



## Munis Revenues

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*Major Enhancements  
Version 10.3  
March 21, 2013*

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# 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.

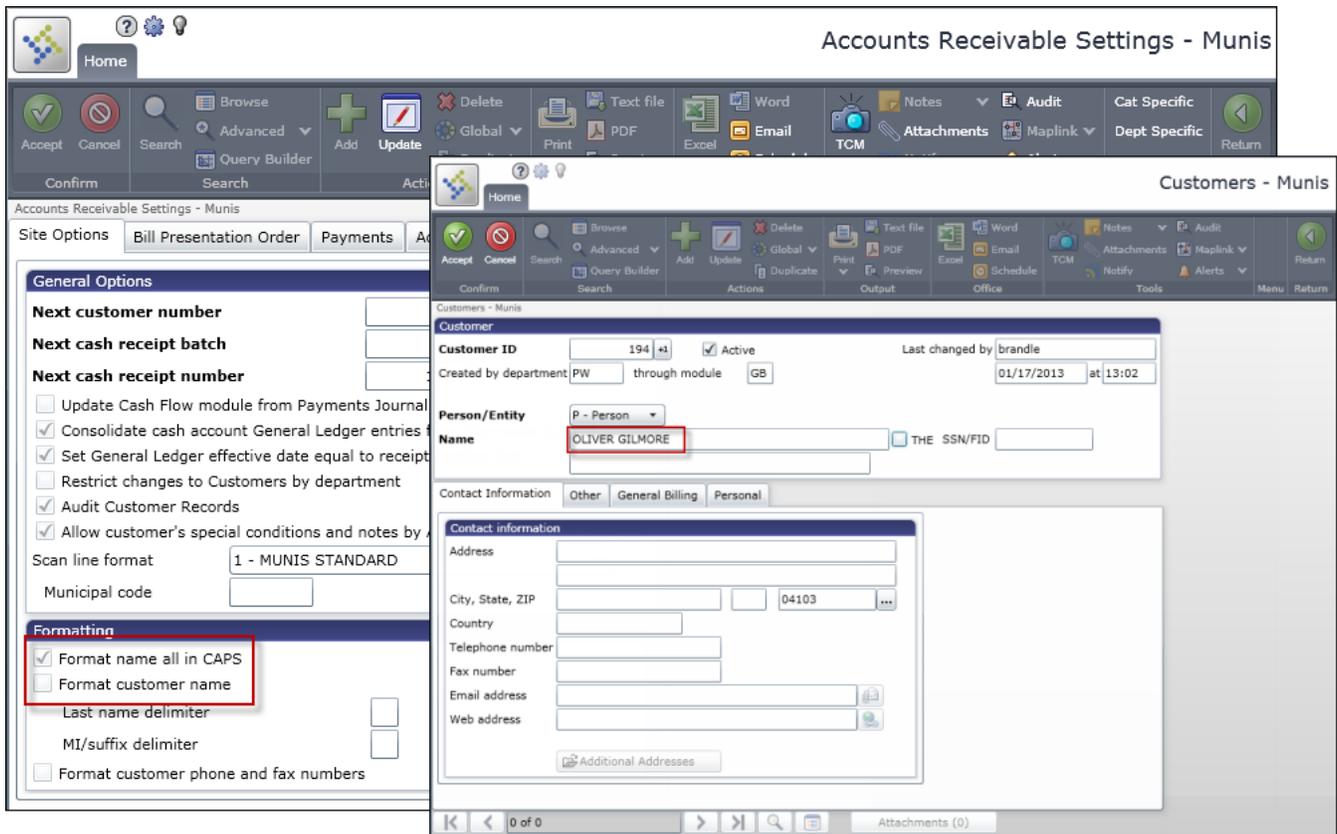
## Accounts Receivable Settings, Customers

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 screenshot shows the 'Accounts Receivable Settings - Munis' application window. The 'Site Options' tab is active, and the 'Formatting' section is highlighted with a red box. The 'Format name all in CAPS' and 'Format customer name' checkboxes are checked. The 'Format customer name' checkbox is located below the 'Format name all in CAPS' checkbox. The 'Format customer name' checkbox is located below the 'Format name all in CAPS' checkbox. The 'Format customer name' checkbox is located below the 'Format name all in CAPS' checkbox.

Section	Field/Option	Value/Status
General Options	Next customer number	192
	Next cash receipt batch	349
	Next cash receipt number	1960
	<input type="checkbox"/> Update Cash Flow module from Payments Journal	
	<input checked="" type="checkbox"/> Consolidate cash account General Ledger entries from Payments Journal	
	<input checked="" type="checkbox"/> Set General Ledger effective date equal to receipt posting date	
	<input type="checkbox"/> Restrict changes to Customers by department	
	<input checked="" type="checkbox"/> Audit Customer Records	
	<input checked="" type="checkbox"/> Allow customer's special conditions and notes by Accounts Receivable category	
	Scan line format	1 - MUNIS STANDARD
Municipal code		
Formatting	<input checked="" type="checkbox"/> Format name all in CAPS	
	<input checked="" type="checkbox"/> Format customer name	
	Last name delimiter	.
	MI/suffix delimiter	.
<input type="checkbox"/> Format customer phone and fax numbers		

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



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

Accounts Receivable Settings - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Confirm Search Add Update Duplicate Actions Delete Global Print PDF Preview Output Text file Word Excel Office TCM Notes Attachments Notify Tools Audit Maplink Alerts Cat Specific Dept Specific Menu Return

Accounts Receivable Settings - Munis

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

**Prepayments**

Automatically calculate interest expense after  days at an interest rate of

**Refunds**

Automatically calculate interest expense after  days

Override interest expense rate

**Special Conditions**

Special condition default duration period of  months

**Web Payments**

Send e-mail confirmation for web payments

**IVR**

Payments clerk

Flag with payment warning (cash only) special condition

Days past due to exceed threshold

New batch times for day's payments:

