Munis Revenues

Major Enhancements for Version 10.2 Revenues
Spetember 7, 2012

For more information, visit www.tylertech.com.

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Munis Revenues

This document provides an overview of the major Revenues enhancements for Munis® Version 10.2. Revenues programs include Citizen Self Service (CSS) and central programs.

The Munis Revenues product contains General Revenues and Property Revenues:

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

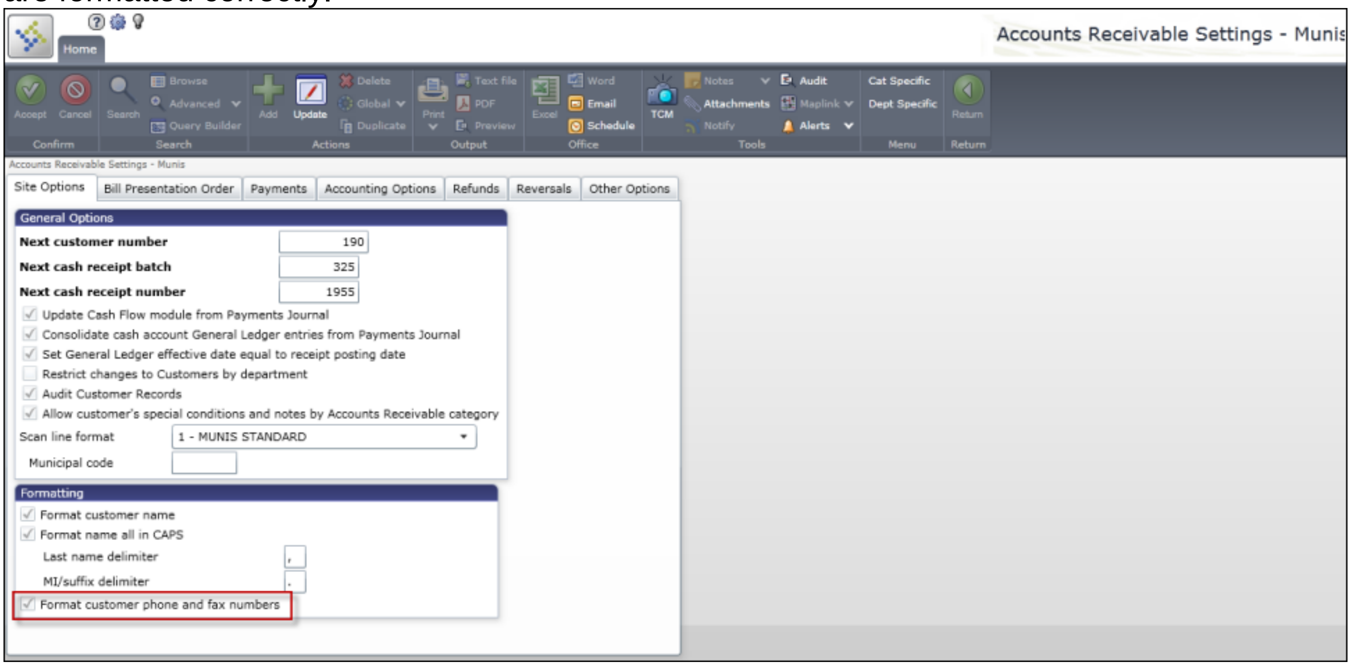
Please refer to the Version 10.2 Munis Release Notes on the Munis Knowledgebase (http://muniskb.tylertech.com/search.aspx) for information regarding state-specific updates and all other changes not covered in this document.

Accounts Receivable

The following changes apply to Munis Accounts Receivable programs.

Accounts Receivable Settings, Customers

The Format Customer Phone and Fax Numbers check box is available on the Site Options tab of the Accounts Receivable Settings program. This check box, if selected, causes the Customers program to open the Telephone Number Entry or Fax Number Entry dialog boxes when you access the Telephone Number or Fax Number boxes on the Contact Information tab. The Telephone Number Entry and Fax Number Entry dialog boxes ensure that numbers are formatted correctly.



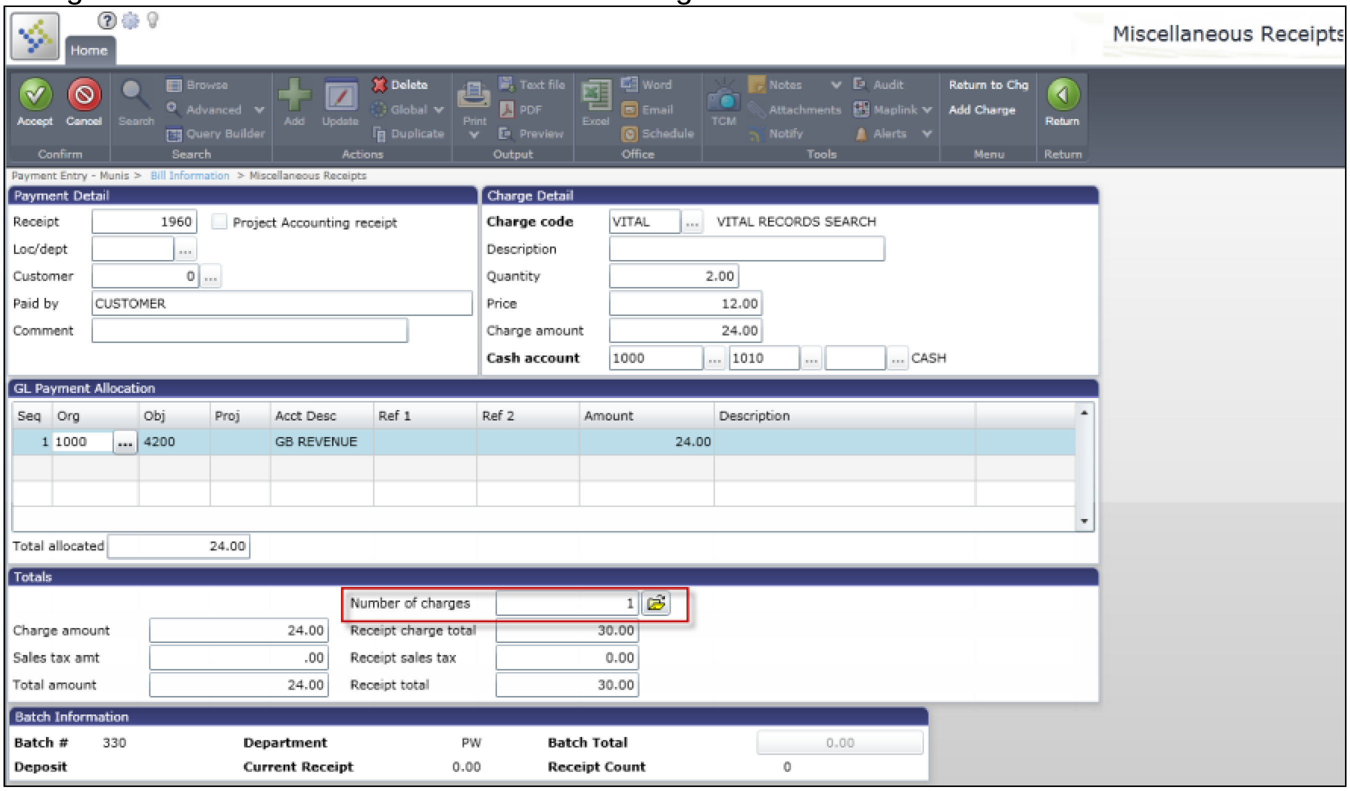
Payment Entry

Miscellaneous Cash Receipts

In the Roles program, the Accounts Receivable permission for Access to GL Accounts on Miscellaneous Payments has three options: Allow, Allow Non-Cash Accounts Only, and Disallow.

- Allow permission provides access to the Cash Account and General Ledger accounts for updates.
- Allow Non-Cash Accounts Only provides access to the General Ledger Accounts for updates.
- Disallow does not provide access to the Cash Account or General Ledger Accounts for updates.

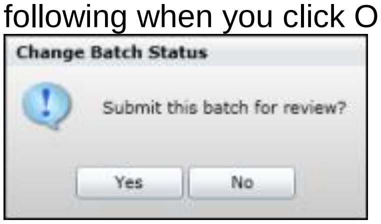
The button for the Number of Charges box in the Totals group of the miscellaneous cash receipt indicates the number of charges on the current receipts. When you click the button, the program displays the Charges on Current Receipt screen where you can view or delete charges from the current batch without canceling the entire transaction.



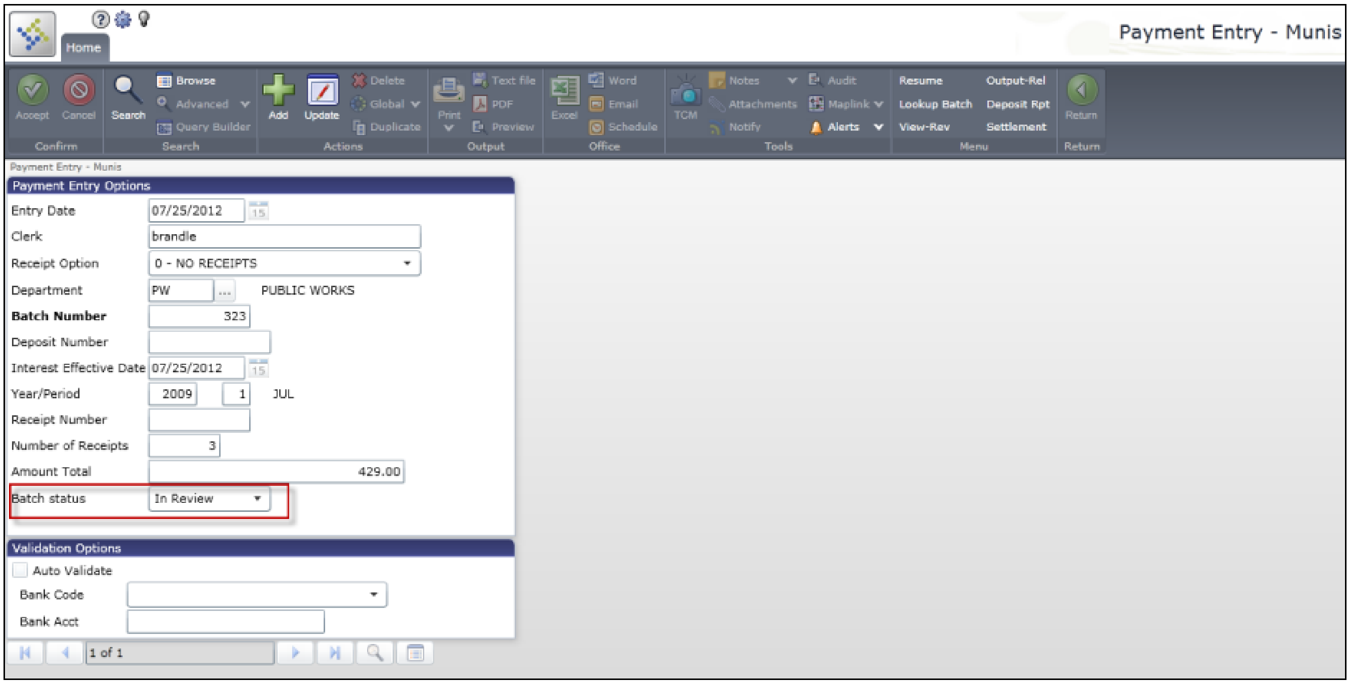
Payment Batch Release Options

The Batch Posting Permission Level list in Roles - Accounts Receivable determines if your payment batch status is Released or In Review. Batches that have In Review status are not able to be posted in Payments Journal. If your batch posting permission level is Released, you can change other users' pending batches from In Review to Released by clicking Output-Rel.

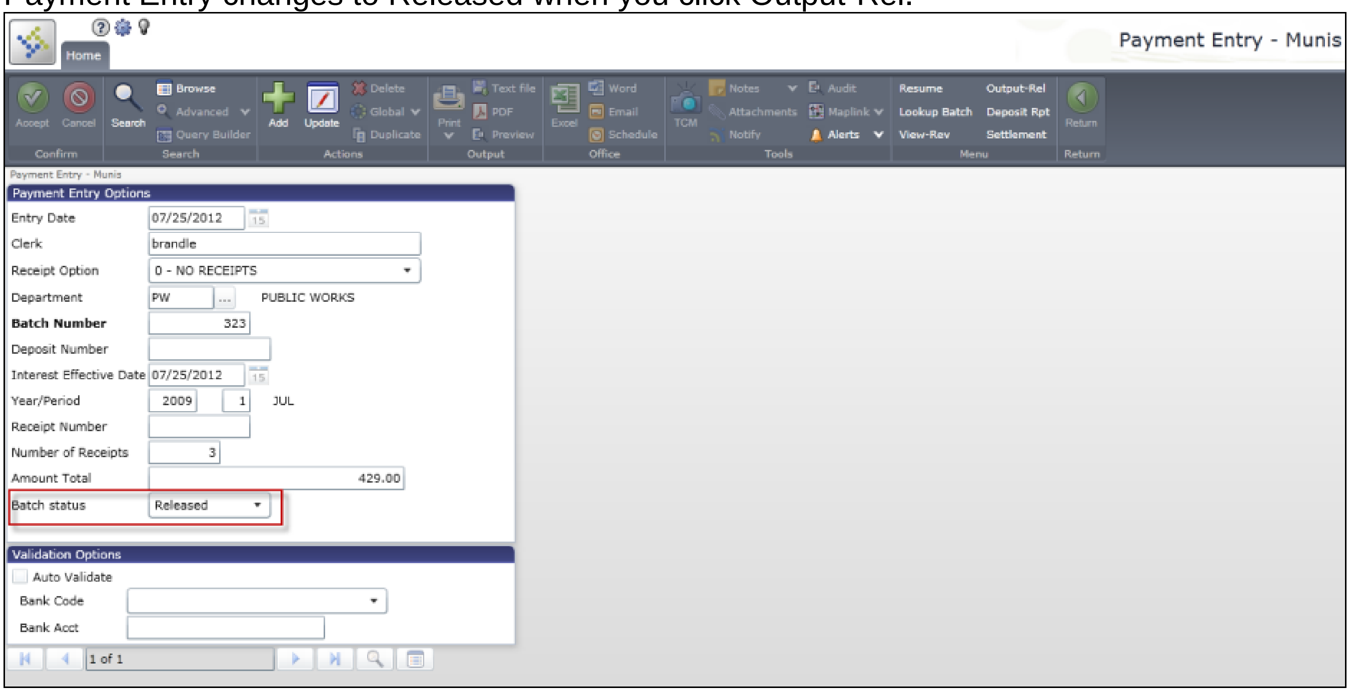
If your Accounts Receivable batch posting permission is In Review, the program displays the following when you click Output-Rel.



Click Yes and the Batch Status changes to In Review in the Payment Entry program.

