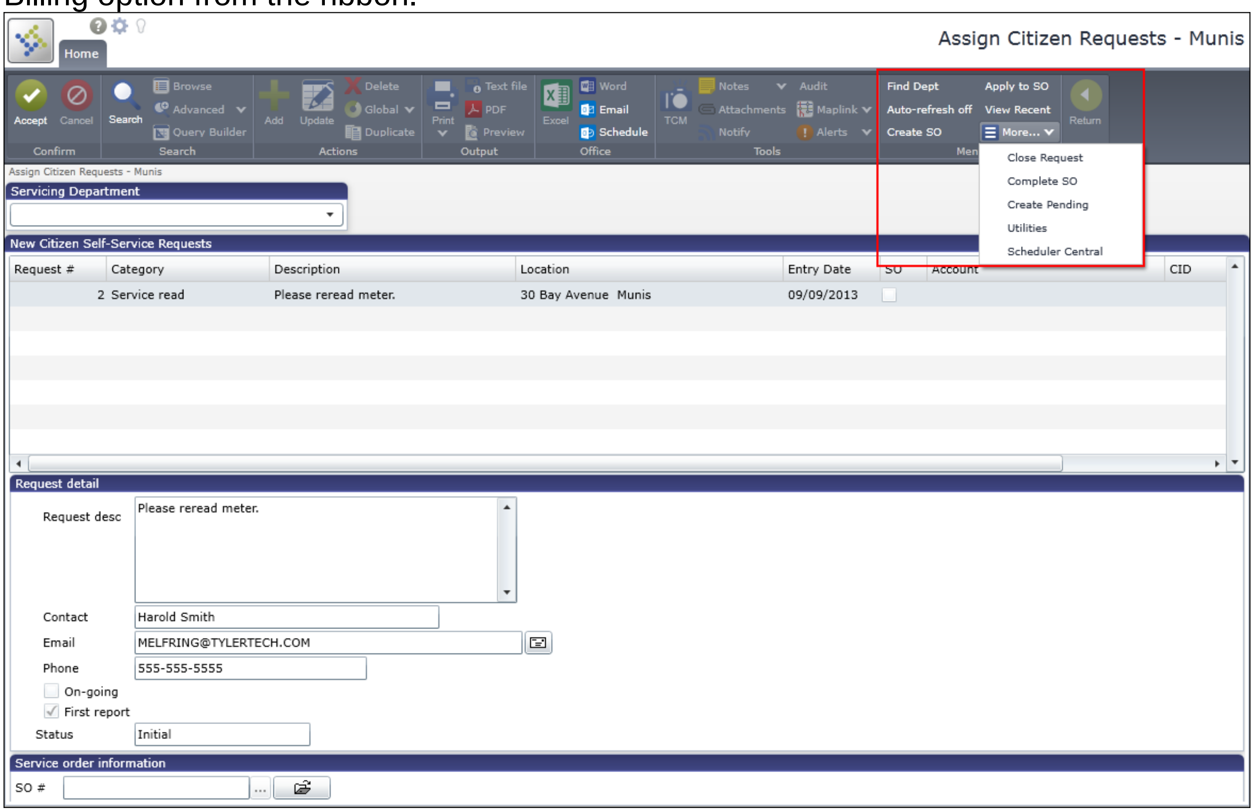
Using the As Of box to refresh bill amounts according to specified dates allows you to see how much interest, penalties, and so on, would accrue if you postpone paying the bill. There are no permanent changes as a result of using this recalculation feature.

Service Requests

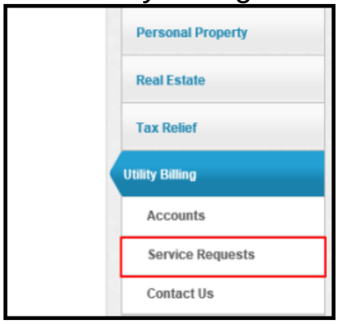
CSS – Utility Billing, in conjunction with the Munis Citizen Request Settings and Assign Citizen Requests programs, accepts and processes nonemergency service requests for utility billing accounts. Using Citizen Request Settings from the Munis Utility Billing menu, you can define the service types that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

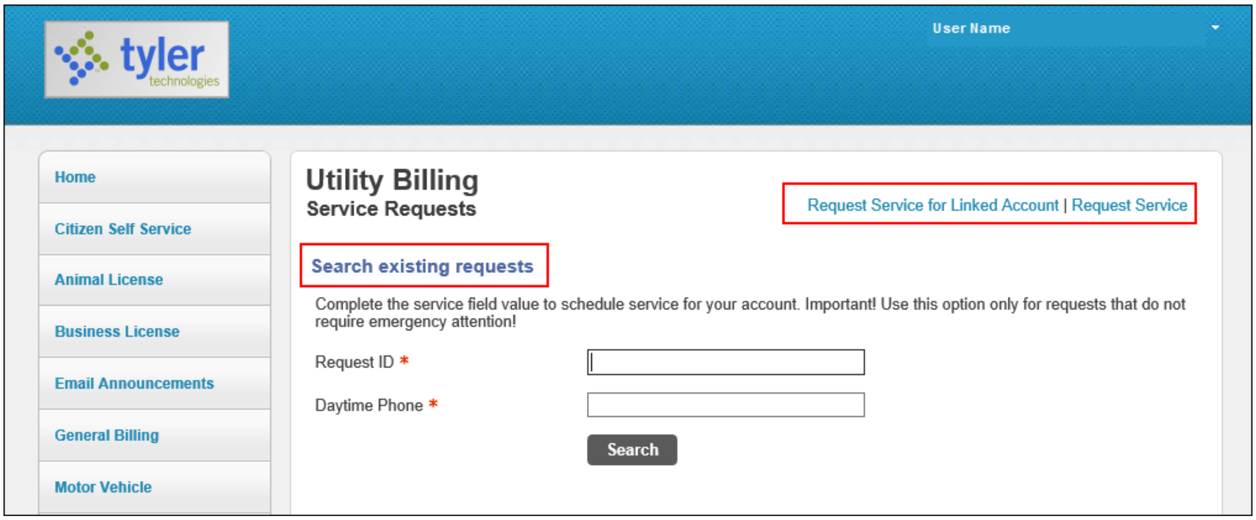


Once the service request set up is complete in CSS Administration, the Utility Billing menu in CSS-Utility Billing includes the Service Requests item.

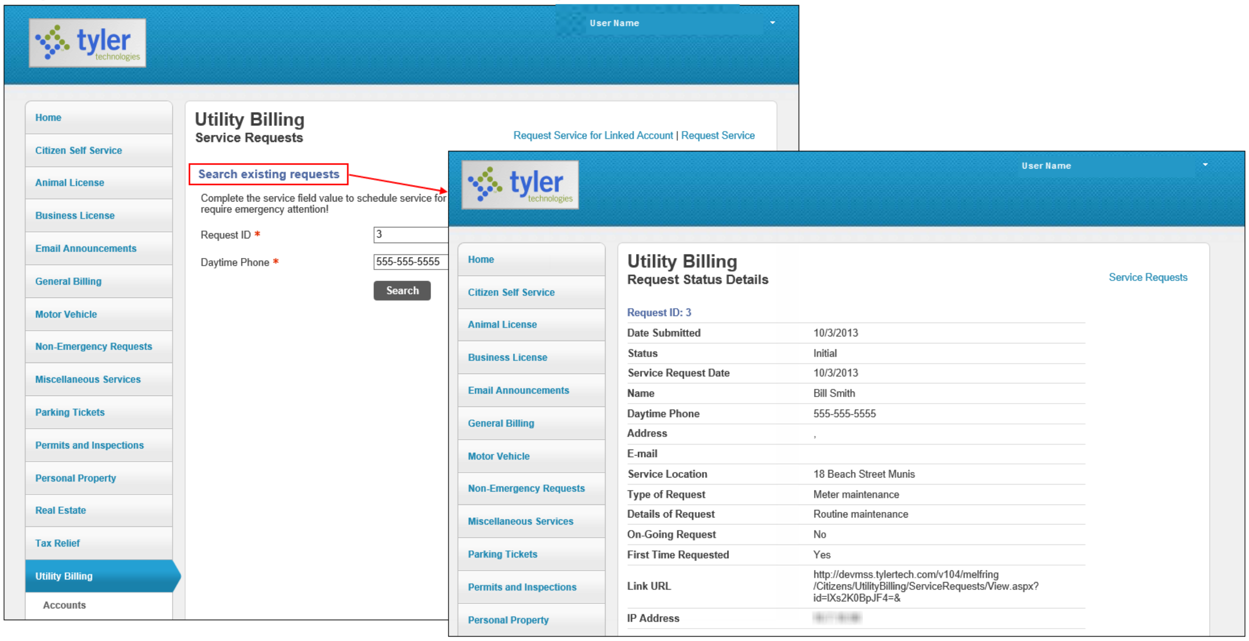


The main Service Requests page provides three options:

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

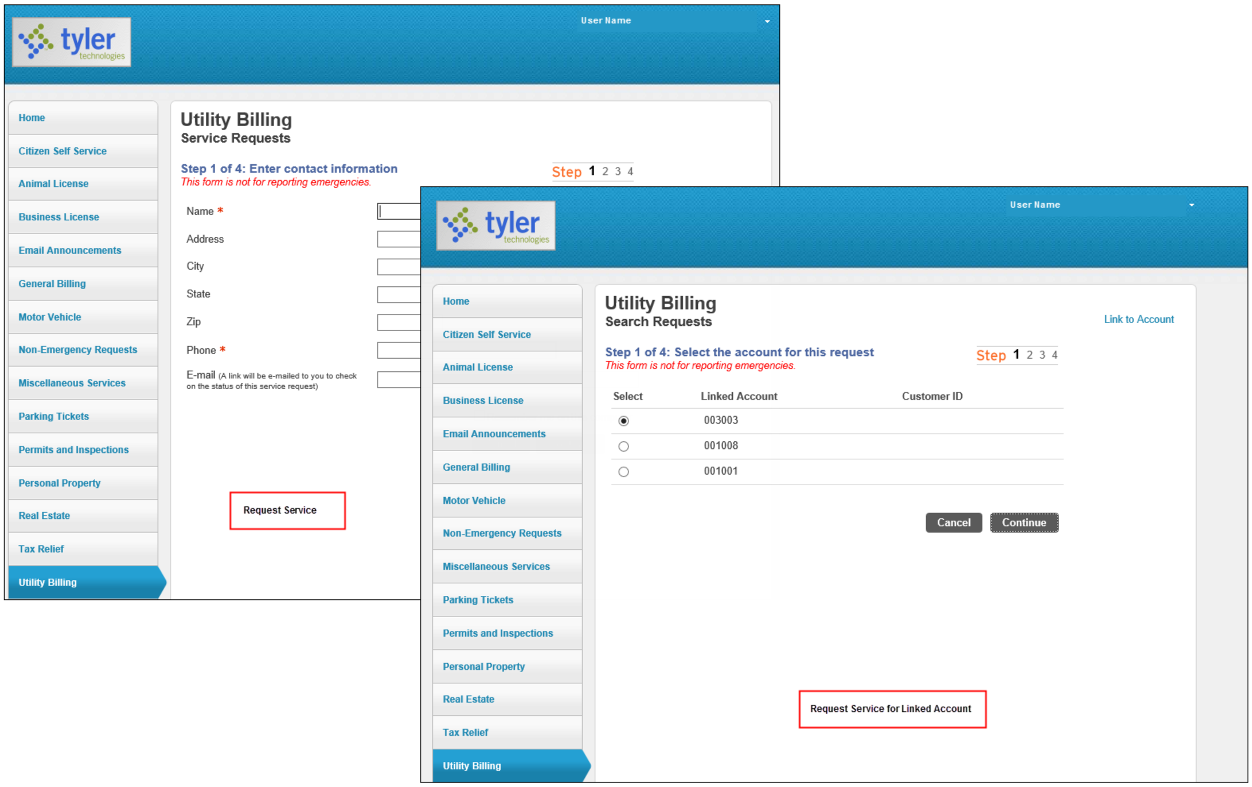


The Search Existing Requests option provides searching for existing service requests by the request ID number and requestor’s telephone number.

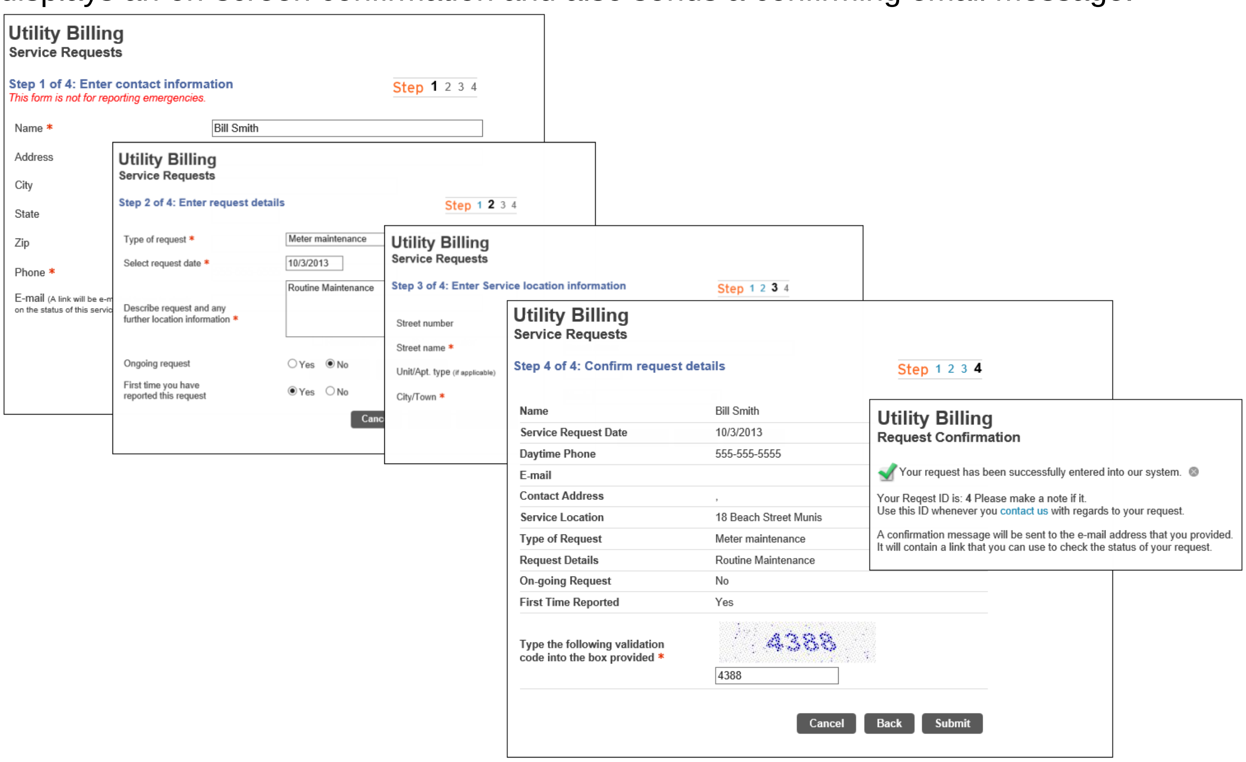


Selecting Request Service displays a Step 1 page that provides the Name, Address, Phone, and Email fields. Only the Name and Phone values are required, but to receive an email confirmation for the request, you must complete the Email box.

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.

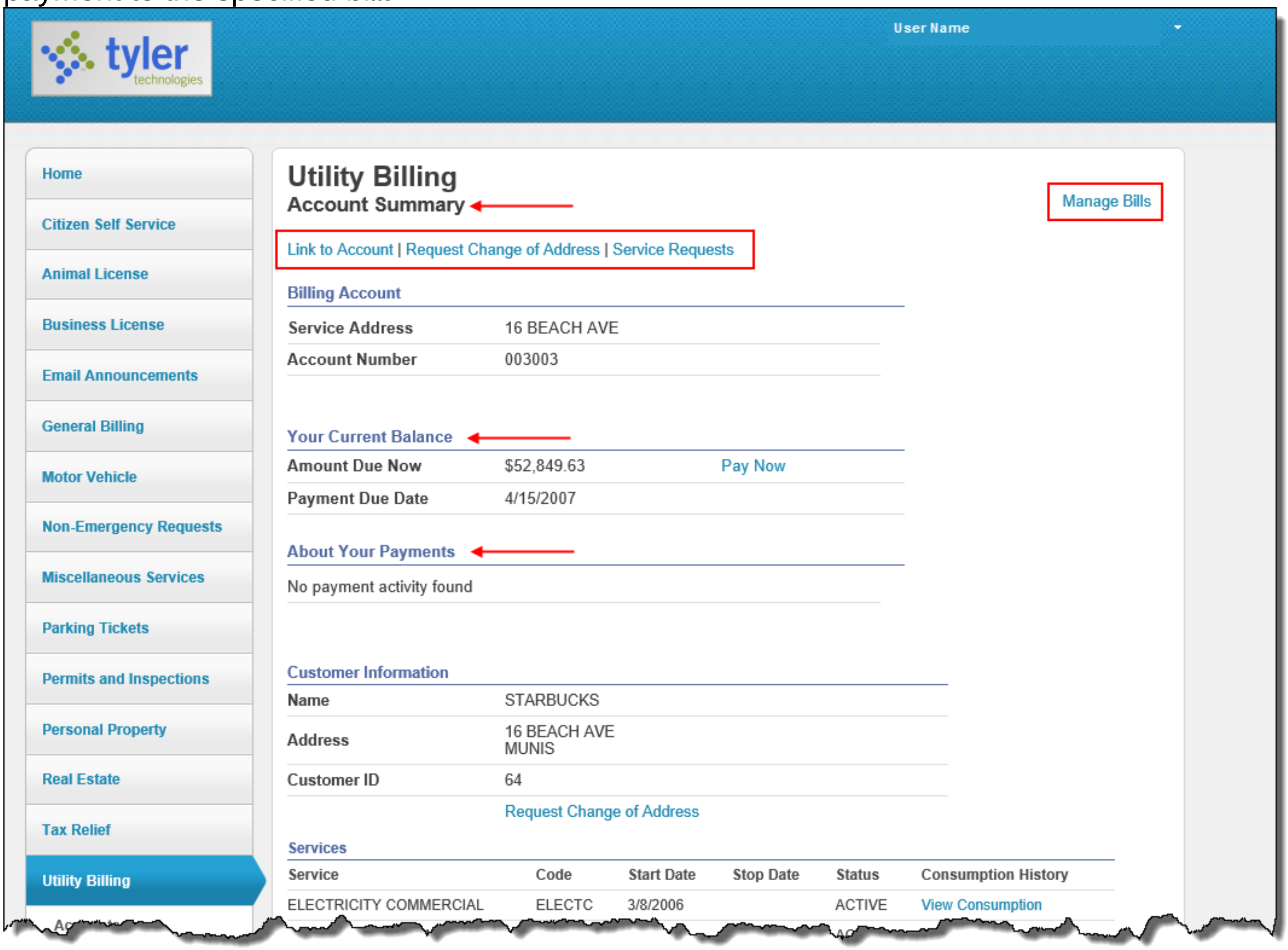


The process for completing a service request includes four steps, after which the program displays an on-screen confirmation and also sends a confirming email message.



