Munis Revenues

Major Enhancements
Version 10.5
April 21, 2014

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 10.5. Revenues programs include Citizen Self Service (CSS) and central programs.

The Munis Revenues product contains General Revenues and Property Revenues:

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

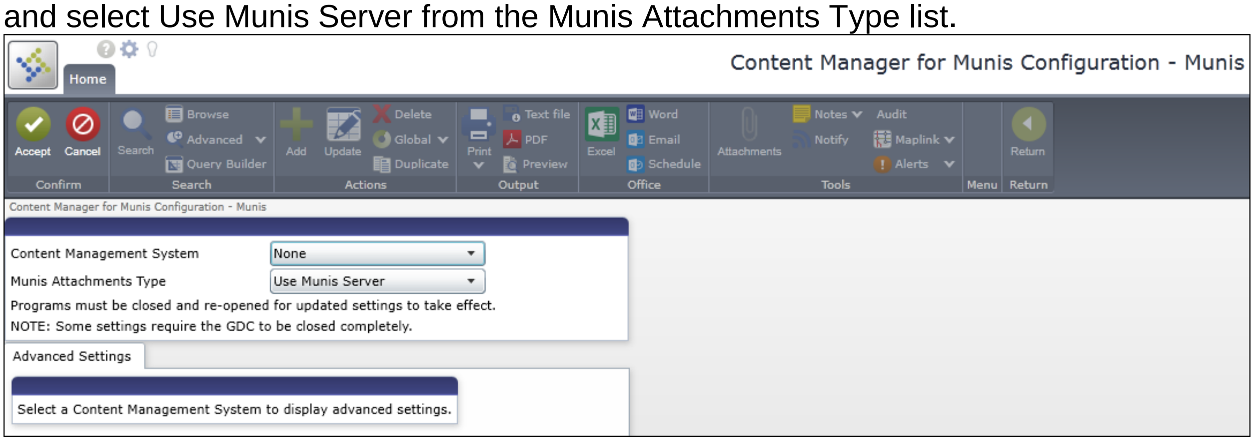
Please refer to the Version 10.5 Munis Release Notes on the Munis Knowledgebase (http://muniskb.tylertech.com/search.aspx) for information regarding state-specific updates and all other changes not covered in this document.

Attachments, Tyler Content Manager

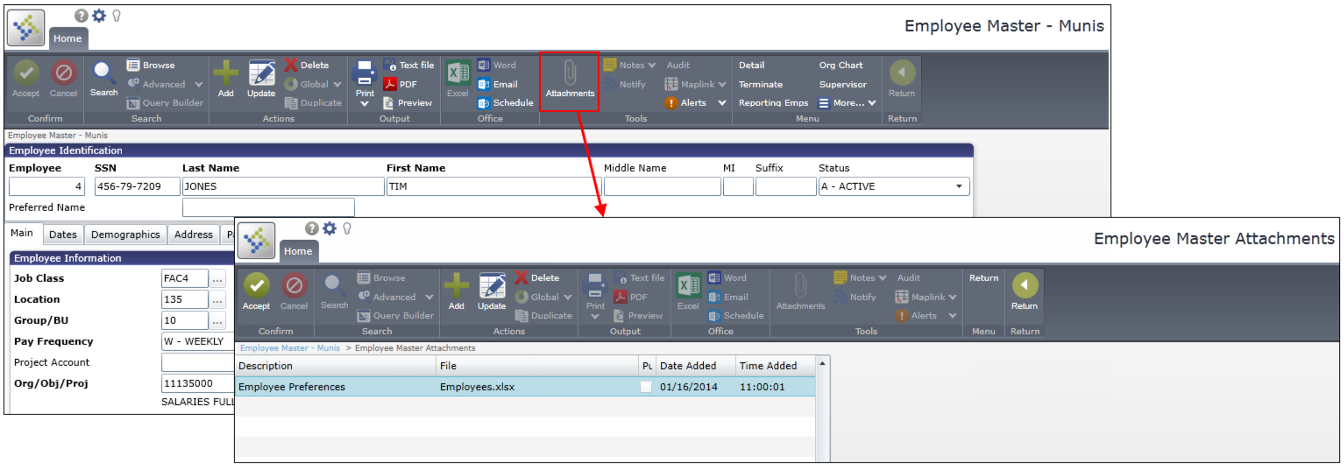
In the Tools group of the ribbon, the TCM [] button is removed and the Attachments [] button is the single option for attaching and storing documents in Munis.

To use either attachment process in Munis, you must ensure that in the Roles – Munis System program, the View Attachments and Associated Documents check box is selected. This permission makes the Attachments button accessible on the ribbon.

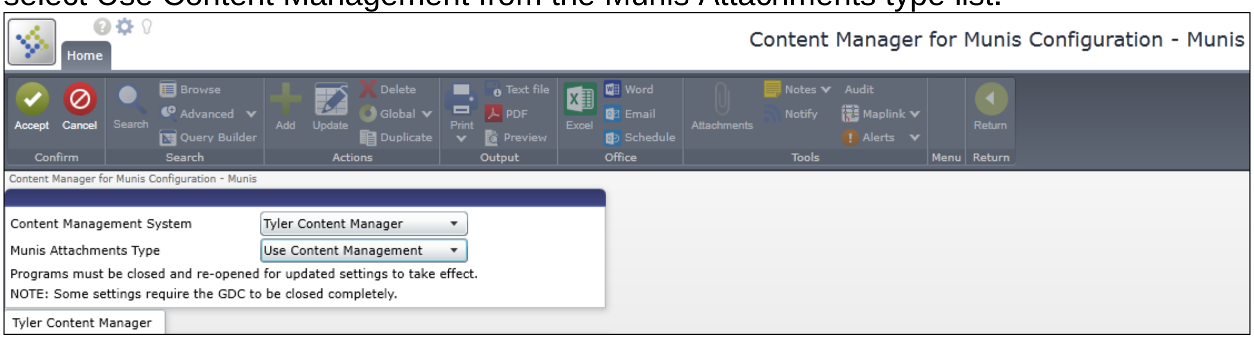
To use the standard Munis attachments screen and store documents on your Munis server, in the TylerCM for Munis Settings program, select None from the Content Manager System list and select Use Munis Server from the Munis Attachments Type list.



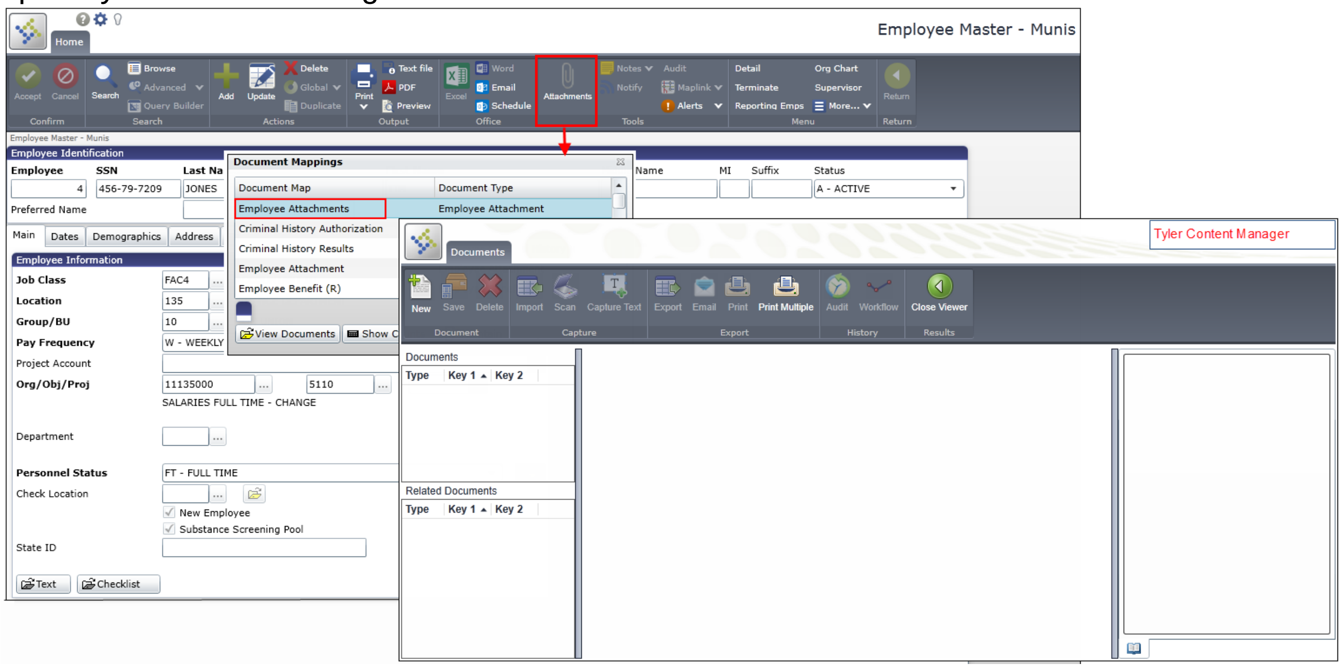
In this case, when you click Attachments in the ribbon, the program displays the standard Munis Attachments screen, where you can attach new document files or maintain existing attachments.



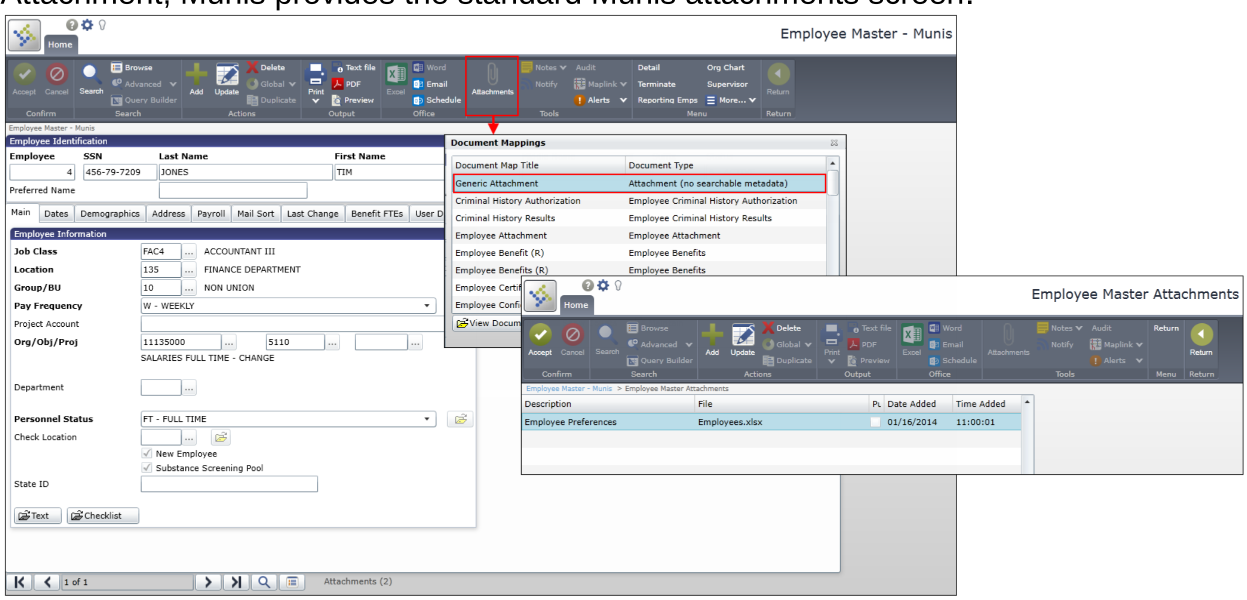
To use Tyler Content Manager to store and retrieve documents, in the TylerCM for Munis Settings program, select Tyler Content Manager from the Content Manager System list and select Use Content Management from the Munis Attachments type list.



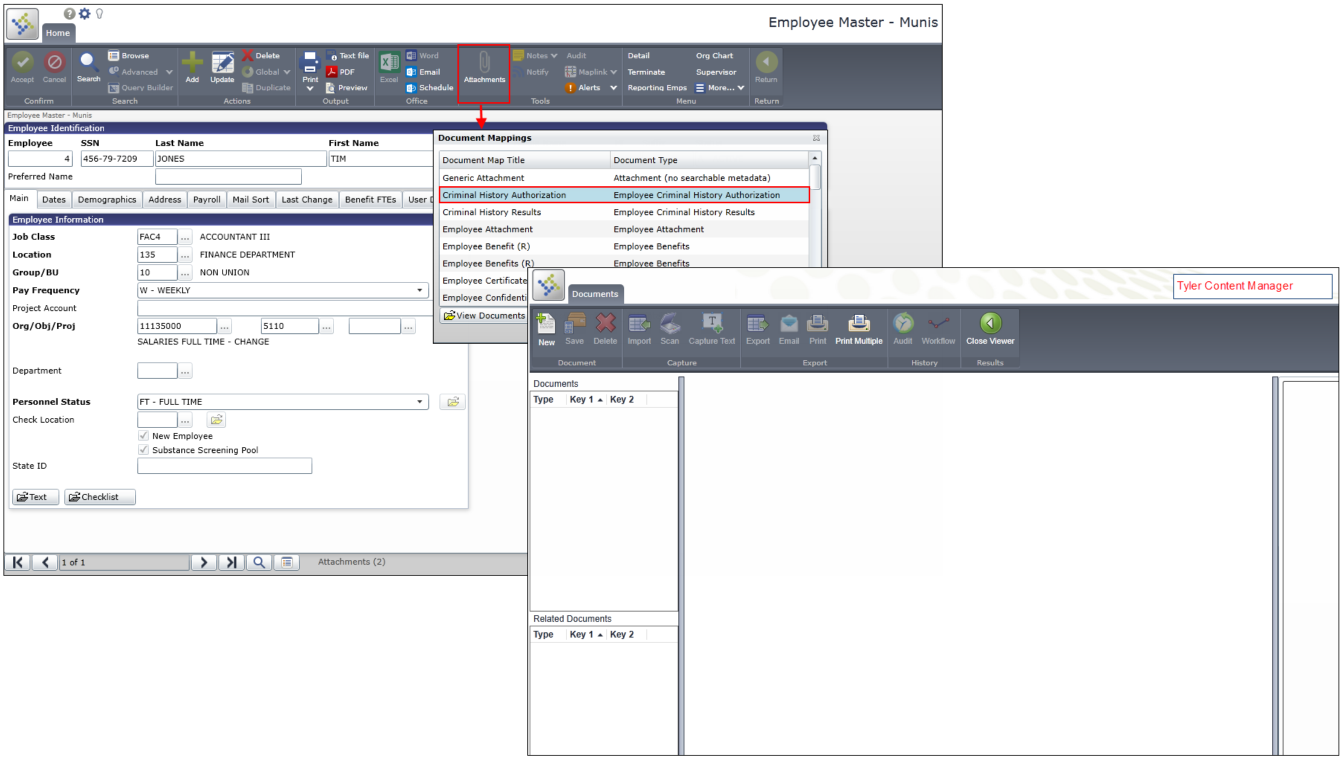
In this case, when you click Attachments, Munis provides the Document Mappings box. Double-click a document map type or highlight a document map and click View Documents to open Tyler Content Manager.



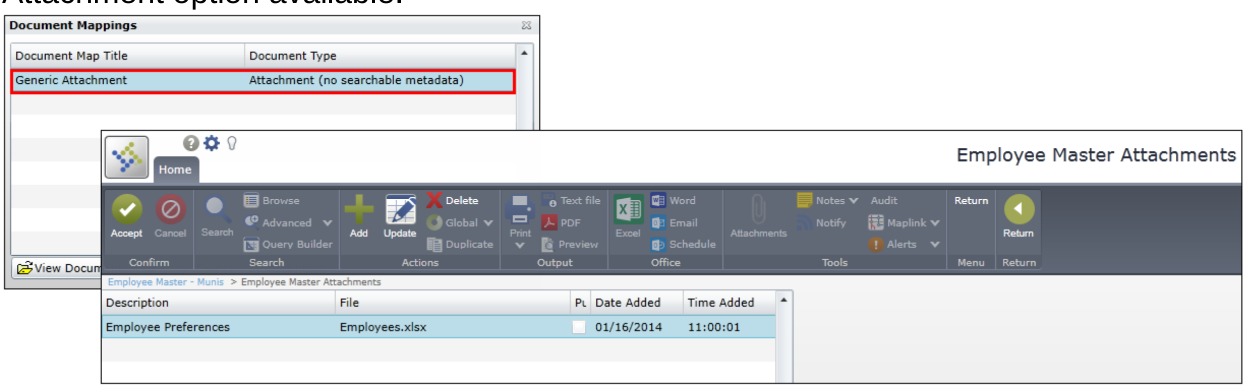
If your organization uses Tyler Content Manager and in the TylerCM for Munis Settings program, the value of the Content Manager System list is Tyler Content Manager and the value of the Munis Attachment Type list is Use Munis Server, when you click Attachments, the Munis program displays the Document Mappings dialog box. When you double-click Generic Attachment, Munis provides the standard Munis attachments screen.



When you double-click a mapping, Munis opens Tyler Content Manager.



If your organization does not use Tyler Content Manager, but the settings in the TylerCM for Munis Settings program are set to Tyler Content Manager and Use Munis Server, when you click Attachments, Munis provides the Document Mappings box with only the Generic Attachment option available.



Double-click this option, or highlight the option and click View Documents, to display the standard Munis Attachments screen.

Once you open either Munis Attachments or Tyler Content Manager, the procedures for managing attachments within those applications have not changed.

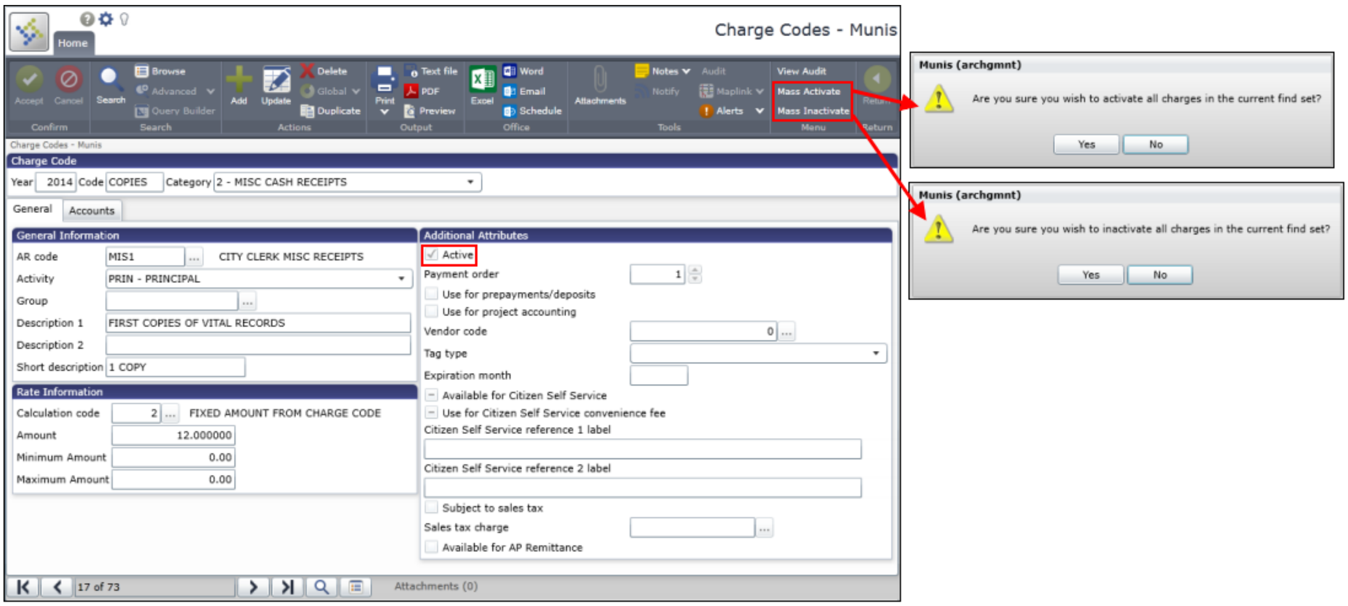
Note: If your organization uses Laserfiche®, the TCM button remains available and there are no changes to the access or use of your content management system.