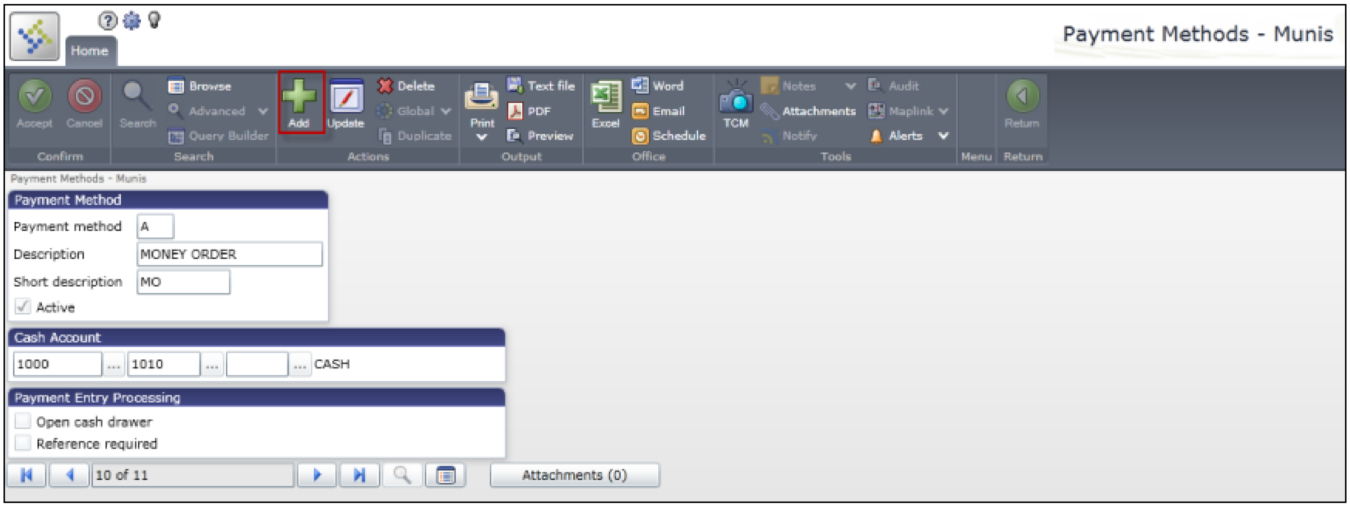


If your Accounts Receivable batch posting permission is Released, the batch status in Payment Entry changes to Released when you click Output-Rel.

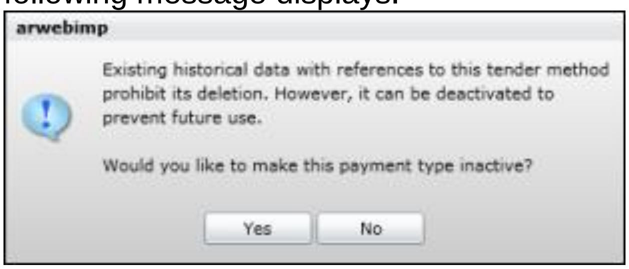


Payment Methods

Payment Methods allows the addition of user-defined payment types, such as Money Order or Debit Card. The payment method identifier must be a nonnumeric character (for example, a symbol or alpha character). The original nine payment methods cannot be updated or removed.



A user-defined payment method can be made inactive, but cannot be removed. If you attempt to delete a user-defined payment method that has been used in a payment transaction, the following message displays.



Business Licenses

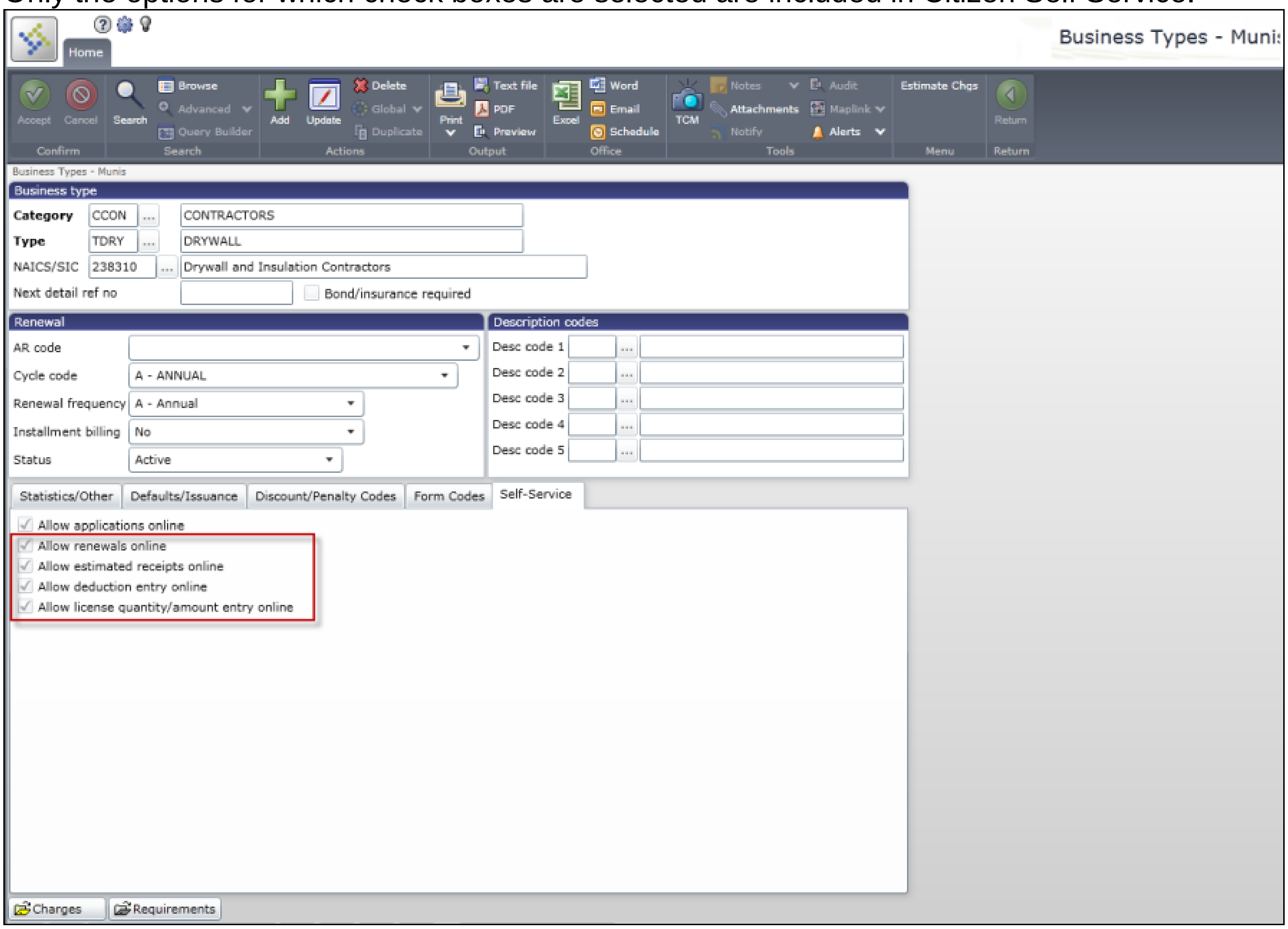
The following changes apply to Munis Business Licenses programs.

Business Types

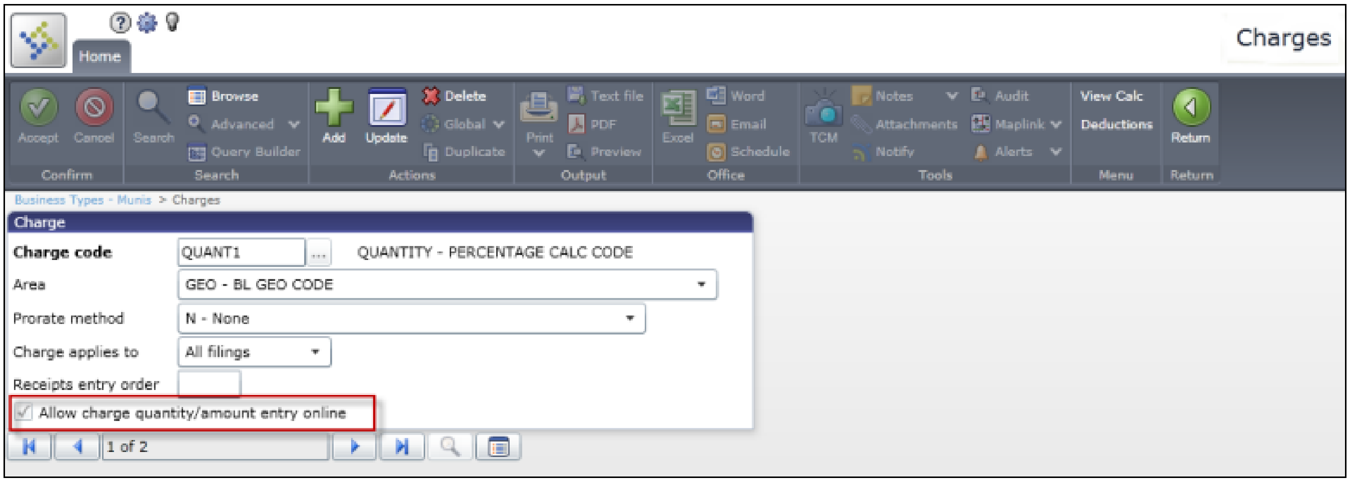
The following check boxes are available for Licenses on the Self-Service tab in Business Types for use in Citizens Self Service (CSS):

- Allow Renewals Online
- Allow Estimated Receipts Online
- Allow Deduction Entry Online
- Allow License Quantity/Amount Entry Online

Only the options for which check boxes are selected are included in Citizen Self Service.



The Allow License Quantity/Amount Entry Online check box on the Self-Service tab in Business Types allows customers to enter a quantity/statistic amount when adding a new license using Citizen Self Service. The Allow Charge Quantity/Amount Entry Online check box on the Charges screen allows customers to enter the quantity amount when filing a license in Citizen Self Service.

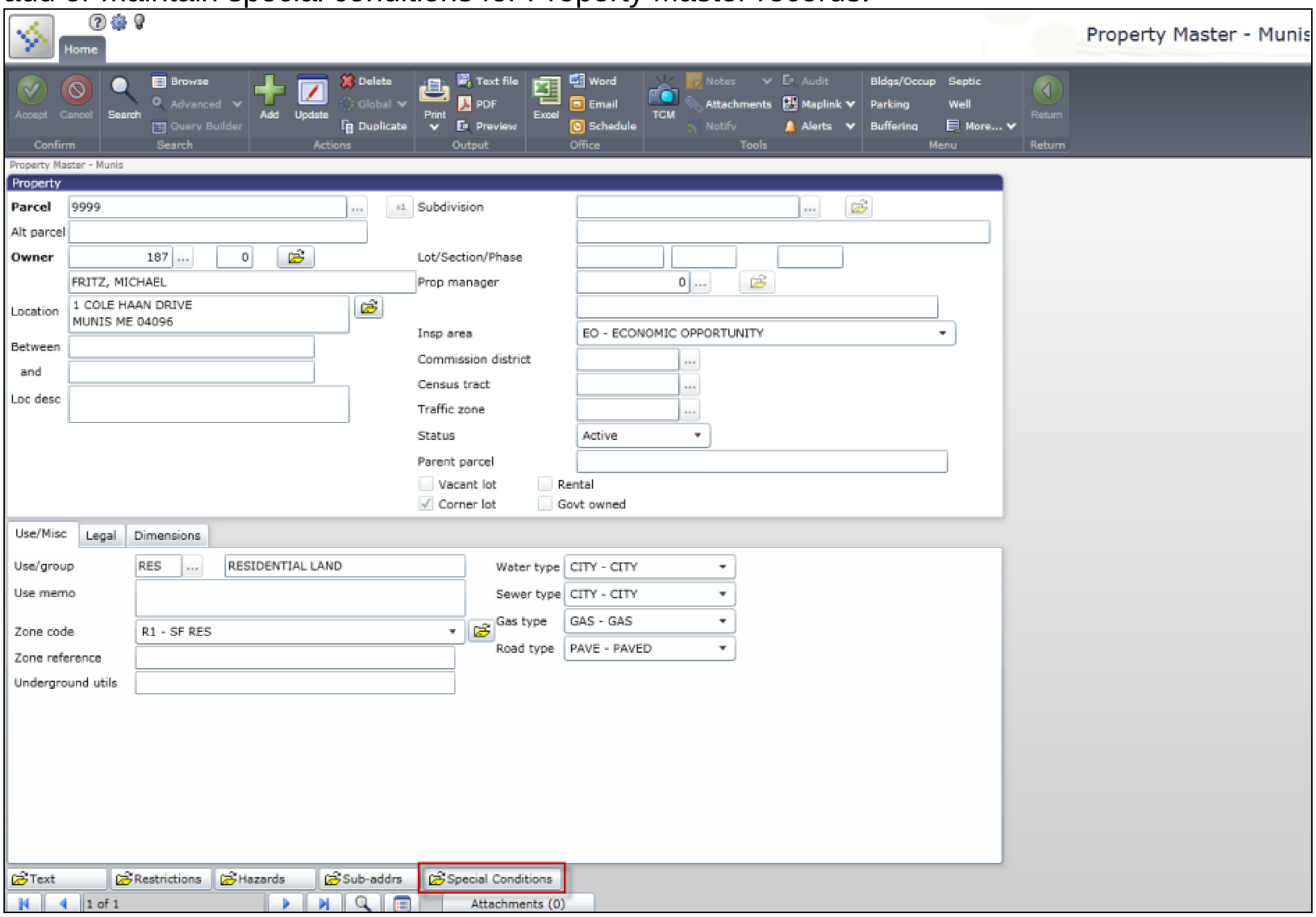

Charges
Home
Accept
Cancel
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Print
Text file
PDF
Preview
Excel
Word
Email
Schedule
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
View Calc
Deductions
Return
Confirm
Search
Actions
Output
Office
Tools
Menu
Return
Business Types - Munis > Charges
Charge
Charge code
QUANT1
QUANTITY - PERCENTAGE CALC CODE
Area
GEO - BL GEO CODE
Prorate method
N - None
Charge applies to
All filings
Receipts entry order
Allow charge quantity/amount entry online
1 of 2

Central Property

The following changes apply to Munis Central Property programs.

Property Master

The Special Conditions button opens the Special Conditions/Notes program, allowing you to add or maintain special conditions for Property Master records.

