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technologies

Munis Revenues

Major Enhancements
Version 10.3
March 21, 2013

For more information, visit www.tylertech.com.

TABLE OF CONTENTS

Munis Revenues

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

The Munis Revenues product contains General Revenues and Property Revenues:

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

- Property Revenues includes Accounts Receivable, Business Licenses, Central Property, Permits and Code Enforcements, Property Tax Billing, and Utility Billing.

- Revenues central programs include Customer Central, Property Central, UB Central, Contract Central, and Permit Central.

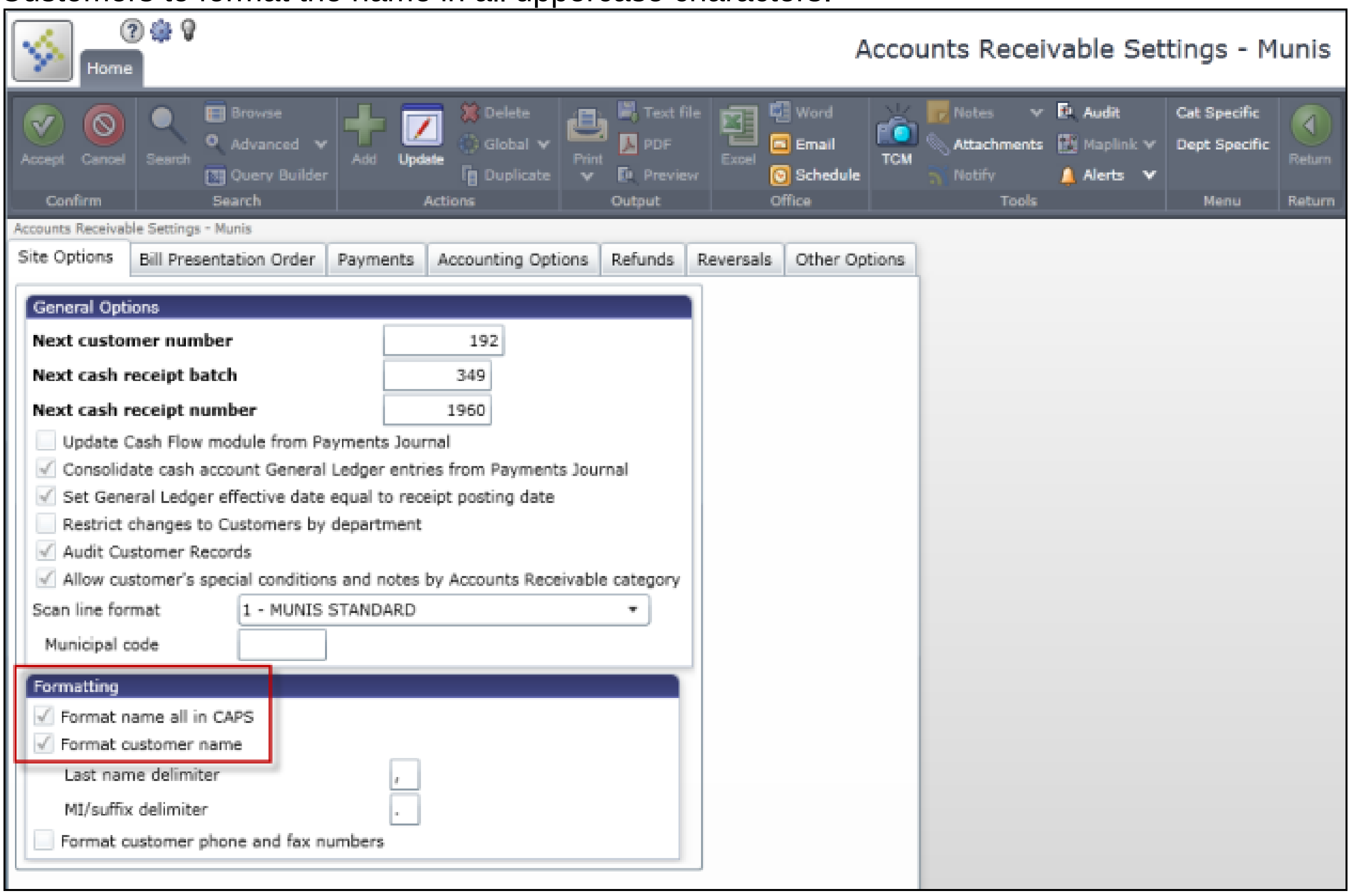
Please refer to the Version 10.3 Munis Release Notes on the Munis Knowledgebase (http://muniskb.tylertech.com/search.aspx) for information regarding state-specific updates and all other changes not covered in this document.

Accounts Receivable

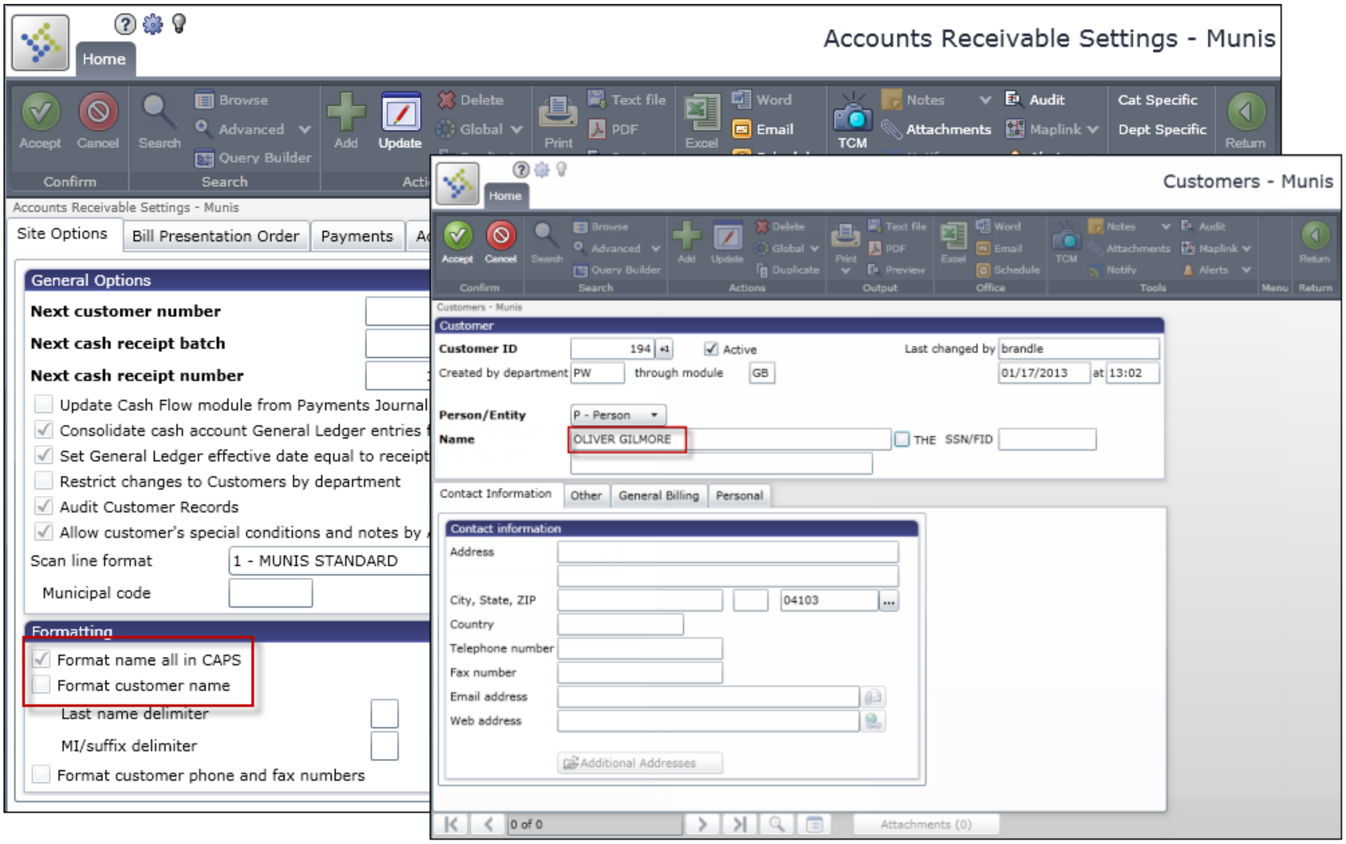
The following changes apply to Munis Accounts Receivable programs.

Accounts Receivable Settings, Customers

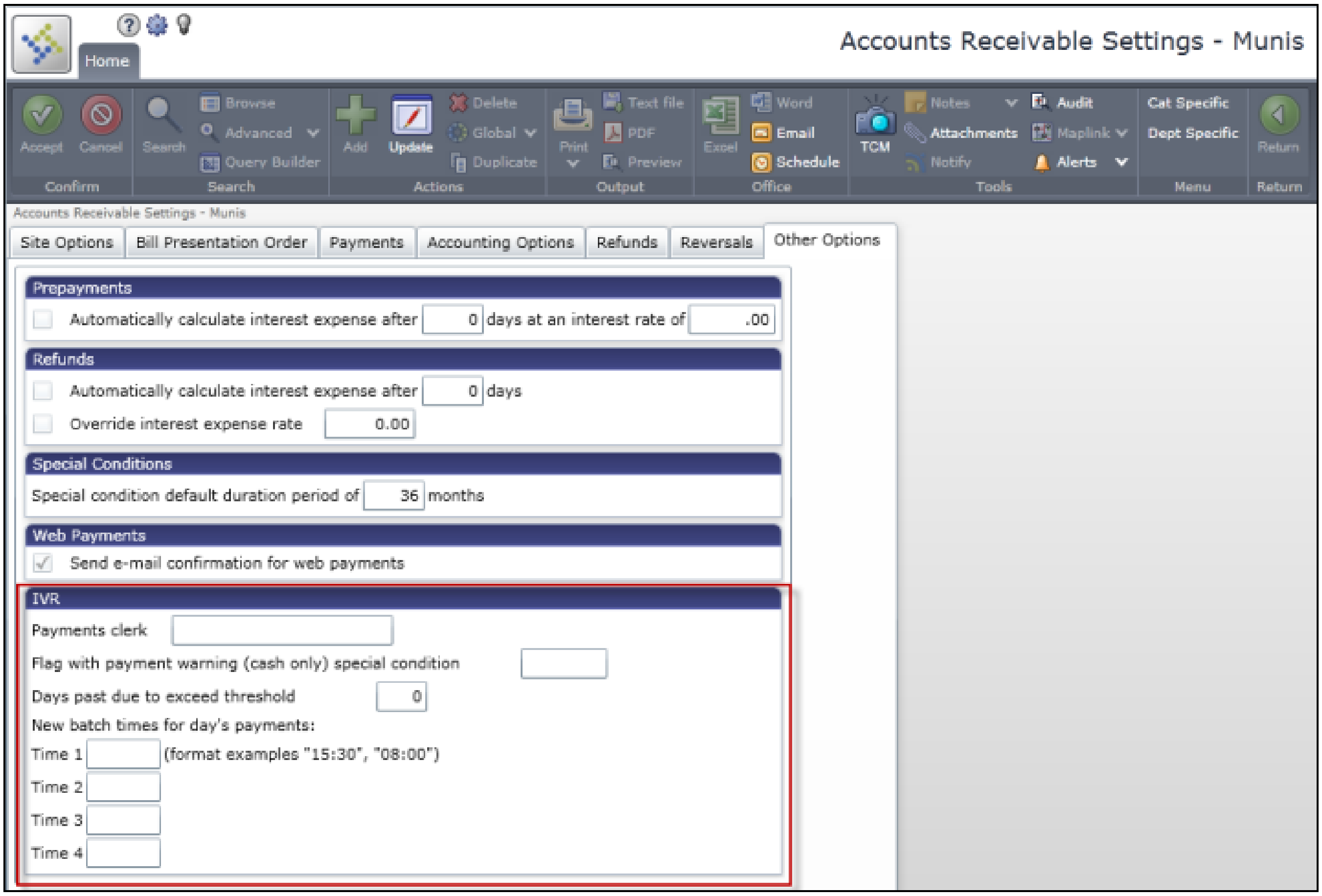
The Format Name in All Caps check box displays above the Format Customer Name check box in the Formatting section on the Site Options tab. The Format Customer Name check box does not need to be selected along with the Format Name in All Caps check box in order for Customers to format the name in all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



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

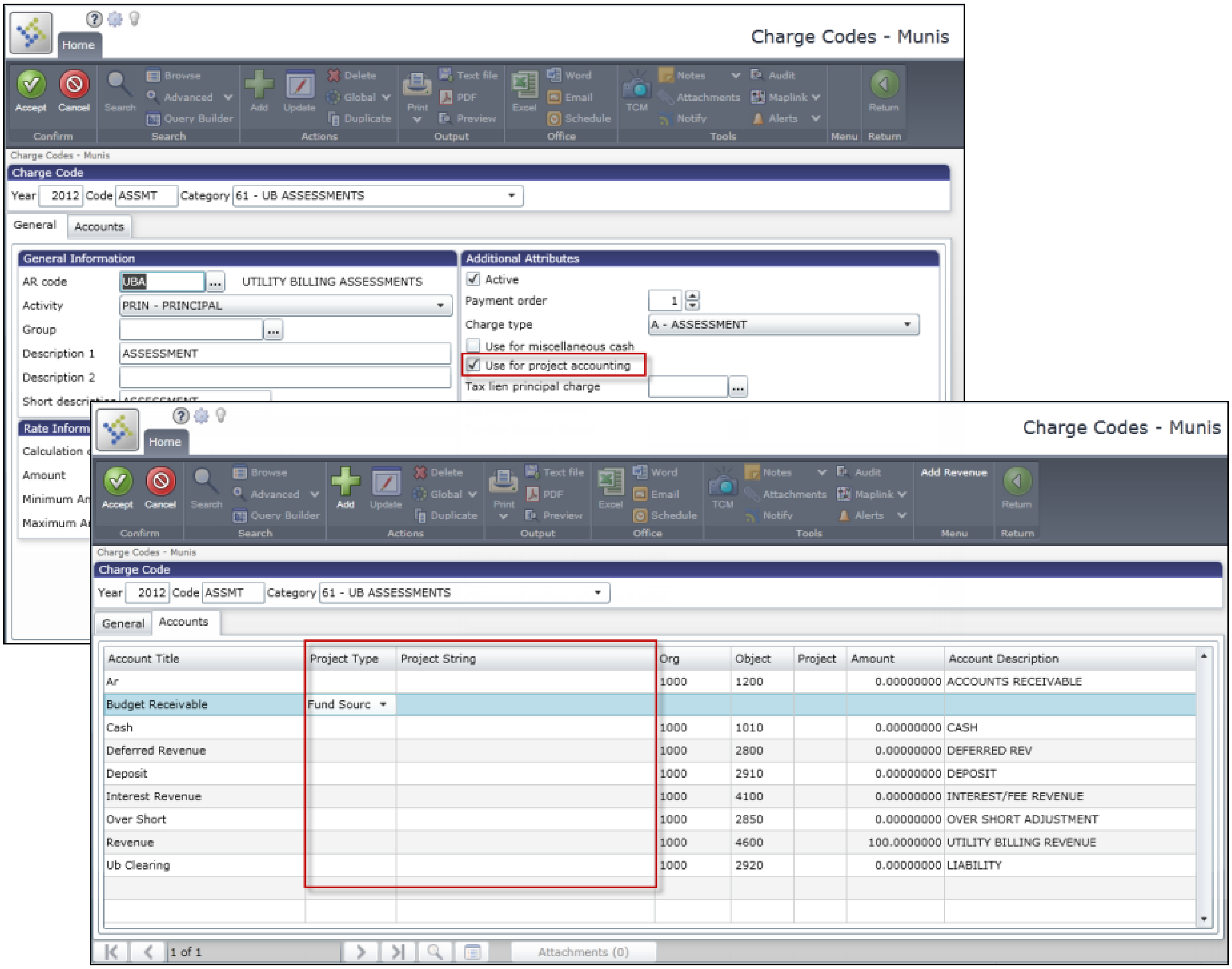


The IVR (Interactive Voice Response) group is available on the Other Options tab in Accounts Receivable Settings. Within the IVR group, you can enter the clerk name for payments, identify a Special Condition Code for warning against cash only payments, indicate the number of days prior to exceeding a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



Charge Codes

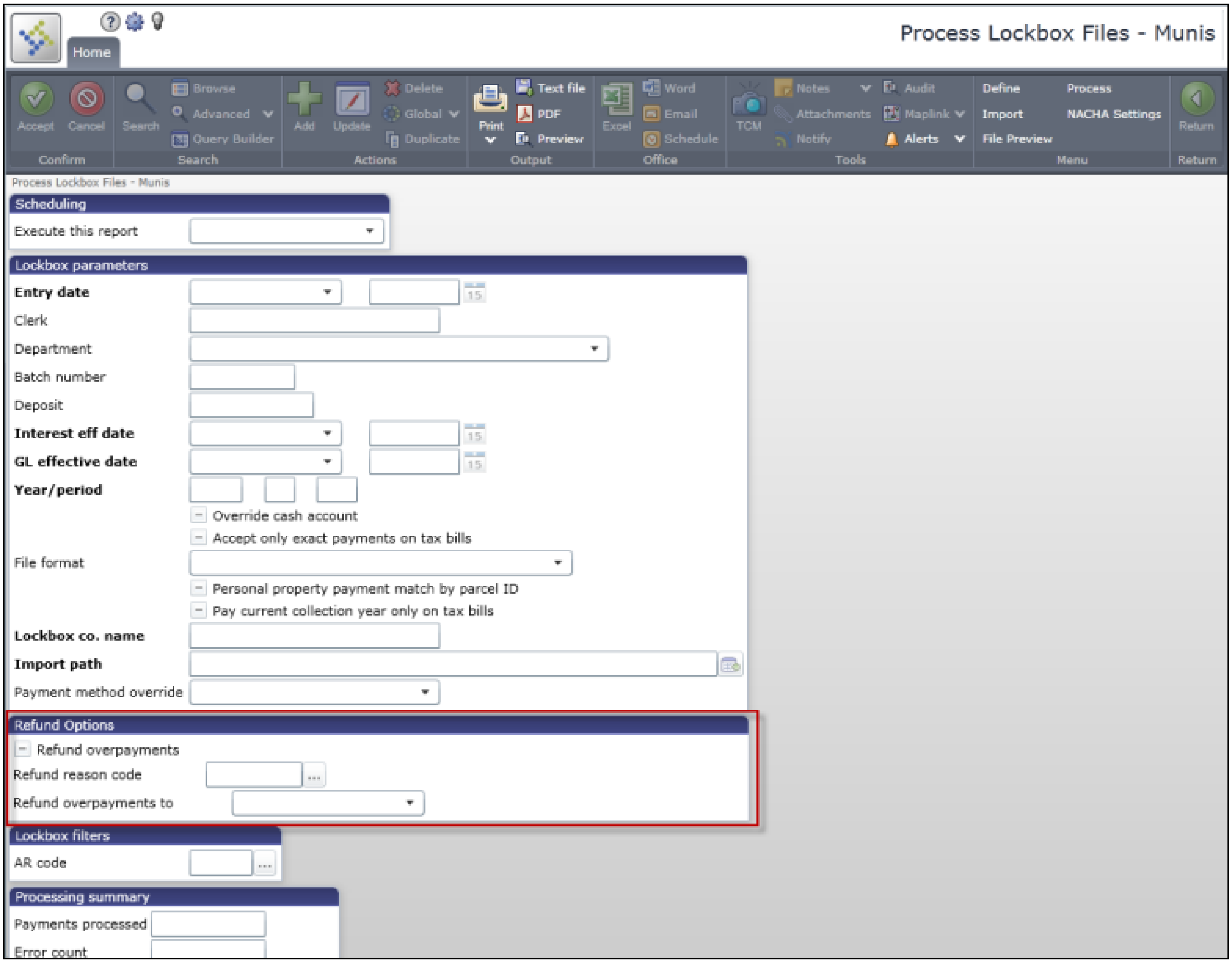
The Use for Project Accounting check box is available on the General tab for Utility Billing charge codes, allowing the Project Type and Project String fields to be accessible on the Accounts tab.



