



Munis Revenues

*Major Enhancements
Version 10.4 to 10.5*

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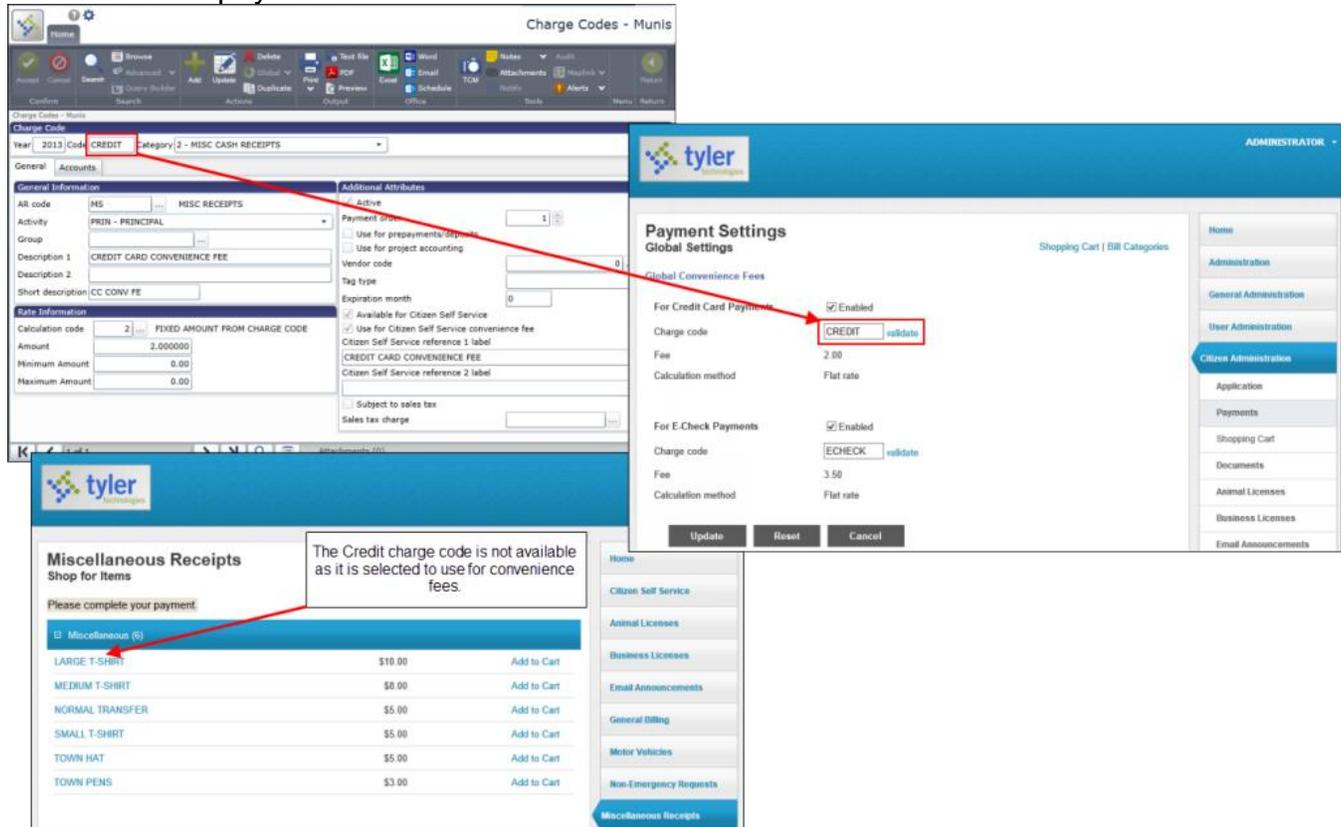
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Accounts Receivable Version 10.4

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.



Charge Codes - Munis

Year: 2013 | Code: CREDIT | Category: 2 - MISC CASH RECEIPTS

General Information

AR code: MS | MISC RECEIPTS
 Activity: PRIN - PRINCIPAL
 Group: |
 Description 1: CREDIT CARD CONVENIENCE FEE
 Description 2: |
 Short description: CC CONV FE

Additional Attributes

Payment type: 1
 Use for prepayments/credits
 Use for project accounting
 Vendor code: |
 Tag type: |
 Expiration month: 0
 Available for Citizen Self Service
 Use for Citizen Self Service convenience fee
 Citizen Self Service reference 1 label: CREDIT CARD CONVENIENCE FEE
 Citizen Self Service reference 2 label: |
 Subject to sales tax
 Sales tax charge: |

Global Convenience Fees

For Credit Card Payments: Enabled
 Charge code: CREDIT validate
 Fee: 2.00
 Calculation method: Flat rate

For E-Check Payments: Enabled
 Charge code: ECHECK validate
 Fee: 3.50
 Calculation method: Flat rate

Miscellaneous Receipts

Please complete your payment

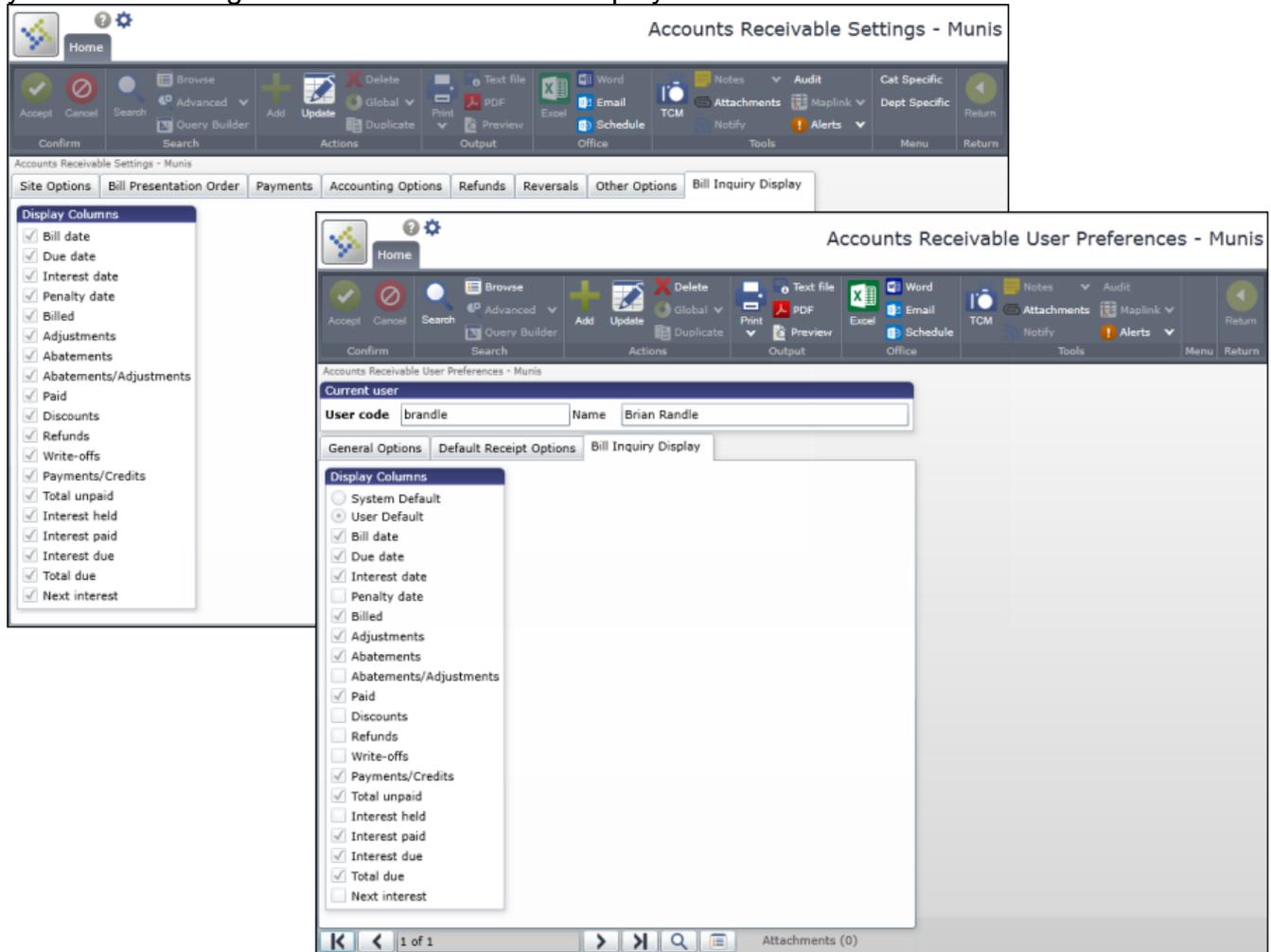
E: Miscellaneous (6)

LARGE T-SHIRT	\$10.00	Add to Cart
MEDIUM T-SHIRT	\$0.00	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

The Credit charge code is not available as it is selected to use for convenience fees.

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 is titled "Accounts Receivable Settings - Munis" and shows the "Bill Inquiry Display" tab. A "Display Columns" list on the left contains the following items, all of which are checked:

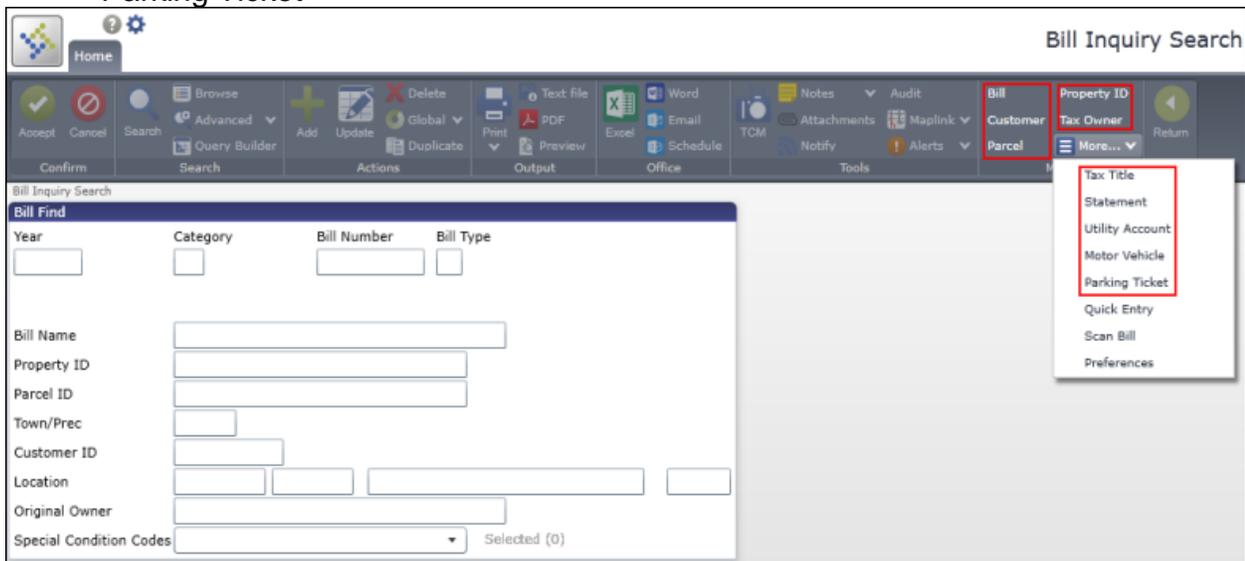
- Bill date
- Due date
- Interest date
- Penalty date
- Billed
- Adjustments
- Abatements
- Abatements/Adjustments
- Paid
- Discounts
- Refunds
- Write-offs
- Payments/Credits
- Total unpaid
- Interest held
- Interest paid
- Interest due
- Total due
- Next interest

The bottom screenshot is titled "Accounts Receivable User Preferences - Munis" and shows the "Bill Inquiry Display" tab for a specific user. The "Current user" section shows "User code" as "brandie" and "Name" as "Brian Randle". The "Display Columns" list on the left is identical to the one in the top screenshot, with all items checked.

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' interface. At the top right, the title 'Bill Inquiry Search' is displayed. Below the title bar is a ribbon with various tool icons. A dropdown menu is open, showing search options: 'Bill', 'Customer', 'Parcel', 'Property ID', 'Tax Owner', and 'More...'. The 'More...' option is selected, revealing a secondary dropdown menu with the following items: 'Tax Title', 'Statement', 'Utility Account', 'Motor Vehicle', 'Parking Ticket', 'Quick Entry', 'Scan Bill', and 'Preferences'. The main search area contains a 'Bill Find' section with input fields for 'Year', 'Category', 'Bill Number', and 'Bill Type'. Below this are several text input fields for 'Bill Name', 'Property ID', 'Parcel ID', 'Town/Prec', 'Customer ID', 'Location', 'Original Owner', and 'Special Condition Codes'.

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.

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 Muniis Miscellaneous Cash Payments Import interface. On the left, the 'Import criteria' section shows the entry date as 09/26/2013, clerk as 'brandie', and department as 'BLDG - BUILDING'. The 'Processing summary' table indicates 1 payment imported and 1 payment processed.

An inset window titled 'Misc Cash Import - Notepad' shows the import file content:


```

H201309232013FRITZ, MICHAEL 1
MS0000000187
DVITAL 0000020000<--REF1--><--REF2-->
G1000 4500 0000020000
    
```

 A red box highlights the line 'G1000 4500' and a red arrow points from a callout box 'Miscellaneous Cash Payments Import file' to this line.

The main 'Receipts - Muniis' screen shows the transaction details for a payment of 200.00. The 'Charge Allocation' table at the bottom shows the GL account override:

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

 A red arrow points from a callout box 'Receipts reflects the GL accounts used in the Miscellaneous Cash payment Import file.' to the '1000 4500' entry in this 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 Query Builder Add Update Delete Global Duplicate Print PDF Preview Excel Word Email Schedule Notes Audit Attachments Maplink Alerts 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"/>
	<input type="text" value="15"/> to <input type="text" value="15"/>	UB account status	<input type="text"/>
AR category range	<input type="text" value="1 - GENERAL BILLING"/>		
to	<input type="text" value="63 - UB SERVICES - ELECTRIC"/>		
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:

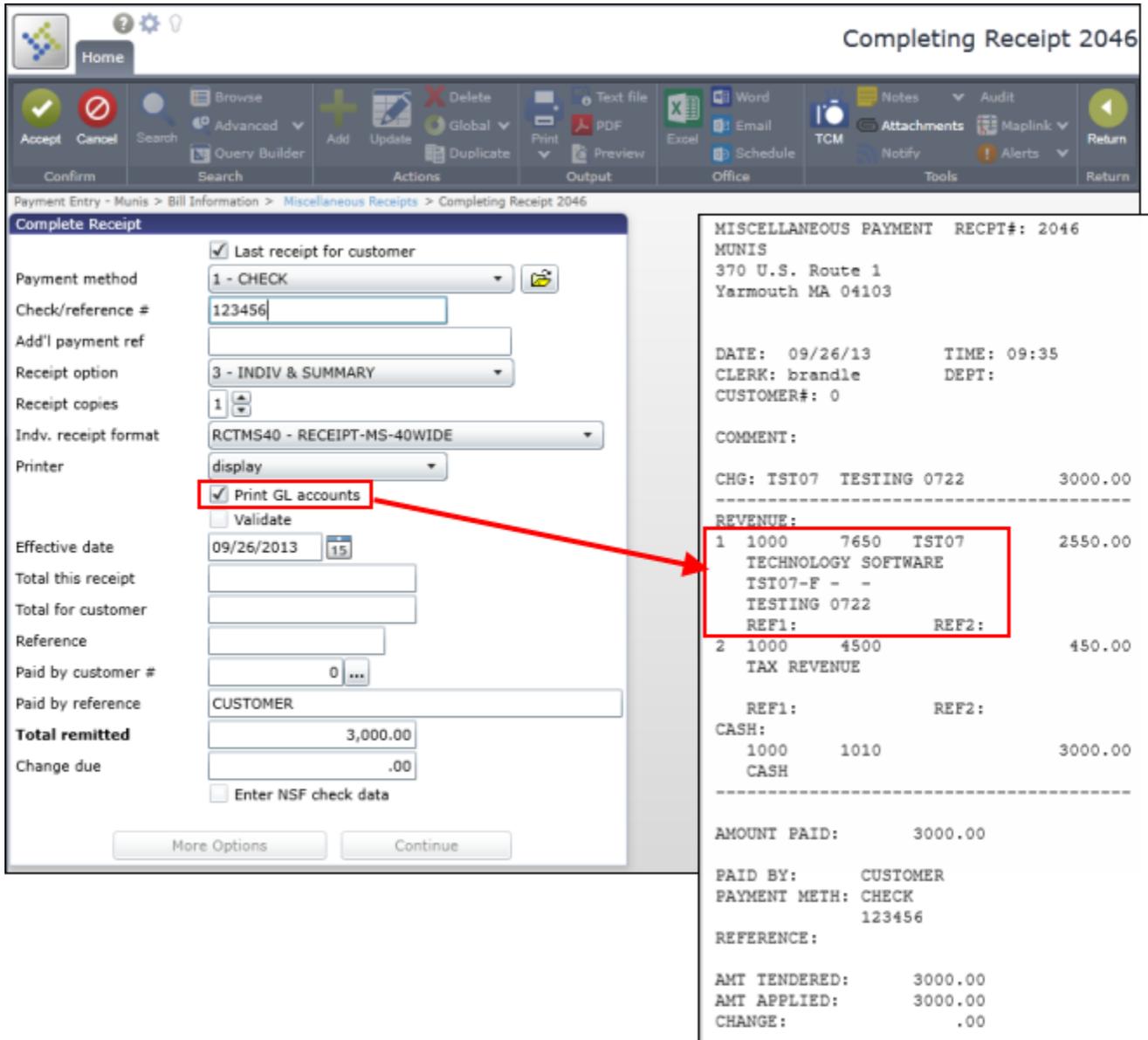
Records posted:

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: brandle DEPT:
CUSTOMER#: 0

COMMENT:

CHG: IST07 TESTING 0722 3000.00

REVENUE:

1	1000	7650	TSI07	2550.00
TECHNOLOGY SOFTWARE				
TSI07-F - -				
TESTING 0722				
REF1:		REF2:		
2	1000	4500		450.00
TAX REVENUE				
REF1:		REF2:		
CASH:				
1000	1010			3000.00
CASH				

AMOUNT PAID: 3000.00

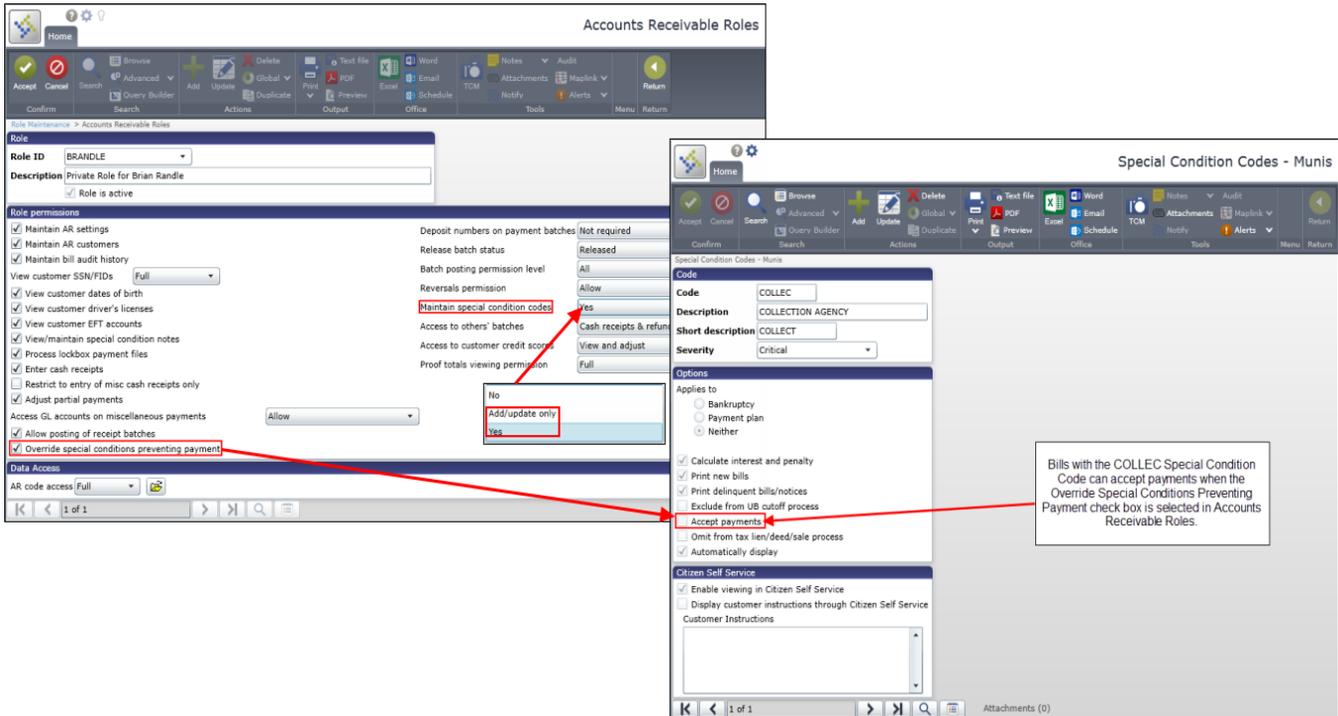
PAID BY: CUSTOMER
PAYMENT METH: CHECK
123456

REFERENCE:

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

Special Conditions

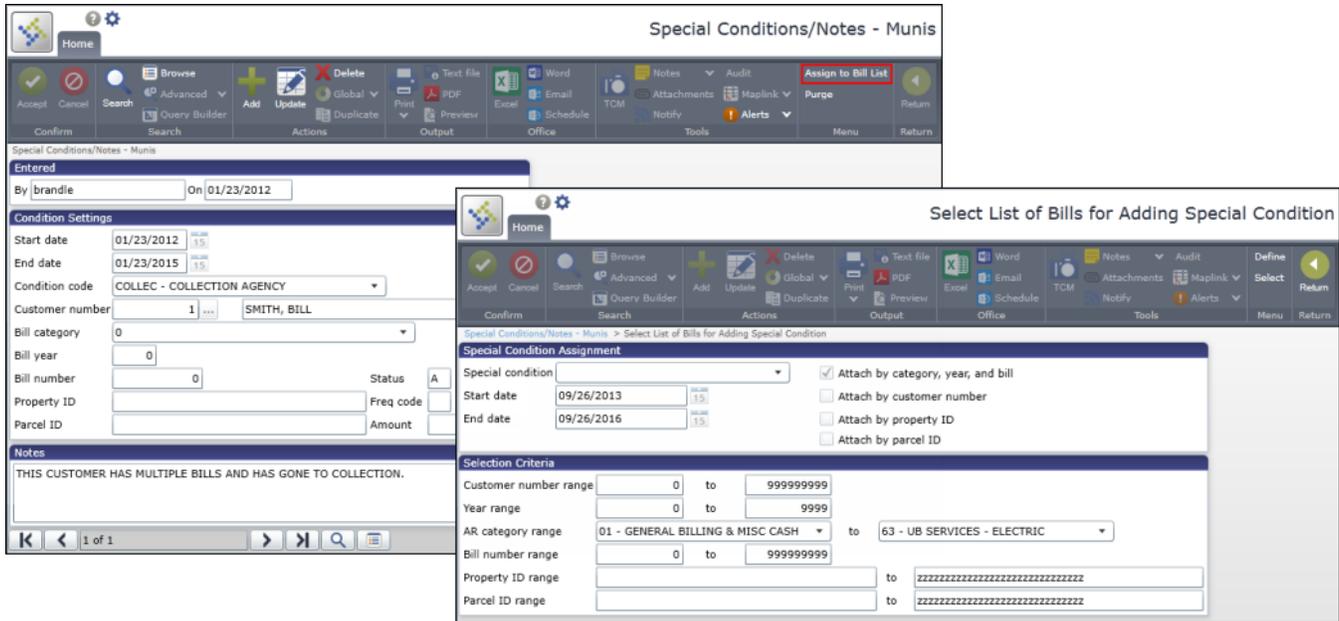
When the Override Special Conditions Preventing Payment check box is selected on the Account Receivables Roles screen of Roles and the Maintain Special Condition Codes list option selected is Yes or Add/Update Only, the Payment Entry program allows you to override the special conditions preventing payment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



The image shows two screenshots from the Tyler Technologies software. The left screenshot is the 'Accounts Receivable Roles' screen for Role ID 'BRANDLE'. In the 'Role permissions' section, the checkbox 'Override special conditions preventing payment' is checked and highlighted with a red box. A red arrow points from this checkbox to the 'Special Condition Codes - Munis' screen on the right. In the 'Special Condition Codes - Munis' screen, the 'Maintain special condition codes' dropdown is set to 'Yes' and highlighted with a red box. Another red arrow points from this dropdown to the 'Accept payments' checkbox in the 'Options' section, which is also checked and highlighted with a red box. A text box on the right side of the 'Special Condition Codes - Munis' screen contains the following text: '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.'

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

Scheduler

Selection criteria

Collection year:

Effective date: .15

Customer ID range: 0 to 99999999

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 .15 to .15

Output options

Order by: Zip code

Records per form:

Form code:

Update notice dates

Export as XML file

Include scanline

Results

Records selected:

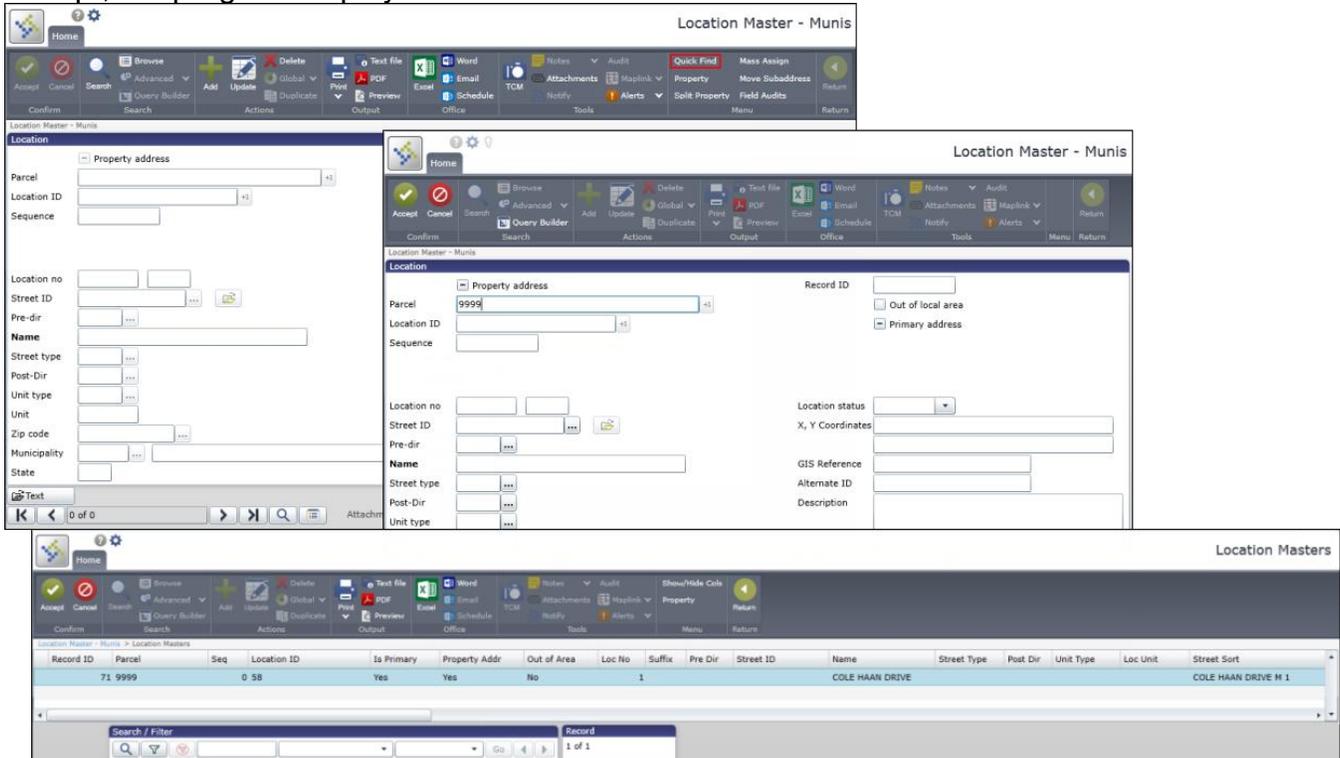
Records printed:

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.