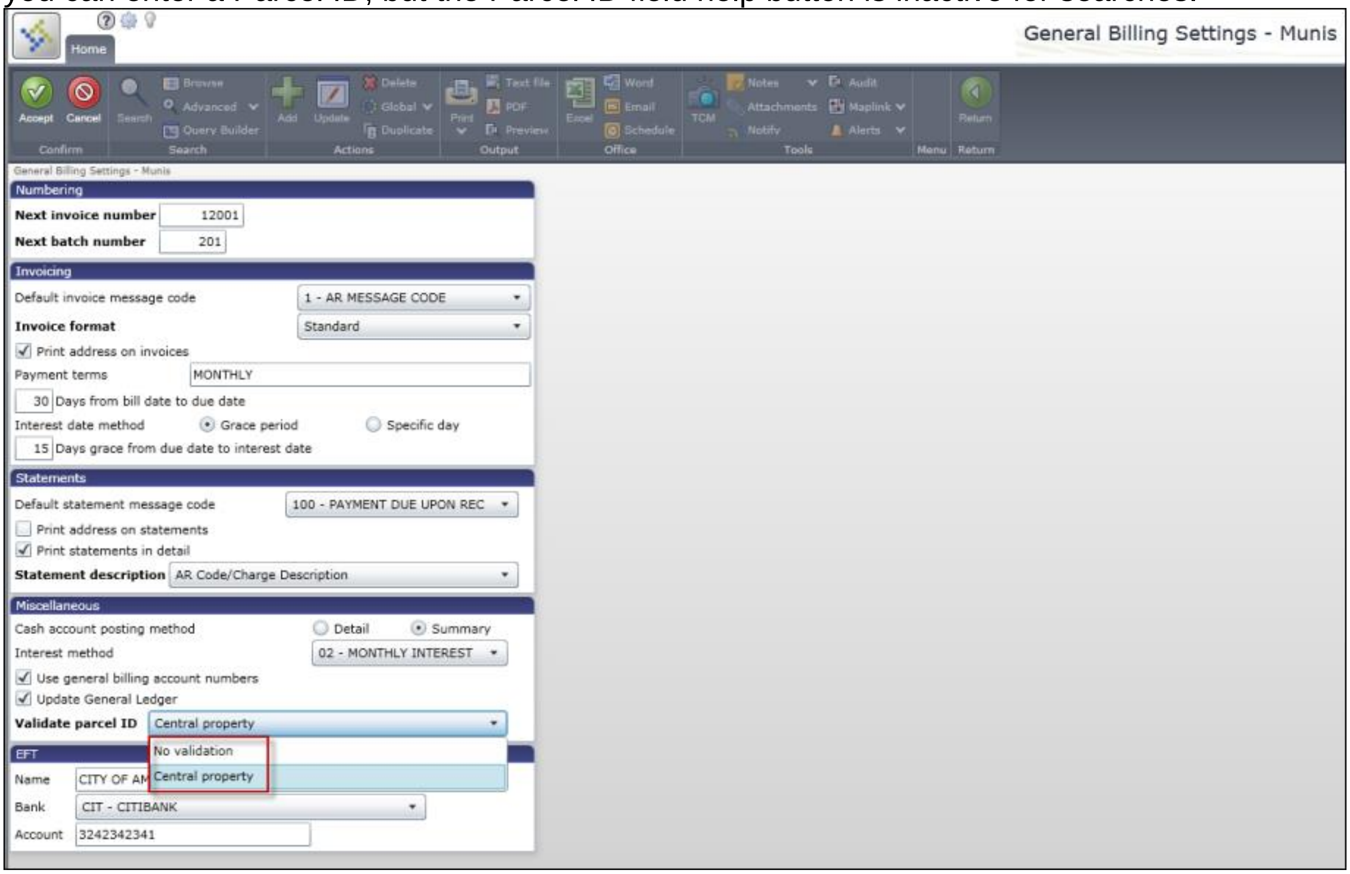


General Billing Enhancements

The following changes apply to Munis General Billing programs.

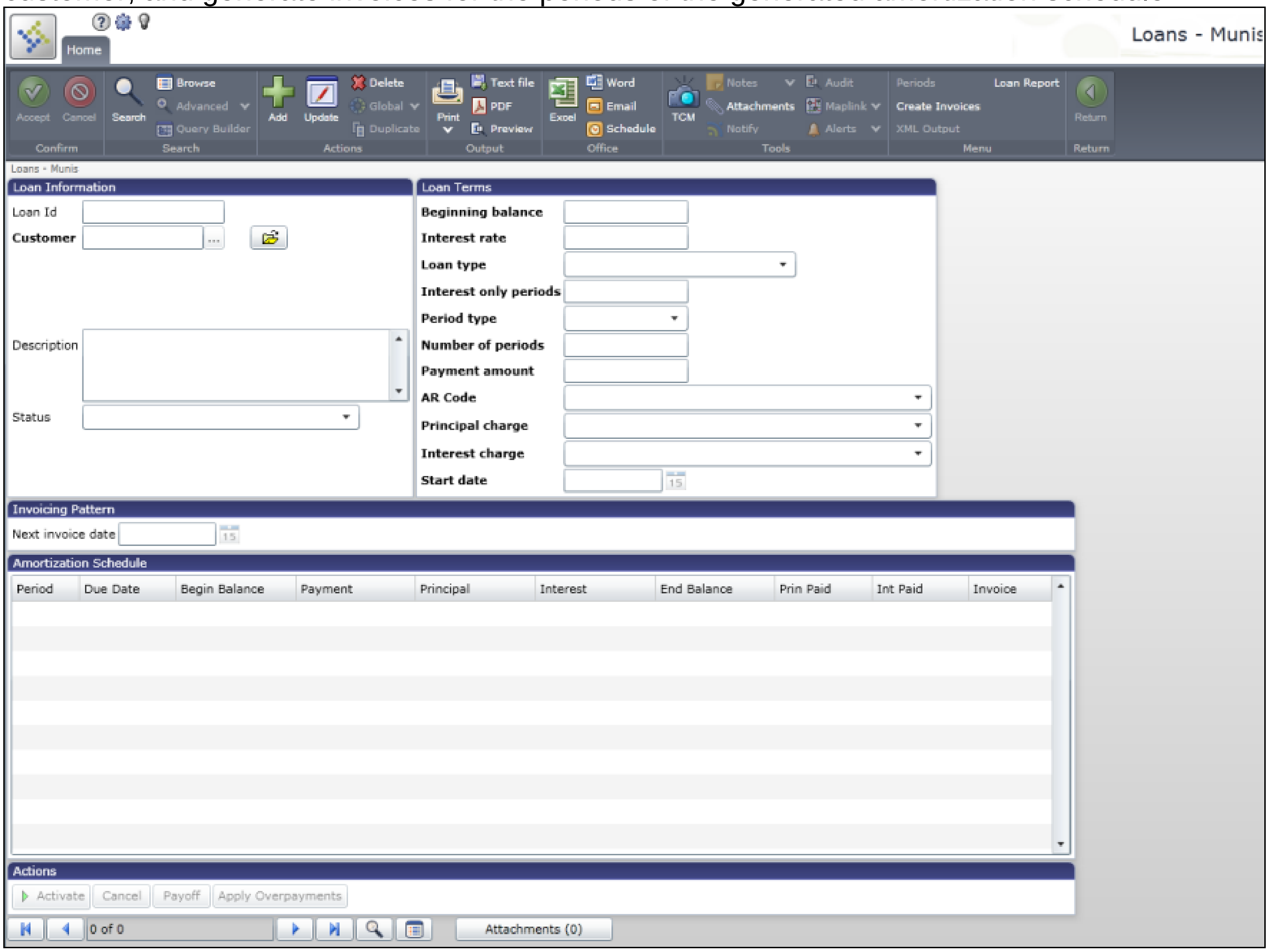
General Billing Settings

General Billing Settings includes a Validate Parcel ID setting for Central Property. When Central Property is selected, the Parcel field help button in Invoice Entry and Proof, Invoice Inquiry, and Invoices allows you to search for Parcel IDs. If No Validation is selected, you can enter a Parcel ID, but the Parcel ID field help button is inactive for searches.

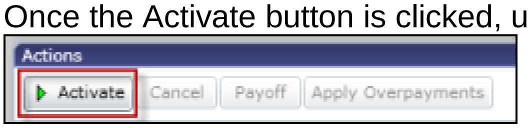


Loans

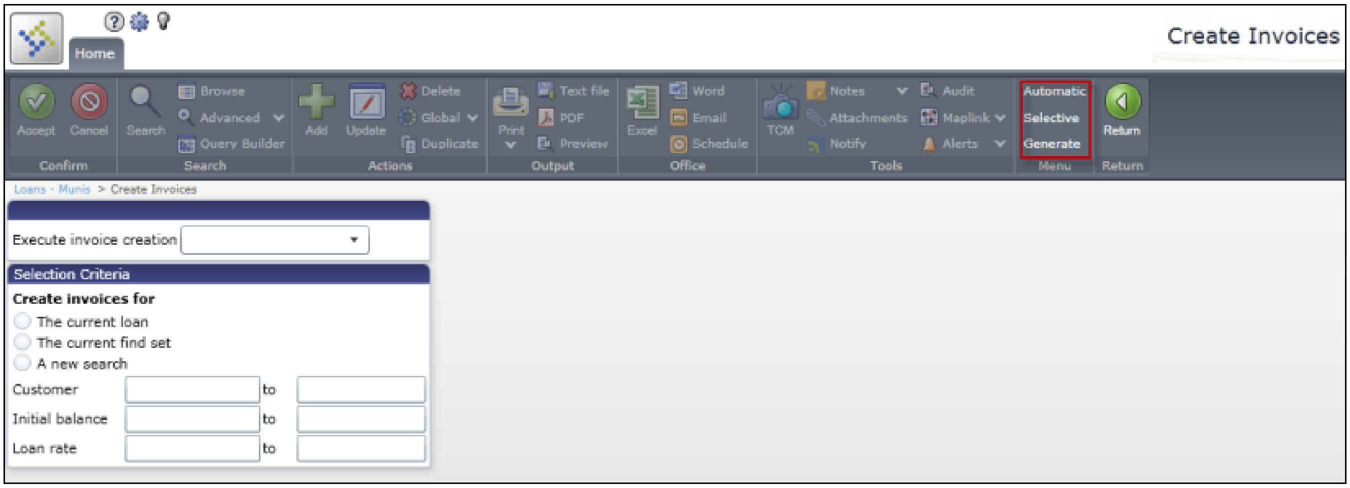
The Loans program allows you to define values for loan terms, associate the loan with a customer, and generate invoices for the periods of the generated amortization schedule.



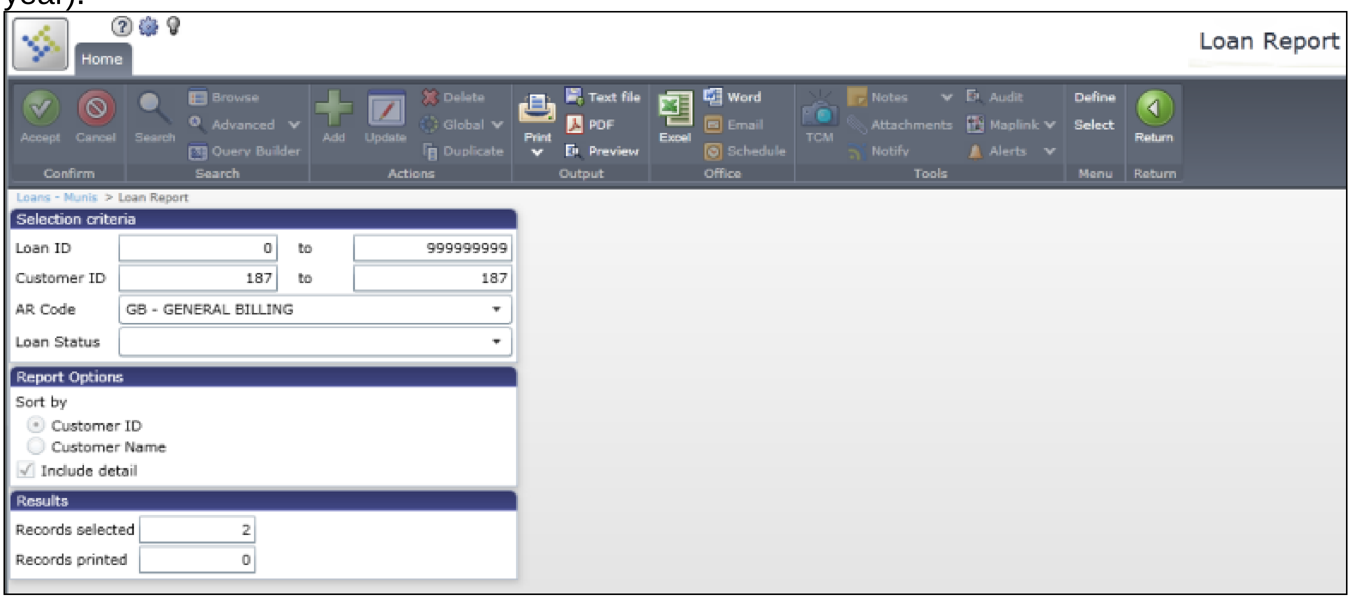
Once the Activate button is clicked, updates to the loan are not permitted.



Create Invoices generates the invoices for the amortization schedule. Invoices are created by an automatic process using Munis Scheduler or a selective process using the Selection Criteria values. In either case, only periods requiring invoice creation will generate invoices. When the records are selected, clicking Generate sends the records to Invoice Entry and Proof to be posted.



The Loan Report produces a list of loans with the following items: Borrower, Original Loan Date, Original Loan Amount, Principal Paid, Interest Paid, Current Loan Balance, Paid Through Date, Maturity Date, Billed Amount, Current Amount Due, Past Due Amount, Total Amount Due, Last Payment Date, Next Due Date, and Interest Paid Year-to-Date (calendar year).