Accounts Receivable

The following changes apply to Munis Accounts Receivable programs.

Accounts Receivable Charge Codes

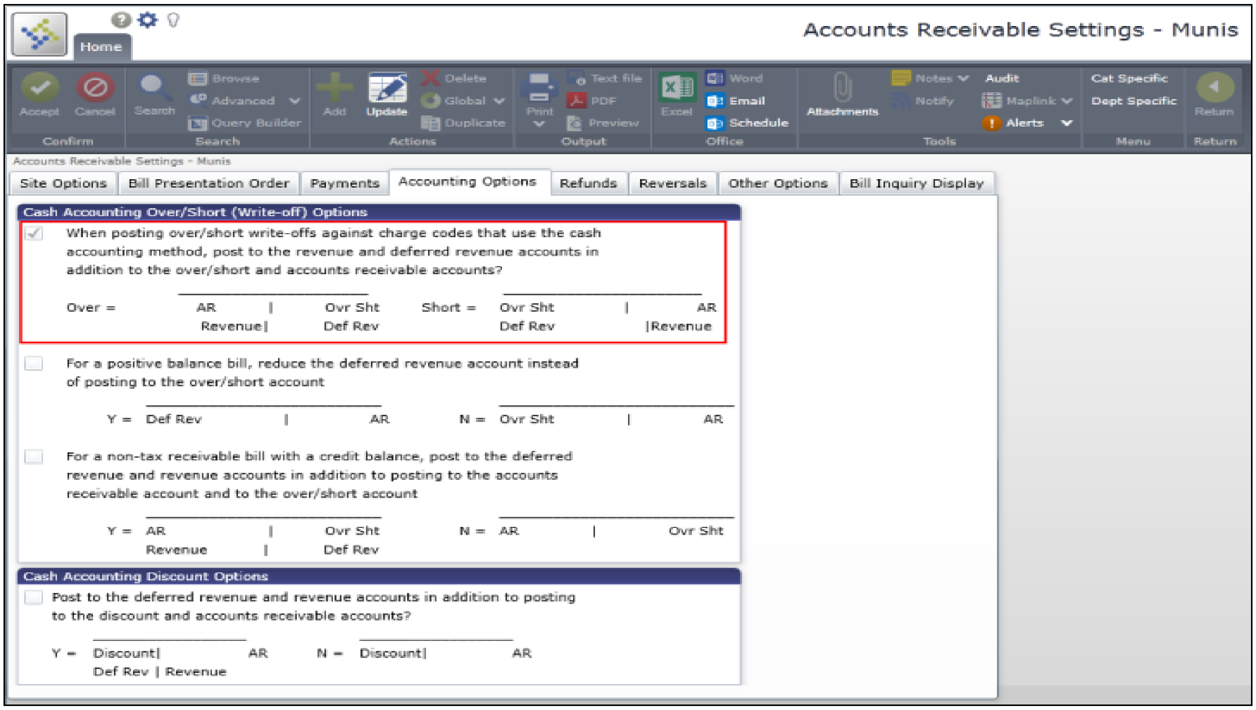
The Mass Activate and Mass Inactivate buttons activate or inactivate all charge codes in the current active set. Once you click Mass Activate or Mass Inactivate, the program displays a confirmation message. Click Yes to activate or inactivate the group of charge codes.



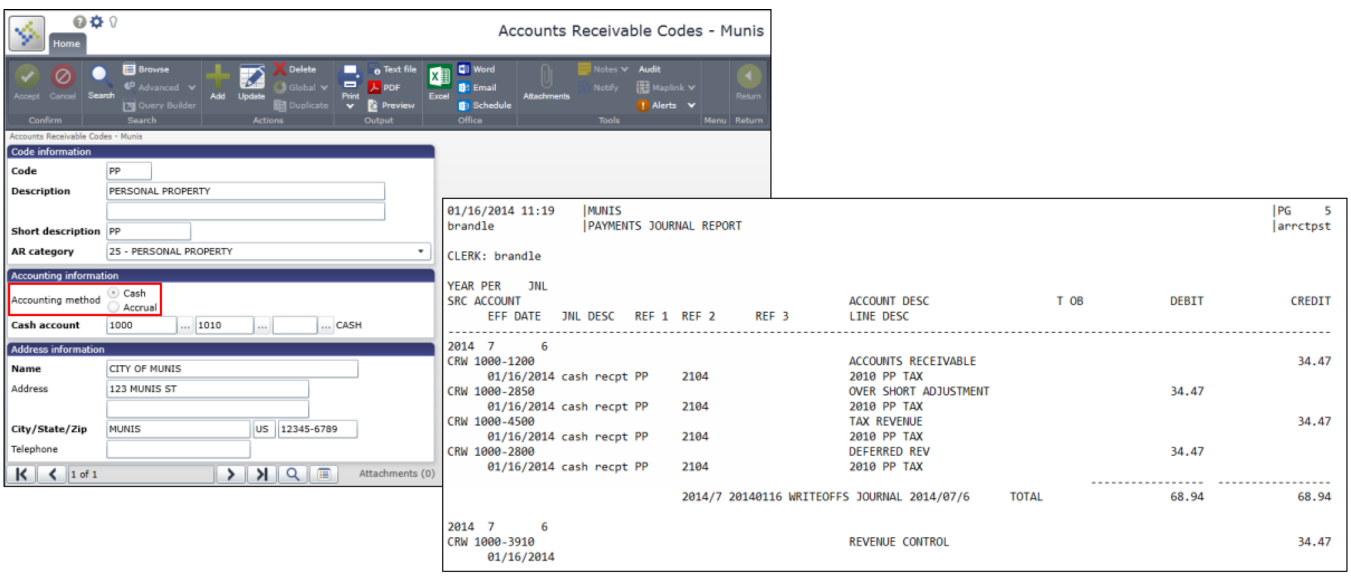
The Microsoft® Excel export includes the following general ledger accounts: Abatement, Accounts Receivable, Cash, Deferred Revenue, Deposit, Discount, Exemption, Interest Revenue, Liability, Over Short, and Revenues lines 1 to 5.

Accounts Receivable Settings

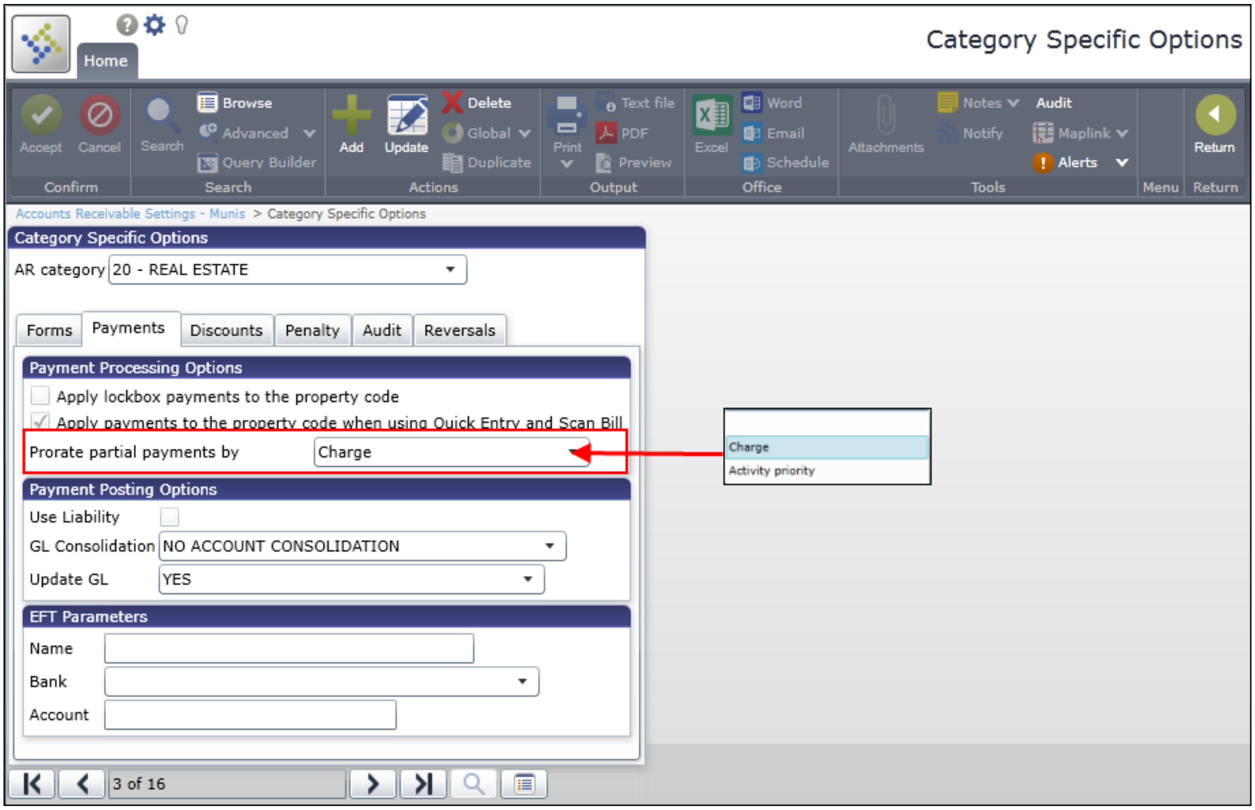
The When Posting Over/Short Write-Offs Against Charge Codes that Use the Cash Accounting Method, Post to the Revenue and Deferred Revenue Accounts in Addition to the Over/Short and Accounts Receivable Accounts check box is available.



When the check box is selected and you post an over/short adjustment batch, the Revenue and Deferred Revenue accounts are included with the Over/Short and Accounts Receivable accounts if the accounts receivable code uses the cash accounting method.



The Prorate Partial Payments By list is available on the Payments tab of the Category Specific screen for categories other than Category 2 (miscellaneous cash receipts) and Category 45 (payment plans).



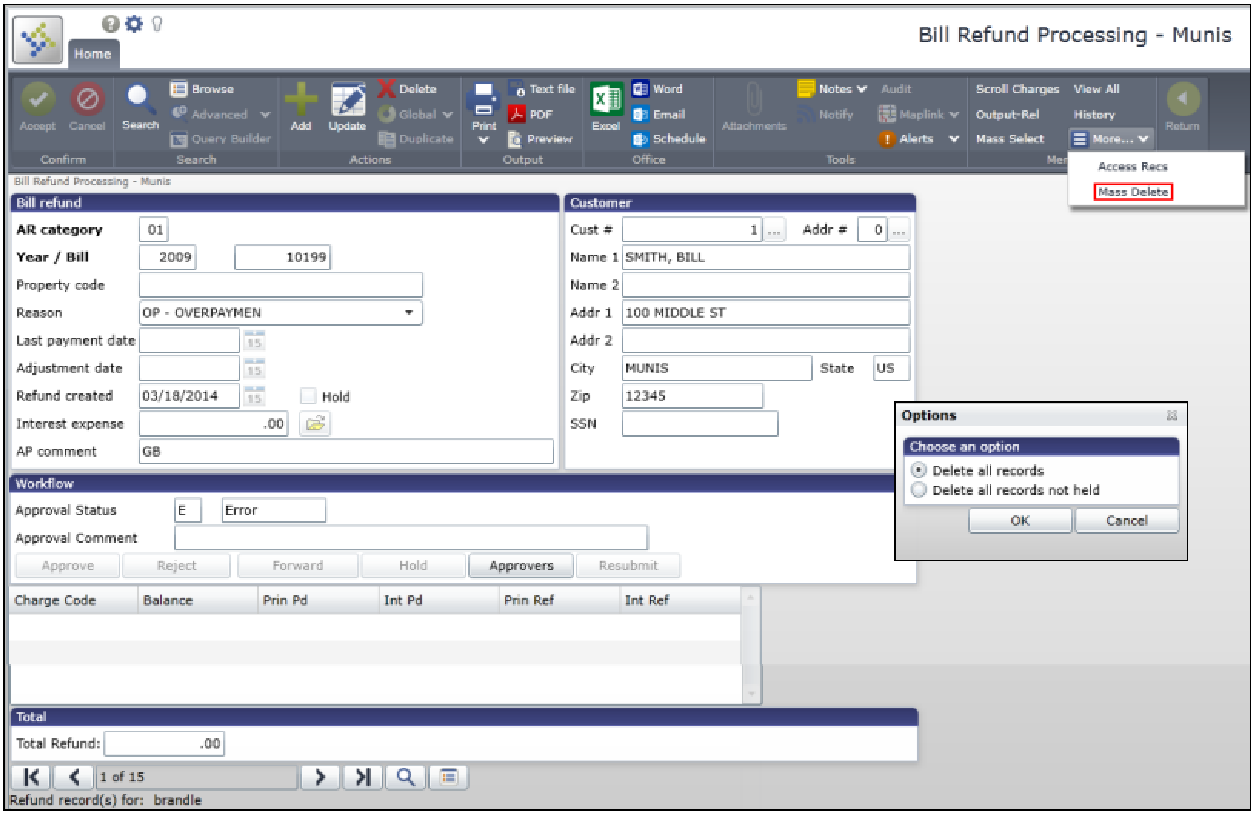
The list includes Charge or Activity Priority options that provide the following results:

- When you select the Charge option, partial payments prorate according to a predefined formula, with all fees and interest paid first.
- When you select the Activity Priority option, the total bill balance divides into three sections: principal-based charges, fees, and interest charges. Calculations determine how much of the total bill each section represents.

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

Bill Refund Processing

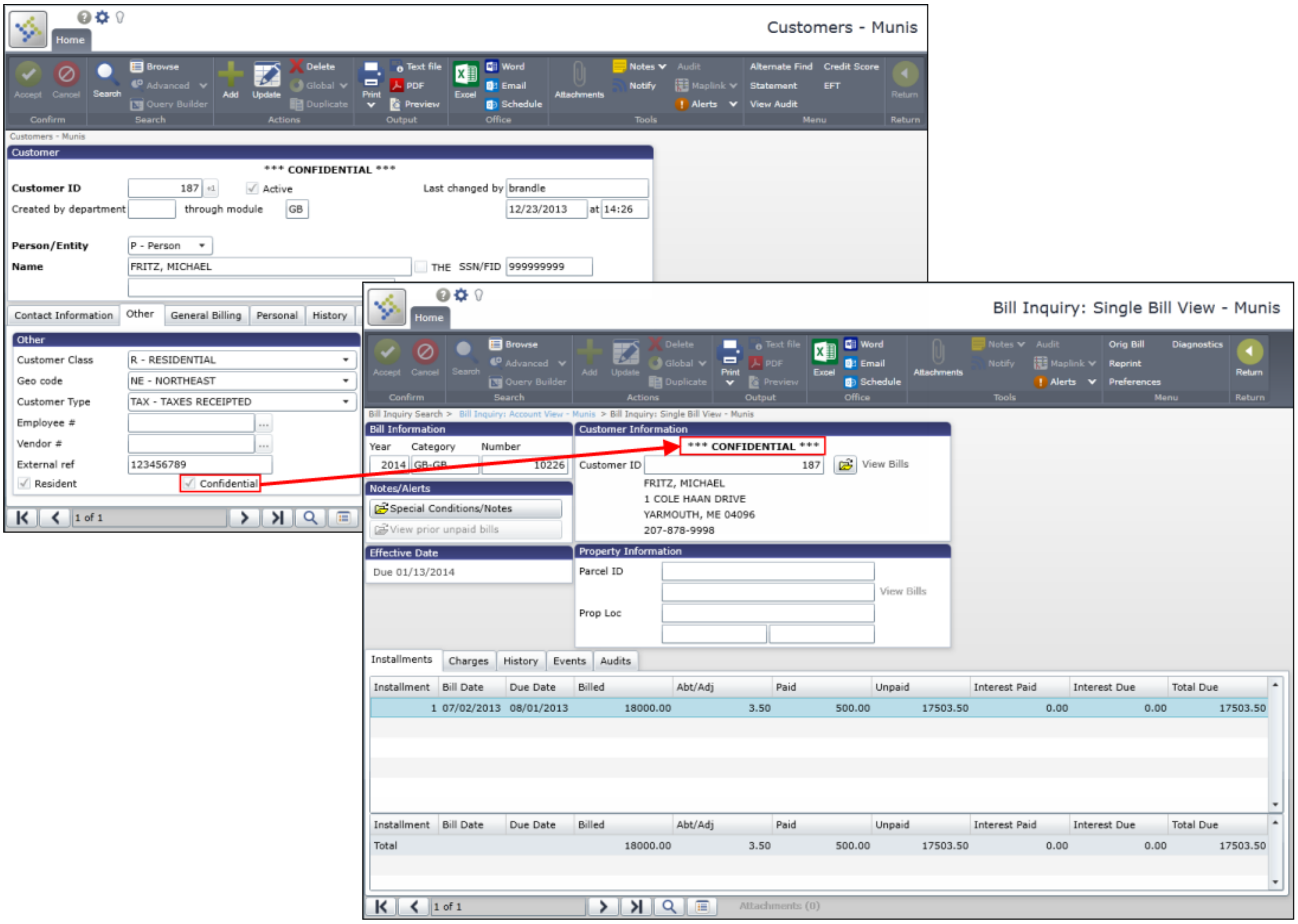
When you click More in the Menu group and then click Mass Delete, the program provides the option dialog box where you can choose to delete all records or delete only those records that are not held.