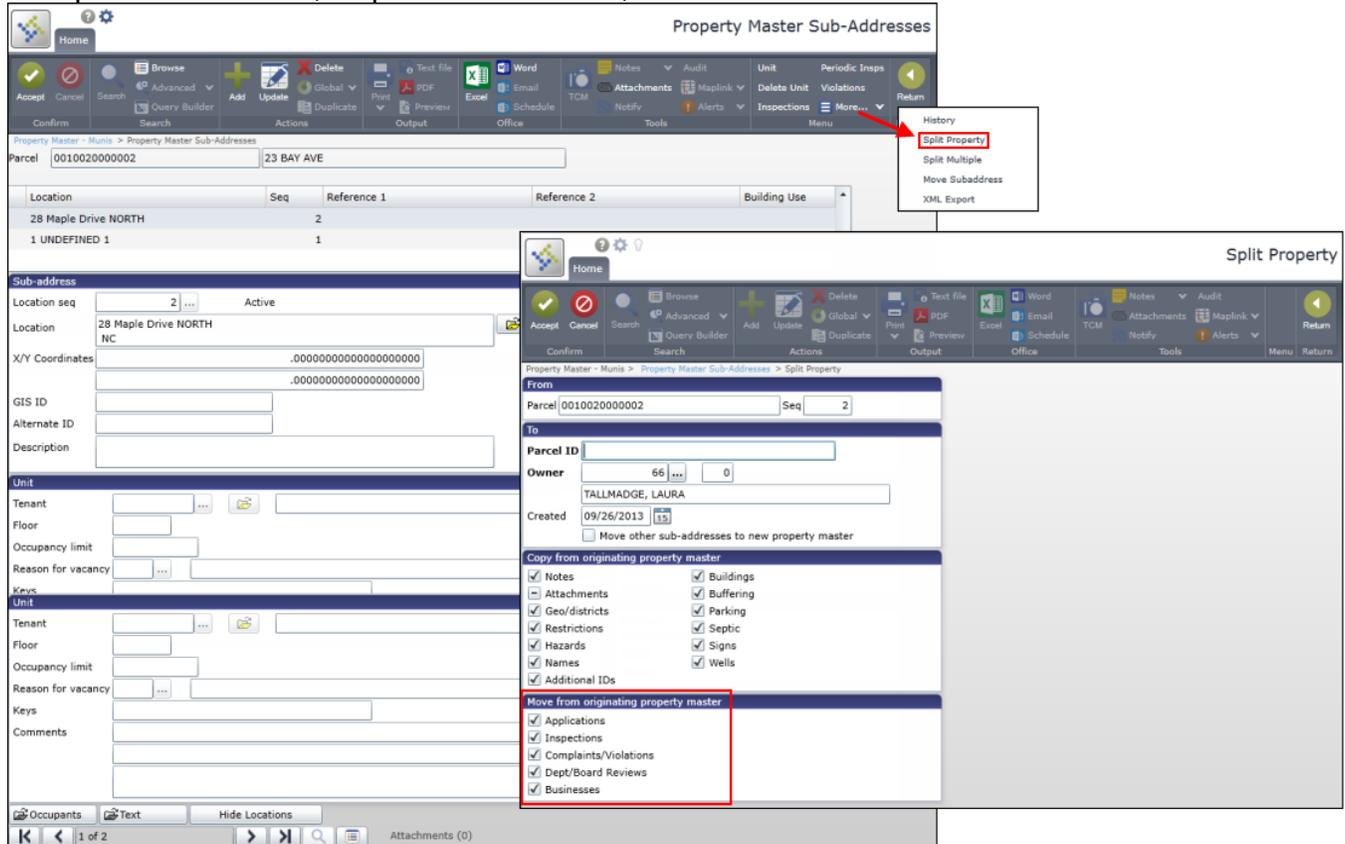


The screenshots illustrate the workflow from data entry to record browsing. The top two windows show the 'Location Master - Munis' form with fields for Parcel, Location ID, Sequence, Location no, Street ID, Pre-dir, Name, Street type, Post-Dir, Unit type, Unit, Zip code, Municipality, and State. The bottom window shows the 'Location Masters' table 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
71	9999	0	58	Yes	Yes	No	1				COLE HAAN DRIVE					COLE HAAN DRIVE H 1

Property Master

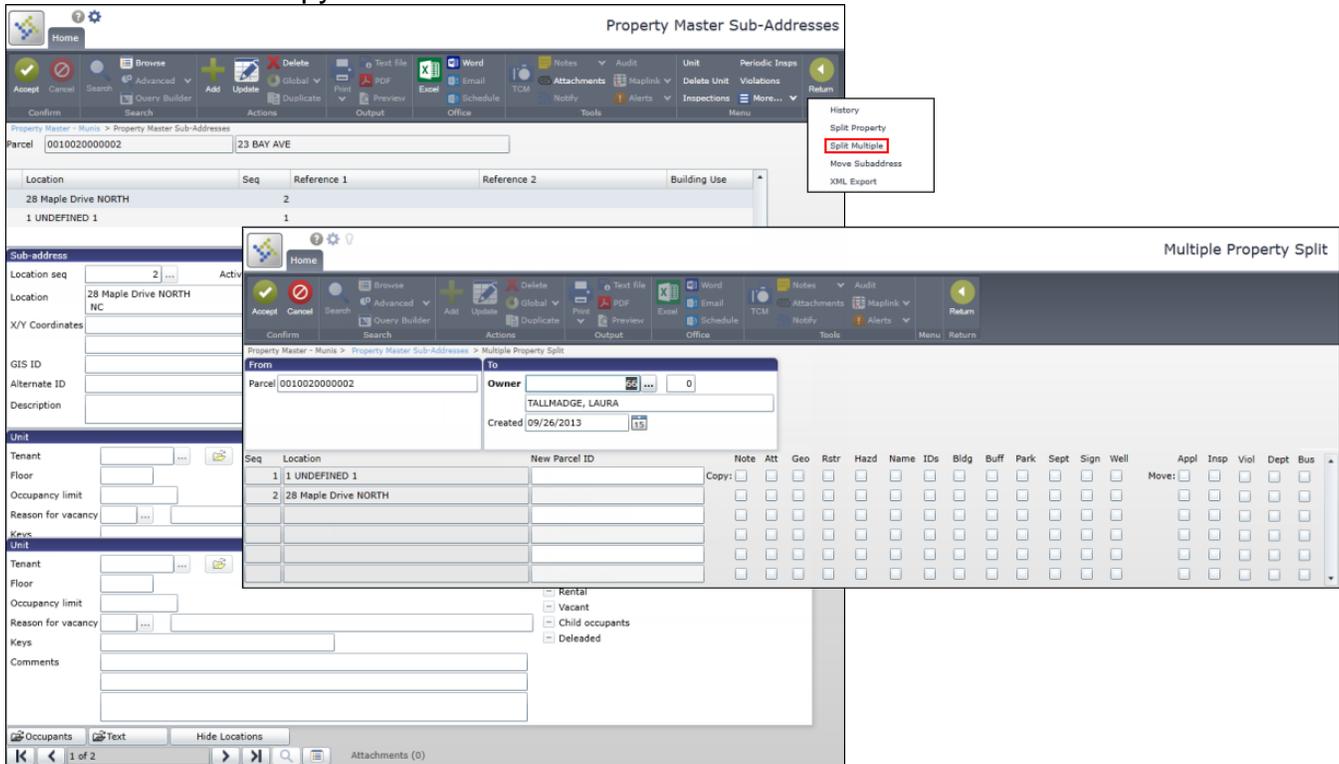
When you click the Split Property button on the Sub-Addresses screen of Property Master, the Move from Originating Property Master group includes the Applications, Inspections, Complaints/Violations, Dept/Board Reviews, and Businesses check boxes.



The image shows two screenshots from the Property Master software interface. The top screenshot is the 'Property Master Sub-Addresses' screen. It features a toolbar with various actions like 'Accept', 'Cancel', 'Search', 'Advanced', 'Add', 'Update', 'Delete', 'Global', 'Print', 'PDF', 'Excel', 'Word', 'Notes', 'Attachments', 'Maplink', 'Unit', 'Periodic Insps', 'Delete Unit', 'Violations', 'Inspections', and 'More...'. A red arrow points to the 'More...' dropdown menu, which is open, showing options: 'History', 'Split Property', 'Split Multiple', 'Move Subaddress', and 'XML Export'. The 'Split Property' option is highlighted with a red box.

The bottom screenshot is the 'Split Property' dialog box. It shows the 'From' and 'To' information, including 'Parcel ID' (001002000002) and 'Seq' (2). The 'Owner' is listed as 'TALLMADGE, LAURA'. Below this, there are two sections for copying data from the originating property master. The first section, 'Copy from originating property master', includes checkboxes for: Notes, Attachments, Geo/districts, Restrictions, Hazards, Names, Additional IDs, Buildings, Buffering, Parking, Septic, Signs, and Wells. The second section, 'Move from originating property master', includes checkboxes for: Applications, Inspections, Complaints/Violations, Dept/Board Reviews, and Businesses. This second section is highlighted with a red box.

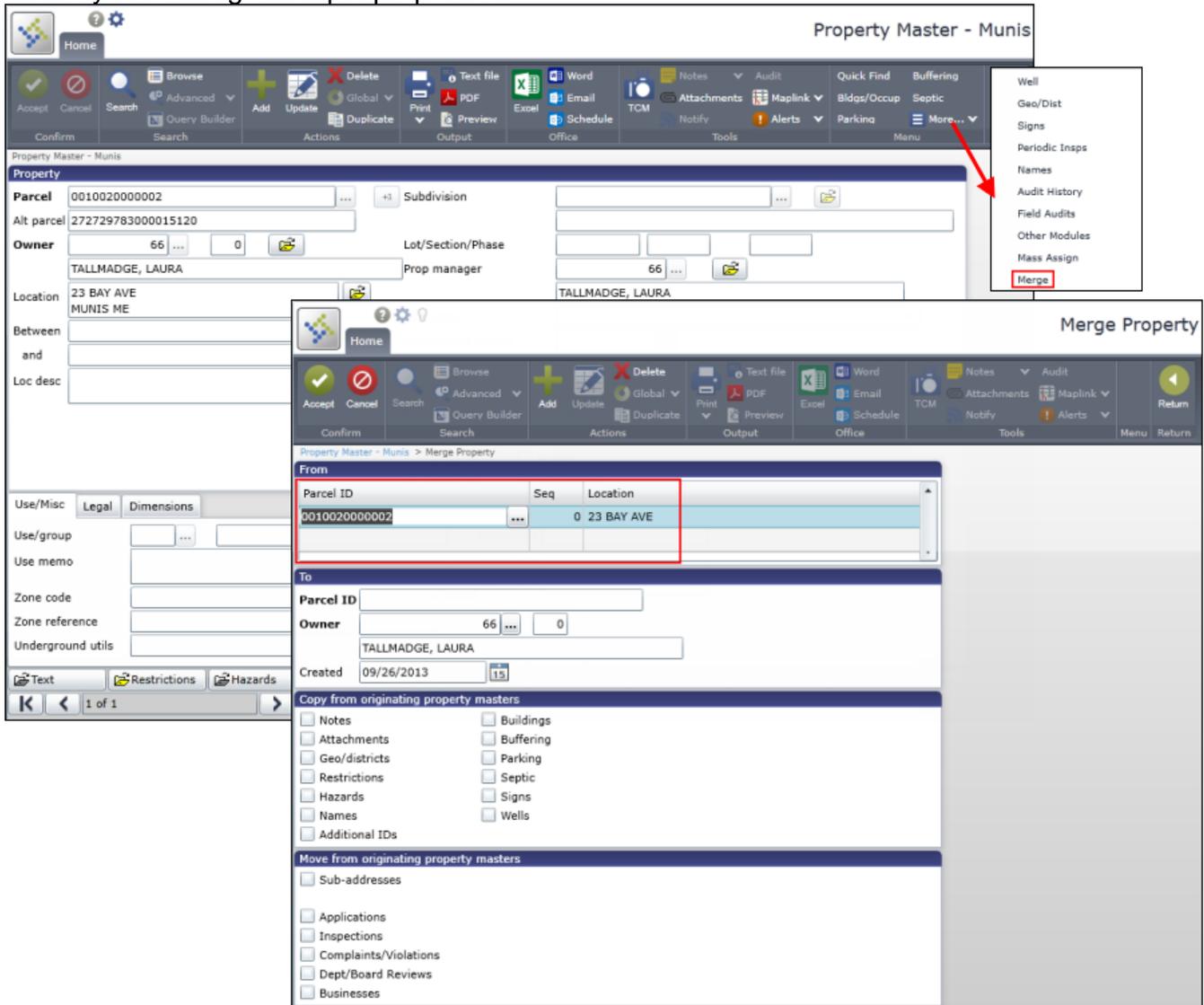
When you click the Split Multiples button on the Sub-Addresses screen of Property Master, the Multiple Property screen allows you to enter the From and To properties and to select the individual items to copy or move.



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 'Split Multiple' button, which is highlighted with a red box. The bottom screenshot is the 'Multiple Property Split' screen, which is used for defining the 'From' and 'To' properties and selecting items to copy or move. The 'From' property is set to parcel 001002000002, and the 'To' property is set to 'TALLMADGE, LAURA'. A table below shows the selection of items to be split.

Seq	Location	New Parcel ID	Copy:	Note	Att	Geo	Rstr	Hazd	Name	IDs	Blgd	Buff	Park	Sept	Sign	Well	Move:	Appl	Insp	Viol	Dept	Bus
1	1 UNDEFINED 1		<input type="checkbox"/>														<input type="checkbox"/>					
2	28 Maple Drive NORTH		<input type="checkbox"/>														<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 screenshot displays two overlapping windows from the 'Property Master - Munis' application. The top window shows the 'Property Master' form with a 'More...' menu open, where the 'Merge' option is highlighted with a red box and a red arrow. The bottom window shows the 'Merge Property' screen, which includes a table for selecting properties to merge.

Property Master - Munis

Property

Parcel: 001002000002

Alt parcel: 272729783000015120

Owner: TALLMADGE, LAURA

Location: 23 BAY AVE, MUNIS ME

Merge Property

From

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

To

Parcel ID: []

Owner: TALLMADGE, LAURA

Created: 09/26/2013

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

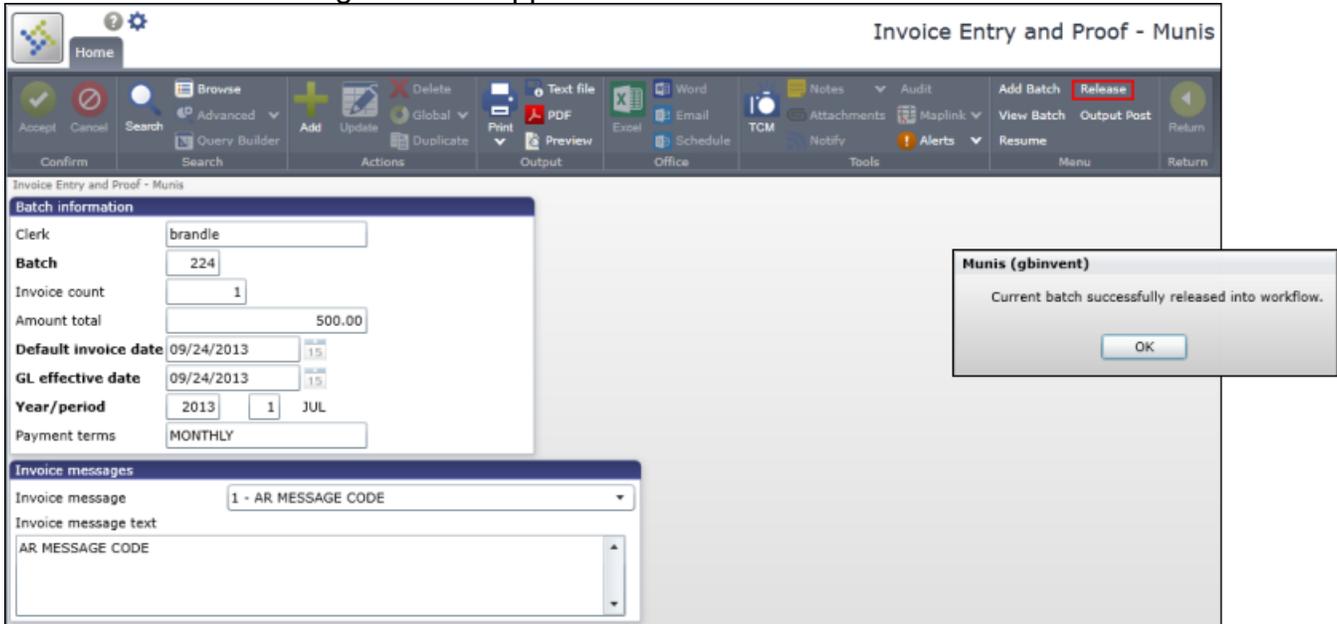
- Sub-addresses
- Applications
- Inspections
- Complaints/Violations
- Dept/Board Reviews
- Businesses

General Billing Enhancements Version 10.4

The following changes apply to Munis General Billing programs.

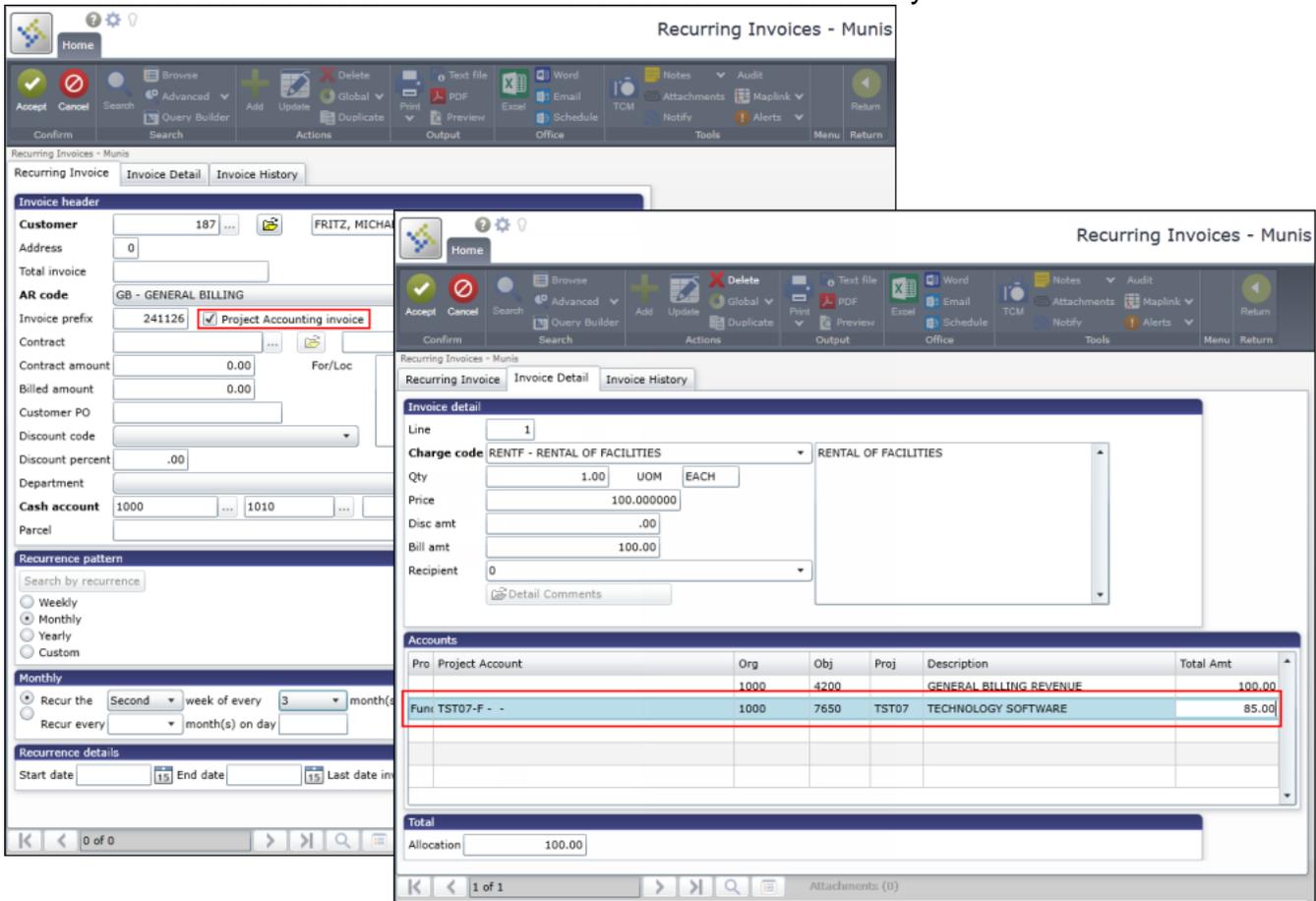
Invoice Entry and Proof

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 'Project Accounting invoice' checkbox checked in the 'Invoice header' section. The right screenshot shows the 'Invoice detail' section with the following table of accounts:

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

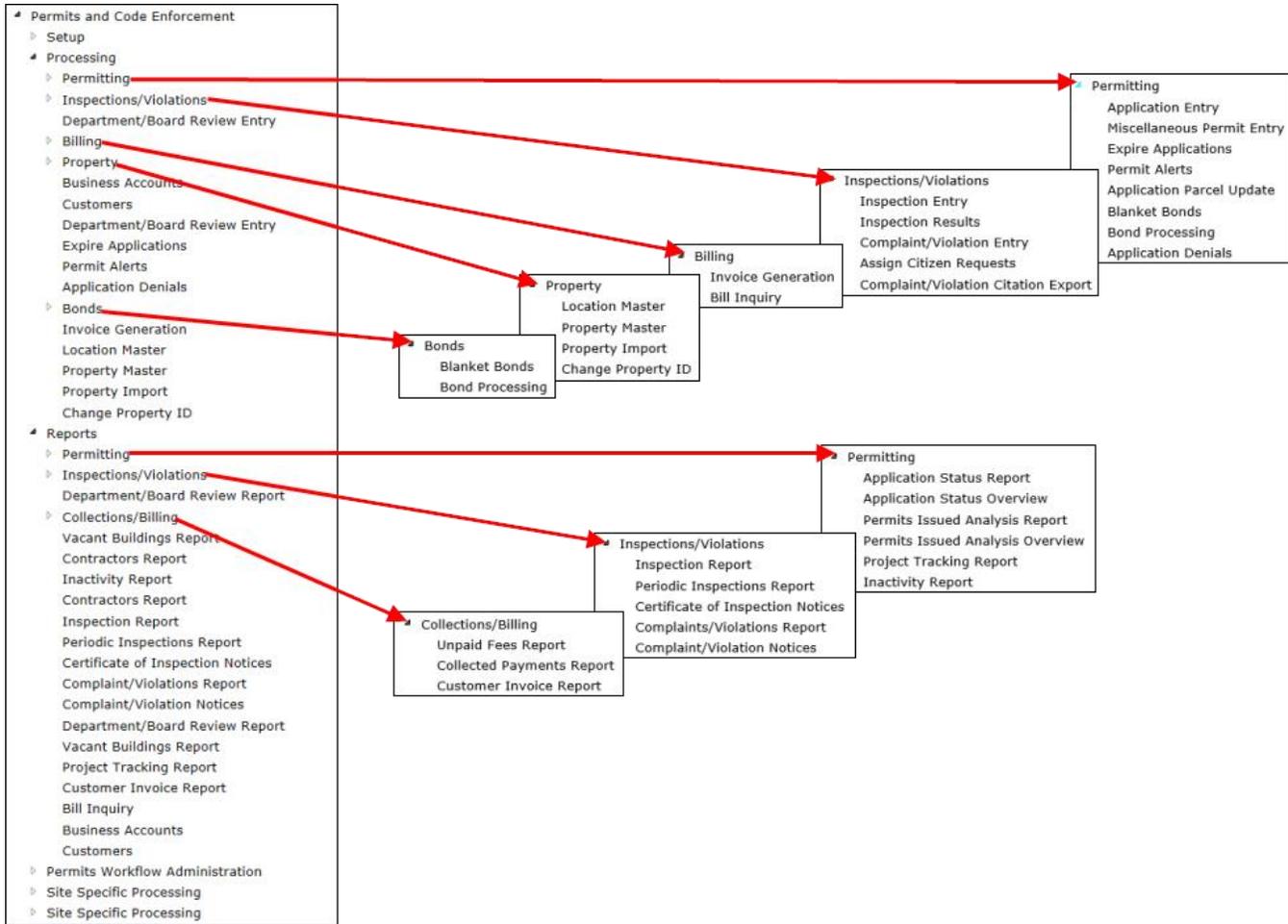
Permits and Code Enforcement Version 10.4

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 | Audit | Detail | Collect | Return

Confirm | Query Builder | Actions | Duplicate | Output | Office | Attachments | Maplink | Overview | Close/Deny | More... | Menu

Application Entry - Munis

Application

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:

Quick Find

Home | Accept | Cancel | Search | Advanced | Add | Update | Global | Delete | Text file | Word | Notes | Audit | Detail | Collect | Return

Confirm | Query Builder | Actions | Duplicate | Output | Office | Attachments | Maplink | Overview | Close/Deny | More... | Menu

Application Entry - Munis > Quick Find

Find

Application:

Location:

Street:

Unit:

Parcel: Seq: Primary address:

Municipality:

Application status:

Department:

Project/Activity:

Owner:

Contractor:

Subdivision:

Lot:

Proposed use:

Proposed zone:

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 | Audit | Show/Hide Cols | Overview | Return

Confirm | Query Builder | Actions | Duplicate | Output | Office | Attachments | Maplink | Overview | Close/Deny | More... | Menu

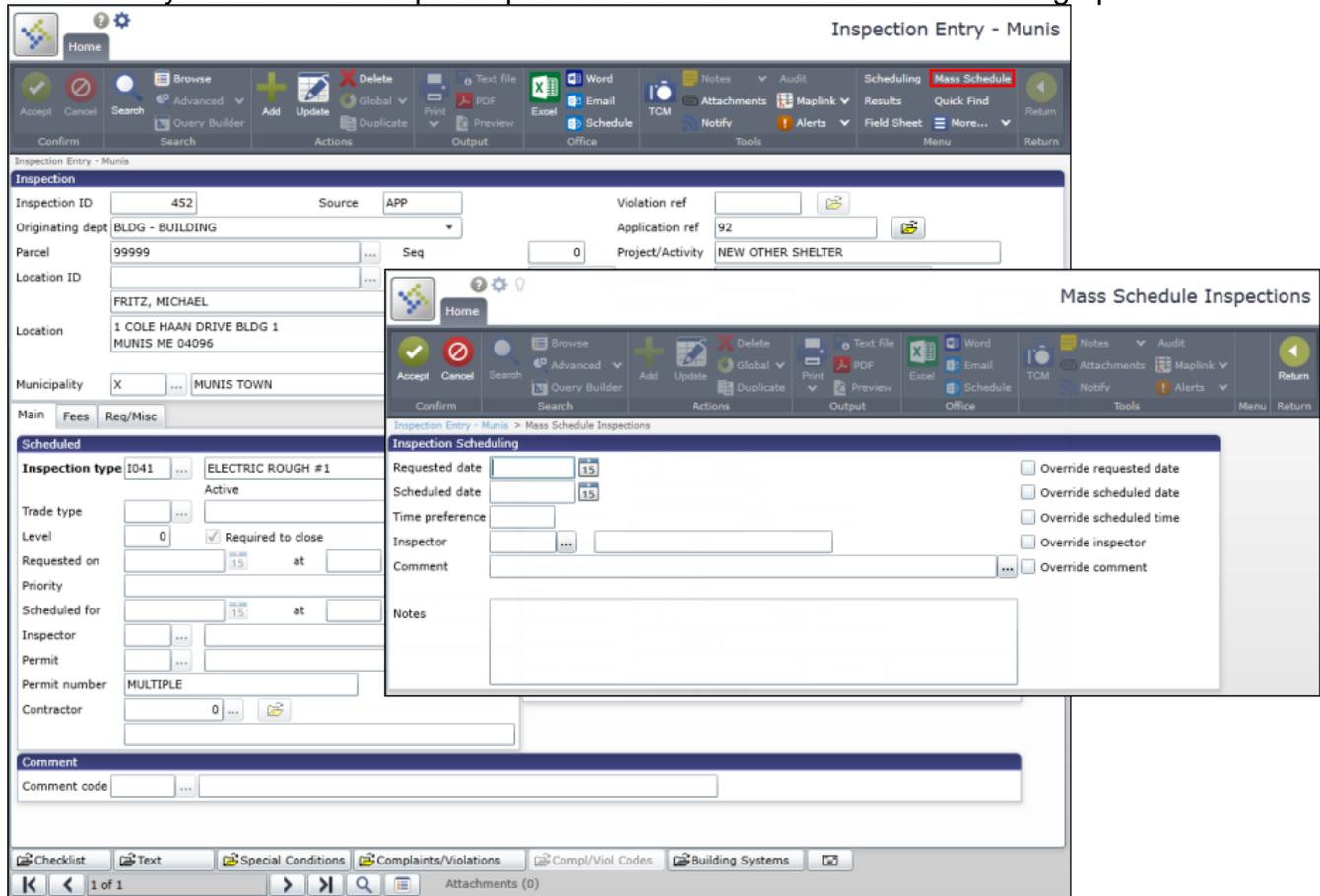
Application Entry - Munis > Applications

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: 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.