Process Lockbox File

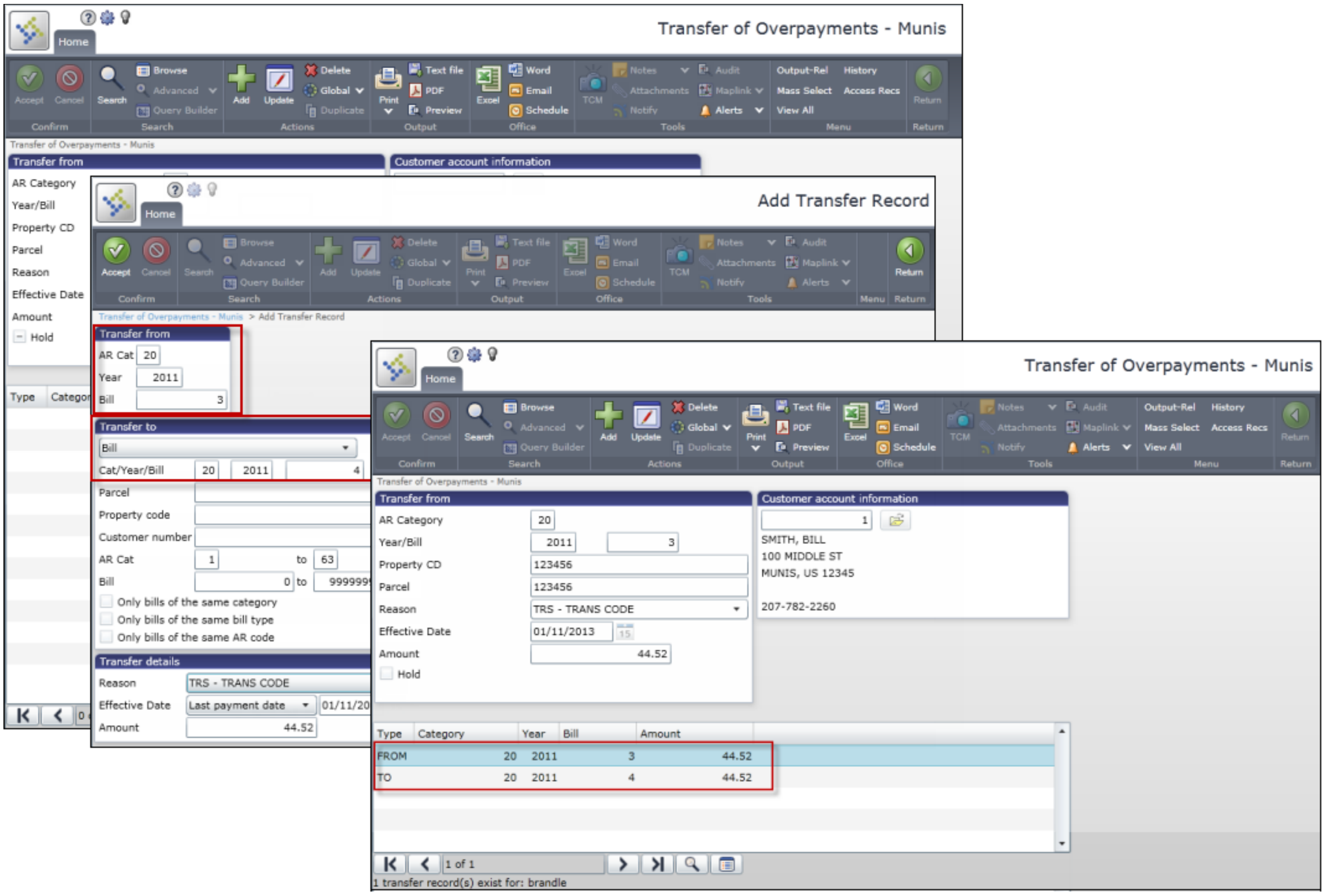
The Refund Options group provides actions for refunding amounts that are overpaid through the lockbox import process. The group includes the following:

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



Transfer of Overpayments

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

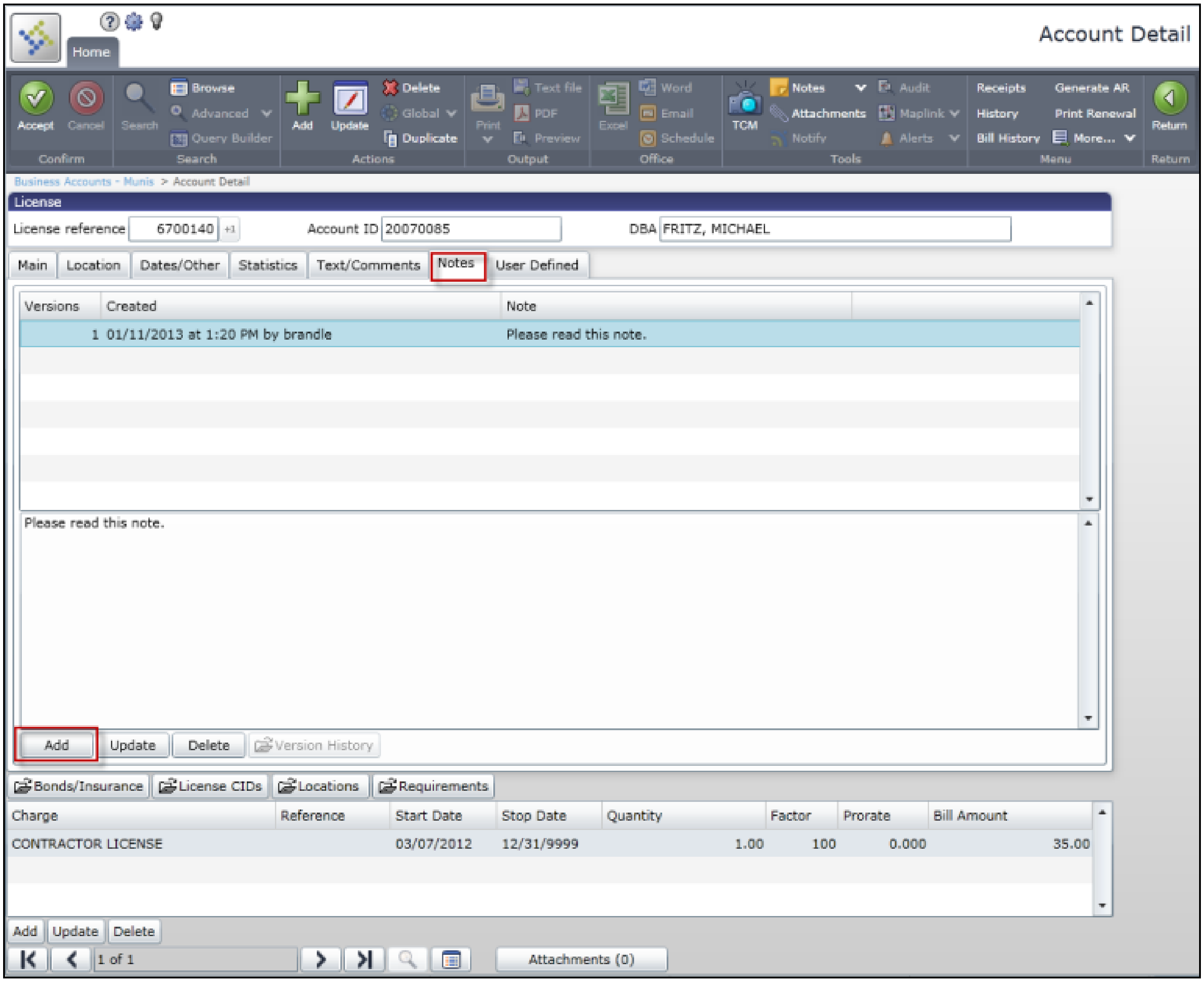


Business Licenses

The following changes apply to Munis Business Licenses programs.

Business Accounts

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

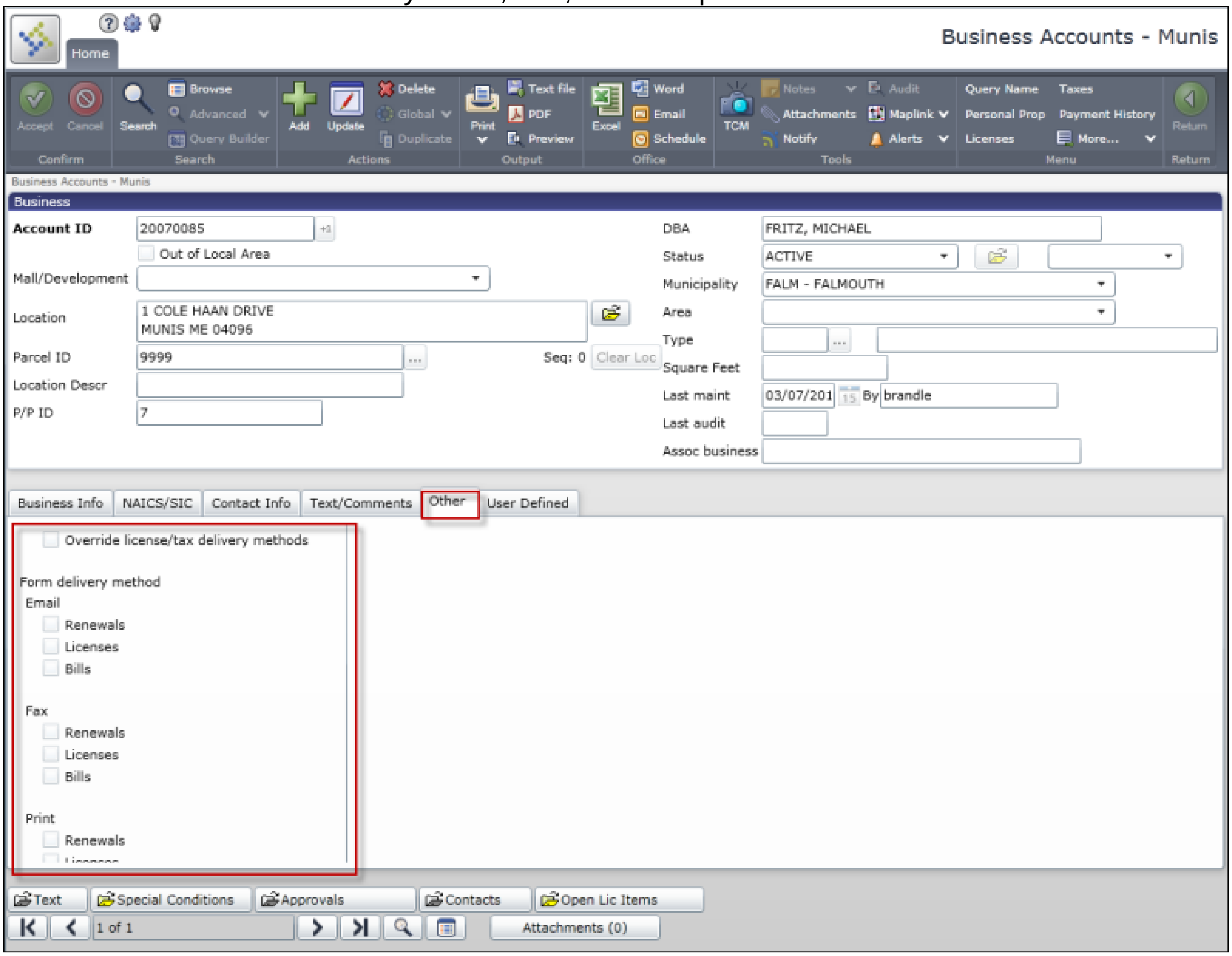


Business Accounts, Business License Settings

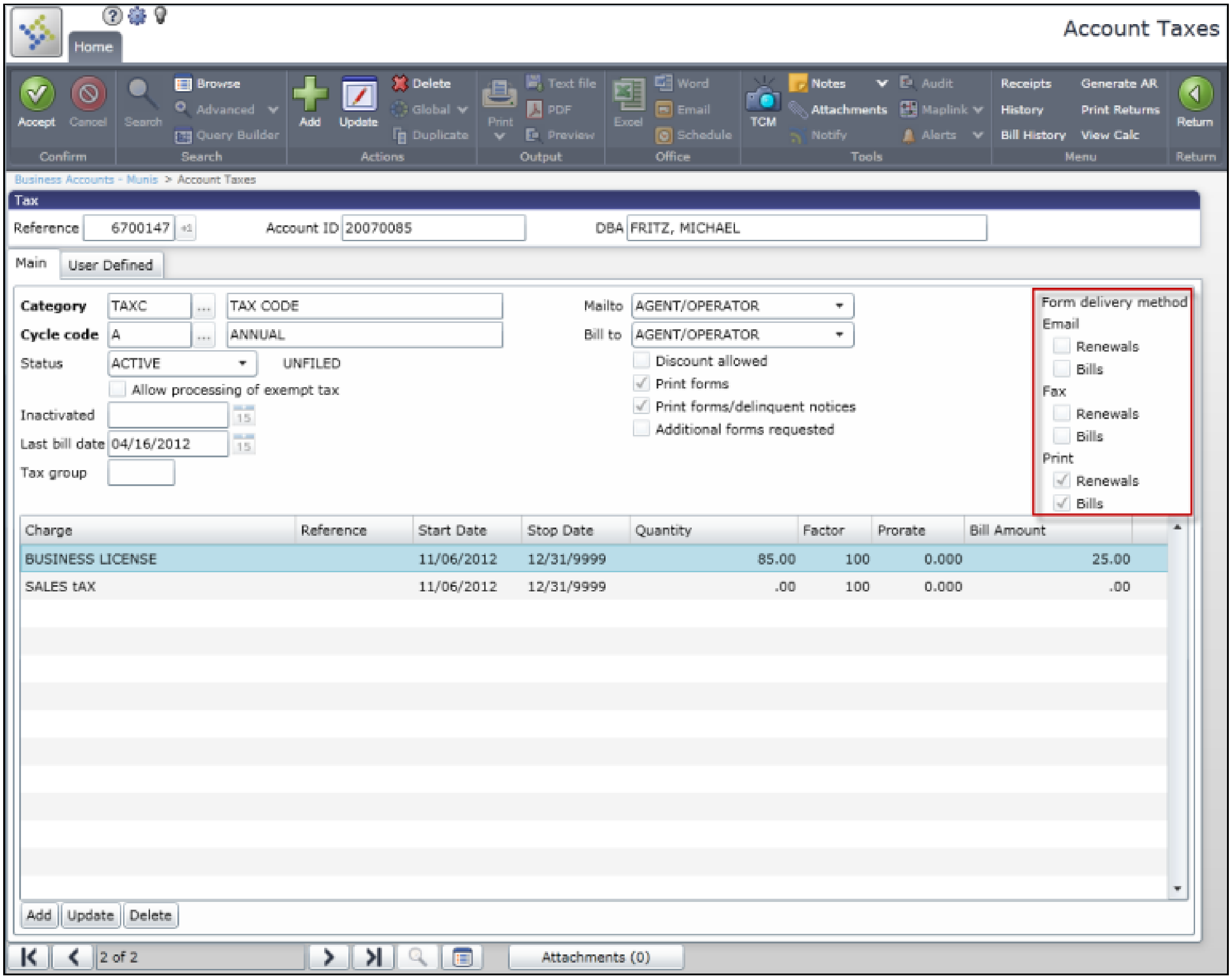
Override Delivery Method options are available for business licenses, license renewals, and bills in Business Accounts and Business License Settings, allowing you to indicate if licenses, renewals, or bills are to be sent by email or fax, or if the licenses, renewals, or bills are to be printed using a Munis form.

Business Accounts

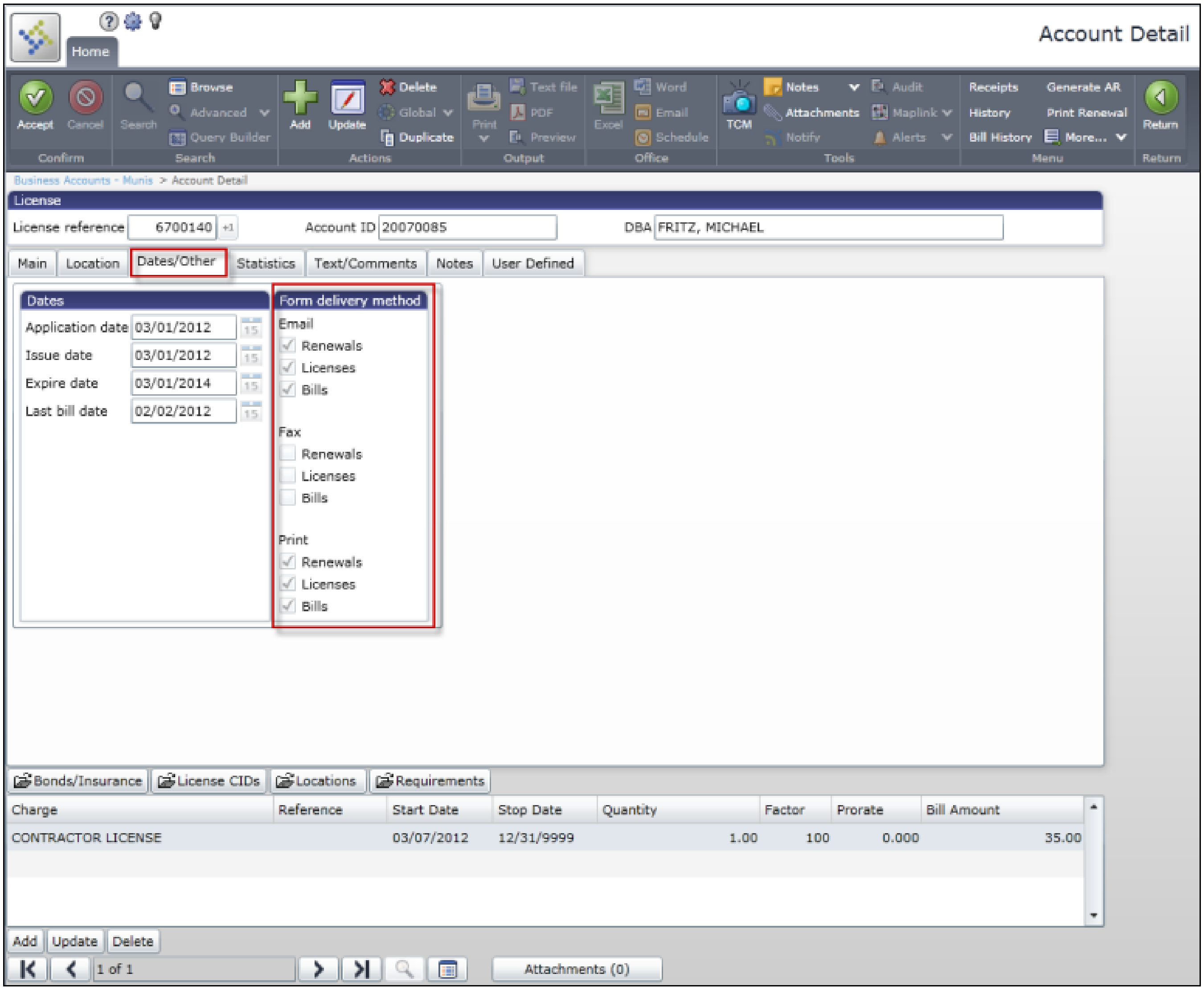
The Other tab contains the Override License/Tax Delivery Methods check box that specifies the override delivery methods at the Business Account level. In the Form Delivery Method group on the Other tab, the Renewals, Licenses, and Bills check boxes allow you to specify if the licenses or taxes are sent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



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

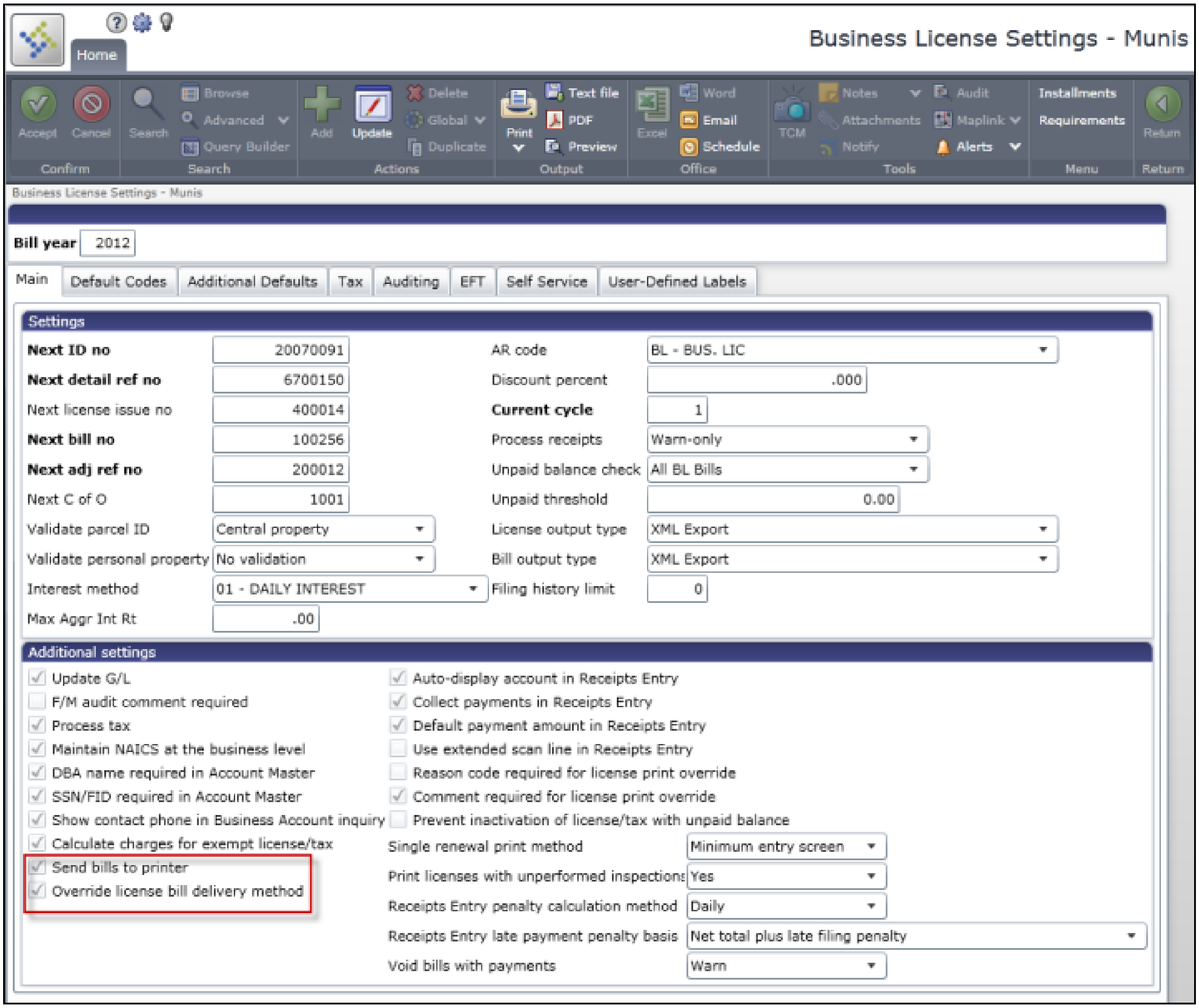


On the Licenses (Account Detail) screen, the Form Delivery Method check boxes for Renewals, Licenses, and Bills are available for Email, Fax, and Print records on the Dates/Other tab.