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

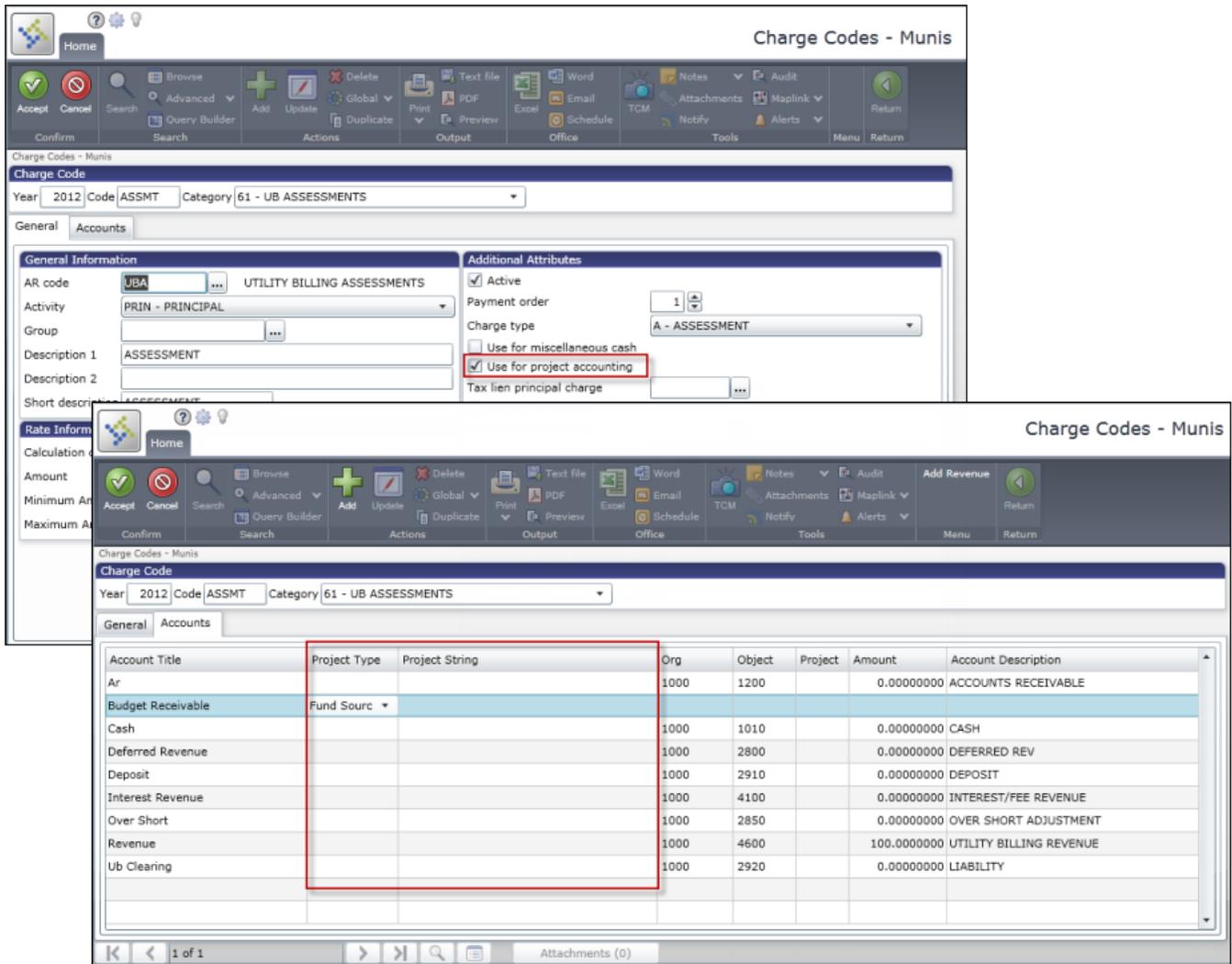
Time 2

Time 3

Time 4

## Charge Codes

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



## Process Lockbox File

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

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

Process Lockbox Files - Munis

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Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Email TCM Notes Attachments Audit Define Process Import NACHA Settings Return

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

Process Lockbox Files - Munis

**Scheduling**

Execute this report [Dropdown]

**Lockbox parameters**

Entry date [Dropdown] [Date] 3.5

Clerk [Text]

Department [Dropdown]

Batch number [Text]

Deposit [Text]

Interest eff date [Dropdown] [Date] 3.5

GL effective date [Dropdown] [Date] 3.5

Year/period [Text] [Text] [Text]

Override cash account

Accept only exact payments on tax bills

File format [Dropdown]

Personal property payment match by parcel ID

Pay current collection year only on tax bills

Lockbox co. name [Text]

Import path [Text]

Payment method override [Dropdown]

**Refund Options**

Refund overpayments

Refund reason code [Text] ...

Refund overpayments to [Dropdown]

**Lockbox filters**

AR code [Text] ...

**Processing summary**

Payments processed [Text]

Error count [Text]

## Transfer of Overpayments

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

Transfer of Overpayments - Munis

Home

Accept Cancel Search Advanced Add Update Delete Global Print PDF Excel Word Notes Attachments Maplink Output-Rel History Mass Select Access Recs Return

Transfer from Customer account information

AR Category

Year/Bill

Property CD

Parcel

Reason

Effective Date

Amount

Hold

Transfer of Overpayments - Munis > Add Transfer Record

Transfer from

AR Cat 20

Year 2011

Bill 3

Transfer to

Cat/Year/Bill 20 2011 4

Parcel

Property code

Customer number

AR Cat 1 to 63

Bill 0 to 999999

Only bills of the same category

Only bills of the same bill type

Only bills of the same AR code

Transfer details

Reason TRS - TRANS CODE

Effective Date Last payment date 01/11/20

Amount 44.52

Transfer of Overpayments - Munis

Home

Accept Cancel Search Advanced Add Update Delete Global Print PDF Excel Word Notes Attachments Maplink Output-Rel History Mass Select Access Recs Return

Transfer from Customer account information

AR Category 20

Year/Bill 2011 3

Property CD 123456

Parcel 123456

Reason TRS - TRANS CODE

Effective Date 01/11/2013

Amount 44.52

Hold

Customer account information

1

SMITH, BILL

100 MIDDLE ST

MUNIS, US 12345

207-782-2260

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

1 of 1

1 transfer record(s) exist for: bundle

# 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.

The screenshot displays the 'Account Detail' screen in the Munis system. The 'License' section is active, showing details for License reference 6700140, Account ID 20070085, and DBA FRITZ, MICHAEL. The 'Notes' tab is selected, showing a table with one note: 'Please read this note.' The 'Add' button is highlighted with a red box. Below the notes, there is a table for 'Charge' with columns for Reference, Start Date, Stop Date, Quantity, Factor, Prorate, and Bill Amount. The table contains one row for 'CONTRACTOR LICENSE' with a bill amount of 35.00.

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

## Business Accounts, Business License Settings

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

## Business Accounts

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

The screenshot displays the 'Business Accounts - Munis' application window. The 'Business' section is active, showing details for Account ID 20070085. The 'Other' tab is selected, and a red box highlights the 'Override license/tax delivery methods' section. This section includes a main checkbox and three sub-sections: 'Form delivery method', 'Fax', and 'Print'. Each sub-section contains checkboxes for 'Renewals', 'Licenses', and 'Bills'. The 'Form delivery method' section is currently unchecked, while the 'Fax' and 'Print' sections are also unchecked. The 'Print' section only shows a 'Renewals' checkbox.

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

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

**Account Taxes**

Home

Accept Cancel Search Browse Advanced Query Builder Confirm Search Add Update Duplicate Global Print PDF Excel Word Email Schedule Office Notes Attachments TCM Notify Alerts Audit Maplink Receipts Generate AR History Print Returns Return

Business Accounts > Munis > Account Taxes

**Tax**

Reference 6700147 Account ID 20070085 DBA FRITZ, MICHAEL

Main User Defined

Category TAXC TAX CODE Mail to AGENT/OPERATOR  
 Cycle code A ANNUAL Bill to AGENT/OPERATOR  
 Status ACTIVE UNFILED  
 Allow processing of exempt tax  
 Inactivated .15  
 Last bill date 04/16/2012 .15  
 Tax group

Discount allowed  
 Print forms  
 Print forms/delinquent notices  
 Additional forms requested

**Form delivery method**  
 Email  
 Renewals  
 Bills  
 Fax  
 Renewals  
 Bills  
 Print  
 Renewals  
 Bills

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

Add Update Delete

2 of 2 Attachments (0)

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

Account Detail

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Global Print PDF Excel Word Email Schedule TCM Attachments Notify Alerts Receipts Generate AR History Print Renewal Bill History More... Return

Business Accounts - Munis > Account Detail

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

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

**Dates**

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

**Form delivery method**

Email  
 Renewals  
 Licenses  
 Bills

Fax  
 Renewals  
 Licenses  
 Bills

Print  
 Renewals  
 Licenses  
 Bills

Bonds/Insurance License CIDs Locations Requirements

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

Add Update Delete

1 of 1 Attachments (0)

**Business License Settings:**

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

Business License Settings - Munis

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Business License Settings - Munis

Bill year 2012

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

**Settings**

Next ID no	20070091	AR code	BL - BUS. LIC
Next detail ref no	6700150	Discount percent	.000
Next license issue no	400014	Current cycle	1
Next bill no	100256	Process receipts	Warn-only
Next adj ref no	200012	Unpaid balance check	All BL Bills
Next C of O	1001	Unpaid threshold	0.00
Validate parcel ID	Central property	License output type	XML Export
Validate personal property	No validation	Bill output type	XML Export
Interest method	01 - DAILY INTEREST	Filing history limit	0
Max Aggr Int Rt	.00		

**Additional settings**

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

## 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

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Accept Cancel Search Browse Advanced Query Builder Confirm Search Add Update Duplicate Actions Delete Global Print PDF Preview Output Text file Word Excel Email Schedule Office TCM Notes Attachments Notify Alerts Tools Installments Requirements 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