The screenshot displays the 'Inspection Entry - Munis' application interface. The top navigation bar includes a 'Home' button and a 'Mass Schedule' button highlighted in red. Below the navigation bar, the 'Inspection' section contains fields for Inspection ID (452), Source (APP), Violation ref, Application ref (92), Parcel (99999), Seq (0), Project/Activity (NEW OTHER SHELTER), Location ID, Location (FRITZ, MICHAEL, 1 COLE HAAN DRIVE BLDG 1, MUNIS ME 04096), and Municipality (MUNIS TOWN).

The 'Mass Schedule Inspections' window is overlaid on the main screen. It features a toolbar with 'Accept', 'Cancel', 'Search', 'Advanced', 'Add', 'Update', 'Global', 'Print', 'PDF', 'Excel', 'Word', 'Email', 'TCM', 'Attachments', 'Maplink', 'Notify', 'Alerts', and 'Return' buttons. The 'Inspection Scheduling' section includes fields for Requested date, Scheduled date, Time preference, Inspector, and Comment. There are also checkboxes for 'Override requested date', 'Override scheduled date', 'Override scheduled time', 'Override inspector', and 'Override comment'. A 'Notes' text area is located below the scheduling fields.

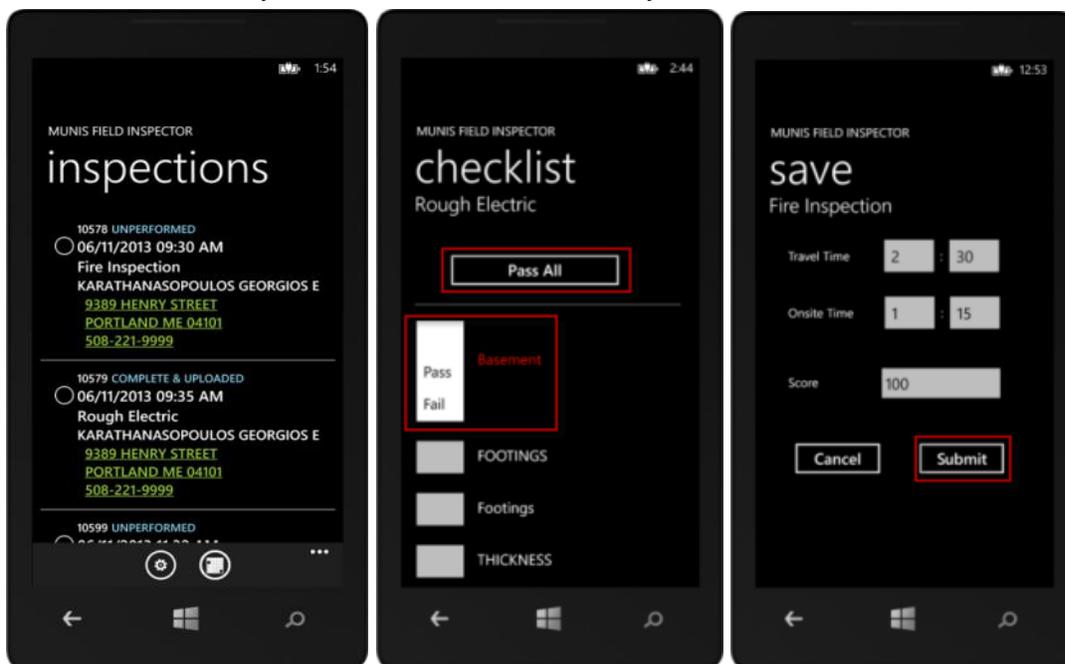
The 'Scheduled' section shows 'Inspection type' (1041 - ELECTRIC ROUGH #1), 'Trade type' (Active), 'Level' (0), 'Required to close' (checked), 'Requested on' (15), 'Priority', 'Scheduled for' (15), 'Inspector', 'Permit', 'Permit number' (MULTIPLE), and 'Contractor' (0).

The 'Comment' section has a 'Comment code' field. At the bottom, there are tabs for 'Checklist', 'Text', 'Special Conditions', 'Complaints/Violations', 'Compl/Viol Codes', and 'Building Systems'. The status bar at the bottom indicates '1 of 1' and 'Attachments (0)'.

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.

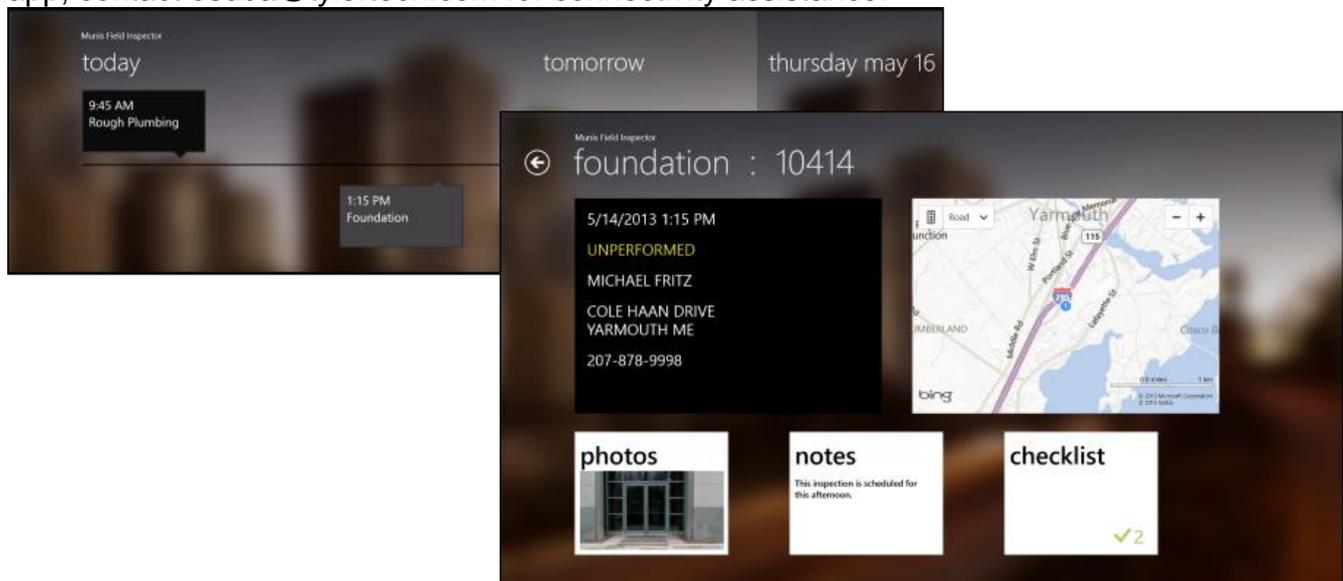


Please refer to the [Munis Field Inspector Application – Windows 8 Phones](#) document in the Munis KnowledgeBase for more information about the application.

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.



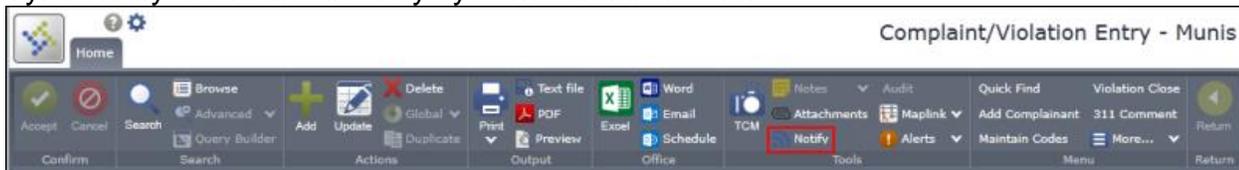
Please refer to the [Munis Field Inspector Application – Windows 8 Tablet](#) document in the Munis KnowledgeBase for more information about the application.

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

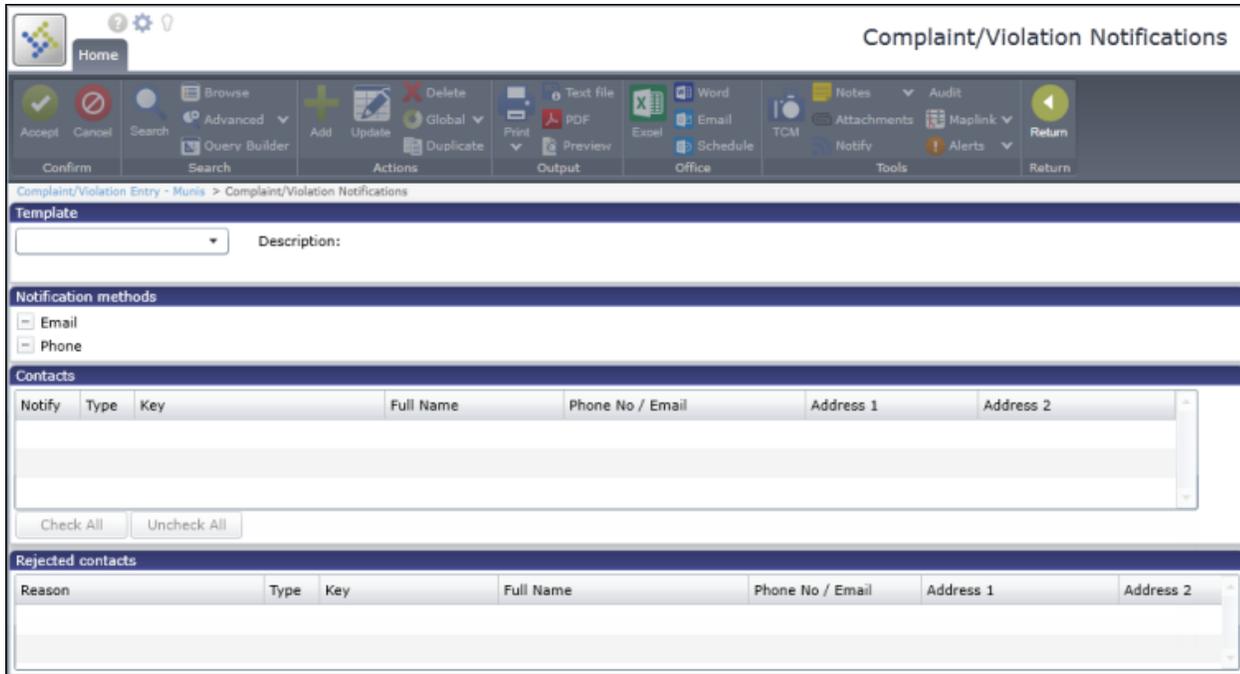
Munis is integrated with Tyler Notify to provide automated electronic notifications through telephone calls or emails. This feature requires that you purchase and install Tyler Notify. Once installed, the connection to Tyler Notify must be configured by entering the Tyler Notify base URL and Tyler Notify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



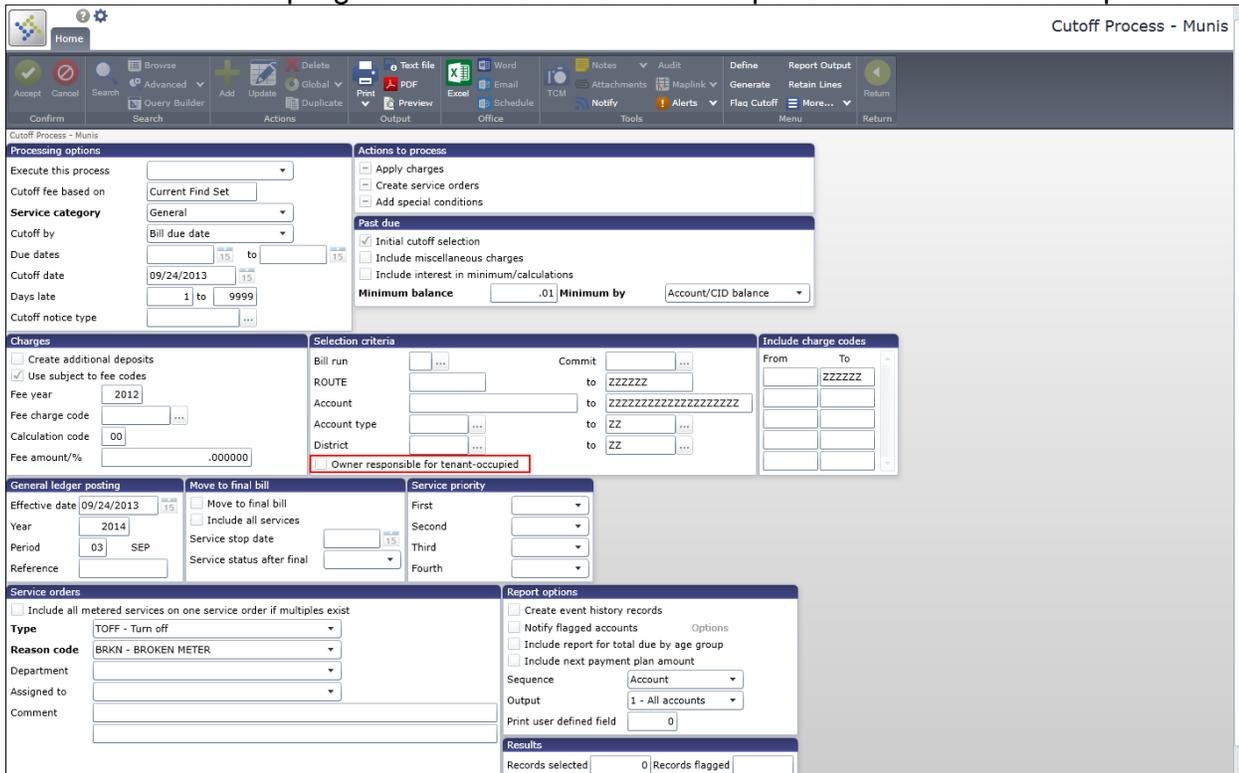
Utility Billing – CIS Version 10.4

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



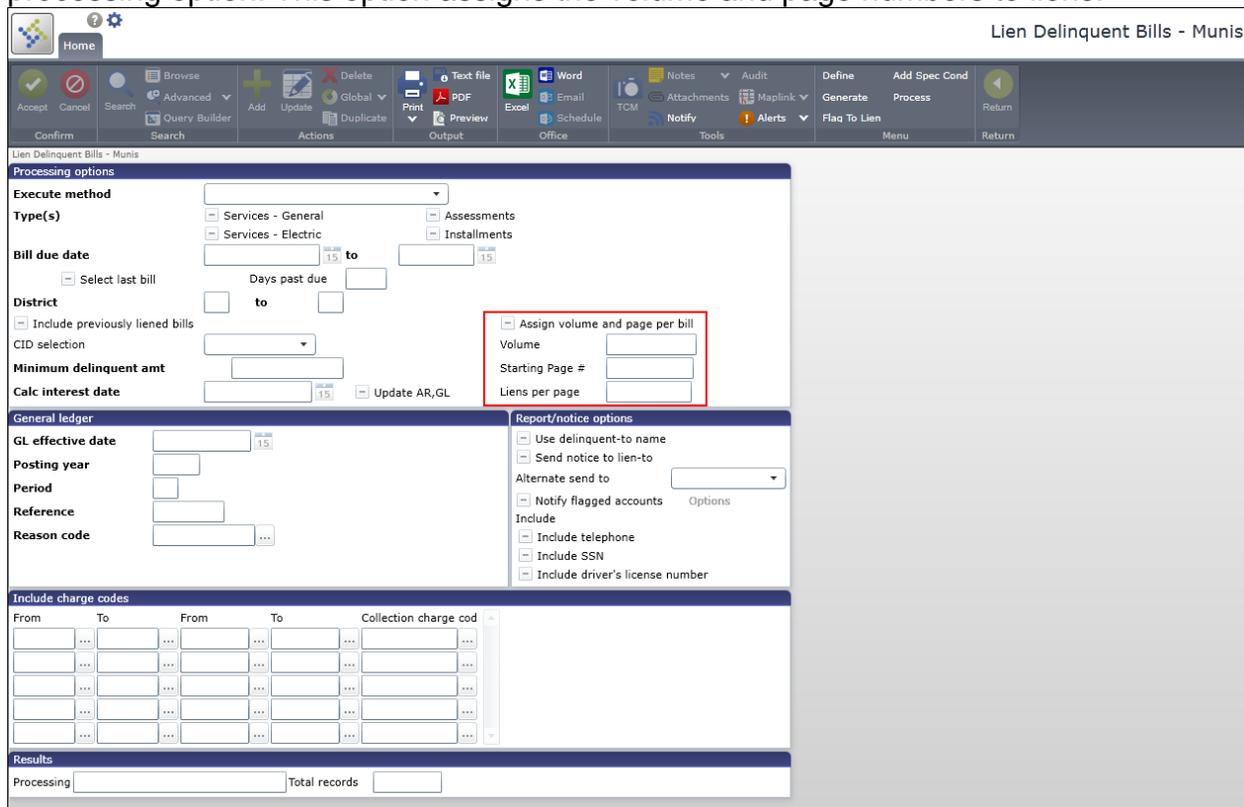
If selected, this check box restricts the Fee Charge Code value to calc code 60–Flat Amount and when the process completes, one of the following results:

- 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' application window. The 'Processing options' section is expanded, and the 'Assign volume and page per bill' checkbox is checked and highlighted with a red box. Below this checkbox are three input fields: 'Volume', 'Starting Page #', and 'Liens per page'. Other sections visible include '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.

Account Event History - Munis

Home

Accept Cancel Search Advanced Query Builder Add Update Duplicate Print PDF Preview Excel Word Attachments Notes Audit Report Options History Misc Charge Return

Confirm Search Actions Output Office Tools Alerts Menu Return

Account Event History - Munis

Event

Account []

Event type []

Effective date [] Sequence []

Customer [] Address # []

Reference []

Service order [] SO sequence []

Run/Commit []

AR category []

Year [] Bill [] Multiple bills []

Charge code []

Meter manufacturer [] Meter # []

Quantity [] Amount [] Receipt []

Reason [] Volume [] Page []

Action []

Form used []

Comment(s) []

Created by [] Entered [] Time []

K < 0 of 0 > Attachments (0)

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.

Identify Buffer Polygon Search Location Distance Area Layers Background Quick Zoom Launch Munis Set Defaults Clear Set Return

Query Geographic Tools Map Application

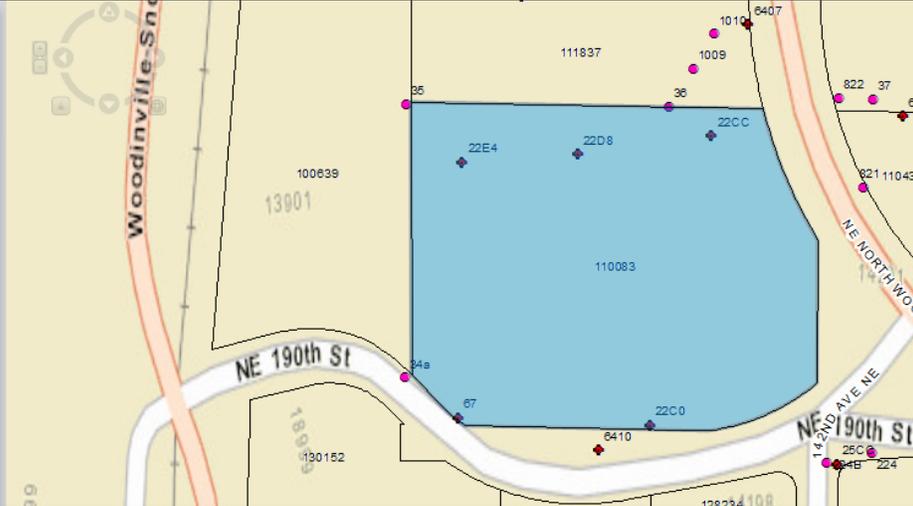
Query Results

Active Set

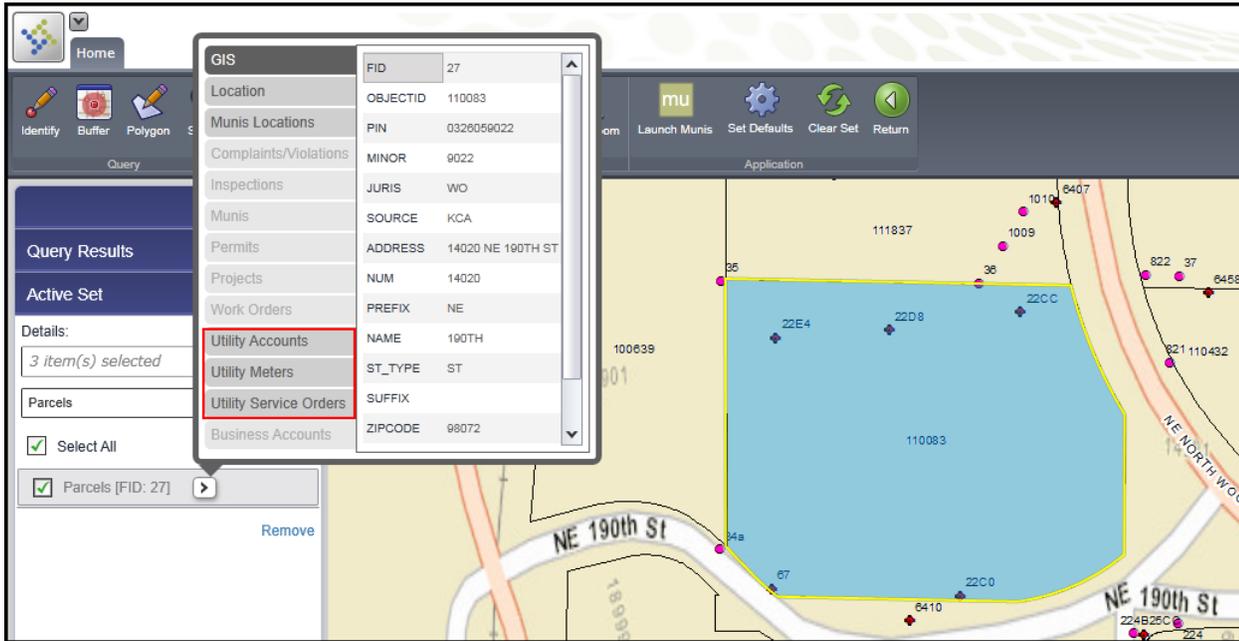
Details:

Clear

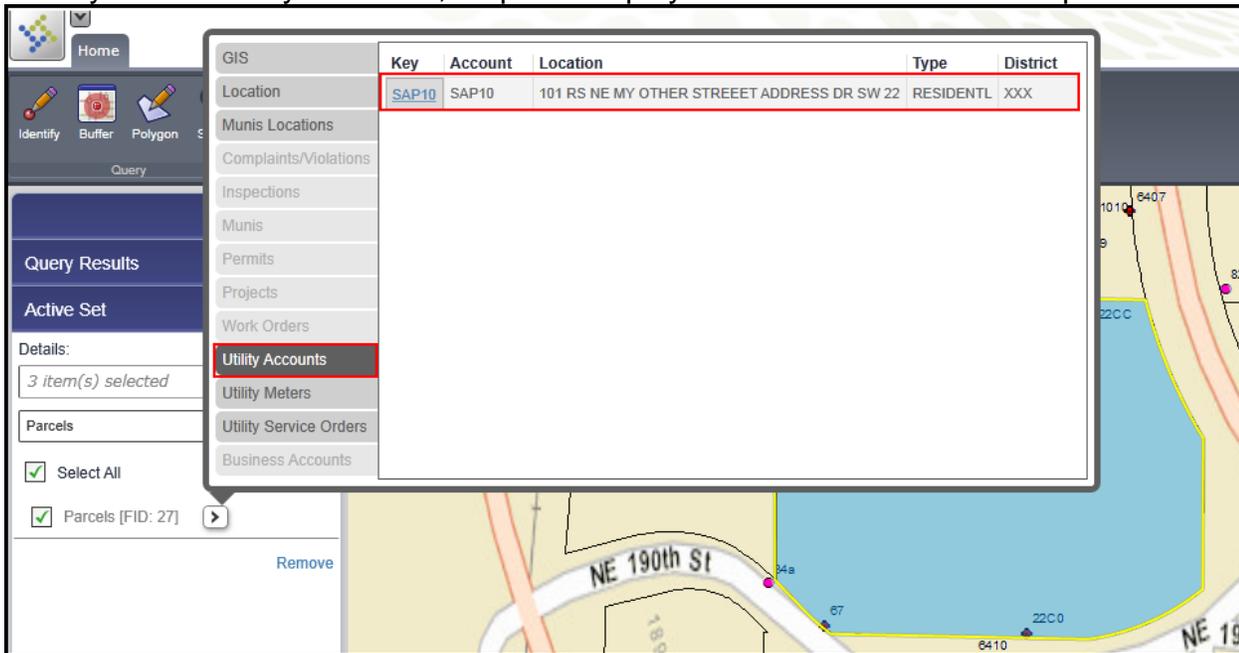
- Asset Information
- Business Accounts
- Complaints/Violations
- Inspections
- Permits
- Projects
- Utility Accounts
- Utility Meters
- Utility Service Orders
- Work Orders



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.

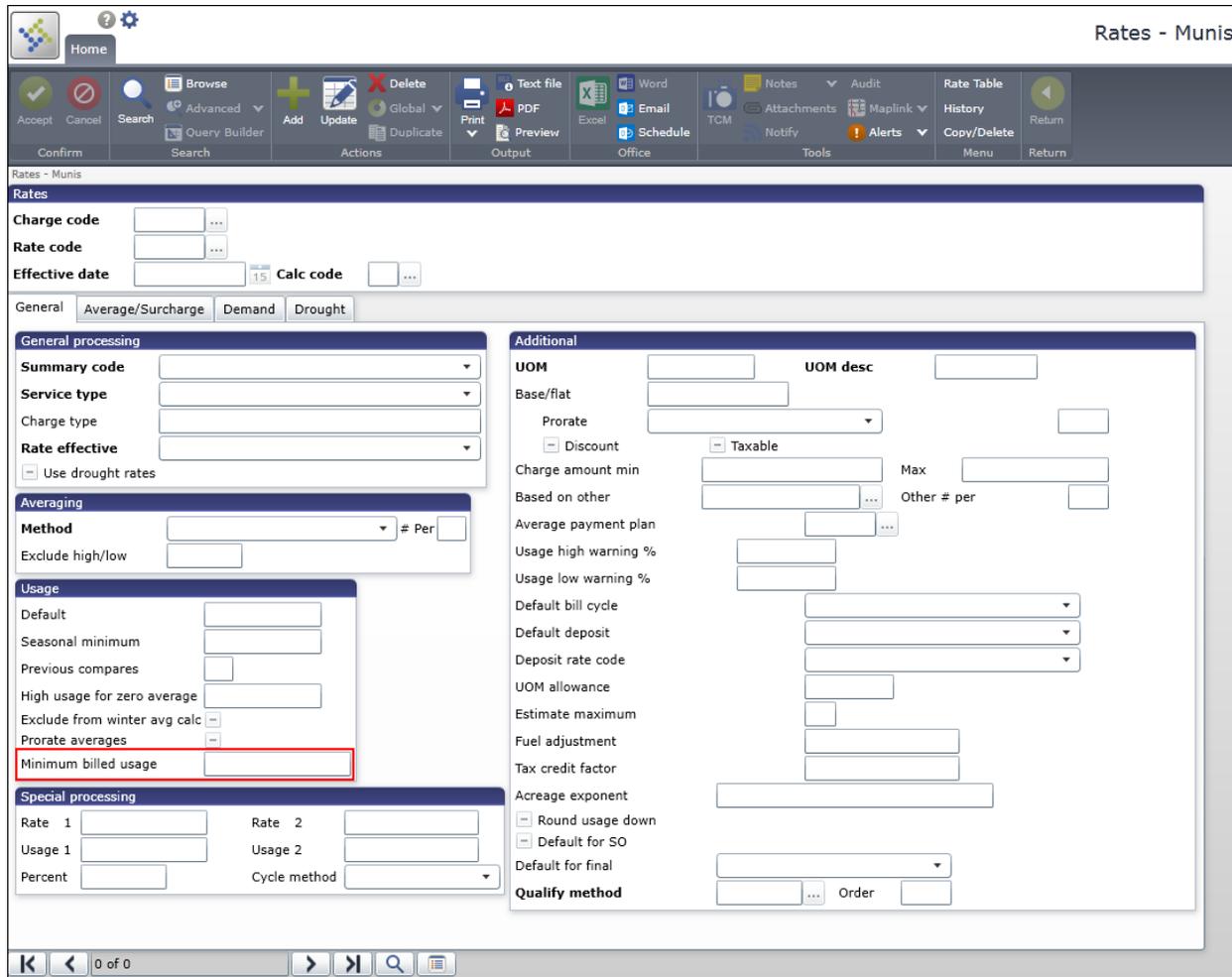


Clicking the Key hyperlink opens the Utilities program with the associated account as the active record.