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.

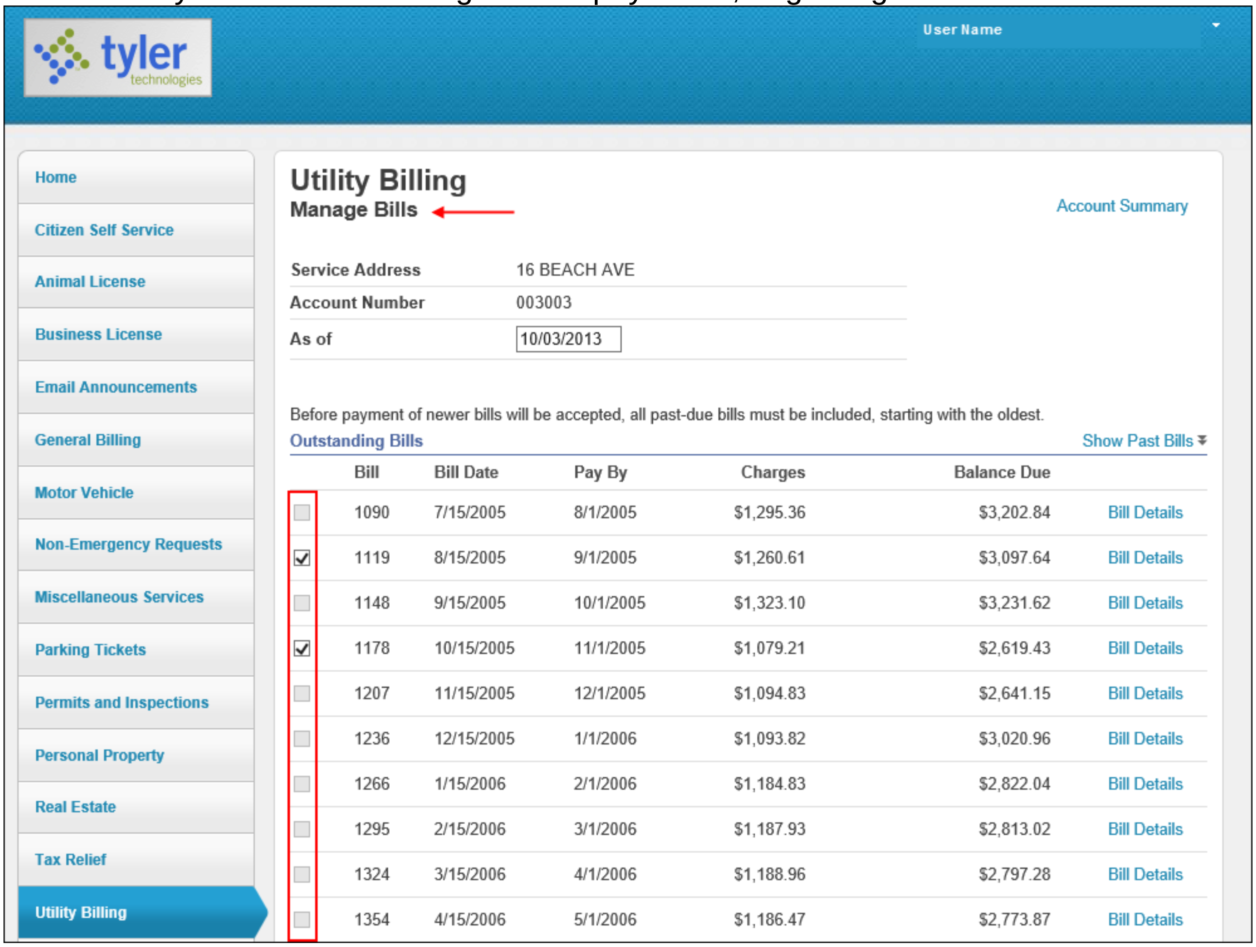


The About Your Payments group displays the last posted payment, provided this amount is greater than zero. A maximum of five payment activity records are available and each row has a Details link that displays the Payments and Adjustment page for the bill.

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.

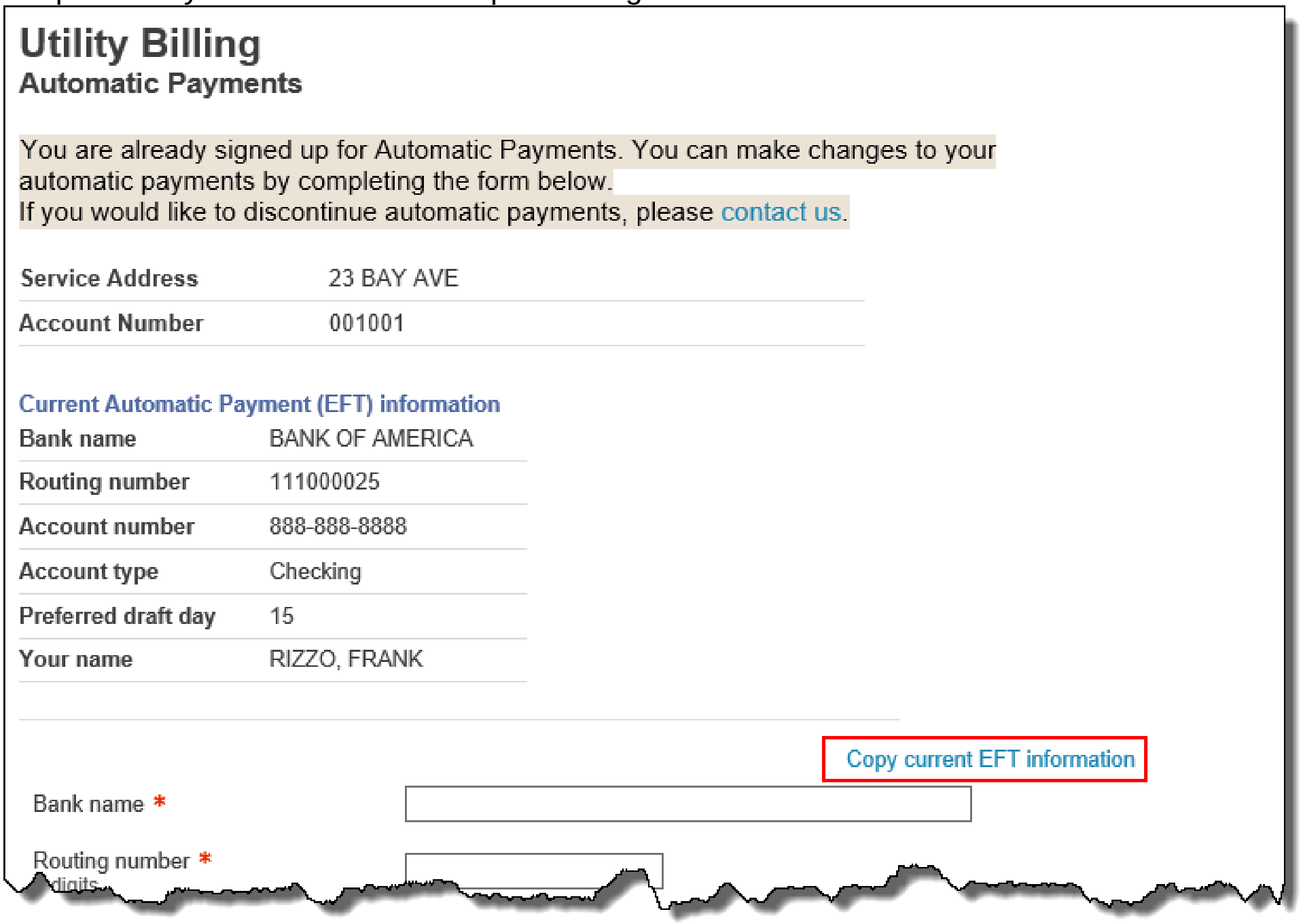
Manage Bills

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.



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 ode. 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

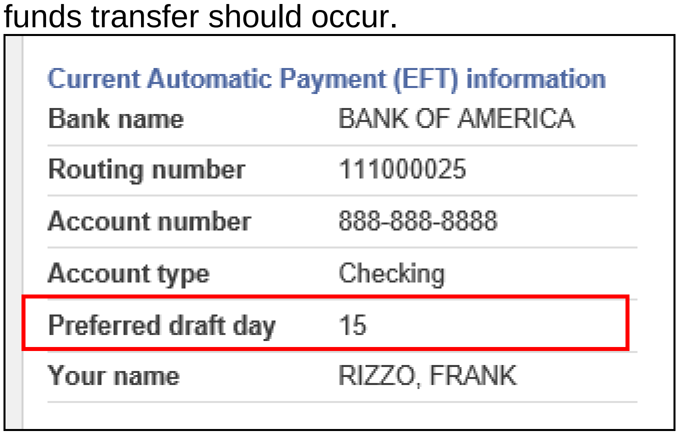
Bank name	BANK OF AMERICA
Routing number	111000025
Account number	888-888-8888
Account type	Checking
Preferred draft day	15
Your name	RIZZO, FRANK

Copy current EFT information

Bank name *

Routing number *
digits

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 Revenues10.5

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:

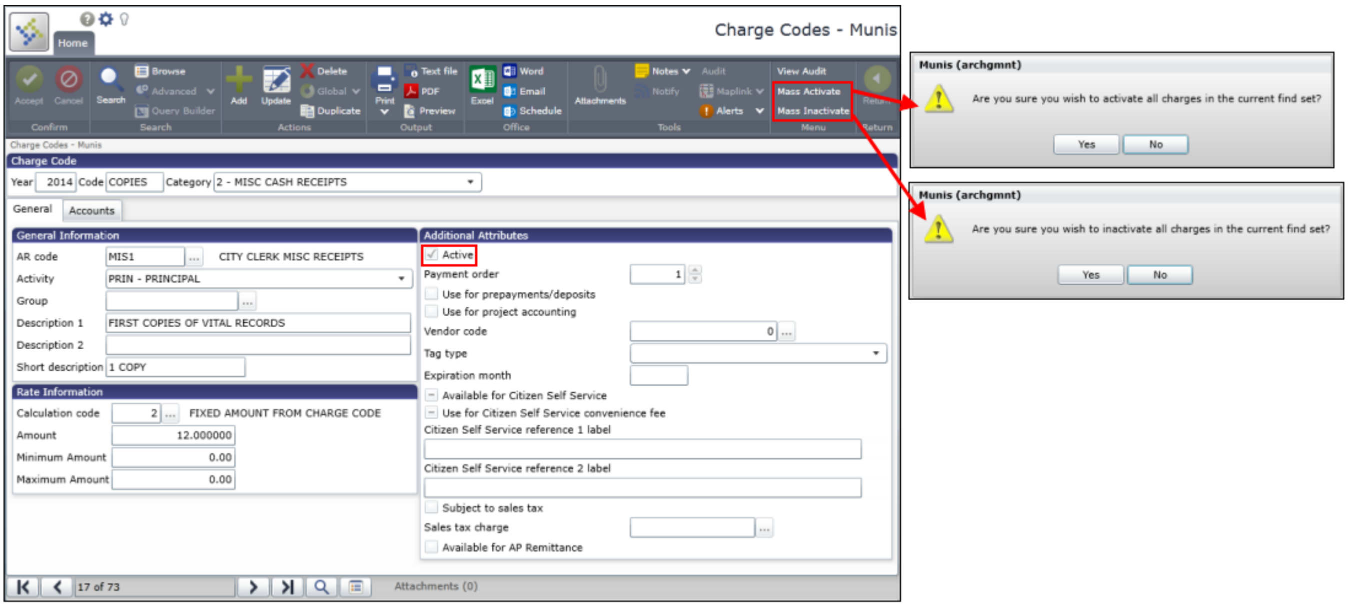
- General Revenues includes Accounts Receivable, Animal Licenses, General Billing, Maine Vehicle Registration, Parking Tickets, Slip Reservations, Vehicle Stickers, and Virginia State Income Tax.
- Property Revenues includes Accounts Receivable, Business Licenses, Central Property, Permits and Code Enforcements, 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

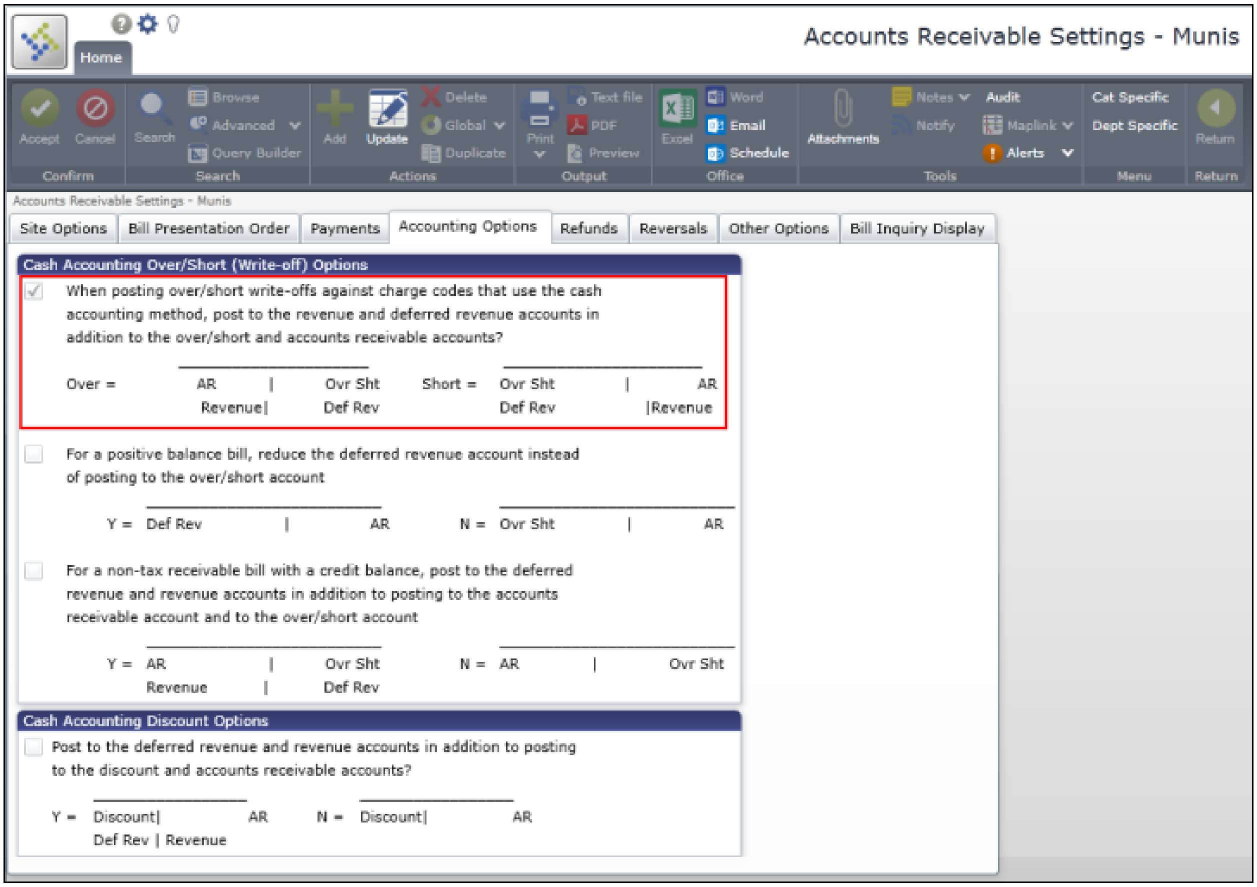
The Mass Activate and Mass Inactivate buttons activate or inactivate all charge codes in the current active set. Once you click Mass Activate or Mass Inactivate, the program displays a confirmation message for you to activate or inactivate the group of charge codes.



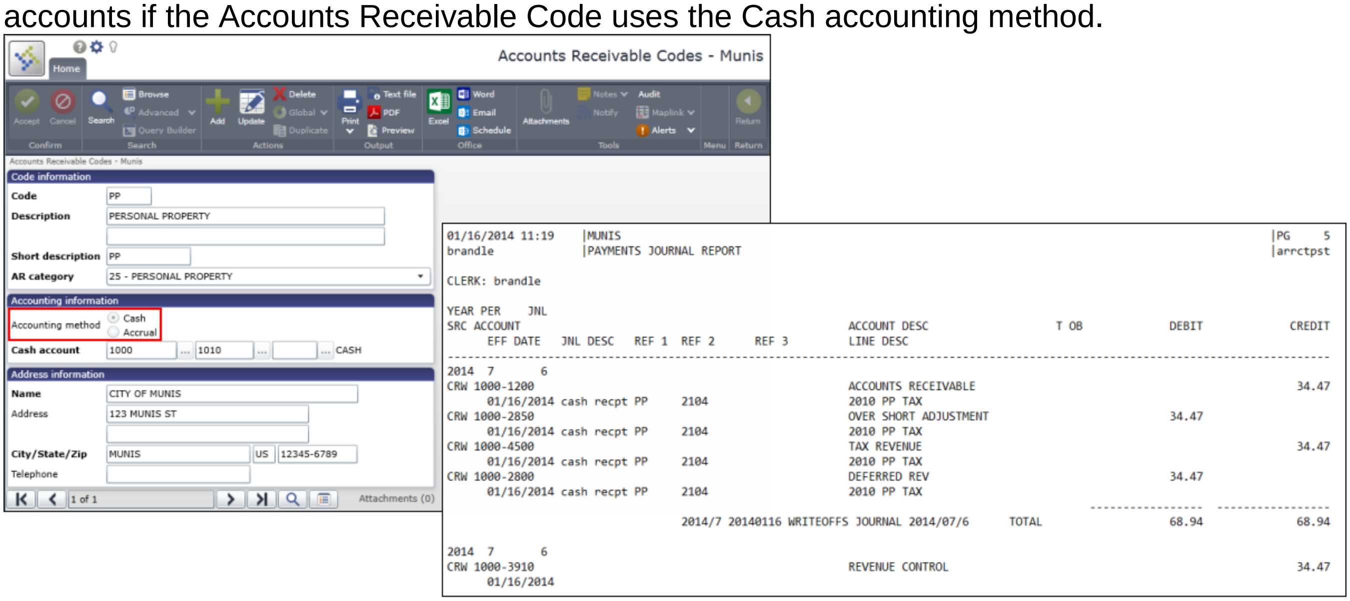
The Microsoft® Excel export includes the following General Ledger accounts: Abatement, Accounts Receivable, Cash, Deferred Revenue, Deposit, Discount, Exemption, Interest Revenue, Liability, Over Short, and Revenues lines 1 to 5.