Permits and Code Enforcement

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

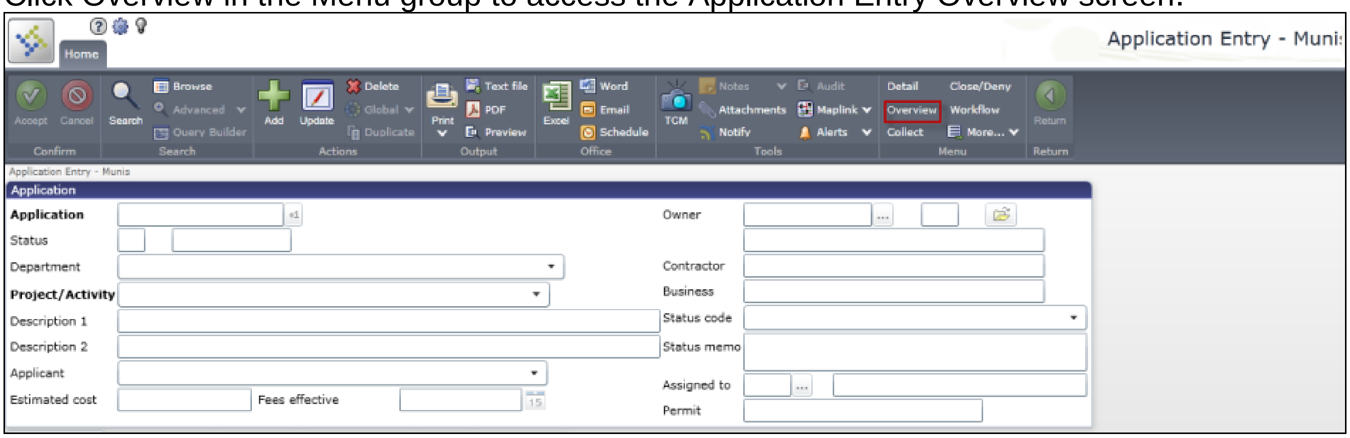
Application Entry, Project Types

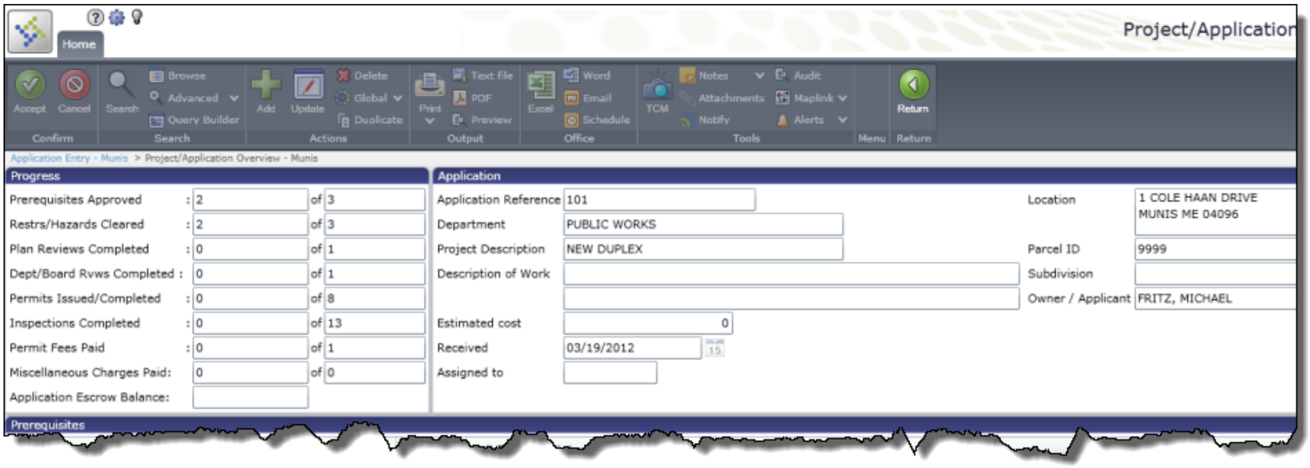
An Overview button is available in the Application Entry and Project Types programs.

The Application Entry Overview screen shows some basic information about the permit application, a progress area that shows counts of items on the applications, and a list of Permit Application programs that contain multiple items:

- Prerequisites Approved
- Restrictions/Hazards Cleared
- Plan Reviews Completed
- Department/Board Reviews Completed
- Permits Issued/Completed
- Inspections Completed
- Permit Fees Paid
- Miscellaneous Charges Paid
- Application Escrow Balance

Click Overview in the Menu group to access the Application Entry Overview screen.





The Project Types Overview screen has basic information about the project type, counts of items on the project, and a list for each counted item.

The following sections provide item counts:

- Total number of default prerequisites
- Total number of default permits
- Total number of default inspections
- Total number of default department/board reviews
- Total number of default plan reviews
- Total number of default GIS query layers

The following buttons are available in the Project/Application Type Overview, allowing access to the default records for each button:

- Prerequisites
- Permits
- Inspections
- Dept/Board of Reviews
- Plan Reviews
- GIS Layers

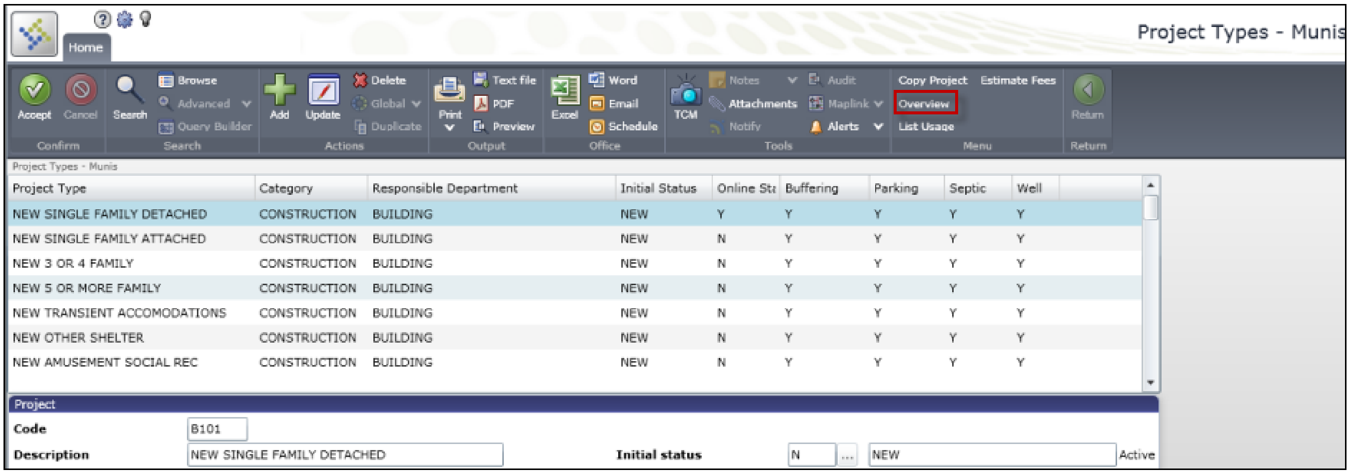
The following buttons estimate the permit fees for the project type and list the Application reference numbers where the project type is used:

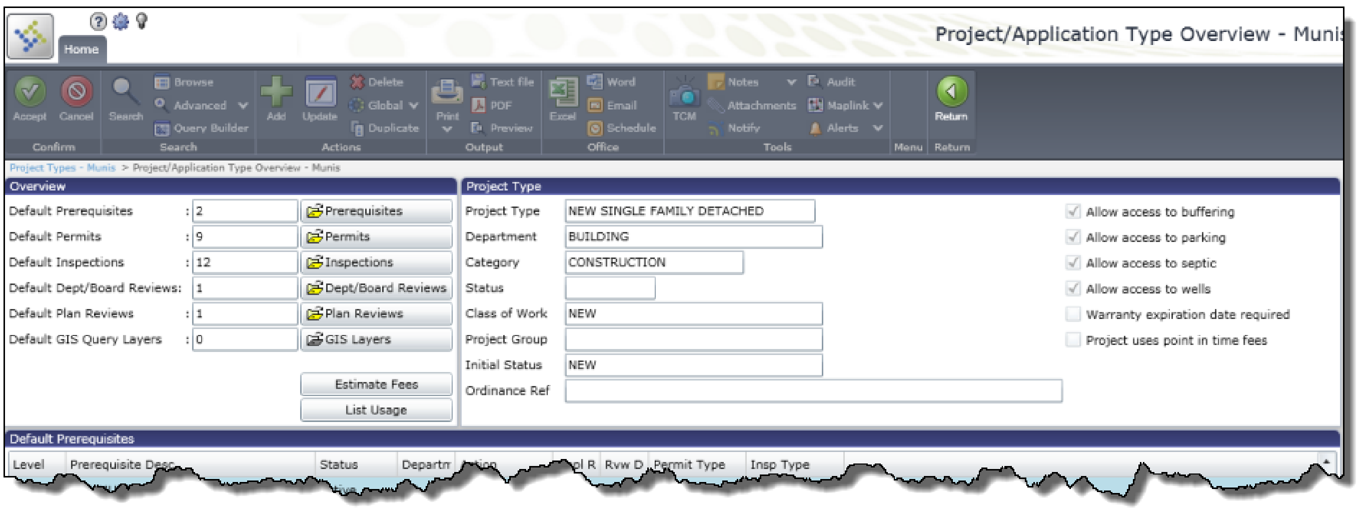
- Estimate Fees
- List Usage

The following buttons provide views of the associated programs:

- View Prerequisite
- View Permit
- View Inspection
- View Dept/Board Master

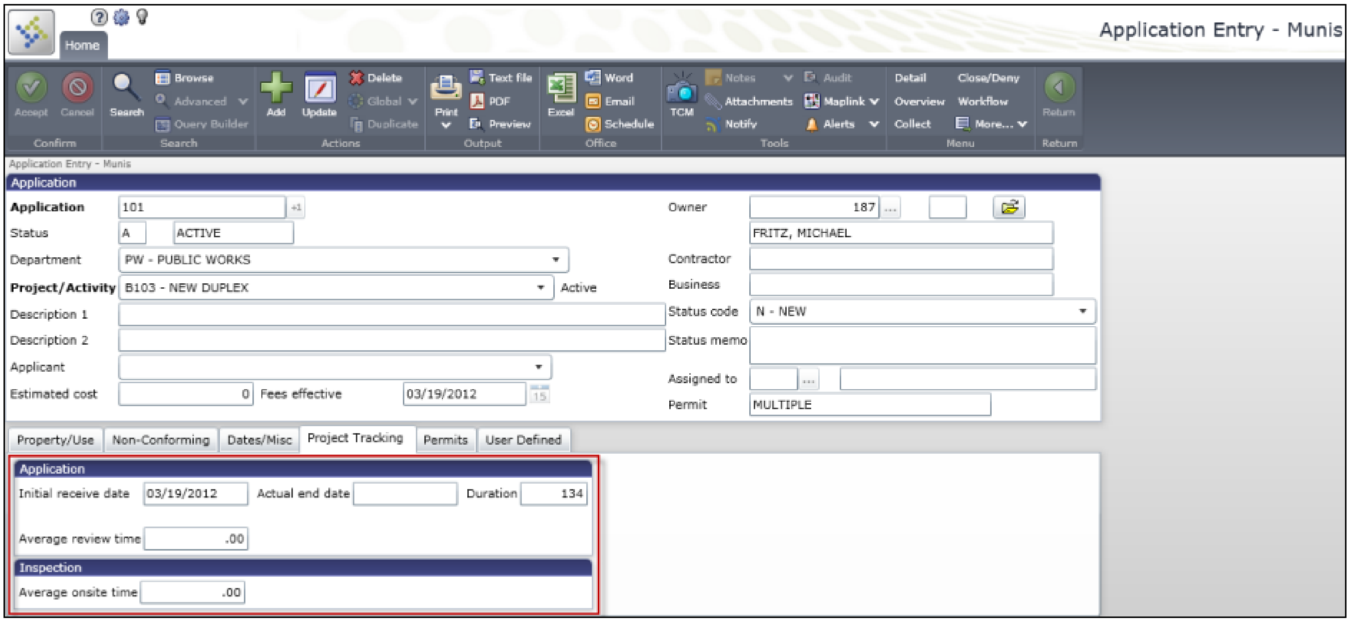
Click Overview in the Menu group to access the Project Types Overview screen.



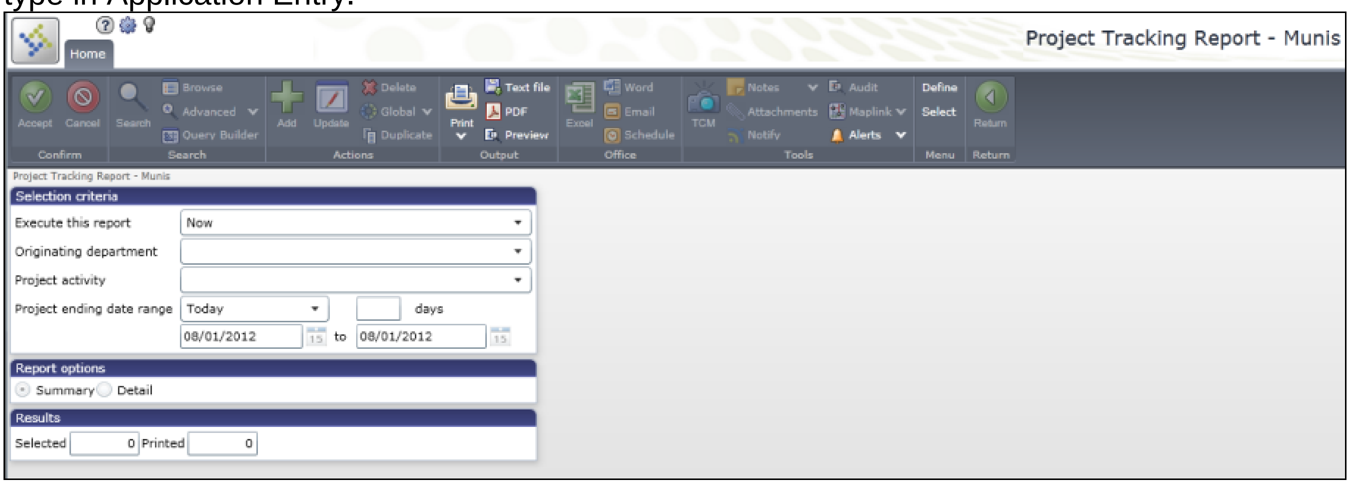


Application Entry, Project Tracking Report

The Project Tracking tab in Application Entry allows you to measure the process time for applications and inspections.

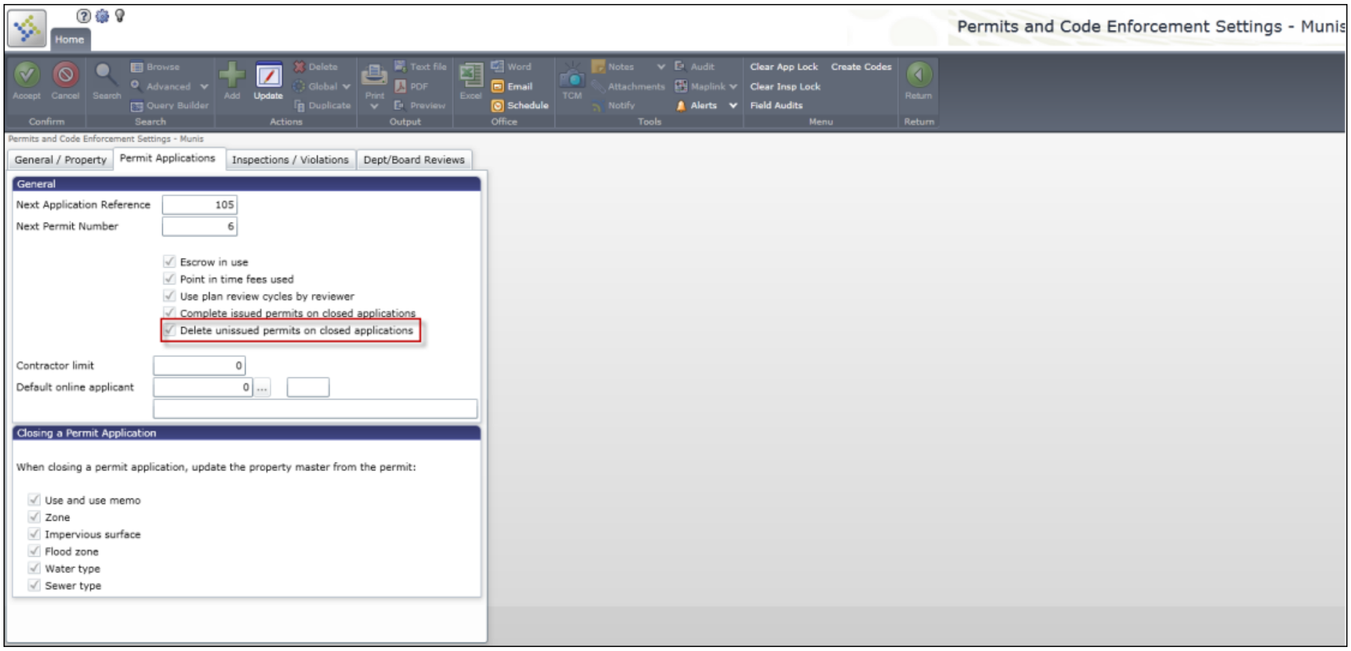


When you create a Project Tracking Report, it provides the results of project tracking by project type in Application Entry.