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 'General' tab is selected, and the 'Additional' section is expanded. In the 'Additional' section, the 'Minimum billed usage' field is highlighted with a red border. Other fields include 'UOM', 'Base/flat', 'Prorate', 'Discount', 'Taxable', 'Charge amount min', 'Max', 'Based on other', 'Other # per', 'Average payment plan', 'Usage high warning %', 'Usage low warning %', 'Default bill cycle', 'Default deposit', 'Deposit rate code', 'UOM allowance', 'Estimate maximum', 'Fuel adjustment', 'Tax credit factor', 'Acreeage exponent', 'Round usage down', 'Default for SO', 'Default for final', and 'Qualify method'.

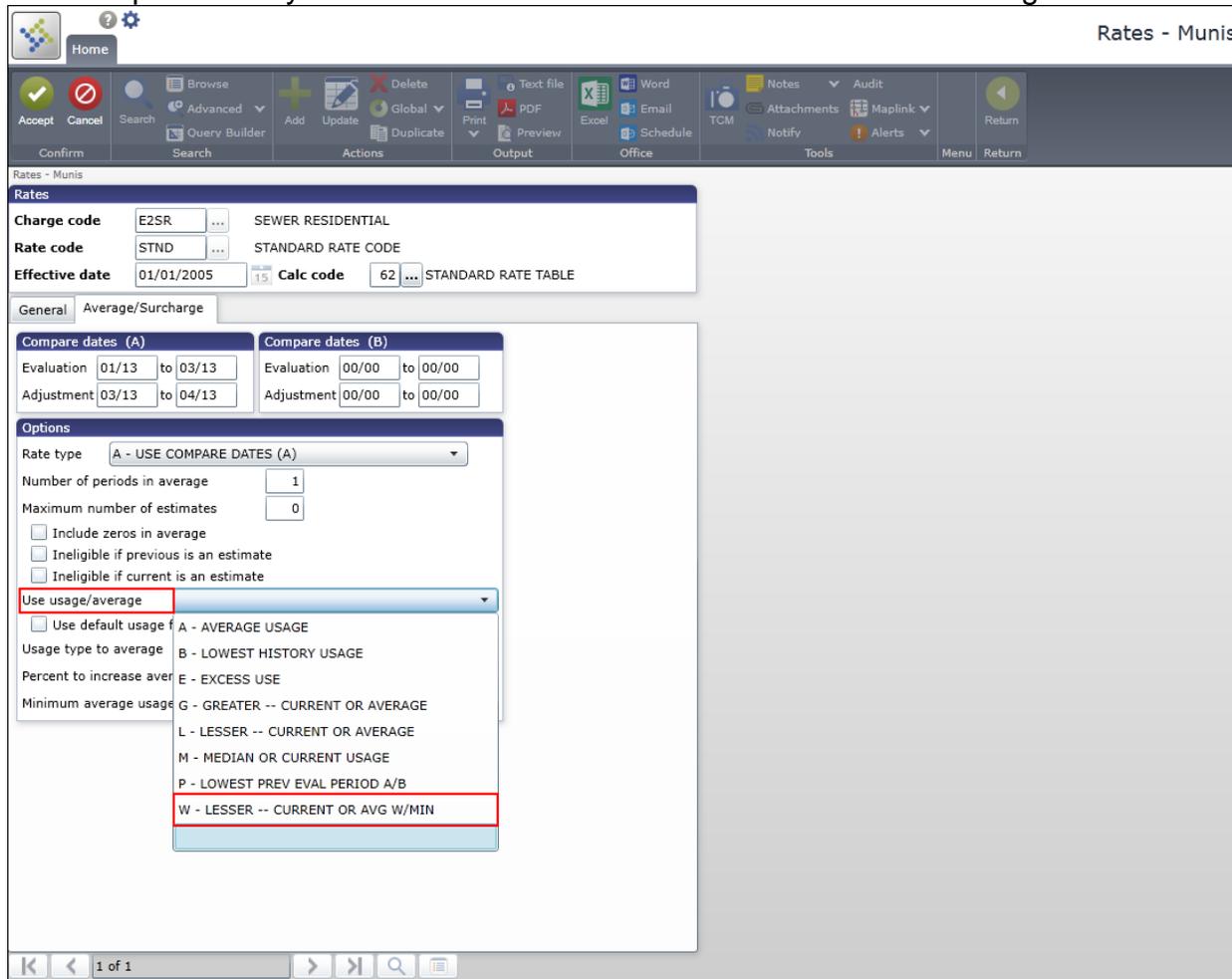
The Calculate Charges and Bill Adjustments programs are updated so that when billed usage is determined, the usage minimum from the Rate Masters program is evaluated against the actual usage and replaces the actual usage as the billed usage when it is less. The comparison of actual usage to a usage minimum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

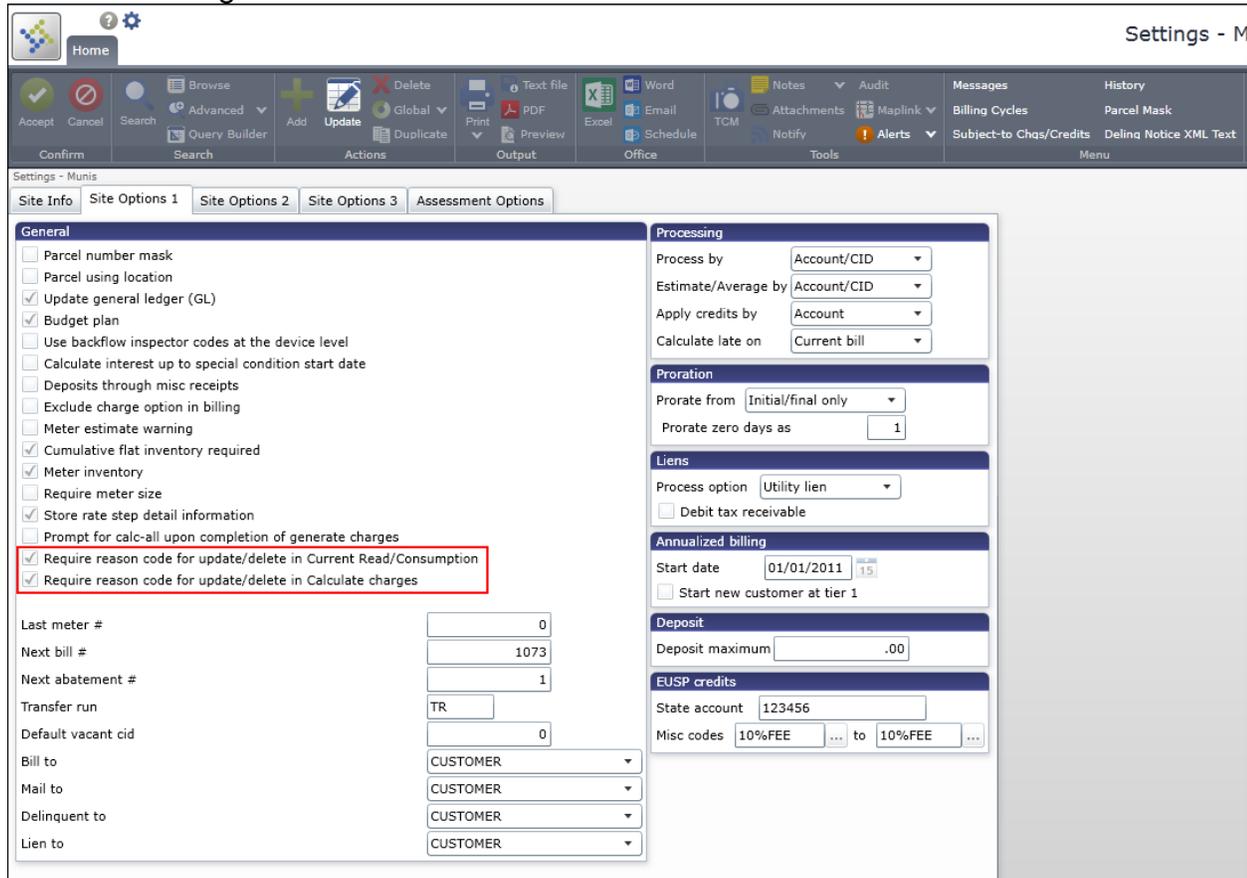
For winter quarter sewer calculations, the Rate Masters program includes the W-Lesser--Current or Avg w/Min field value option for the Use Usage/Average list on the Average/Surcharge tab. This calculation is based on the lesser of the current or average usage from the prior fiscal year if the account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



The screenshot shows the 'Settings - Munis' application window. The 'Site Options 1' tab is active. The 'General' section contains the following checked items:

- Update general ledger (GL)
- Budget plan
- Cumulative flat inventory required
- Meter inventory
- Store rate step detail information
- Prompt for calc-all upon completion of generate charges
- Require reason code for update/delete in Current Read/Consumption
- Require reason code for update/delete in Calculate charges

Other sections visible include:

- Processing:** Process by (Account/CID), Estimate/Average by (Account/CID), Apply credits by (Account), Calculate late on (Current bill).
- Proration:** Prorate from (Initial/final only), Prorate zero days as (1).
- Liens:** Process option (Utility lien), Debit tax receivable (unchecked).
- Annualized billing:** Start date (01/01/2011), Start new customer at tier 1 (unchecked).
- Deposit:** Deposit maximum (.00).
- EUSP credits:** State account (123456), Misc codes (10%FEE to 10%FEE).

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:

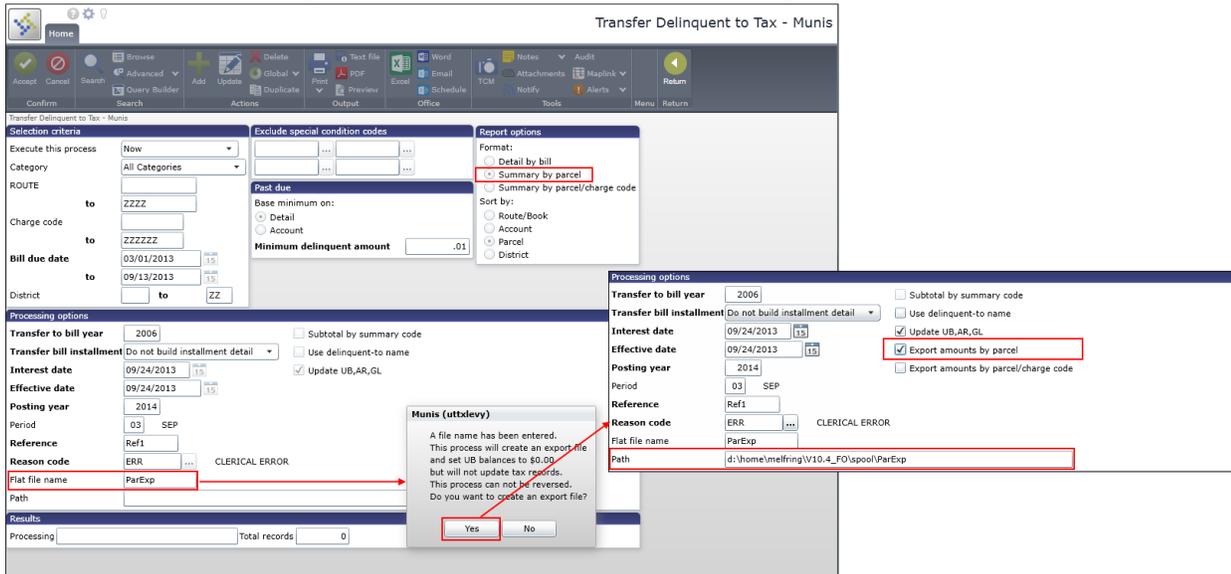
- Calculate Charges Reasons Codes for the code type CCR
- Current Read/Cons Reason Codes for the code type CRC

Transfer Delinquent to Tax

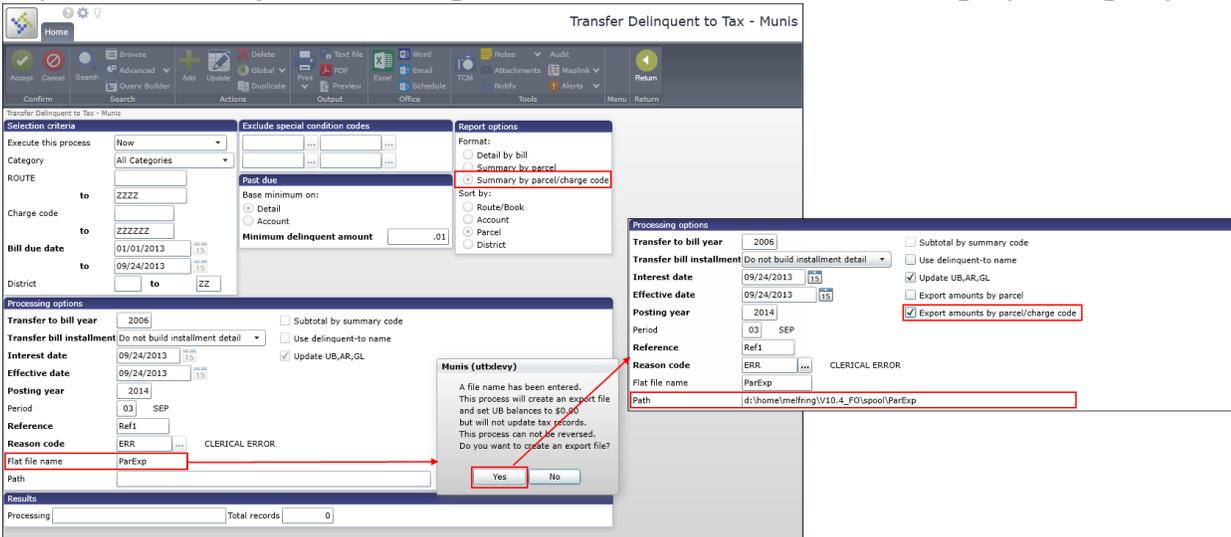
The Transfer Delinquent to Tax program provides an option to create an export file that groups amounts by parcel or parcel/charge code if you enter a value in the Flat File Name box.

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.

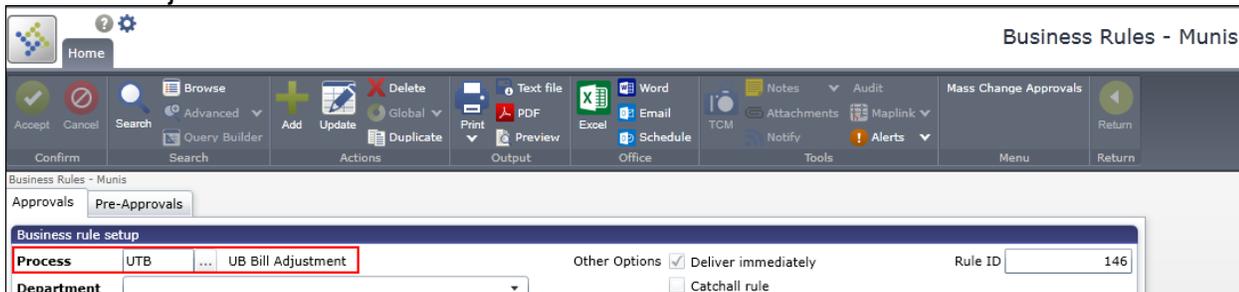


To create a summary report by parcel and charge code, in Report Options, select Summary by Parcel/Charge Code and then follow the same procedure as for the Parcel report, selecting the Export Amounts by Parcel/Charge Code check box in the Processing Options group.



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 screenshot shows the 'Business Rules - Munis' application interface. At the top, there is a navigation bar with a 'Home' button and a settings icon. Below this is a ribbon menu with various tool icons such as 'Accept', 'Cancel', 'Search', 'Advanced', 'Add', 'Update', 'Delete', 'Global', 'Print', 'Preview', 'Text file', 'PDF', 'Excel', 'Word', 'Email', 'Schedule', 'Notes', 'Attachments', 'Maplink', 'Alerts', 'Mass Change Approvals', and 'Return'. The main content area is titled 'Business Rules - Munis' and contains a 'Business rule setup' form. The form has a 'Process' field with the value 'UTB' and a dropdown menu showing 'UB Bill Adjustment'. To the right of the process field, there are 'Other Options' including a checked 'Deliver immediately' checkbox and an unchecked 'Catchall rule' checkbox. A 'Rule ID' field contains the value '146'. A 'Department' dropdown menu is visible at the bottom left of the form.

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.

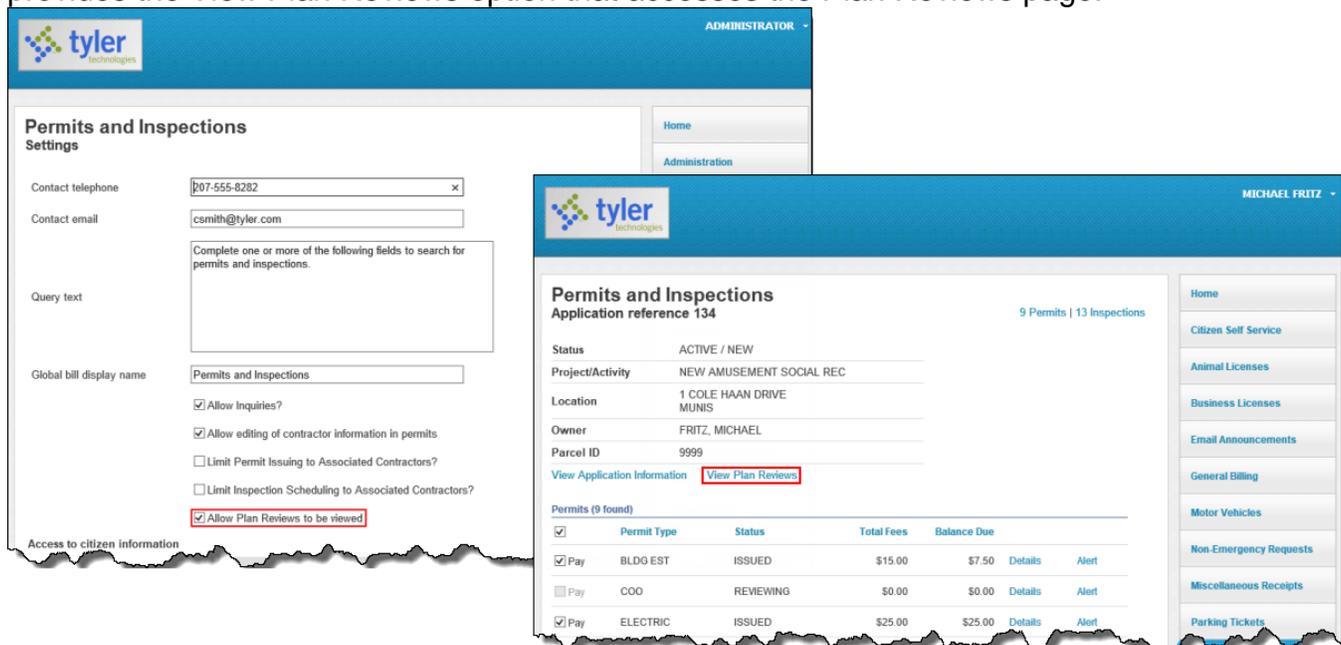
Citizen Self Service Version 10.4

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: 07-555-8282

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

Access to citizen information

Permits and Inspections Application reference 134 9 Permits | 13 Inspections

Status: ACTIVE / NEW

Project/Activity: NEW AMUSEMENT SOCIAL REC

Location: 1 COLE HAAN DRIVE MUNIS

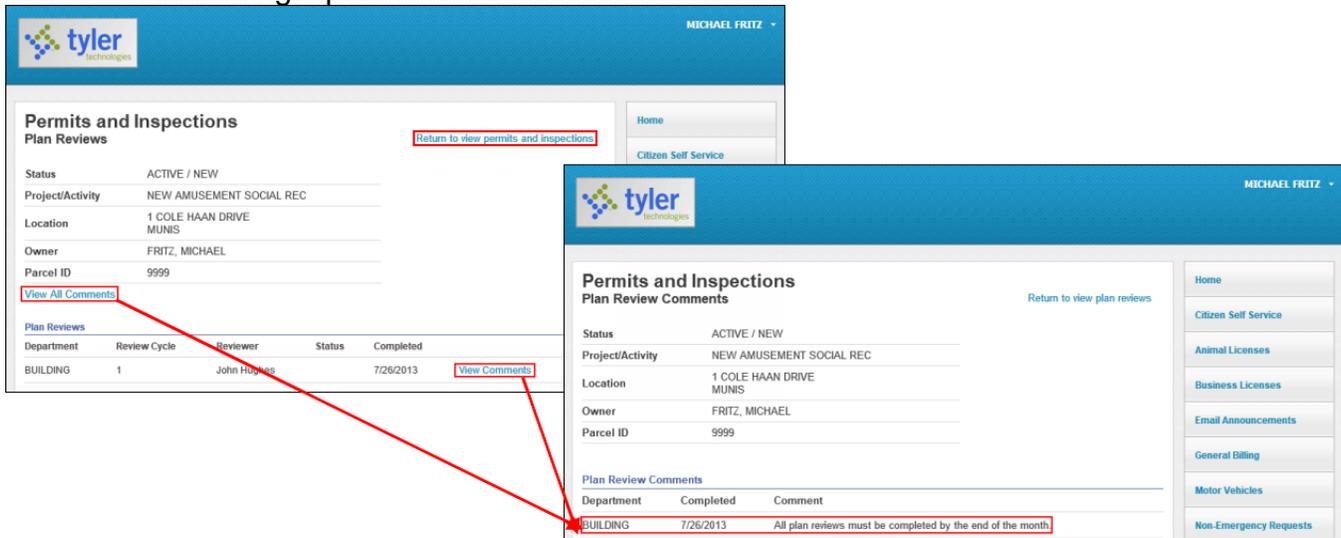
Owner: FRITZ, MICHAEL

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

Return to view permits and inspections

Home
Citizen Self Service

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	View Comments
BUILDING	1	John Hughes		7/26/2013	

Permits and Inspections Plan Review Comments

Return to view plan reviews

Home
Citizen Self Service
Animal Licenses
Business Licenses
Email Announcements
General Billing
Motor Vehicles
Non-Emergency Requests

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

Plan Review Comments

Department	Completed	Comment
BUILDING	7/26/2013	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 EP Advanced Add Update Delete Global PDF Word Notes Attachments Maplink List

Confirm Search Query Builder Actions Duplicate Output Preview Schedule Office Notify Alerts Esti

Permit Type

Permit code: POOL Level: 3

Description: POOL Fee use: All fees used

Short description: POOL Stop fee recal: N

Issuing department: BLDG BUILDING Days to expire: 365

Status: Active Max days to review: 7

Permit category: O - 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 cashing: Yes

Report summary 1: Workflow required

Report summary 2: Allow issue online

Work Order Activity: Lower level issue required

Work Order Template: 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	

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)

<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	FRITZ, MICHAEL			\$0.00	\$0.00	Details Schedule

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

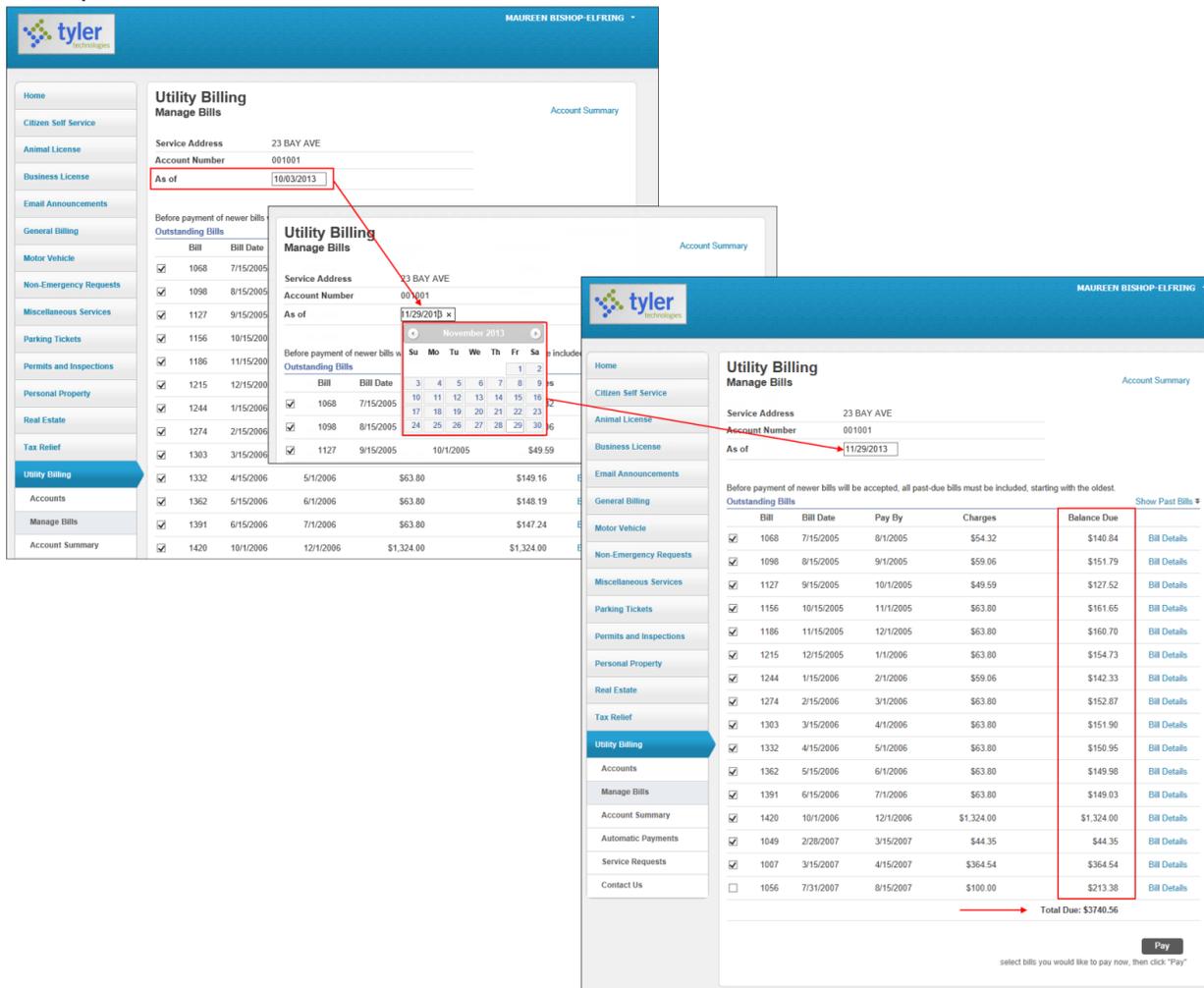
New Search

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.



The screenshot shows the 'Utility Billing Manage Bills' page. The 'As of' date is set to 10/03/2013. A calendar is shown for November 2013, with the date 11/29/2013 selected. The 'Balance Due' column in the bill list is highlighted in red.