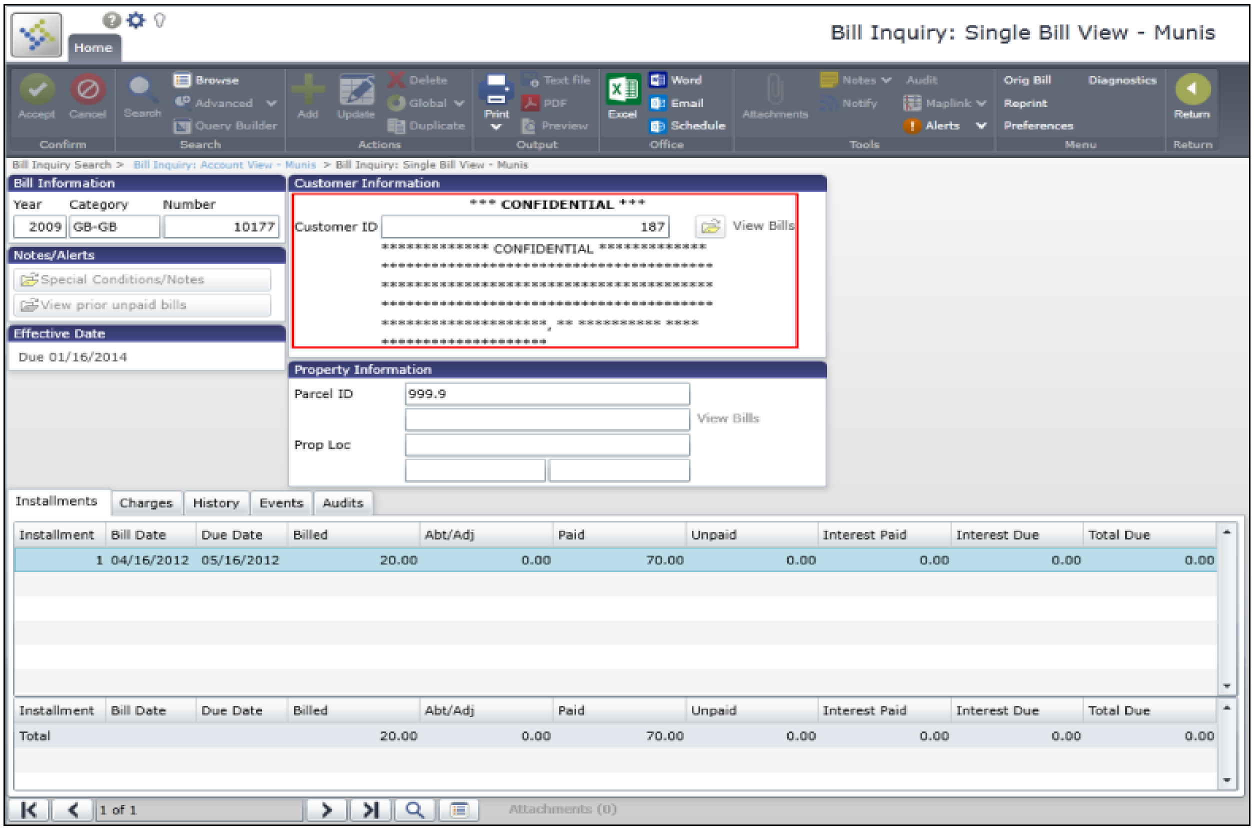
Once you click OK, a confirmation message prompts you to click Yes, Delete to remove the records.

Customers

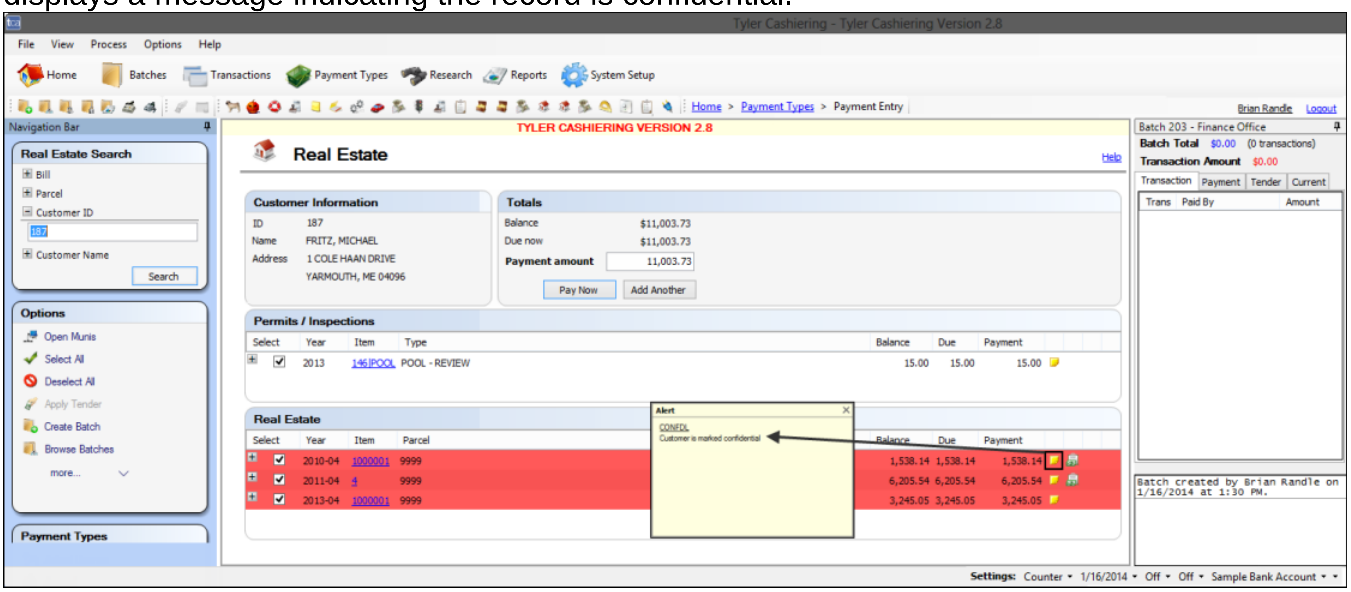
When the Confidential check box is selected for a customer on the Other tab in Customers, the Customers, Bill Inquiry, and Payment Entry programs display "Confidential" in bold letters for records related to the customer. The Confidential message displays only if the Restrict to 'Public Access' Use Only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



When the Restrict to 'Public Access' Use Only check box is selected in the Munis System group in Roles, the customer information is masked by asterisks. Reports and export files also contain asterisks for customer information when the Restrict to 'Public Access' Use Only check box is selected.

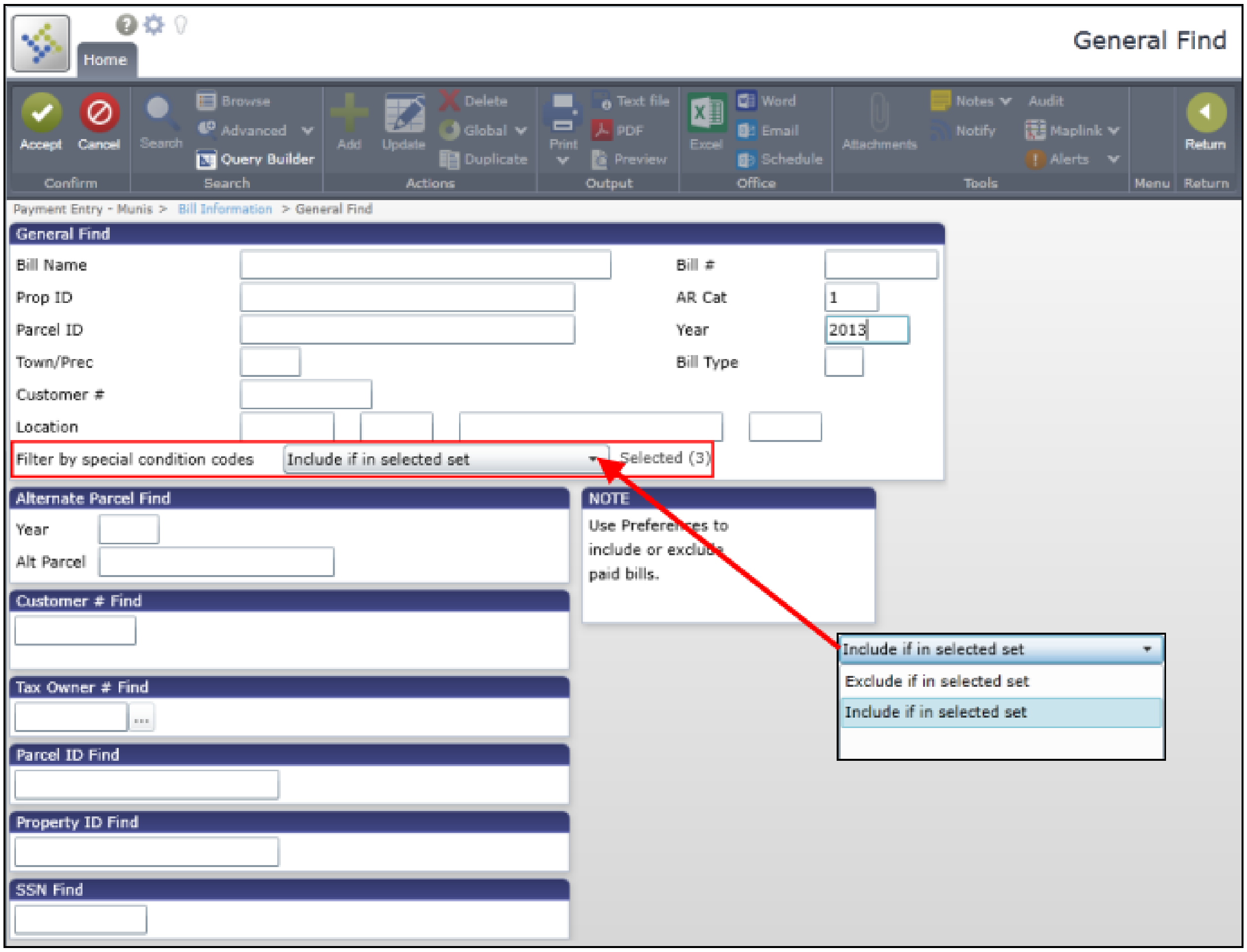


If your site uses Tyler Cashiering and you click the Alert button, the Payment Entry screen displays a message indicating the record is confidential.



Payment Entry, Bill Inquiry

The Filter by Special Condition Codes list is available on the General Find screen of Payment Entry and Bill Inquiry. Use this list to filter special condition codes on bills based on the Exclude if in Selected Set or Include if in Selected Set options. Once you choose an option, click the Selected button to identify the special condition codes to exclude or include in the record search.

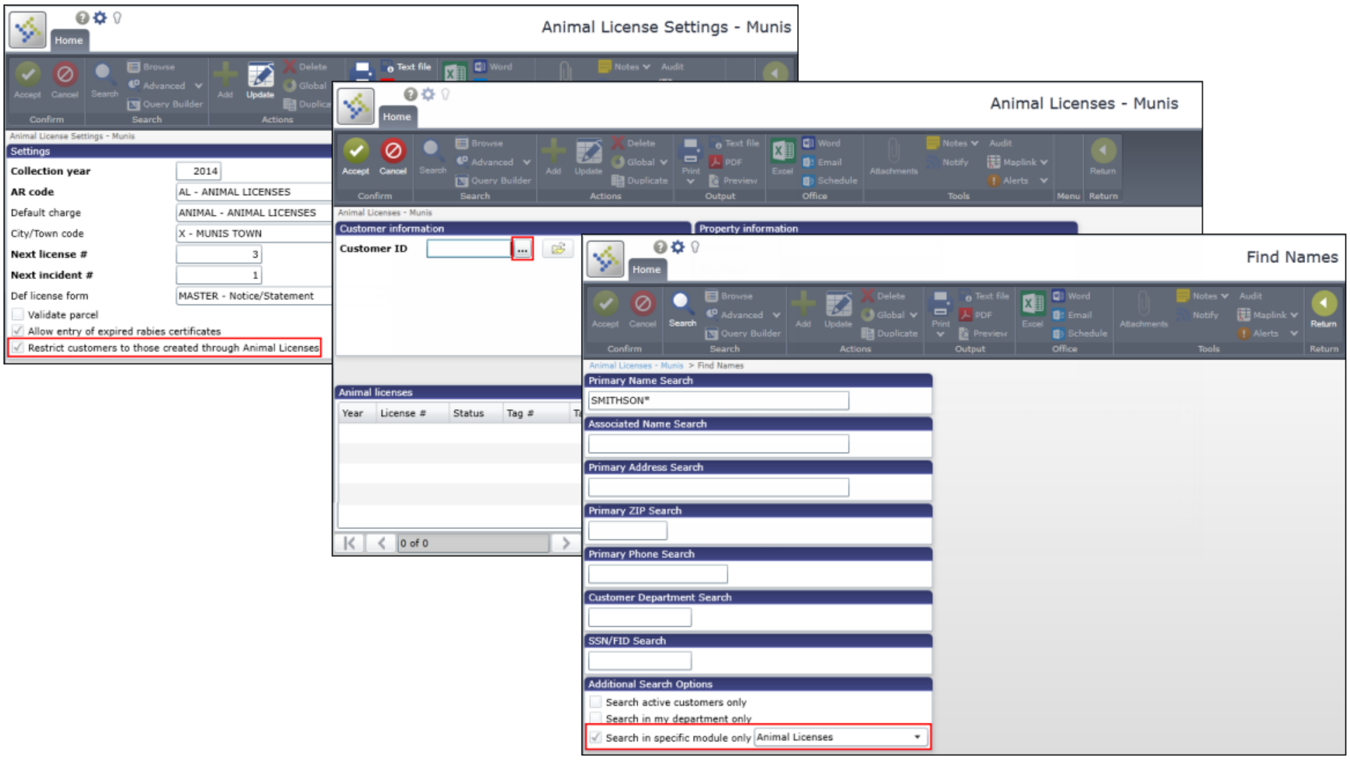


Animal Licenses

The following change applies to Munis Animal License programs.

Animal License Settings

When you select the Restrict Customers to Those Created Through Animal Licenses check box, only those customer records that are created through Munis Animal Licenses are available to the Animal Licenses program when searching names on the Find Names screen.



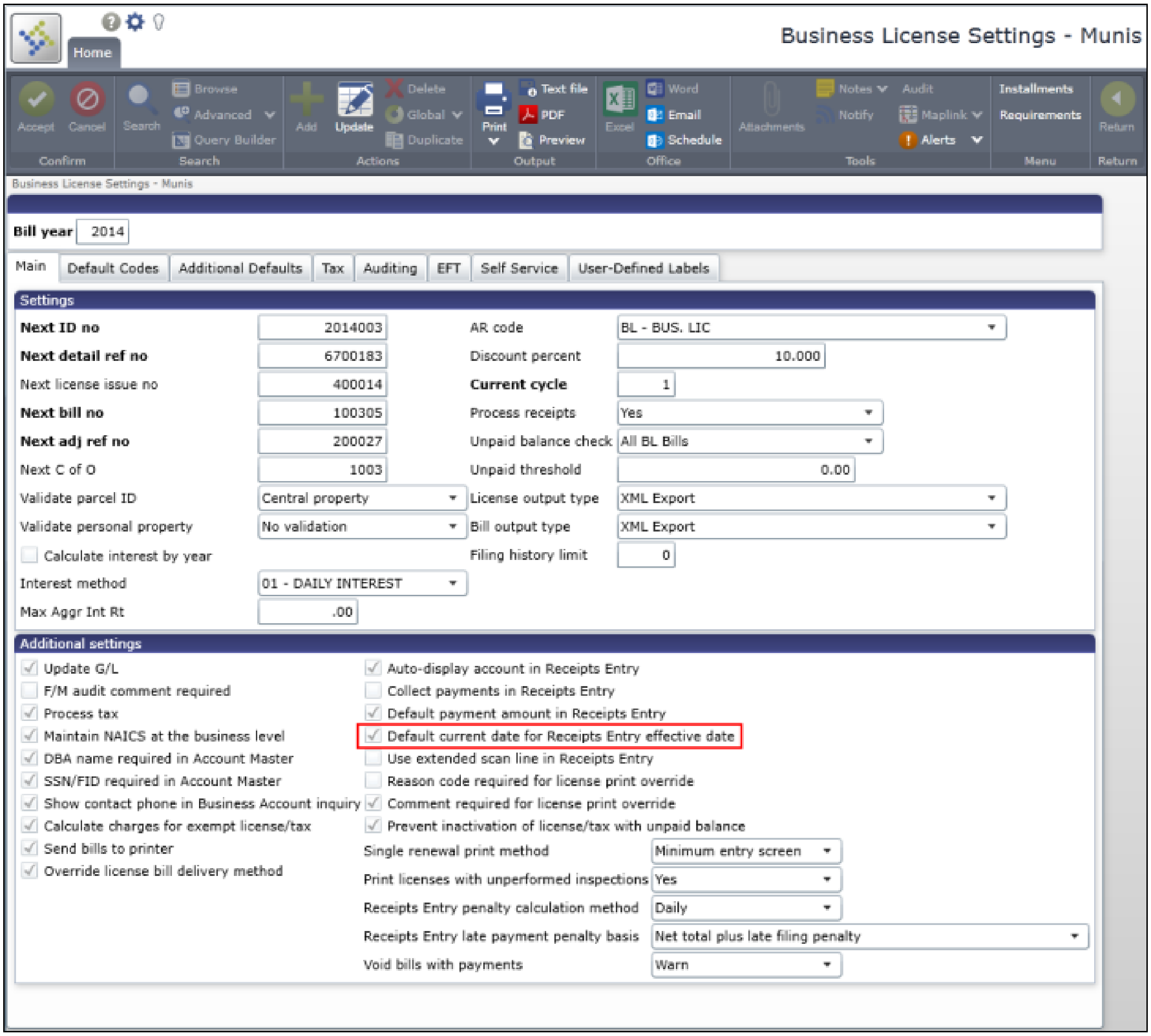
Business Licenses

The following changes apply to Munis Business License programs.

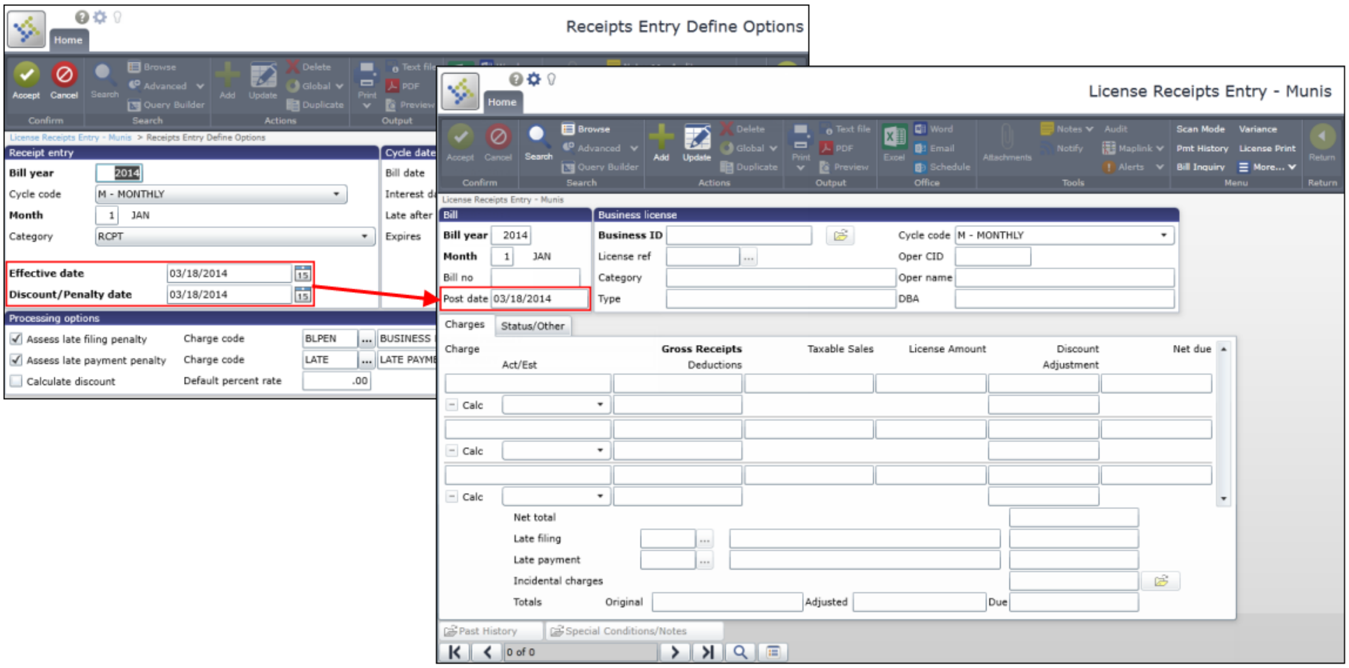
Business License Settings

The Main tab in Business License Settings provides the Default Current Date for Receipts Entry Effective Date check box in the Additional Settings group.