Accounts Receivable Settings

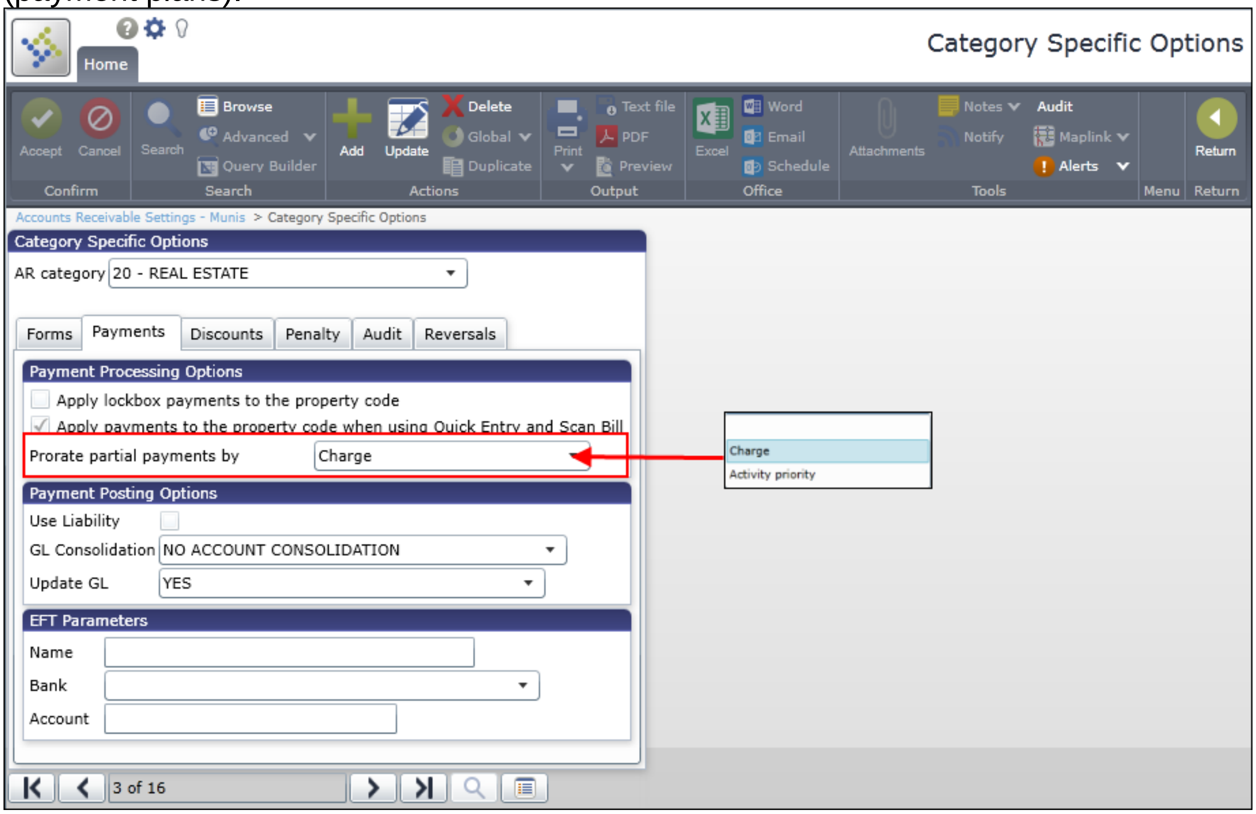
The When Posting Over/Short Write-Offs Against Charge Codes that Use the Cash Accounting Method, Post to the Revenue and Deferred Revenue Accounts in Addition to the Over/Short and Accounts Receivable Accounts check box is available.



When the check box is selected and you post the Over/Short Adjustment batch, the Revenue and Deferred Revenue accounts are included with the Over/Short and Accounts Receivable accounts if the Accounts Receivable Code uses the Cash accounting method.



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).



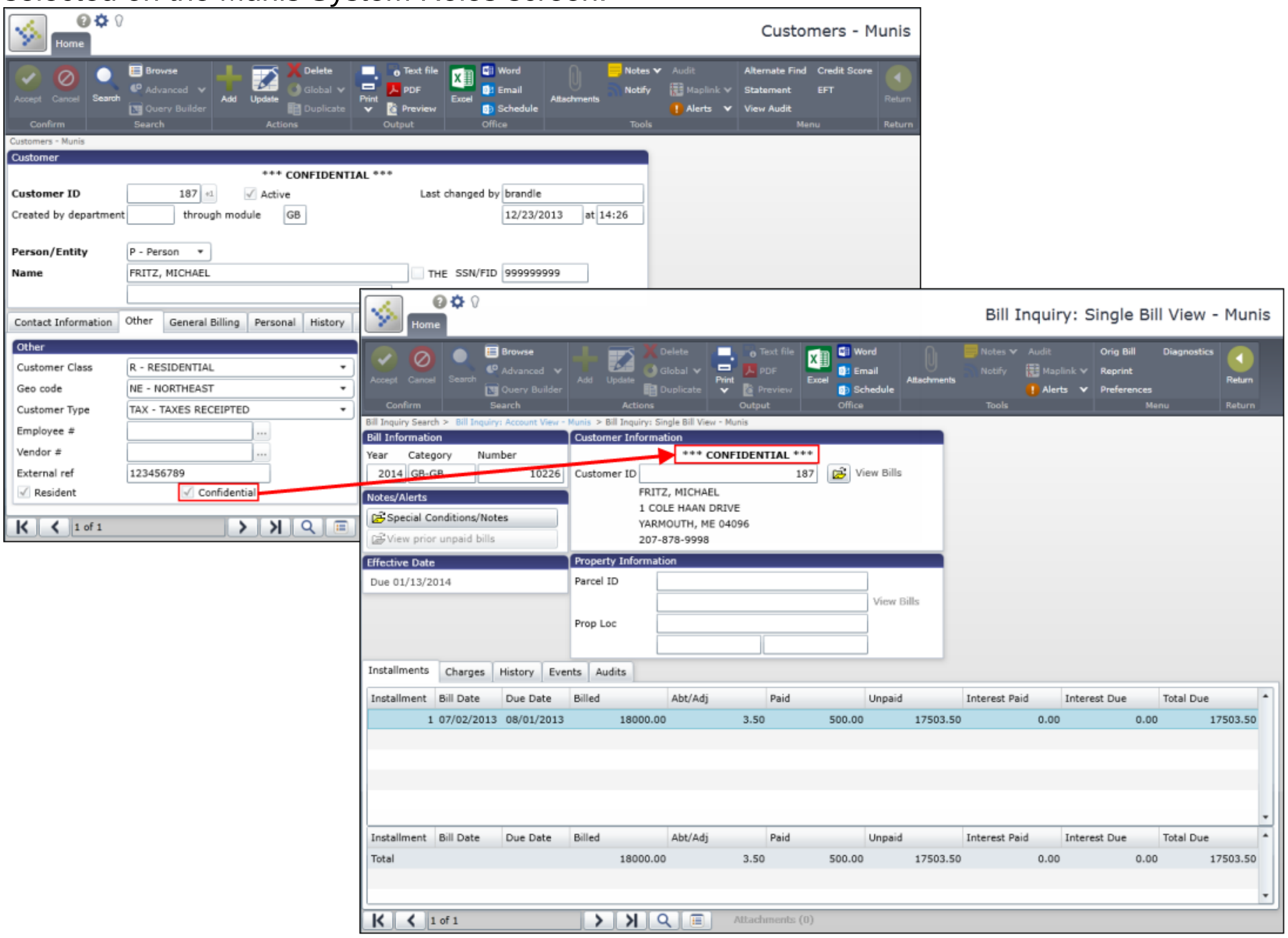
The list includes Charge or Activity Priority options that provide the following results:

- 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.

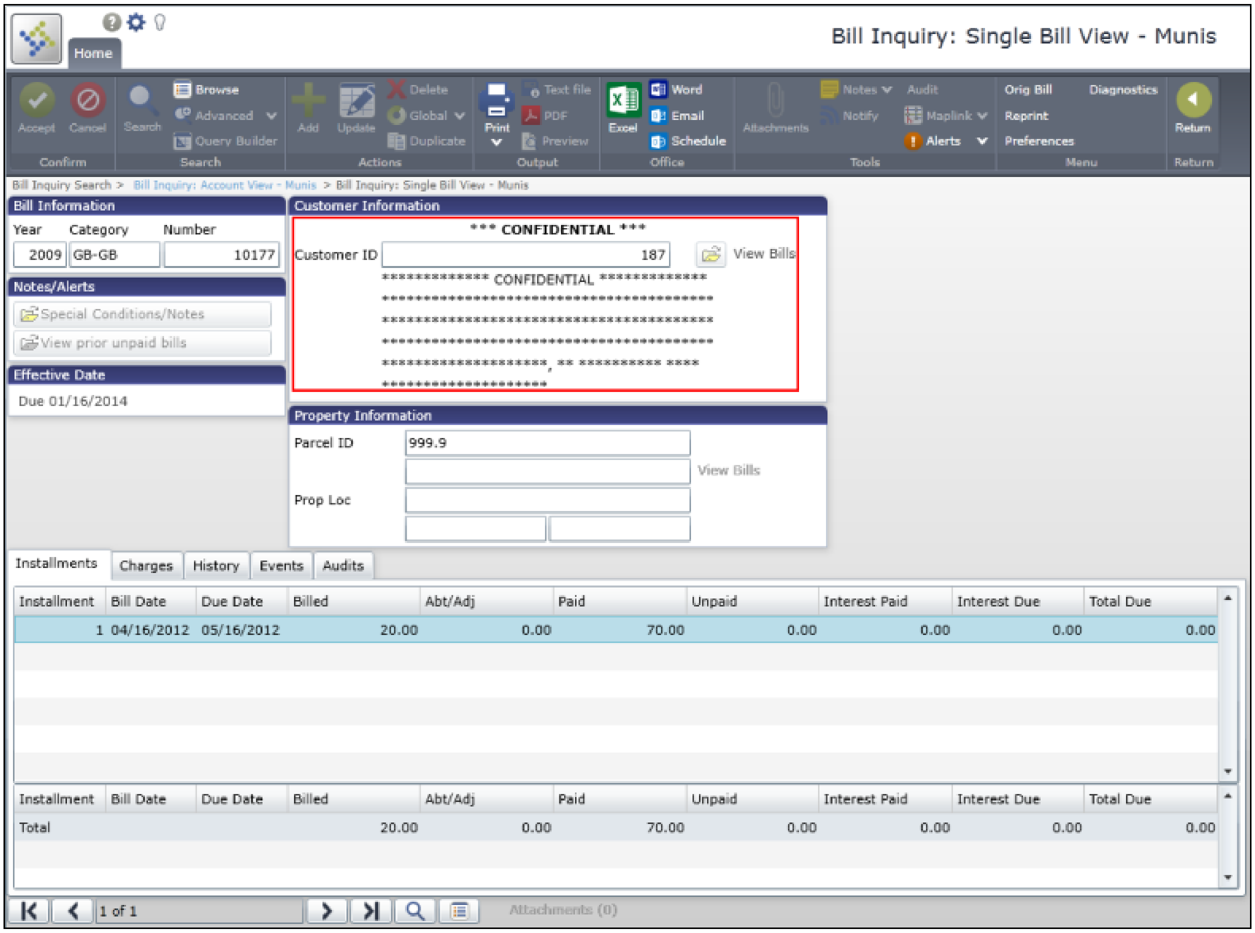
Note: This was previously a setting within the Tax Settings program in the Property Tax module.

Customers

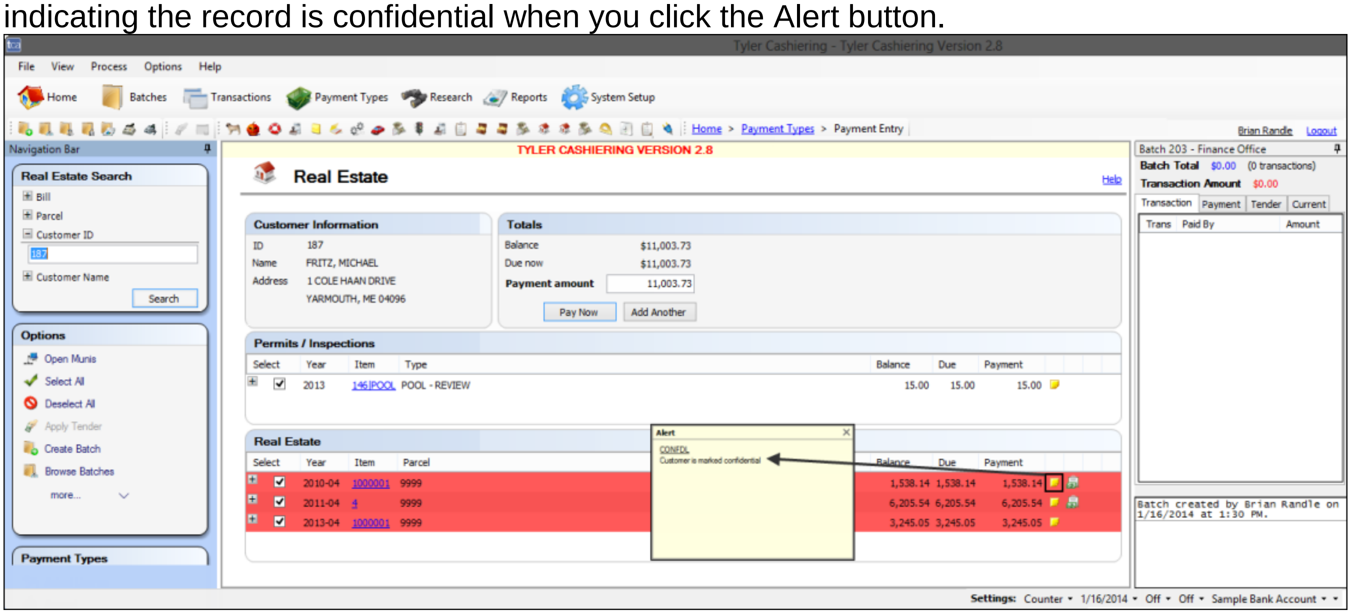
When the Confidential check box is selected for a customer on the Other tab in Customers, the Customers, Bill Inquiry, and Payment Entry programs display "Confidential" in bold letters for records related to the customer if the Restrict to 'Public Access' Use Only check box is not selected on the Munis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



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.

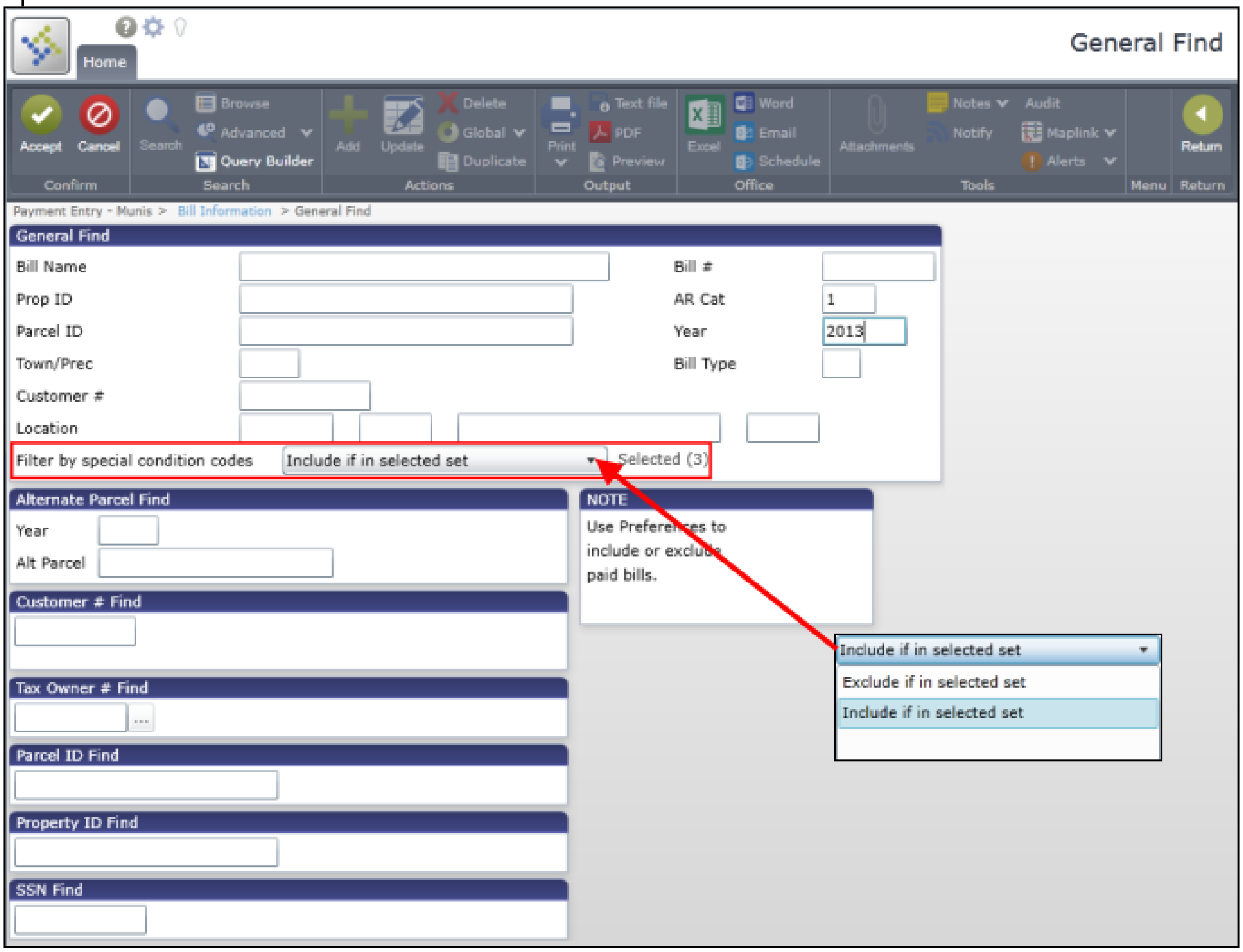


If your site uses the Tyler Cashiering module, the Payment Entry screen displays a message indicating the record is confidential when you click the Alert button.



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.