Business License Settings:

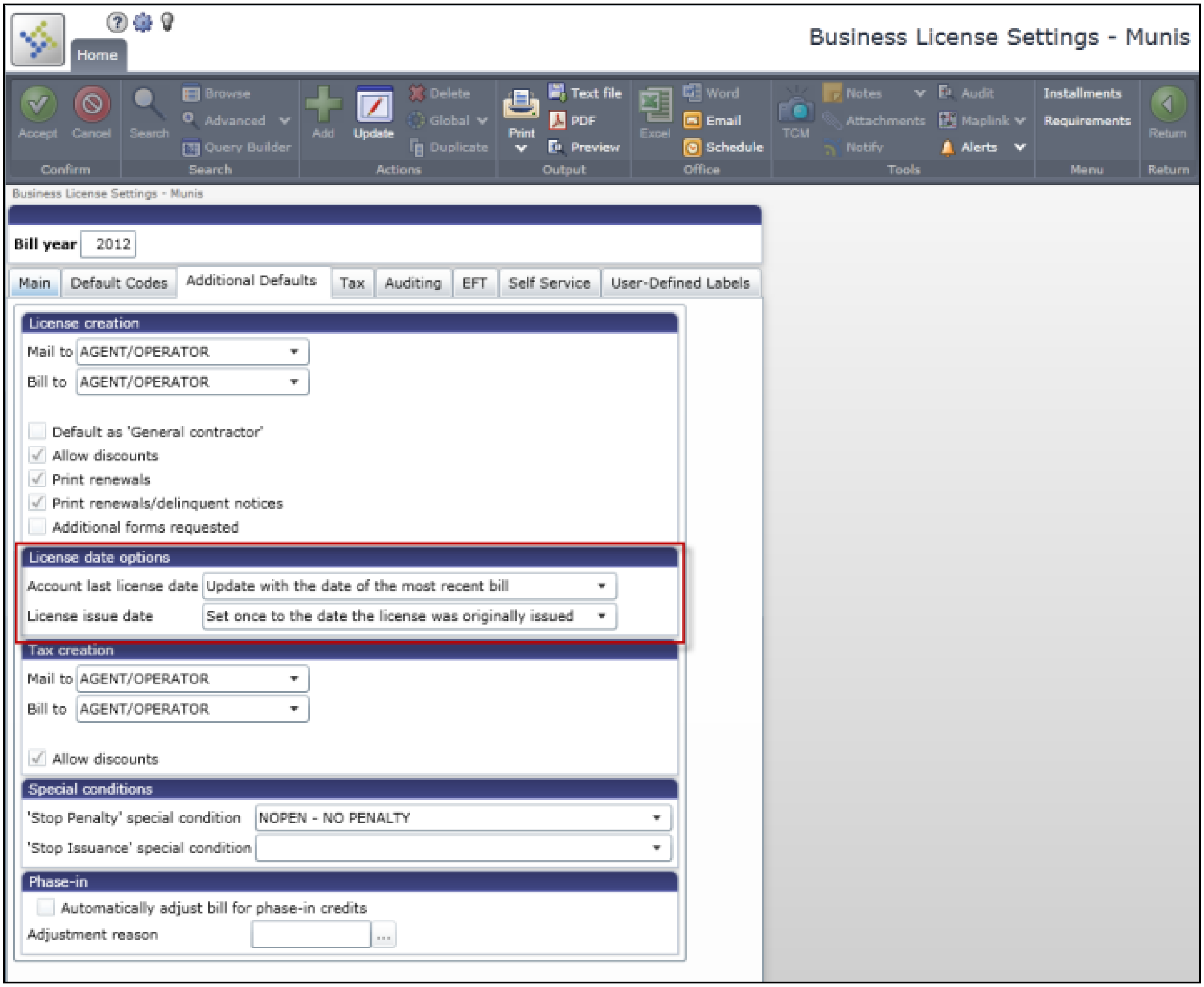
The Send Bills to Printer and Override License Bill Delivery Method check boxes are available in the Additional Settings group on the Main tab of Business License Settings, allowing you to override the Email, Fax, and Print check boxes for Bills on the Account level.



Business License Settings

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

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

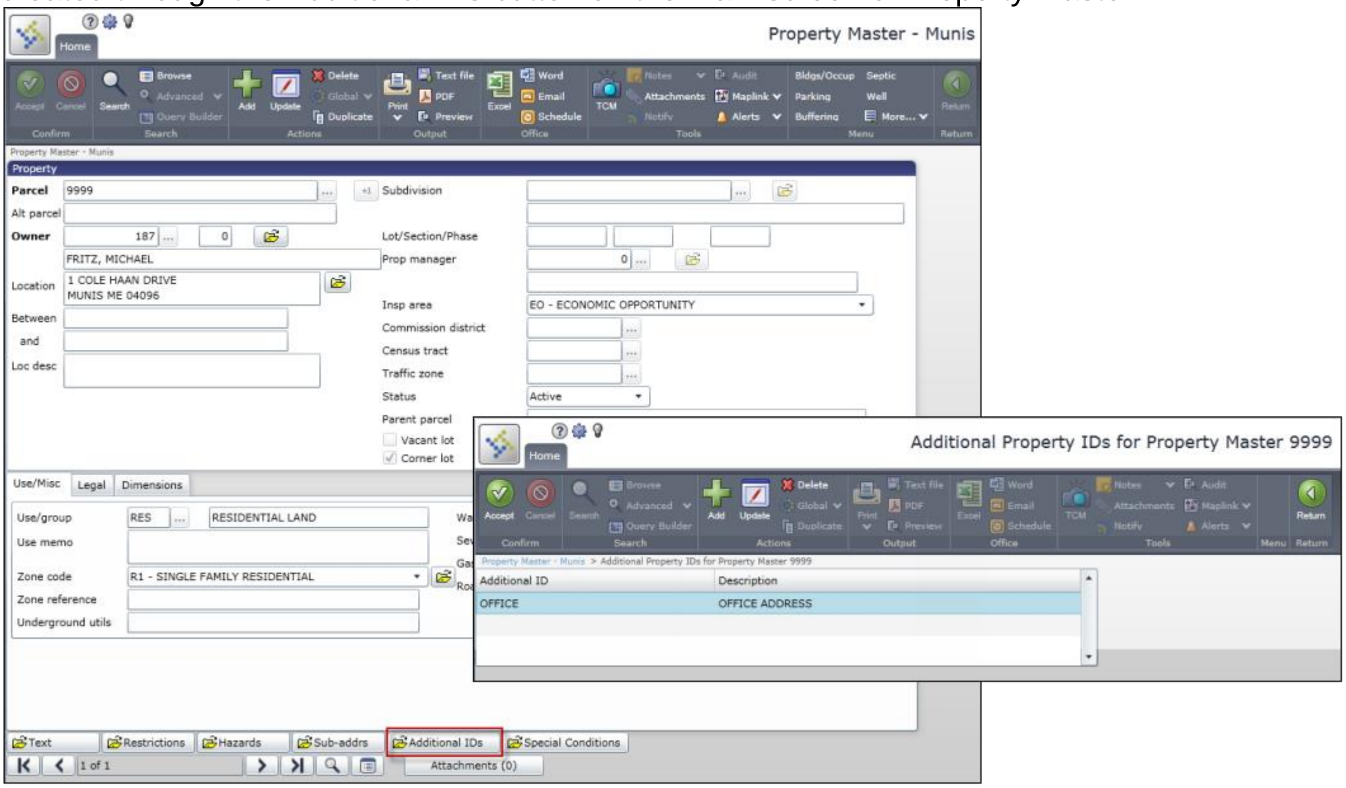

Business License Settings - Munis
Home
Accept
Cancel
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Print
Text file
PDF
Preview
Excel
Word
Email
Schedule
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Installments
Requirements
Return
Confirm
Search
Actions
Output
Office
Tools
Menu
Return
Business License Settings - Munis
Bill year 2012
Main
Default Codes
Additional Defaults
Tax
Auditing
EFT
Self Service
User-Defined Labels
License creation
Mail to AGENT/OPERATOR
Bill to AGENT/OPERATOR
Default as 'General contractor'
Allow discounts
Print renewals
Print renewals/delinquent notices
Additional forms requested
License date options
Account last license date Update with the date of the most recent bill
License issue date Set once to the date the license was originally issued
Tax creation
Mail to AGENT/OPERATOR
Bill to AGENT/OPERATOR
Allow discounts
Special conditions
'Stop Penalty' special condition NOPEN - NO PENALTY
'Stop Issuance' special condition
Phase-in
Automatically adjust bill for phase-in credits
Adjustment reason

Central Property

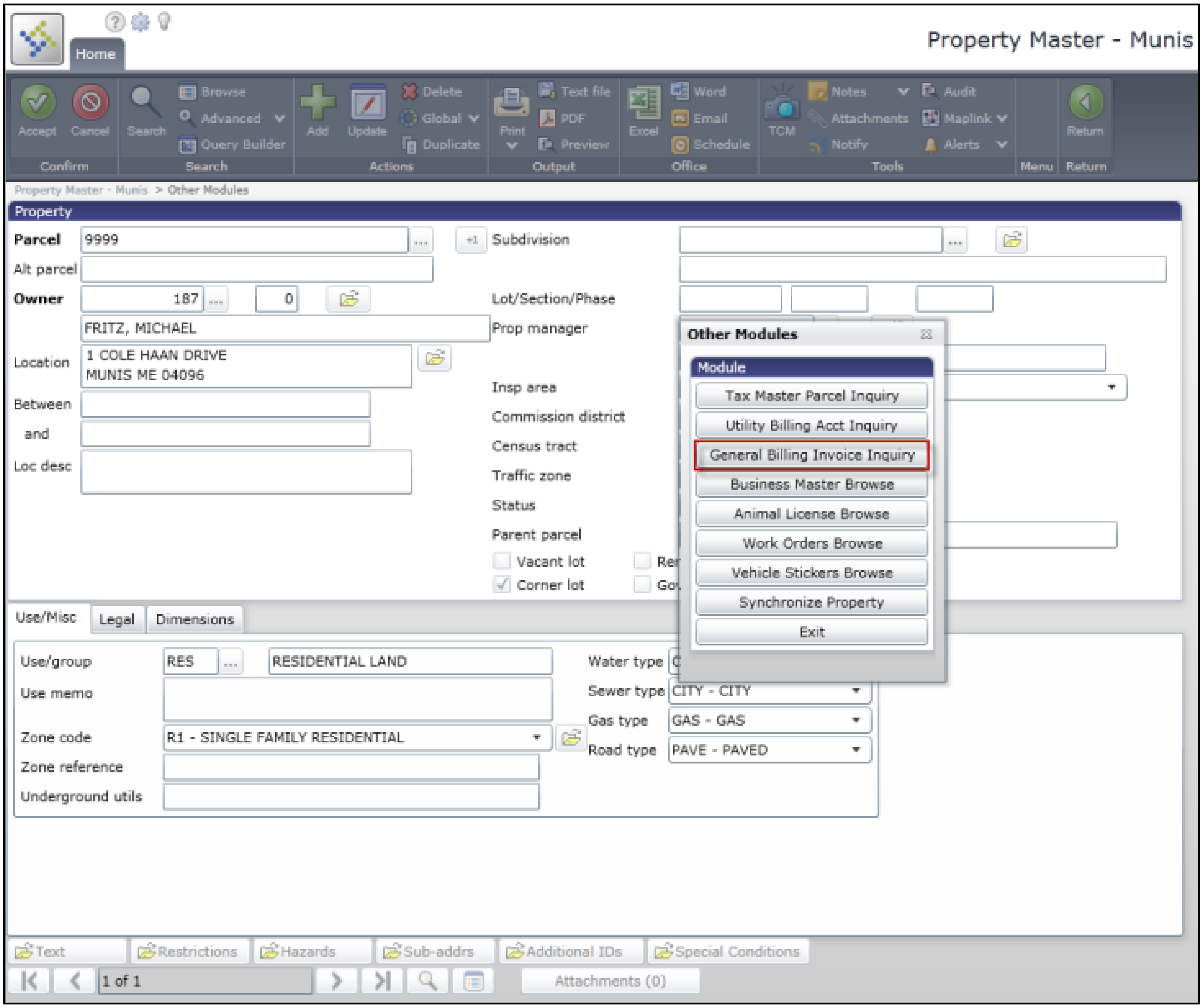
The following changes apply to Munis Central Property programs.

Property Master

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



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



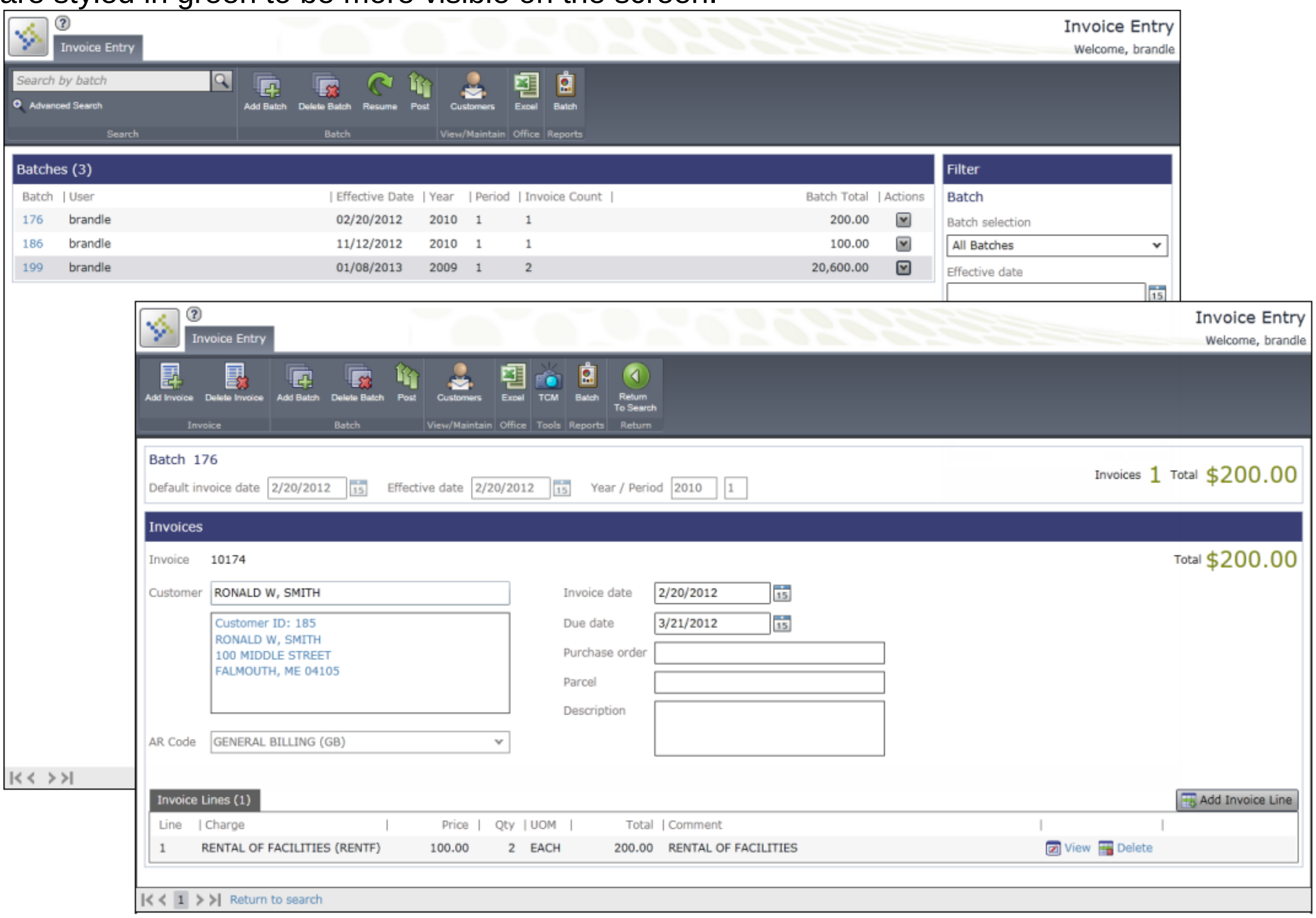
Home
Property Master - Munis
Accept
Cancel
Confirm
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Actions
Print
Text file
PDF
Preview
Output
Excel
Word
Email
Schedule
Office
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Tools
Menu
Return
Property Master - Munis > Other Modules
Property
Parcel
9999
Subdivision
Alt parcel
Owner
187
0
Lot/Section/Phase
FRITZ, MICHAEL
Prop manager
Location
1 COLE HAAN DRIVE
MUNIS ME 04096
Insp area
Between
Commission district
and
Census tract
Loc desc
Traffic zone
Status
Parent parcel
Vacant lot
Corner lot
Other Modules
Module
Tax Master Parcel Inquiry
Utility Billing Acct Inquiry
General Billing Invoice Inquiry
Business Master Browse
Animal License Browse
Work Orders Browse
Vehicle Stickers Browse
Synchronize Property
Exit
Use/Misc
Legal
Dimensions
Use/group
RES
RESIDENTIAL LAND
Water type
Use memo
Sewer type
CITY - CITY
Zone code
R1 - SINGLE FAMILY RESIDENTIAL
Gas type
GAS - GAS
Zone reference
Road type
PAVE - PAVED
Underground utils
Text
Restrictions
Hazards
Sub-addrs
Additional IDs
Special Conditions
1 of 1
Attachments (0)

General Billing Enhancements

The following changes apply to Munis General Billing programs.