Permit and Code Enforcement Settings

The Delete Unissued Permits on Closed Applications check box is available in Permits and Code Enforcement Settings on the Permit Applications tab. When an application is closed, all unissued permits are deleted for statuses other than Complete.

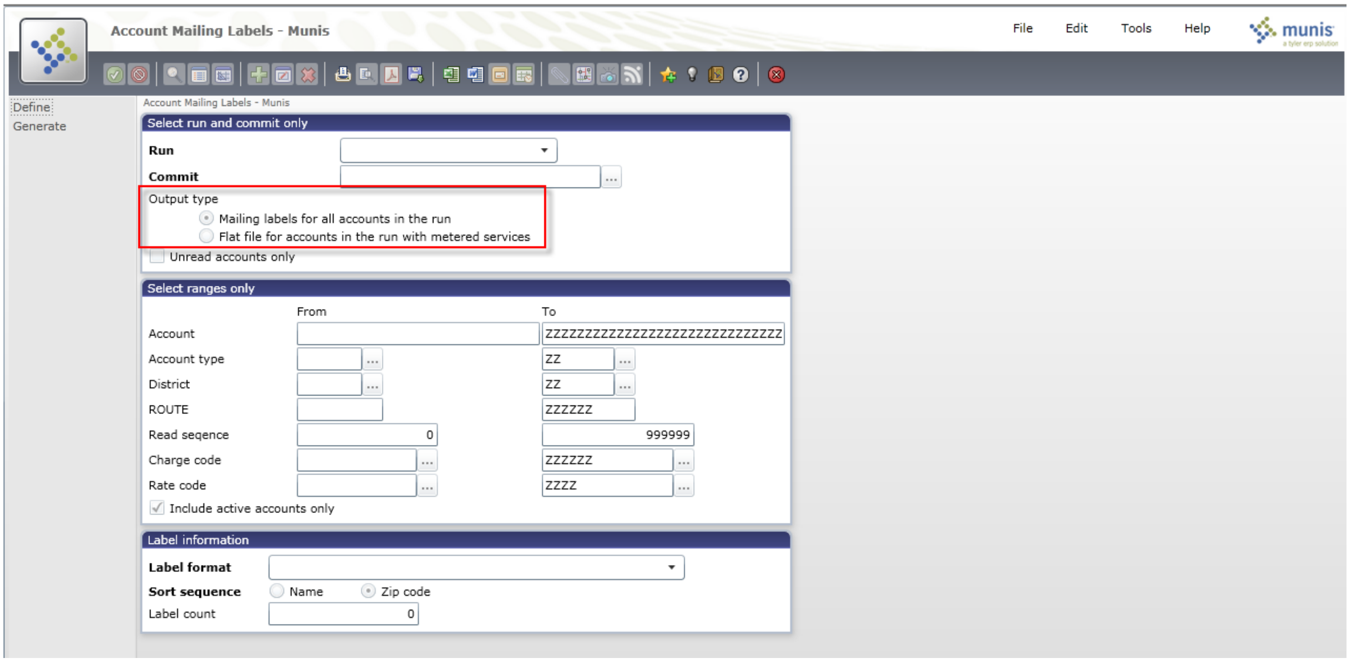

Permits and Code Enforcement Settings - Munis
Home
Accept
Cancel
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Print
Text file
PDF
Preview
Excel
Word
Email
Schedule
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Clear App Lock
Create Codes
Clear Insp Lock
Field Audits
Return
Confirm
Search
Actions
Output
Office
Tools
Menu
Return
Permits and Code Enforcement Settings - Munis
General / Property
Permit Applications
Inspections / Violations
Dept/Board Reviews
General
Next Application Reference
105
Next Permit Number
6
Escrow in use
Point in time fees used
Use plan review cycles by reviewer
Complete issued permits on closed applications
Delete unissued permits on closed applications
Contractor limit
0
Default online applicant
0
Closing a Permit Application
When closing a permit application, update the property master from the permit:
Use and use memo
Zone
Impervious surface
Flood zone
Water type
Sewer type

Utility Billing - CIS

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

Account Mailing Labels

The Output Type option provides the following choices when you are creating labels for a defined run/commitment: Mailing Labels for All Accounts in the Run and Flat File for Accounts in the Run with Metered Services.



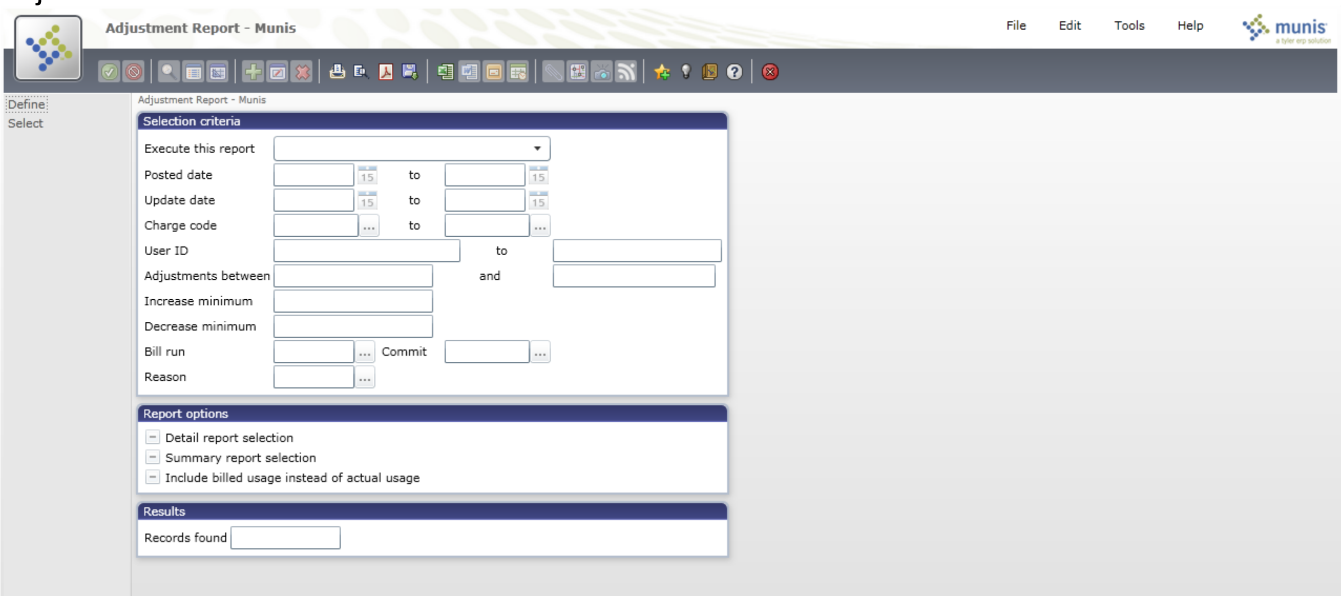
When you select the Flat File option, only accounts in the run that have at least one metered service are selected. The file may contain account, name, mailing address, and first metered service meter number, based on form definition. If you select this option, the Unread Accounts Only check box is available.

When you select the Mailing Labels output type, the program prints labels for all accounts in the run/commitment.

Adjustment Report

The Adjustment Report is available on the Inquiries and Reports > Assessment Reports menu.

This report identifies difference amounts for completed bill adjustments using data from bill adjustment tables.



The program selects adjustments according to Account or Account/CID setting in the Settings program. The order is by descending dates from the most recent update.

The report includes the updated date, posted date, user ID, and reason code for each charge amount. If multiple adjustments were made to the same bill, the report lists each one individually, grouping the adjustments by account or account/CID, bill number, and descending adjustment date.

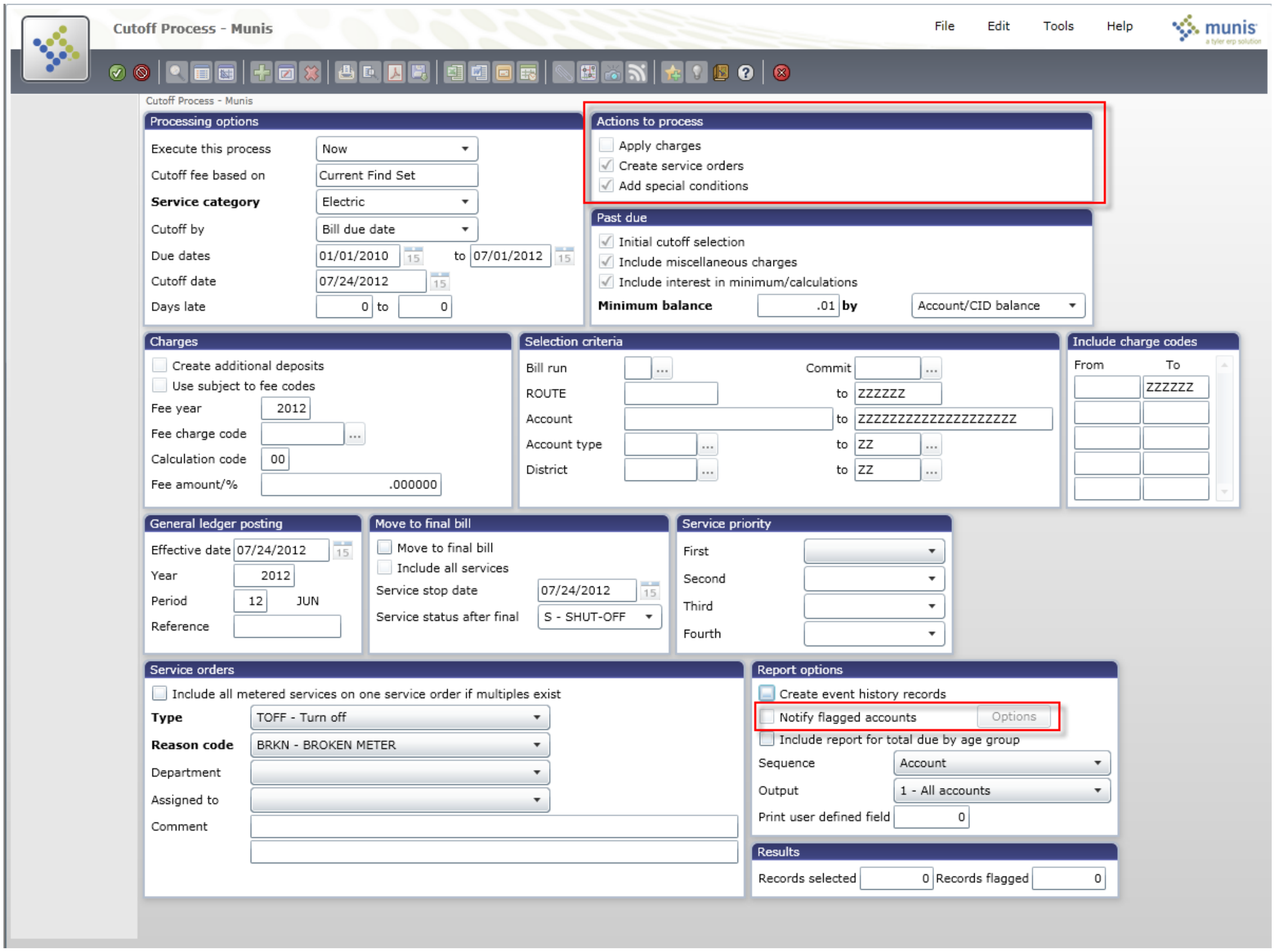
If you select the Summary Report Section check box, the report includes a summary section at the end of the report. This section summarizes amounts and consumption by charge code/rate code, user id, reason code, and run/commit.

Cutoff Process

The Actions to Process group provides individual actions for the cutoff process:

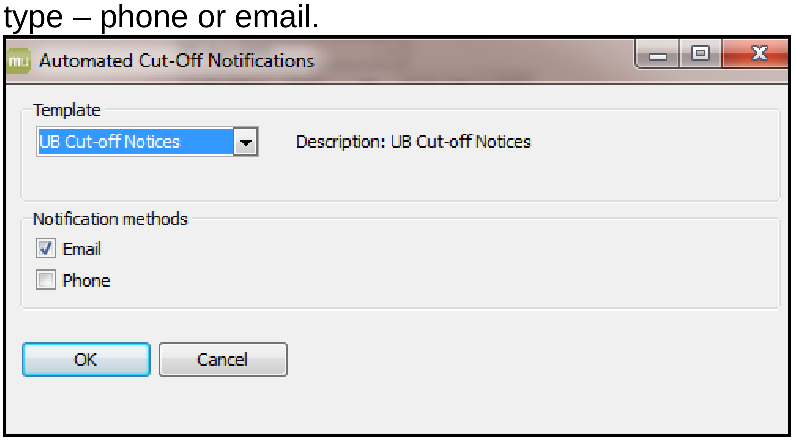
- Apply Charges – Only creates the cutoff charges
- Create Service Orders – Only creates the service orders
- Add Special Conditions – Only allows special conditions to be added.

If you do not select one of these check boxes to define the action to process, the program displays a “No actions defined to process” message.



In the Report Options group, the Notify Flagged Accounts check box allows you to automatically notify holders of accounts selected on the Flag Cutoff screen.