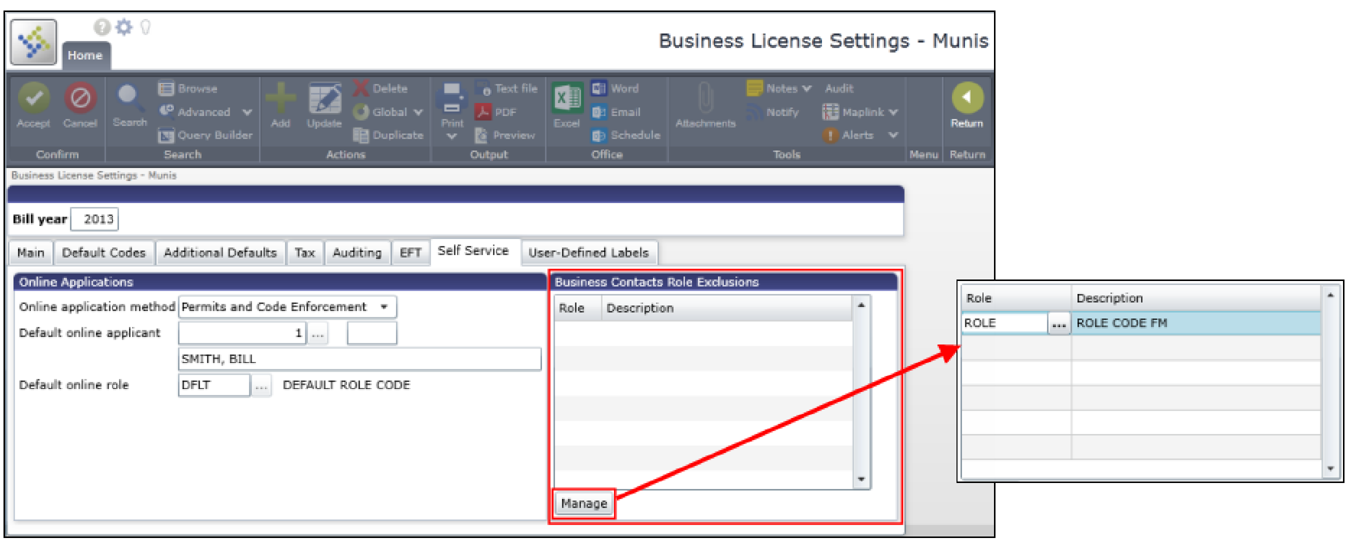
Note: The check box is only available for use when the Collect Payments in Receipts Entry check box is not selected.



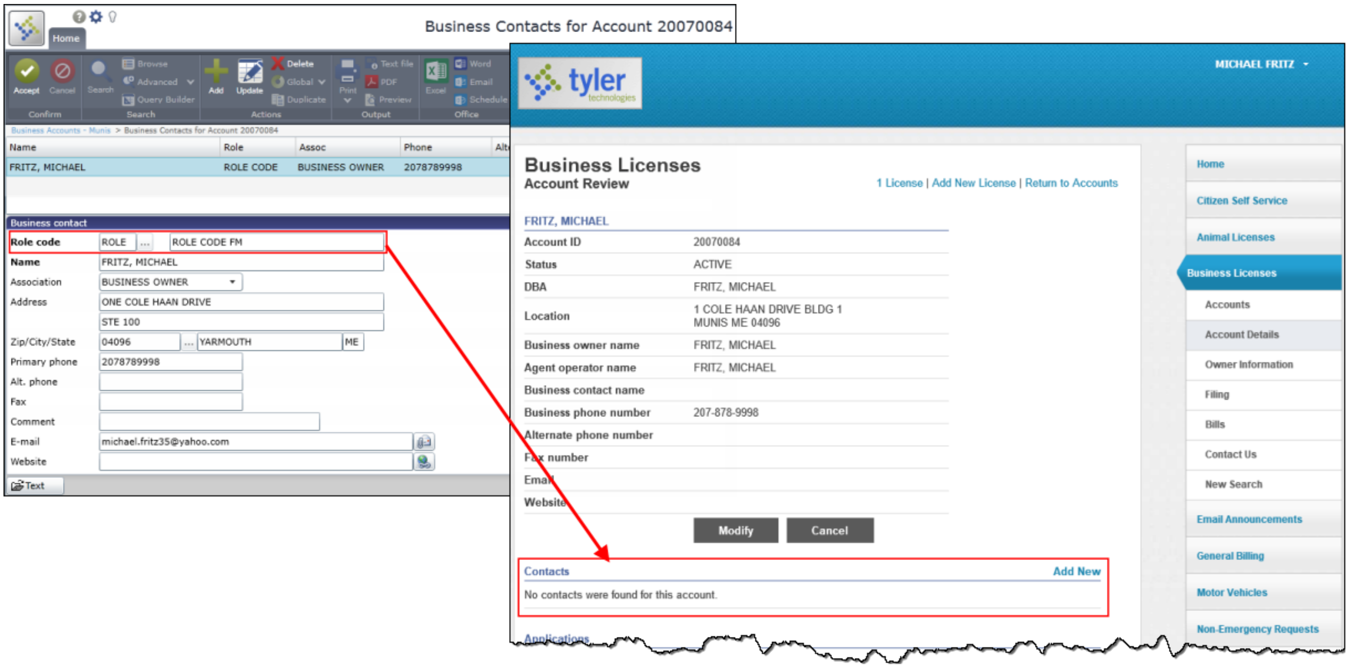
When the Default Current Date for Receipts Entry Effective Date check box is selected, the Receipts Entry program uses the current date for the Effective Date, Discount/Penalty Date, and Post Date instead of the most recent date that was entered. You can override the setting in Receipts Entry by clicking the Define button and then updating the field values, or clicking Alter Settings in the Menu group on the processing screen.



The Self Service tab contains the Business Contact Role Exclusions group. When you click the Manage button, you can select a role for business contacts to exclude in Citizen Self Service.



When the Role is selected for exclusion, the Business License Account Review page in Citizen Self Service does not display the contact in the Contacts group.

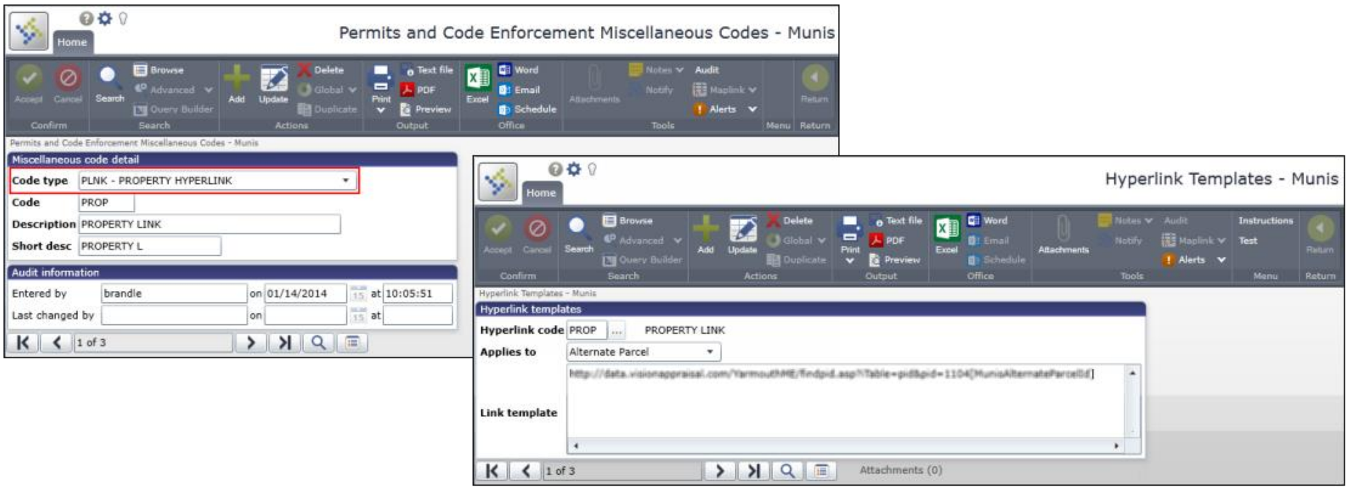


Central Property

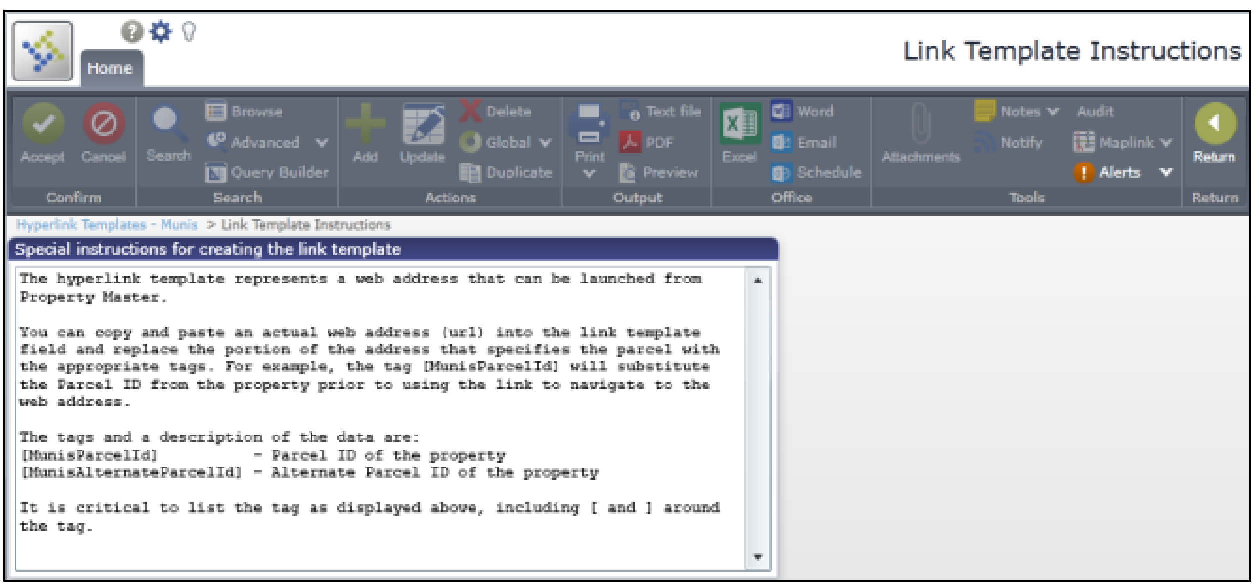
The following changes apply to Munis Central Property programs.

Hyperlink Templates

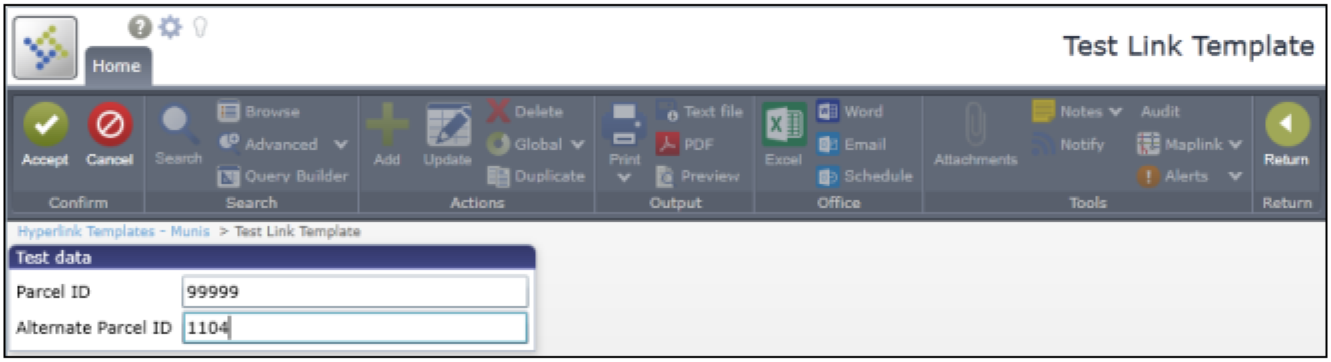
The Hyperlink Templates program uses a code type, which is created in the Permits and Code Enforcement Miscellaneous Codes program, to link a property record in Property Master to a website address that contains the parcel ID or alternate parcel ID of the property record. You may also use the Hyperlink Template to link the parcel to a website that allows you to access the property data, but does not contain the parcel ID or alternate parcel ID in the URL.



Click Instructions in the Menu group of Hyperlink Templates to display instructions for creating the link template.



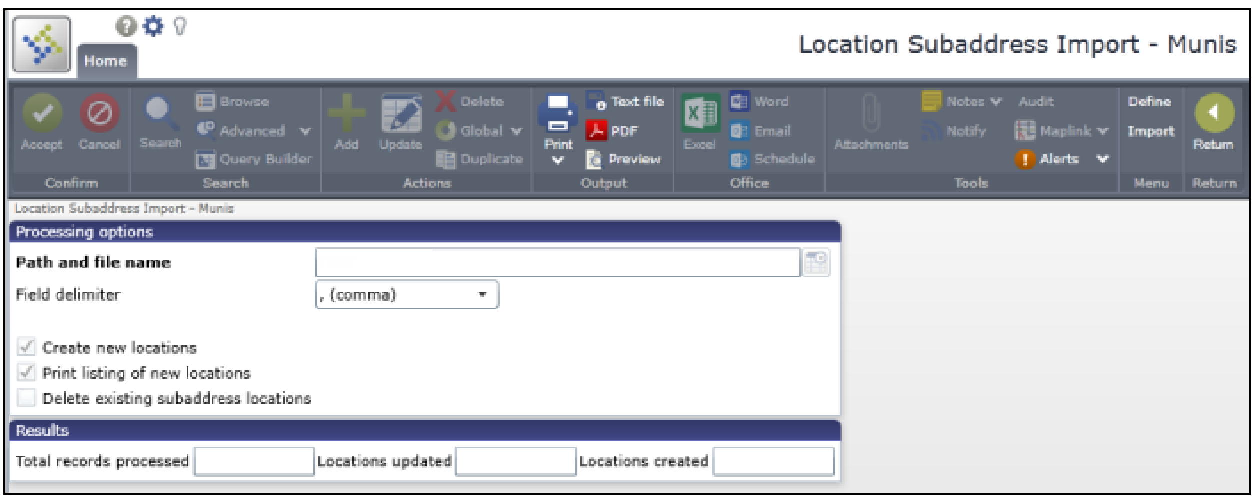
In the Menu group, click Test to test the Parcel ID or Alternate Parcel ID data. After the Parcel ID or Alternate Parcel ID is entered, click the Accept button to test the hyperlink.



If the test is successful, the URL of the website opens for that Parcel ID or Alternate Parcel ID and the Hyperlink Templates program displays a confirmation message.

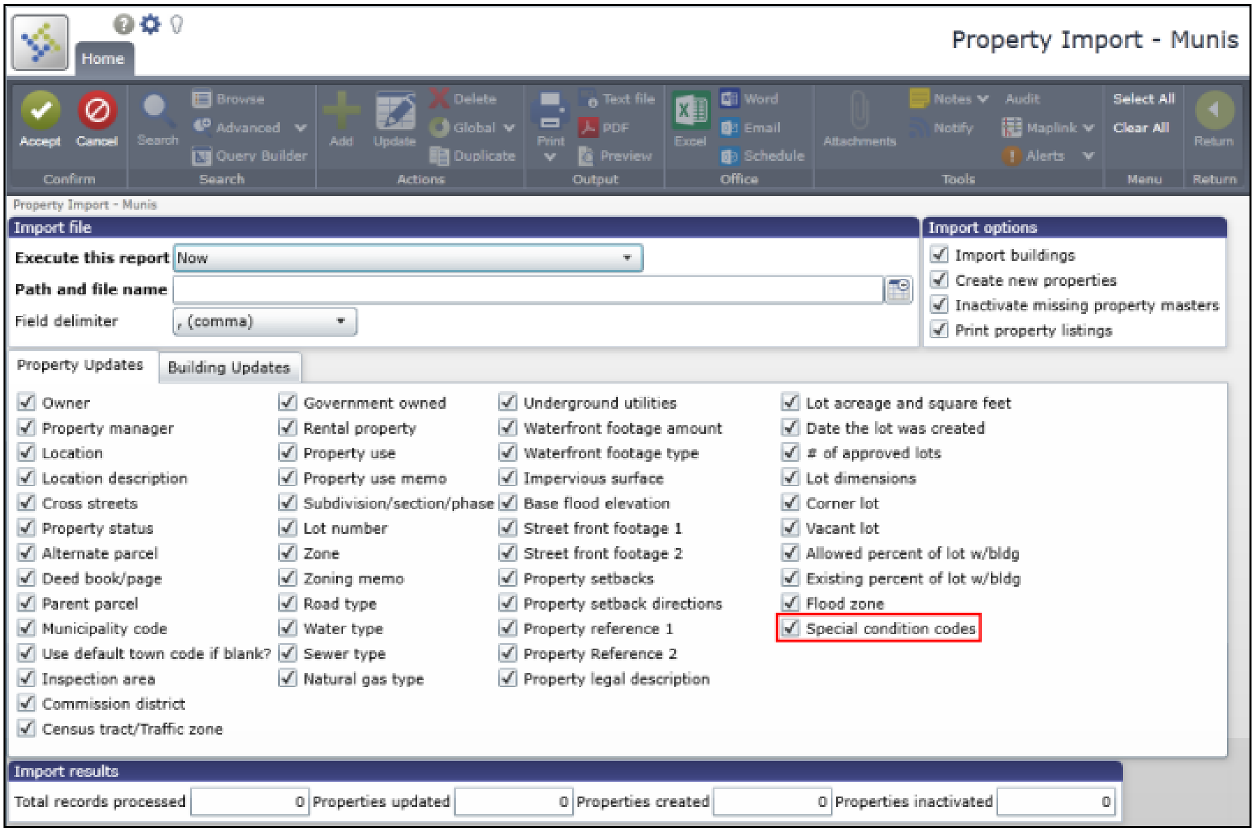
Location Subaddress Import

The Location Subaddress Import program creates new subaddress locations from a delimited file. This program is used by new client sites to import subaddress information. The program is not located within the Munis programs menu and must be run by a System Administrator. Note: Primary locations should be imported using the Standard Property Import program.