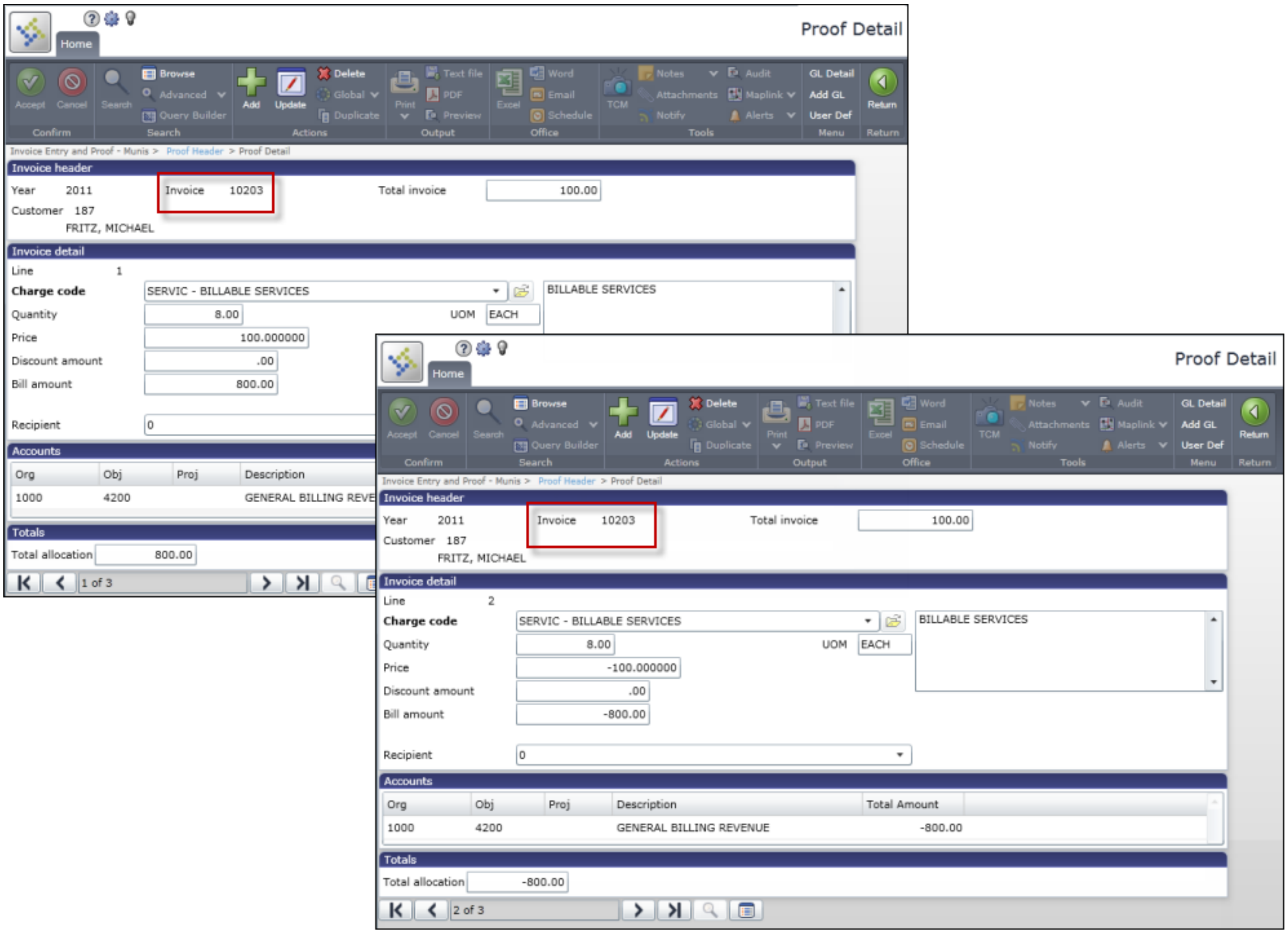
Invoice Entry

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

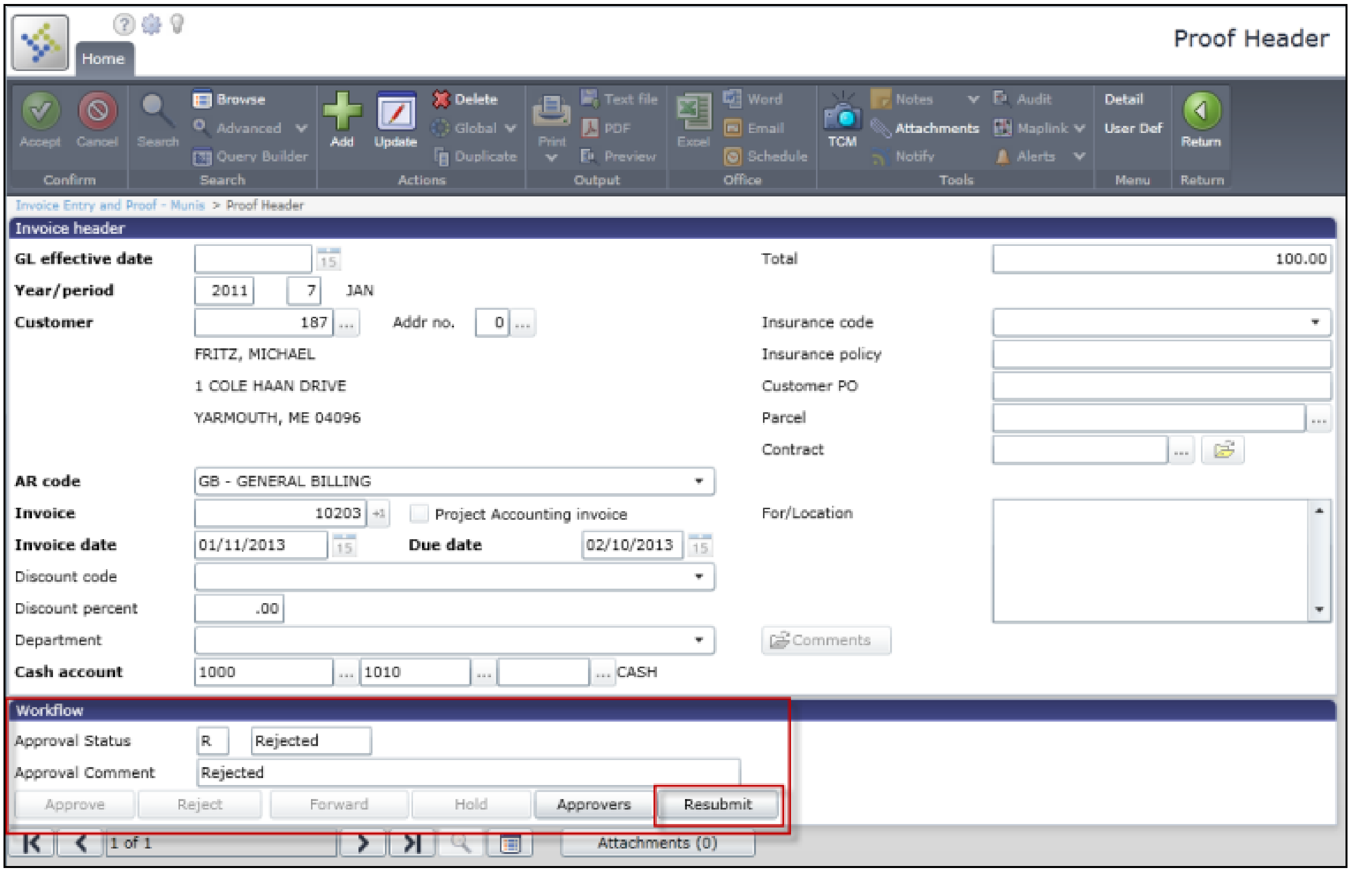


Invoice Entry and Proof

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

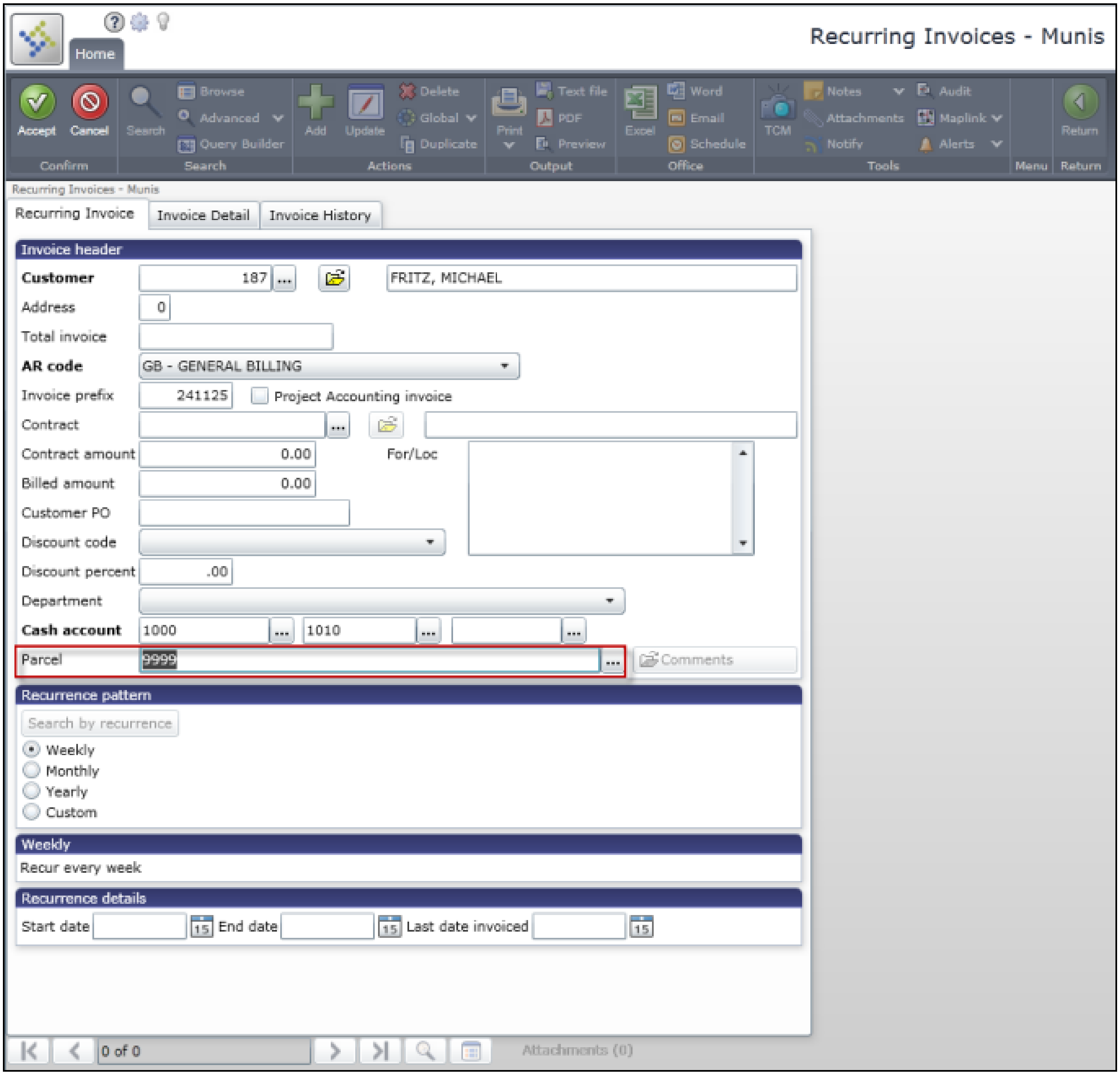


The Resubmit button is available for workflow processing in Invoice Entry and Proof. When an invoice approval is rejected, the Resubmit button can be used to resubmit the approval. When you click Resubmit, the status of the Workflow item returns to Pending.



Recurring Invoices

The program validates a parcel ID if Central Property is selected in the Validate Parcel ID list in General Billing Settings. The field help button in the Parcel box opens Location Help where you can search for a property.

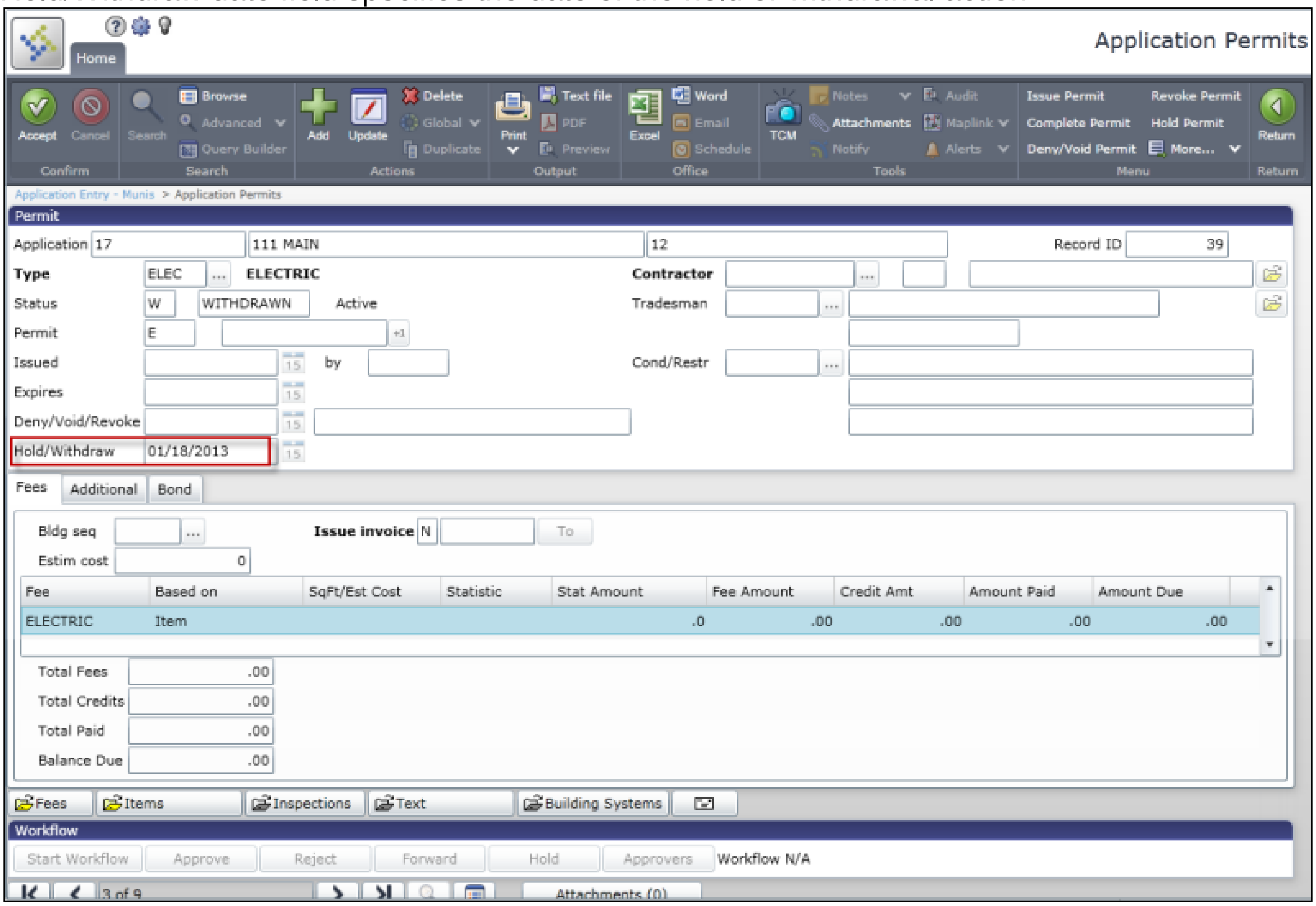

Recurring Invoices - Munis
Home
Accept
Cancel
Confirm
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Actions
Print
Text file
PDF
Preview
Output
Excel
Word
Email
Schedule
Office
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Tools
Menu
Return
Recurring Invoice
Invoice Detail
Invoice History
Invoice header
Customer 187
FRITZ, MICHAEL
Address 0
Total invoice
AR code GB - GENERAL BILLING
Invoice prefix 241125
Project Accounting invoice
Contract
Contract amount 0.00
For/Loc
Billed amount 0.00
Customer PO
Discount code
Discount percent .00
Department
Cash account 1000 1010
Parcel 9999
Comments
Recurrence pattern
Search by recurrence
Weekly
Monthly
Yearly
Custom
Weekly
Recur every week
Recurrence details
Start date
End date
Last date invoiced
0 of 0
Attachments (0)

Permits and Code Enforcement

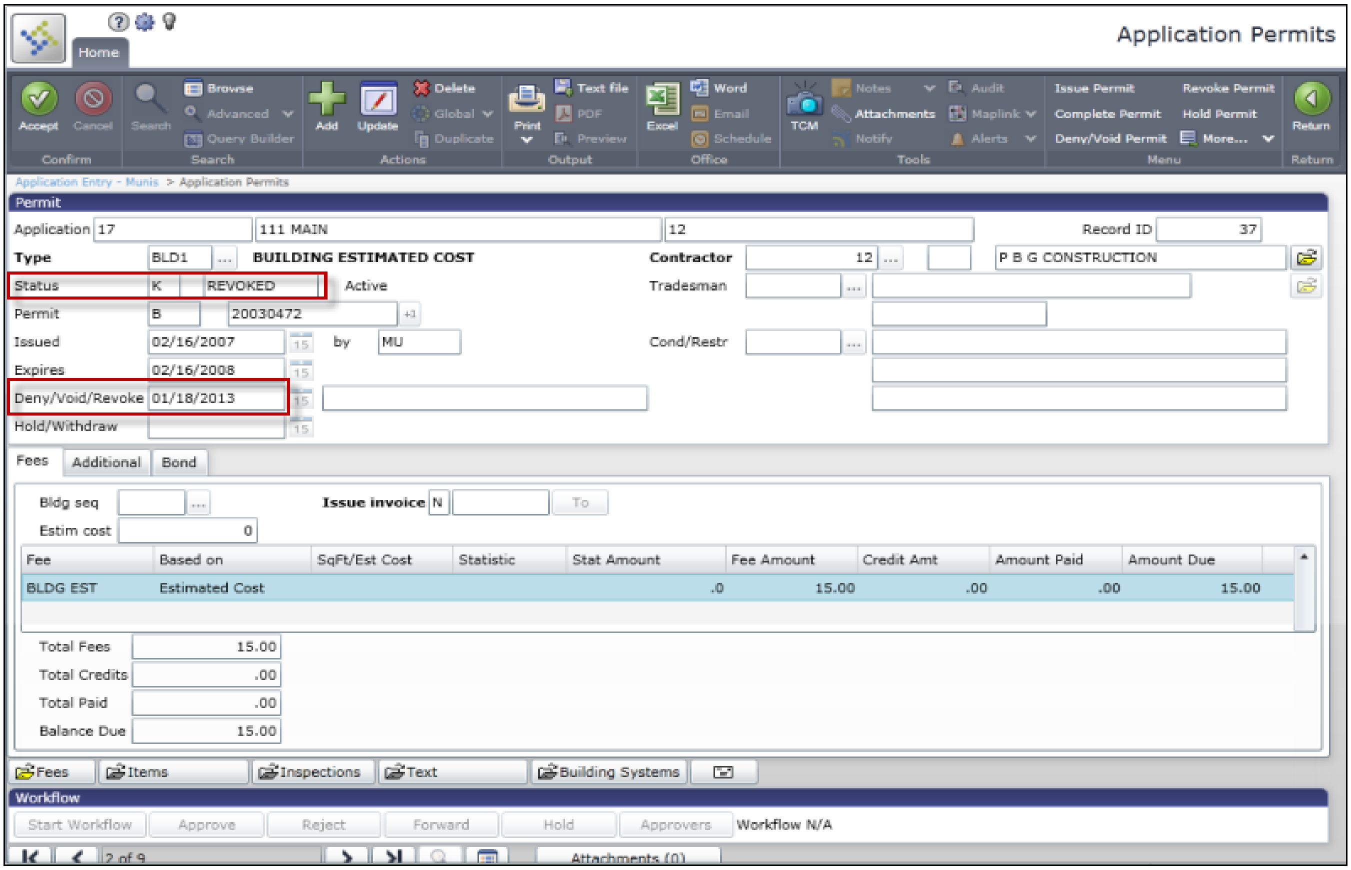
The following changes apply to Munis Permits and Code Enforcement programs.

Application Entry

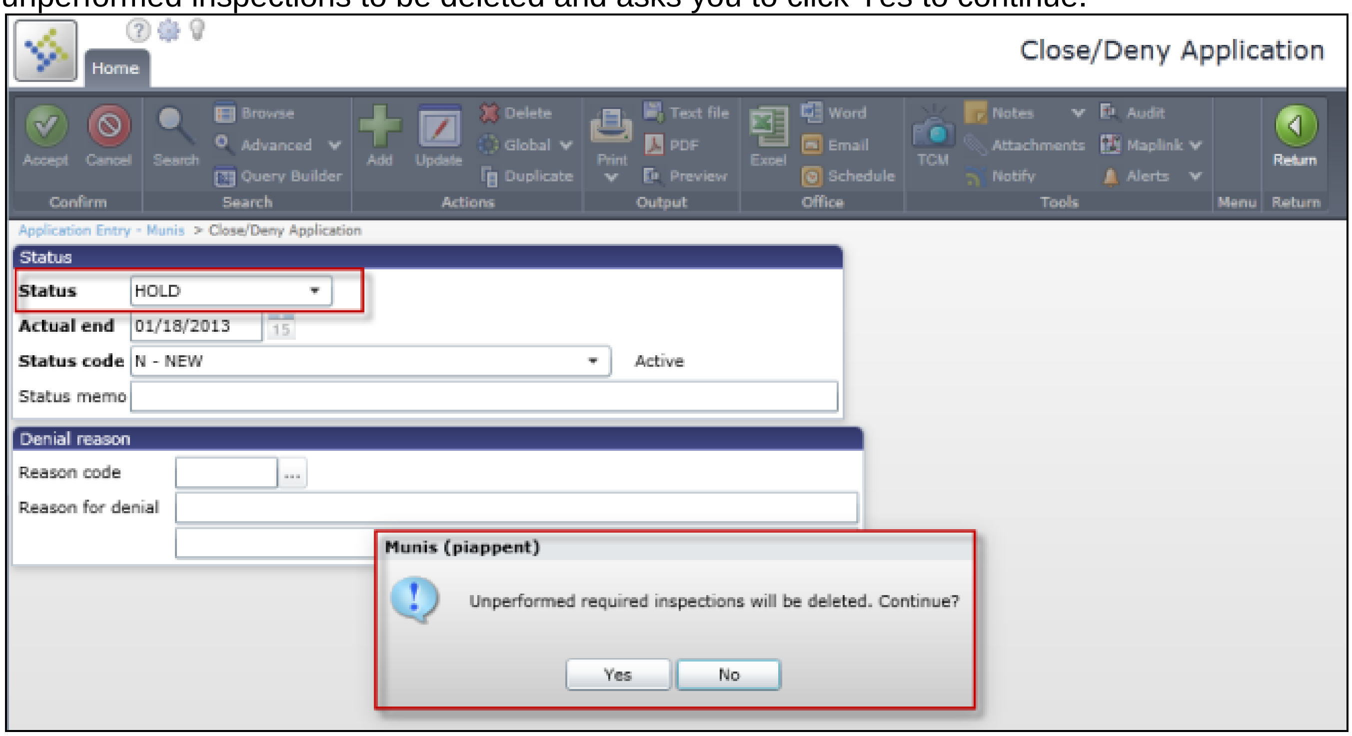
When you click Hold Permit or Withdraw Permit on the Application Permits screen, the Hold/Withdraw date field specifies the date of the hold or withdrawal action.