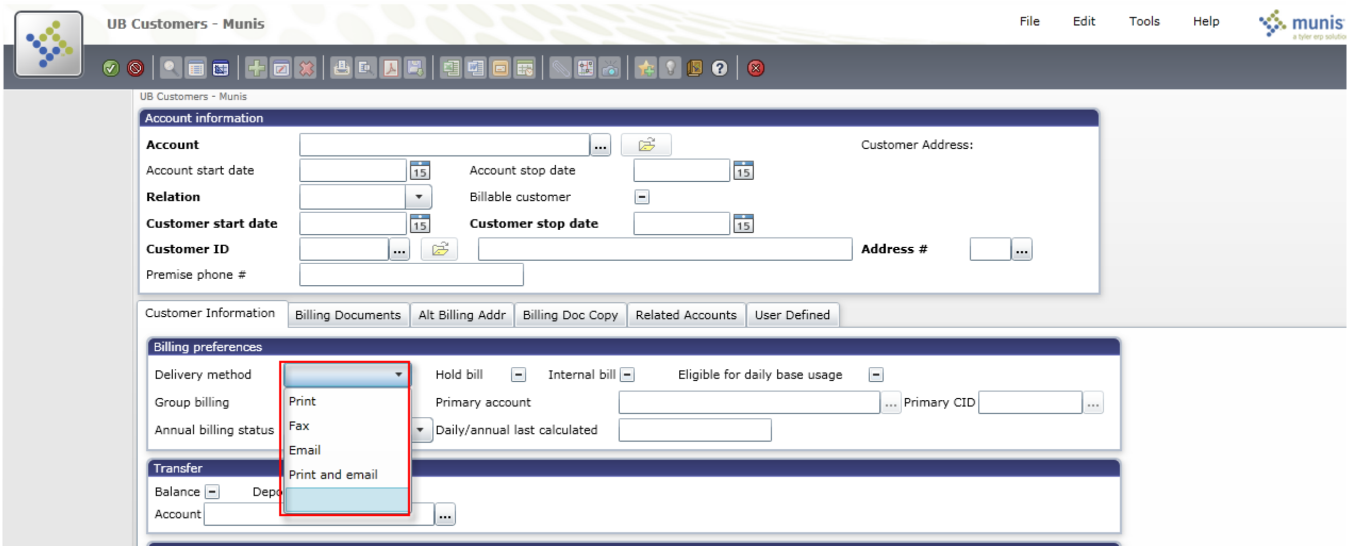
When select this check box, the Options button is available. When you click Options, the Automatic Cutoff Notifications dialog box allows you to select the template and notification type – phone or email.



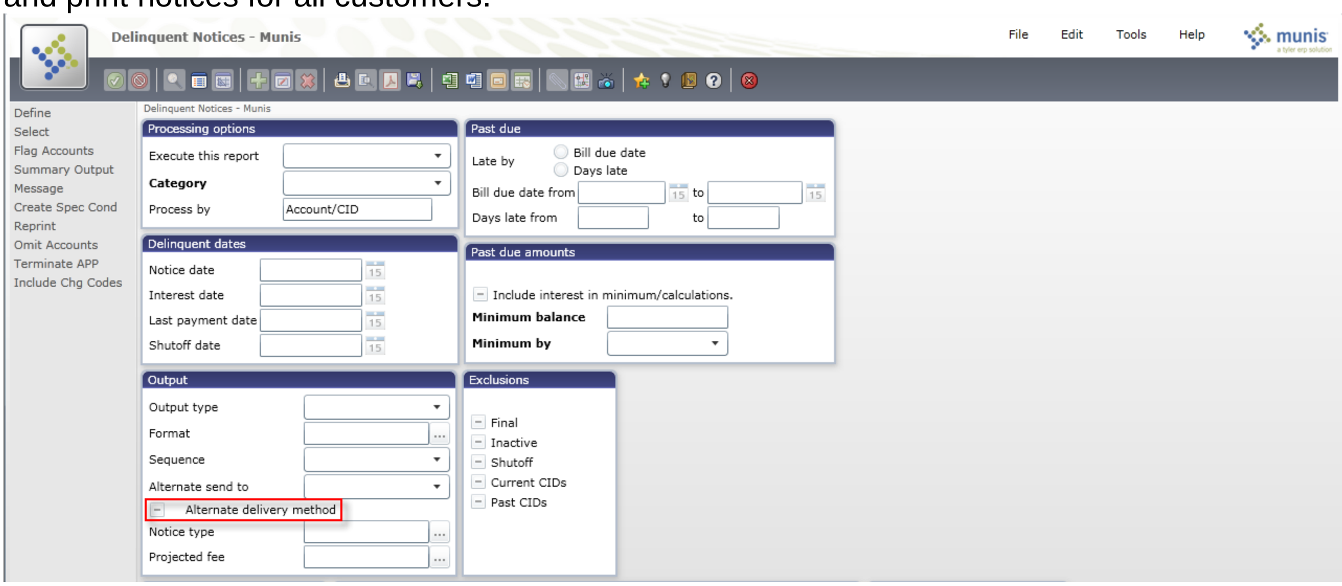
Note: This feature is only available if your organization has implemented Tyler Notify. Templates and message content are maintained in the Tyler Notify Settings program.

Delinquent Notices

The XML output includes delivery information to support email or fax delivery of delinquent notices. If the value of the Delivery Method list in the UB Customers program is Email or Print and Email, the XML file includes the delivery method and email address information. If the value of the Delivery Method list is Fax, the XML file includes the delivery method and Fax number from the customer file.

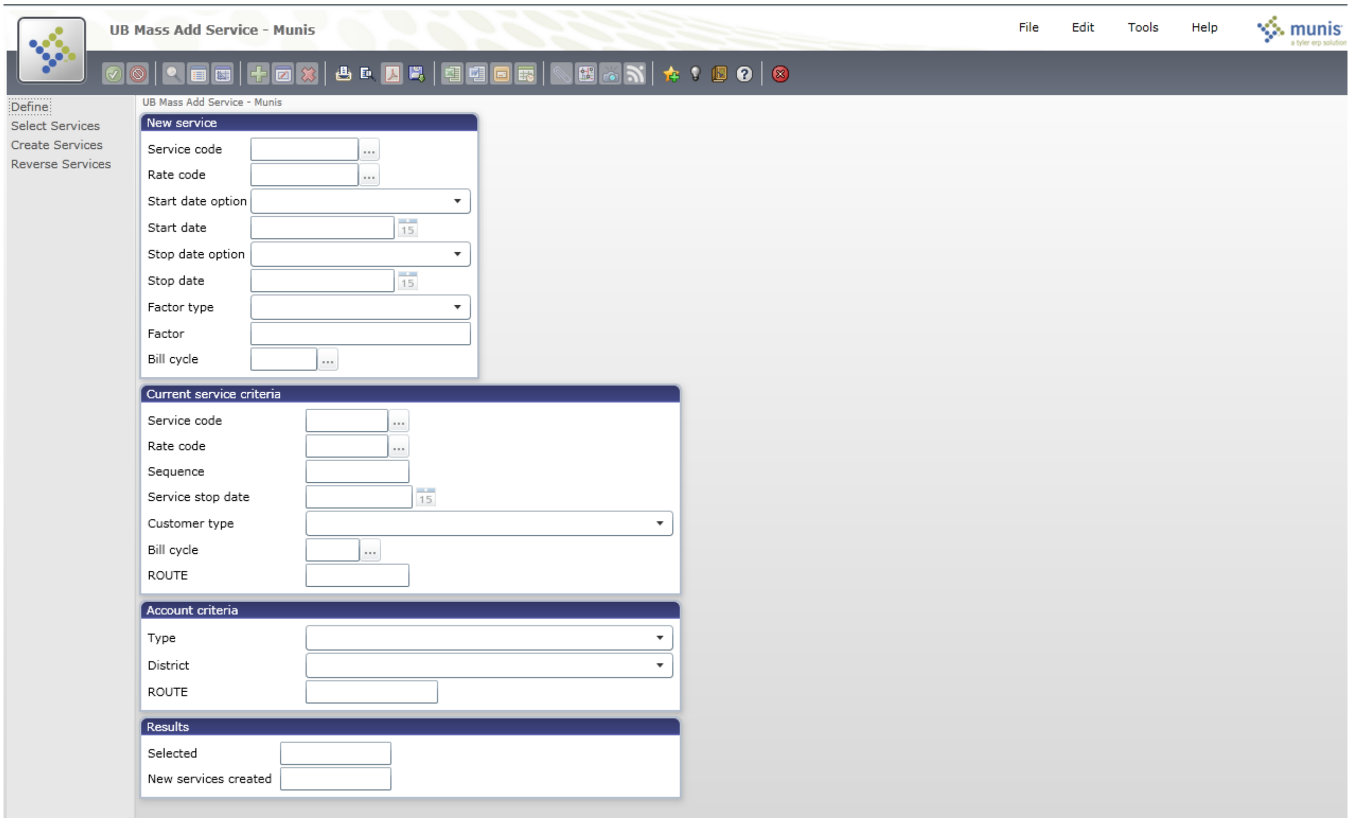


The Alternate Delivery Method check box in the Output group of the Delinquent Notices program, if selected, causes the program to overwrite the selected customer delivery methods and print notices for all customers.



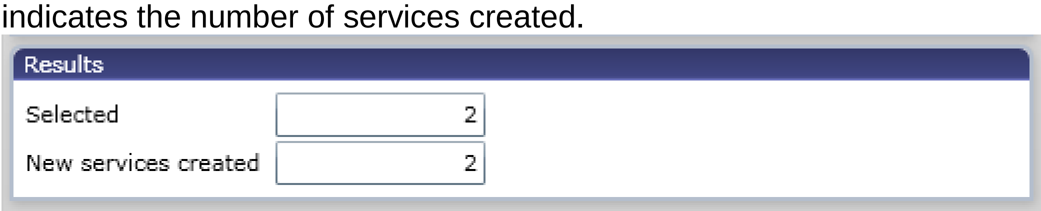
Mass-Add Service

The Mass-Add Service program is available on the Special Processing > Critical Services menu.



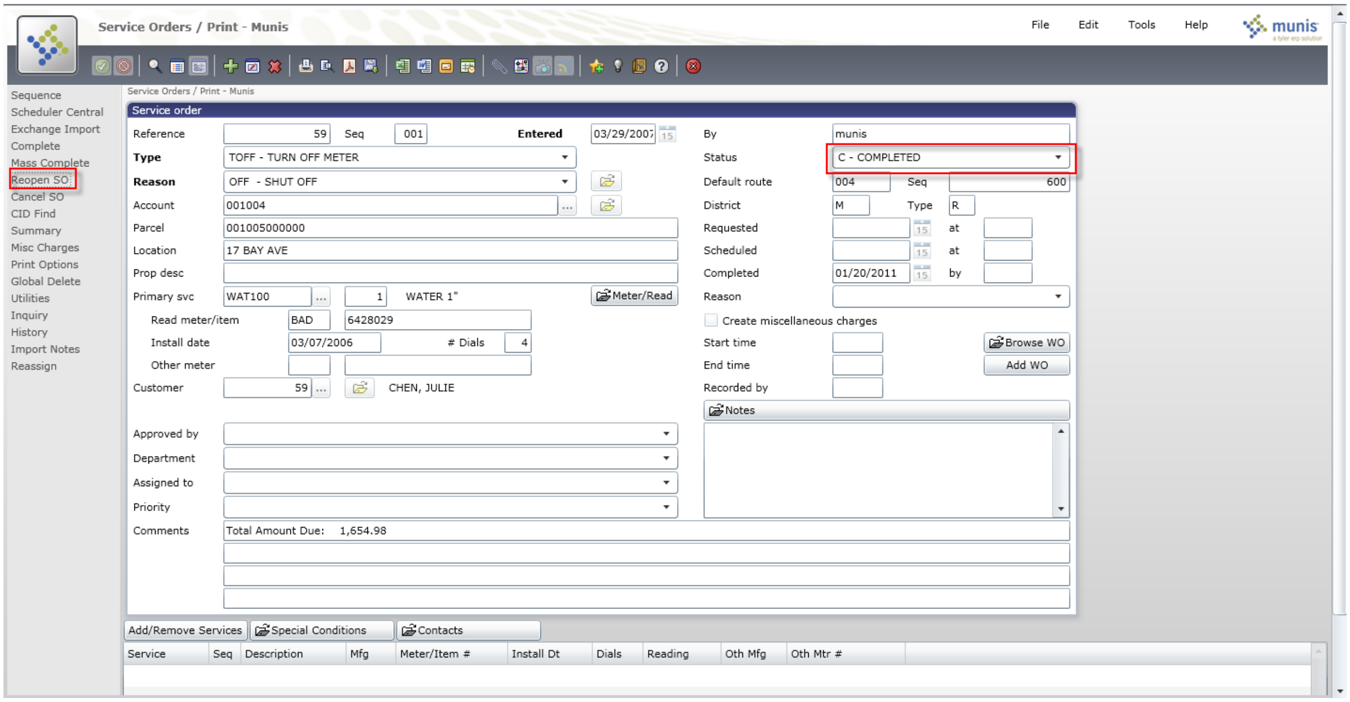
This program adds multiple services based on the presence of another service code on the account or on other user-defined criteria such as district, rate code (must exist for service code), service sequence, route range, and account user-defined fields. If a present service code is defined, the Stop Date box is available so that only services with stop date after 'X' are reviewed for adding the new service.

Once you define the service, use the Select Services option to find the services matching the criteria, select an output option to create a report of the selected services to verify the services included, and then use the Create Services option to complete the process. The Results group indicates the number of services created.

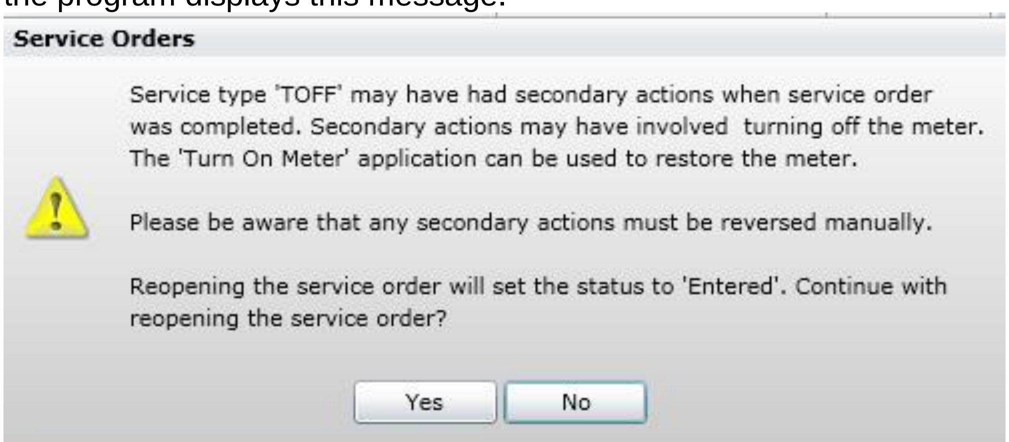


Service Orders/Print

For service orders with the status of Completed, the Reopen SO option is available. This allows you to reopen completed service orders by resetting the value of the Status list to Entered.



When you select Reopen SO, the program provides a message indicating any secondary actions that may need to be reversed manually. For example, for the Turn Off Meter service, the program displays this message.