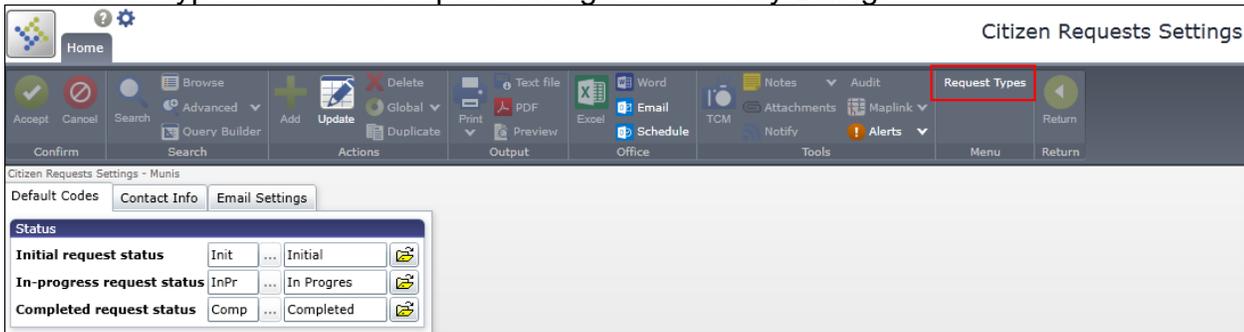
Bill	Bill Date	Pay By	Charges	Balance Due	Bill Details	
<input checked="" type="checkbox"/>	1068	7/15/2005	8/1/2005	\$54.32	\$140.84	Bill Details
<input checked="" type="checkbox"/>	1098	8/15/2005	9/1/2005	\$59.06	\$151.79	Bill Details
<input checked="" type="checkbox"/>	1127	9/15/2005	10/1/2005	\$49.59	\$127.52	Bill Details
<input checked="" type="checkbox"/>	1156	10/15/2005	11/1/2005	\$63.80	\$161.65	Bill Details
<input checked="" type="checkbox"/>	1186	11/15/2005	12/1/2005	\$63.80	\$160.70	Bill Details
<input checked="" type="checkbox"/>	1215	12/15/2005	1/1/2006	\$63.80	\$154.73	Bill Details
<input checked="" type="checkbox"/>	1244	1/15/2006	2/1/2006	\$59.06	\$142.33	Bill Details
<input checked="" type="checkbox"/>	1274	2/15/2006	3/1/2006	\$63.80	\$152.87	Bill Details
<input checked="" type="checkbox"/>	1303	3/15/2006	4/1/2006	\$63.80	\$151.90	Bill Details
<input checked="" type="checkbox"/>	1332	4/15/2006	5/1/2006	\$63.80	\$150.95	Bill Details
<input checked="" type="checkbox"/>	1362	5/15/2006	6/1/2006	\$63.80	\$149.98	Bill Details
<input checked="" type="checkbox"/>	1391	6/15/2006	7/1/2006	\$63.80	\$149.03	Bill Details
<input checked="" type="checkbox"/>	1420	10/1/2006	12/1/2006	\$1,324.00	\$1,324.00	Bill Details
<input checked="" type="checkbox"/>	1049	2/28/2007	3/15/2007	\$44.35	\$44.35	Bill Details
<input checked="" type="checkbox"/>	1007	3/15/2007	4/15/2007	\$364.54	\$364.54	Bill Details
<input type="checkbox"/>	1056	7/31/2007	8/15/2007	\$100.00	\$213.38	Bill Details

Total Due: \$3740.56

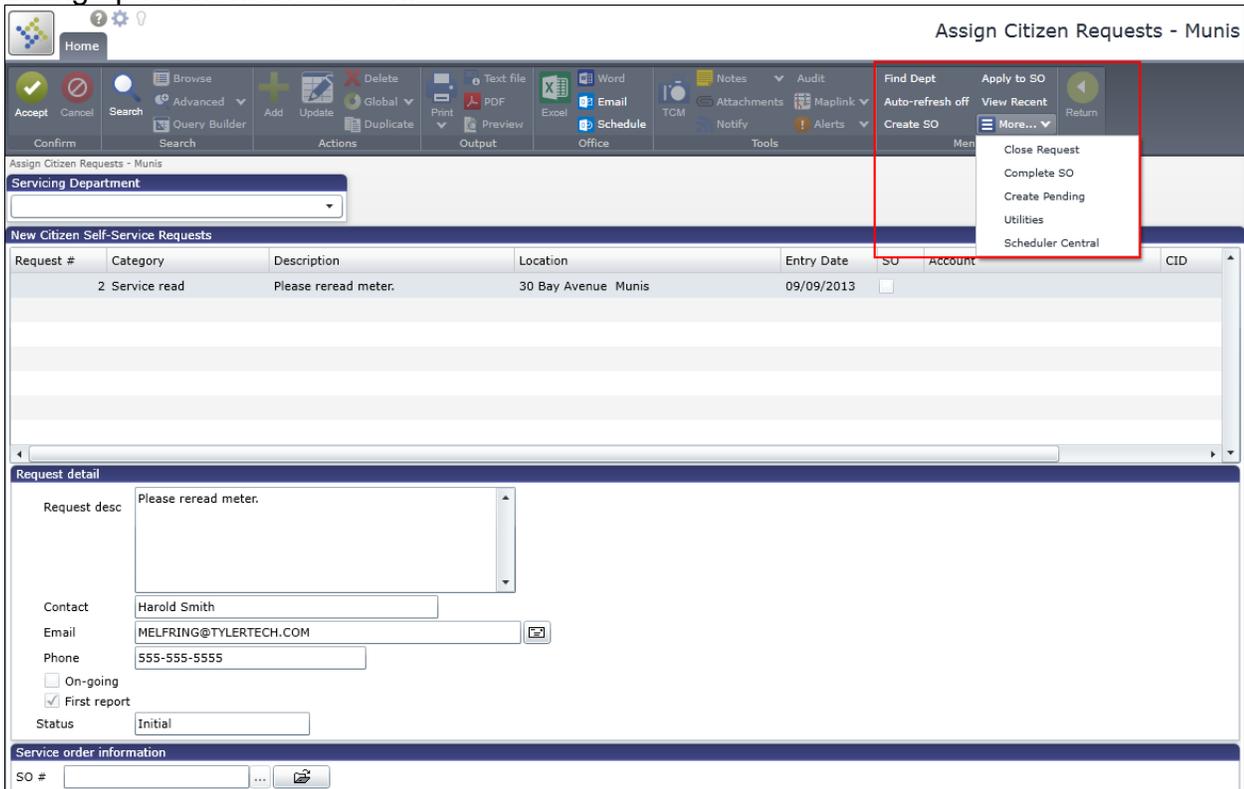
Using the As Of box to refresh bill amounts according to specified dates allows you to see how much interest, penalties, and so on, would accrue if you postpone paying the bill. There are no permanent changes as a result of using this recalculation feature.

Service Requests

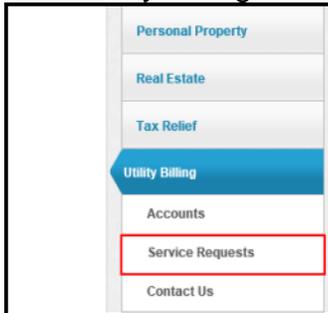
CSS – Utility Billing, in conjunction with the Munis Citizen Request Settings and Assign Citizen Requests programs, accepts and processes nonemergency service requests for utility billing accounts. Using Citizen Request Settings from the Munis Utility Billing menu, you can define the service types that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

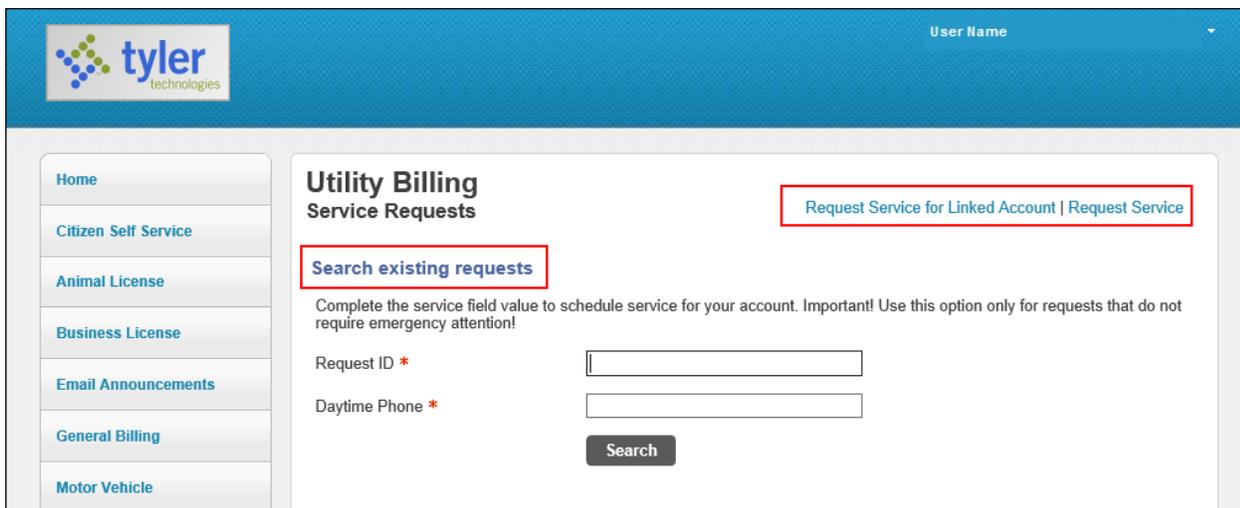


Once the service request set up is complete in CSS Administration, the Utility Billing menu in CSS-Utility Billing includes the Service Requests item.

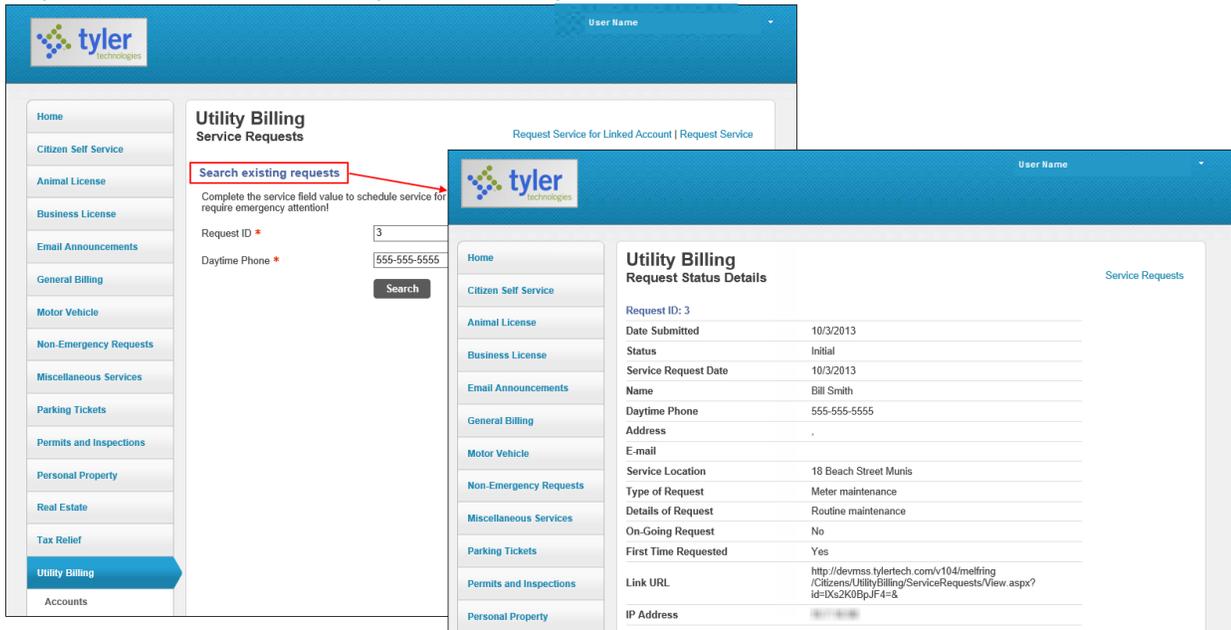


The main Service Requests page provides three options:

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

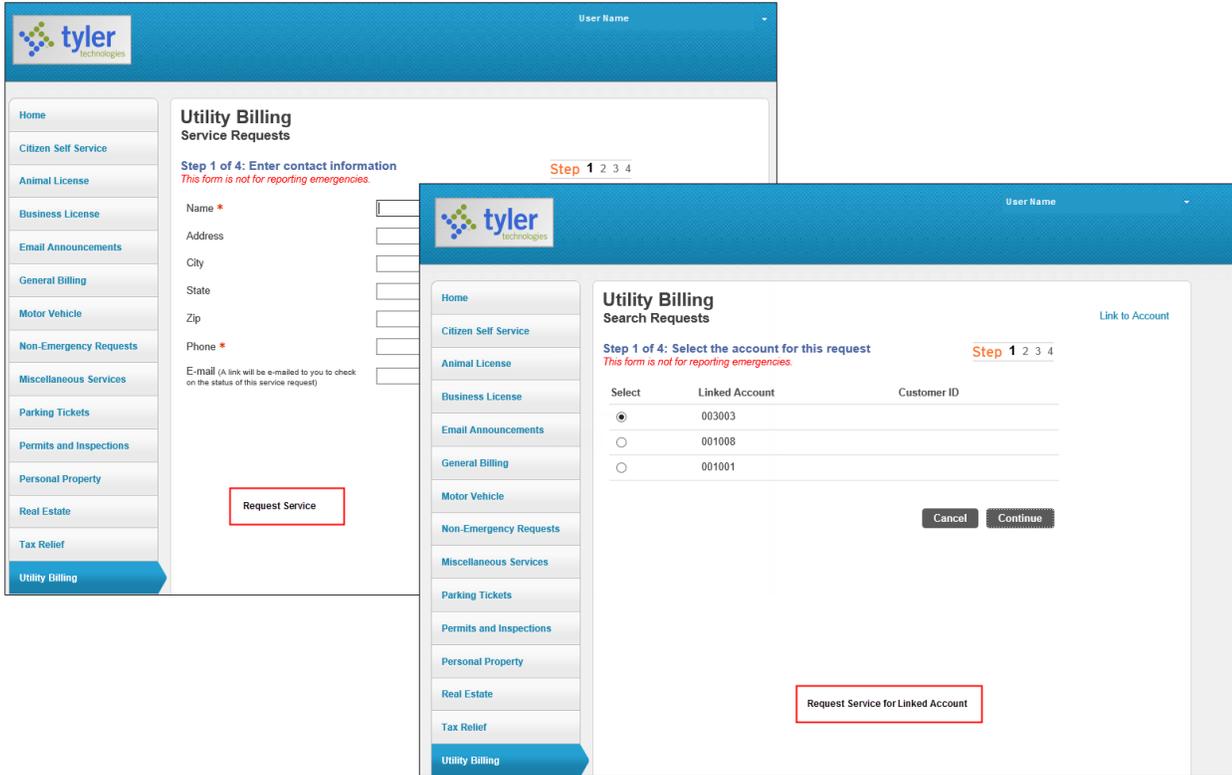


The Search Existing Requests option provides searching for existing service requests by the request ID number and requestor's telephone number.

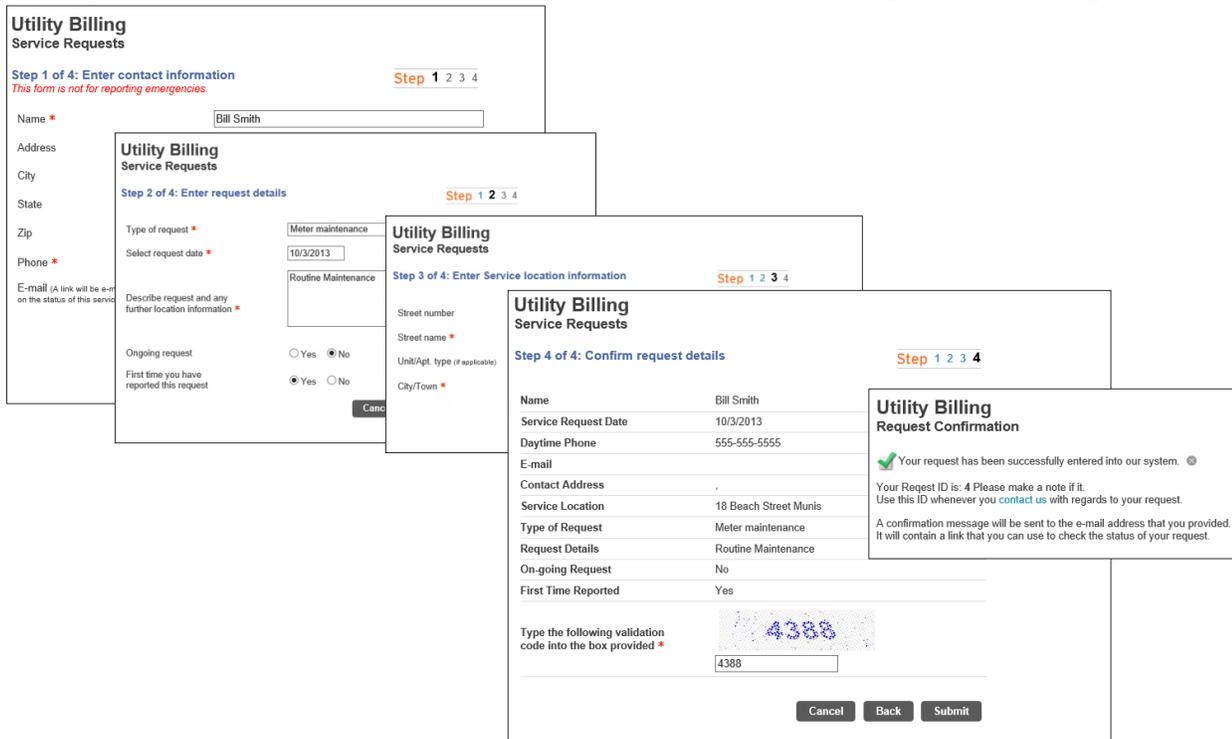


Selecting Request Service displays a Step 1 page that provides the Name, Address, Phone, and Email fields. Only the Name and Phone values are required, but to receive an email confirmation for the request, you must complete the Email box.

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.

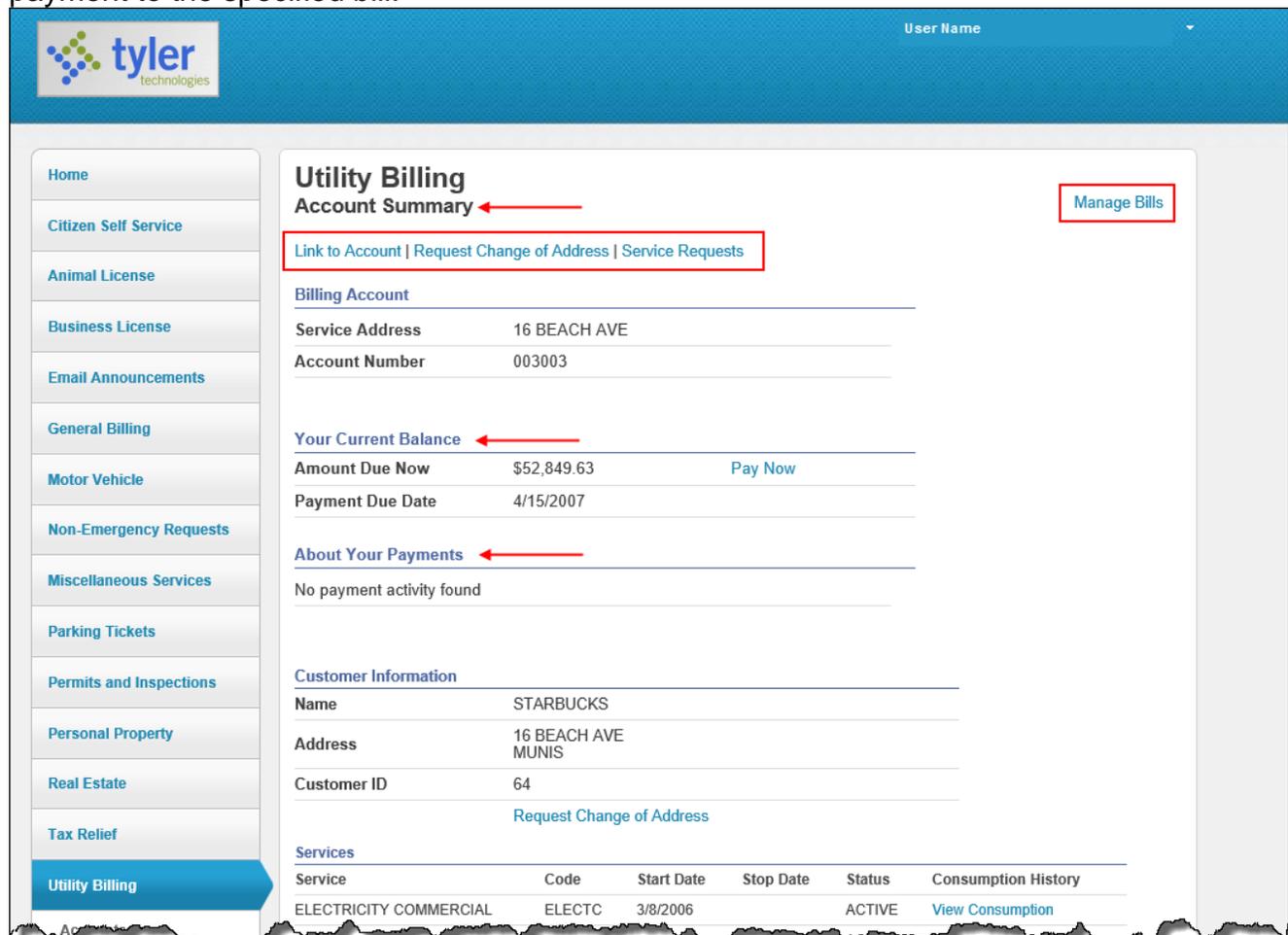


The process for completing a service request includes four steps, after which the program displays an on-screen confirmation and also sends a confirming email message.



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.



Utility Billing Account Summary [Manage Bills](#)

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

Billing Account

Service Address 16 BEACH AVE
Account Number 003003

Your Current Balance

Amount Due Now \$52,849.63 [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 64
[Request Change of Address](#)

Services

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

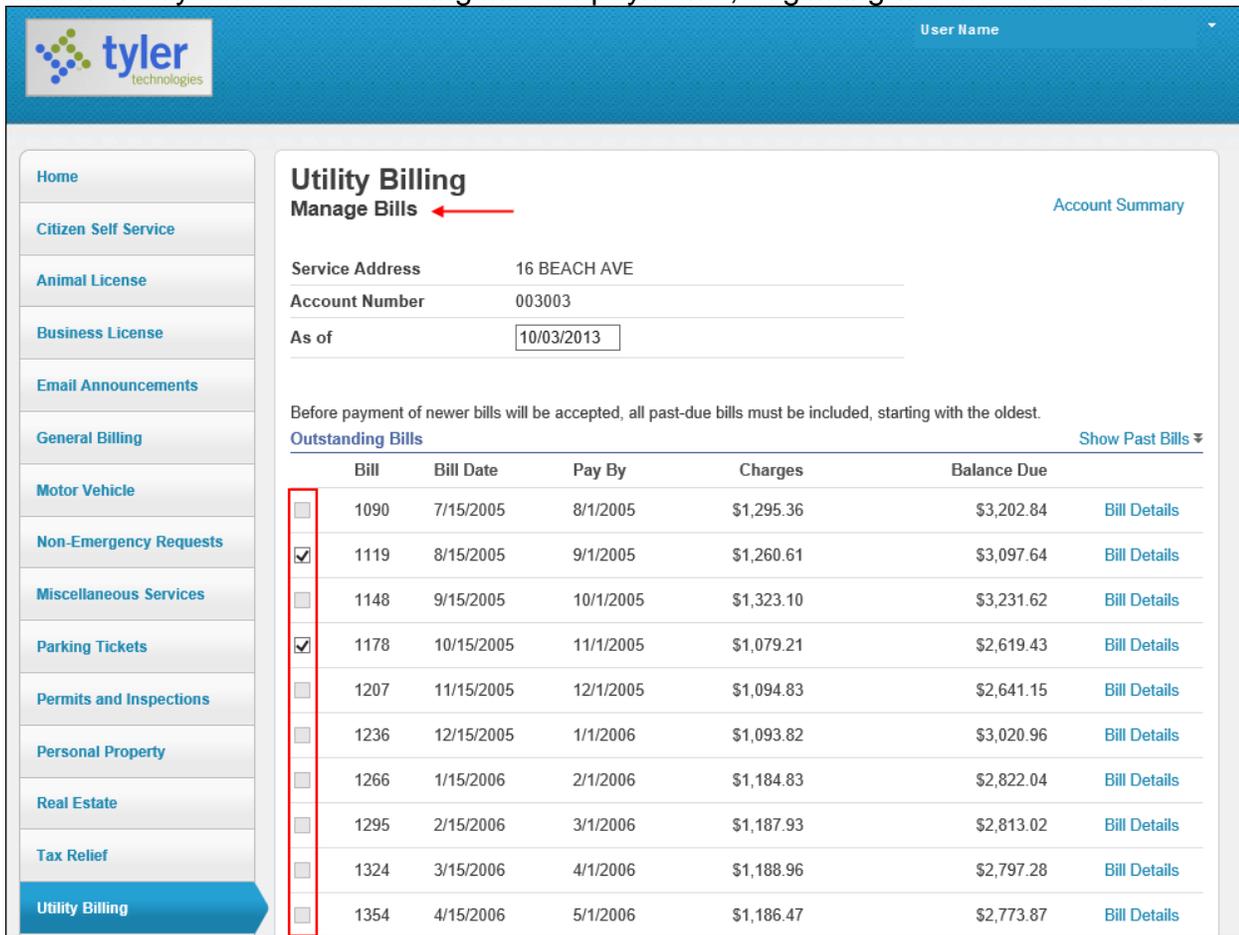
The About Your Payments group displays the last posted payment, provided this amount is greater than zero. A maximum of five payment activity records are available and each row has a Details link that displays the Payments and Adjustment page for the bill.

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 ← [Account Summary](#)

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"/>	1236	12/15/2005	1/1/2006	\$1,093.82	\$3,020.96	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 * <small>digits</small>	<input style="width: 40%;" 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 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:

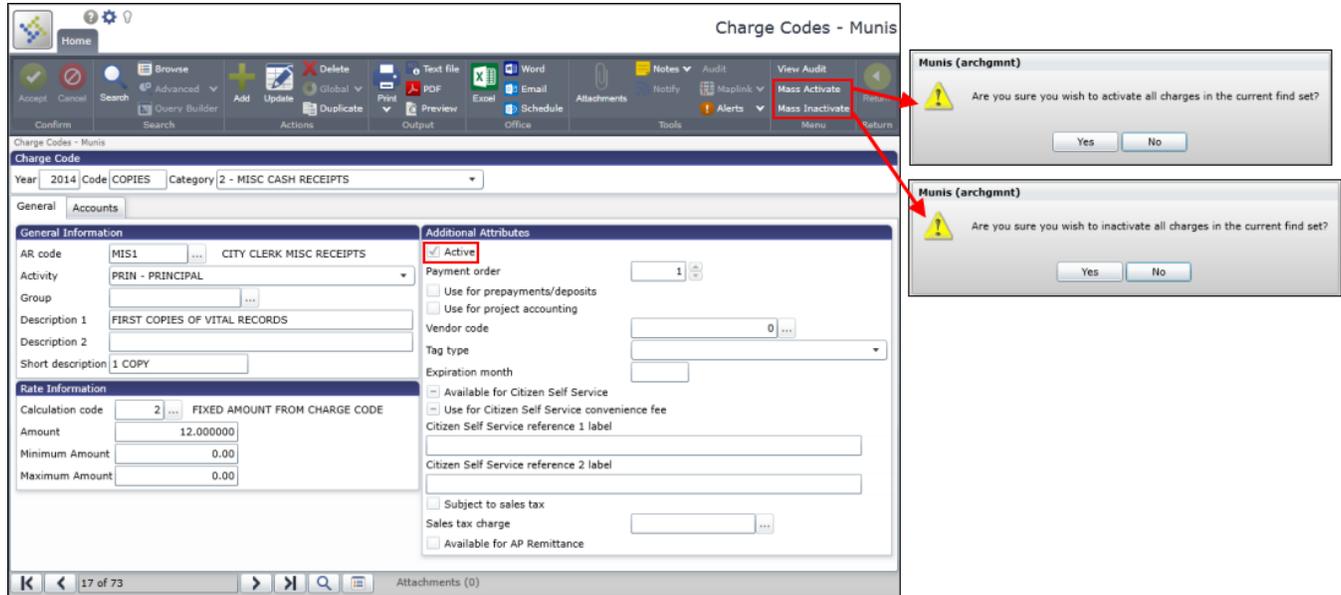
- General Revenues includes Accounts Receivable, Animal Licenses, General Billing, Maine Vehicle Registration, Parking Tickets, Slip Reservations, Vehicle Stickers, and Virginia State Income Tax.
- Property Revenues includes Accounts Receivable, Business Licenses, Central Property, Permits and Code Enforcements,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

Accounts Receivable Settings - Munis

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

Cash Accounting Over/Short (Write-off) Options

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?

Over = AR | Ovr Sht Short = Ovr Sht | AR
 Revenue | Def Rev Def Rev | Revenue

For a positive balance bill, reduce the deferred revenue account instead of posting to the over/short account

Y = Def Rev | AR N = Ovr Sht | AR

For a non-tax receivable bill with a credit balance, post to the deferred revenue and revenue accounts in addition to posting to the accounts receivable account and to the over/short account

Y = AR | Ovr Sht N = AR | Ovr Sht
 Revenue | Def Rev Revenue | Def Rev

Cash Accounting Discount Options

Post to the deferred revenue and revenue accounts in addition to posting to the discount and accounts receivable accounts?

Y = Discount | AR N = Discount | AR
 Def Rev | Revenue Def Rev | Revenue

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.