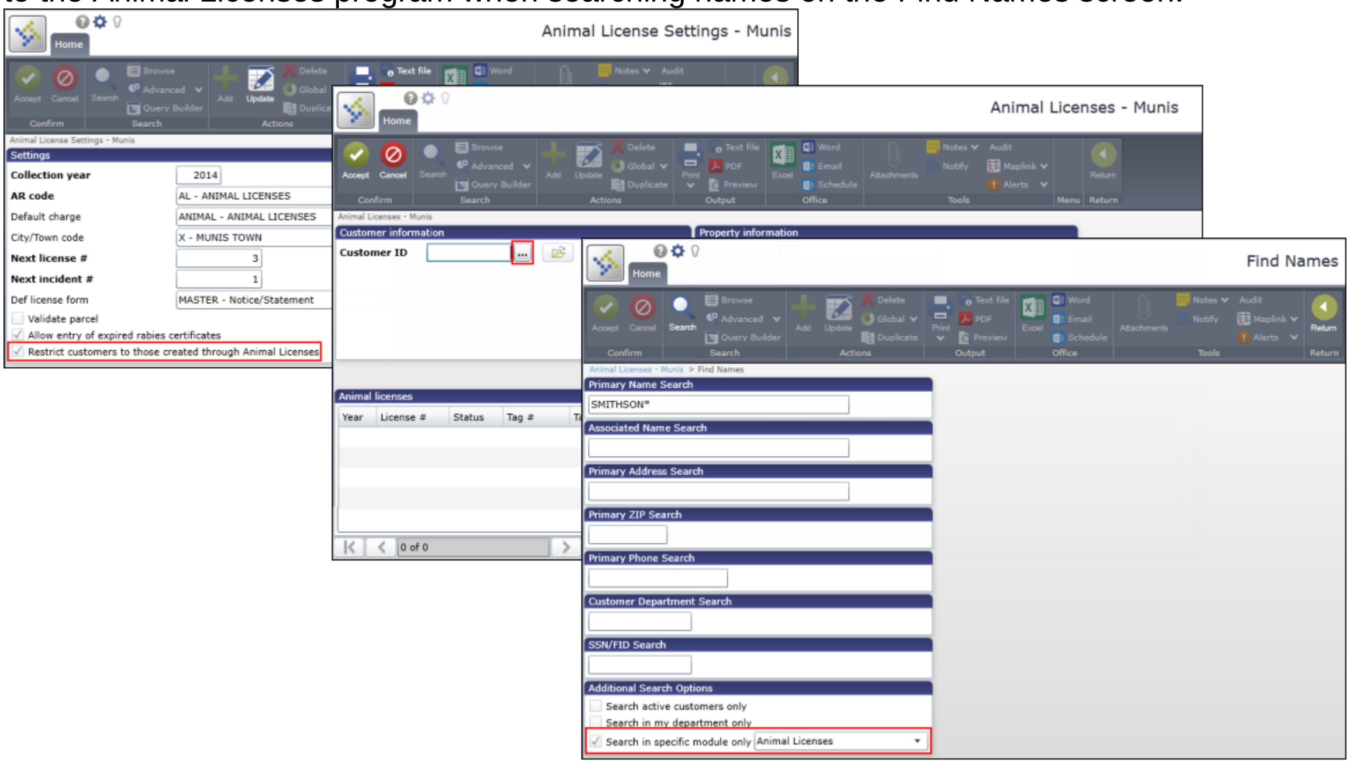


Animal Licenses 10.5

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.

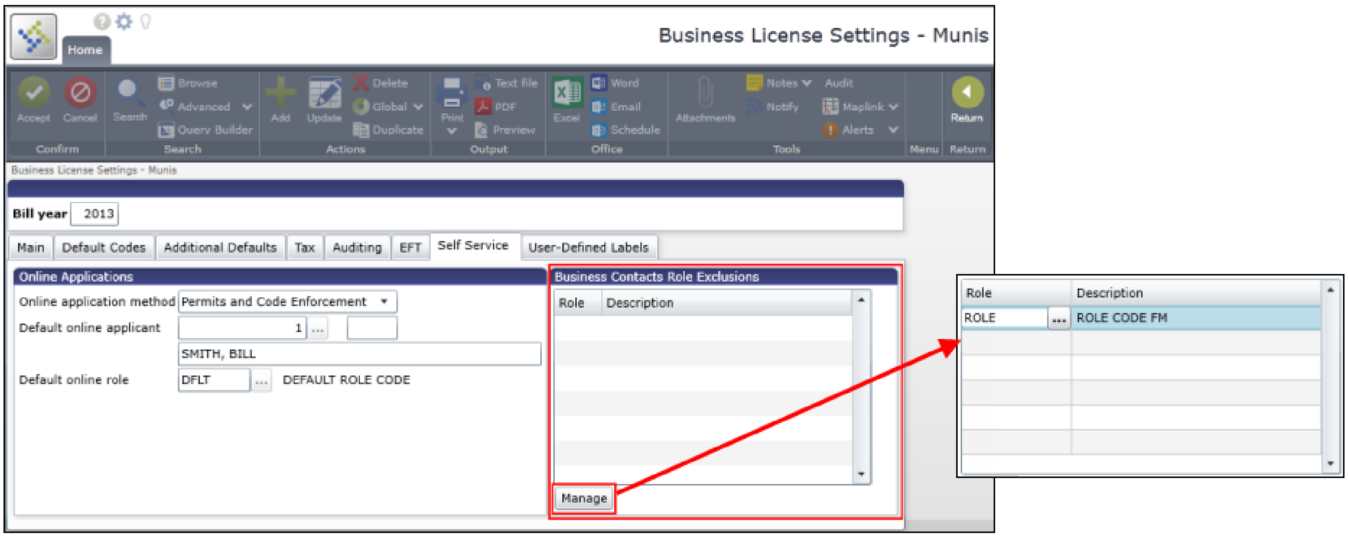


Business Licenses 10.5

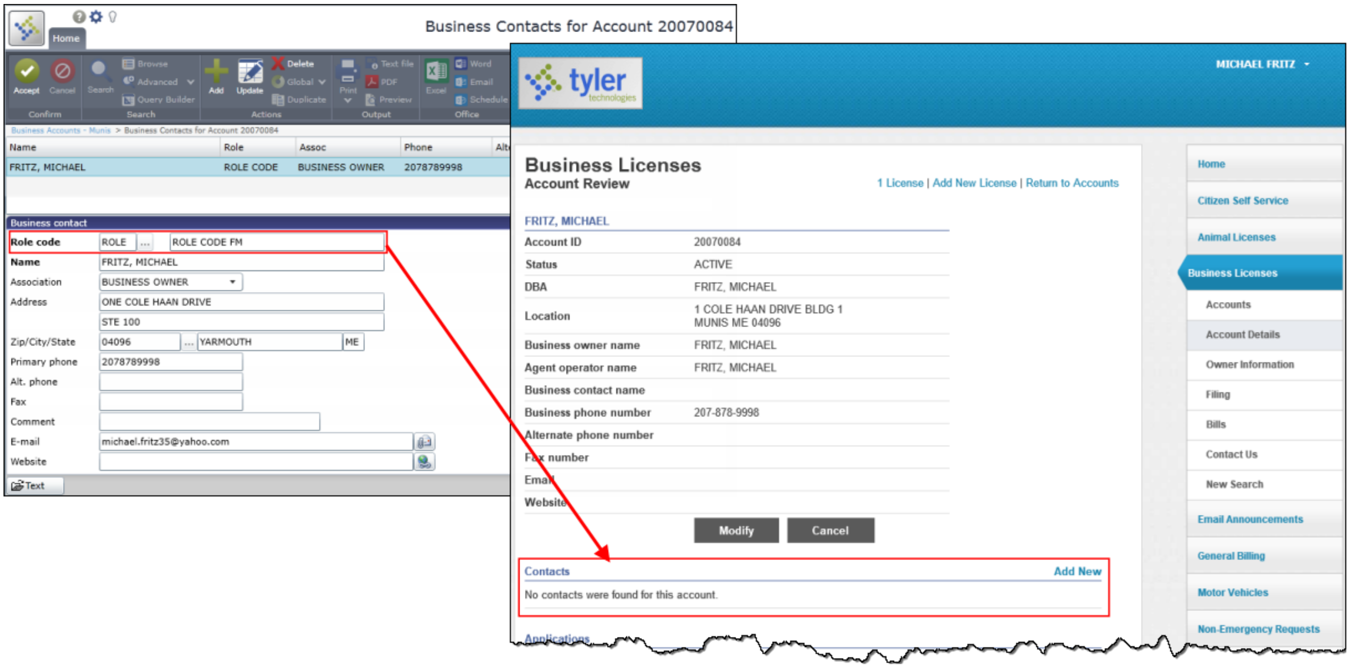
The following changes apply to Munis Business License programs.

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.

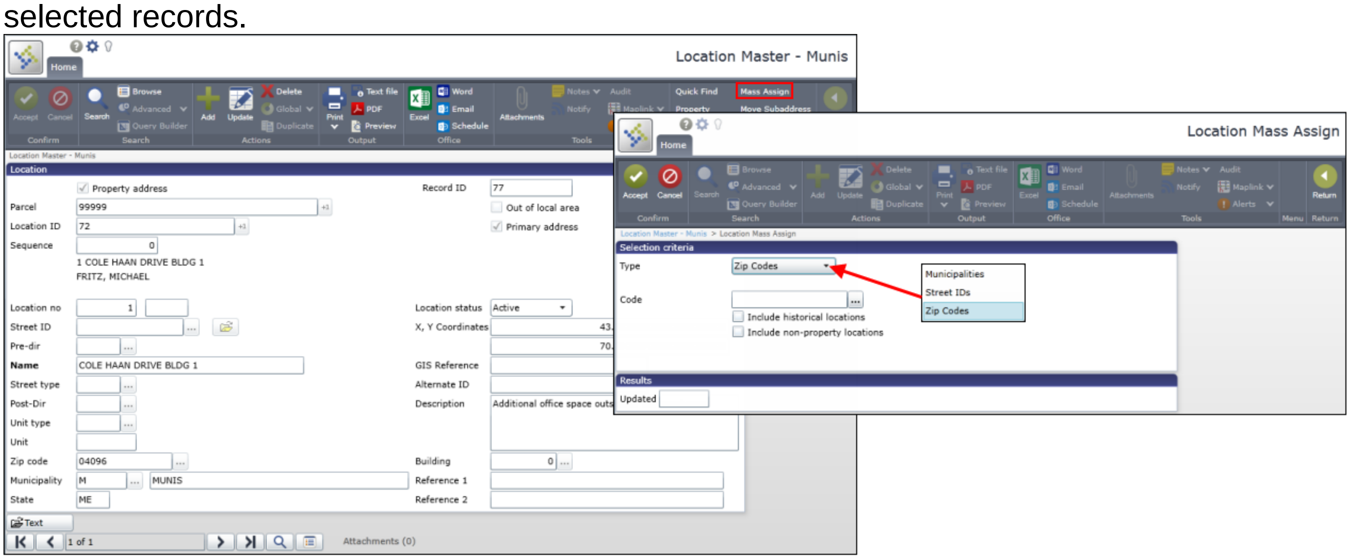


Central Property 10.5

The following changes apply to Munis Central Property programs.

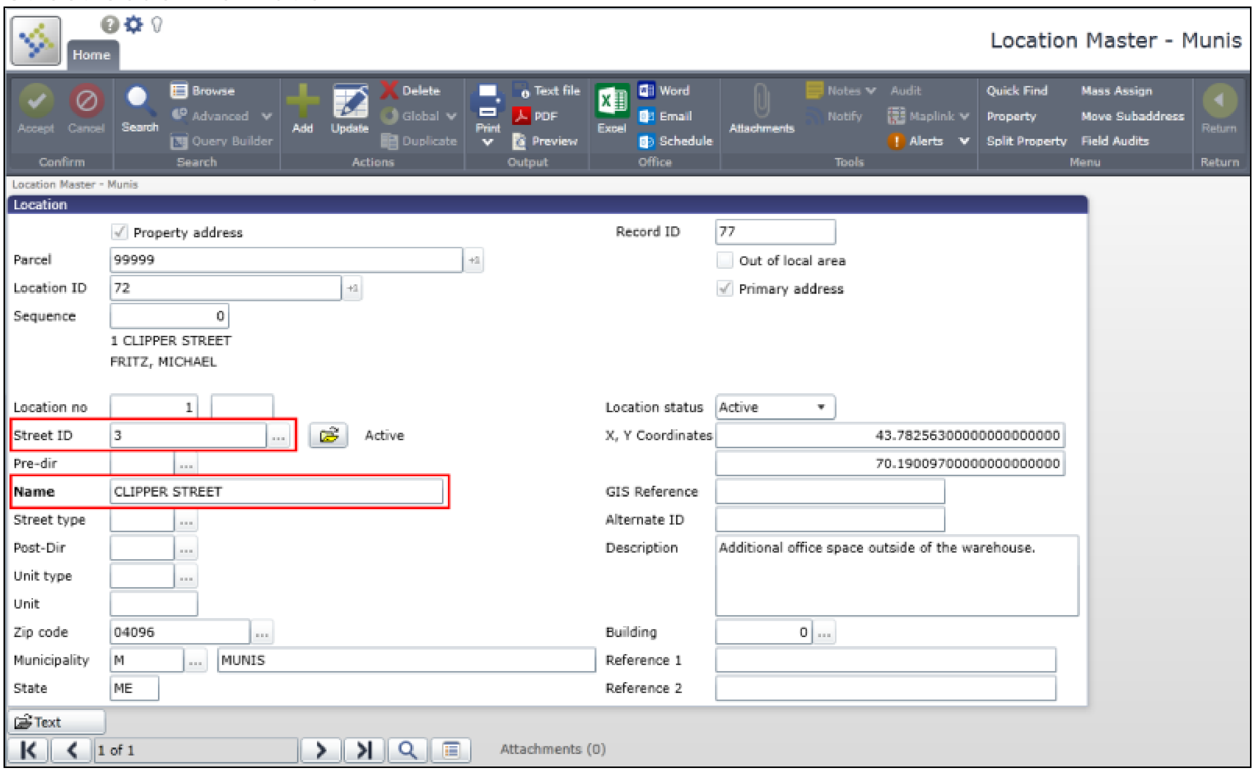
Location Master

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



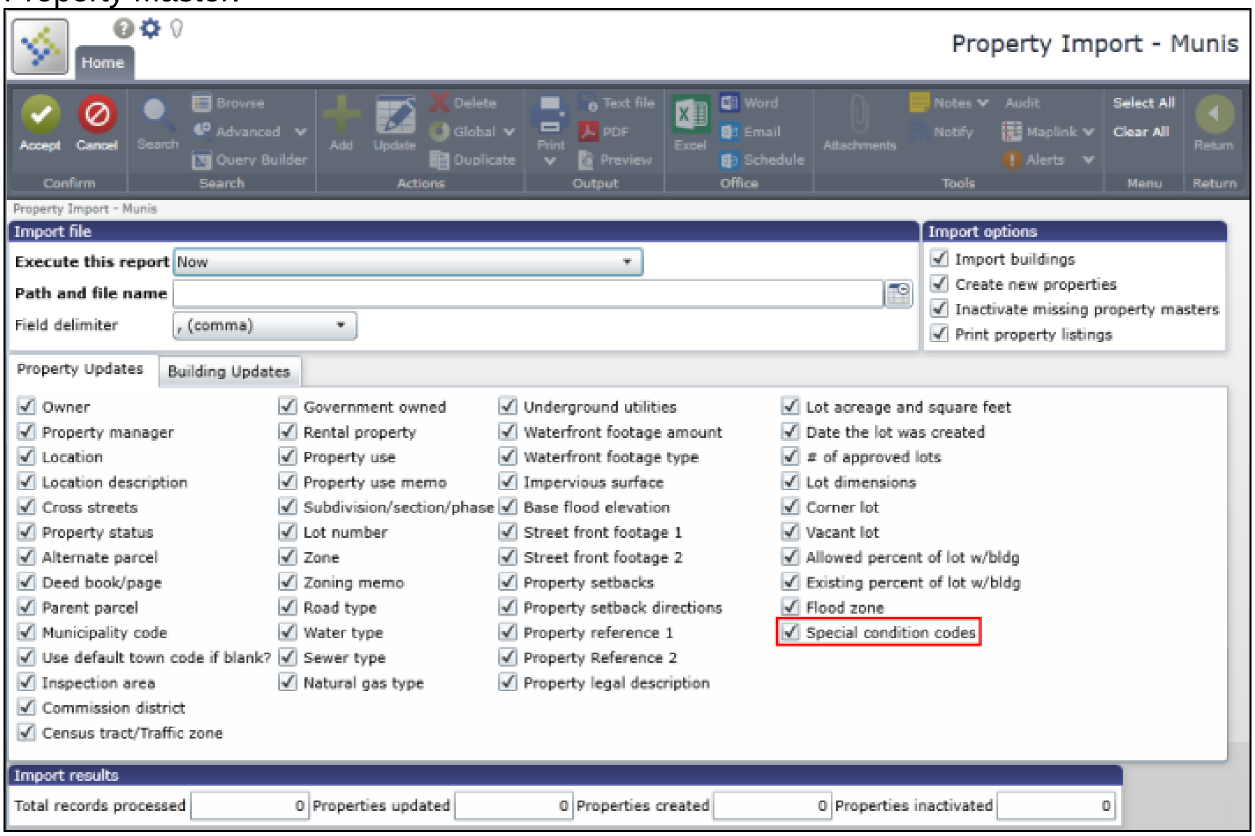
Select Street IDs in the Type list and then process the record.

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



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.



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.

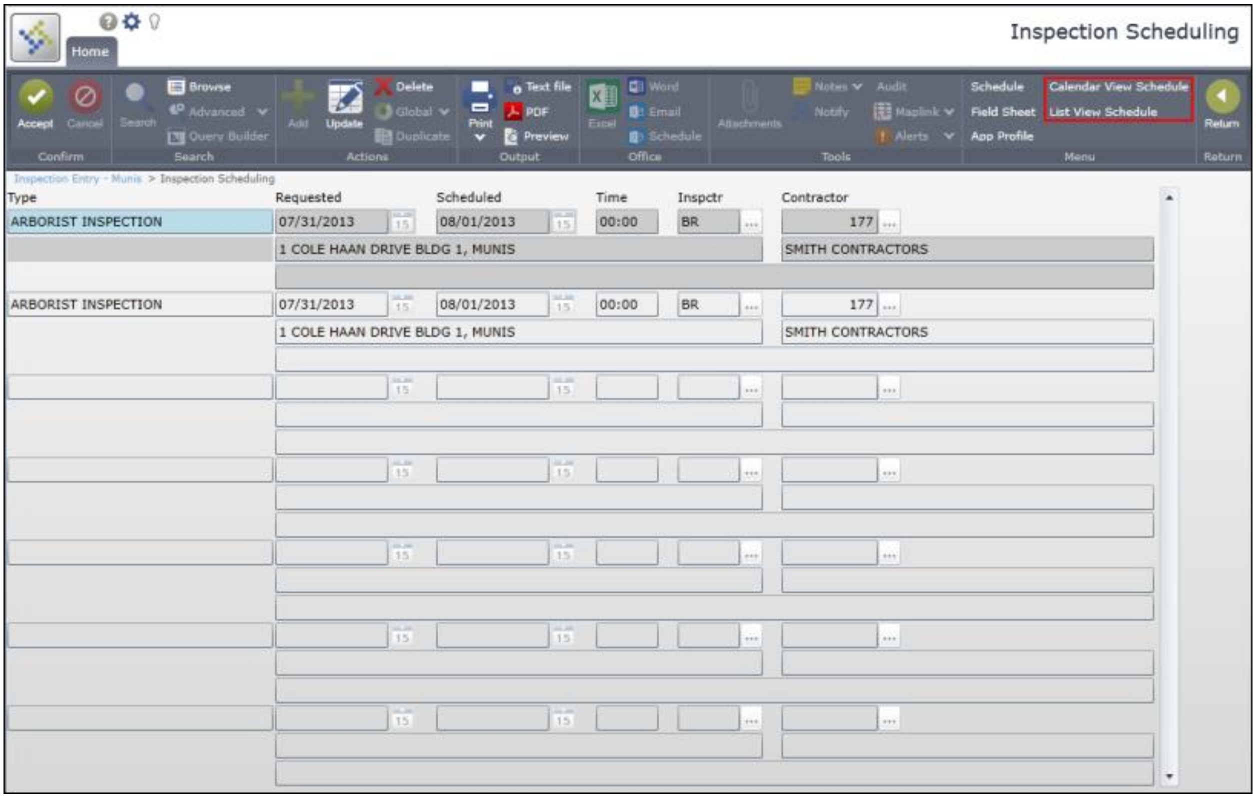
The Standard Property Import includes the primary location ZIP Code™, including the four-digit +4 ZIP Codes, and the property's legal description.