Property Import

When the Special Condition Codes check box is selected, the import includes up to five special condition codes with start and end dates that can be linked to the property and property owner. The special condition codes must exist in Special Condition Codes prior to processing the import file. The imported special condition codes display on the Special Conditions/Notes screen accessed through the Property Master program.

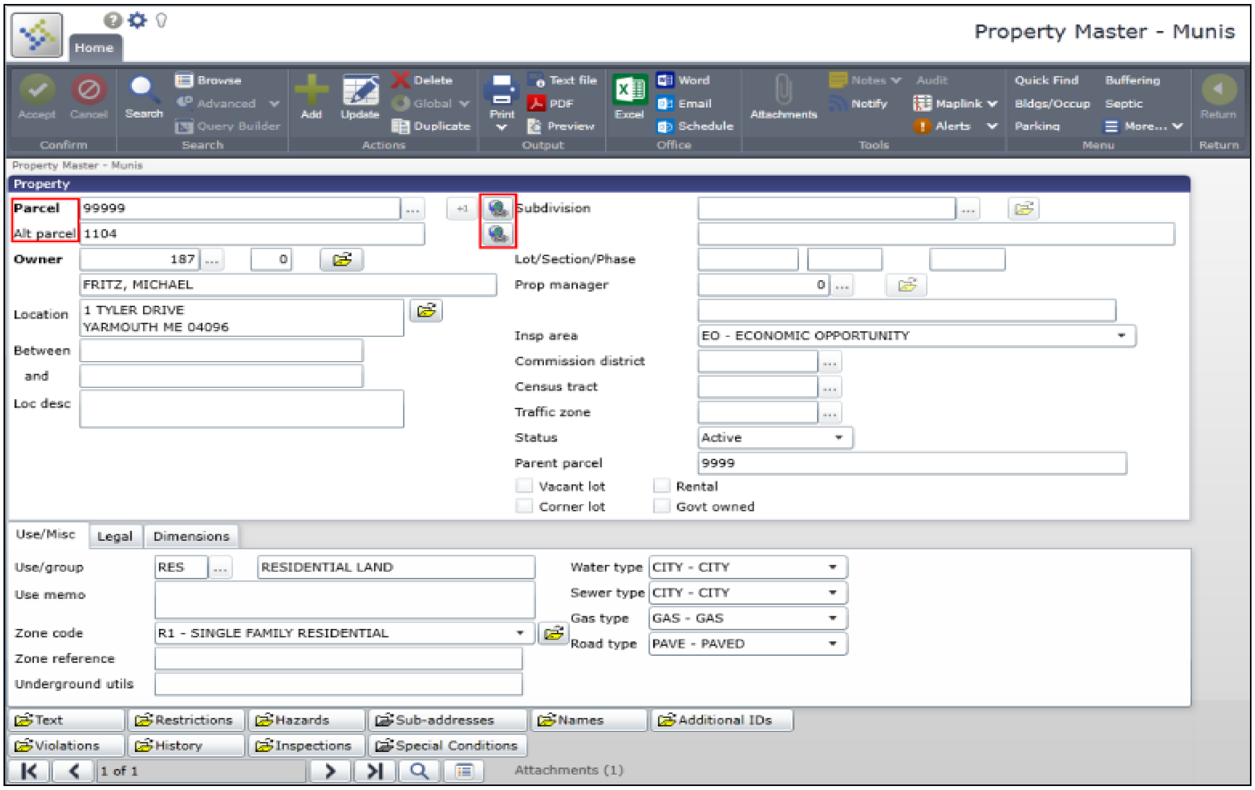


The Property Import program allows up to ten property owners and ten role codes to match the property owners in the import file. The imported owner names and role codes display in the Property Names screen of Property Master.

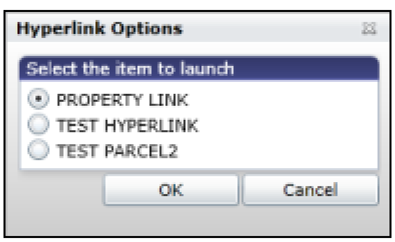
The Standard Property Import includes the primary location ZIP Code™, including the four-digit +4 ZIP Codes, and the property's legal description.

Property Master

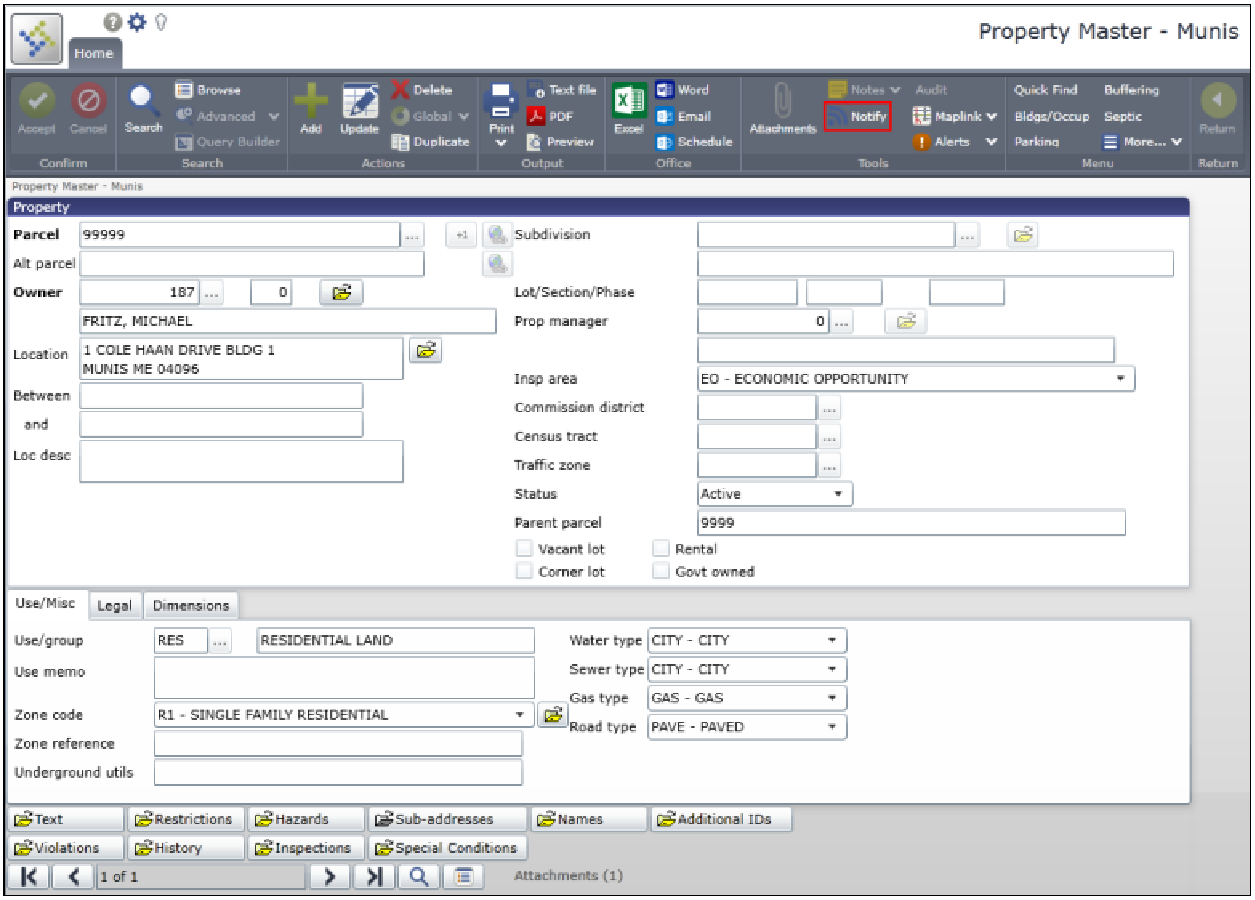
When you click the Hyperlink buttons related to the Parcel or Alternate Parcel fields in the Property Master program, the program displays the Hyperlink Options dialog box.



Select an option on the Hyperlink Options dialog box and the Property Master program inserts the Parcel ID or Alternate Parcel ID into the website address and launches that website.

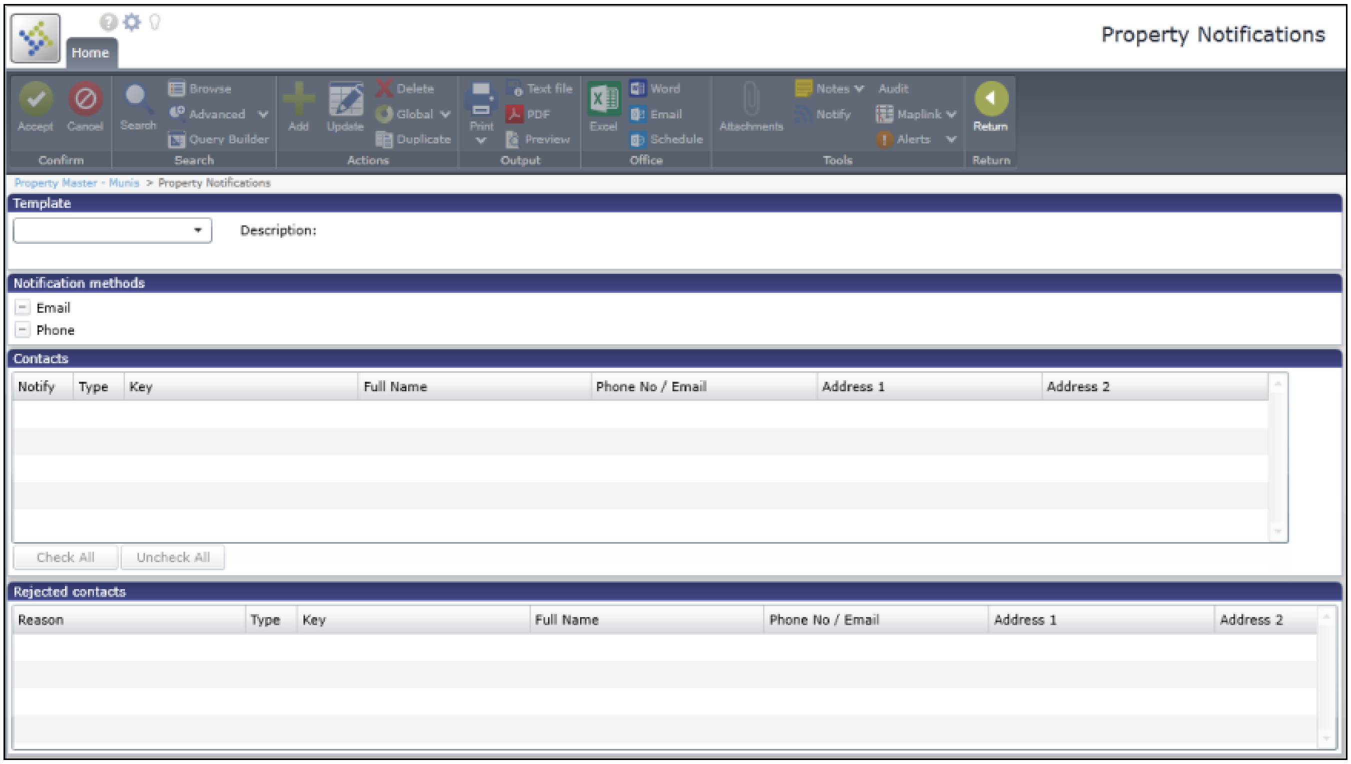


The Property Master program is integrated with Tyler Notify.



When you click the Notify button in the Tools group on the ribbon, the Notification Recipients screen displays where you can select the type of contact for the notification: Property Owner, Property Manager, or Property Names.

The Property Notifications screen provides a predefined template and the notification methods to send the message. If the customer record has a telephone number and an email address, select the Email and Phone check boxes and the customer will receive the notification message by email and by telephone.

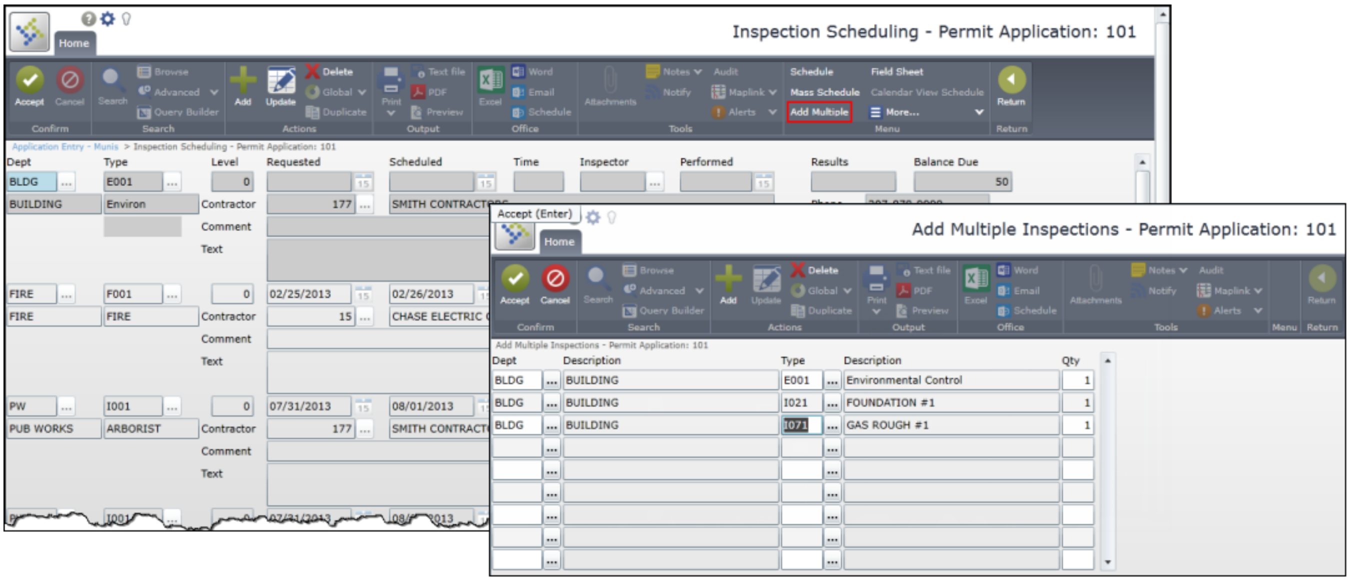


Permits and Code Enforcement

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

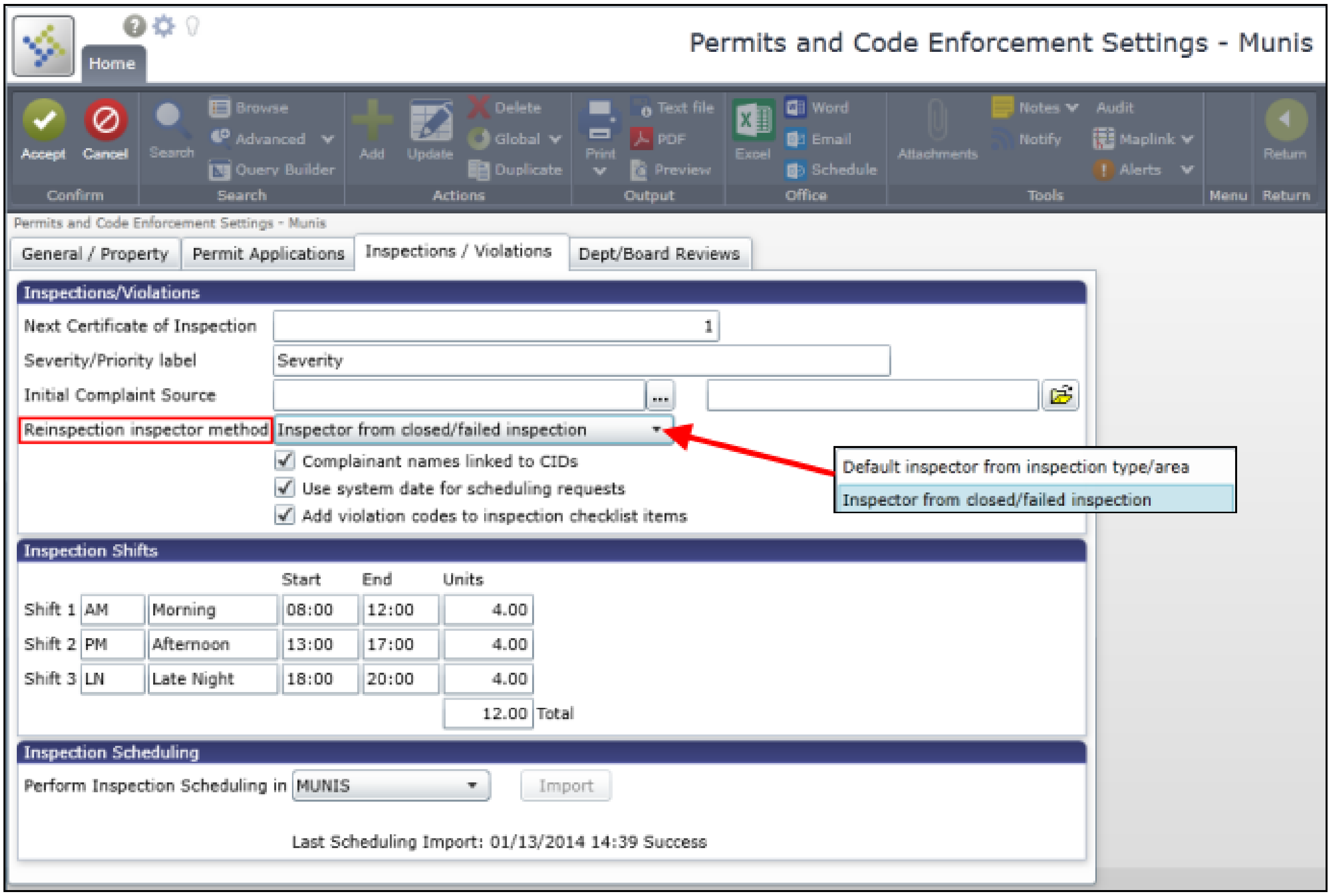
Inspection Scheduling

When you click the Add Multiple button, the program allows you to enter multiple inspections on the Scheduling screen. This screen is available when you access Inspection Scheduling through the Inspections folder button in Application Entry, Complaint/Violation Entry, or Property Master, and the Inspections option in the Menu group in Business Accounts.