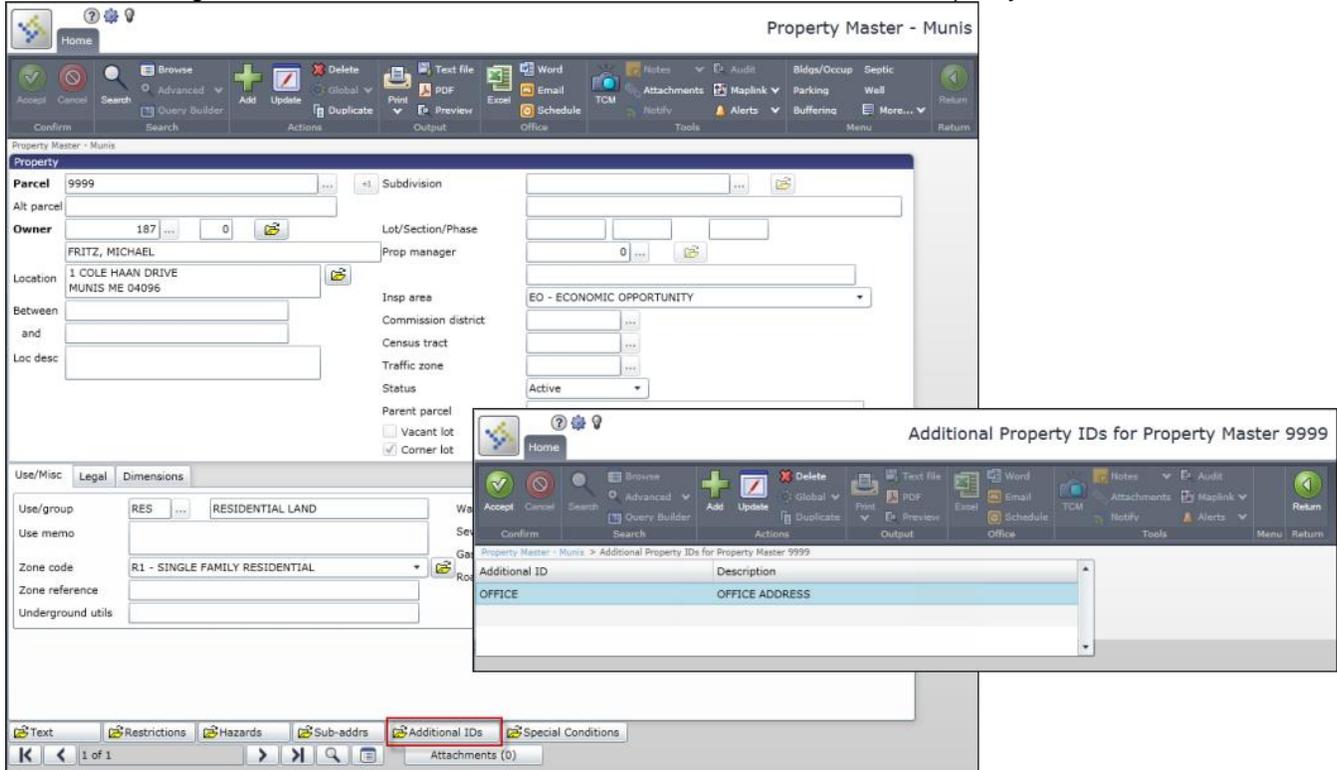
Adjustment reason

# 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.

Property Master - Munis

Home

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

Property Master - Munis > Other Modules

Property

Parcel 9999 Subdivision

Alt parcel

Owner 187 0 Lot/Section/Phase

FRITZ, MICHAEL Prop manager

Location 1 COLE HAAN DRIVE MUNIS ME 04096

Between and Loc desc

Insp area Commission district Census tract Traffic zone Status Parent parcel

Vacant lot  Res  Go

Corner lot

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

Other Modules 23

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

Text Restrictions Hazards Sub-addr 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.

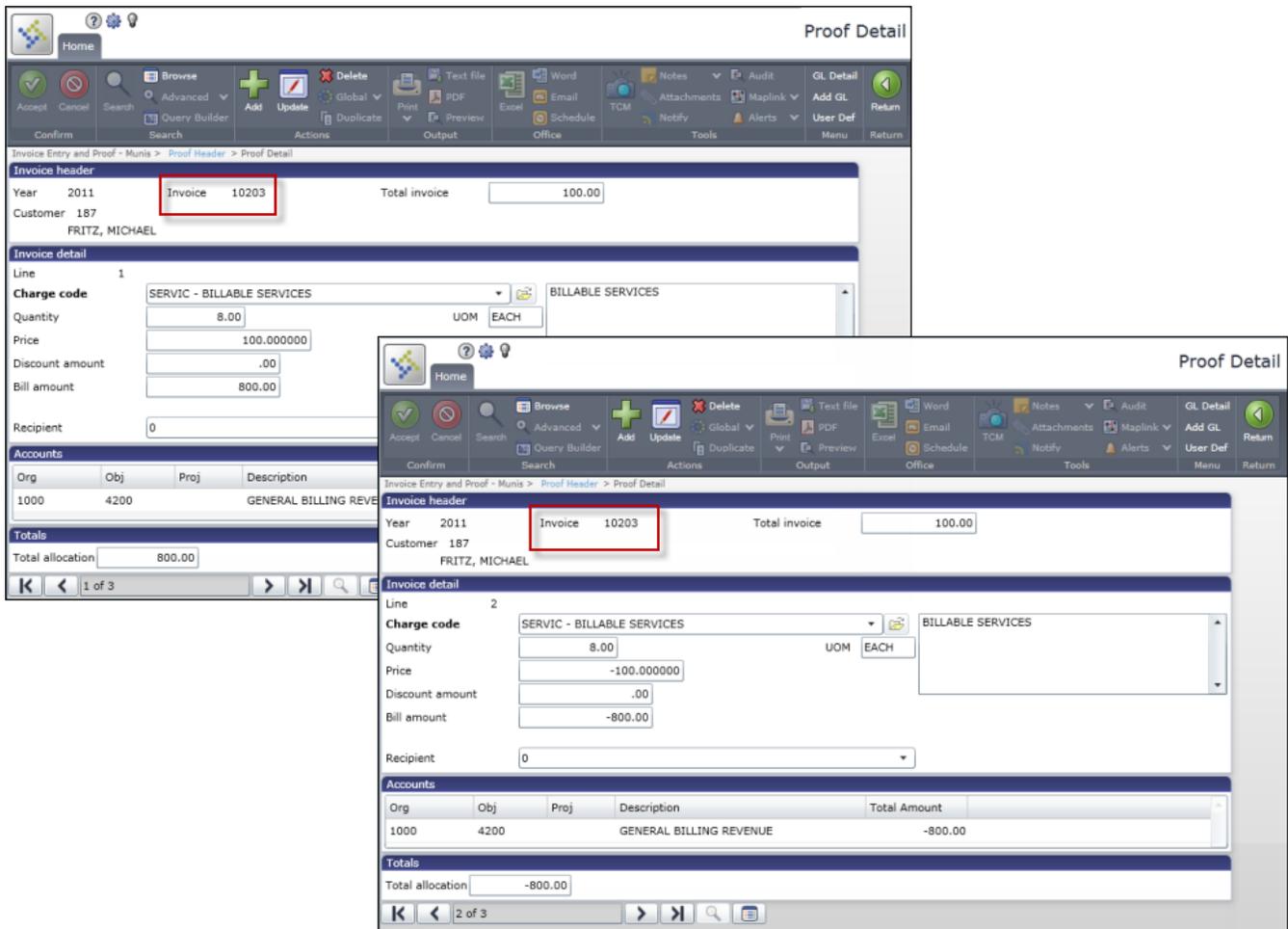
The screenshot displays the 'Invoice Entry' application interface. At the top, there is a search bar and a ribbon with various action buttons like 'Add Batch', 'Delete Batch', 'Resume', 'Post', 'Customers', 'Excel', and 'Batch'. Below the ribbon is a table titled 'Batches (3)' with columns for Batch, User, Effective Date, Year, Period, Invoice Count, Batch Total, and Actions. The table lists three batches for user 'brandle'.

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

Below the table is a 'Filter' section with a 'Batch selection' dropdown set to 'All Batches' and an 'Effective date' field. The main view shows 'Batch 176' details, including 'Default invoice date' (2/20/2012), 'Effective date' (2/20/2012), and 'Year / Period' (2010 / 1). It indicates 'Invoices 1 Total \$200.00'. The 'Invoices' section shows 'Invoice 10174' with a 'Total \$200.00'. The customer information is 'RONALD W, SMITH' with address '100 MIDDLE STREET, FALMOUTH, ME 04105'. The 'Invoice date' is 2/20/2012 and the 'Due date' is 3/21/2012. The 'AR Code' is 'GENERAL BILLING (GB)'. At the bottom, the 'Invoice Lines (1)' table shows one line for 'RENTAL OF FACILITIES (RENTF)' with a price of 100.00, quantity of 2, and a total of 200.00.

## 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.

Proof Header

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Attachments Notes Audit Detail TCM Notify Alerts Tools User Def Return

Confirm Search Query Builder Search Actions Output Office Schedule Menu Return

Invoice Entry and Proof - Munis > Proof Header

**Invoice header**

GL effective date: [ ] [15] Total: [ ] 100.00

Year/period: 2011 7 JAN

Customer: 187 ... Addr no. 0 ...