Accounts Receivable Codes - Munis

Code information

Code: PP
 Description: PERSONAL PROPERTY
 Short description: PP
 AR category: 25 - PERSONAL PROPERTY

Accounting information

Accounting method: Cash Accrual

Cash account: 1000 | 1010 | ... | CASH

Address information

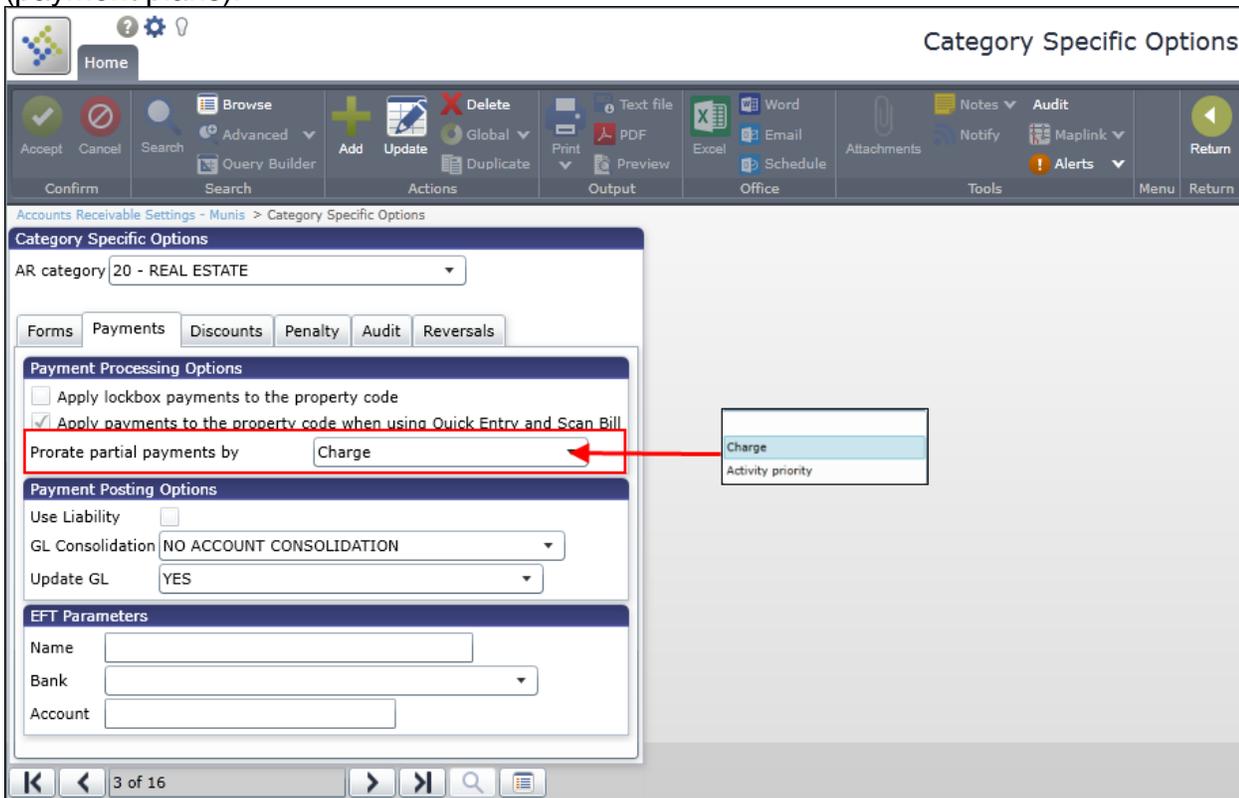
Name: CITY OF MUNIS
 Address: 123 MUNIS ST
 City/State/Zip: MUNIS | US | 12345-6789

01/16/2014 11:19 | MUNIS | PG 5
 brand1e | PAYMENTS JOURNAL REPORT | arrcptst

CLERK: brand1e

YEAR PER	JNL	SRC ACCOUNT	EFF DATE	JNL DESC	REF 1	REF 2	REF 3	ACCOUNT DESC	T OB	DEBIT	CREDIT
2014 7	6	CRW 1000-1200	01/16/2014	cash rcpt PP	2104			ACCOUNTS RECEIVABLE			34.47
								2010 PP TAX			
								OVER SHORT ADJUSTMENT		34.47	
								2010 PP TAX			
								TAX REVENUE			34.47
								2010 PP TAX			
								DEFERRED REV		34.47	
								2010 PP TAX			
										68.94	68.94
2014/7 20140116 WRITEOFFS JOURNAL 2014/07/6 TOTAL											
2014 7	6	CRW 1000-3910	01/16/2014					REVENUE CONTROL			34.47

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).



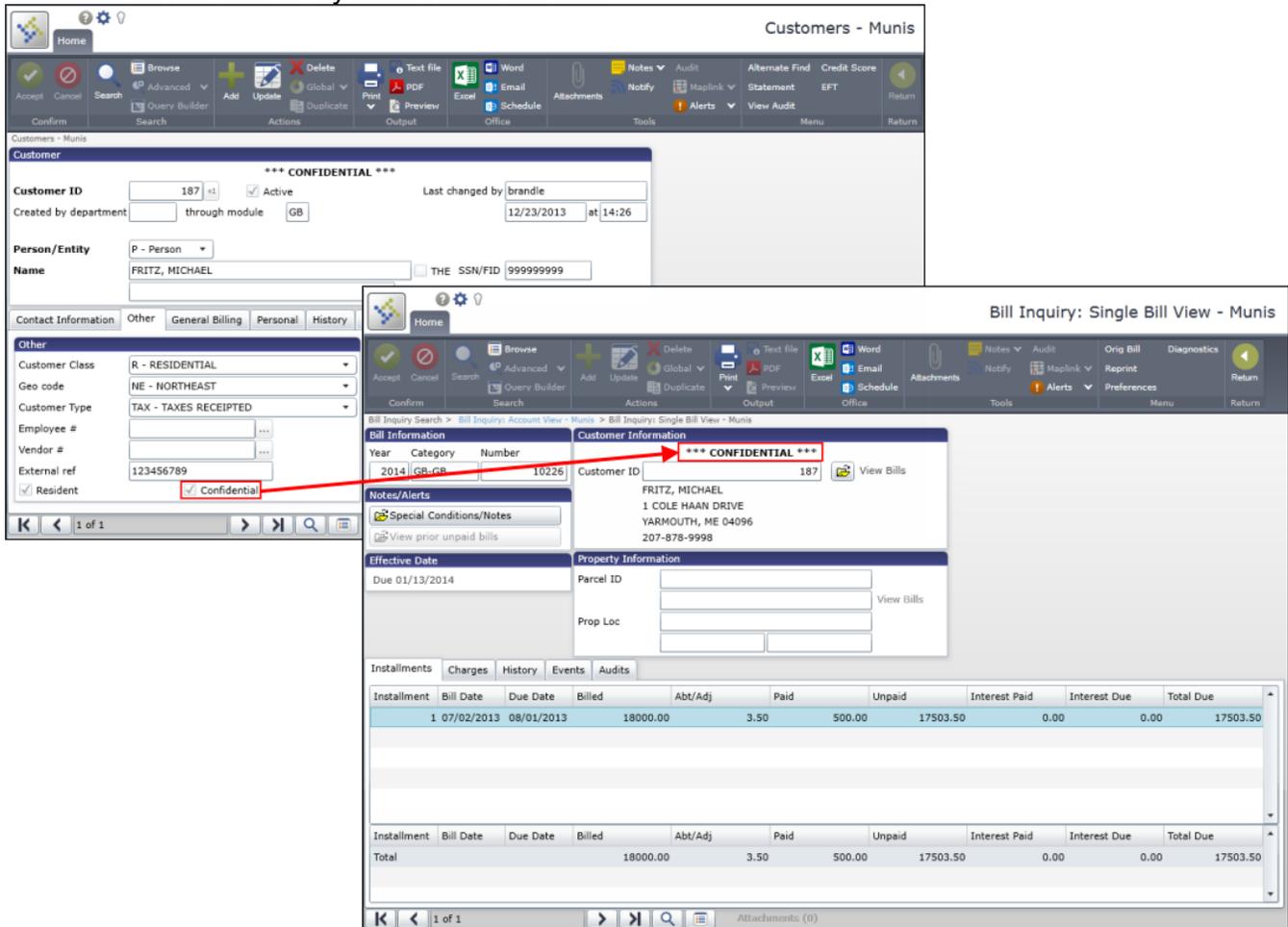
The list includes Charge or Activity Priority options that provide the following results:

- 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 shows two windows from the Munis system. The top window is titled "Customers - Munis" and displays the "Customer" form. The "Customer ID" is 187, and the name is FRITZ, MICHAEL. The "Other" tab is selected, and the "Confidential" checkbox is checked. The bottom window is titled "Bill Inquiry: Single Bill View - Munis" and displays a bill for the same customer. The "Customer Information" section is masked with "*** CONFIDENTIAL ***".

Customer Information:

Year	Category	Number
2014	GB	10226

Property Information:

Effective Date	Due Date	Billed	Abt/Adj	Paid	Unpaid	Interest Paid	Interest Due	Total Due
01/13/2014	07/02/2013	08/01/2013	18000.00	3.50	500.00	17503.50	0.00	0.00
Total			18000.00	3.50	500.00	17503.50	0.00	0.00

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 Attachments Notify Alerts Preferences Reprint 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

Installments Charges History Events Audits

Installment	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

1 of 1 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

Brian Randle Logout

Batch 203 - Finance Office

Batch Total \$0.00 (0 transactions)

Transaction Amount \$0.00

Transaction Payment Tender Current

Trans Paid By Amount

Real Estate

Customer Information

ID: 187
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	146 POOL	POOL - REVIEW	15.00	15.00	15.00

Real Estate

Select	Year	Item	Parcel	Balance	Due	Payment
<input checked="" type="checkbox"/>	2010-04	1000001	9999	1,538.14	1,538.14	1,538.14
<input checked="" type="checkbox"/>	2011-04	5	9999	6,205.54	6,205.54	6,205.54
<input checked="" type="checkbox"/>	2013-04	1000001	9999	3,245.05	3,245.05	3,245.05

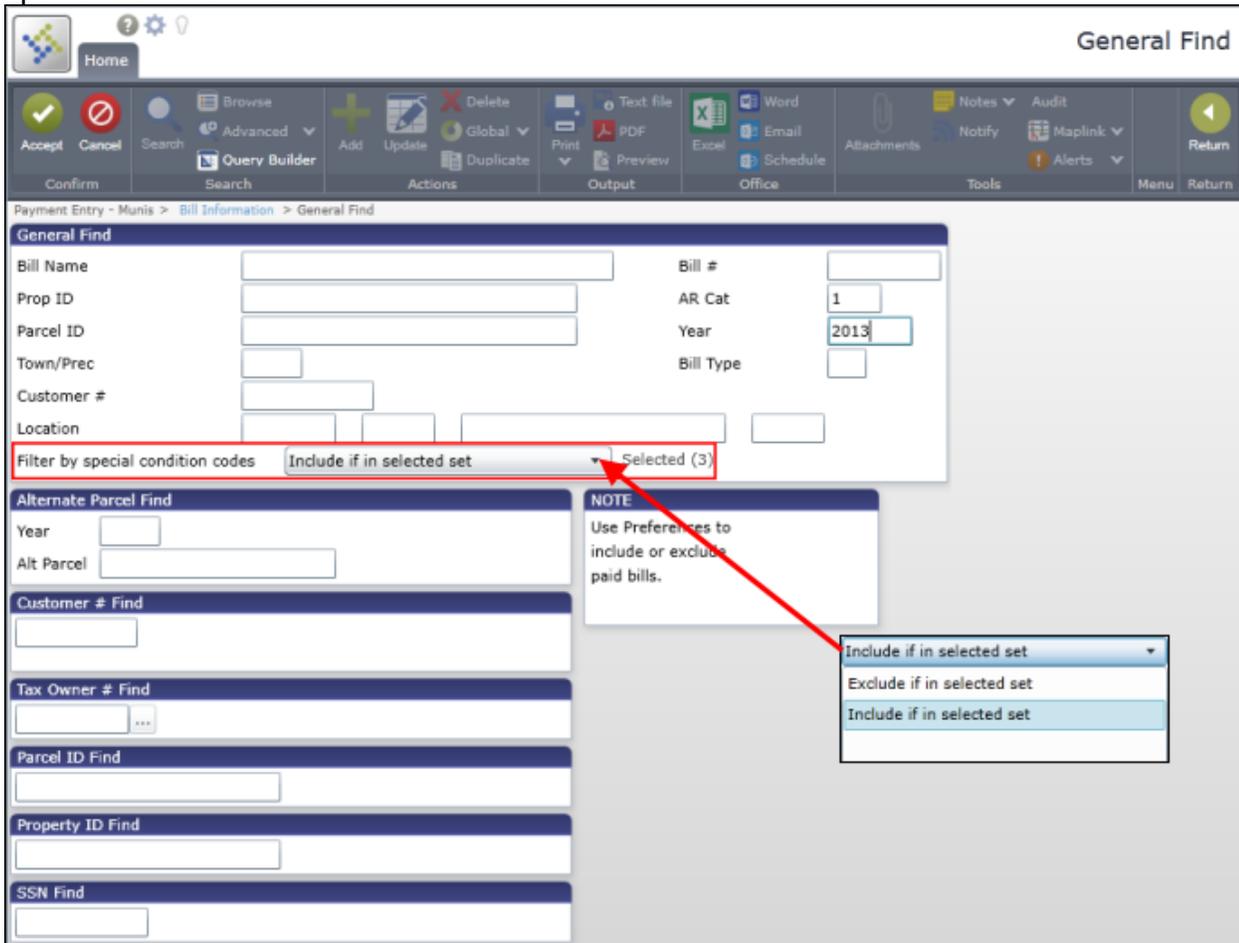
Alert

CONFID
Customer is marked confidential

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.

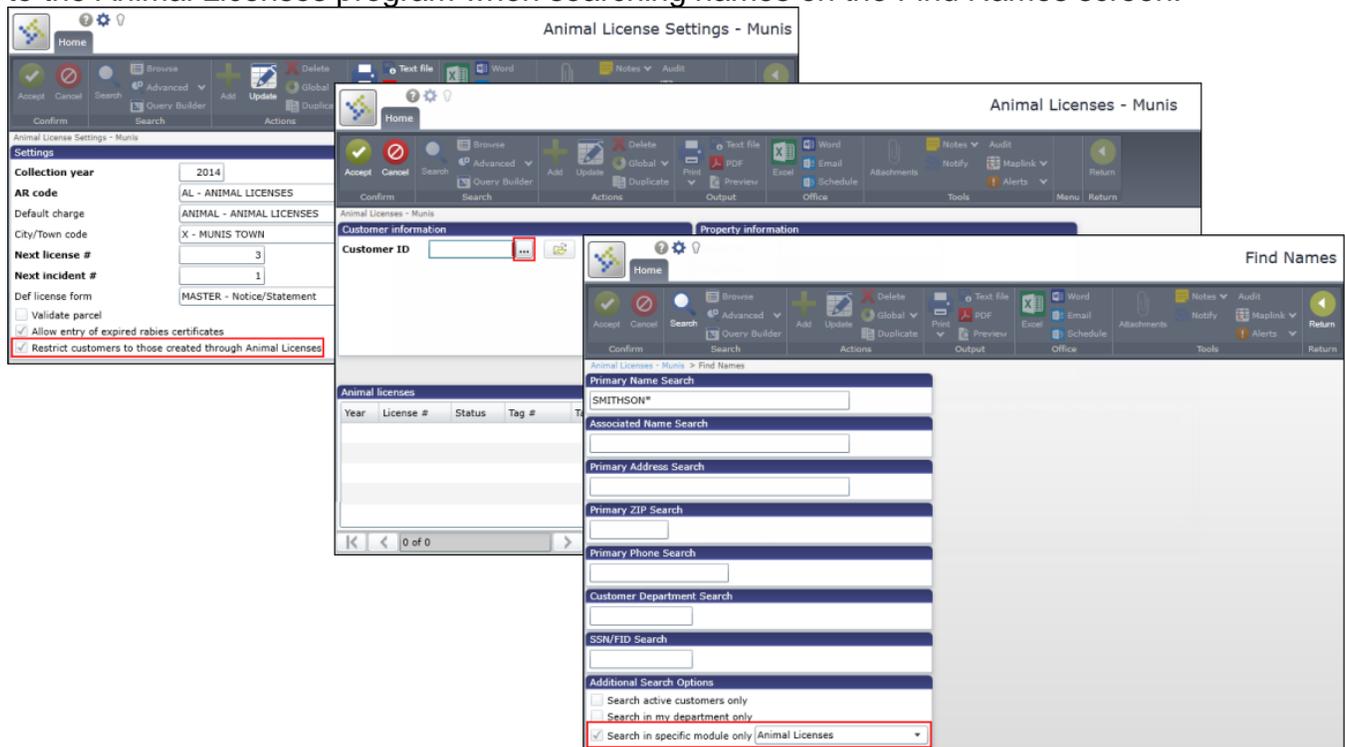


Animal Licenses 10.5

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.



The image displays three overlapping screenshots from the Munis Animal License system, illustrating the configuration and search options.

Animal License Settings - Munis: This window shows the configuration for animal licenses. The 'Restrict customers to those created through Animal Licenses' checkbox is checked, indicating that only customers created through this module will be available for search.

Animal Licenses - Munis: This window shows the 'Customer information' section, including a 'Customer ID' field.

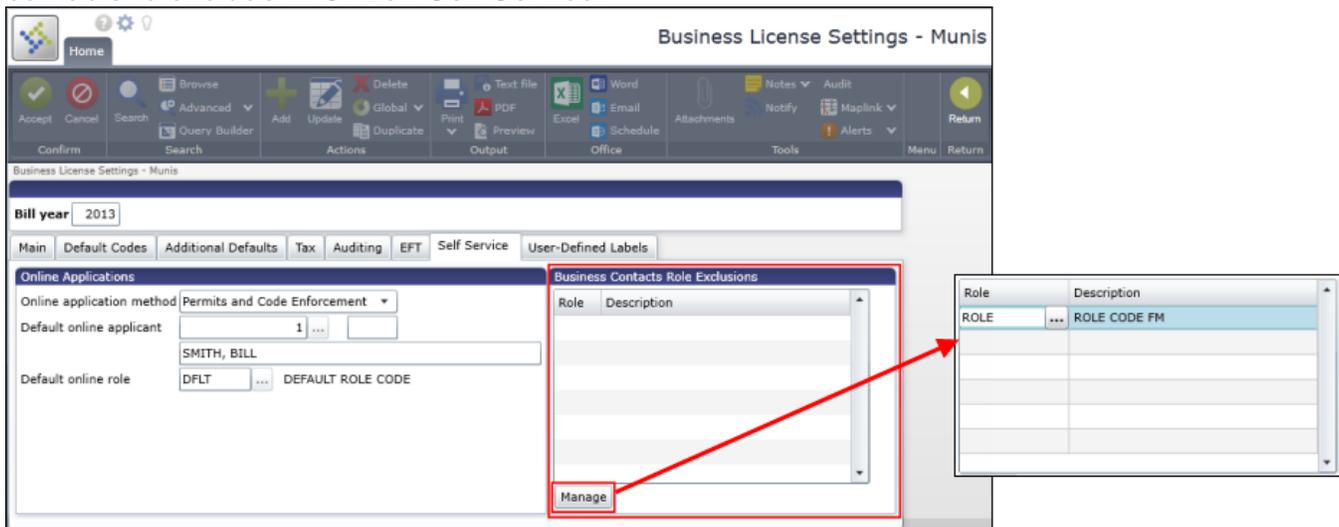
Find Names: This window shows the search options for finding names. The 'Search in specific module only' dropdown menu is set to 'Animal Licenses', ensuring that only customers created through the Animal License module are returned in the search results.

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.

Business Licenses Account Review

1 License | Add New License | Return to Accounts

FRITZ, MICHAEL

Account ID: 20070084
 Status: ACTIVE
 DBA: FRITZ, MICHAEL
 Location: 1 COLE HAAN DRIVE BLDG 1 MUNIS ME 04096
 Business owner name: FRITZ, MICHAEL
 Agent operator name: FRITZ, MICHAEL
 Business contact name:
 Business phone number: 207-878-9998
 Alternate phone number:
 Fax number:
 Email:
 Website:

Contacts [Add New](#)

No contacts were found for this account.

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.

Location Master - Munis

Location Mass Assign

Selection criteria

Type: **Zip Codes**

Code: []

Include historical locations
 Include non-property locations

Results

Updated: []

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

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

Location

Property address

Parcel: 99999

Location ID: 72

Sequence: 0

1 CLIPPER STREET
FRITZ, MICHAEL

Location no: 1

Street ID: 3

Pre-dir: ...

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: 43.782563000000000000000000

70.190097000000000000000000

GIS Reference: ...

Alternate ID: ...

Description: Additional office space outside of the warehouse.

Building: 0

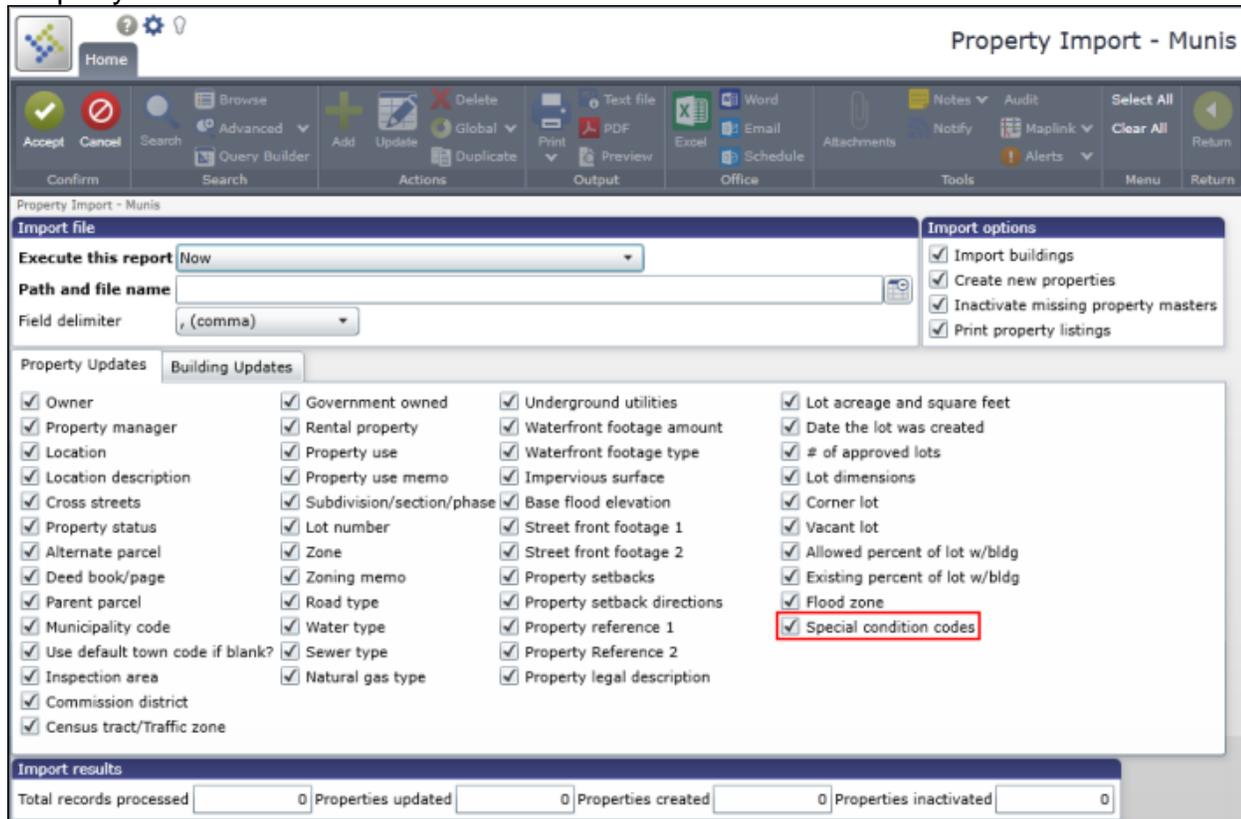
Reference 1: ...

Reference 2: ...

1 of 1

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 screenshot shows the 'Property Import - Munis' application window. The 'Import options' panel on the right contains the following checked items:

- Import buildings
- Create new properties
- Inactivate missing property masters
- Print property listings
- Special condition codes (highlighted with a red box)

The 'Property Updates' section on the left has the following checked items:

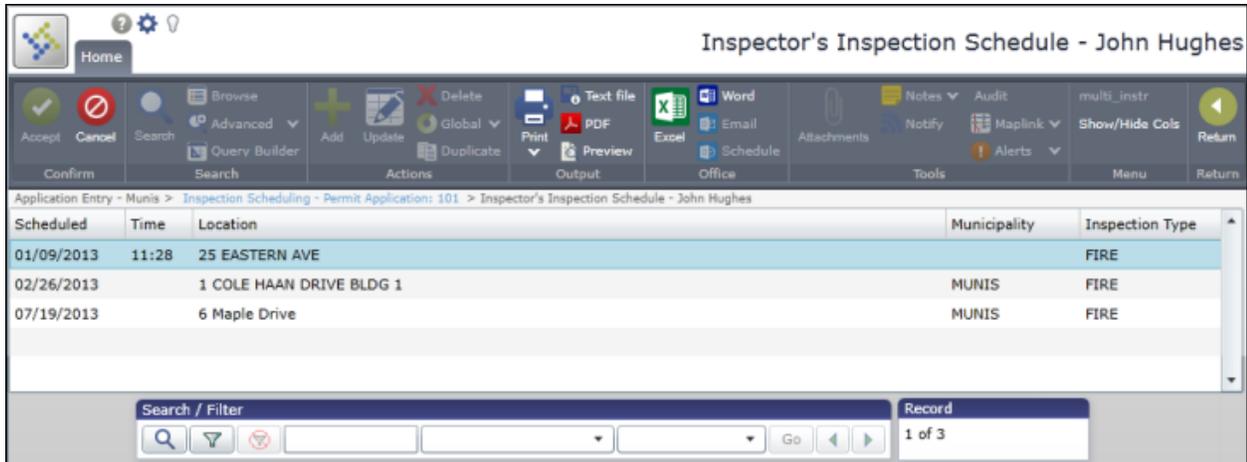
- Owner
- Property manager
- Location
- Location description
- Cross streets
- Property status
- Alternate parcel
- Deed book/page
- Parent parcel
- Municipality code
- Use default town code if blank?
- Inspection area
- Commission district
- Census tract/Traffic zone
- Government owned
- Rental property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

The 'Import results' section at the bottom shows:

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.



Scheduled	Time	Location	Municipality	Inspection Type
01/09/2013	11:28	25 EASTERN AVE		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 Duplicate Print PDF Excel Word Email Attachments 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: 1

Severity/Priority label: Severity

Initial Complaint Source: ...

Reinspection inspector method: 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

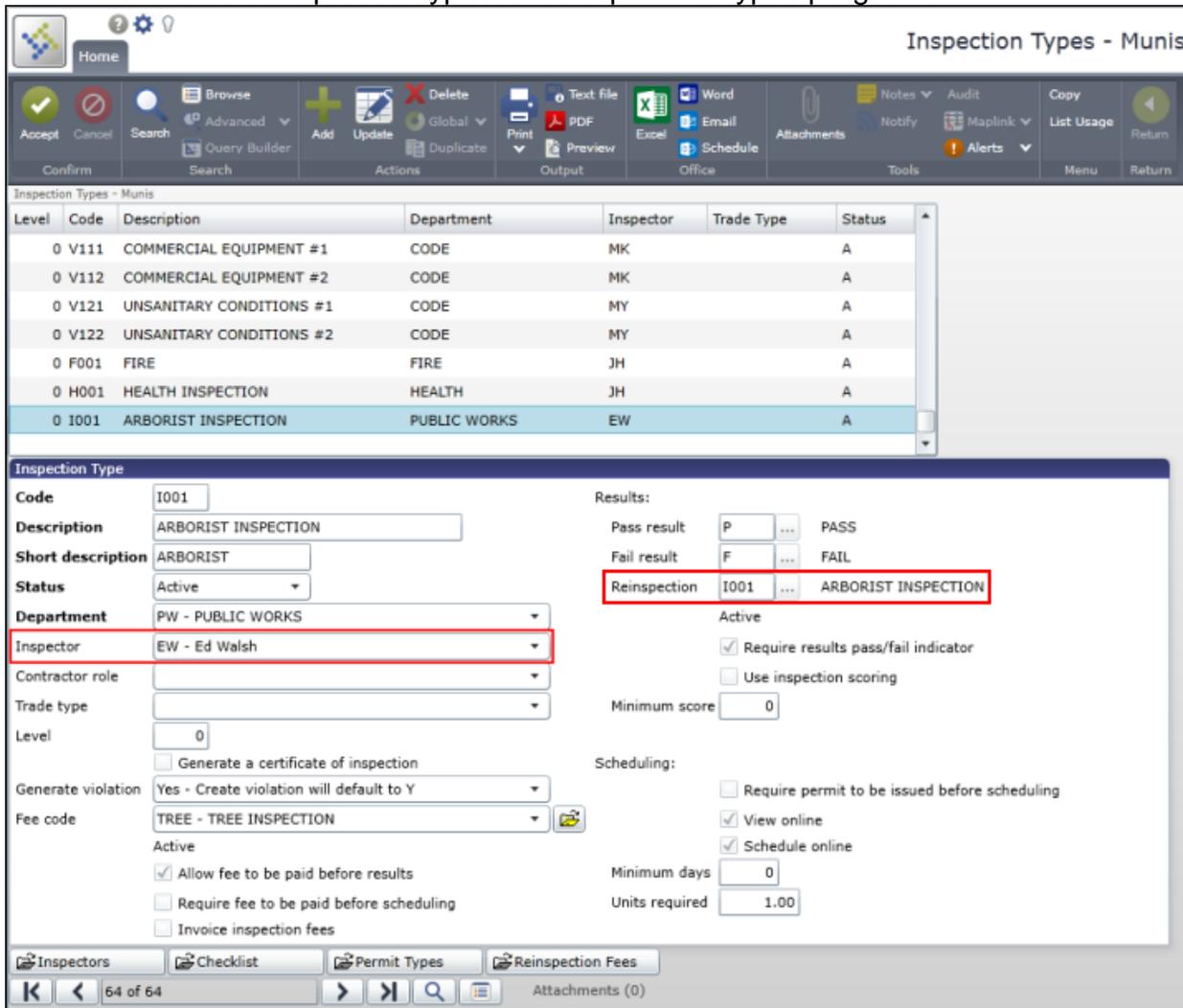
Inspection Scheduling

Perform Inspection Scheduling in: MUNIS Import

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.