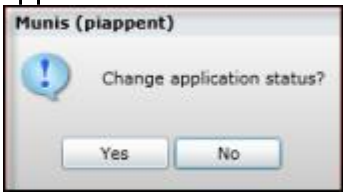
The Revoke Permit button specifies the date the permit is revoked in the Deny/Void/Revoke date field. The status of the permit must be Issued in order to use the Revoke Permit feature.



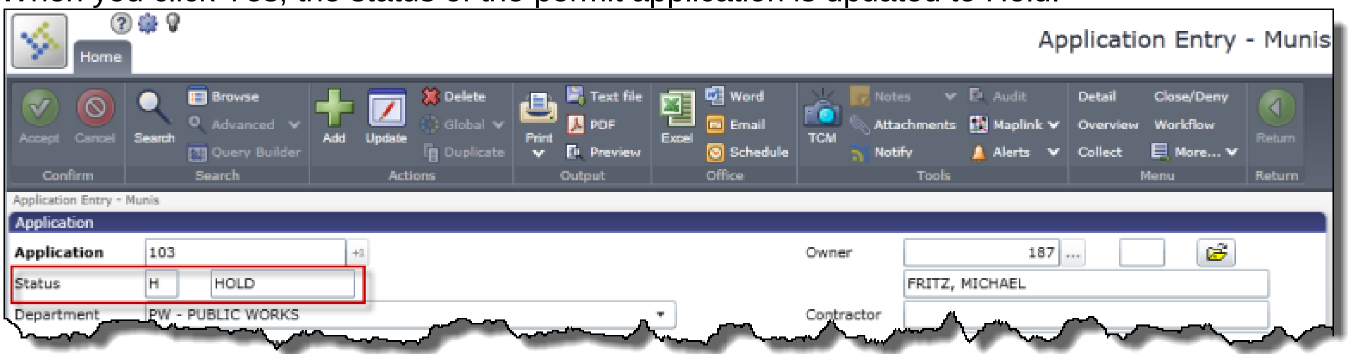
The Hold status is available for the Status box on the main screen. When you click the Close/Deny button and set the Status to Hold, the program displays the message for unperformed inspections to be deleted and asks you to click Yes to continue.



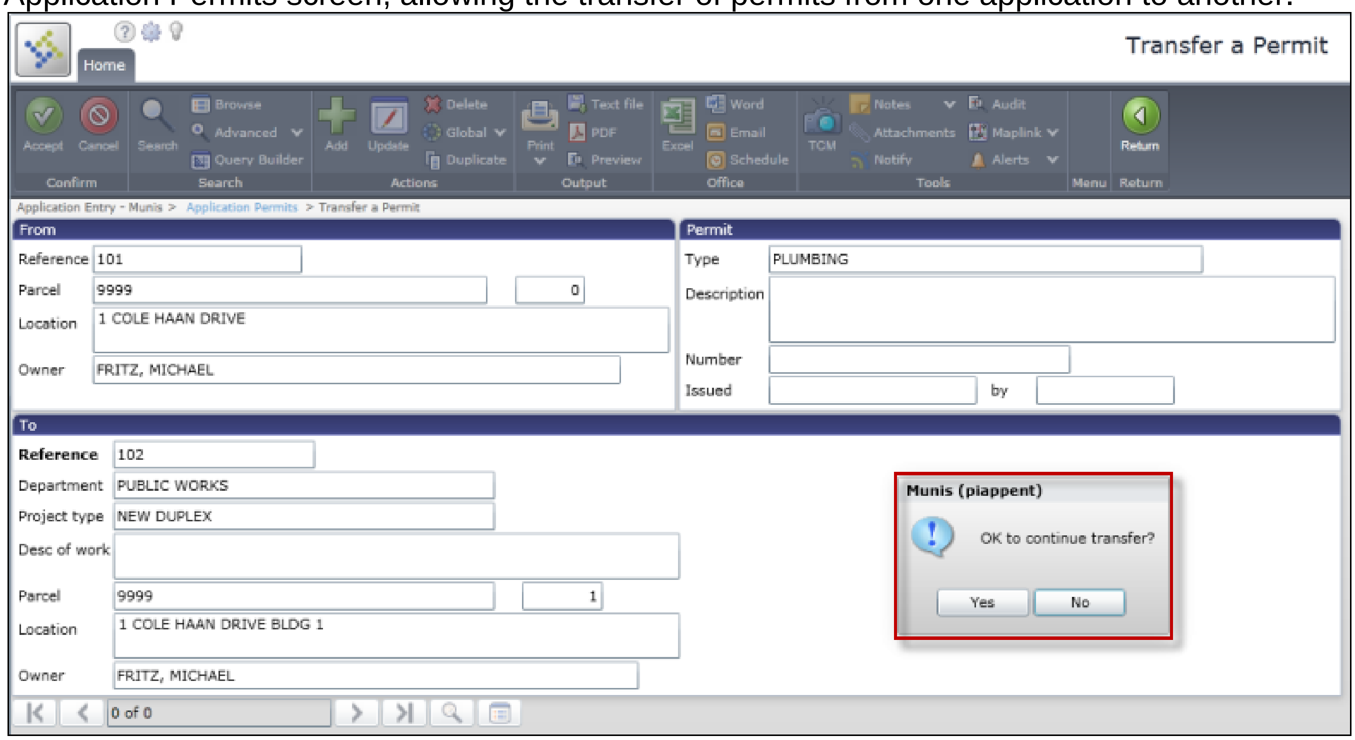
When you click Yes, the program displays a message asking to change the status of the application.



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

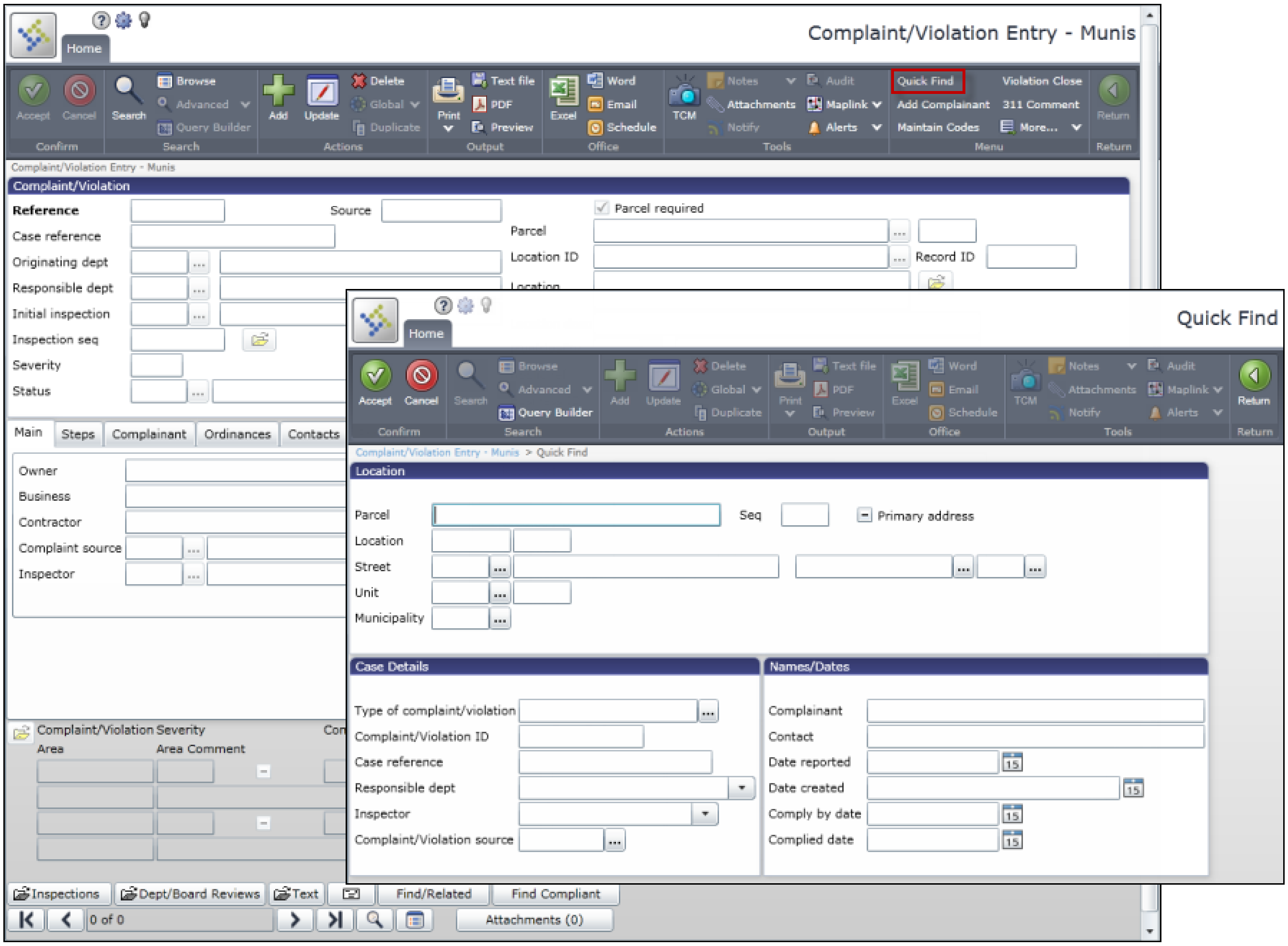


The Transfer a Permit screen is available when you click Transfer Permit through the Application Permits screen, allowing the transfer of permits from one application to another.



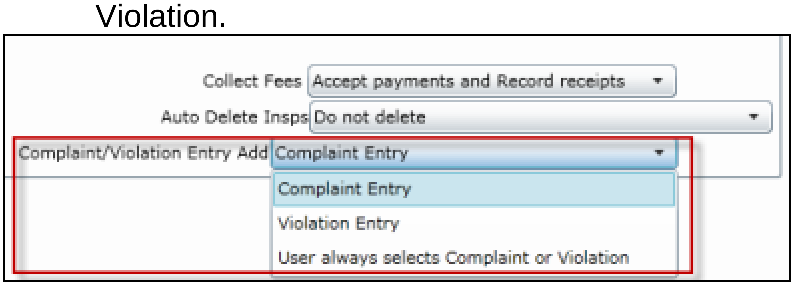
Complaint/Violation Entry

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



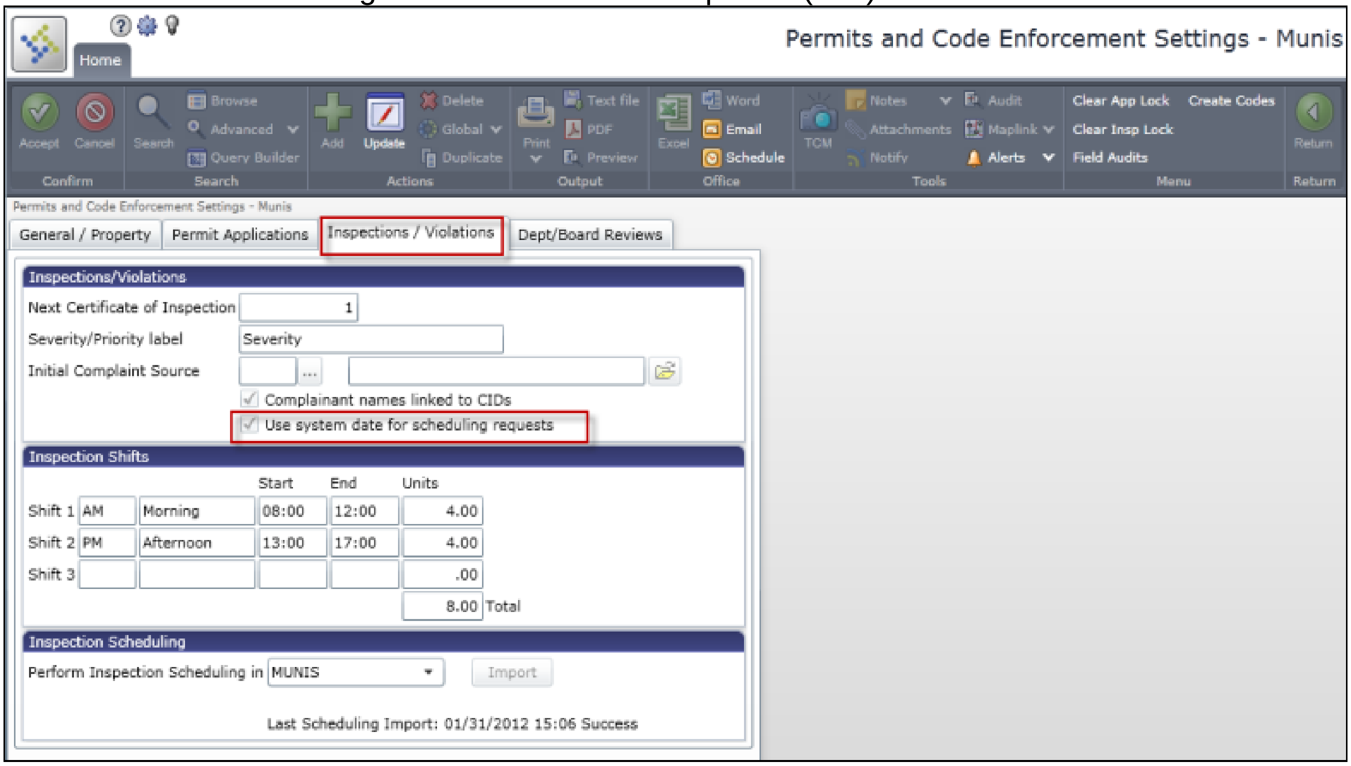
The Add screen allows you to enter complaints or violations, depending on your selected permissions on the Processing Role Permissions tab of Permits and Code Enforcement in Roles:

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



Permit and Code Enforcement Settings

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

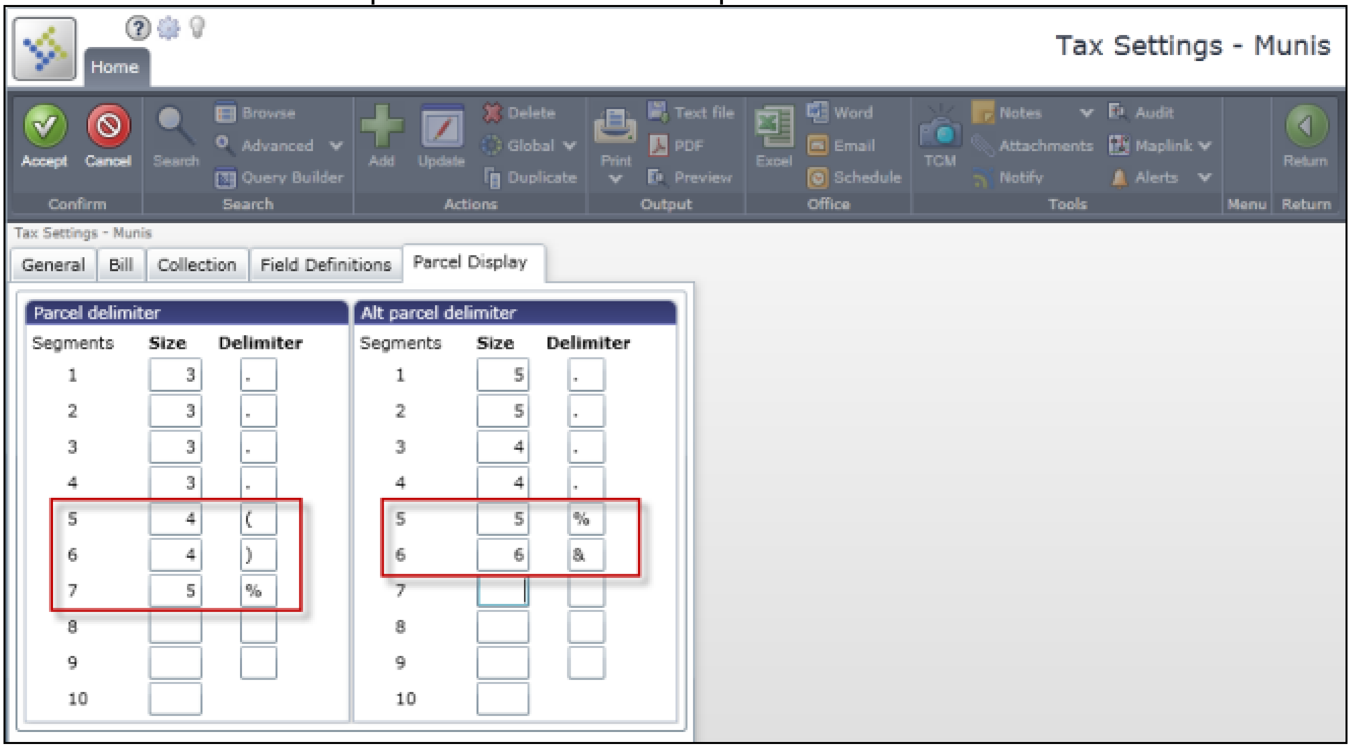


Tax

The following changes apply to Munis Tax programs.

Tax Settings

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

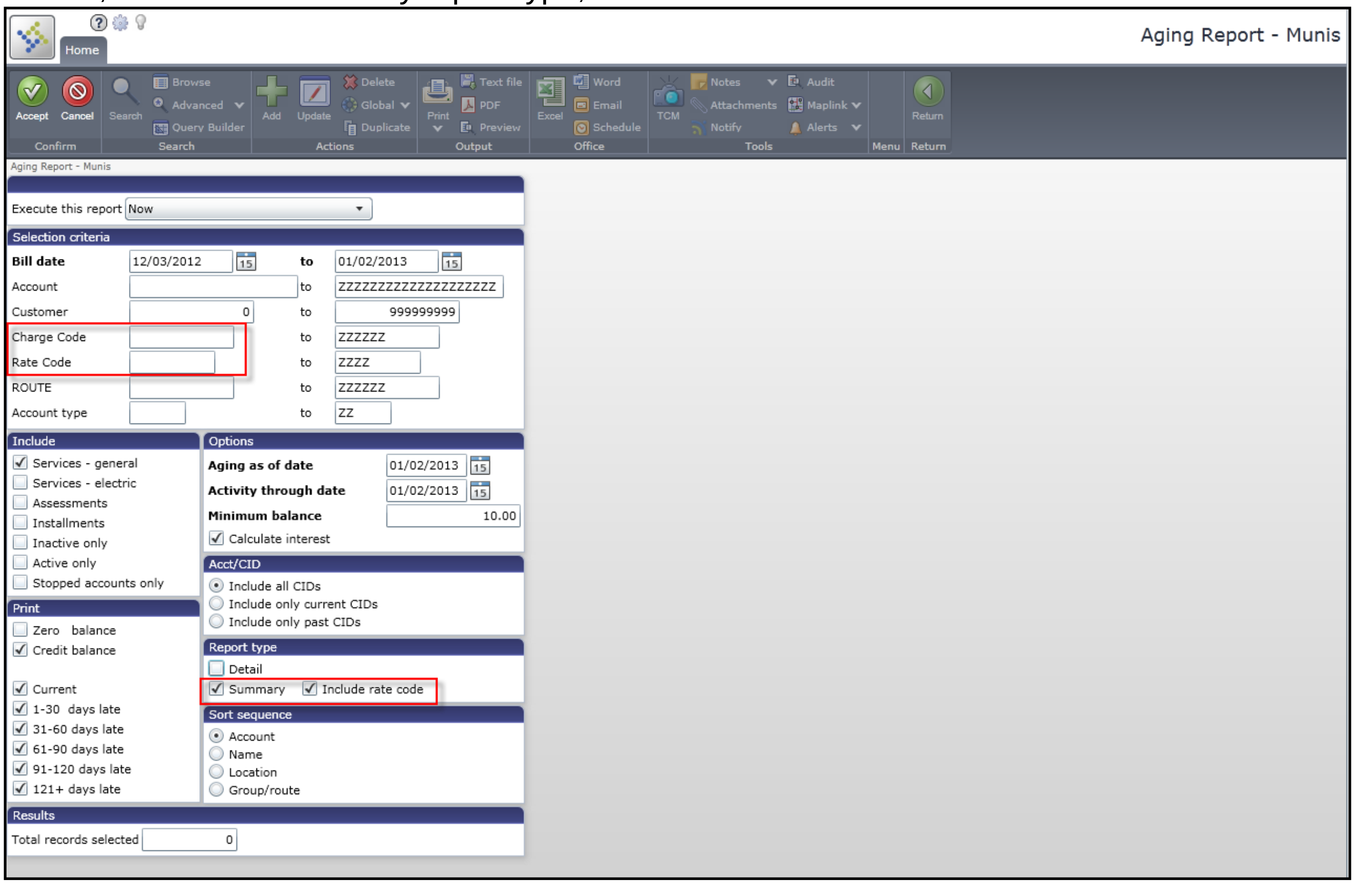


Utility Billing - CIS

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

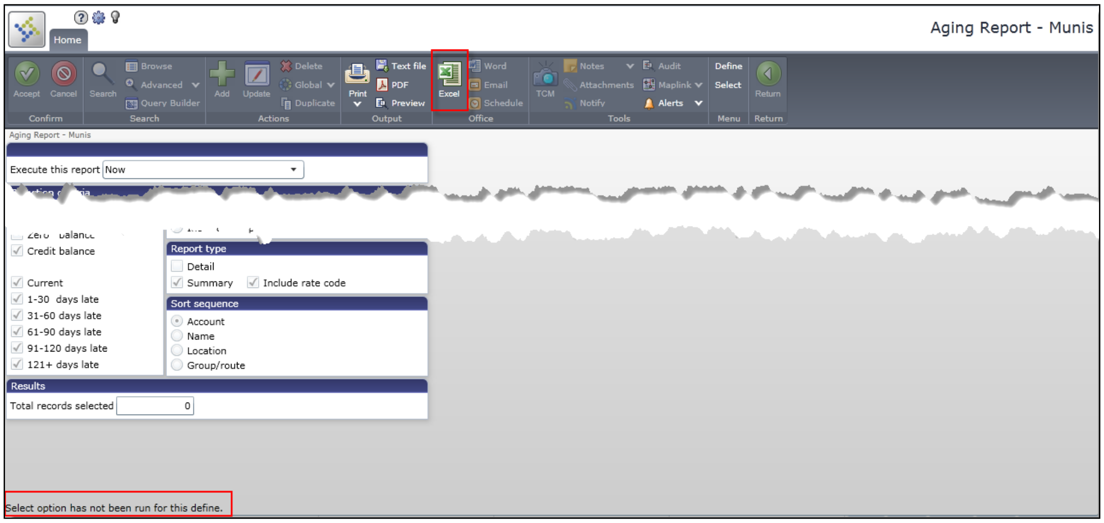
Aging Report

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



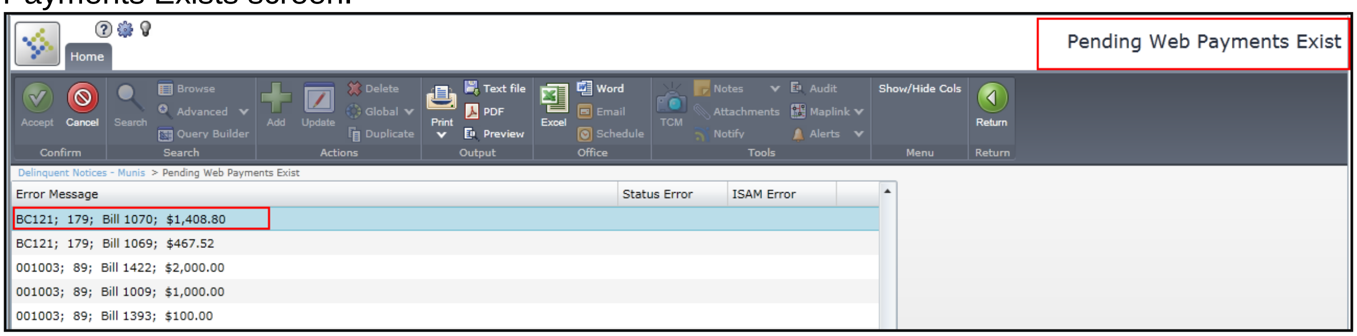
When the Include Rate Code check box is selected, the Summary Report groups selected data by service type, charge code, and rate code instead of simply by service type and charge code. The report includes the rate code and rate code description.