Permits and Code Enforcement 10.5

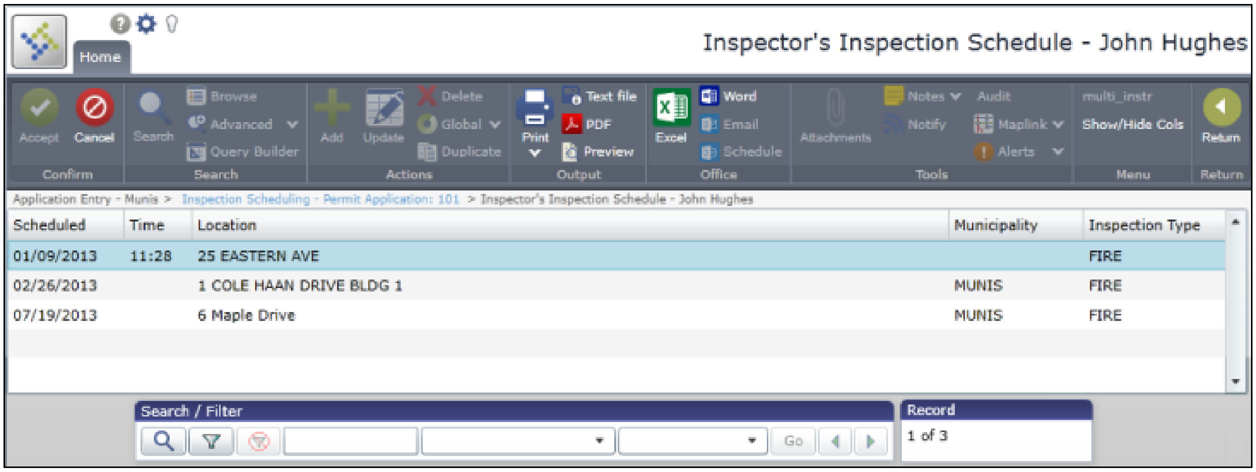
The following changes apply to Munis Permits and Code Enforcement programs.

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.

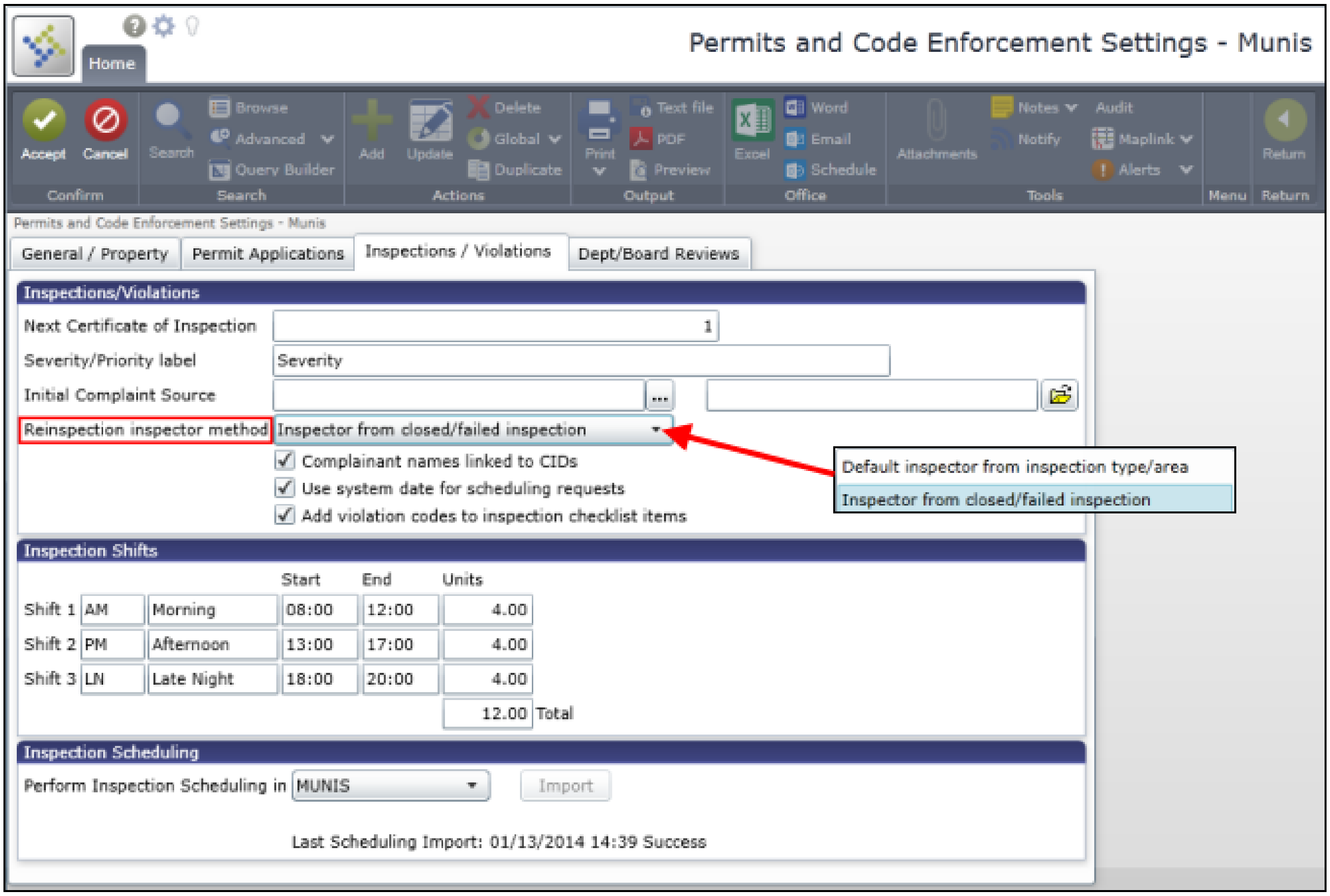


When you click Calendar View Schedule, the program displays the inspector's schedule in a calendar format with tabs for Year, Month, Week, and Day.

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

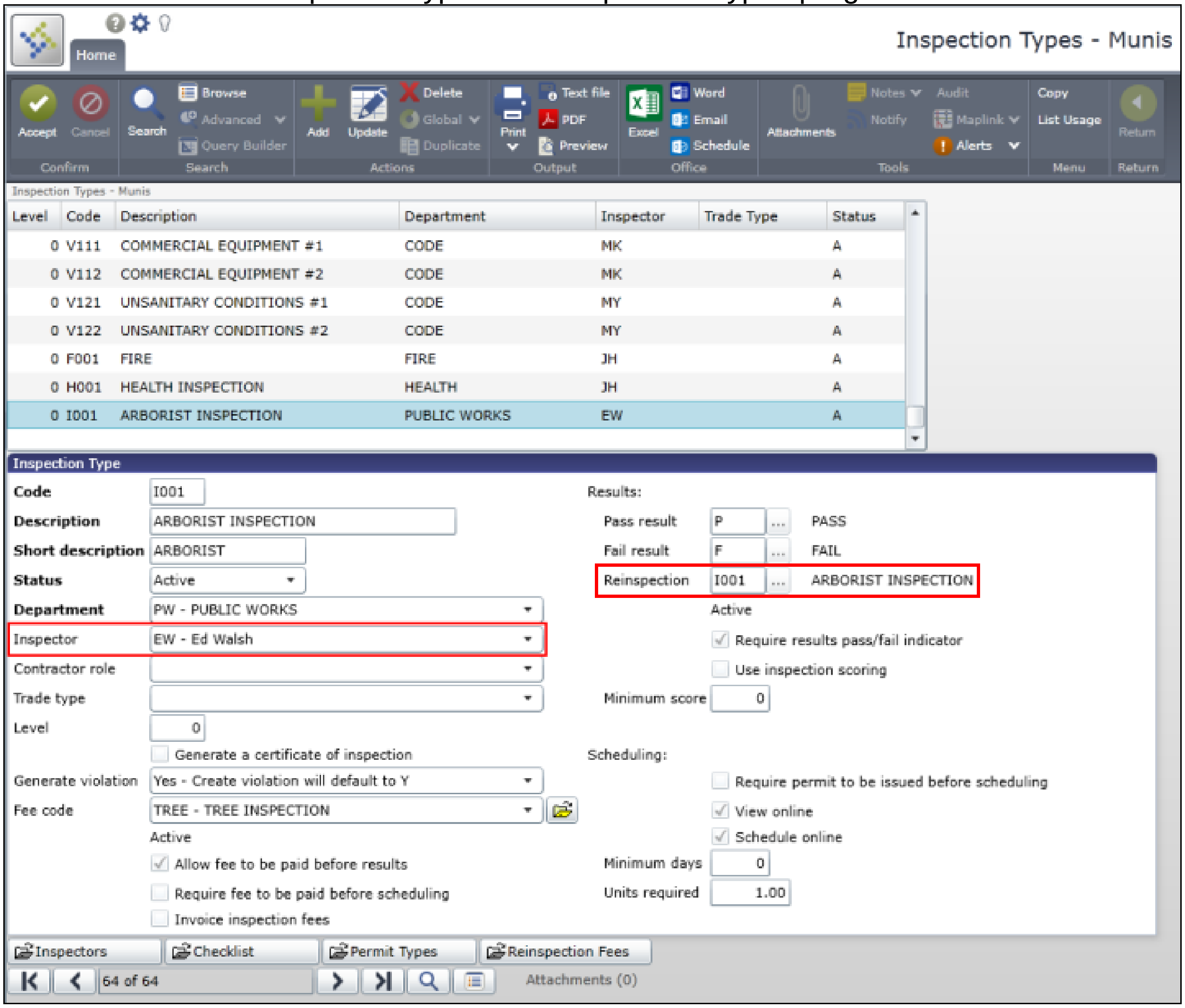
Permit and Code Enforcement Settings

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.

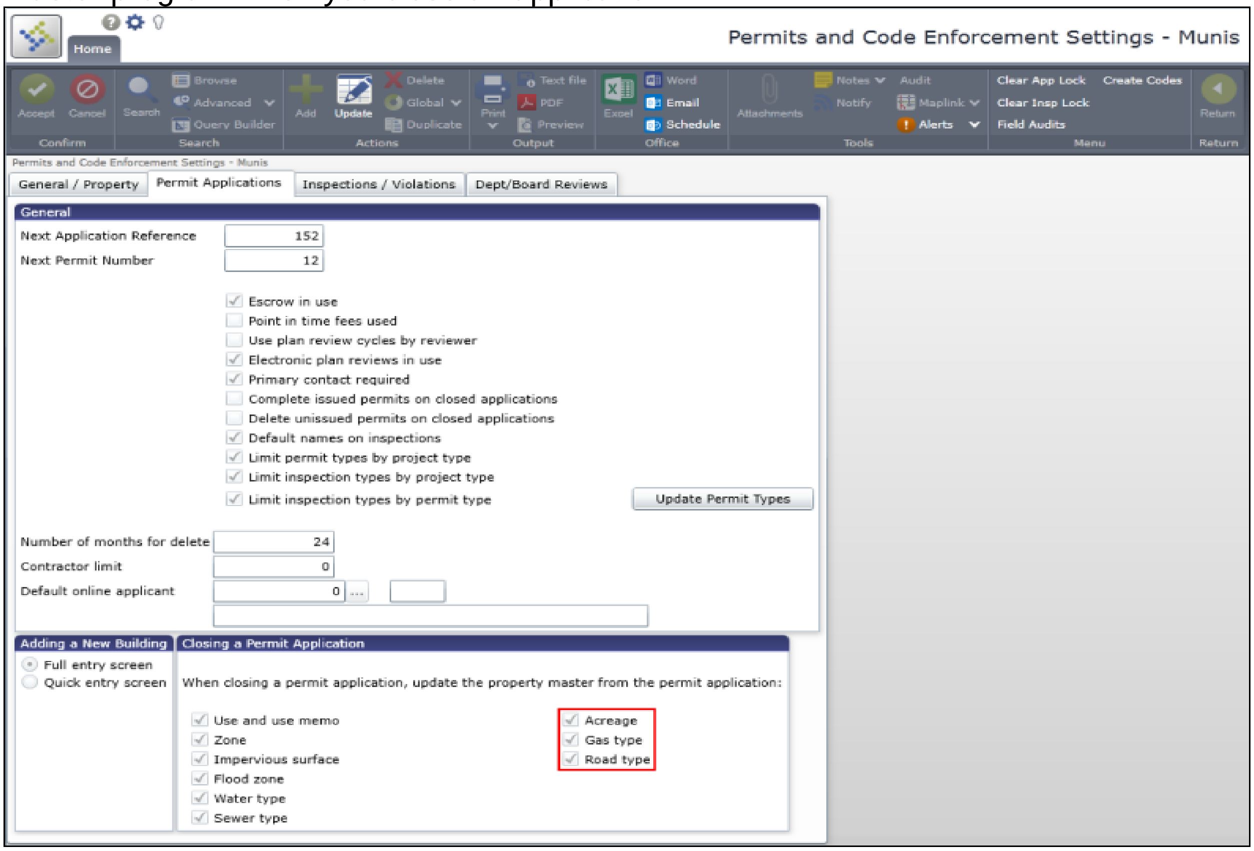


The Inspector from Closed/Failed Inspection option uses the inspector on the record at the time the inspection closes.

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



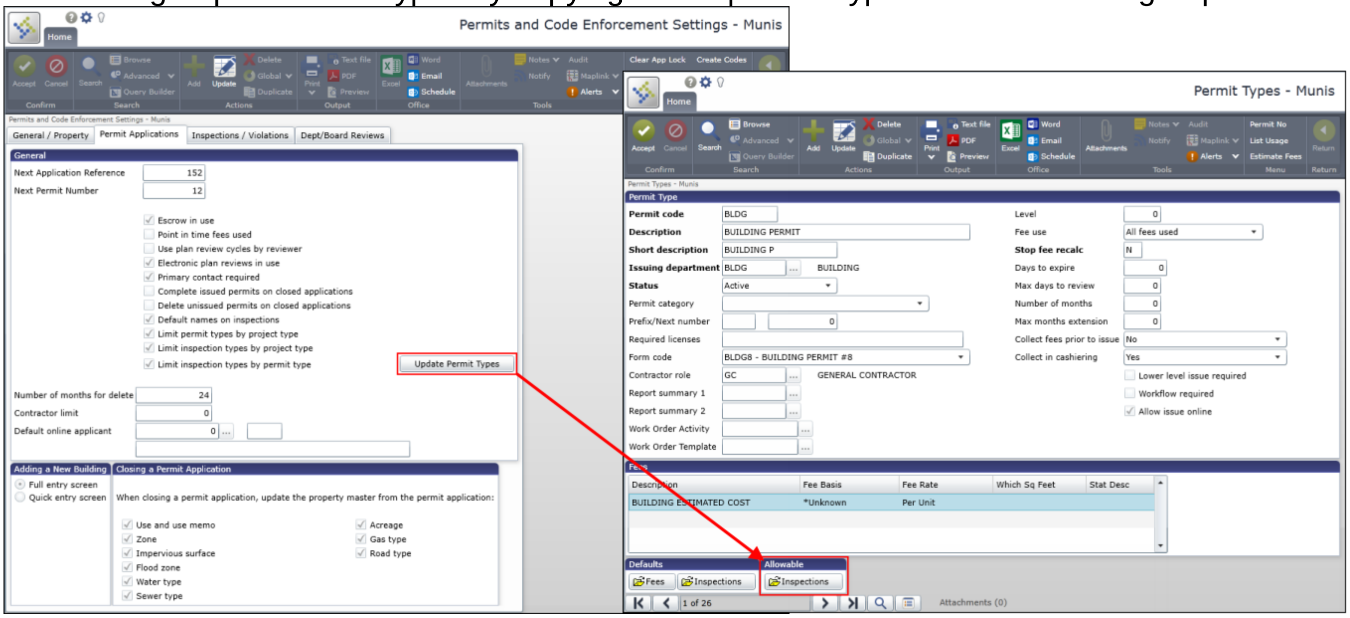
The Acreage, Gas Type, and Road Type check boxes are available on the Permit Applications tab. When selected, these check boxes update the specified data for records in the Property Master program when you close an application.