Inspection Types - Munis

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

Inspection Type

Code: I001
 Description: ARBORIST INSPECTION
 Short description: ARBORIST
 Status: Active
 Department: PW - PUBLIC WORKS
 Inspector: EW - Ed Walsh
 Contractor role:
 Trade type:
 Level: 0
 Generate violation: Yes - Create violation will default to Y
 Fee code: TREE - TREE INSPECTION

Results:
 Pass result: P ... PASS
 Fail result: F ... FAIL
 Reinspection: I001 ... ARBORIST INSPECTION
 Active
 Require results pass/fail indicator
 Use inspection scoring
 Minimum score: 0

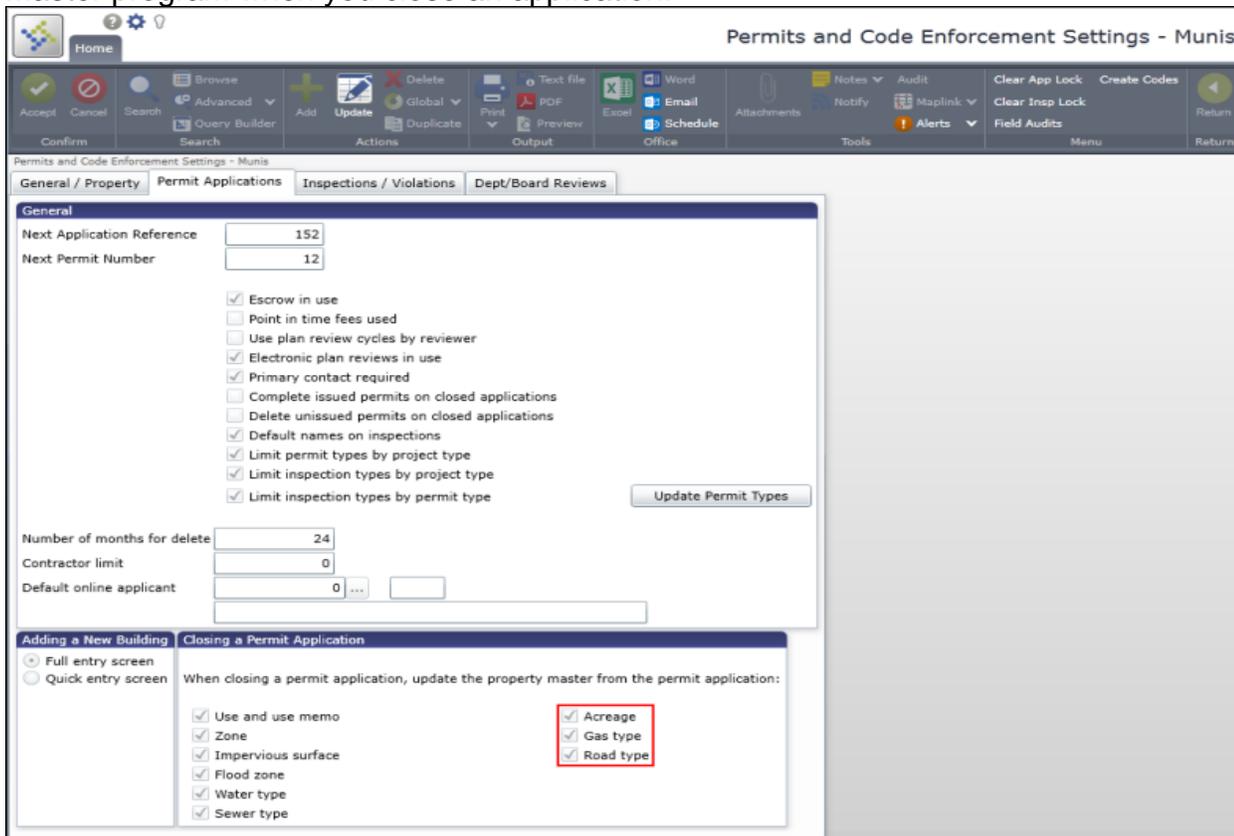
Scheduling:
 Require permit to be issued before scheduling
 View online
 Schedule online
 Minimum days: 0
 Units required: 1.00

Active
 Allow fee to be paid before results
 Require fee to be paid before scheduling
 Invoice inspection fees

Inspectors Checklist Permit Types Reinspection Fees

64 of 64 Attachments (0)

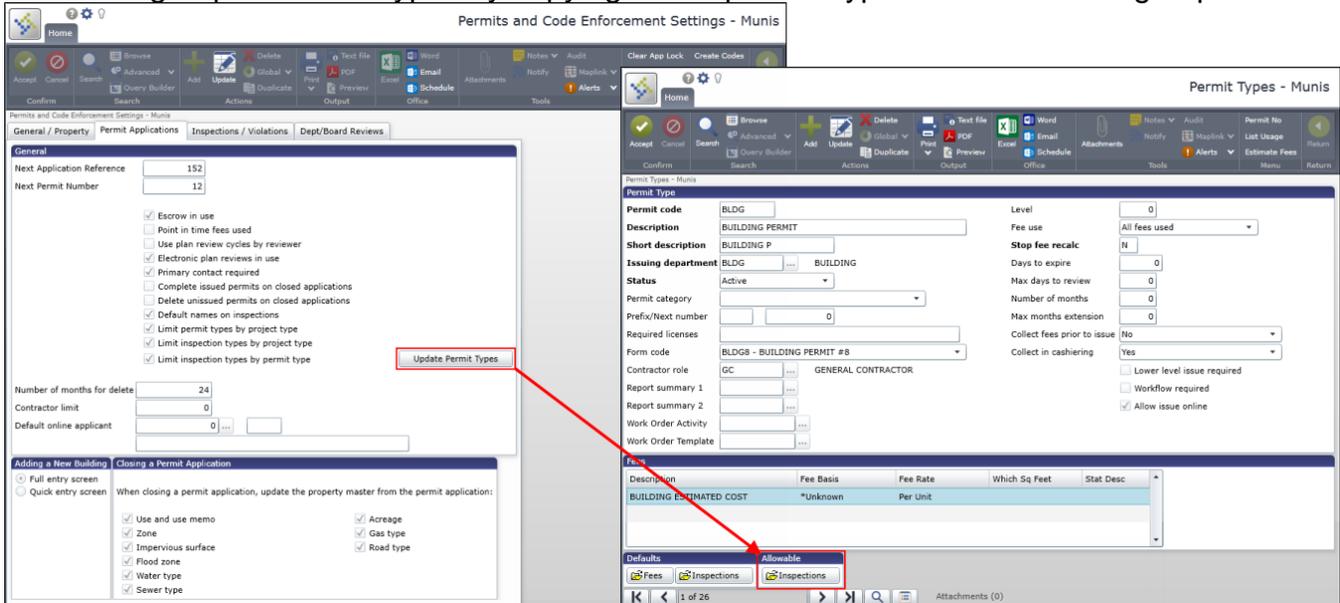
The Acreage, Gas Type, and Road Type check boxes are available on the Permit Applications tab. When selected, these check boxes update the specified data for records in the Property Master program when you close an application.



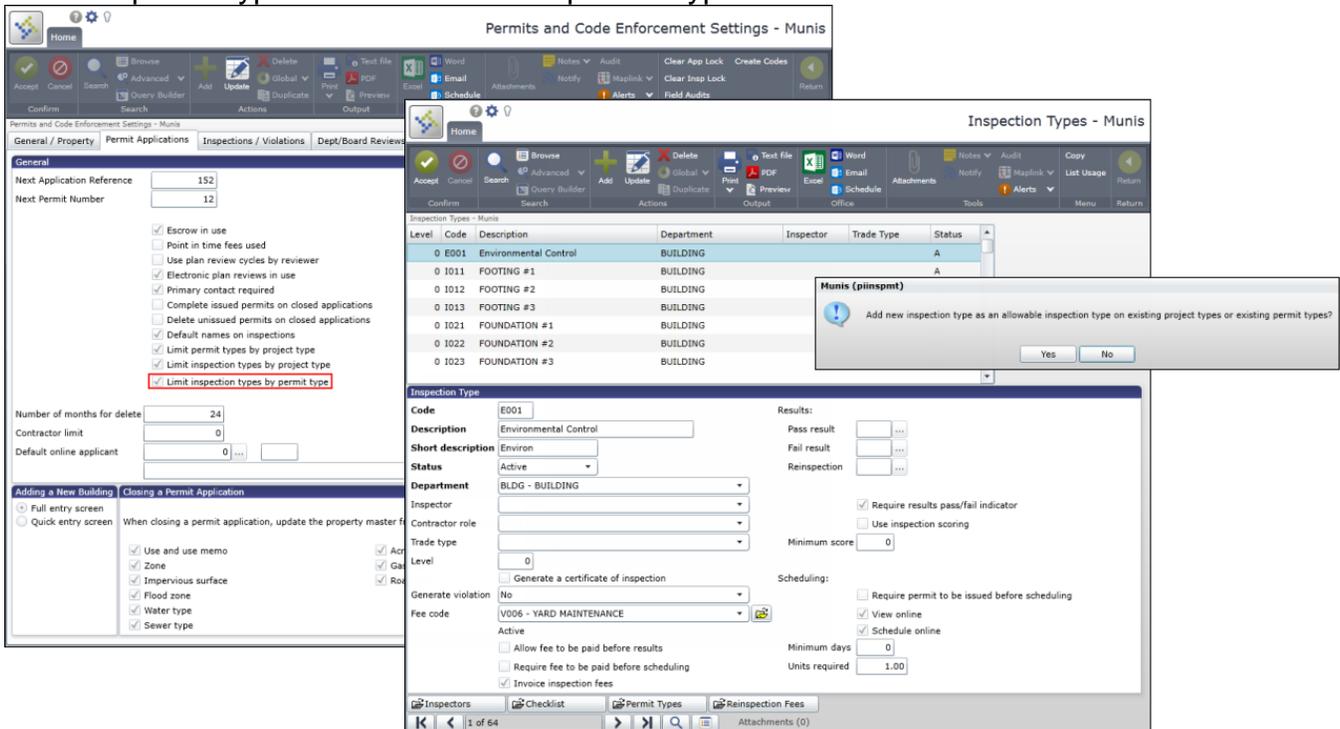
When the permit application closes and the Project Type category is Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal, the following updates occur:

- 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.

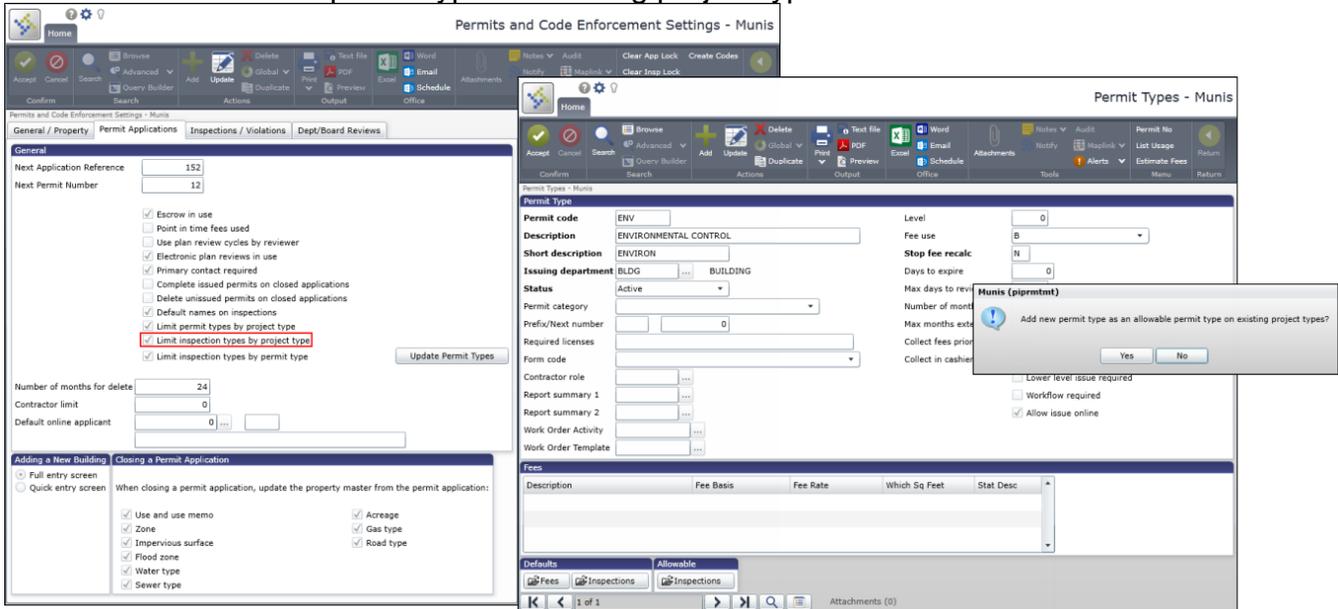
The Update Permit Types button on the Permit Applications tab creates inspection types in the Allowable group in Permit Types by copying the inspection types in the Defaults group.



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.

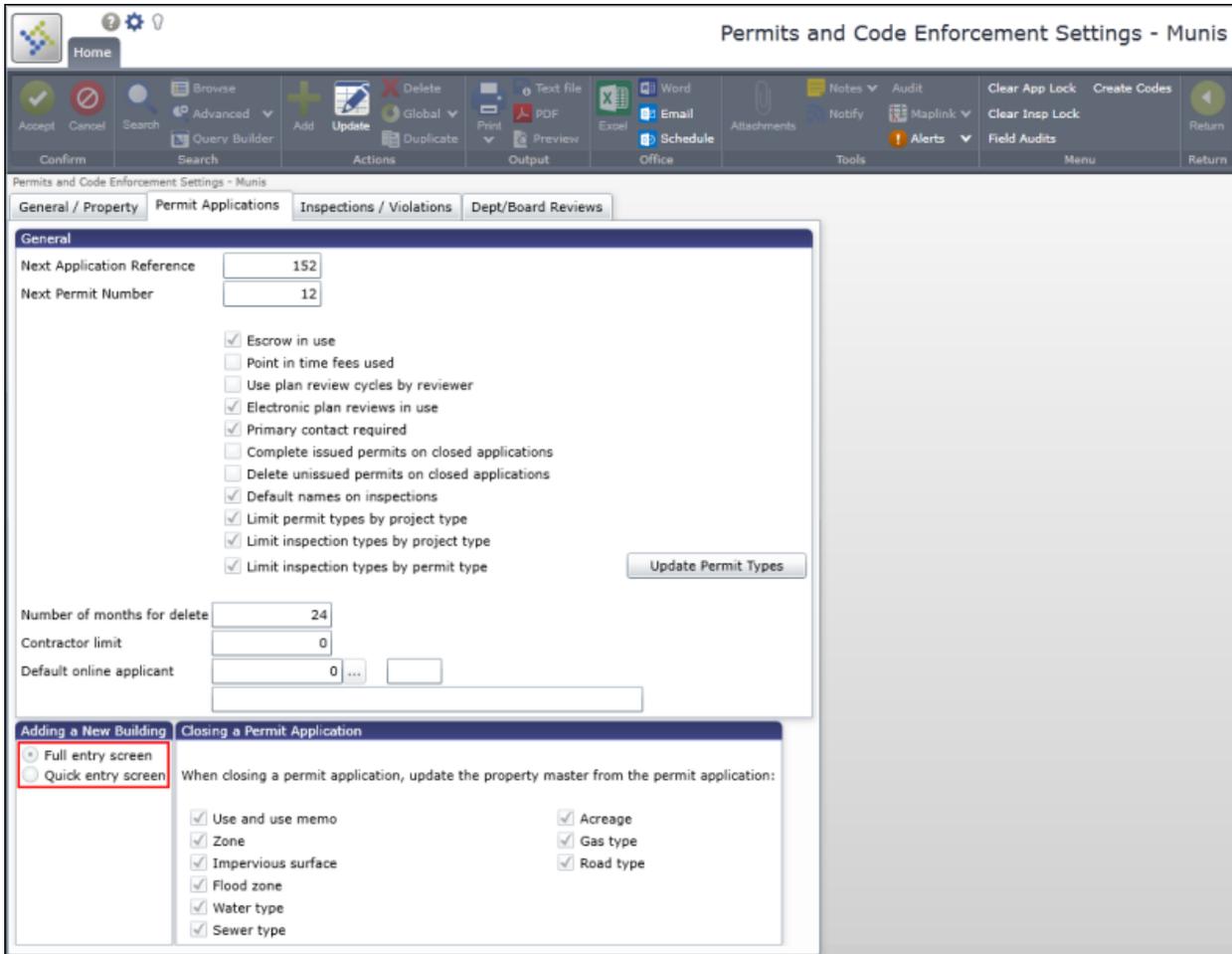


When the Limit Permit Types by Project Type check box is selected and you click the Update Permit Types button, the Project Type program includes Permits in the Allowable group, where the existing permit type is also in the Defaults group. When you add a new Permit Type, the program displays a confirmation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

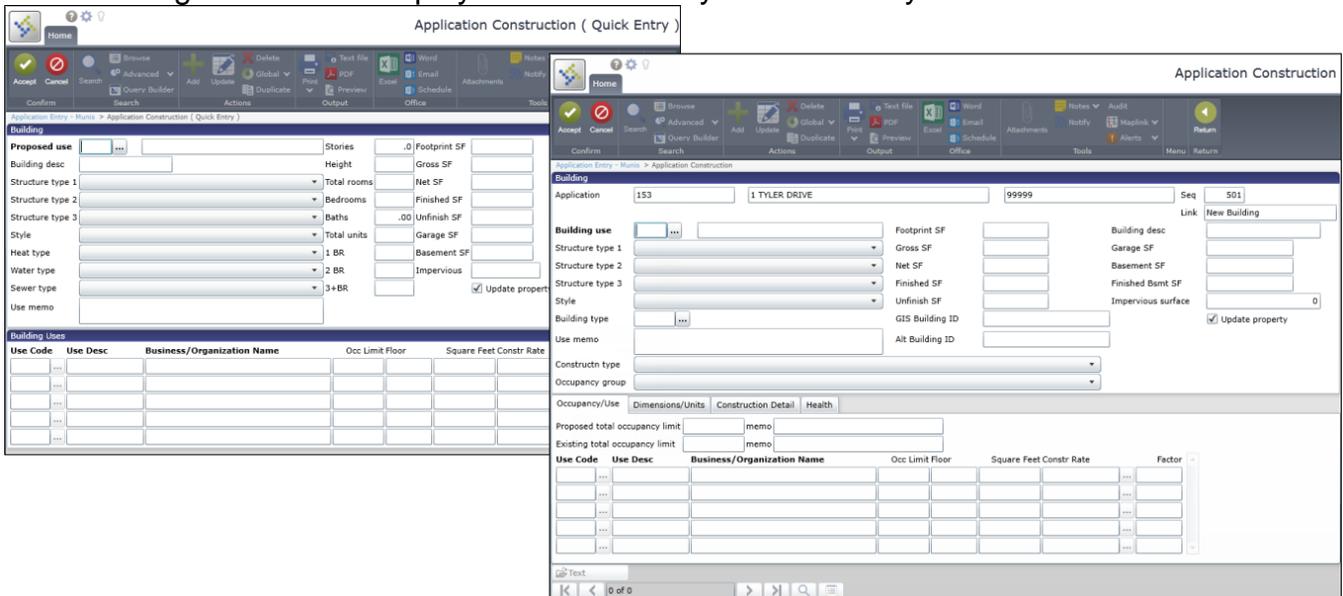


When you use allowable inspection types, the main screen of Inspection Entry and the Add Multiple screen (accessible through the Inspection Scheduling option) limit the inspection types to only the allowable inspection types for the permit type. If the inspection is not linked to a permit application,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

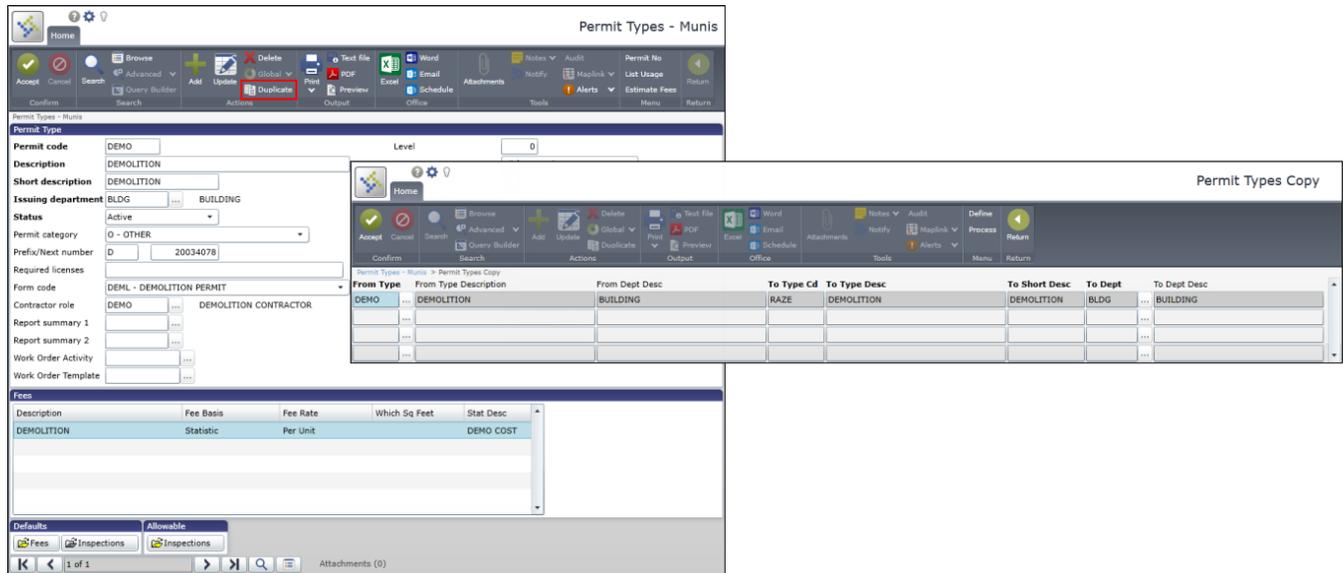


The following screen shot displays the Quick Entry and Full Entry screens:



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.



The screenshot shows the 'Permit Types Copy' screen. The main table contains 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 'Fees' section contains the following table:

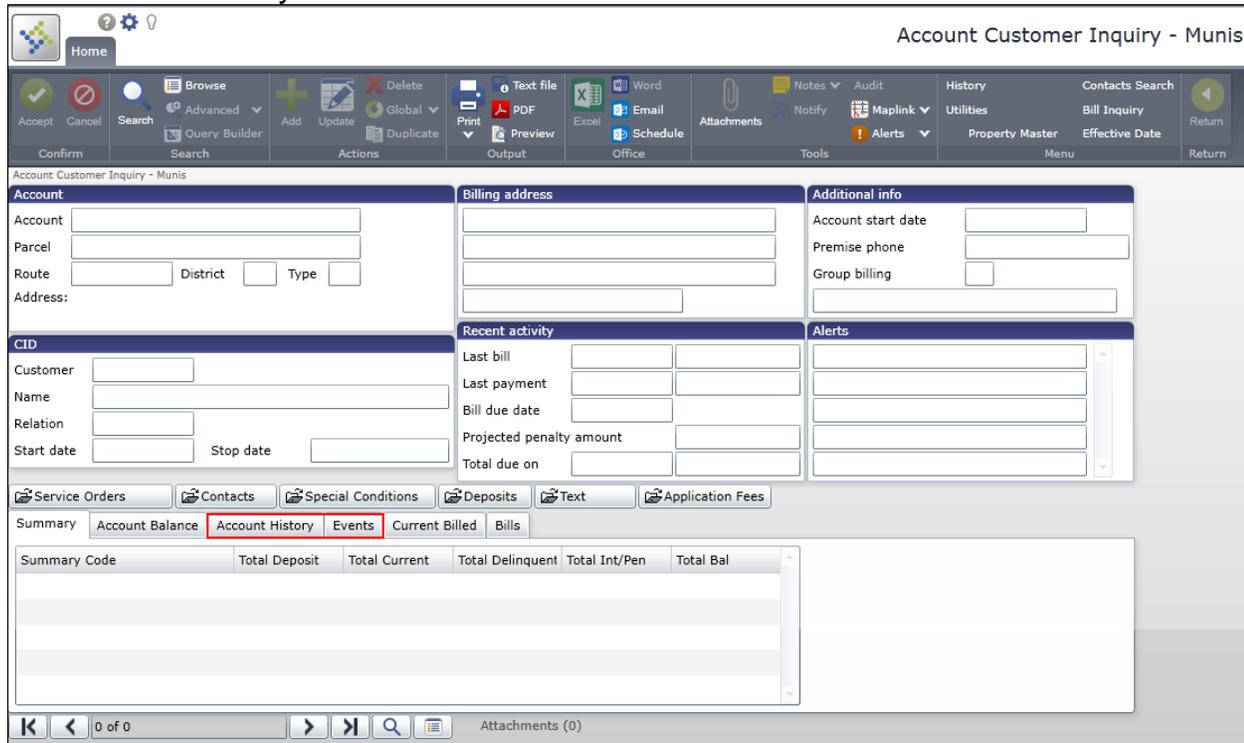
Description	Fee Basis	Fee Rate	Which Sq Feet	Stat Desc
DEMOLITION	Statistic	Per Unit		DEMO COST

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
02/09/2011							
07/31/2007				345.17		1058	
03/15/2007				10240.81		Multiple	
02/28/2007				50.00			
10/16/2006				-3631.84			
10/01/2006				35680.37		Multiple	
06/15/2006				5157.47		Multiple	
05/15/2006				4932.91		Multiple	
04/15/2006				5193.75		Multiple	
03/28/2006				144.10			
03/15/2006				5191.98		Multiple	

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.