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



Apply Late Fees, Cutoff Process, Delinquent Notices

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



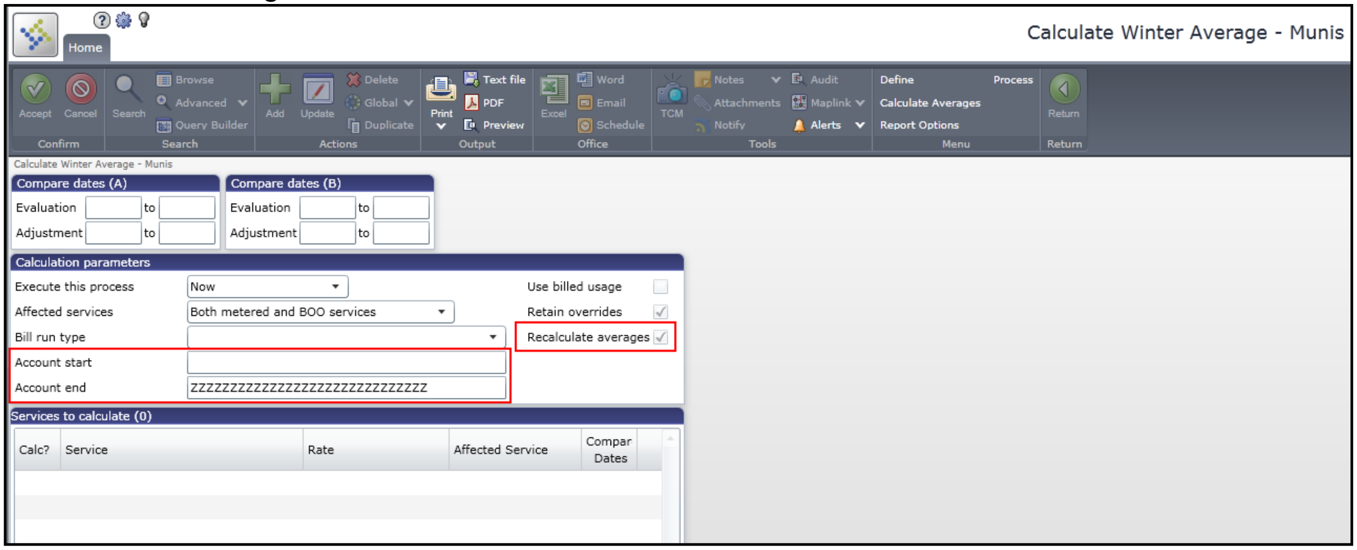
This screen identifies the account, the customer ID, the bill number, and the amount of the pending payment.

Calculate Charges

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

Calculate Winter Average

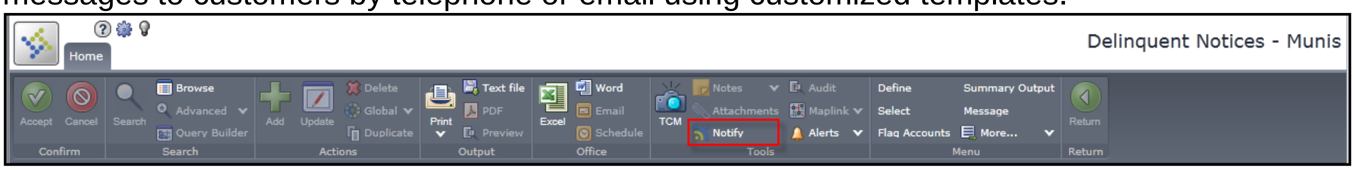
In the Calculate Winter Average program, the Calculation Parameters group includes the Recalculate Averages check box and the Account Start and End Date boxes.



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

Delinquent Notices

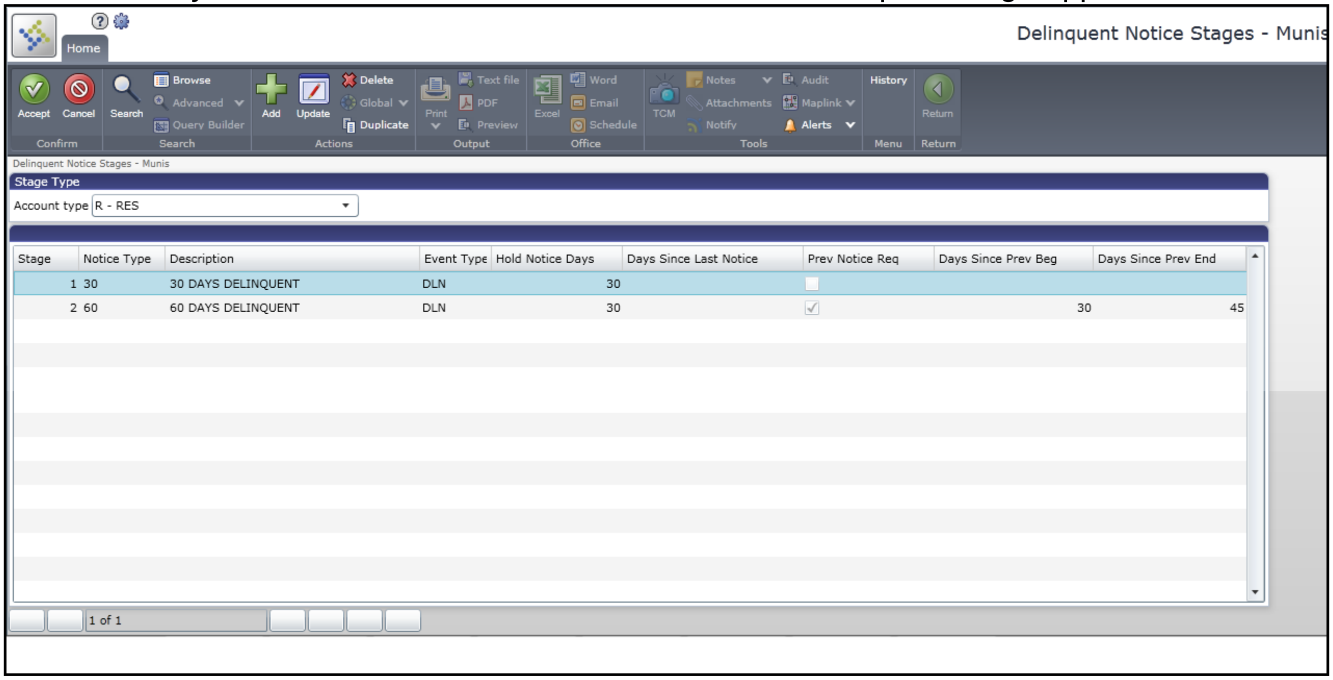
The Delinquent Notices program includes the Tyler Notify option, which sends automated messages to customers by telephone or email using customized templates.



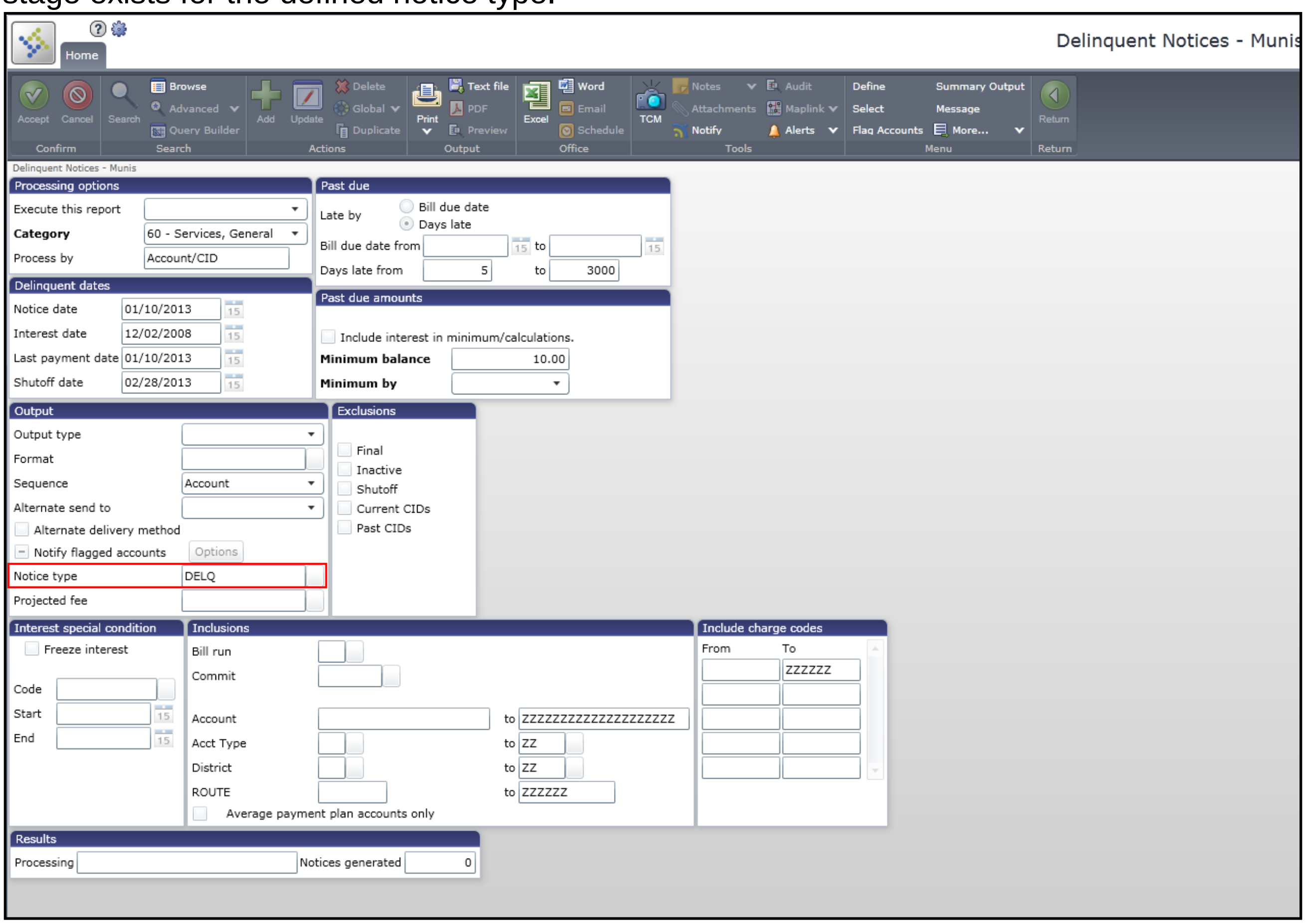
This feature requires that Tyler Notify is implemented by your organization.

Delinquent Notices Stages, Delinquent Notices, Cutoff Process

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

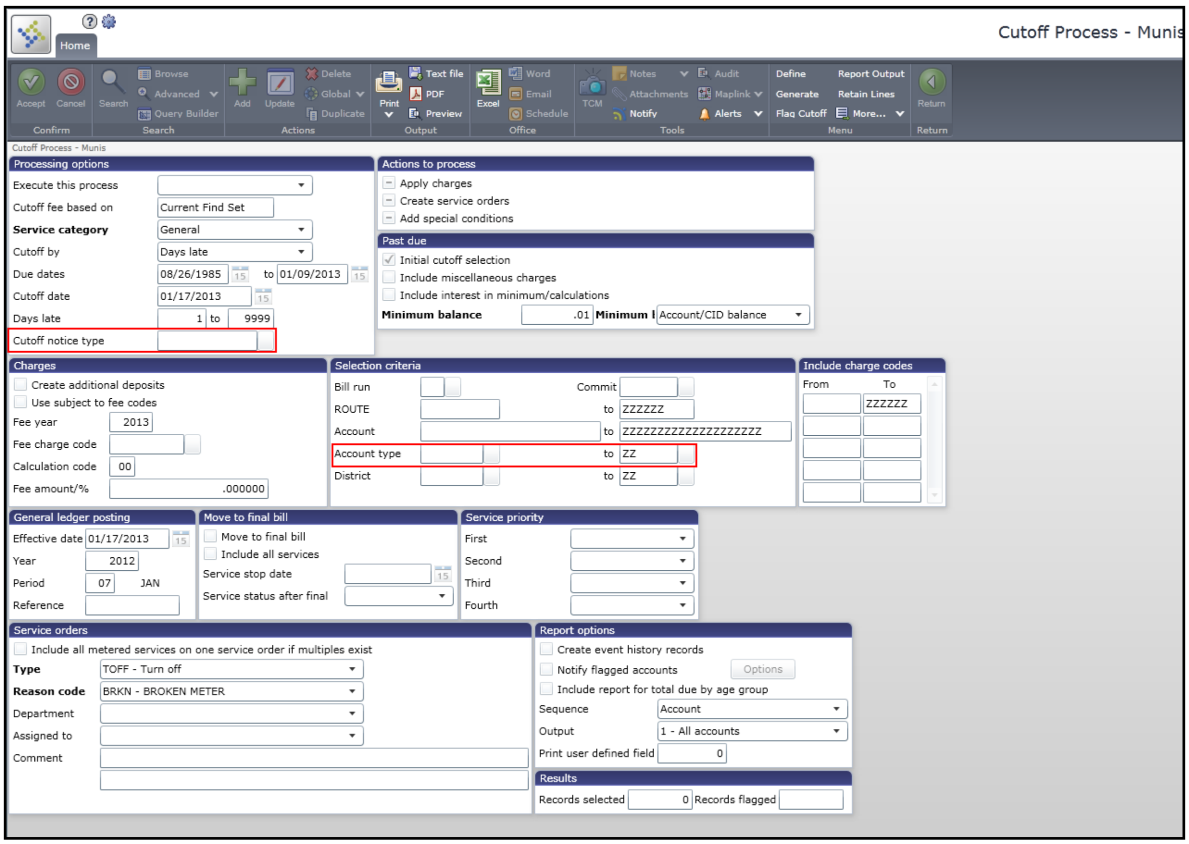


When processing notices, the Delinquent Notices program determines if a delinquent notice stage exists for the defined notice type.



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

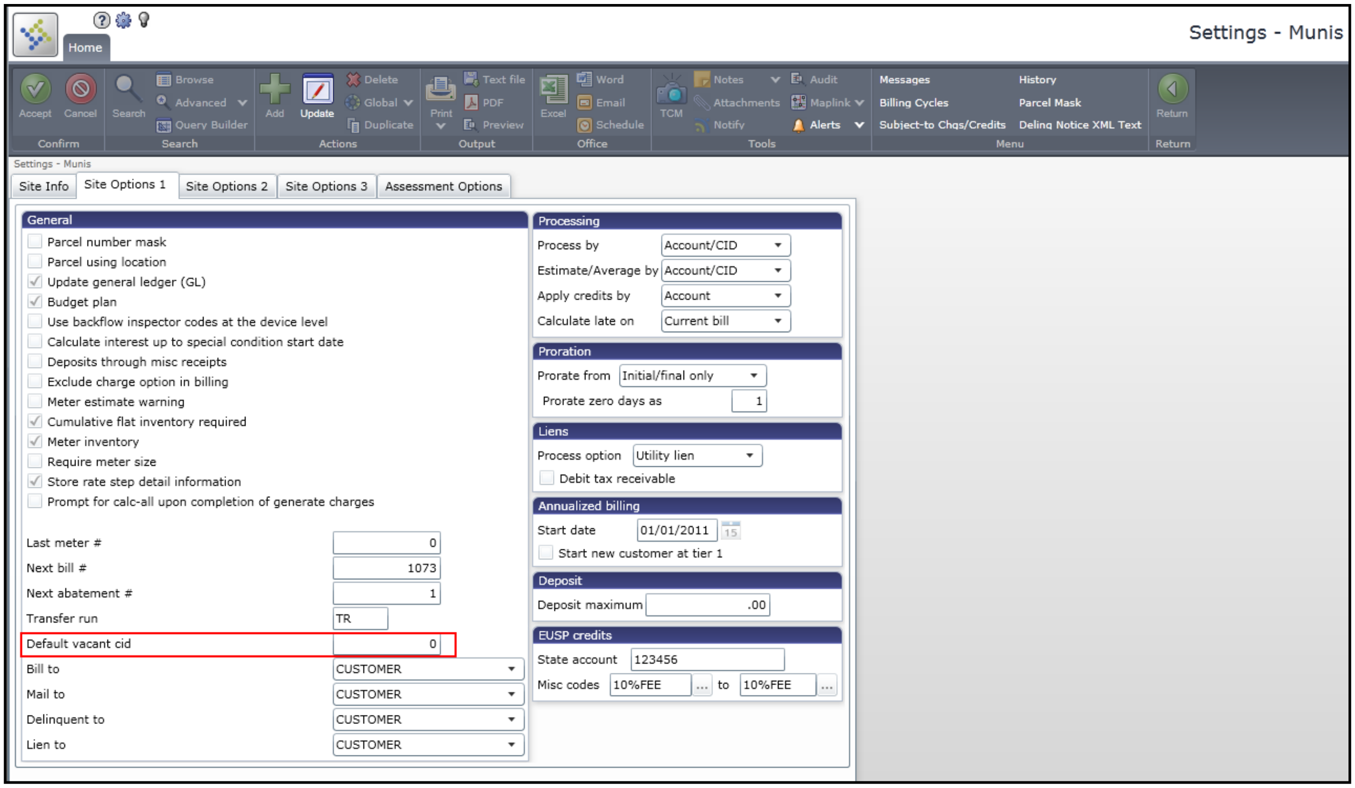
When the delinquent notice stages are complete, the Cutoff Process program identifies accounts for cutoff based on the value of the Cutoff Notify Type box, which defines the notice type. To identify account/CID records for cutoff process selection, the program searches for account/CID records with a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



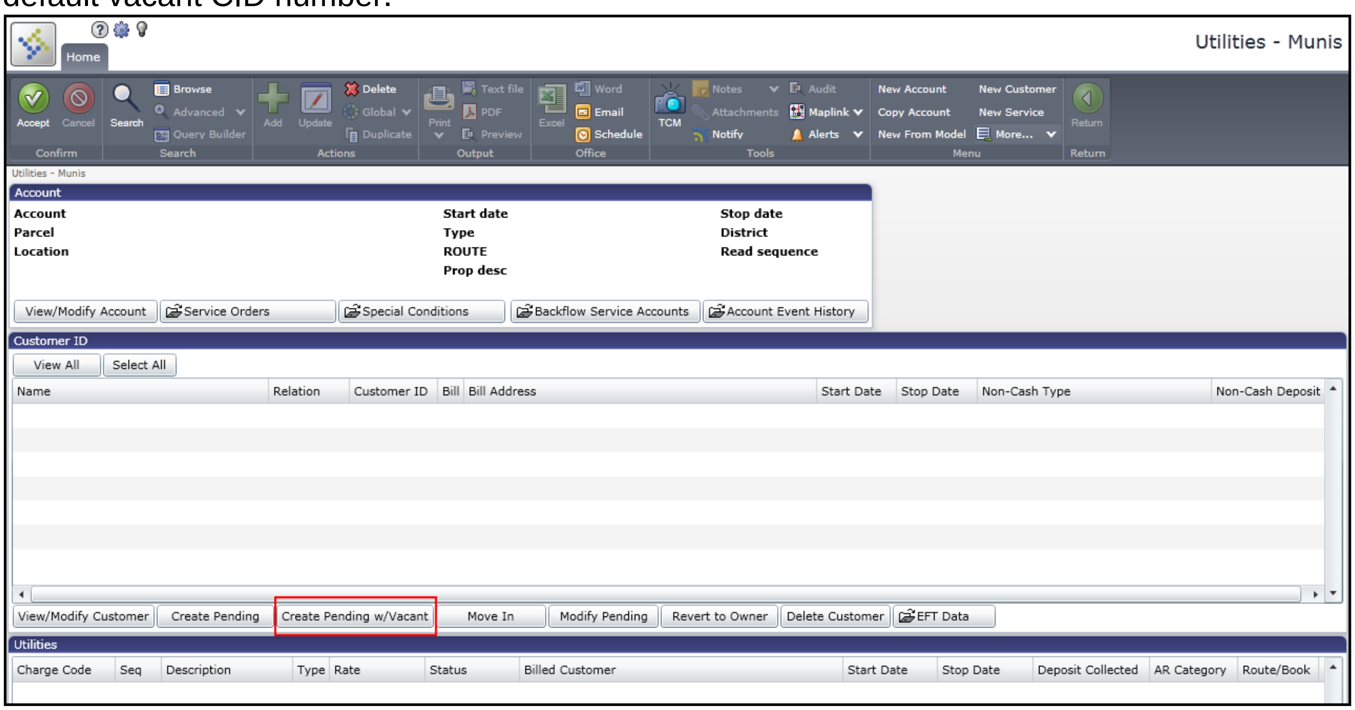
If the Cutoff Notify Type box is blank, or no stage is defined for the selected account type, the program does not use delinquent notice stages for processing.