FRITZ, MICHAEL

1 COLE HAAN DRIVE

YARMOUTH, ME 04096

Insurance code: [ ]

Insurance policy: [ ]

Customer PO: [ ]

Parcel: [ ] ...

Contract: [ ] ...

For/Location: [ ]

AR code: GB - GENERAL BILLING

Invoice: 10203 +1  Project Accounting invoice

Invoice date: 01/11/2013 [15] Due date: 02/10/2013 [15]

Discount code: [ ]

Discount percent: .00

Department: [ ]

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

Comments

**Workflow**

Approval Status: R Rejected

Approval Comment: Rejected

Approve Reject Forward Hold Approvers Resubmit

1 of 1 Attachments (0)

## 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

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Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Delete Global Print PDF Excel Word Notes Attachments Notify Alerts TCM Maplink Audit

Confirm Search Actions Output Office Tools Menu Return

Recurring Invoices - Munis

Recurring Invoice Invoice Detail Invoice History

**Invoice header**

Customer 187 ... FRITZ, MICHAEL

Address 0

Total invoice

AR code GB - GENERAL BILLING

Invoice prefix 241125  Project Accounting invoice

Contract ...

Contract amount 0.00 For/Loc

Billed amount 0.00

Customer PO

Discount code

Discount percent .00

Department

Cash account 1000 ... 1010 ...

Parcel 9999 ... [Comments](#)

**Recurrence pattern**

Search by recurrence

Weekly

Monthly

Yearly

Custom

**Weekly**

Recur every week

**Recurrence details**

Start date [15] End date [15] Last date invoiced [15]

0 of 0 Attachments (0)

# Permits and Code Enforcement

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

## Application Entry

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

The screenshot shows the 'Application Permits' screen in the Munis system. The 'Permit' section is active, displaying details for Application 17, 111 MAIN, with Record ID 39. The 'Type' is ELEC (ELECTRIC) and the 'Status' is WITHDRAWN. The 'Hold/Withdraw' date is set to 01/18/2013, which is highlighted with a red box. Below this, the 'Fees' section shows a table of fees for the ELECTRIC item, with a total balance due of .00. The 'Workflow' section at the bottom includes buttons for 'Start Workflow', 'Approve', 'Reject', 'Forward', 'Hold', 'Approvers', and 'Workflow N/A'.

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

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

Application Permits

Application Entry - Munis > Application Permits

Permit

Application 17 111 MAIN 12 Record ID 37

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

Status K REVOKED Active

Permit B 20030472 +-1

Issued 02/16/2007 15 by MU

Expires 02/16/2008 15

Deny/Void/Revoke 01/18/2013 15

Hold/Withdraw 15

Fees Additional Bond

Bldg seq ... Issue invoice N To

Estim cost 0

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

Total Fees 15.00

Total Credits .00

Total Paid .00

Balance Due 15.00

Workflow

Start Workflow Approve Reject Forward Hold Approvers Workflow N/A

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

Close/Deny Application

Application Entry - Munis > Close/Deny Application

Status

Status HOLD

Actual end 01/18/2013 15

Status code N - NEW Active

Status memo

Denial reason

Reason code ...

Reason for denial

Munis (piappent)

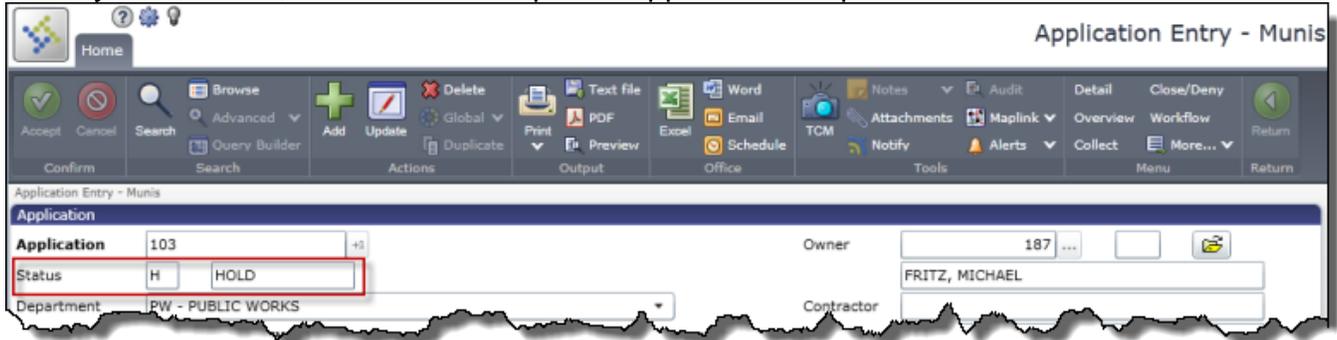
Unperformed required inspections will be deleted. Continue?

Yes No

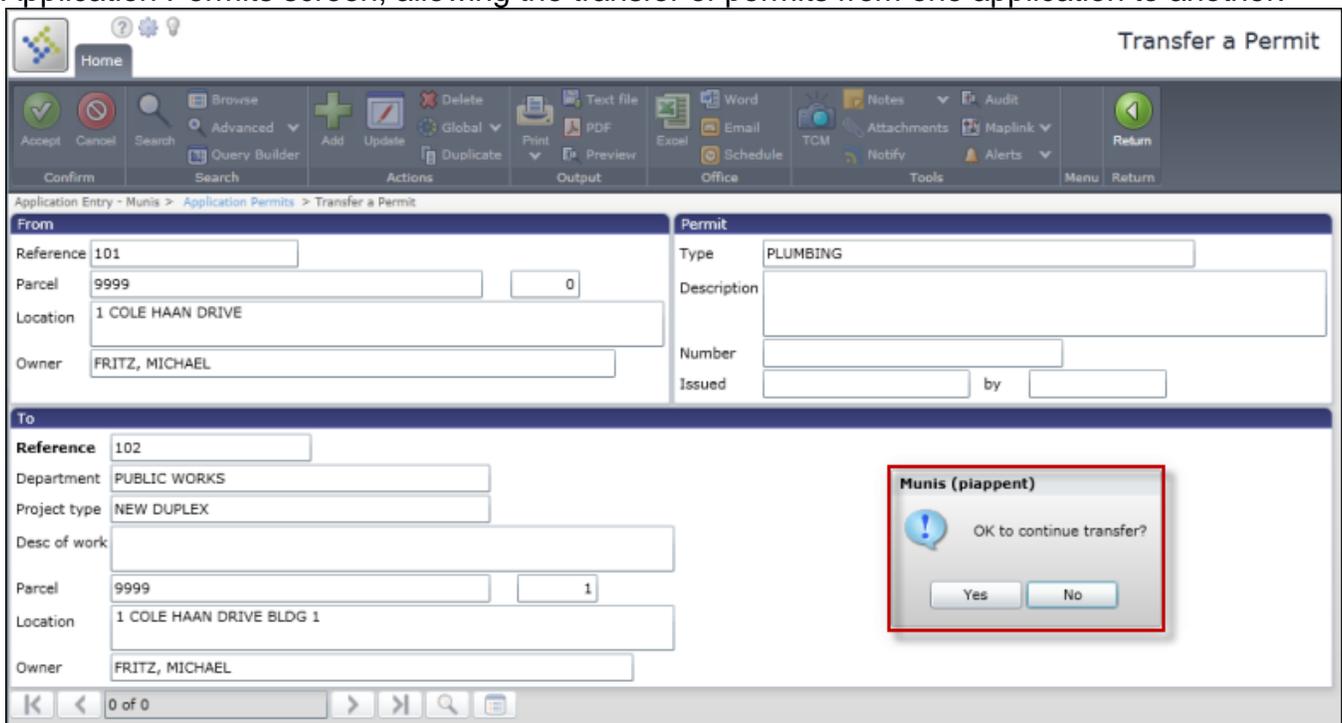
When you click Yes, the program displays a message asking to change the status of the application.