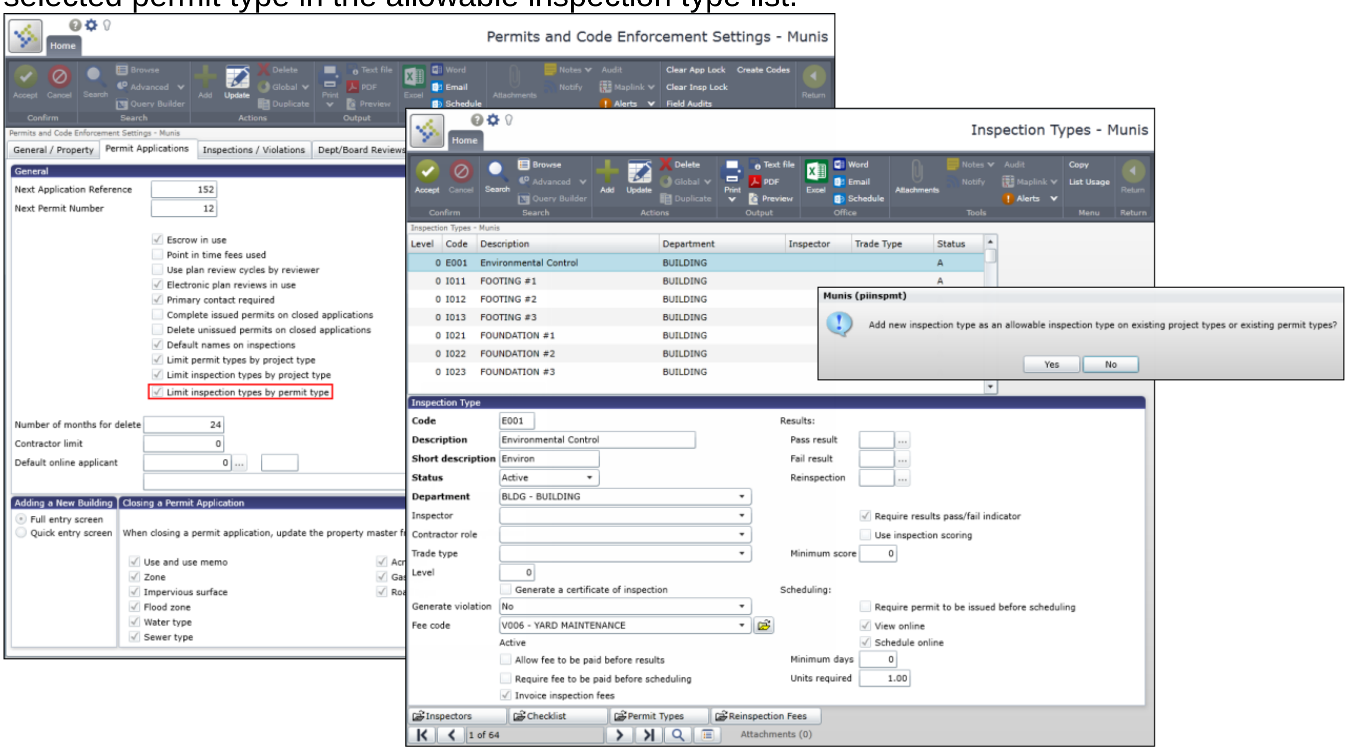
When the permit application closes and the Project Type category is Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal, the following updates occur:

- 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.

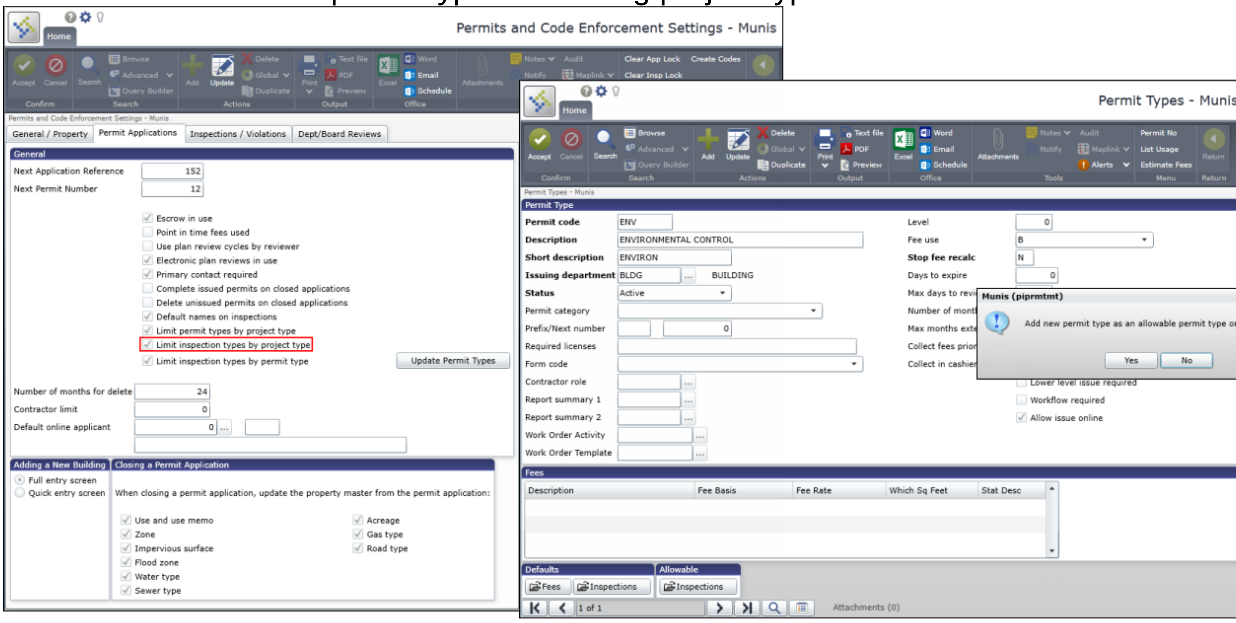
The Update Permit Types button on the Permit Applications tab creates inspection types in the Allowable group in Permit Types by copying the inspection types in the Defaults group.



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.

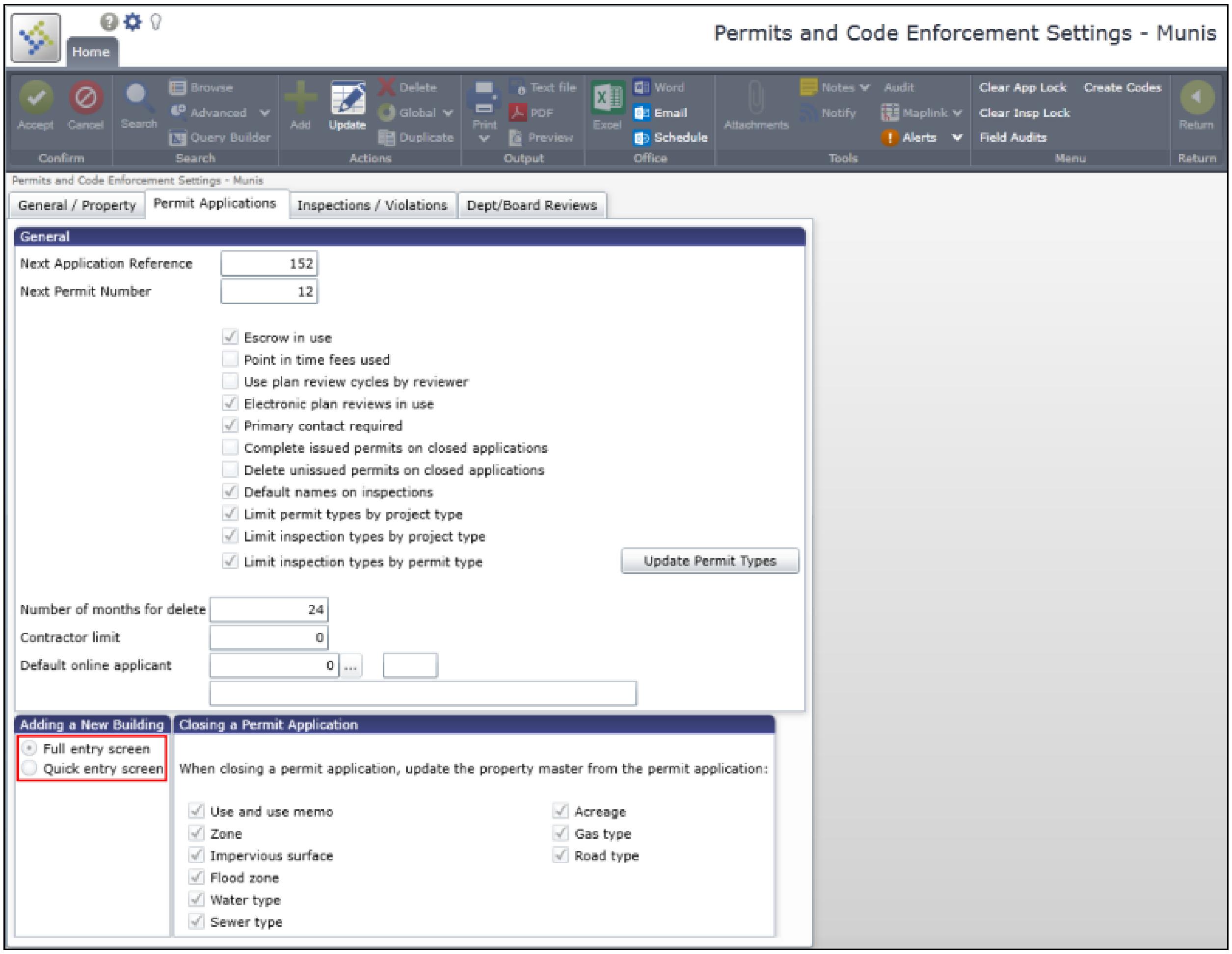


When the Limit Permit Types by Project Type check box is selected and you click the Update Permit Types button, the Project Type program includes Permits in the Allowable group, where the existing permit type is also in the Defaults group. When you add a new Permit Type, the program displays a confirmation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

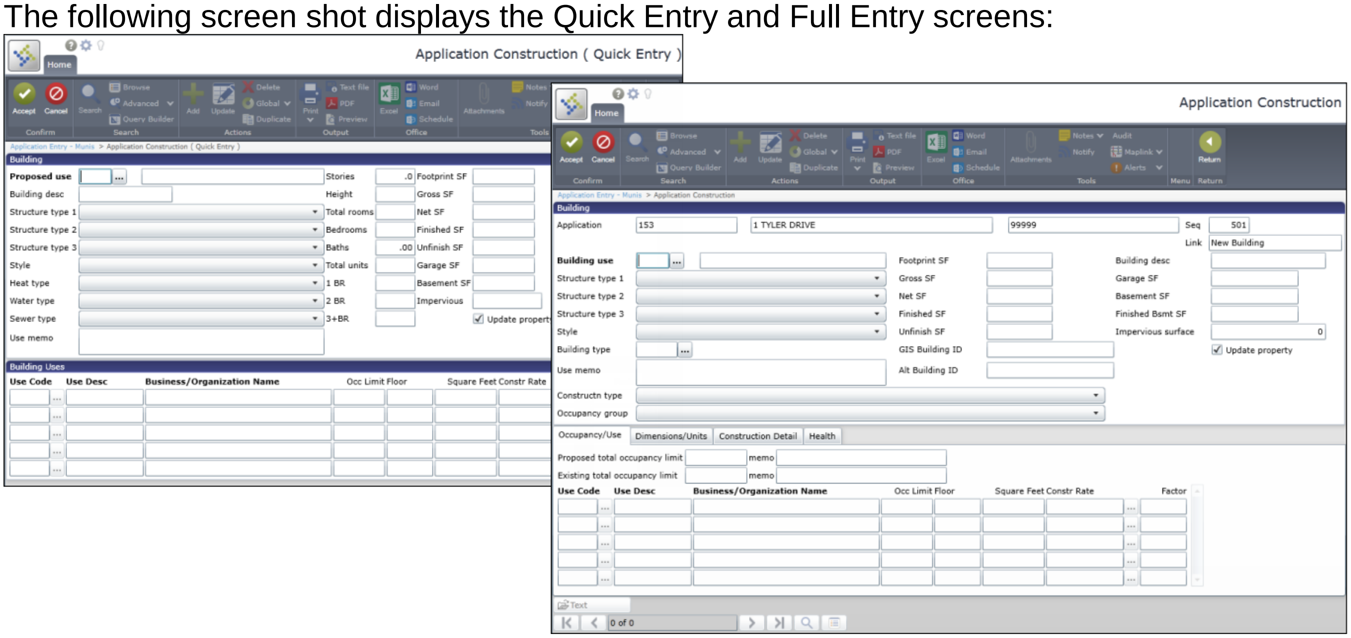


When you use allowable inspection types, the main screen of Inspection Entry and the Add Multiple screen (accessible through the Inspection Scheduling option) limit the inspection types to only the allowable inspection types for the permit type. If the inspection is not linked to a permit application,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

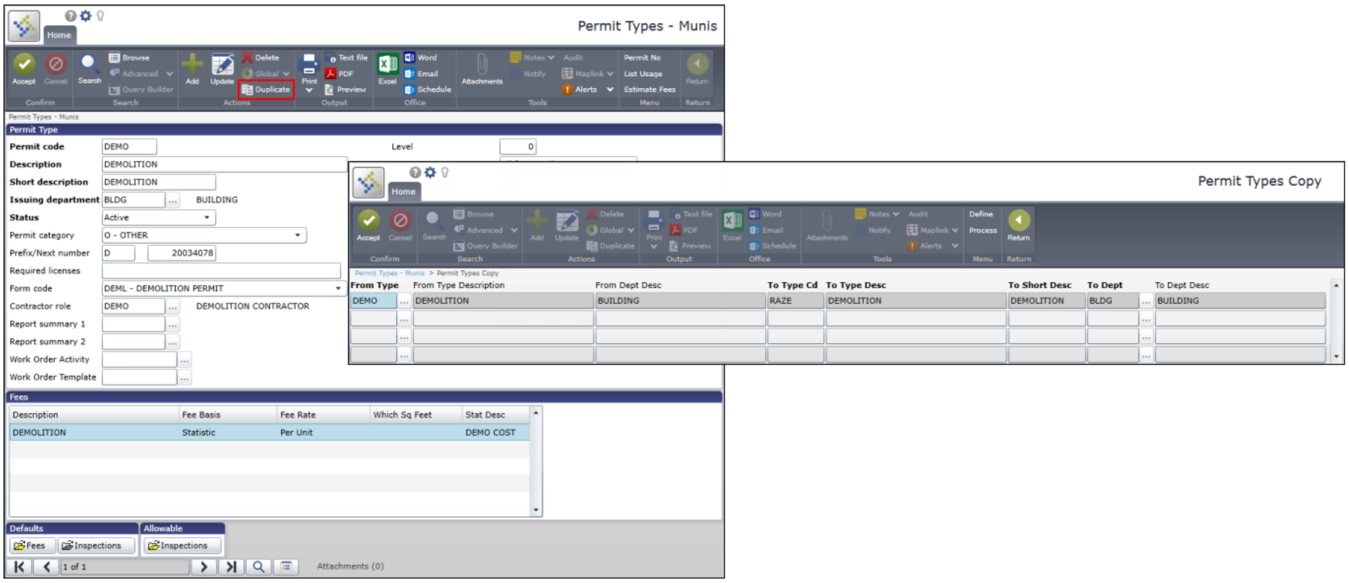


The following screen shot displays the Quick Entry and Full Entry screens:



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.

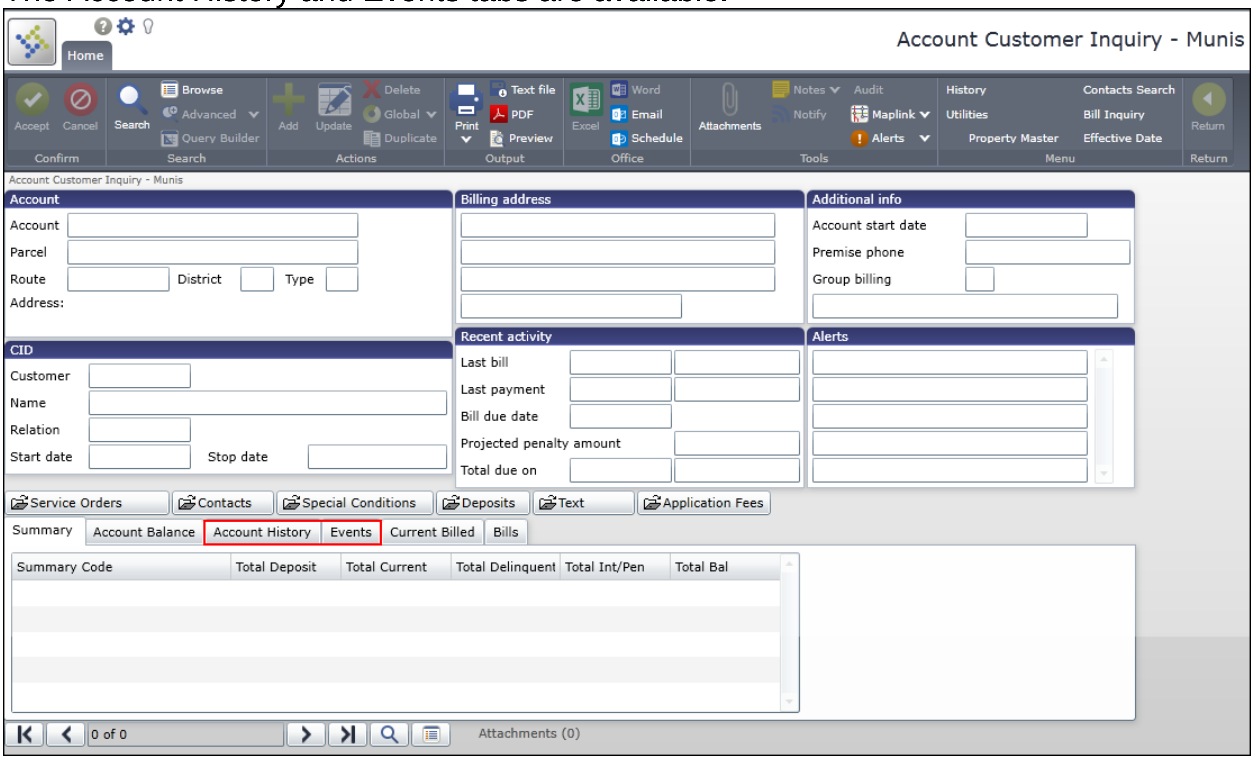


Utility Billing – CIS 10.5

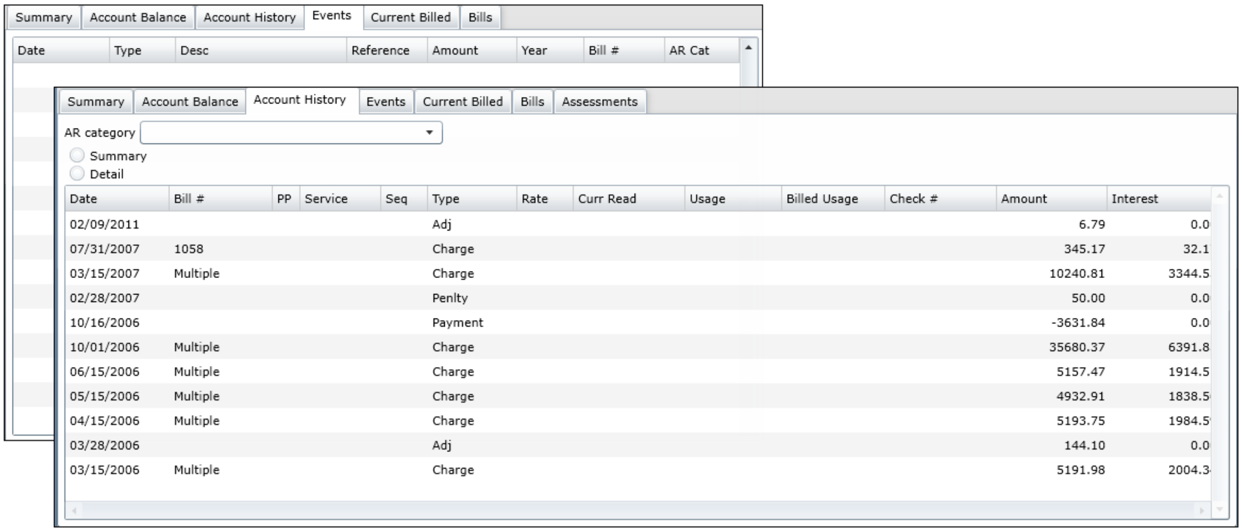
The following changes apply to Munis Utility Billing – CIS programs.