UB Settings, Utilities

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



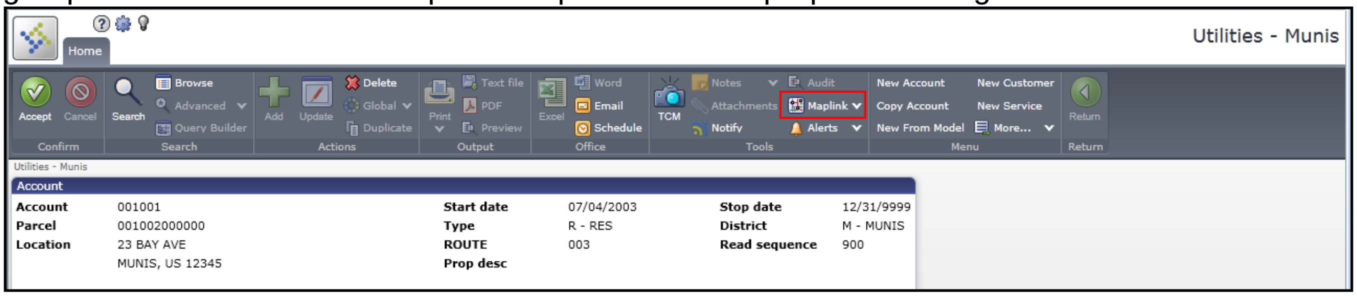
When you complete this box with a value that is not zero (0), the Utilities program provides the Create Pending with Vacant option, which completes the Create Pending process using the default vacant CID number.



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

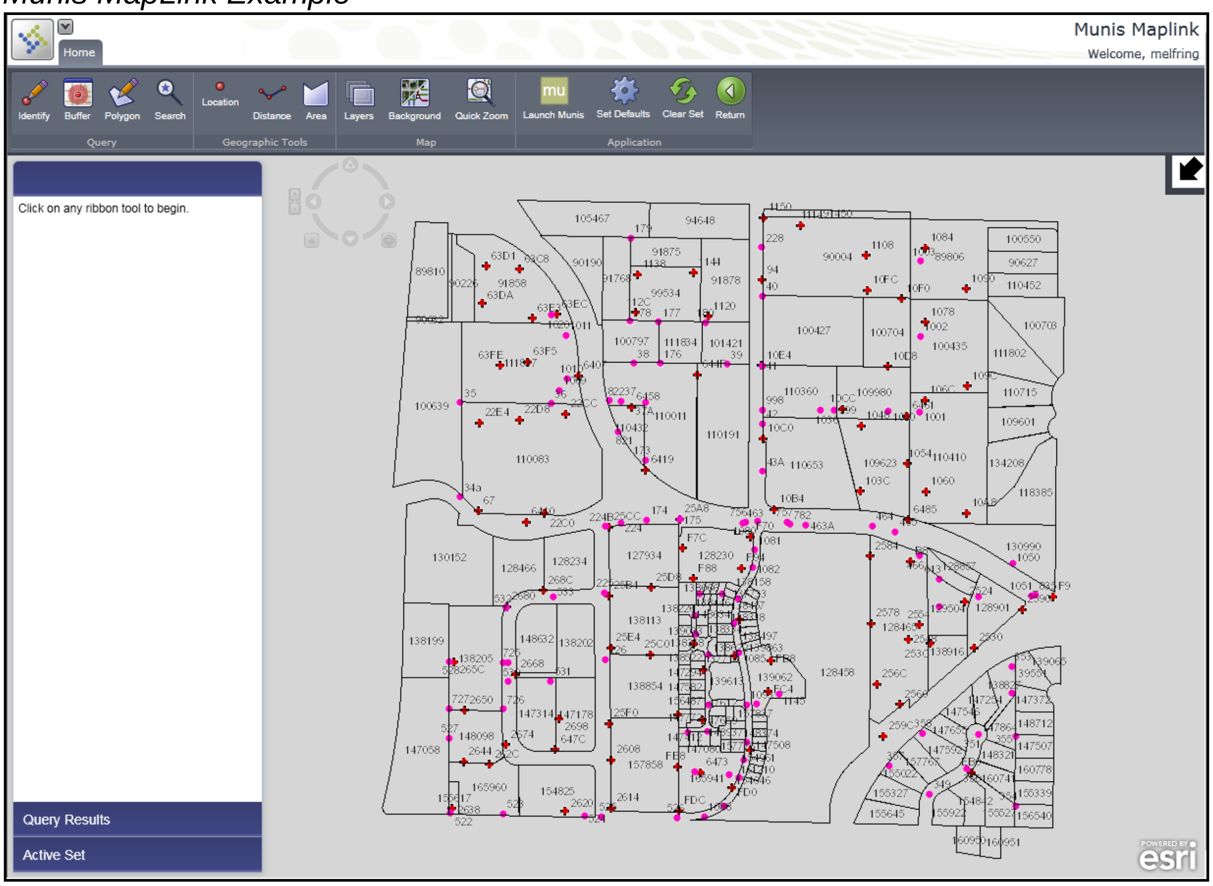
Utilities

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



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

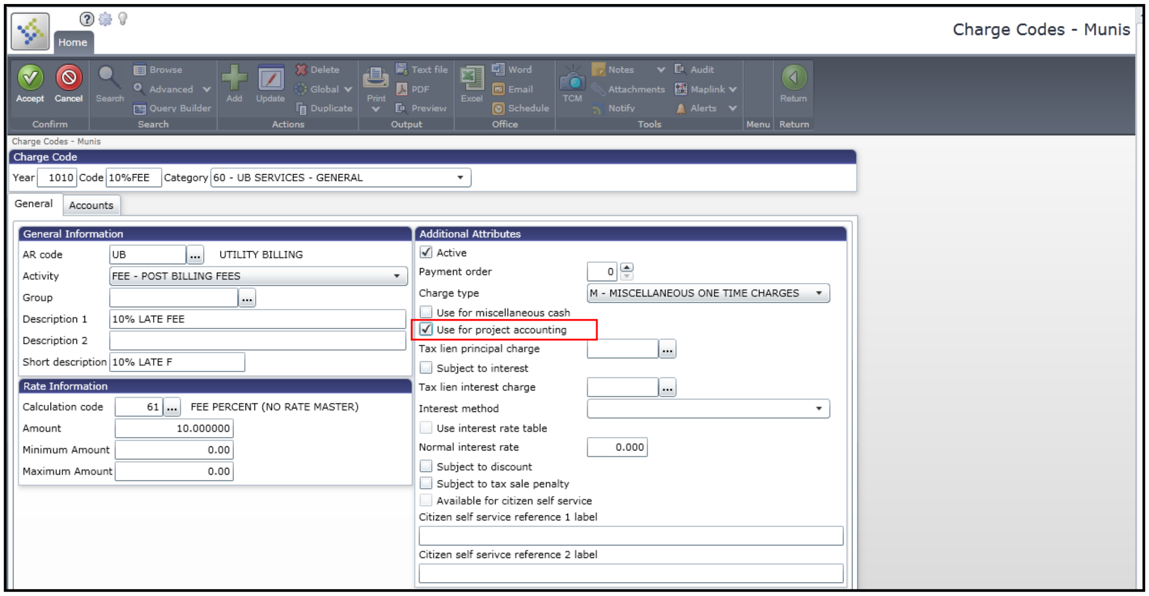
Munis MapLink Example



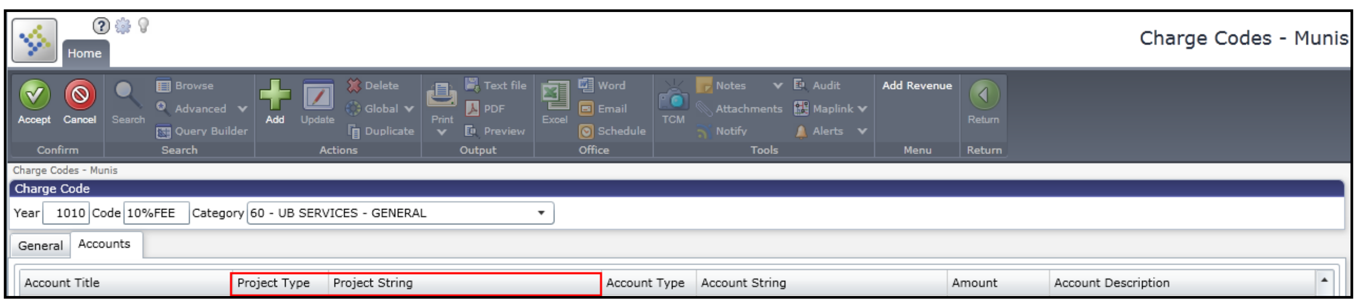
Utility Billing/Project Ledger Accounting

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

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



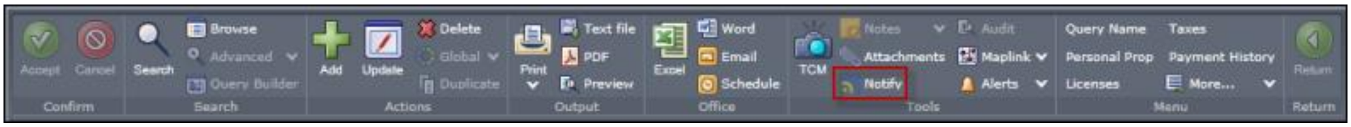
When this is selected, the Project Type and Project String boxes are available on the Accounts tab.



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

Tyler Notify

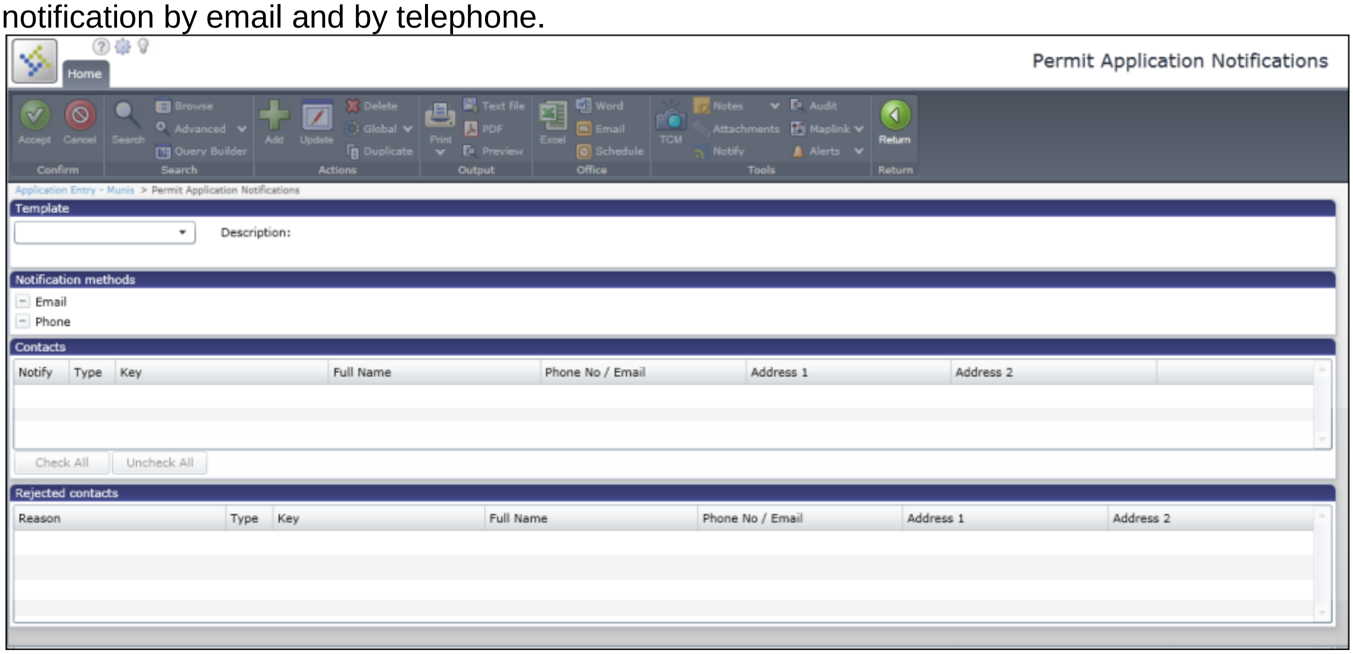
Munis is integrated with Tyler Notify to provide automated electronic notifications through telephone calls or emails. This feature requires that you purchase and install Tyler Notify. Once installed, the connection to Tyler Notify must be configured by entering the Tyler Notify base URL and Tyler Notify 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
  - Electronic Funds Transfer (EFT)
  - Assess Late Fees
- Business Licenses
  - Inactivate Expired Licenses
- Permits and Code Enforcement
  - Complaint/Violation Notices
- Utility Billing – CIS
  - Delinquent Notices

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



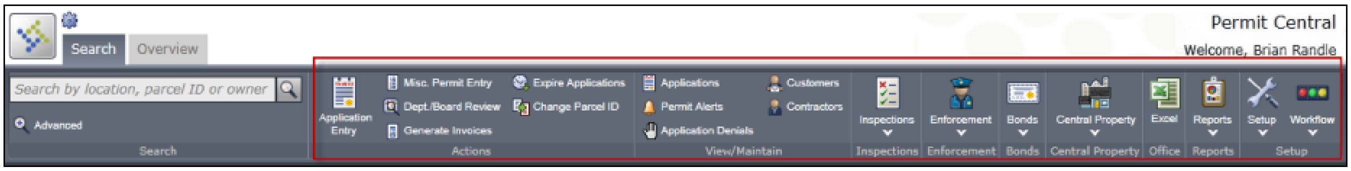
Munis Centrals Programs

The following changes apply to Munis Centrals programs.

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

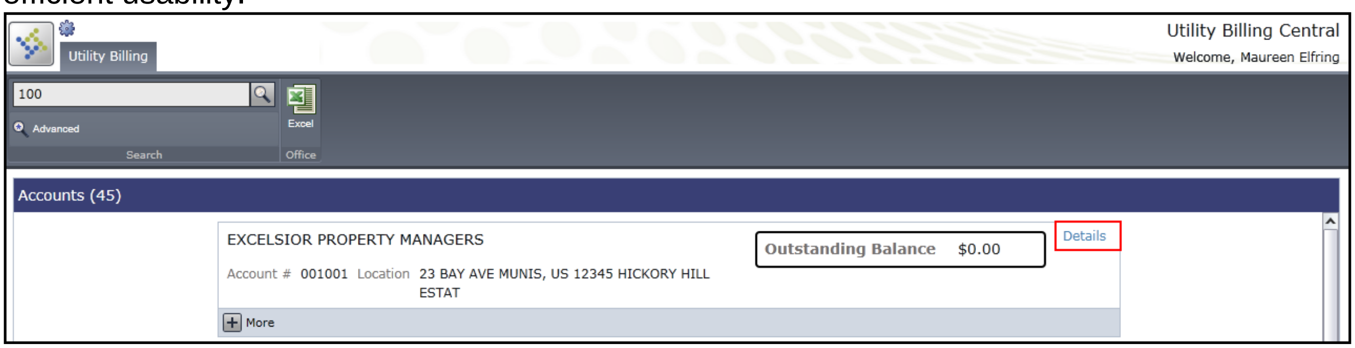
Permit Central

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

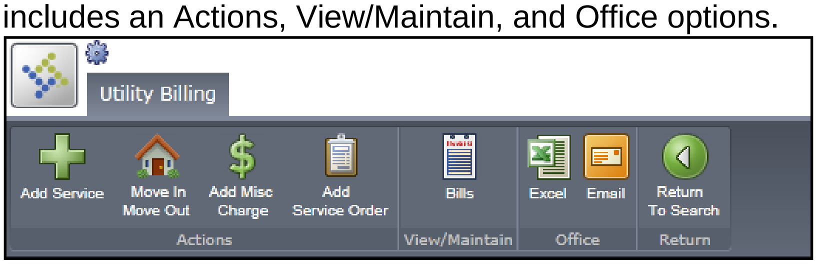


UB Central

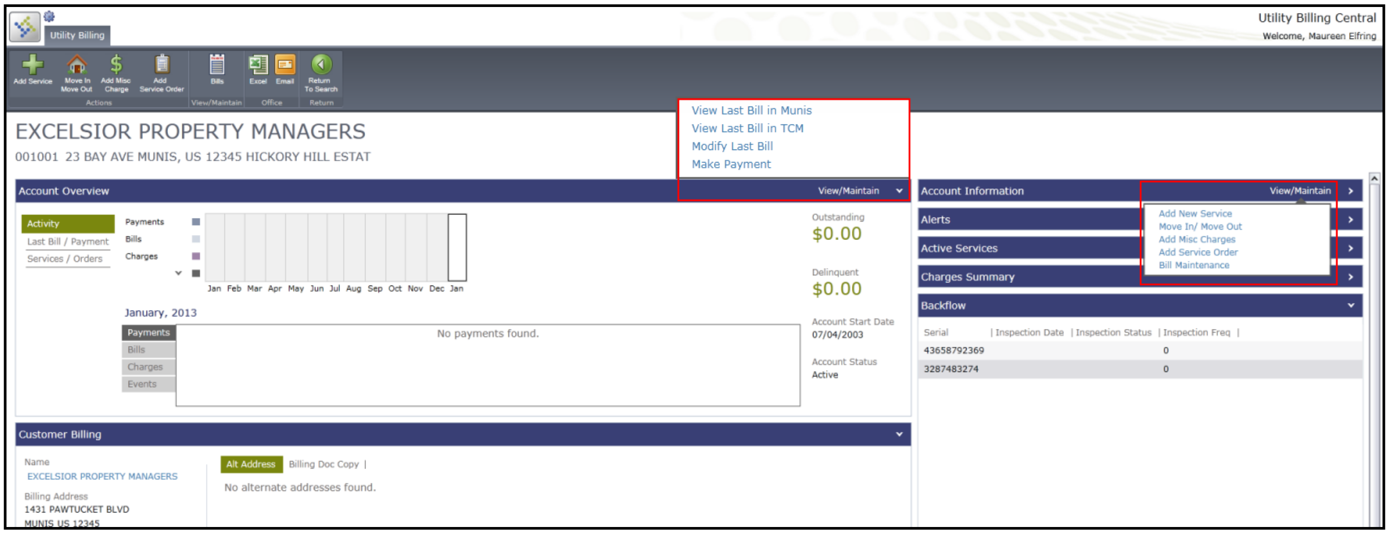
The UB Central program includes an updated look-and-feel that is designed to provide more efficient usability.