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

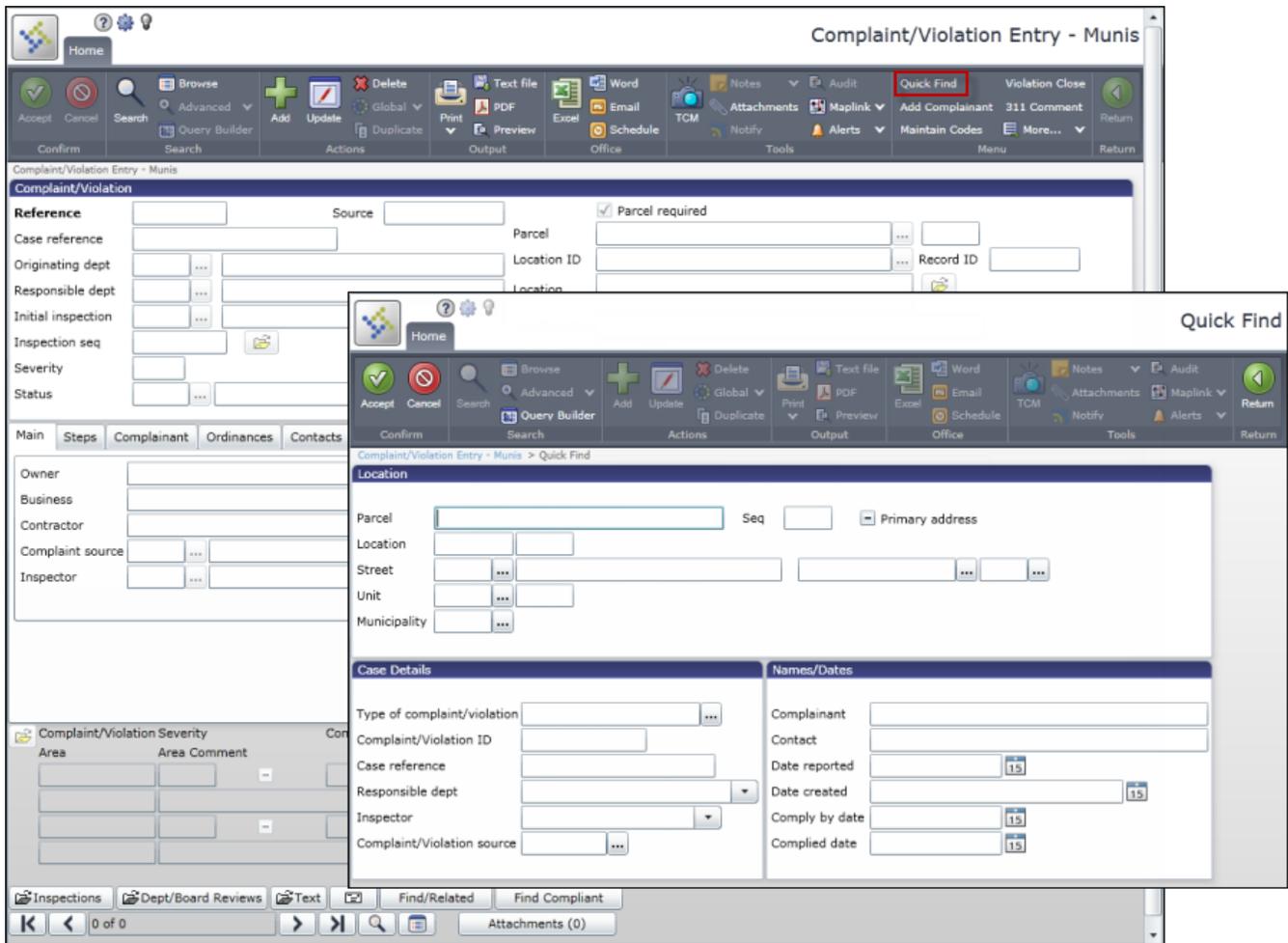


The Transfer a Permit screen is available when you click Transfer Permit through the Application Permits screen, allowing the transfer of permits from one application to another.



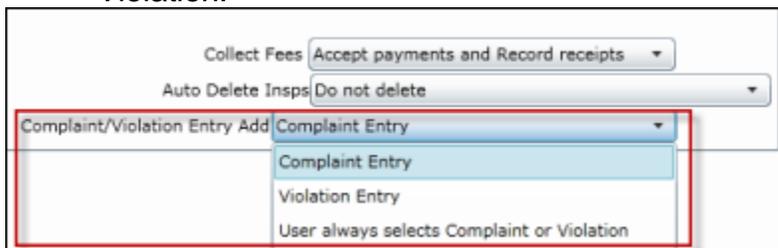
## Complaint/Violation Entry

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



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

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



## Permit and Code Enforcement Settings

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

The screenshot shows the 'Permits and Code Enforcement Settings - Munis' application. The 'Inspections / Violations' tab is active, and the 'Use system date for scheduling requests' checkbox is checked and highlighted with a red box. The interface includes a toolbar with various actions like 'Accept', 'Cancel', 'Search', 'Add', 'Update', 'Delete', 'Print', 'Text file', 'Word', 'Email', 'Schedule', 'TCM', 'Attachments', 'Maplink', 'Notify', 'Alerts', 'Field Audits', 'Clear App Lock', 'Create Codes', 'Clear Insp Lock', and 'Return'. The 'Inspections/Violations' section contains the following fields and options:

- Next Certificate of Inspection: 1
- Severity/Priority label: Severity
- Initial Complaint Source: [ ] ... [ ]
- Complainant names linked to CIDs
- Use system date for scheduling requests

The 'Inspection Shifts' section contains a table with the following data:

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

The 'Inspection Scheduling' section contains a dropdown menu set to 'MUNIS' and an 'Import' button. Below the dropdown, it displays 'Last Scheduling Import: 01/31/2012 15:06 Success'.

# Tax

The following changes apply to Munis Tax programs.

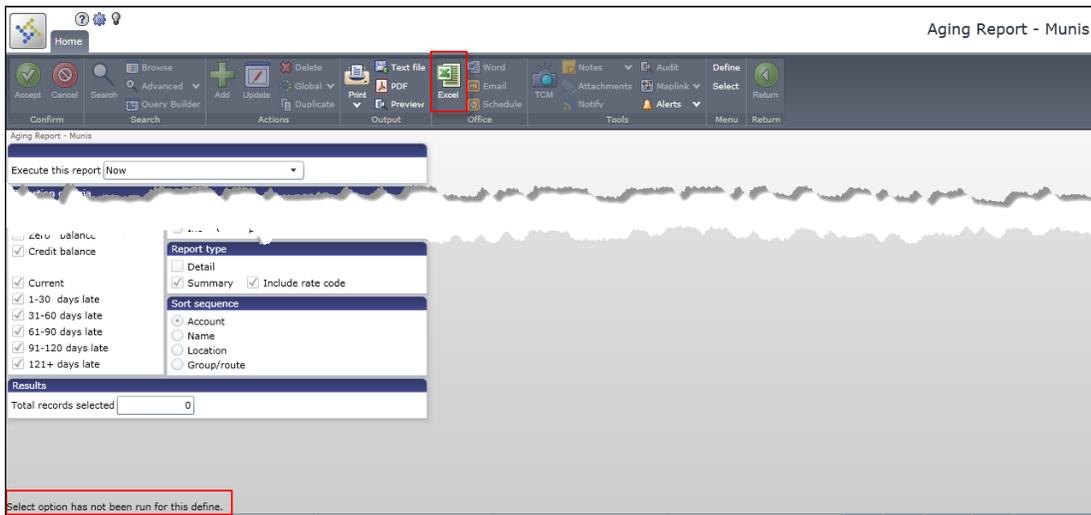
## Tax Settings

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.

The screenshot shows the 'Tax Settings - Munis' application window. The 'Parcel Display' tab is active, showing two tables side-by-side. The 'Parcel delimiter' table has columns for Segments, Size, and Delimiter. The 'Alt parcel delimiter' table also has columns for Segments, Size, and Delimiter. Red boxes highlight the changes in the 5th and 6th rows of both tables.