Account Customer Inquiry

The Account History and Events tabs are available.

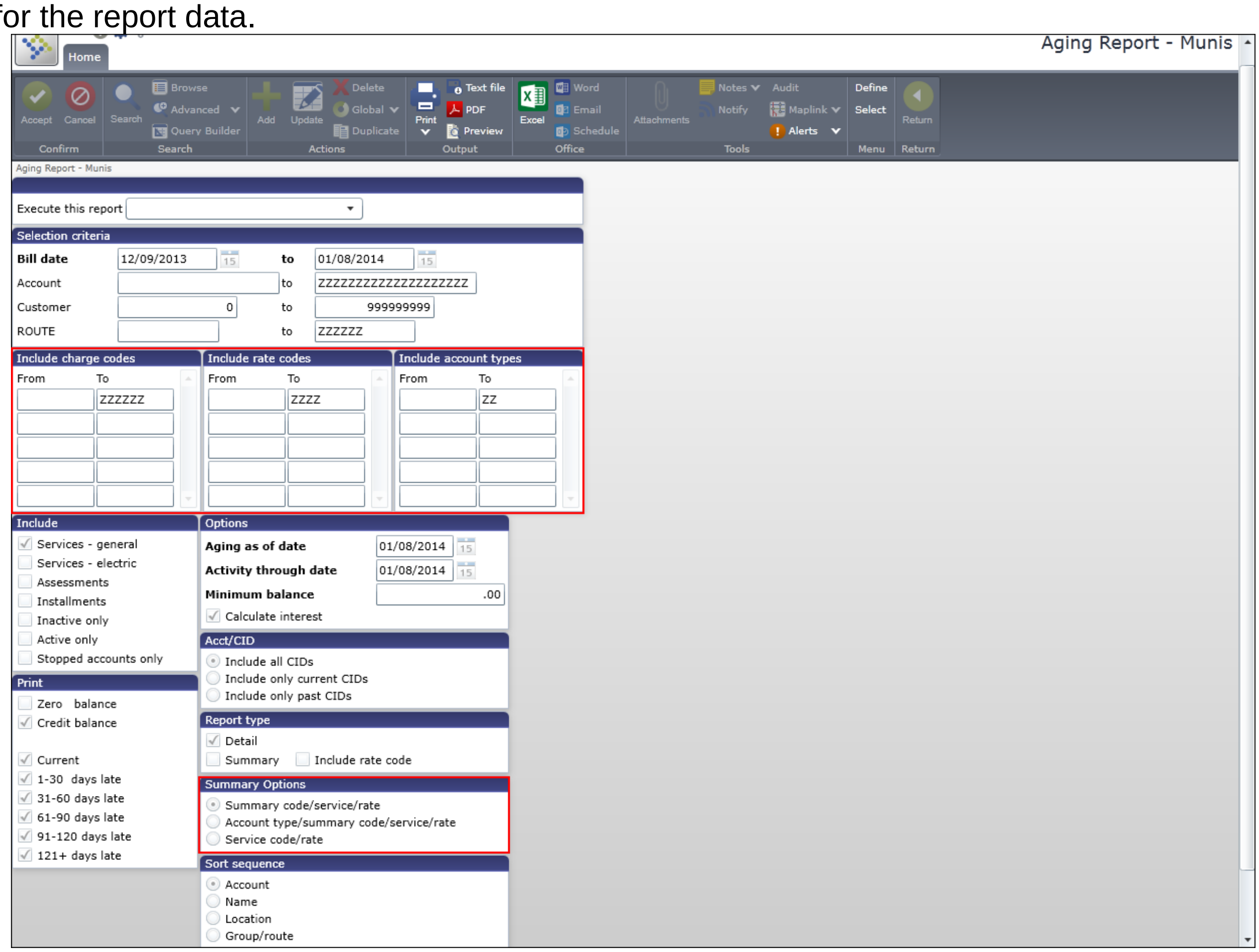


The Events tab displays event history associated with the account/CID and offers filtering capability. The Account History tab provides summary and detail transaction data, viewable by AR category. The account history information is also available using the Account History program.



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.



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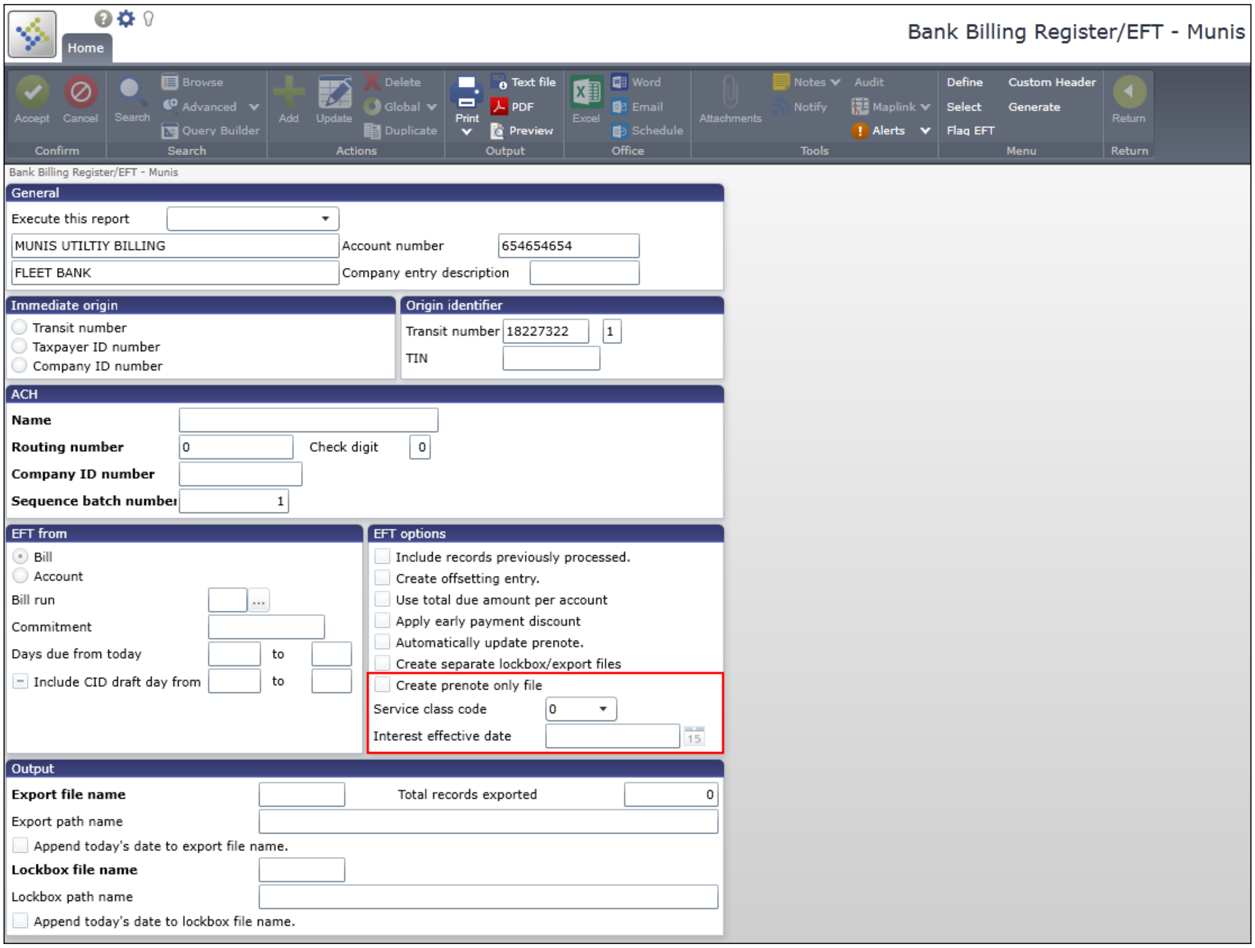
If you select the Summary check box in the Report Type group, the Summary Options group is accessible. Select one of these options to specify how the report summarizes amounts.

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.



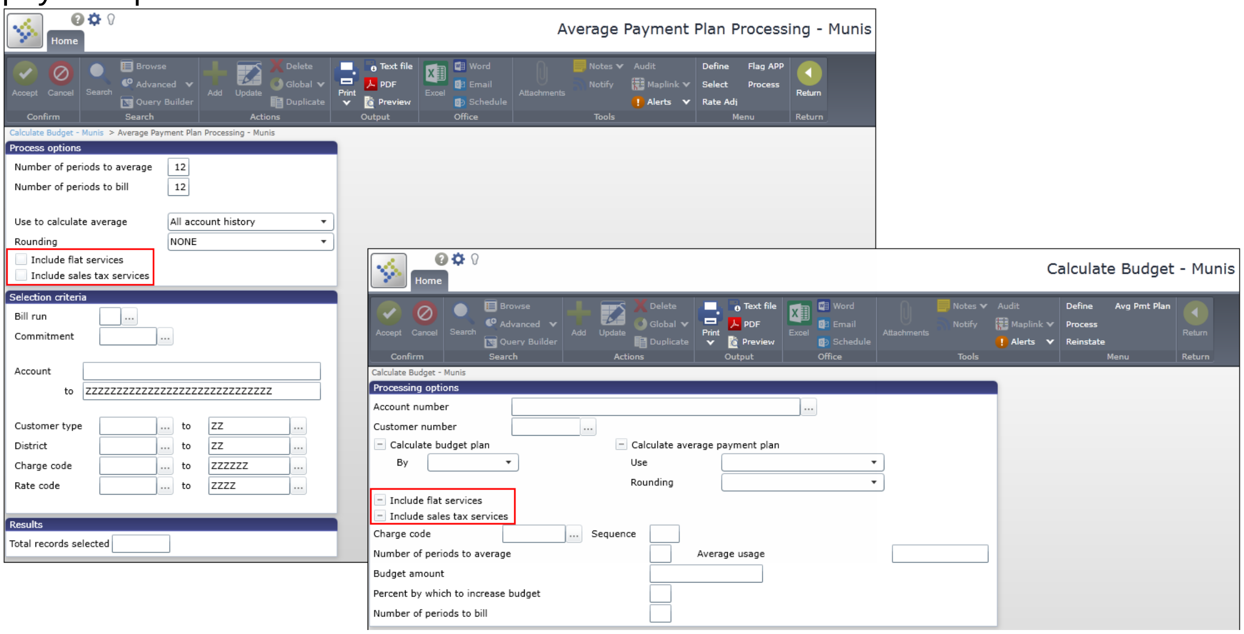
The Create Prenote Only File check box in the EFT Options group allows you to create an EFT prenote outside of the bill run process.

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.



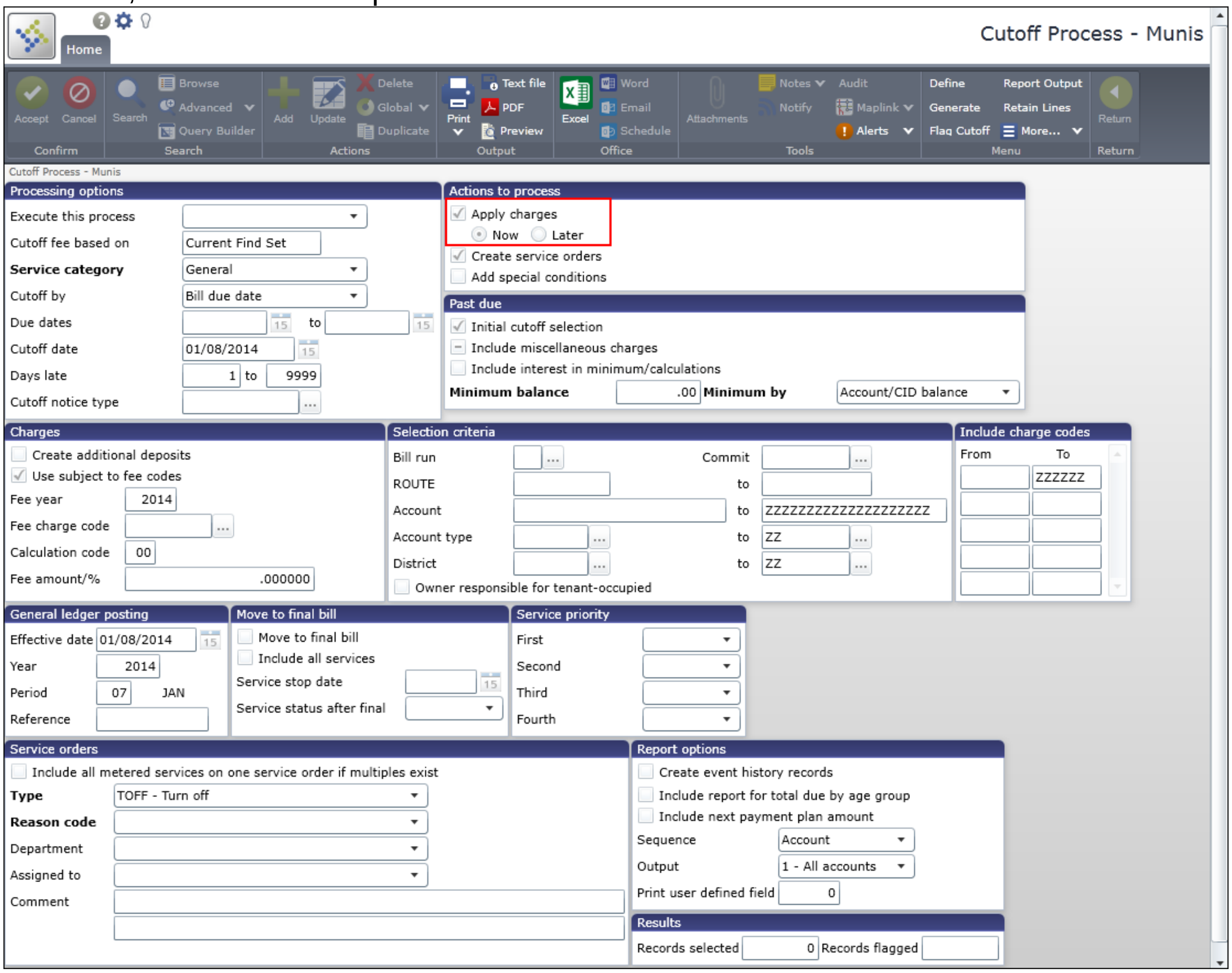
In the Calculate Budget program, these check boxes are used for initial enrollment into budget/payment plans. They are only accessible when the value of the Process By list in the Settings program is Account. In the Average Payment Plan Processing program, these fields are used with the annual recalculation/amortization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

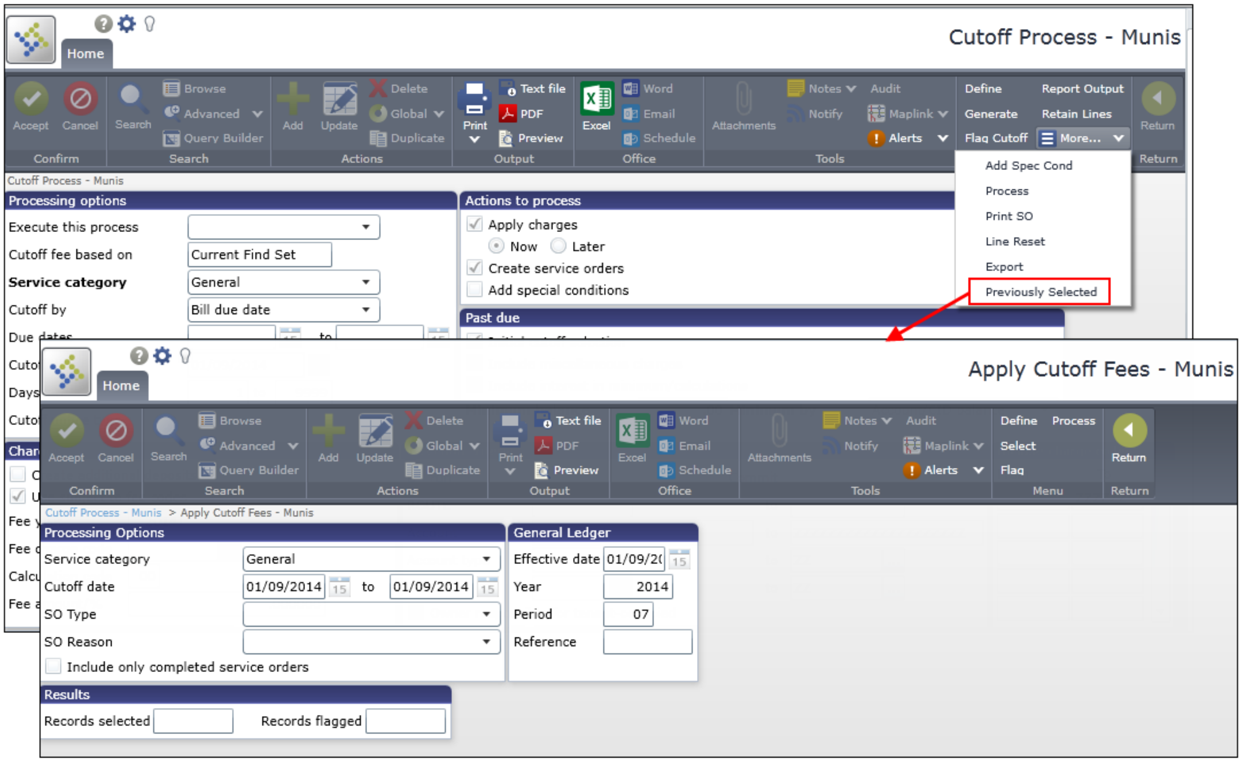
For Average Payment Plan Processing, these check boxes, if selected, direct the program to use the same functionality as described for the Calculate Budget process during the annual recalculation/amortization process.

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.