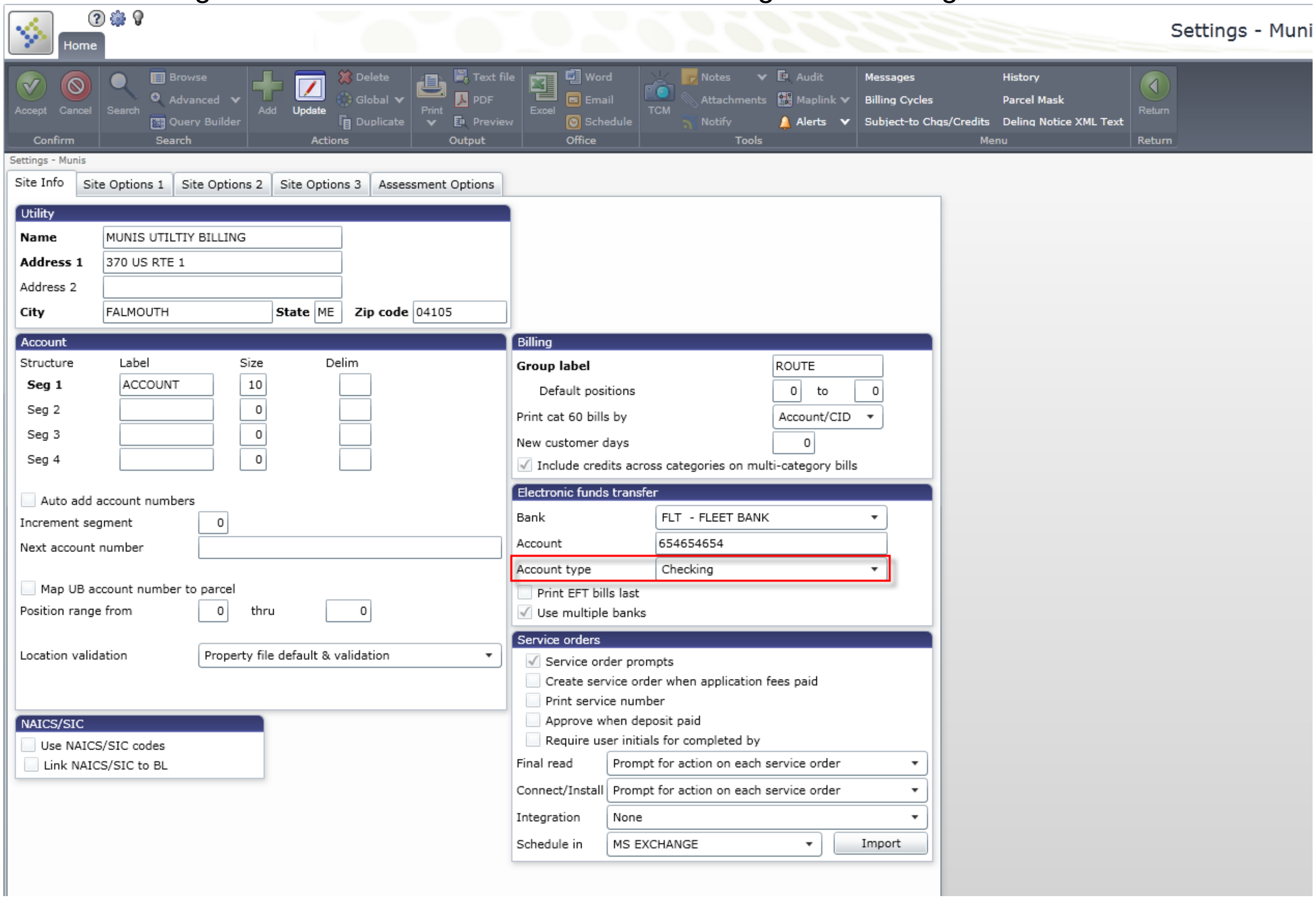


Click Yes to reset the status to Entered. If your organization uses workflow, the approval process restarts.

Settings

The Discount group, which contained the Early Payment Discount and Days Prior to Due boxes, is not available on the Site Options 1 tab in the Settings program. Discount terms are defined in the Accounts Receivable Settings program according to AR category.

In the Electronic Funds Transfer group on the Site Info tab, the Account Type list indicates whether an organization's EFT bank account is a savings or checking account.



Programs evaluate this value when creating the EFT data file and creating an off-setting deposit record. Savings account types are indicated as 32 and checking accounts indicated as 22.

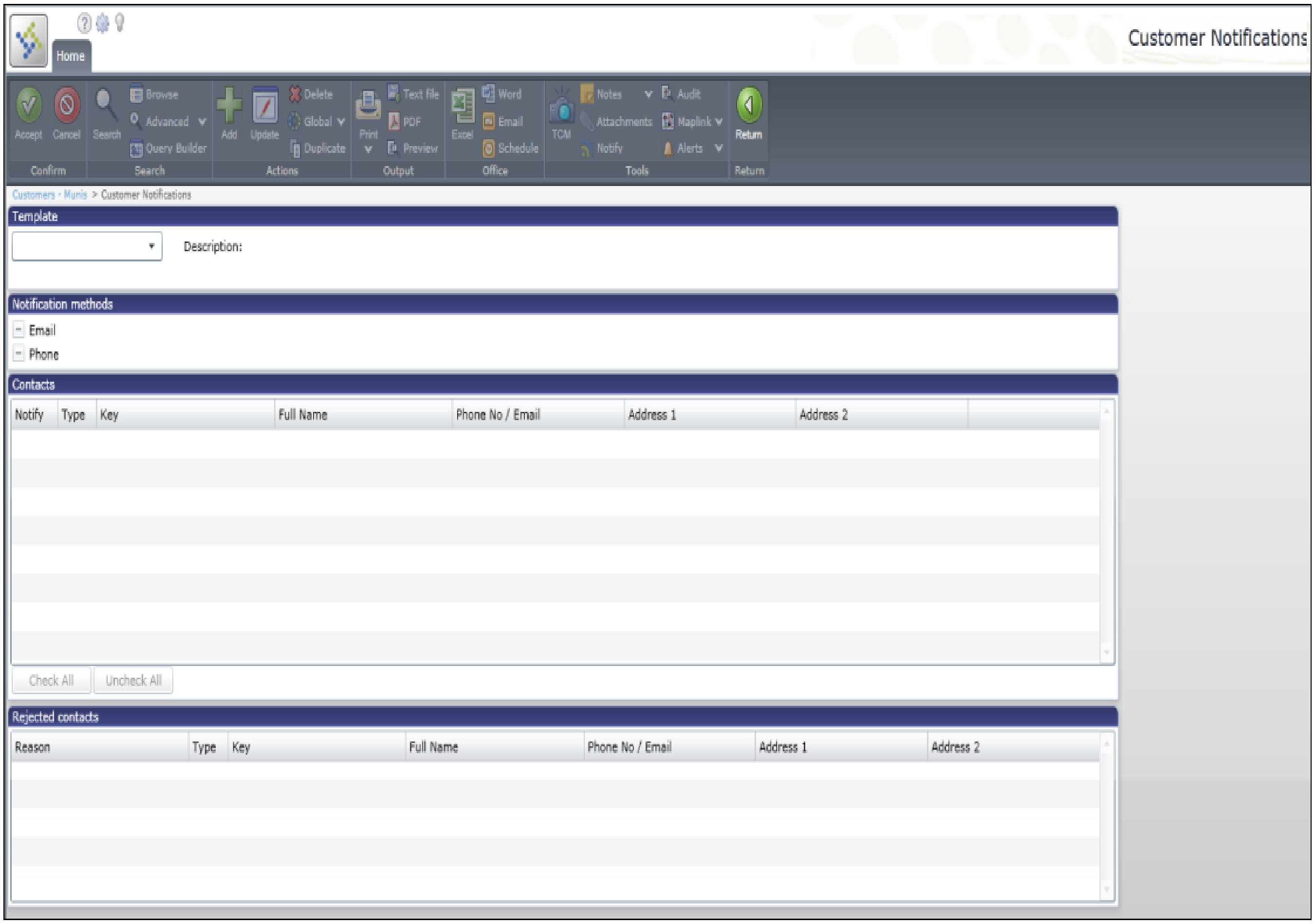
Tyler Notify

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

The following Munis Revenues programs are enhanced with Tyler Notify:

- Accounts Receivable
  - Customers
  - Receipt Inquiry
- Business Licenses
  - Business Accounts
  - Delinquent Report
- Permits and Code Enforcement
  - Application Entry
- Property Tax
  - Parcels
  - Personal Property
- Utility Billing – CIS
  - Cutoff Process
  - Lien Delinquent Bills

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

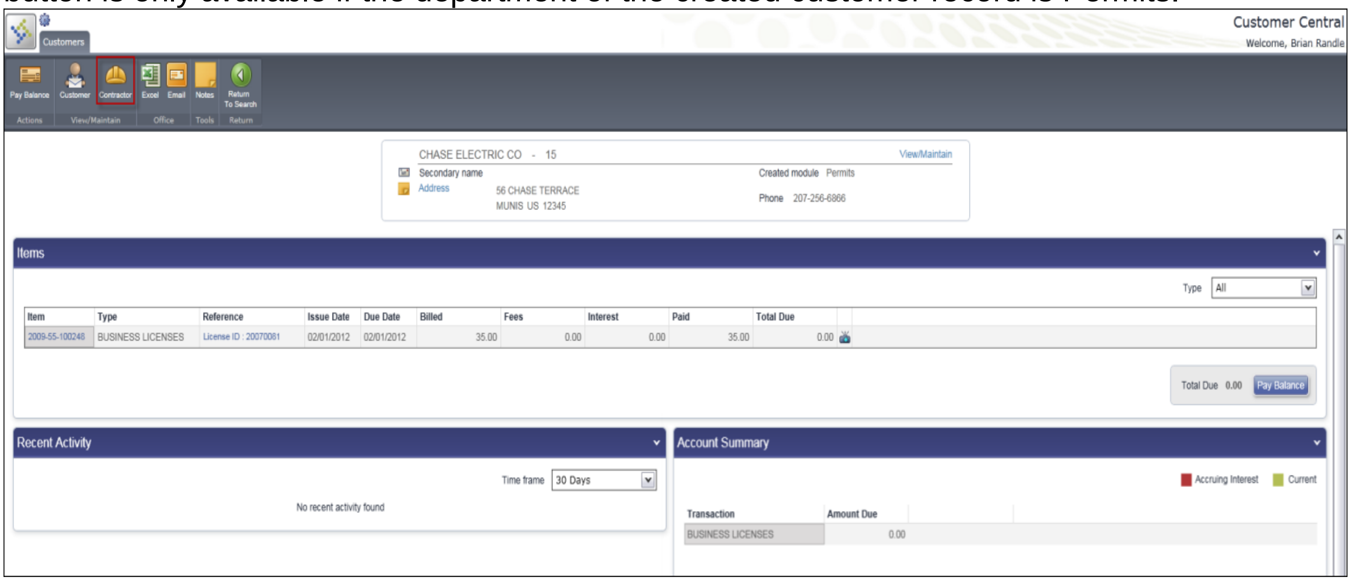

Customer Notifications
Home
Accept
Cancel
Confirm
Browse
Search
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Actions
Print
Text file
PDF
Preview
Output
Excel
Word
Email
Schedule
Office
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Tools
Return
Customers - Munis > Customer Notifications
Template
Description:
Notification methods
Email
Phone
Contacts
Notify
Type
Key
Full Name
Phone No / Email
Address 1
Address 2
Check All
Uncheck All
Rejected contacts
Reason
Type
Key
Full Name
Phone No / Email
Address 1
Address 2

Munis Centrals Programs

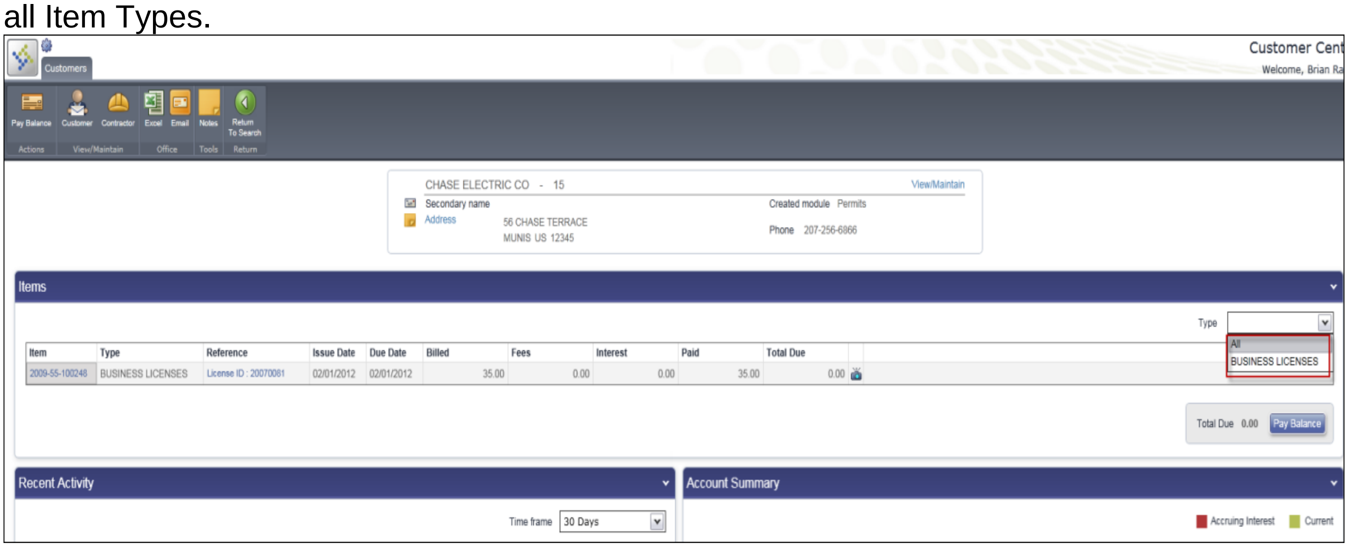
The following changes apply to Munis Centrals programs.

Customer Central

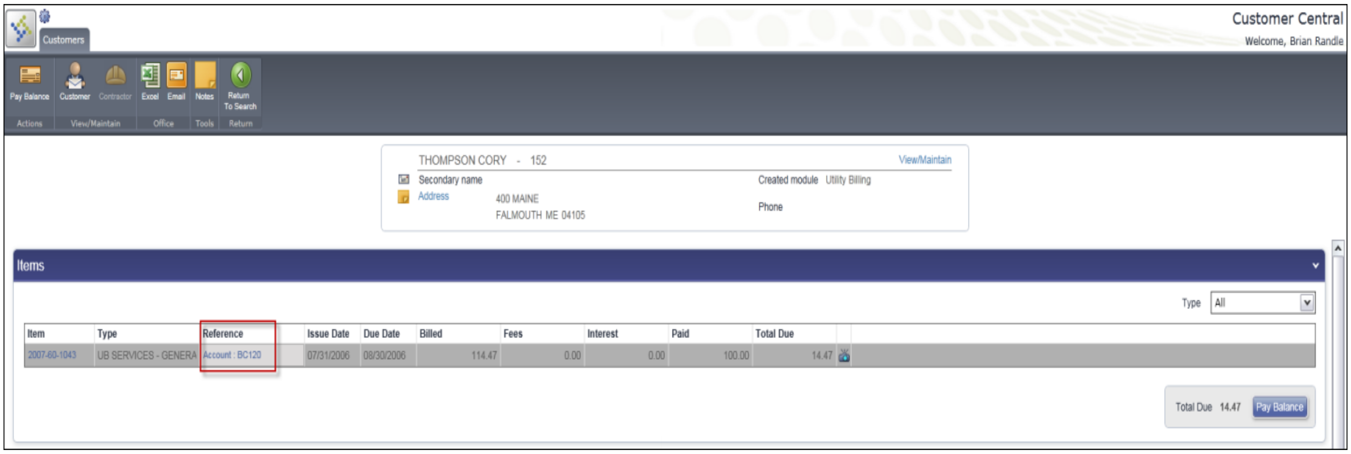
The Contractor button links contractor records in Customer Centrals to Contractor Central. The button is only available if the department of the created customer record is Permits.