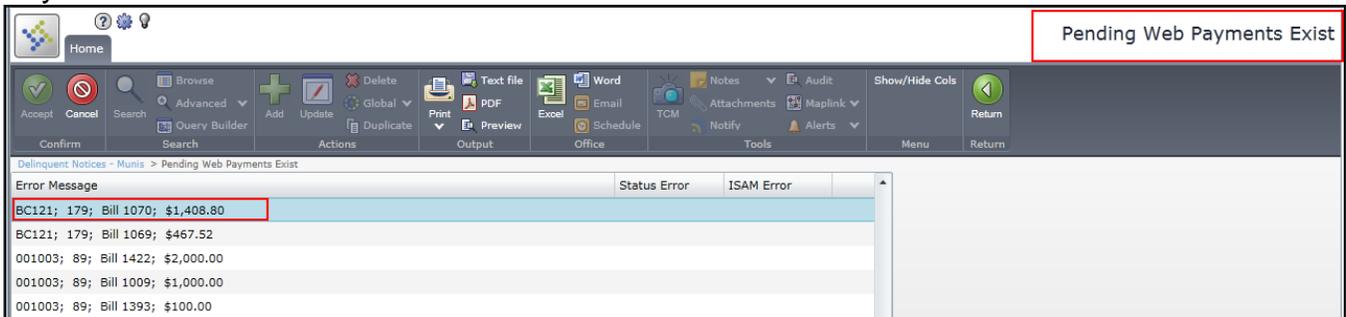
Parcel delimiter			Alt parcel delimiter		
Segments	Size	Delimiter	Segments	Size	Delimiter
1	3	.	1	5	.
2	3	.	2	5	.
3	3	.	3	4	.
4	3	.	4	4	.
5	4	(	5	5	%
6	4	)	6	6	&
7	5	%	7		
8			8		
9			9		
10			10		





## 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

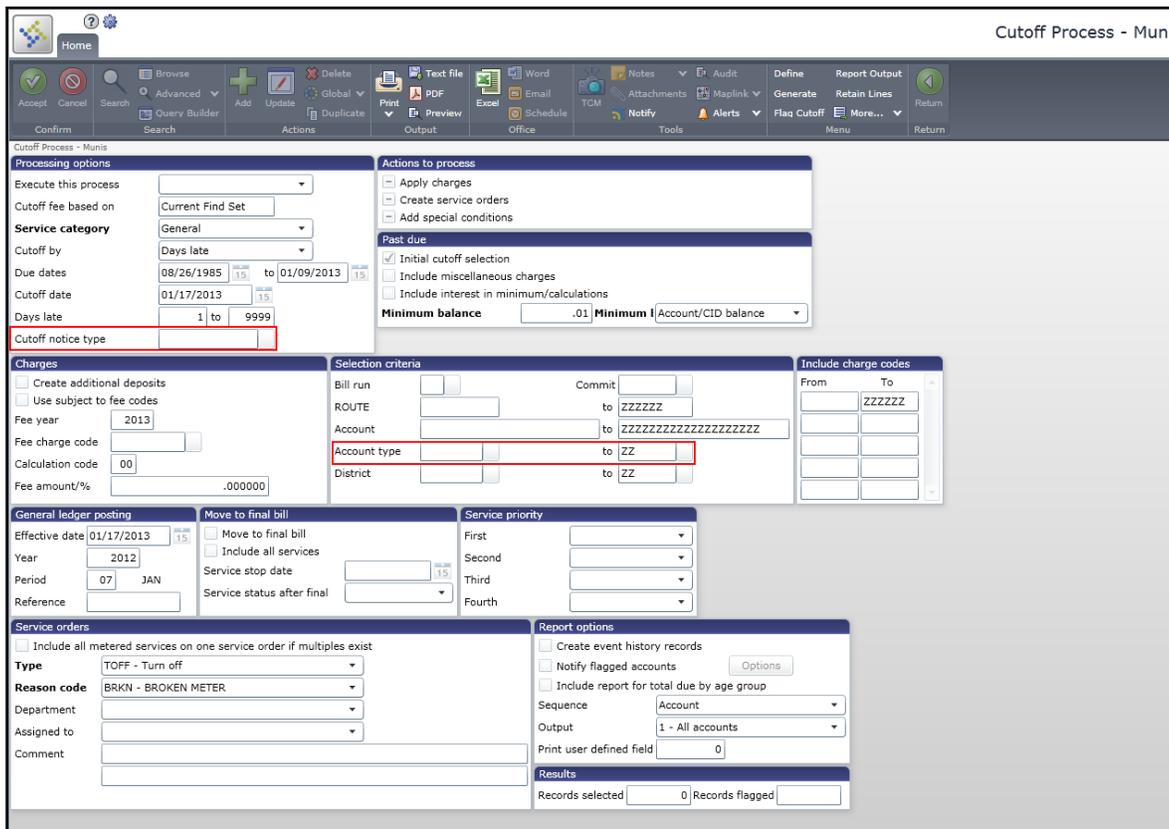
Within the Calculate Charges program, performance improvements have been made to the Calculate All step of the Bill Run Process. When executing this process in Munis Version 10.3, your organization should realize increased efficiencies that may vary in nature depending on your specific server configuration.





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.

The screenshot shows the 'Settings - Munis' application interface. The 'Site Options 1' tab is active. In the 'General' section, the 'Default vacant cid' field is highlighted with a red box and contains the value '0'. Other fields include 'Last meter #', 'Next bill #', 'Next abatement #', and 'Transfer run'. The 'Processing' section includes dropdowns for 'Process by', 'Estimate/Average by', 'Apply credits by', and 'Calculate late on'. The 'Proration' section has a 'Prorate from' dropdown and a 'Prorate zero days as' input field. The 'Liens' section has a 'Process option' dropdown and a checkbox for 'Debit tax receivable'. The 'Annualized billing' section has a 'Start date' field and a checkbox for 'Start new customer at tier 1'. The 'Deposit' section has a 'Deposit maximum' field. The 'EUSP credits' section has a 'State account' field and 'Misc codes' fields.

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 screenshot shows the 'Utilities - Munis' application interface. The 'Account' section displays a table with columns: Account, Parcel, Location, Start date, Type, ROUTE, Prop desc, Stop date, District, and Read sequence. Below the table are buttons for 'View/Modify Account', 'Service Orders', 'Special Conditions', 'Backflow Service Accounts', and 'Account Event History'. The 'Customer ID' section has 'View All' and 'Select All' buttons. Below is a table with columns: Name, Relation, Customer ID, Bill, Bill Address, Start Date, Stop Date, Non-Cash Type, and Non-Cash Deposit. At the bottom, the 'Utilities' section has a table with columns: Charge Code, Seq, Description, Type, Rate, Status, Billed Customer, Start Date, Stop Date, Deposit Collected, AR Category, and Route/Book. The 'Create Pending w/Vacant' button is highlighted with a red box.

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.

The screenshot shows the 'Utilities - Munis' application interface. The ribbon includes tabs for Home, Confirm, Search, Actions, Output, Office, Tools, Alerts, and Menu. The 'Tools' group contains icons for MapLink, Attachments, and Alerts. Below the ribbon is a data table with the following information:

Account	001001	Start date	07/04/2003	Stop date	12/31/9999
Parcel	00100200000	Type	R - RES	District	M - MUNIS
Location	23 BAY AVE MUNIS, US 12345	ROUTE	003	Read sequence	900
Prop desc					

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

The screenshot shows the 'Munis MapLink' application interface. The ribbon includes tabs for Home, Query, Geographic Tools, Map, and Application. The 'Map' group contains icons for Identify, Buffer, Polygon, Search, Location, Distance, Area, Layers, Background, Quick Zoom, Launch Munis, Set Defaults, Clear Set, and Return. The main area displays a GIS map with various utility assets and properties. The map shows a grid of parcels with various utility lines and points. The 'Query Results' panel on the left is empty, and the 'Active Set' panel is also empty. The 'esri' logo is visible in the bottom right corner.

## Utility Billing/Project Ledger Accounting

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

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

The screenshot shows the 'Charge Codes - Munis' application window. The 'General' tab is active. In the 'Additional Attributes' section, the 'Use for project accounting' checkbox is checked and highlighted with a red box. Other visible fields include 'AR code' (UB), 'Activity' (FEE - POST BILLING FEES), 'Description 1' (10% LATE FEE), 'Rate Information' (Amount: 10.000000), and 'Charge type' (M - MISCELLANEOUS ONE TIME CHARGES).

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

The screenshot shows the 'Charge Codes - Munis' application window with the 'Accounts' tab active. The 'Project Type' and 'Project String' fields are highlighted with a red box. The 'Account Title' field is also visible. The 'General' tab is also visible in the background.