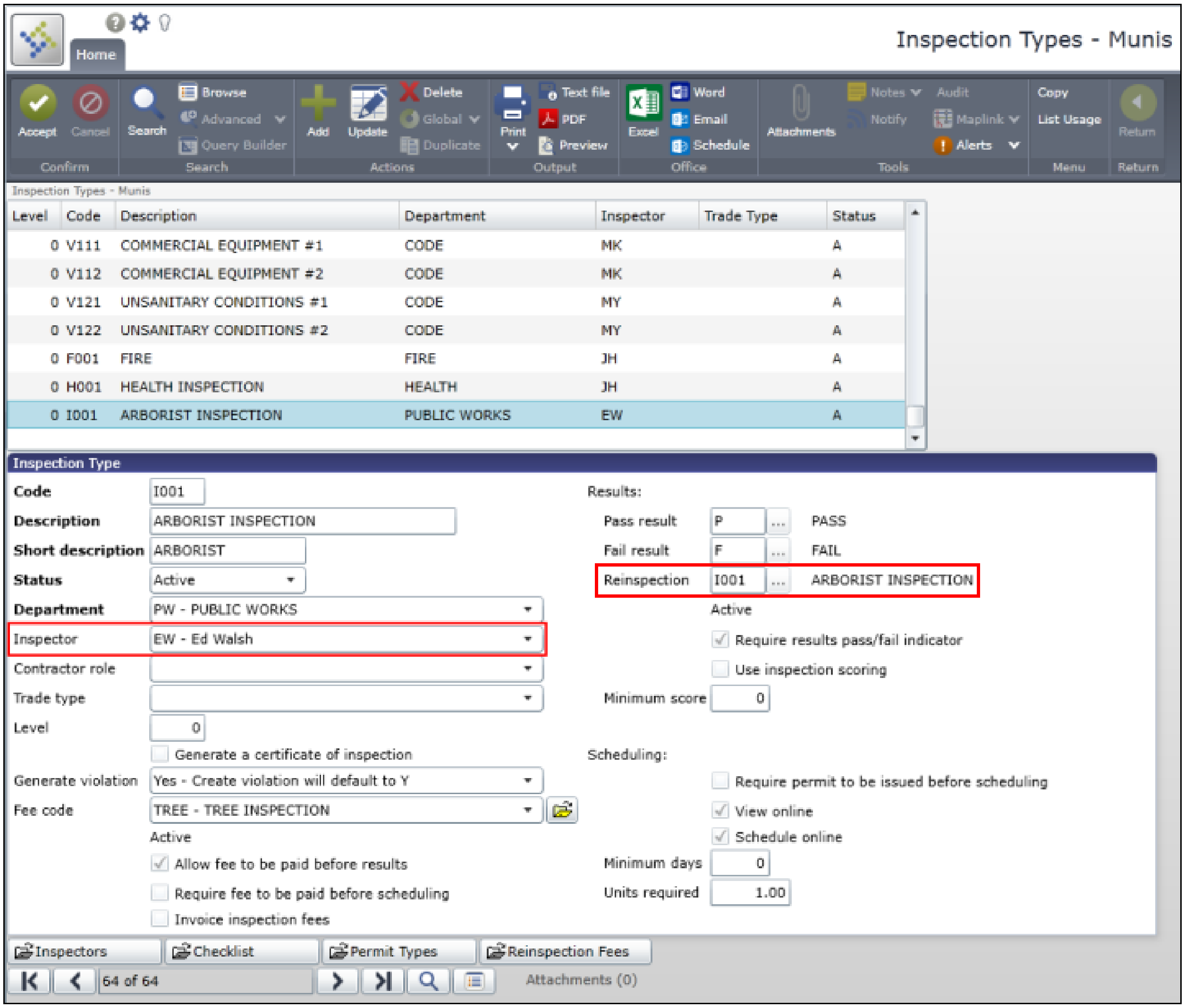
Permit and Code Enforcement Settings

The Reinspection Inspector Method list on the Inspections/Violation tab includes the following options: Default Inspector from Inspection Type/Area and Inspector from Closed/Failed Inspection.

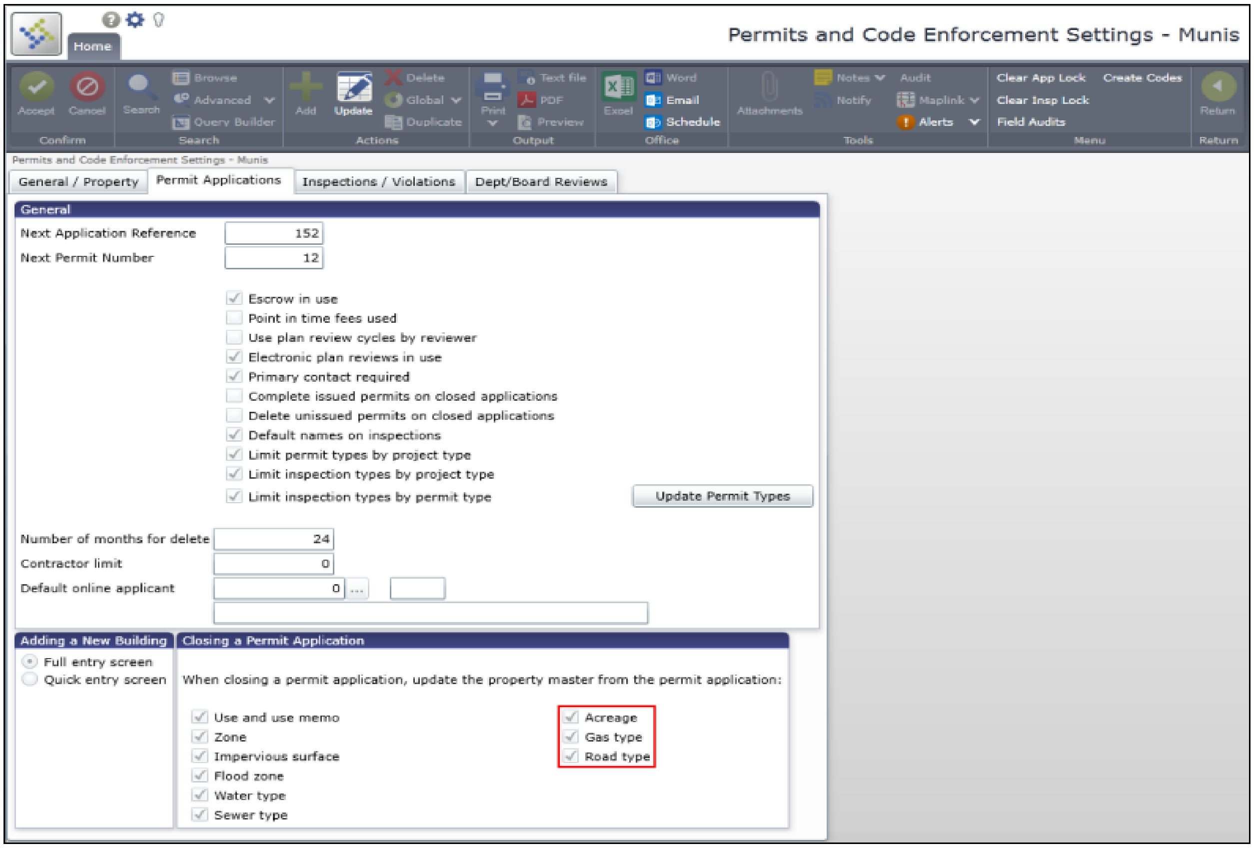


The Inspector from Closed/Failed Inspection option uses the inspector on the record at the time the inspection closes.

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



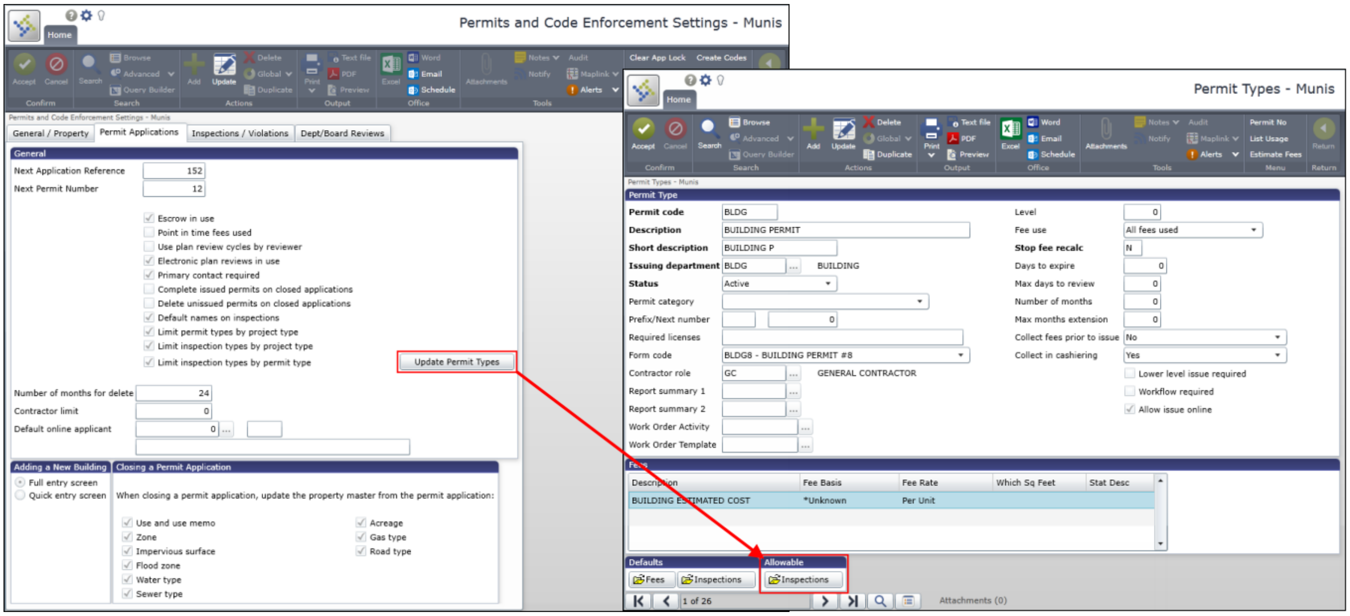
The Acreage, Gas Type, and Road Type check boxes are available on the Permit Applications tab. When selected, these check boxes update the specified data for records in the Property Master program when you close an application.



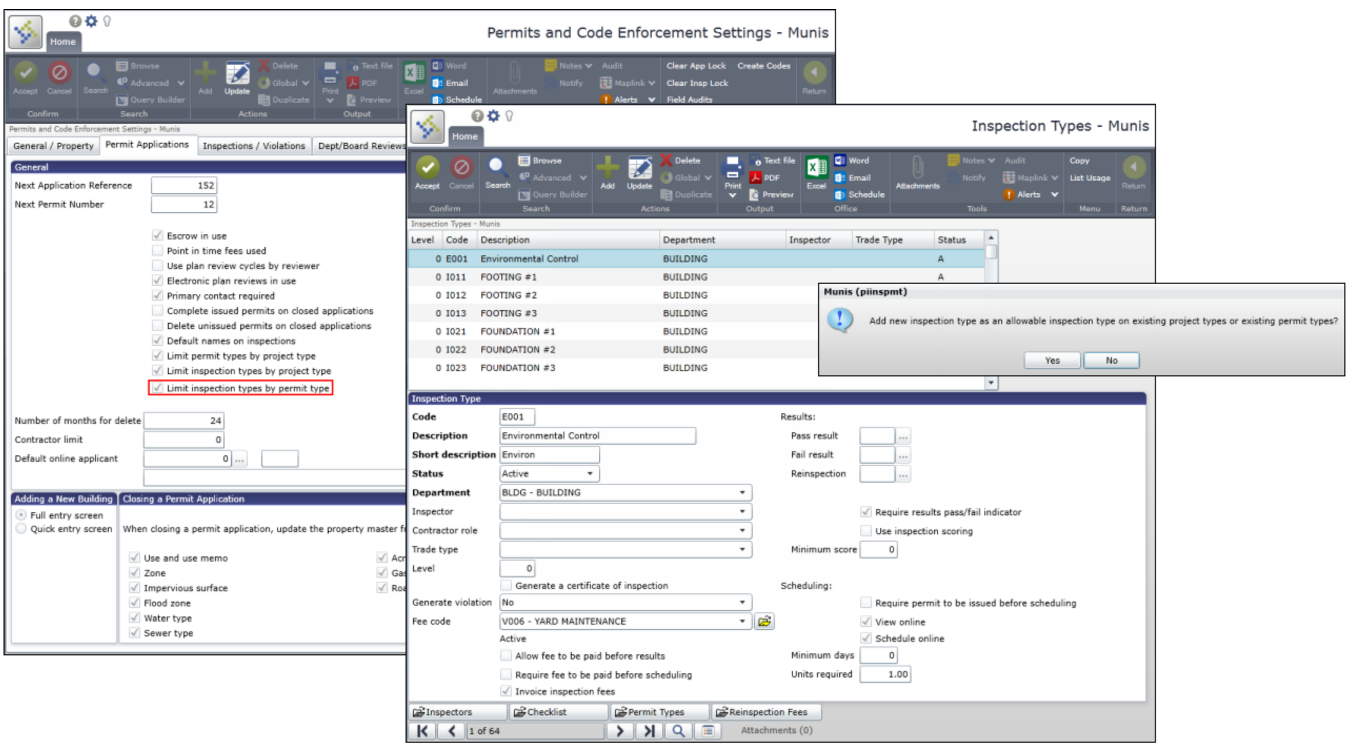
When the permit application closes and the Project Type category is Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal, the following updates occur:

- The Impervious Surface option updates when the project category type is Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal.
- The Existing and Proposed Use, Flood Zone, and Memo options update when the project category type is Construction, Demolition, Planning/Zoning, Relocation, or Tank Removal.
- The Water Type and Sewer Type options update when the project type category is Construction or Planning/Zoning.
- The Acreage, Gas Type, and Road Type options update when the project type category is Planning/Zoning.

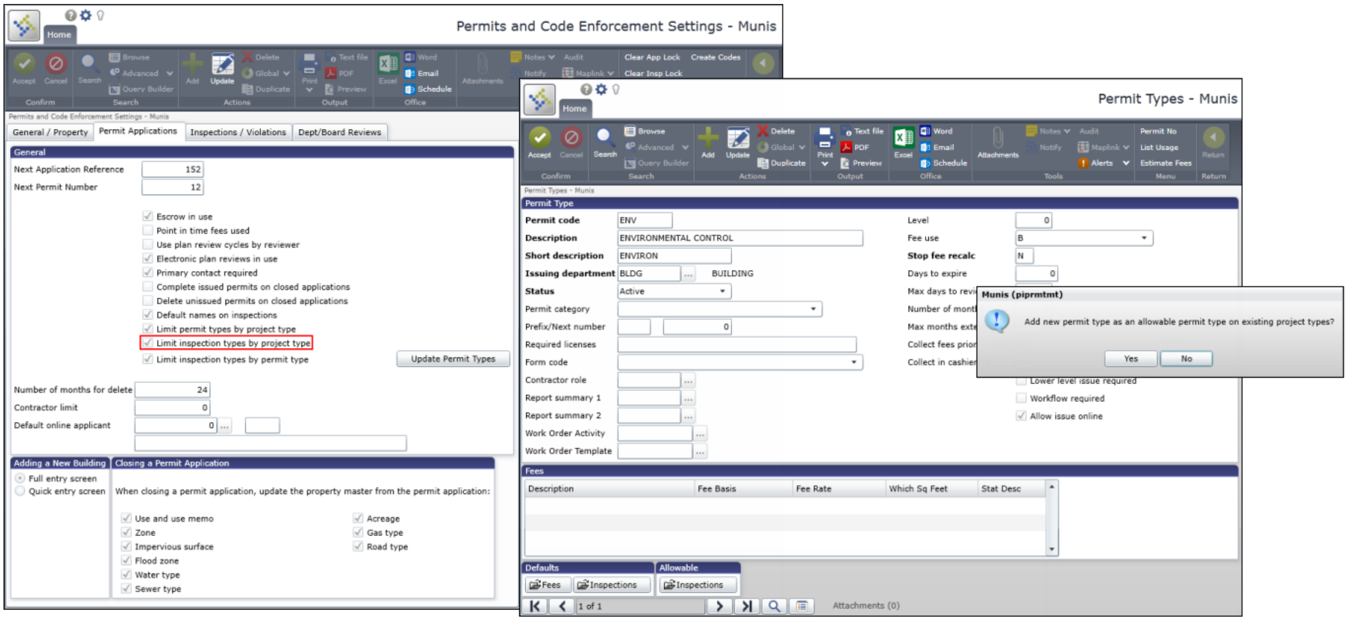
The Update Permit Types button on the Permit Applications tab creates inspection types in the Allowable group in Permit Types by copying the inspection types in the Defaults group.



When the Limit Inspections by Permit Type check box is selected and you create a new inspection type, the Inspection Type program displays a confirmation message. If you click Yes, a new entry is made for each selected permit type in the allowable inspection type list.

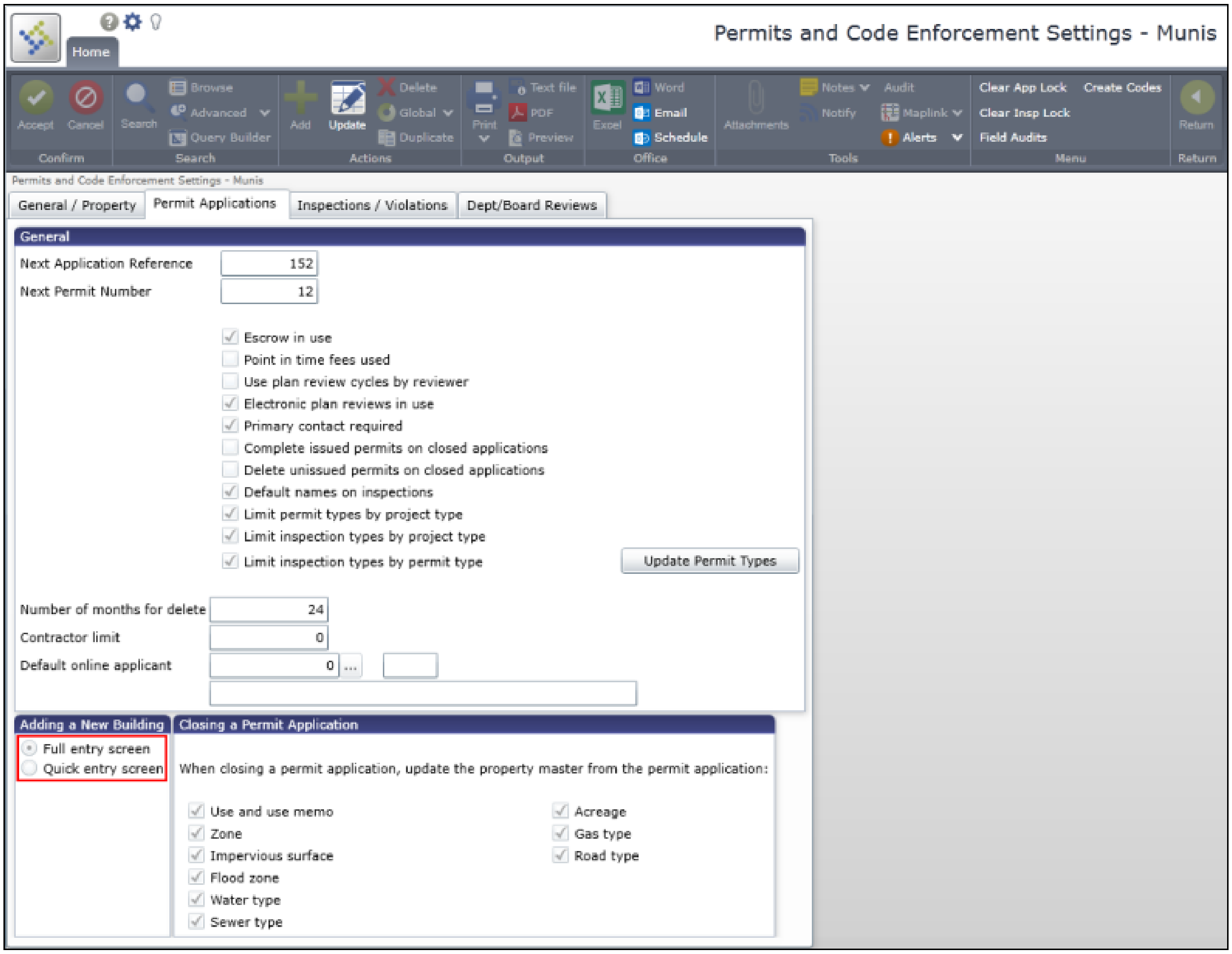


When the Limit Permit Types by Project Type check box is selected and you click the Update Permit Types button, the Project Type program includes Permits in the Allowable group based on the existing permit type in the Defaults group. When you add a new permit type, the program displays a confirmation message. Click Yes to accept the permit type.