The Items pane on the Detail page of Customer Central allows you to filter the item by Types. If you have restrictive Accounts Receivable Code Access permissions, you are not able to see all Item Types.

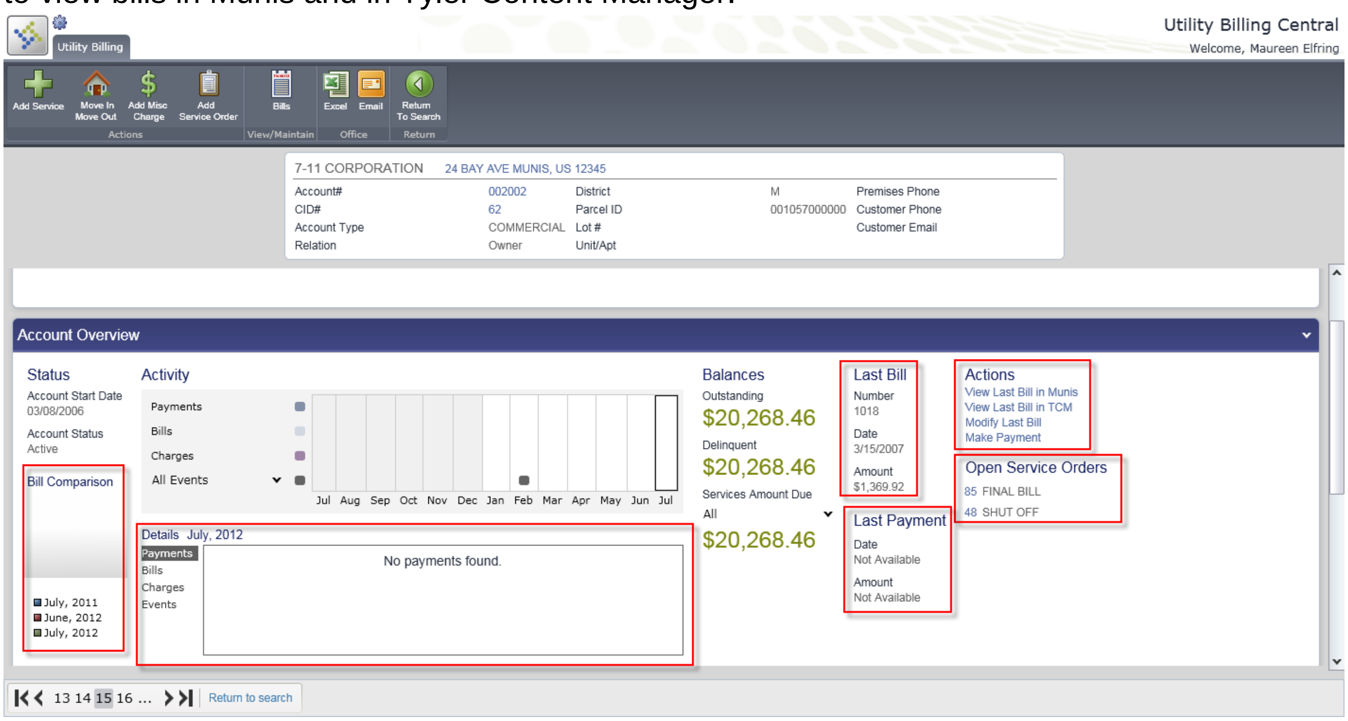


Utility Billing records are accessed through the Reference field on the Items pane in Customer Central. The Customer program redirects you to Utility Billing Central.



UB Central

The UB Central Account Overview pane provides status, activity balance, and billing details. It also includes a Bill Comparison graph that compares the current bill to the previous month's bill and the bill for the same month last year. A detail box for charges, payments, and bill provides additional information for selected items. The options in the Actions group allow you to view bills in Munis and in Tyler Content Manager.



Munis Self Service

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

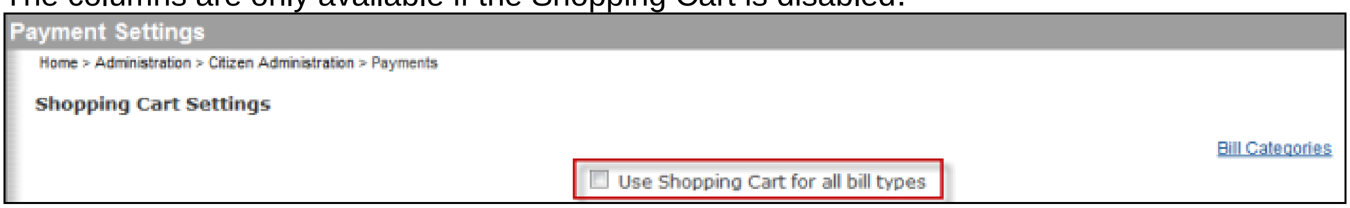
Citizen Administration

Credit Card Service and eCheck Service payment settings are available on the Bill Categories group in Payments Administration and only contain the names of the currently selected credit cards and eCheck providers.

Bill Categories

Description	Web Payments	CC Service	eCheck Service	
ANIMAL LICENSES	Enabled	SimPay	SimPay	edit
BUSINESS LICENSES	Enabled	SimPay	SimPay	edit
GENERAL BILLING & MISC CASH	Enabled	SimPay	SimPay	edit
MOTOR VEHICLE	Enabled	SimPay	SimPay	edit
OTHER SERVICES (MISC RECEIPTS)	Enabled	SimPay	SimPay	edit
PARKING TICKETS	Enabled	SimPay	SimPay	edit
PERMITS INSPECTIONS	Enabled	SimPay	SimPay	edit
PERSONAL PROPERTY	Enabled	SimPay	SimPay	edit
REAL ESTATE	Enabled	SimPay	SimPay	edit
TAX LIEN	Disabled	NA	NA	edit
UB ASSESSMENTS	Enabled	NA	NA	edit
UB SERVICES - GENERAL	Enabled	SimPay	SimPay	edit

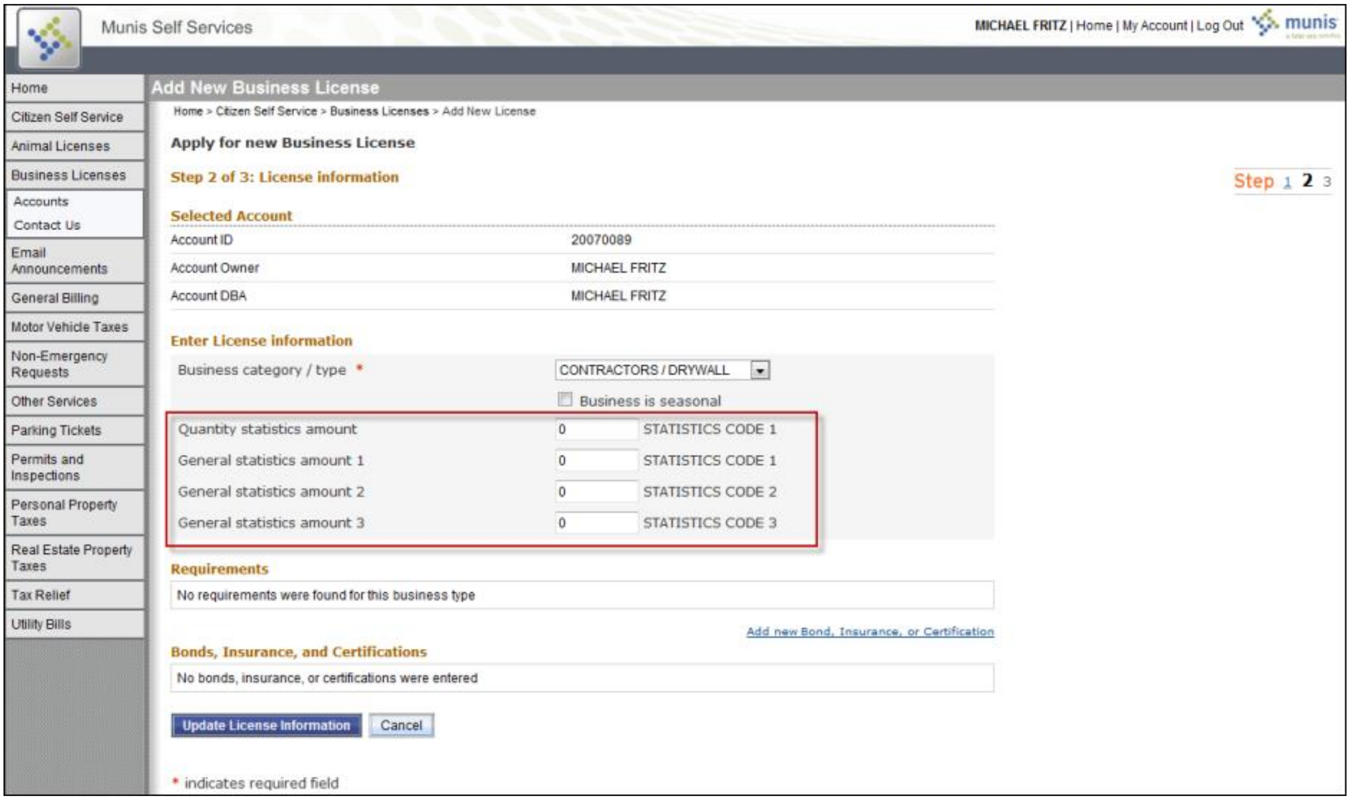
The columns are only available if the Shopping Cart is disabled.



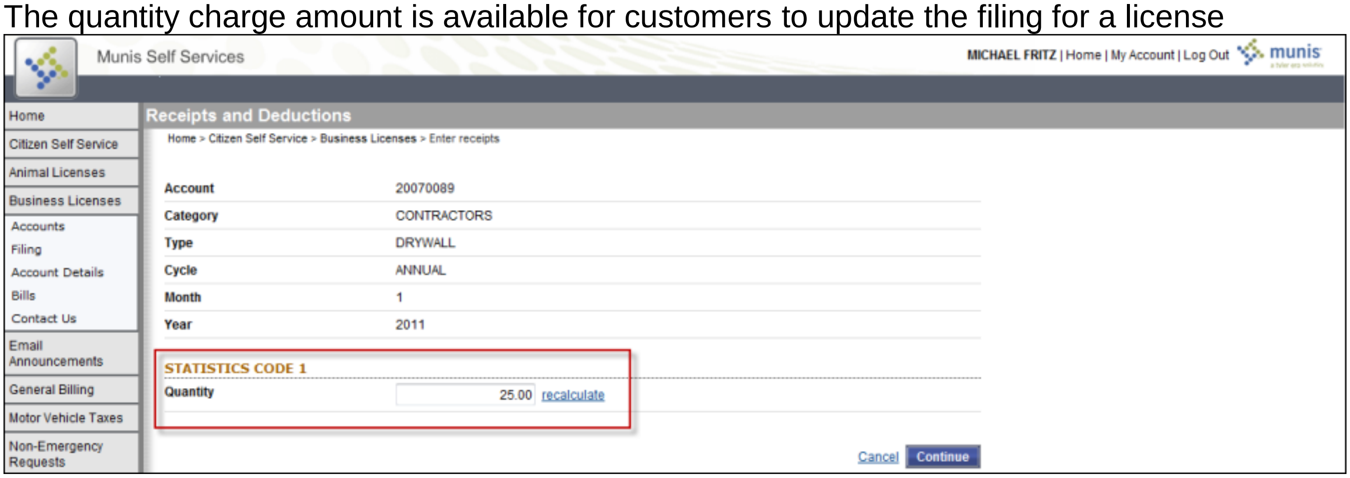
Business Licenses

The quantity/statistic amounts are available to citizens when adding a new license in Citizens Self Service. Quantity-based charge calculations typically consist of a rate multiplied by count. In Munis, the quantity amount is entered either directly on the license charge or as a license quantity/statistic amount.

The Allow License Quantity/Amount Entry Online check box must be selected on the Charges screen in Business Types.



The quantity charge amount is available for customers to update the filing for a license



The Allow Charge Quantity/Amount Entry Online check box must be selected on the Charges screen of Business Types.

Available Web Parts

Munis web parts are applicable if your organization uses Tyler Dashboard. The following table provides a description of web parts currently available for Munis Revenues products.

Web Part	Description
Revenues	
Accounts Receivable	
AR Collections	Displays the total collected amount by date range.
Business Licenses	
Business Licenses	Displays Business Licenses through the specified date.
Permits and Code Enforcement	
Inspector Schedule Routing - ESRI	Provides the location of the scheduled inspection through MapLink.
Inspector Schedule Routing - Bing	Provides the location of the scheduled inspection through Bing Maps.
Open Violations	Displays views of open violations by the number of days open: • All Open Violations • 0 to 30 Days • 31 to 60 Days • 61 to 90 Days • Over 90 Days
Permits Issued	Displays permits that are issued through the specified date.
Permits Pending	Displays permits that are pending.
Resolved Violations	Displays resolved violations from the specified date.
Scheduled Inspections	Displays inspections that are scheduled.
Property Tax	
Tax Exemptions	Displays tax exemptions for Real Estate or Personal Property.
Tax Valuations	Displays tax valuations for Real Estate and Personal Property.
Unposted Tax Transactions	Displays unposted tax transactions using filter criteria by: • Transaction Type • Owner Name • Category • Bill • Entry Date • Amount
System Administration	
Audit Central	Displays a list of all of the changes made for the application, user ID, action, file, or field that you indicate on the Filter lists.
Program Activity Log	Displays information about programs that have completed running or that are currently running in Munis.

Web Part	Description
System Error Log Viewer	Displays system errors for Munis programs by user ID.
Tyler Dashboard	
E-mail Settings	Configures the settings for sending e-mails from Web parts that have the e-mail button enabled, such as Exception Viewer or Workflow Manager.
My Favorites	Creates links to frequently used Web sites, Tyler Dashboard views, or programs.
Munis Workflow	
My Workflow	Displays the number of workflow approvals, notifications, and alerts currently pending.
My Work Detail Classic	Displays a list of your pending approvals, notifications, or alerts.
Workflow Manager	Displays a list of workflow items by process or approver compared to a specified date