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

# Tyler Notify

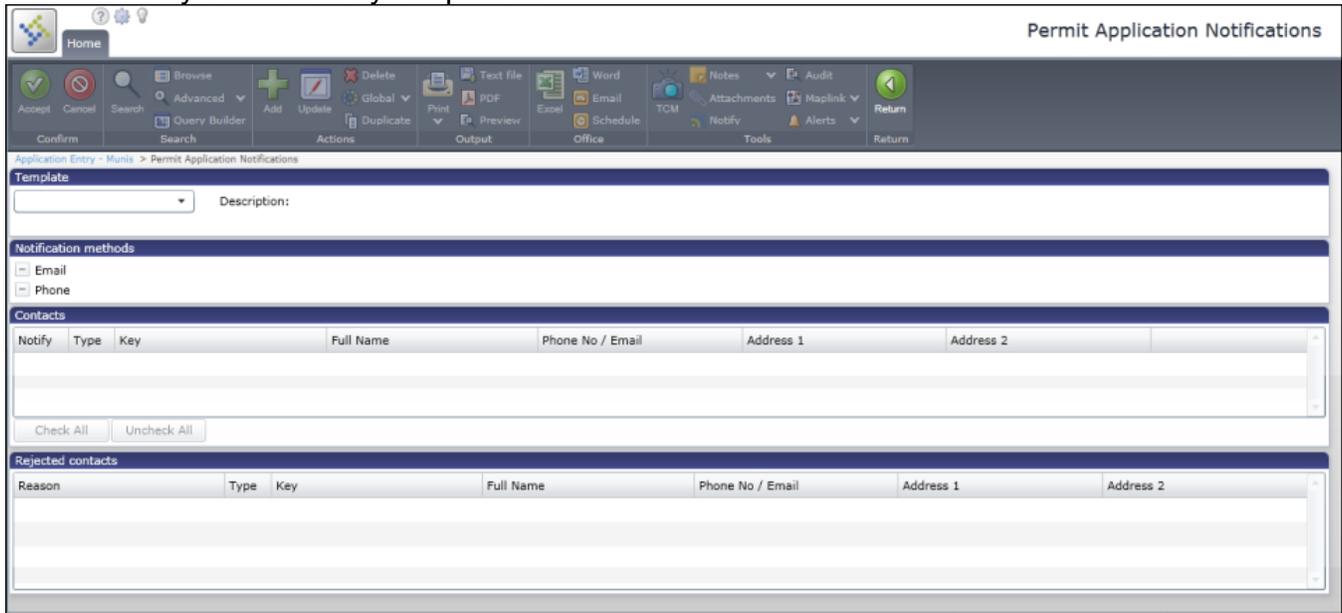
Munis is integrated with Tyler Notify to provide automated electronic notifications through telephone calls or emails. This feature requires that you purchase and install Tyler Notify. Once installed, the connection to Tyler Notify must be configured by entering the Tyler Notify base URL and Tyler Notify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



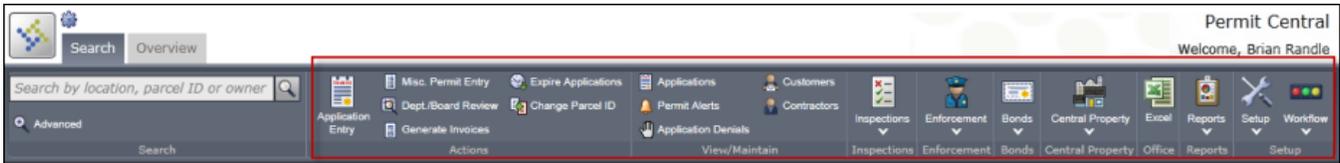
# Munis Centrals Programs

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.

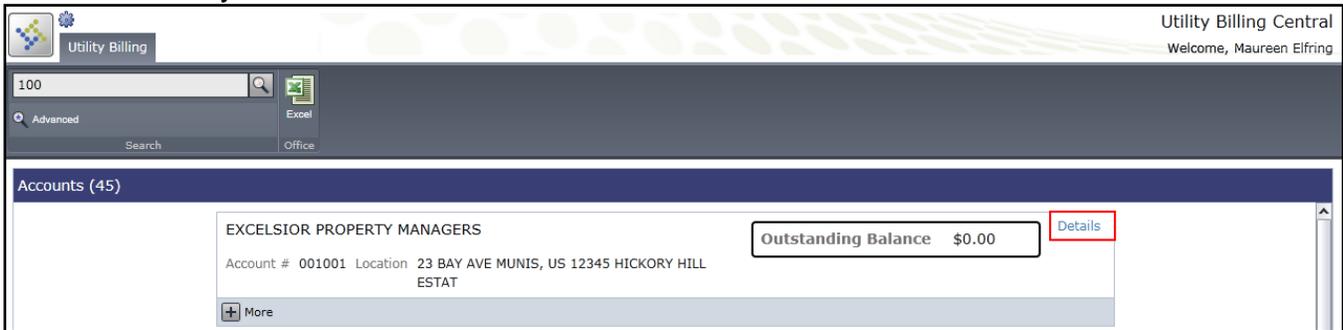
## Permit Central

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

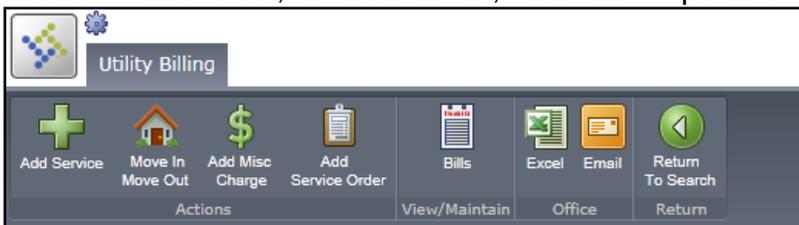


## UB Central

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 Effring

Utility Billing

[Add Service](#)
[Move In](#)
[Move Out](#)
[Add Misc Charge](#)
[Add Service Order](#)
[Bills](#)
[Email](#)
[Email](#)
[Return To Search](#)

[View/Maintain](#)
[Office](#)
[Return](#)

**EXCELSIOR PROPERTY MANAGERS**  
001001 23 BAY AVE MUNIS, US 12345 HICKORY HILL ESTAT

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

**Account Overview** [View/Maintain](#)

**Activity**  
 Payments | Bills | Charges | Services / Orders

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

**January, 2013**  
 Payments | Bills | Charges | Events  
 No payments found.

Outstanding **\$0.00**  
 Delinquent **\$0.00**  
 Account Start Date **07/04/2003**  
 Account Status **Active**

**Account Information** [View/Maintain](#)

[Alerts](#)  
[Active Services](#)  
[Charges Summary](#)  
[Backflow](#)

[Add New Service](#)  
[Move In/ Move Out](#)  
[Add Misc Charges](#)  
[Add Service Order](#)  
[Bill Maintenance](#)

Serial	Inspection Date	Inspection Status	Inspection Freq
43658792369		0	
3287483274		0	

**Customer Billing**

Name: EXCELSIOR PROPERTY MANAGERS  
 Billing Address: 1431 PAWTUCKET BLVD, MUNIS US 12345  
 No alternate addresses found.