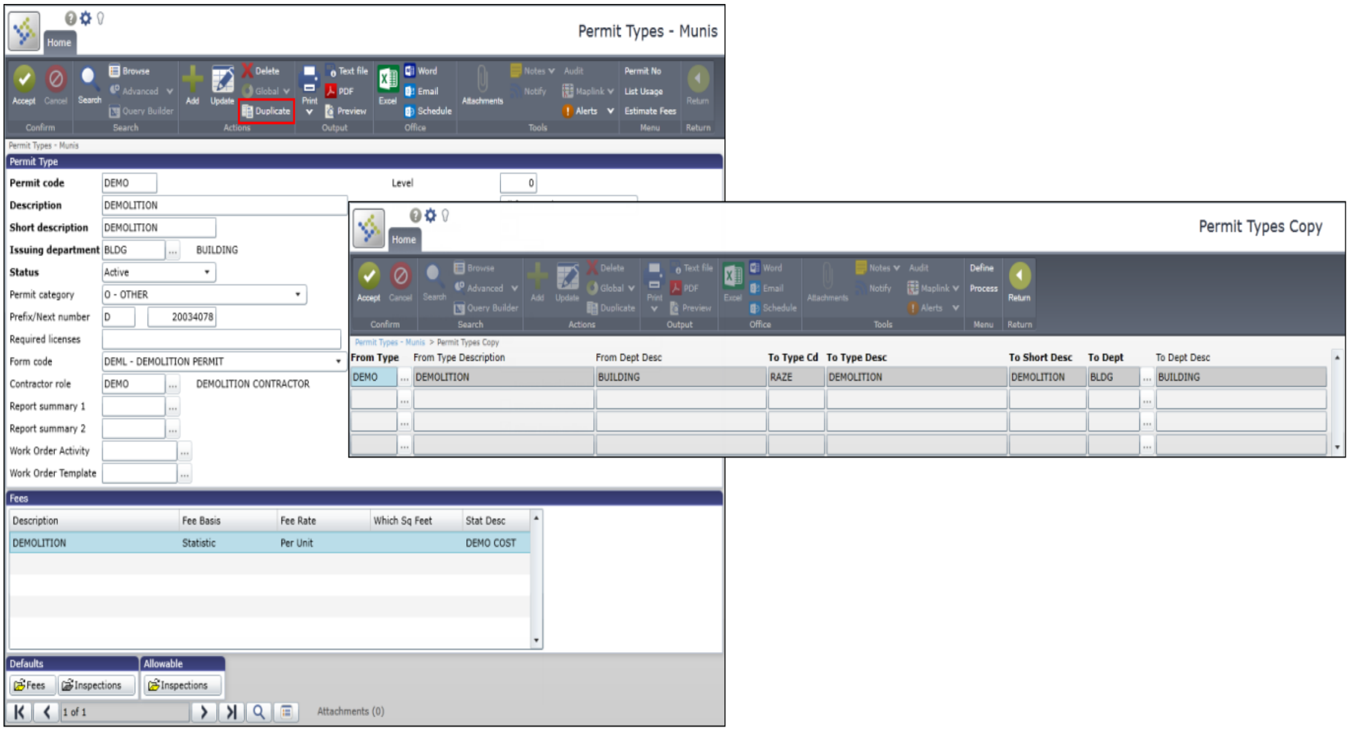
When you use allowable inspection types, the main screen of Inspection Entry and the Add Multiple screen (accessible through the Inspection Scheduling option) limit the inspection types to only the allowable inspection types for the permit type. If the inspection is not linked to a permit application,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

When you select the Full Entry Screen option under Adding a New Building on the Permit Applications tab, the Application Entry program displays the full Application Construction screen when you click Detail for an application with a construction permit type. If you select Quick Entry Screen, the Application Entry program provides a portion of fields on the Application Construction screen when you click Detail for a construction permit type.



Permit Types

The Permit Types Copy screen allows you to enter multiple lines of From Permit Type Codes, To Permit Type Codes, To Permit Type Descriptions, To Permit Type Short Descriptions, and To Departments. In addition to copying the master record, the Permit Types Copy screen also retains the default fees, items/fixtures, default inspection types, and allowable inspection types from the master record.

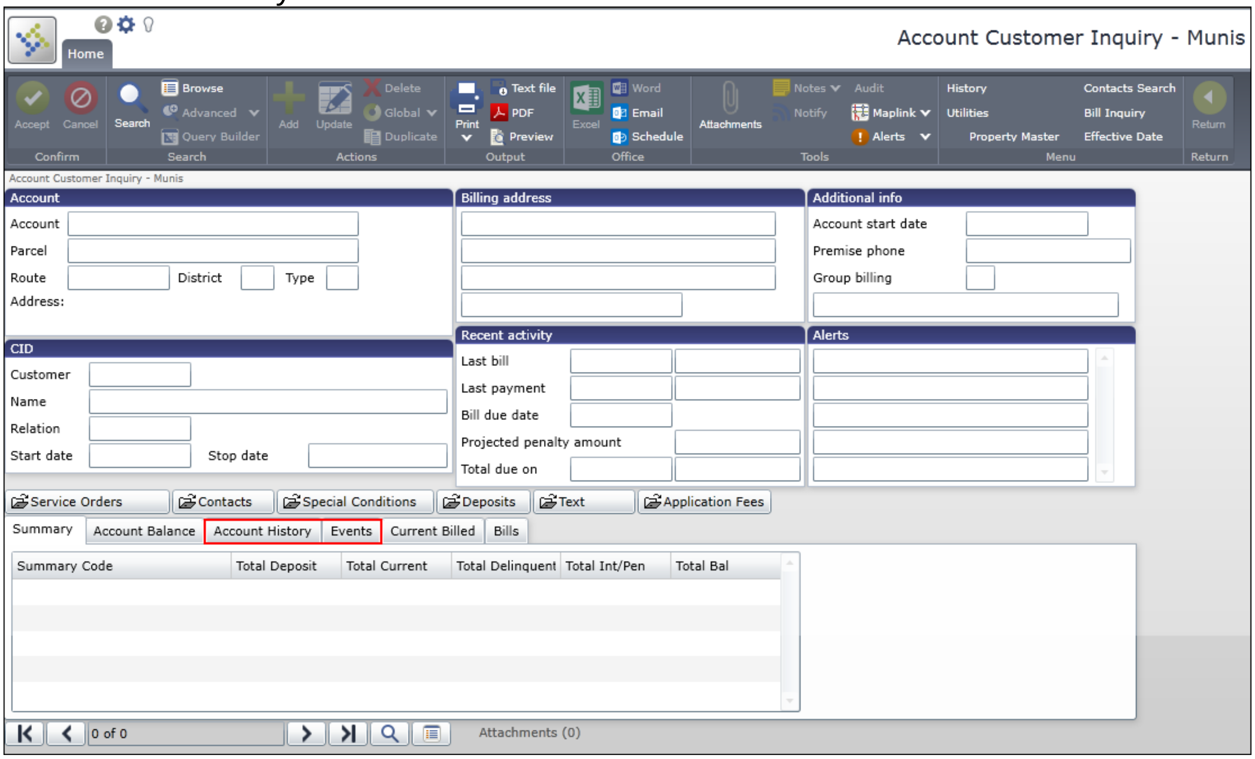


Utility Billing - CIS

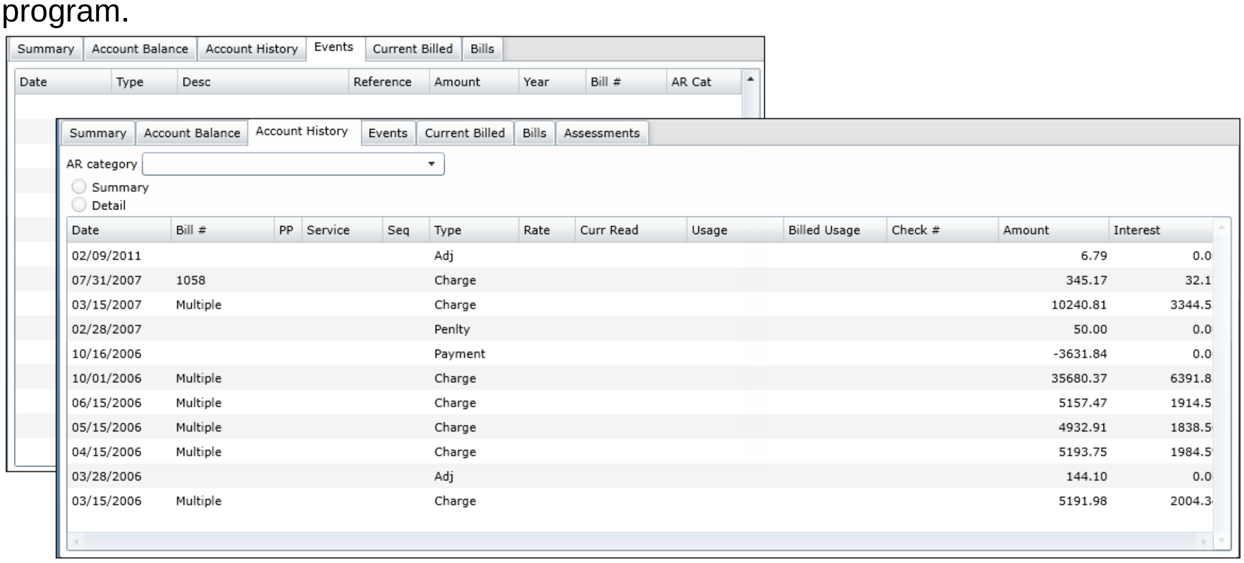
The following changes apply to Munis Utility Billing – CIS programs.

Account Customer Inquiry

The Account History and Events tabs are available.

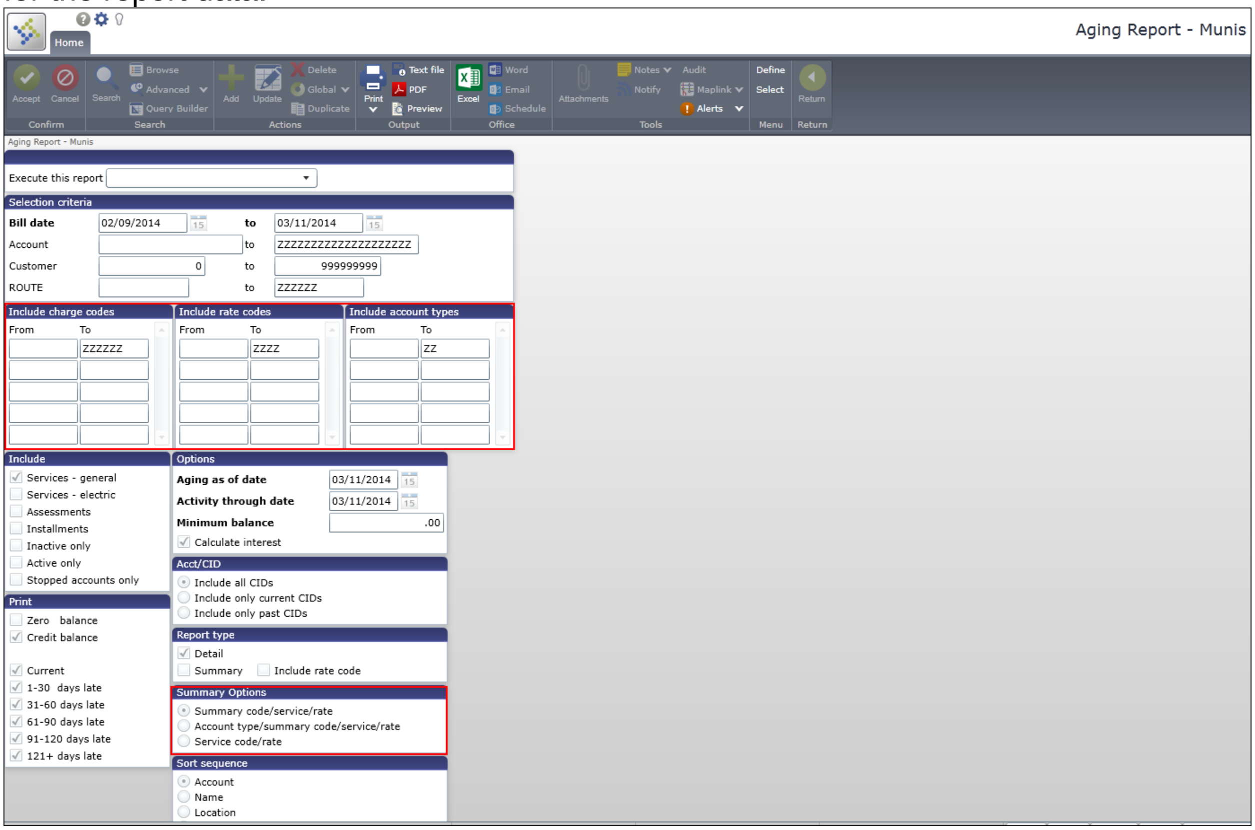


The Events tab displays event history associated with the account/CID and offers filtering capabilities. The Account History tab provides summary and detail transaction data, viewable by AR category. The account history information is also available using the Account History program.



Aging Report

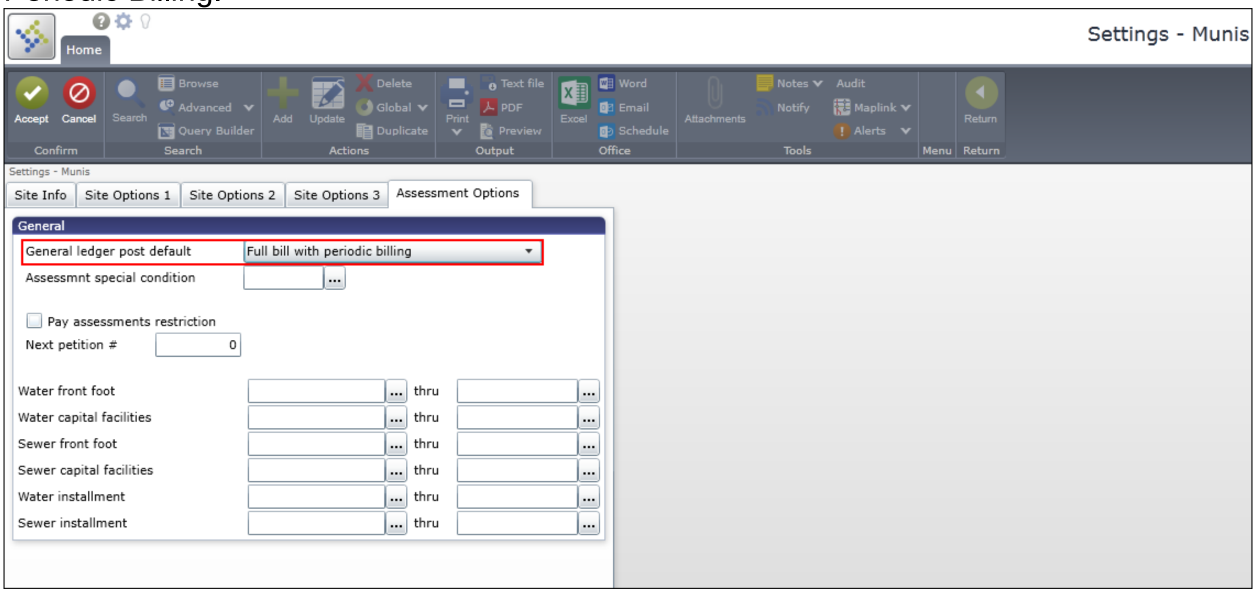
The Include Charge Codes, Include Rate Codes, and Include Account Types groups define up to five ranges of record sets for each category. These ranges provide expanded search criteria for the report data.



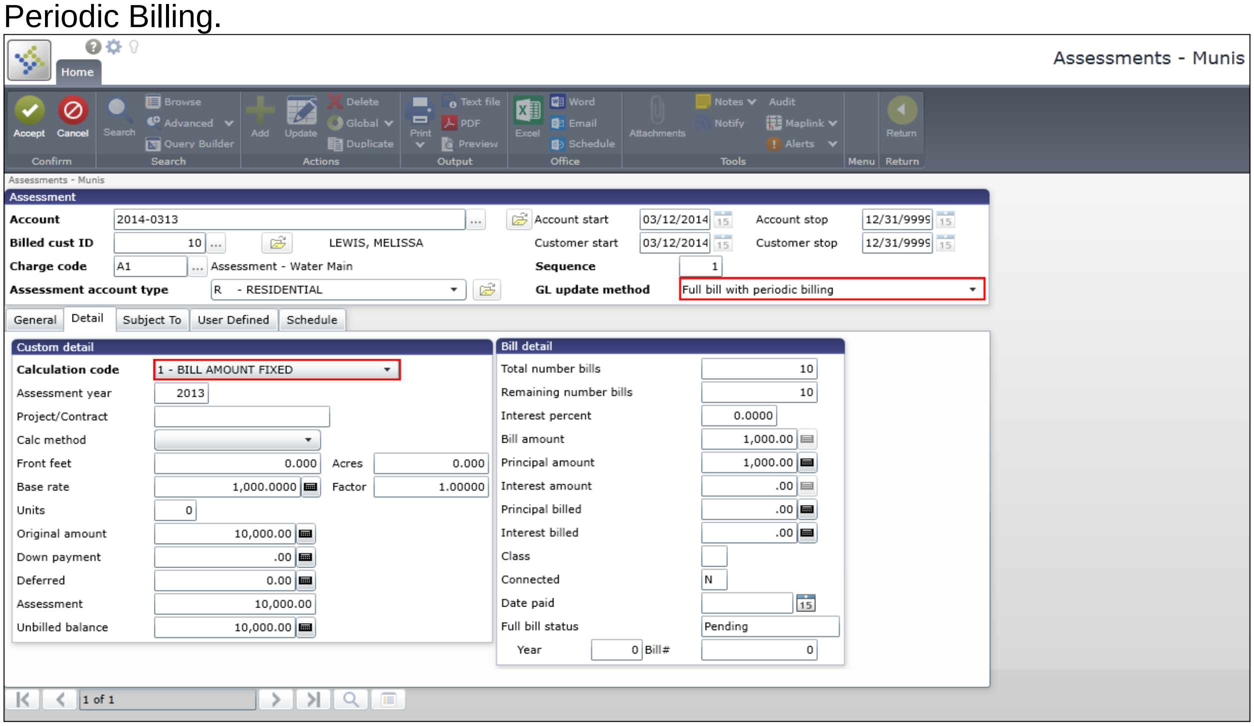
If you select the Summary check box in the Report Type group, the Summary Options group is accessible. Select one of these options to specify how the report summarizes amounts.