Home
Aging Report - Munis

Execute this report: [Dropdown]

Selection criteria

Bill date: 12/09/2013 to 01/08/2014

Account: [Blank] to ZZZZZZZZZZZZZZZZZZZZ

Customer: 0 to 999999999

ROUTE: [Blank] to ZZZZZZ

Include charge codes

From	To
	ZZZZZZ

Include rate codes

From	To
	ZZZZ

Include account types

From	To
	ZZ

Include

Services - general

Services - electric

Assessments

Installments

Inactive only

Active only

Stopped accounts only

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

Options

Aging as of date 01/08/2014

Activity through date 01/08/2014

Minimum balance .00

Calculate interest

Acct/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

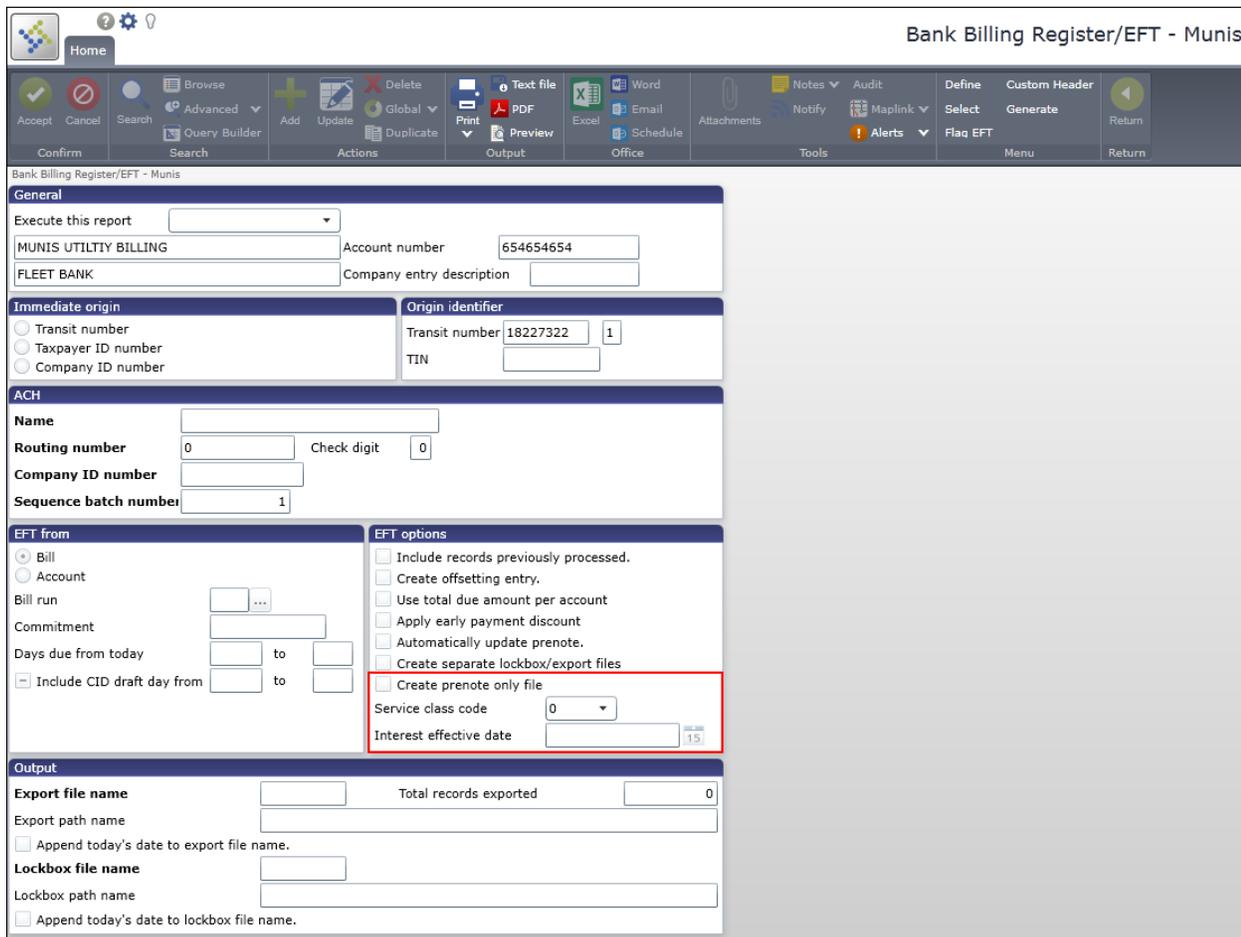
Location

Group/route

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.



Bank Billing Register/EFT - Munis

General

Execute this report: [Dropdown]

MUNIS UTILITY BILLING Account number: 654654654

FLEET BANK Company entry description: [Field]

Immediate origin

Transit number [Radio]

Taxpayer ID number [Radio]

Company ID number [Radio]

Origin identifier

Transit number: 18227322 1

TIN: [Field]

ACH

Name: [Field]

Routing number: 0 Check digit: 0

Company ID number: [Field]

Sequence batch number: 1

EFT from

Bill [Radio]

Account [Radio]

Bill run: [Field] ...

Commitment: [Field]

Days due from today: [Field] to [Field]

Include CID draft day from [Field] to [Field]

EFT 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: 0

Interest effective date: .15

Output

Export file name: [Field] Total records exported: 0

Export path name: [Field]

Append today's date to export file name.

Lockbox file name: [Field]

Lockbox path name: [Field]

Append today's date to lockbox file name.

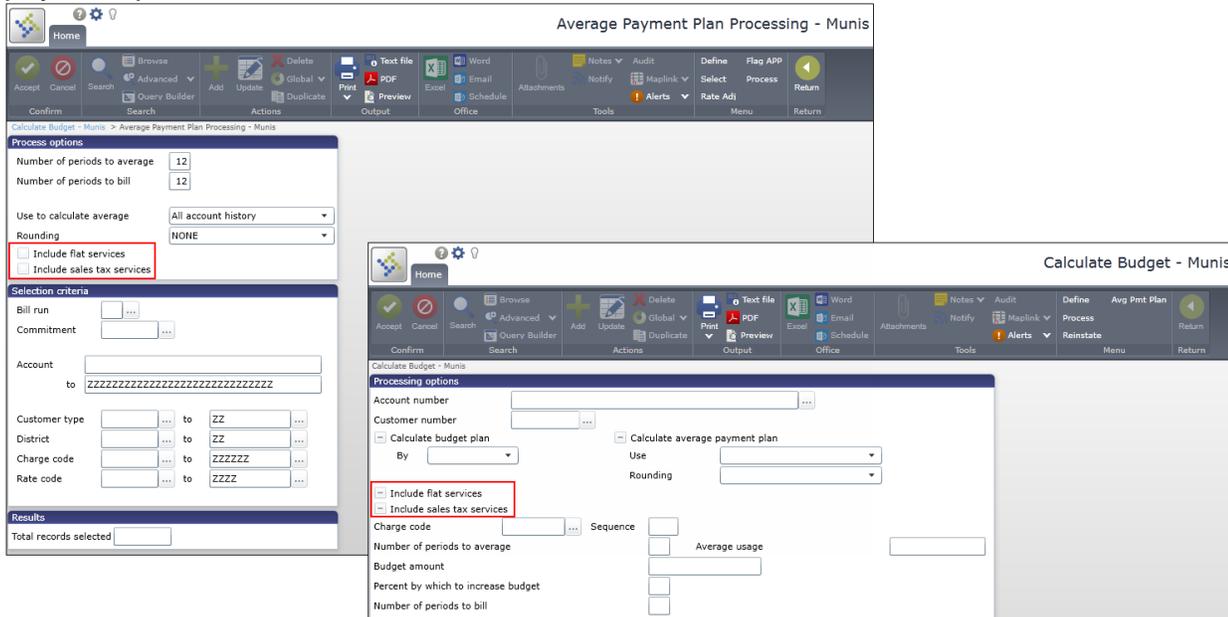
The Create Prenote Only File check box in the EFT Options group allows you to create an EFT prenote outside of the bill run process.

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.



The top screenshot, titled "Average Payment Plan Processing - Munis", shows the "Process options" section. It includes fields for "Number of periods to average" (12) and "Number of periods to bill" (12). Under "Use to calculate average", it is set to "All account history". The "Rounding" is set to "NONE". Two checkboxes are highlighted with red boxes: "Include flat services" and "Include sales tax services".

The bottom screenshot, titled "Calculate Budget - Munis", shows the "Processing options" section. It includes fields for "Account number", "Customer number", "By" (dropdown), "Use" (dropdown), and "Rounding" (dropdown). Two checkboxes are highlighted with red boxes: "Include flat services" and "Include sales tax services". Below these are fields for "Charge code", "Sequence", "Number of periods to average", "Budget amount", "Percent by which to increase budget", and "Number of periods to bill".

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

Home

Accept Cancel Search Advanced Query Builder Add Update Duplicate Print PDF Preview Excel Word Email Attachments Notify Alerts Define Report Output Generate Retain Lines Flag Cutoff More... Return

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

Past due

Initial cutoff selection
 Include miscellaneous charges
 Include interest in minimum/calculations

Minimum interest: Minimum by:

Charges

Create additional deposits
 Use subject to fee codes

Fee year:

Fee charge code:

Calculation code:

Fee amount/%:

Selection criteria

Bill run: Commit:

ROUTE: to

Account: to

Account type: to

District: to

Owner responsible for tenant-occupied

Include charge codes

From	To
	ZZZZZZ

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:

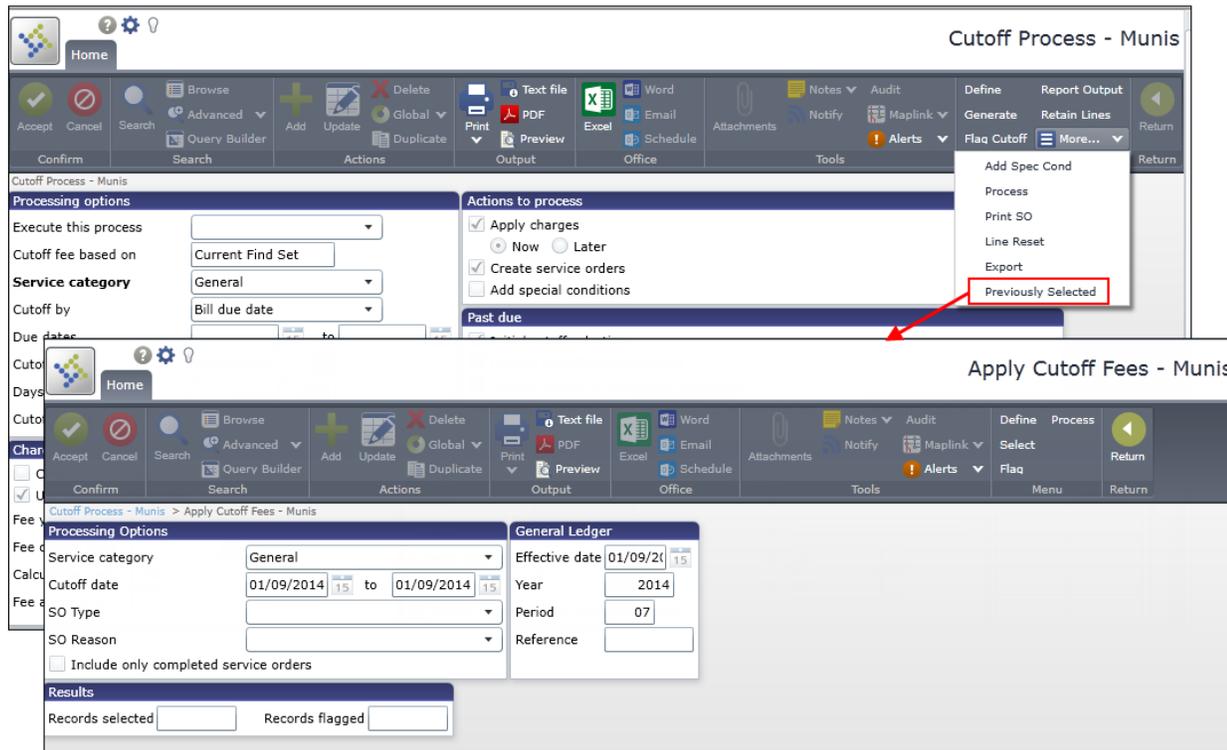
Output:

Print user defined field:

Results

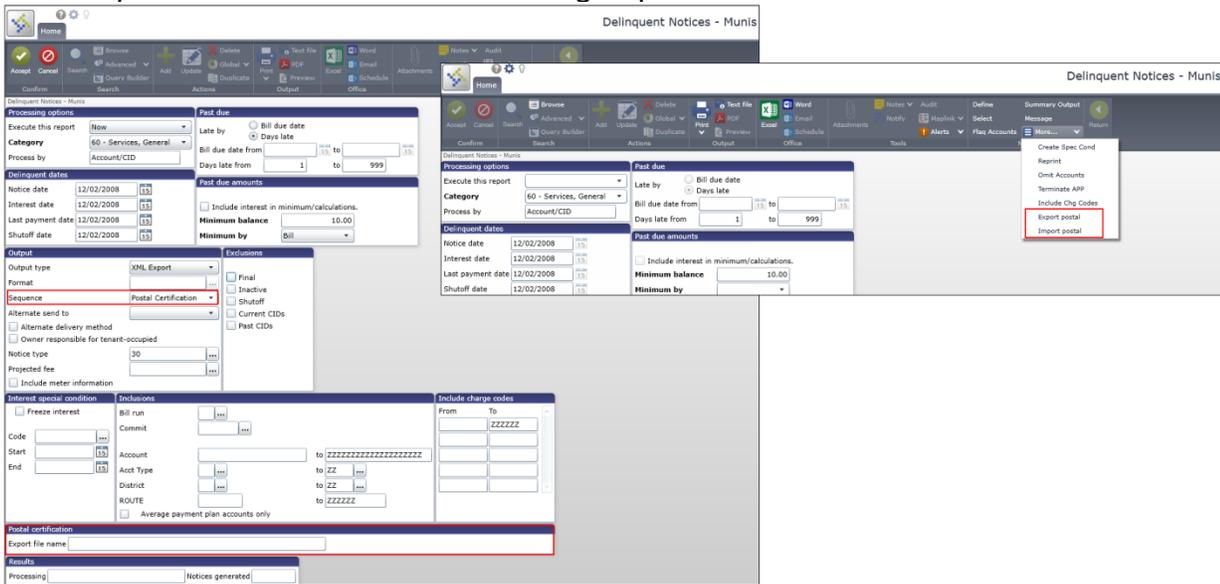
Records selected: Records flagged:

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.

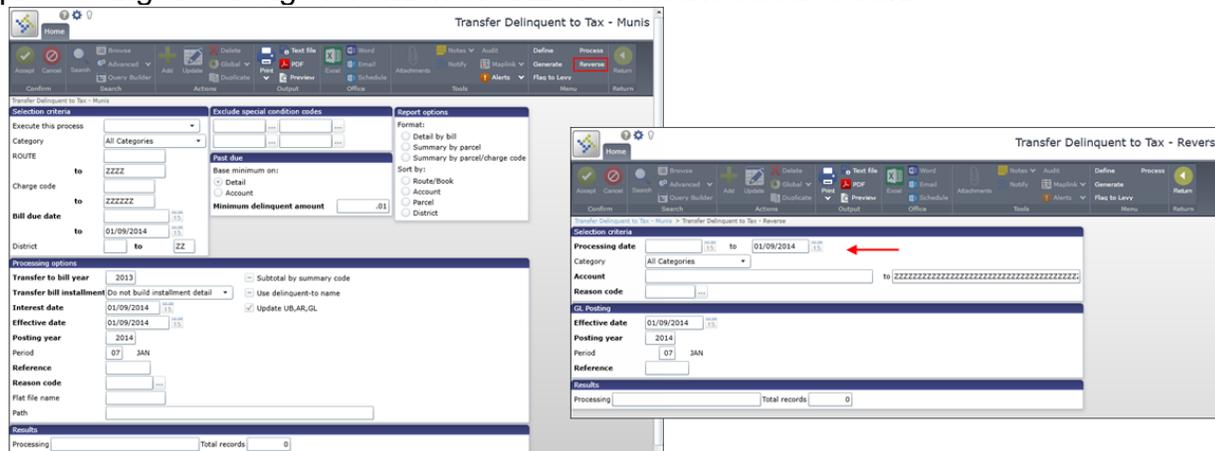


After the Select step is complete, click Export Postal to export a flat file to the spool directory. Enter a file name in the Export File Name box in the Postal Certification group and click Accept to create the file. Once the file is stored on the spool directory, the program displays a query box that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



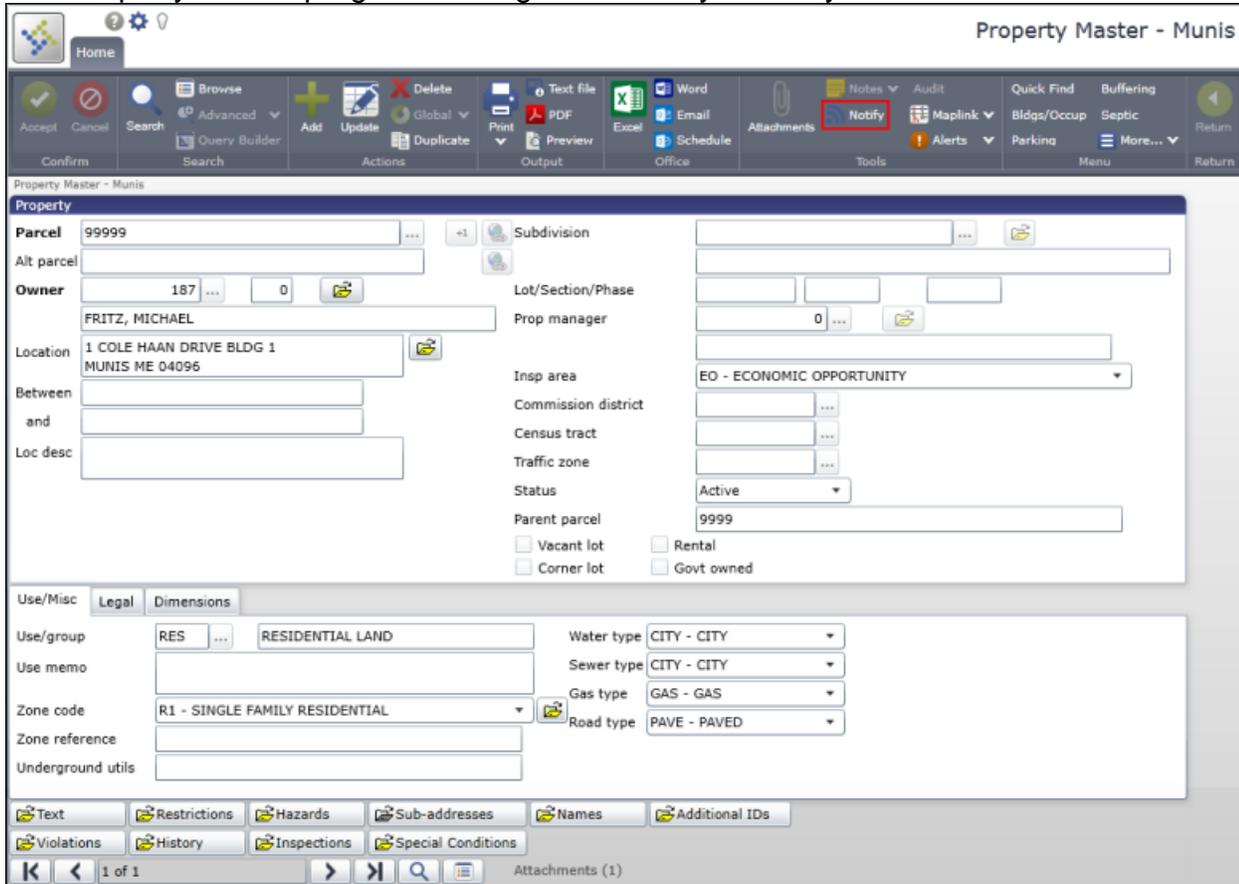
When you generate the reversal, use the Flag to Levy option to identify each account to which the reversal applies. Click Process to complete the reversal.

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.

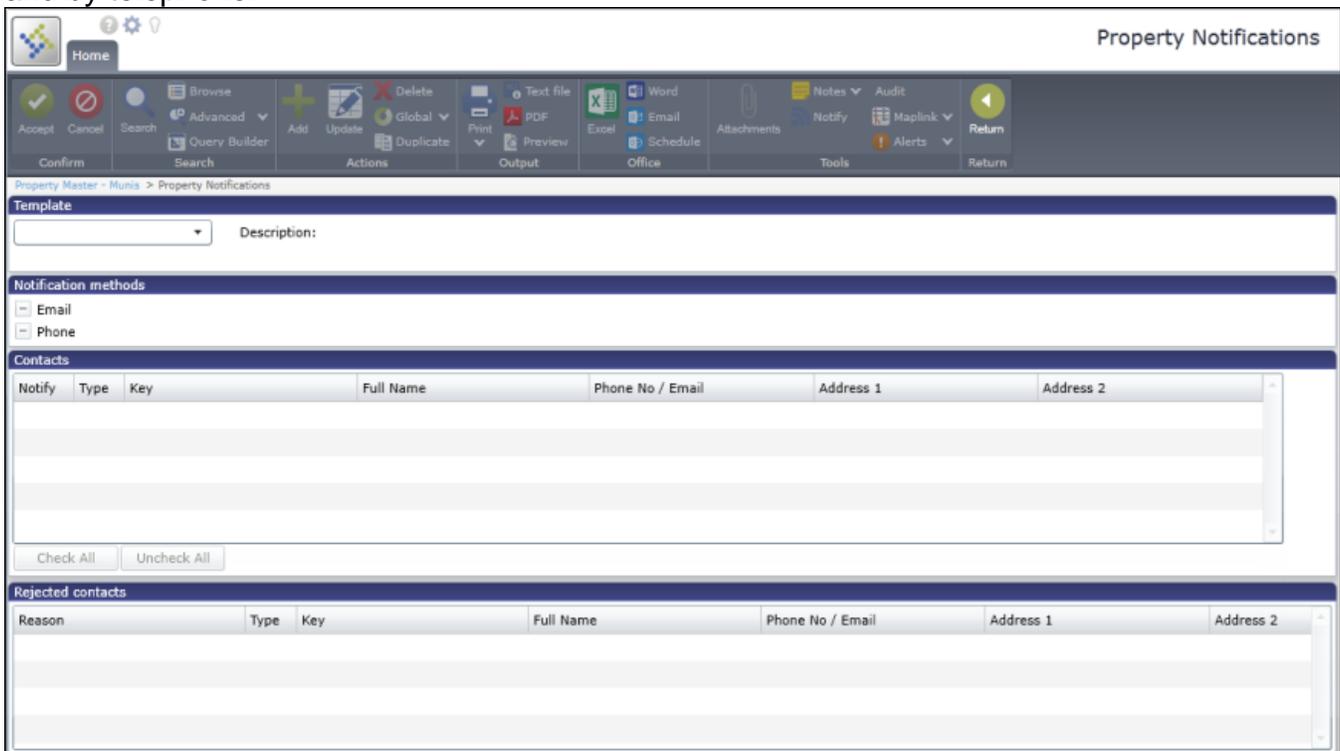
The Property Master program is integrated with Tyler Notify.



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

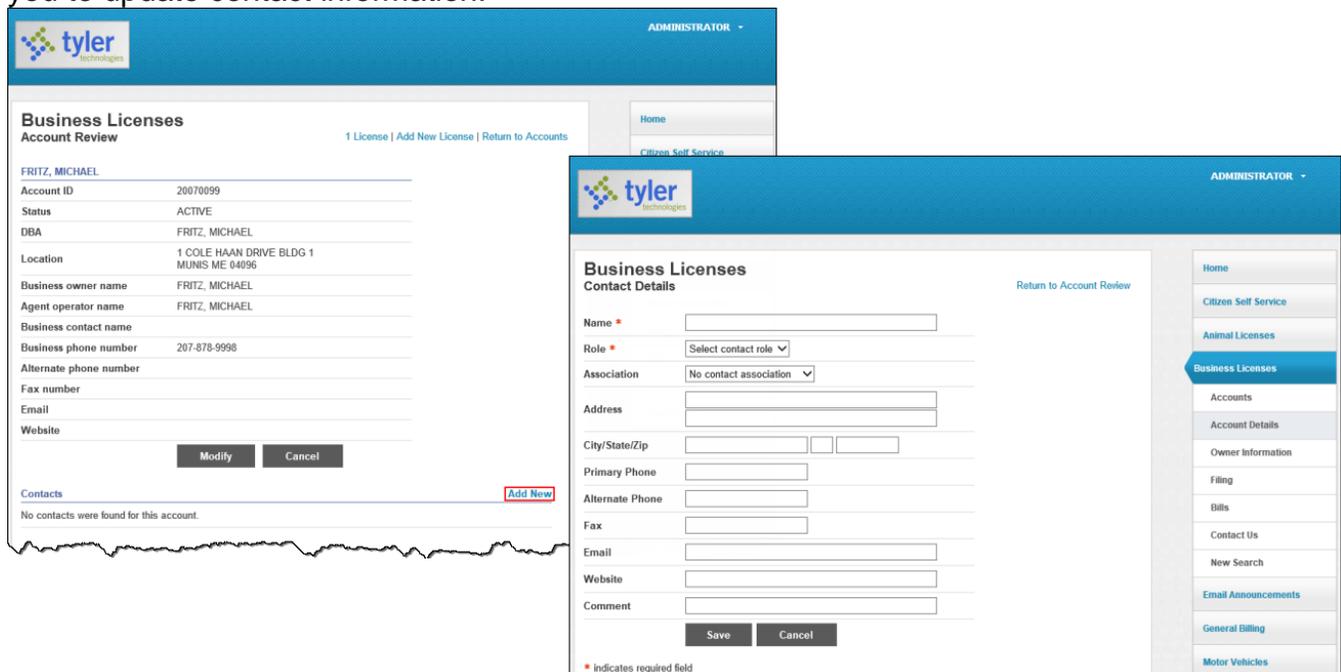
Module	Field Name	Description
Permits and Code Enforcement		
		<p>The Permits and Code Enforcement Roles screen is reorganized to include the Permit Applications/Contractors, Inspections/Violations, and Collections/Others tabs, in addition to the Property Role Permissions tab.</p> <p>The Permit Applications/Contractors 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.

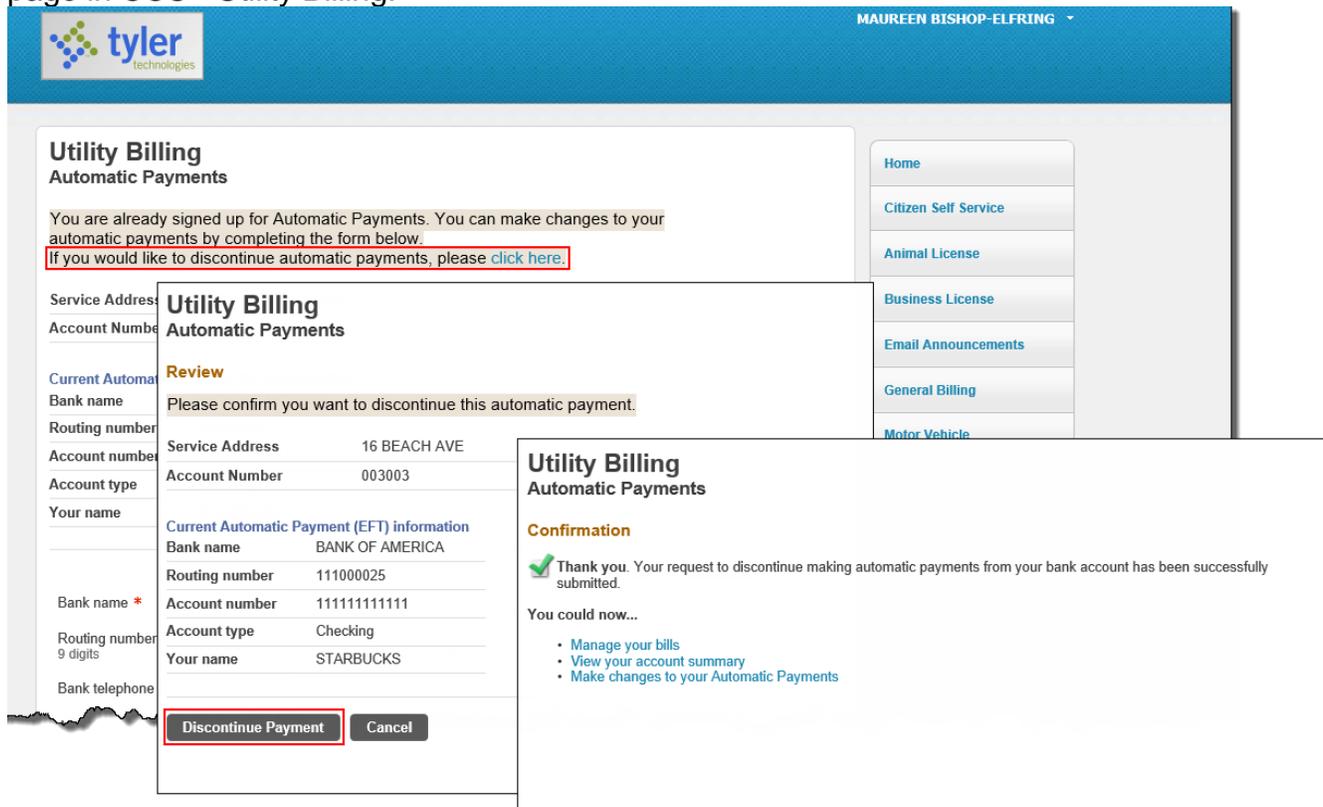
Business Licenses

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 interface for 'Utility Billing Automatic Payments'. At the top, the user is identified as MAUREEN BISHOP-ELFRING. The page title is 'Utility Billing Automatic Payments'. A message states: '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 [click here](#).' Below this, there are two overlapping windows. The first window, titled 'Utility Billing Automatic Payments', shows a 'Review' section with the text: 'Please confirm you want to discontinue this automatic payment.' It lists current automatic payment details: Service Address (16 BEACH AVE), Account Number (003003), Bank name (BANK OF AMERICA), Routing number (111000025), Account number (11111111111), Account type (Checking), and Your name (STARBUCKS). At the bottom of this window are 'Discontinue Payment' and 'Cancel' buttons. The second window, also titled 'Utility Billing Automatic Payments', shows a 'Confirmation' message: 'Thank you. Your request to discontinue making automatic payments from your bank account has been successfully submitted.' Below the confirmation, it says 'You could now...' followed by a list of links: 'Manage your bills', 'View your account summary', and 'Make changes to your Automatic Payments'.

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.