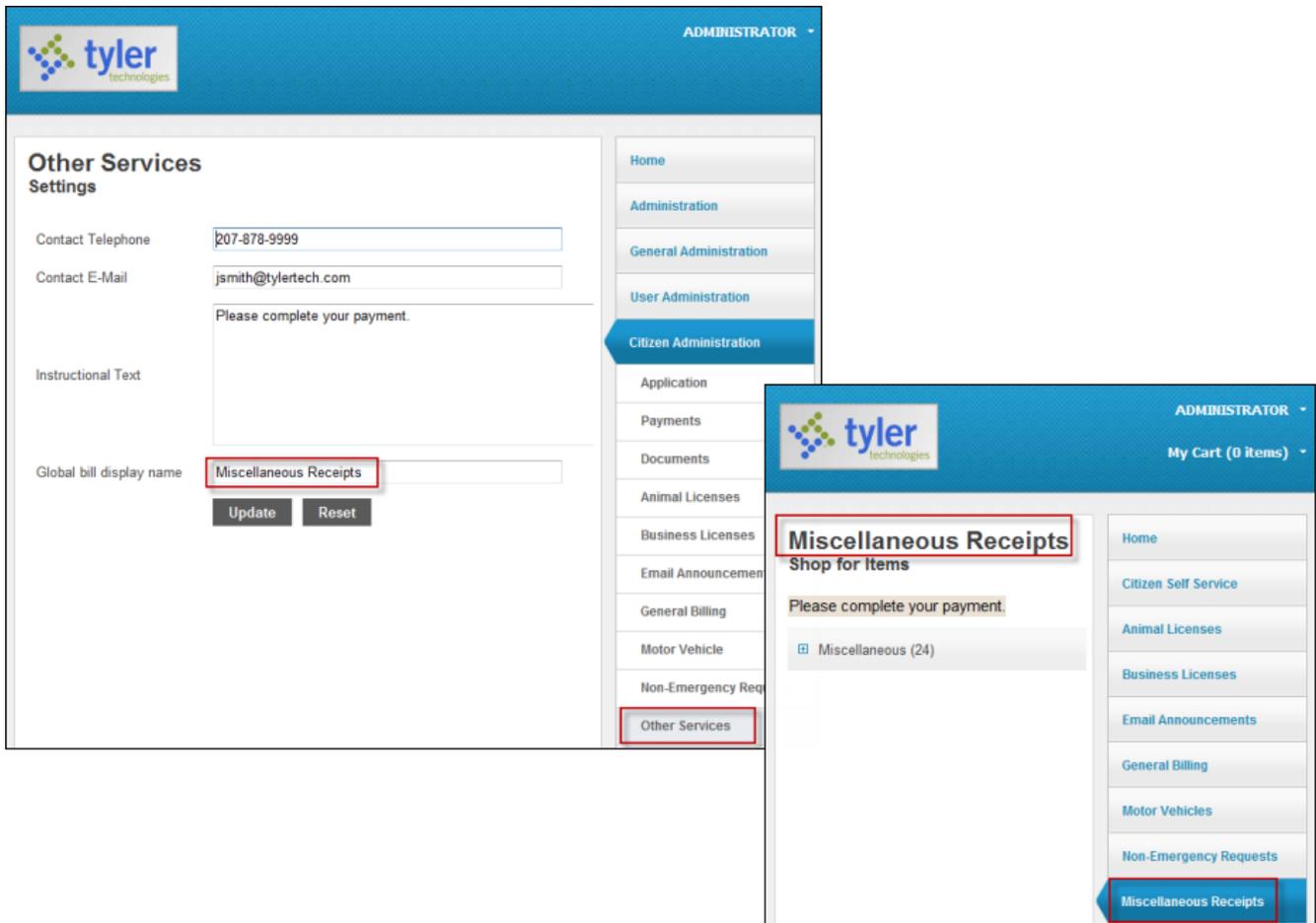
# Munis Self Service

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.

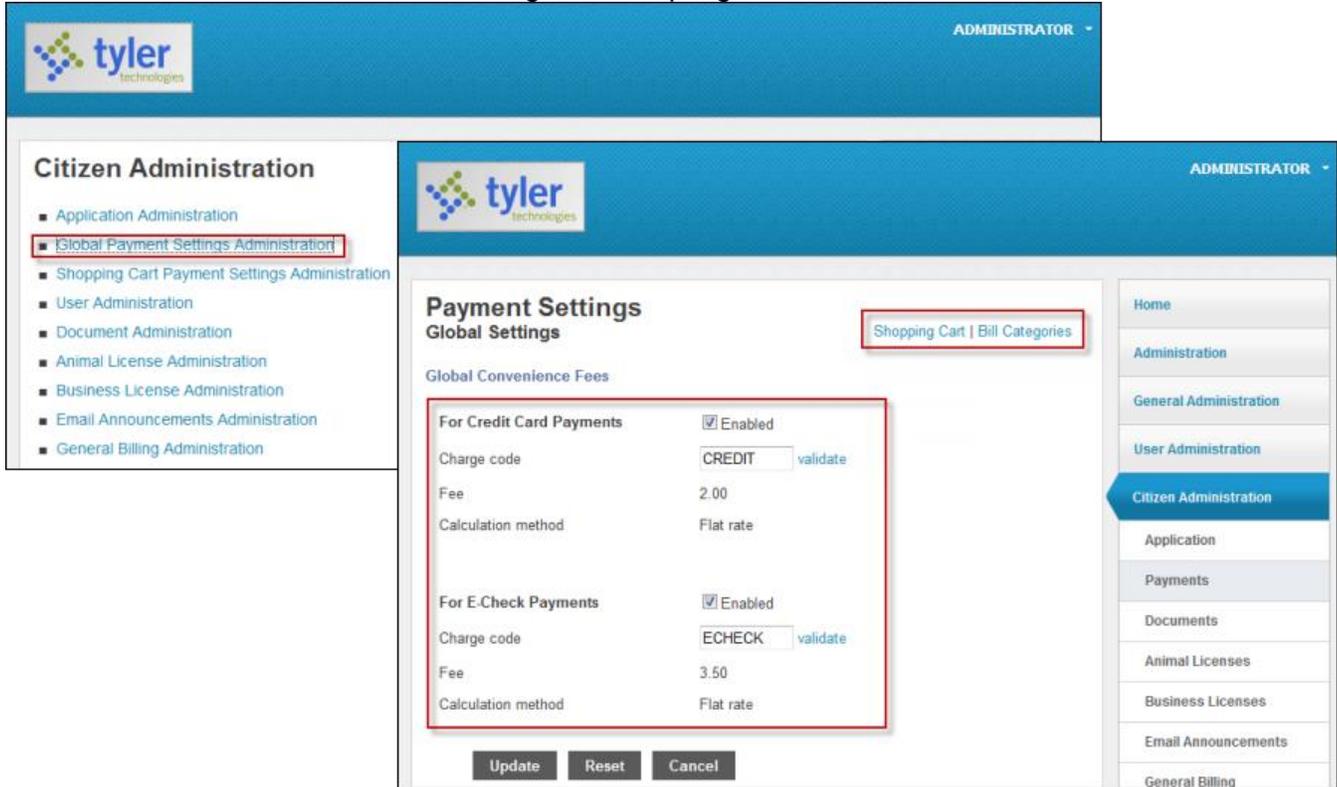
**Note:** The updates do not affect the administrative module names in Citizen Self Service Administration.



## 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.

## General Billing Settings

Contact Telephone

Contact E-Mail  
also used for change of address

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

Query Text

Global bill display name

Suppress display of Customer Type in search results

### Access Control

Access to General Billing

Allow linking to Linked Customer Accounts

Note: The Linked Customer Accounts feature is currently enabled.

### Search Field Setup

Customer Name  Page order

Customer ID  Page order

Number and Street  Page order

City  Page order

State  Page order

Zip Code  Page order

Parcel  Page order

Bill number  Page order

Bill year  Page order

Bill year search default  Collection year  Current year  None

Bill year search range calculation Current or collection year minus  to

(Enter 0 for none)

Current or collection year plus

[Home](#)

[Administration](#)

[General Administration](#)

[User Administration](#)

**[Citizen Administration](#)**

[Application](#)

[Payments](#)

[Documents](#)

[Animal Licenses](#)

[Business Licenses](#)

[Email Announcements](#)

**[General Billing](#)**

[Motor Vehicle](#)

[Non-Emergency Requests](#)

[Other Services](#)

[Parking Tickets](#)

[Permits Inspections](#)

[Personal Property](#)

[Real Estate](#)

[Utility Billing](#)

[Employee Administration](#)

[Vendor Administration](#)

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

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


ADMINISTRATOR ▾
My Cart (0 items) ▾

## General Billing

### Manage Bills

Customer: FRITZ, MICHAEL  
 Address: 1 COLE HAAN DRIVE, YARMOUTH, ME 04096  
 Customer number: 187

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

**As of**

Total Unpaid: 3035.00

Total Balance Due: 3035.00

Add selected bills to cart

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

Munis® Major Enhancements, Version 10.3 Revenues

Page 43

## 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 bank's nine digit code and email messages mask all but the last three digits of the customer's bank account number.

**tyler** technologies

ADMINISTRATOR ▾  
My Cart (0 Items) ▾

### Utility Billing Automatic Payments

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

Service Address 46 MAINE STREET  
Account Number BC121

Bank name \*   
Routing number \* 9 digits  
Bank telephone \*  
Account number \*  
Account type \*  
Your name \* GRIFFIN, PETER  
Your telephone number \* 207 555 7532  
Your email address \* PGRIFIN@YAHOO.COM

ASSOCIATED BANK - 075901121  
BANK OF AMERICA - 111000025  
BANK OF AMERICA - 061477986  
CHASE MANHATTAN BANK - 239848554  
CITIBANK - 388554498  
FLEET BANK - 182273221  
NATIONS BANK - 192832115

Checking  
 Savings

\* indicates required values.

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

# Available Web Parts

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.

<b>Web Part</b>	<b>Description</b>
<b>Tyler Dashboard</b>	
My Tyler Community	Provides direct access to Tyler Community items such as forums, conversations, and groups.
<b>Munis</b>	
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.