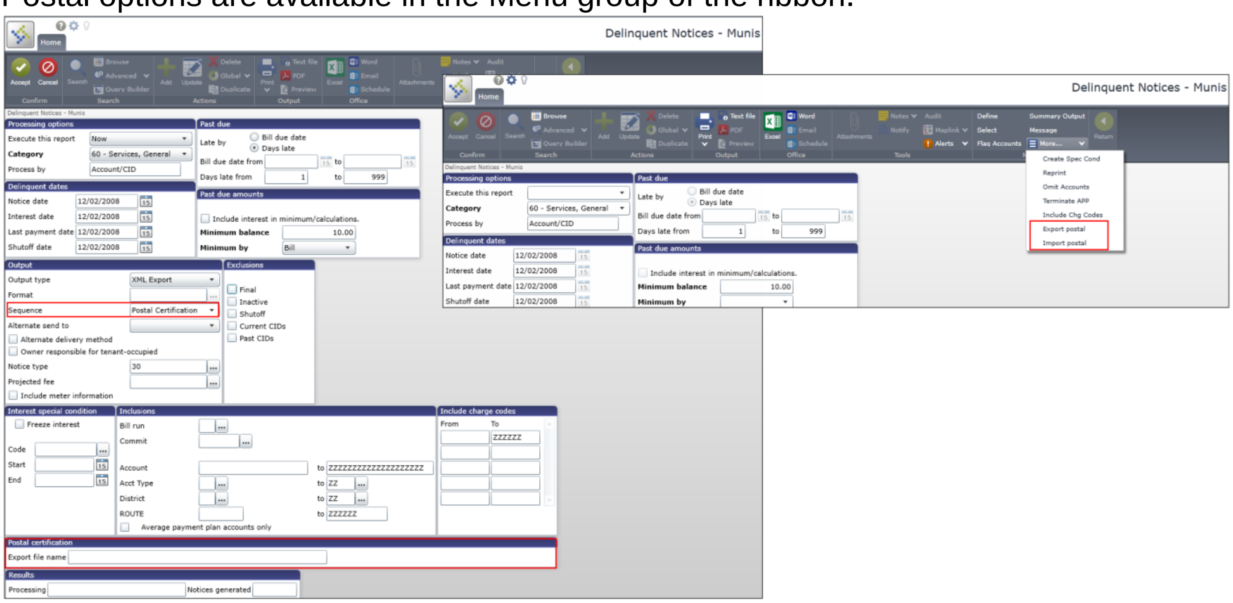


When you choose to apply charges later, use the Previously Selected option on the Menu group of the ribbon to process these charges.



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.

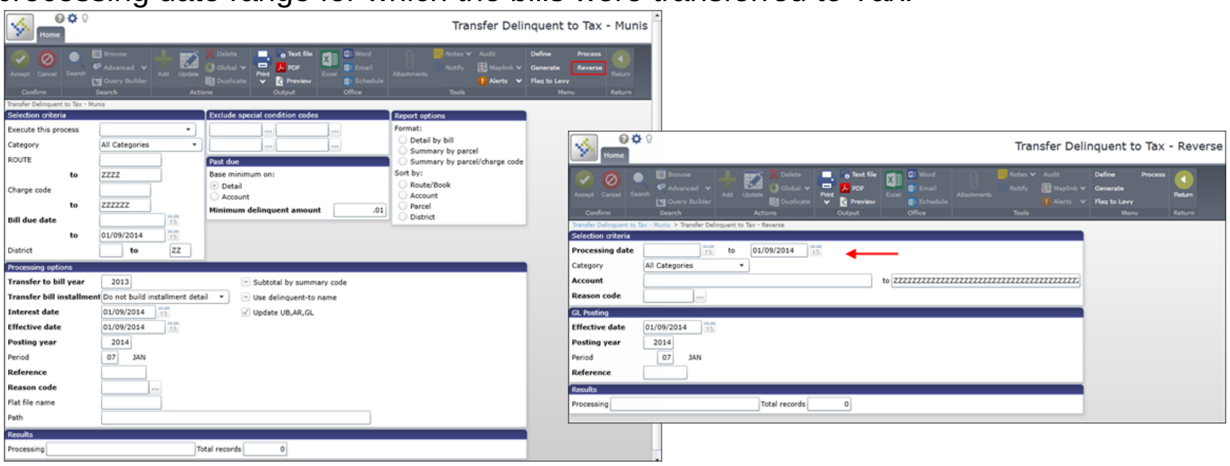


After the Select step is complete, click Export Postal to export a flat file to the spool directory. Enter a file name in the Export File Name box in the Postal Certification group and click Accept to create the file. Once the file is stored on the spool directory, the program displays a query box that 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.



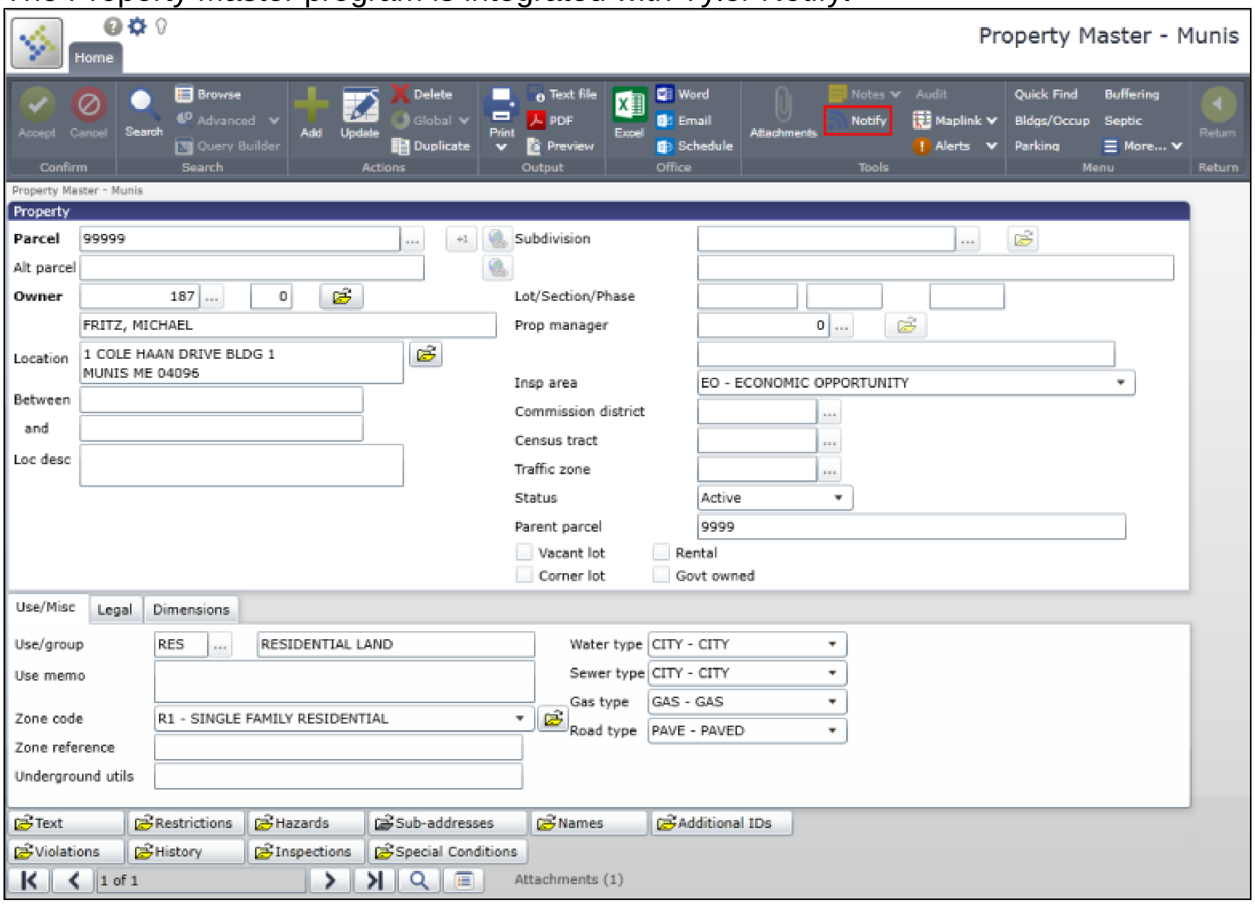
When you generate the reversal, use the Flag to Levy option to identify each account to which the reversal applies. Click Process to complete the reversal.

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

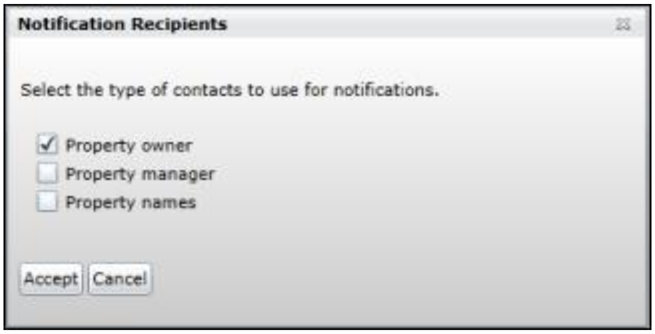
Tyler Notify 10.5

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.

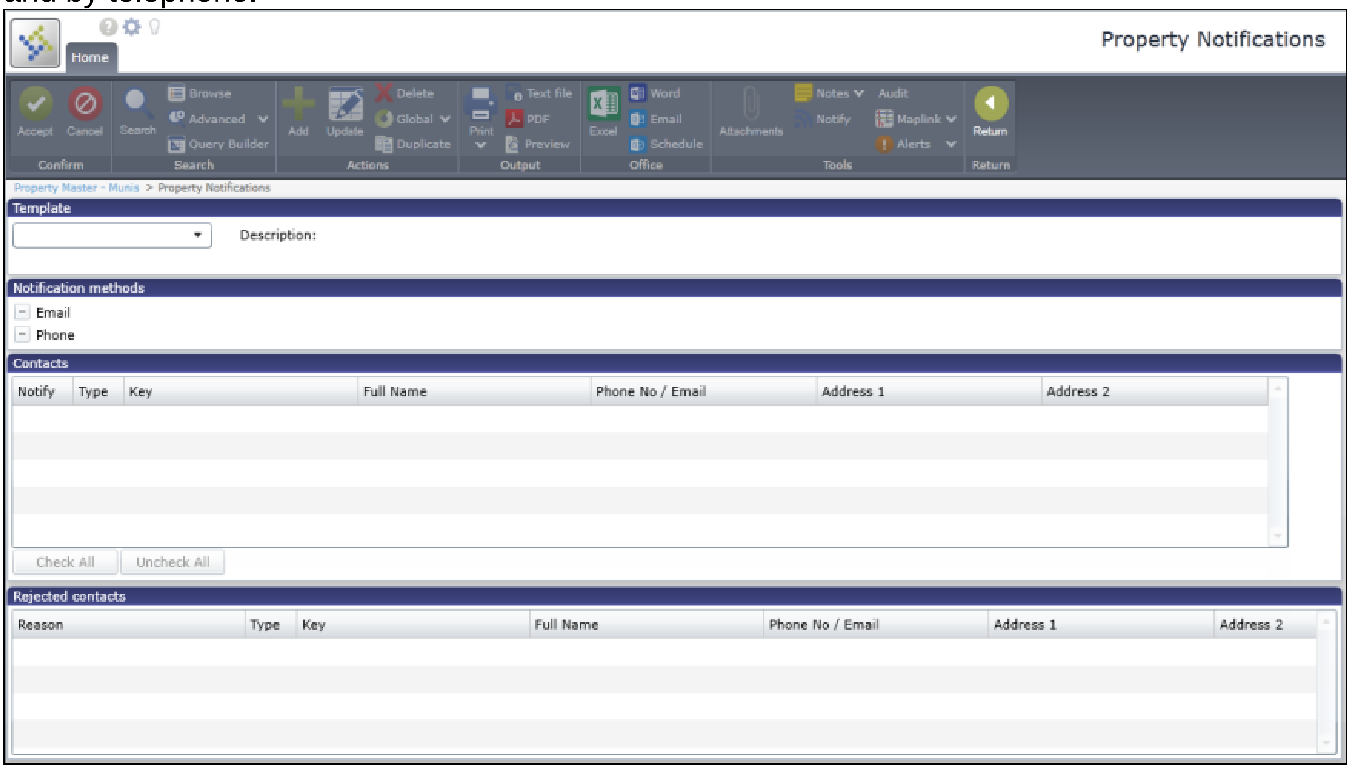
The Property Master program is integrated with Tyler Notify.



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

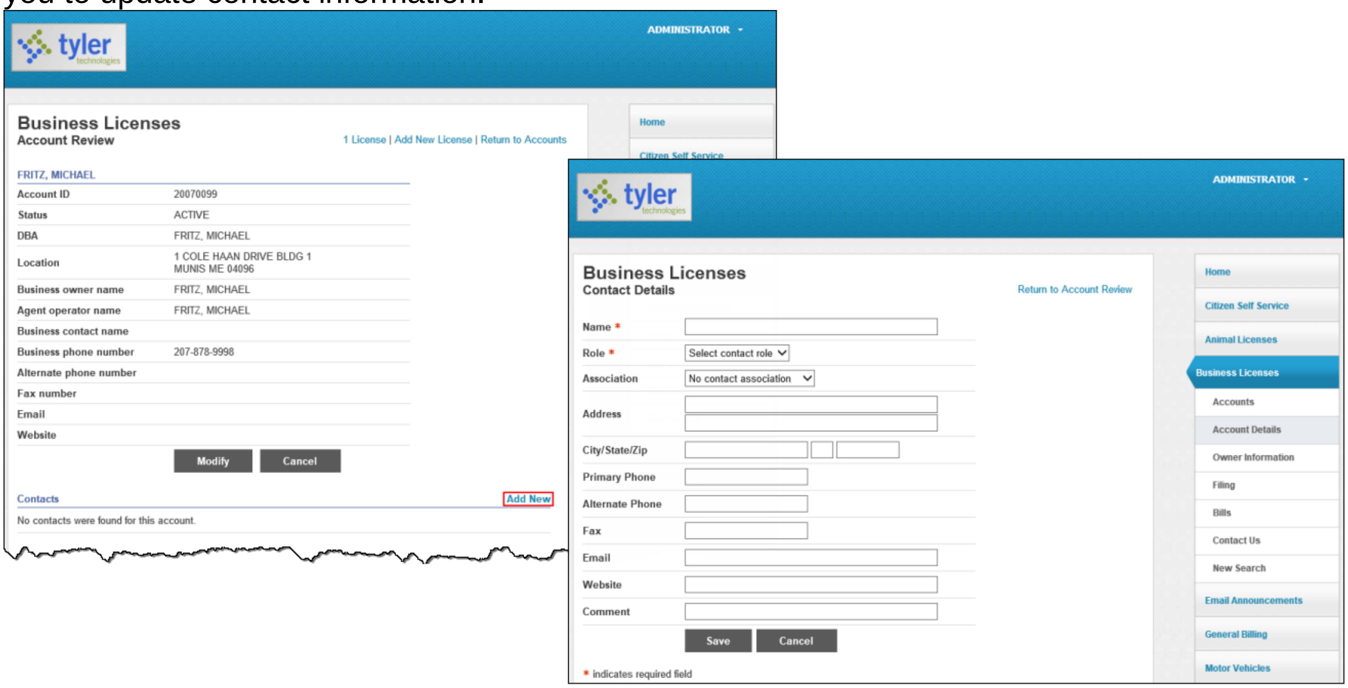
Module	Field Name	Description
Permits and Code Enforcement		
		The Permits and Code Enforcement Roles screen is reorganized to include the Permit Applications/Contractors, Inspections/Violations, and Collections/Others tabs, in addition to the Property Role Permissions tab. The Permit Applications/Contractors 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. Note: These permissions are intended for future functionality.

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.

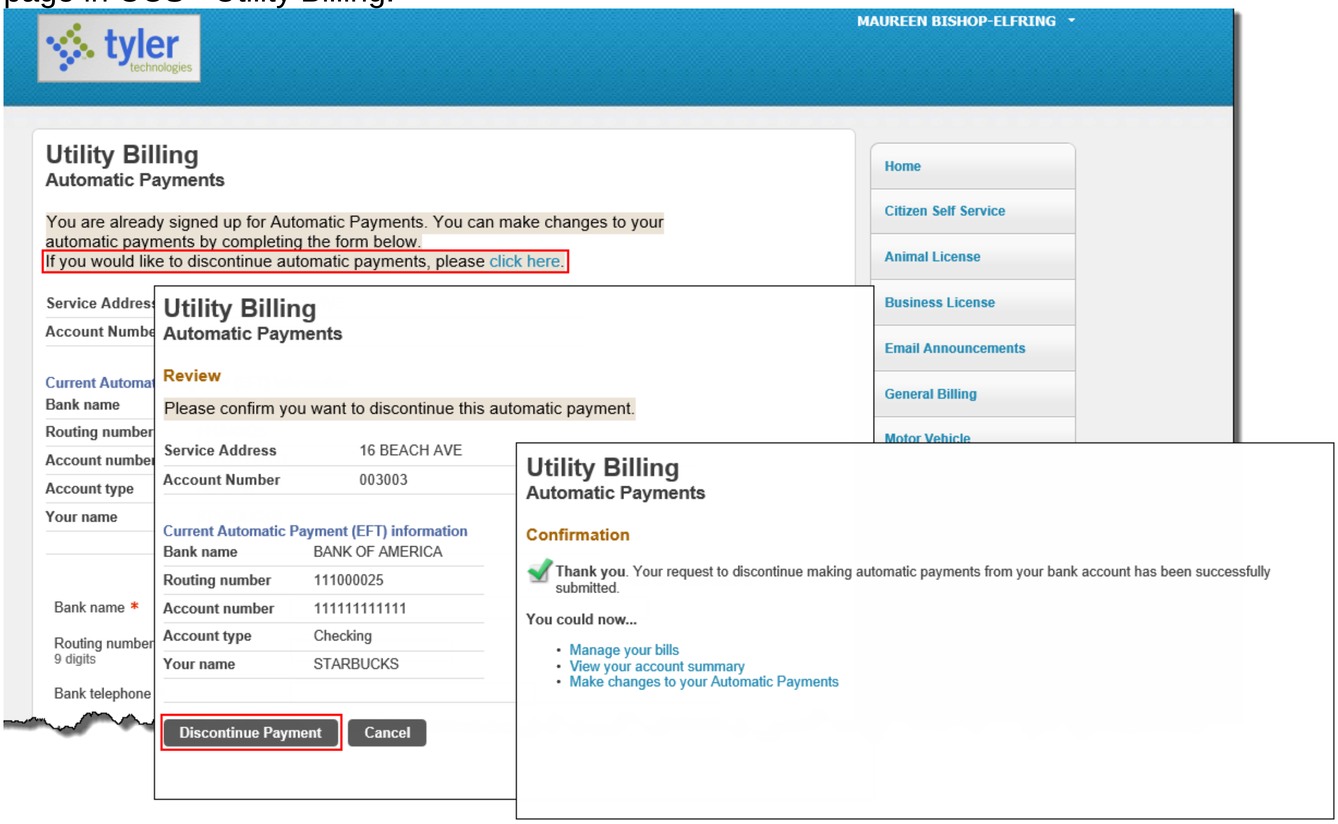
Business Licenses

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.



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.