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



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


Utility Billing Central
Welcome, Maureen Elfring
Utility Billing
View Last Bill in Munis
View Last Bill in TCM
Modify Last Bill
Make Payment
EXCELSIOR PROPERTY MANAGERS
001001 23 BAY AVE MUNIS, US 12345 HICKORY HILL ESTAT
Account Overview
View/Maintain
Account Information
Add New Service
Move In/ Move Out
Add Misc Charges
Add Service Order
Bill Maintenance
Alerts
Active Services
Charges Summary
Backflow
Outstanding
$0.00
Delinquent
$0.00
Account Start Date
07/04/2003
Account Status
Active
January, 2013
No payments found.
Customer Billing
EXCELSIOR PROPERTY MANAGERS
1431 PAWTUCKET BLVD
No alternate addresses found.

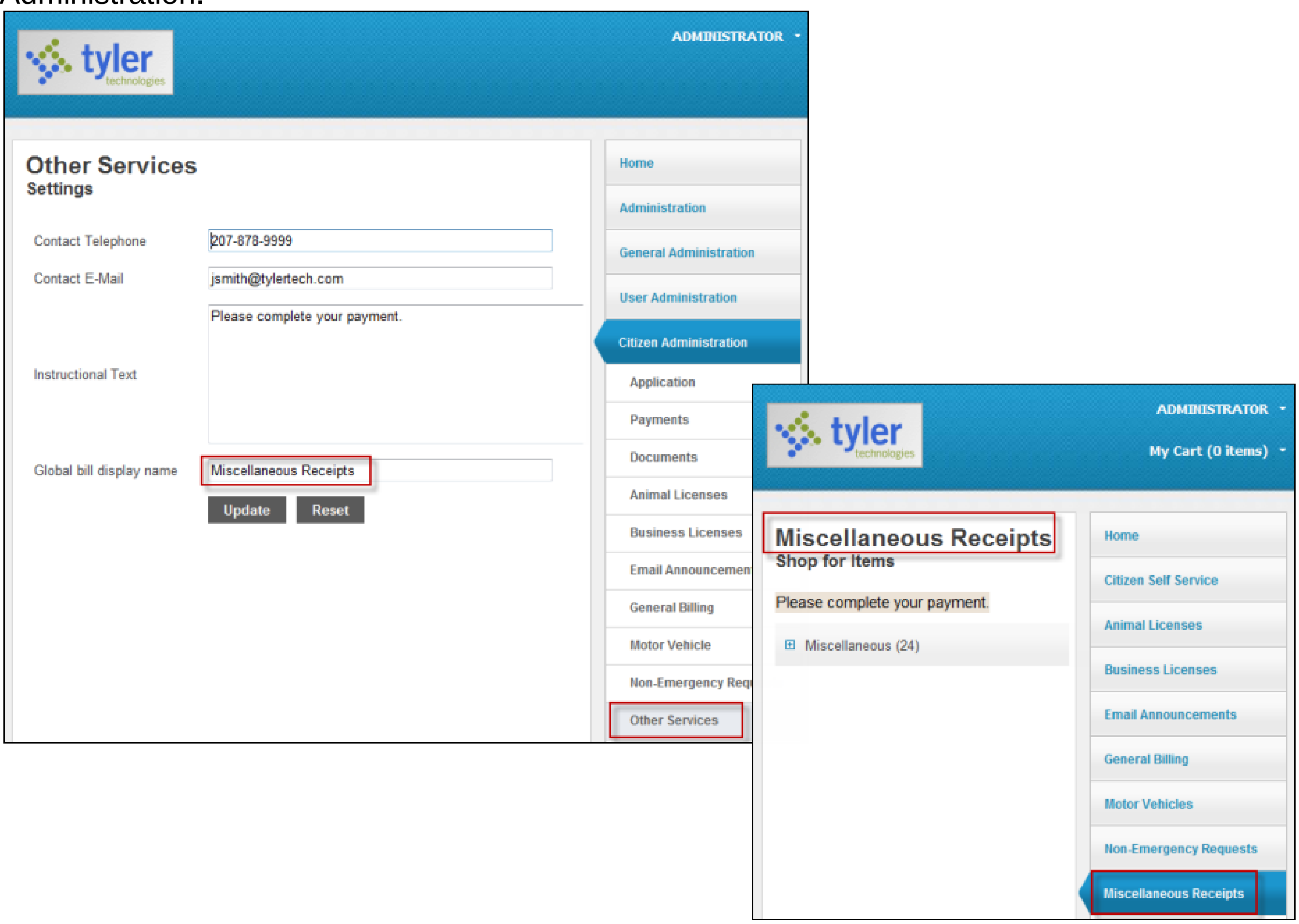
Munis Self Service

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

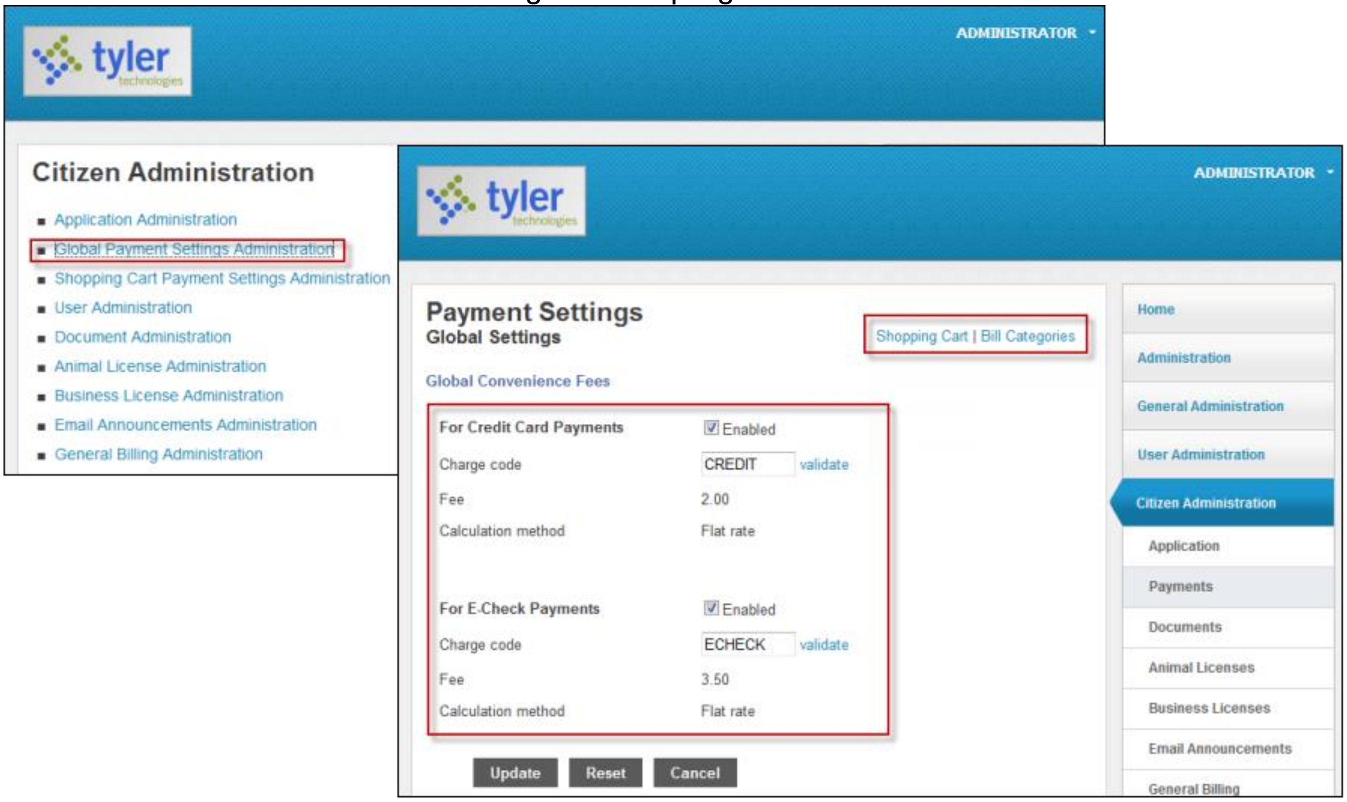
Citizen Administration allows updates to module names in Citizen Self Service, with the exception of Tax Relief and Email Announcements. The specific modules that allow the changes are: Animal Licenses, Business Licenses, General Billing, Non-Emergency Requests, Motor Vehicle, Other Services (Miscellaneous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

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



Payments Administration

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

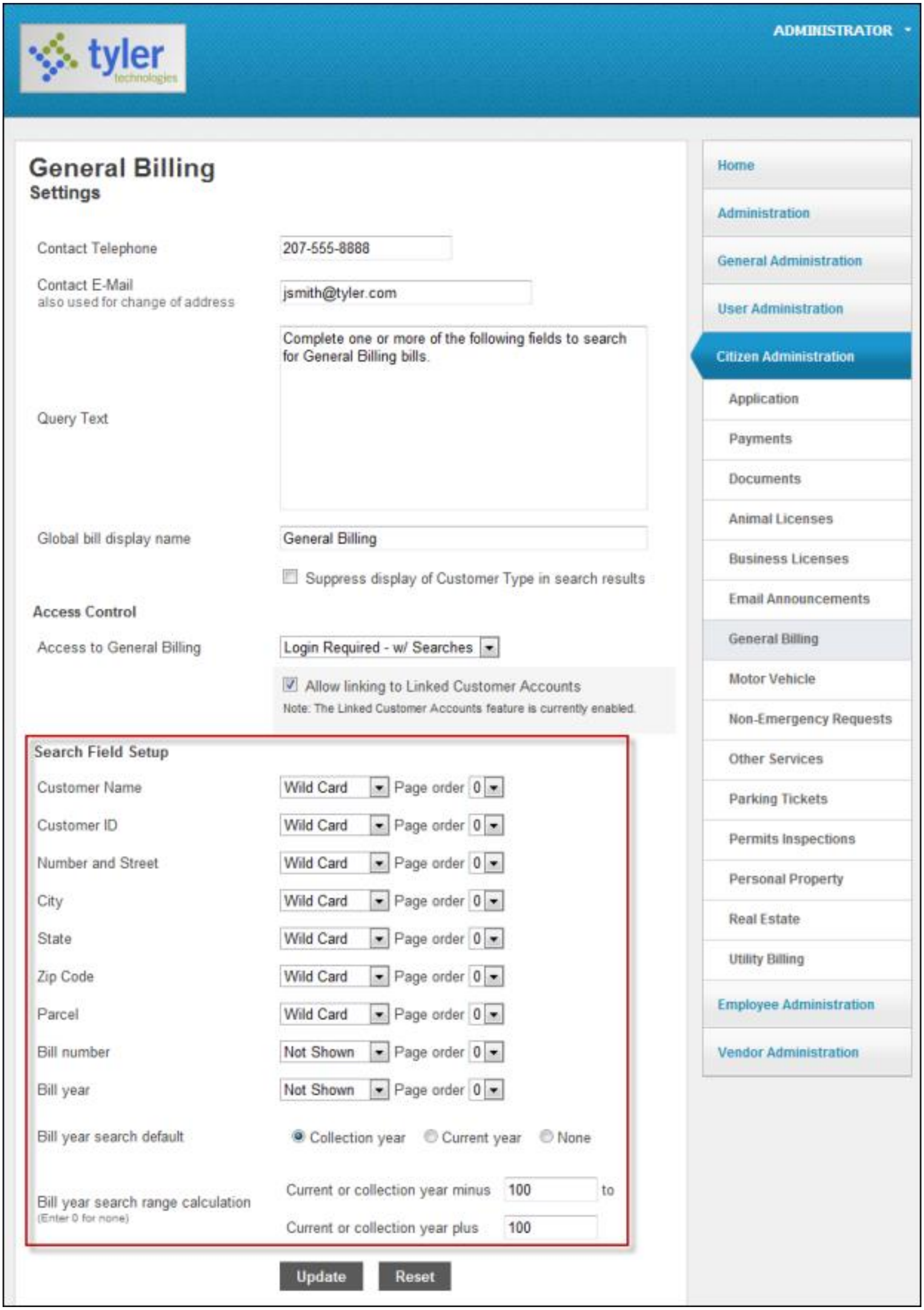


Bill Categories

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

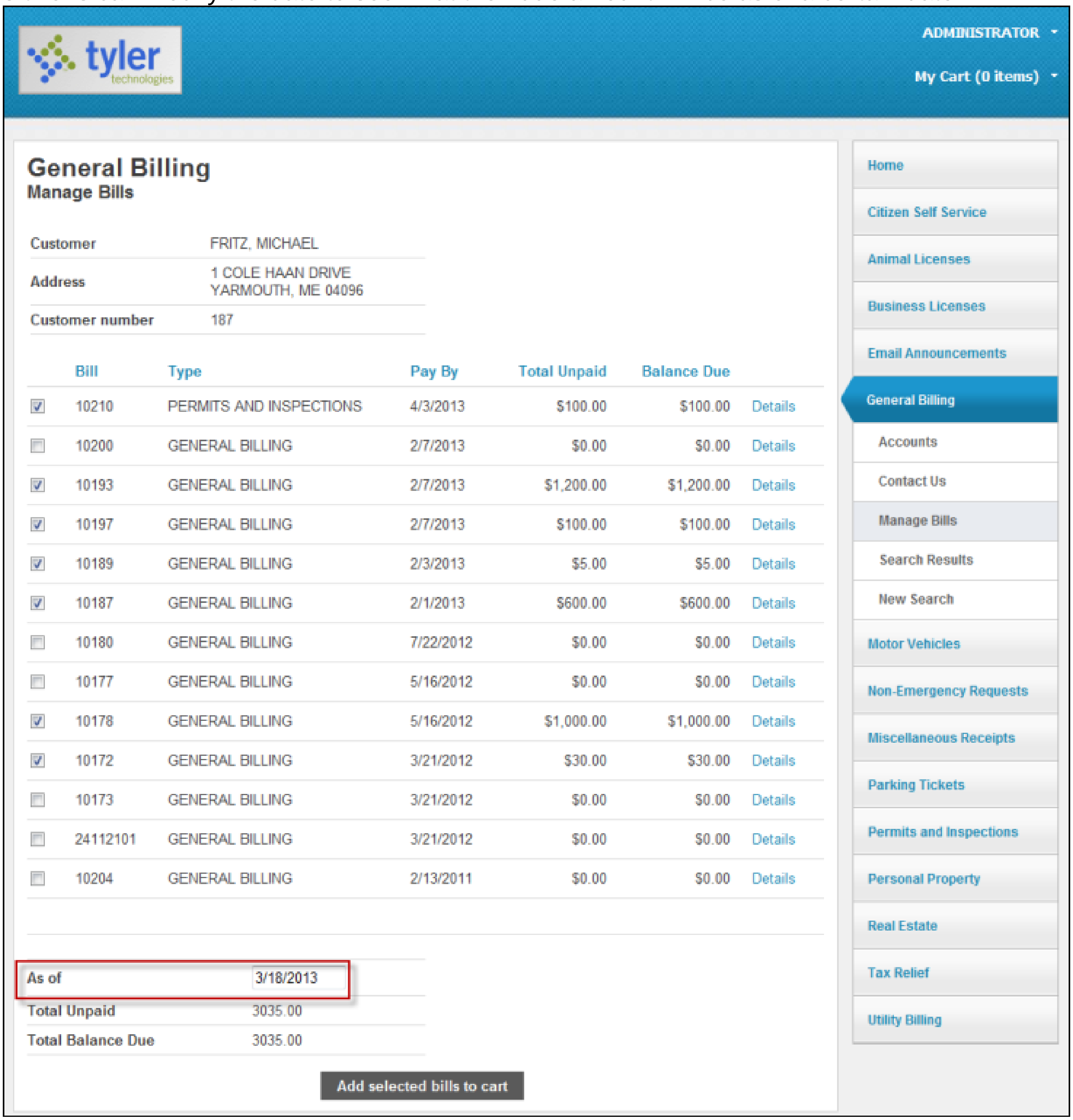
The Search Field Setup section of each module allows you to set the page order of the search pages.

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


ADMINISTRATOR
tyler technologies
General Billing
Settings
Contact Telephone
207-555-8888
Contact E-Mail
also used for change of address
jsmith@tyler.com
Query Text
Complete one or more of the following fields to search for General Billing bills.
Global bill display name
General Billing
Suppress display of Customer Type in search results
Access Control
Access to General Billing
Login Required - w/ Searches
Allow linking to Linked Customer Accounts
Note: The Linked Customer Accounts feature is currently enabled.
Search Field Setup
Customer Name
Customer ID
Number and Street
City
State
Zip Code
Parcel
Bill number
Bill year
Wild Card
Not Shown
Page order
0
Bill year search default
Collection year
Current year
None
Bill year search range calculation
(Enter 0 for none)
Current or collection year minus
100
to
Current or collection year plus
100
Update
Reset
Home
Administration
General Administration
User Administration
Citizen Administration
Application
Payments
Documents
Animal Licenses
Business Licenses
Email Announcements
General Billing
Motor Vehicle
Non-Emergency Requests
Other Services
Parking Tickets
Permits Inspections
Personal Property
Real Estate
Utility Billing
Employee Administration
Vendor Administration

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

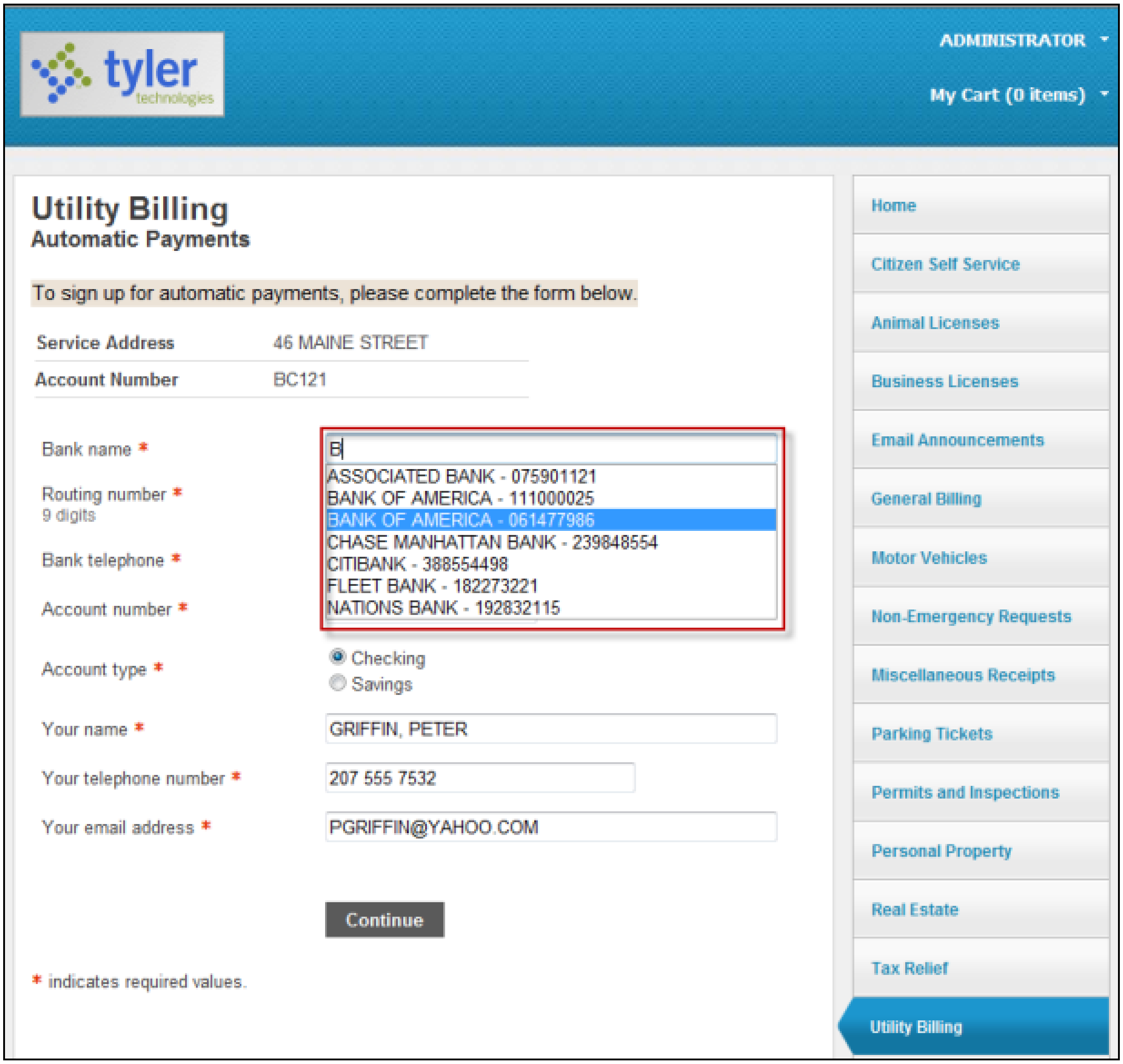
The As Of date box is available on the Manage Bills page for General Billing and the View Bills pages for Motor Vehicle Taxes, Personal Property Taxes, and Real Estate Property Taxes. Citizens can modify the date to see what their due amount will be as of a certain date.



Utility Billing

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

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



Available Web Parts

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

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