Assessments

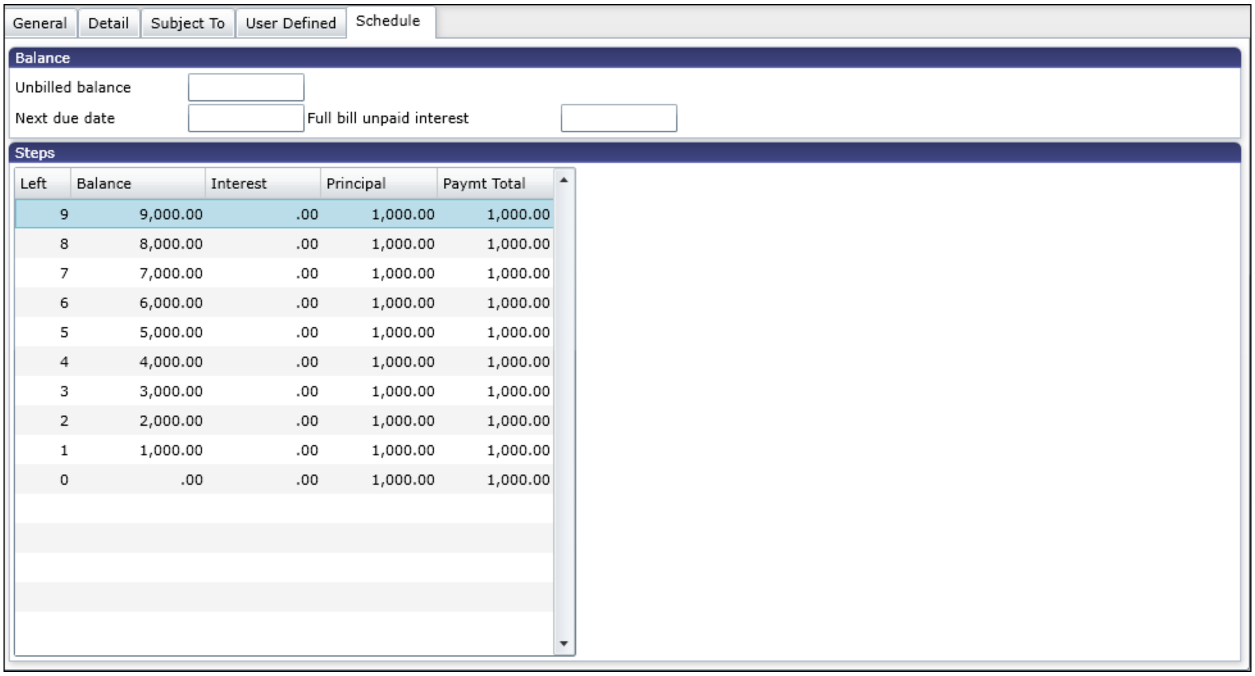
The Assessments program allows the use of calc code 1 - Bill Amount Fixed when the GL Update Method is Full Bill with Periodic Billing. To use this feature, the General Ledger Post Default option on the Assessments tab in the Settings program must be set to Full Bill with Periodic Billing.



You must also have defined a full bill process, including a bill run code for full assessment bills. When settings are complete, the Assessments program accepts a value of 1-Bill Amount Fixed from the Calculation Code list when the value of the GL Update Method list is Full Bill with Periodic Billing.



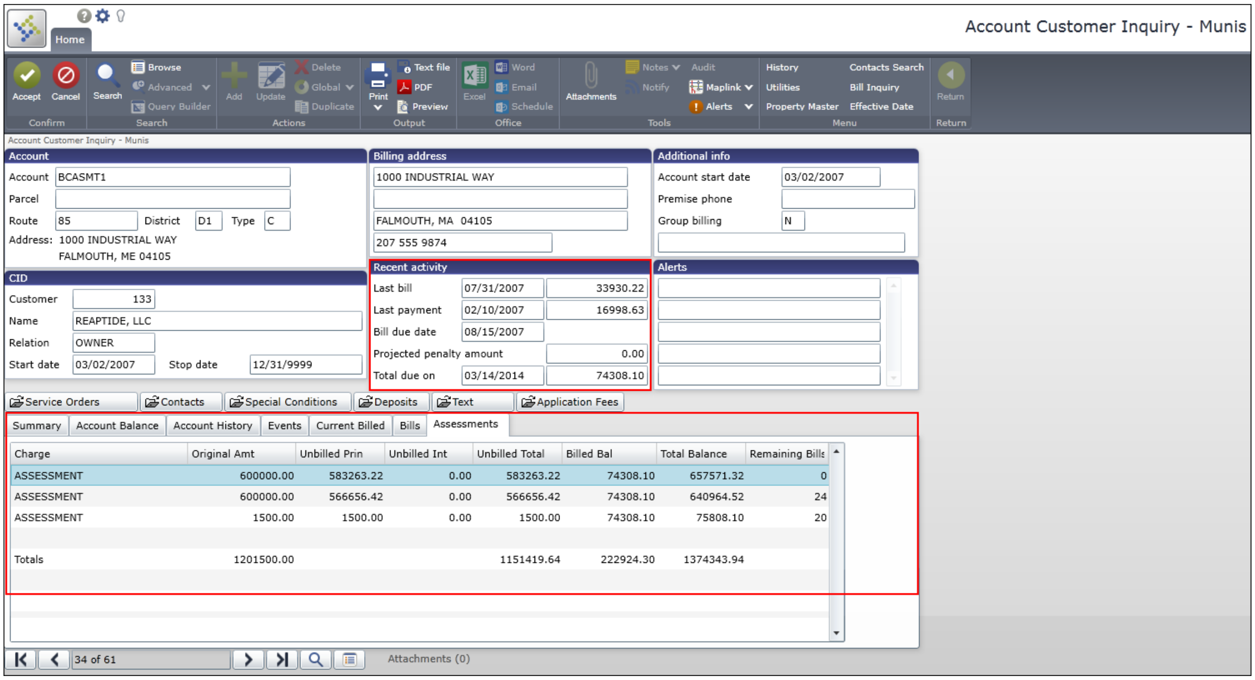
The Schedule tab determines the appropriate schedule for the full bill assessment.



Left	Balance	Interest	Principal	Paymt Total
9	9,000.00	.00	1,000.00	1,000.00
8	8,000.00	.00	1,000.00	1,000.00
7	7,000.00	.00	1,000.00	1,000.00
6	6,000.00	.00	1,000.00	1,000.00
5	5,000.00	.00	1,000.00	1,000.00
4	4,000.00	.00	1,000.00	1,000.00
3	3,000.00	.00	1,000.00	1,000.00
2	2,000.00	.00	1,000.00	1,000.00
1	1,000.00	.00	1,000.00	1,000.00
0	.00	.00	1,000.00	1,000.00

For bill runs that are specifically used to create full assessment bills, the Generate Charges program creates a full bill for the principal amount for an assessment with calculation code 1. The program calculates the appropriate principal and interest amount to be billed when the first and subsequent installment bills are created. If payments are made to a full bill prior to the first/next installment bill, the assessment unbilled balance and principal/interest billed amounts are updated.

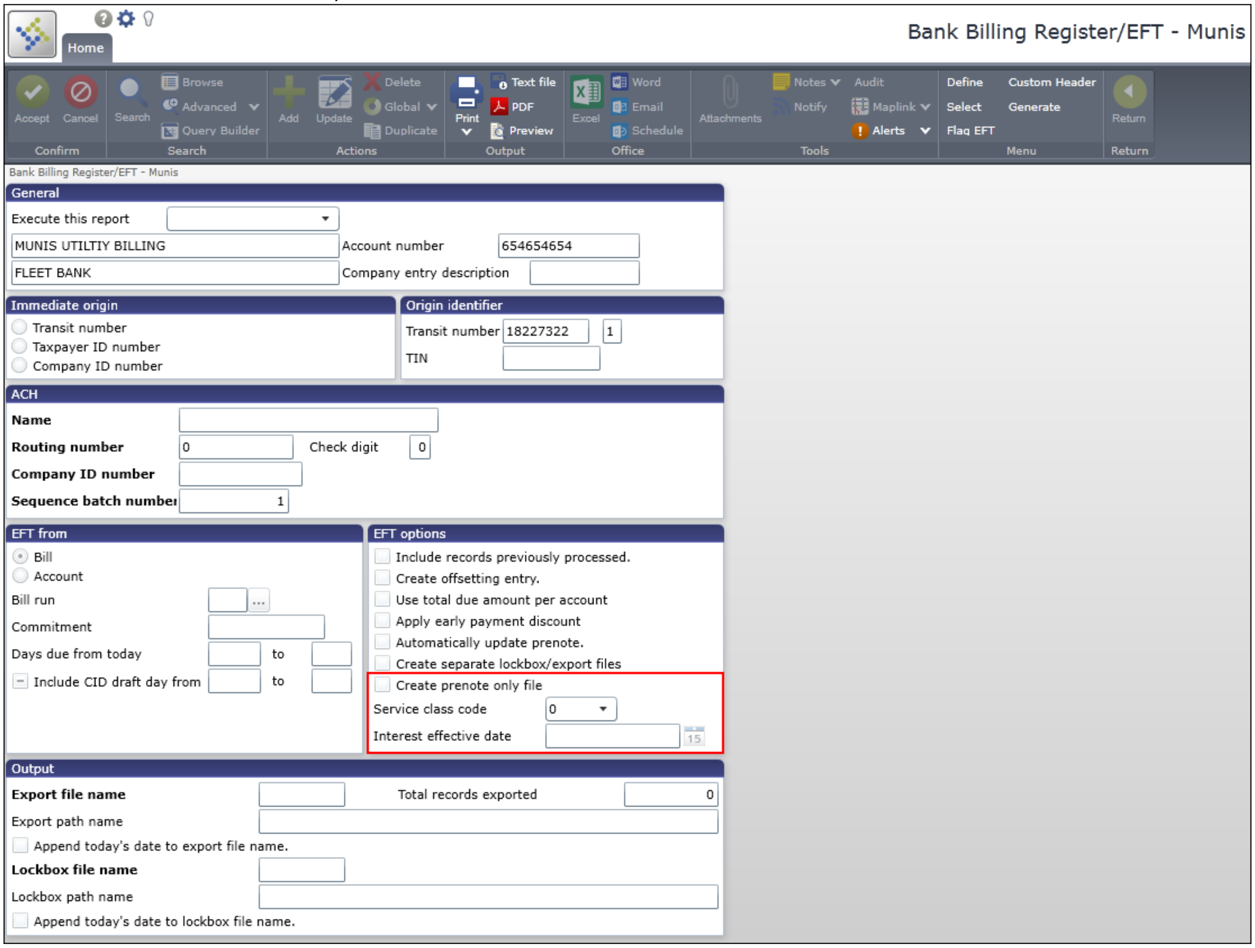
In Account Customer Inquiry, the program excludes the full bill balance from the Total Due Amount in the Recent Activity Group and from the Summary, Account Balance, and Bills tabs. The Assessments tab presents the original assessment amount, the total unbilled amount from the full bill, and the total amount due for any unpaid installment bills. The tab also lists all billed assessments with totals.



In Account History Inquiry/Report, the program excludes the full assessment bill from the unpaid balance amount on the Detail and Summary screens.

Bank Billing Register/EFT

The Bank Billing Register/EFT program includes the Create Prenote Only File check box, the Service Class Code list, and the Interest Effective Date box.



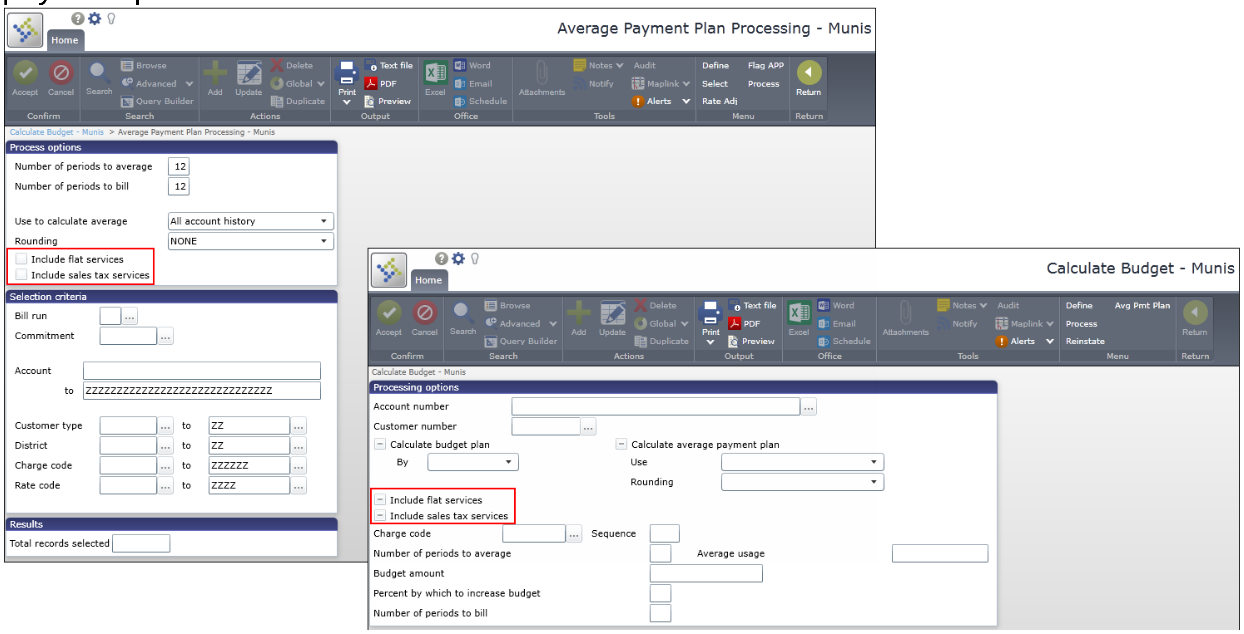
The Create Prenote Only File check box in the EFT Options group allows you to create an EFT prenote outside of the bill run process.

The Service Class Code list determines the service charge code (200 mixed debit and credits or 225 debits only) that is supplied in the output file. If you select the Create Offsetting Entry check box, this list is not accessible.

The Interest Effective Date specifies a date for calculating interest for past due bills. When you enter a value in the Interest Effective Date box, the program uses this date when calculating the interest for a bill and adds the amount to the EFT. If this box is blank, no interest is calculated for the transaction.

Calculate Budget, Average Payment Plan

The Include Flat Services and Include Sales Tax Services check boxes cause budget and payment plan calculations to include flat and sales tax services.



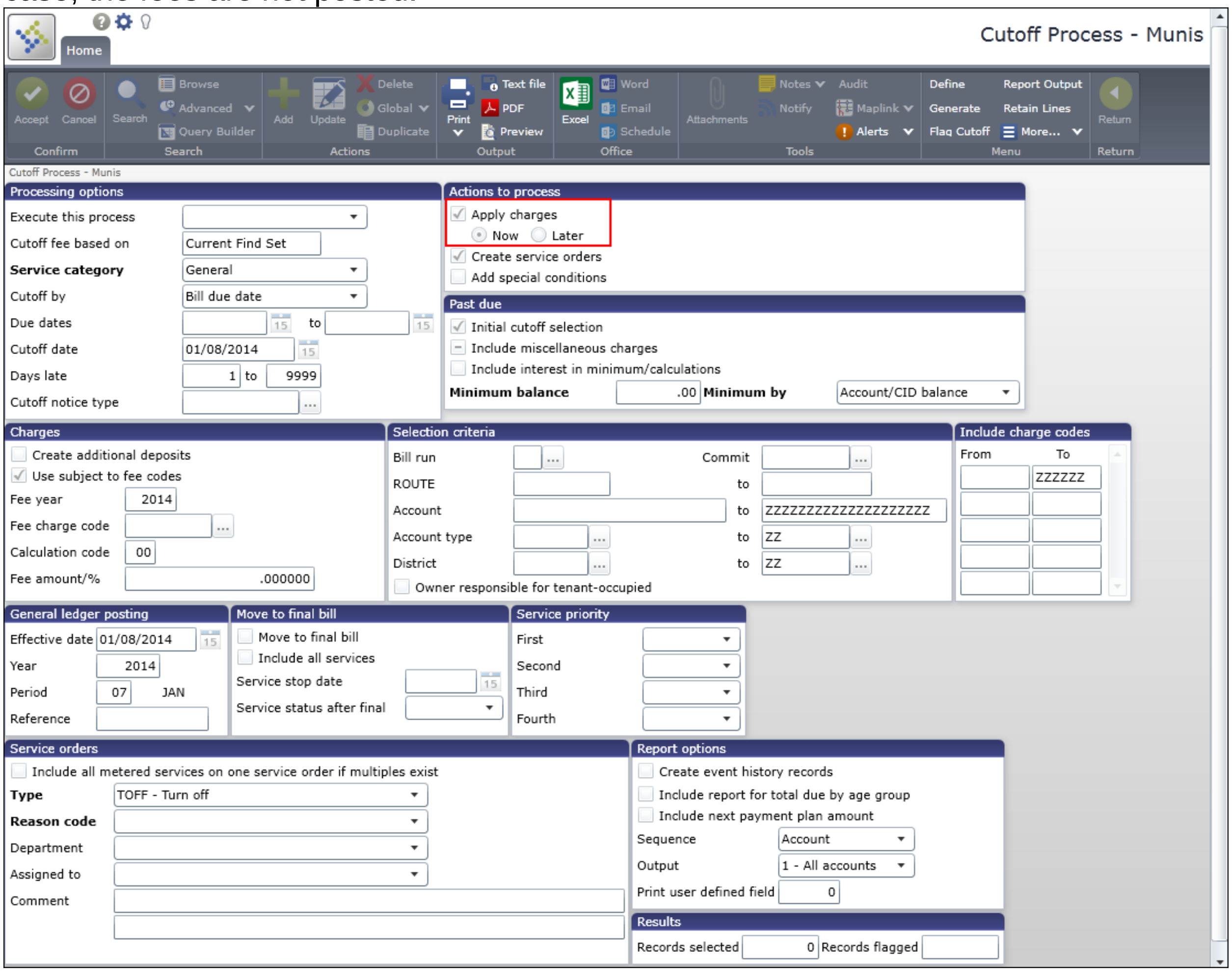
In the Calculate Budget program, these check boxes are used for initial enrollment into budget/payment plans. They are only accessible when the value of the Process By list in the Settings program is Account. In the Average Payment Plan Processing program, these fields are used with the annual recalculation/amortization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

When you select the Include Flat Services check box, the program includes all regular flat services containing calculation code 69 and sets the budget amount to equal the base/flat amount from the current rate. For the Include Sales Tax Services check box, after budget amounts have been calculated for all other services, the program determines if any sales tax services exist on the account. If sales tax services exist, the program selects the budget amount from all dependency services associated with the sales tax charge code that are identified as being on a budget/payment plan and accumulates a total. The total budget amount is then used to calculate a sales tax budget amount using the applicable sales tax rate. All dependency services should also be enrolled in the budget/payment plan, as any that are not are excluded from the calculated sales tax budget amount.

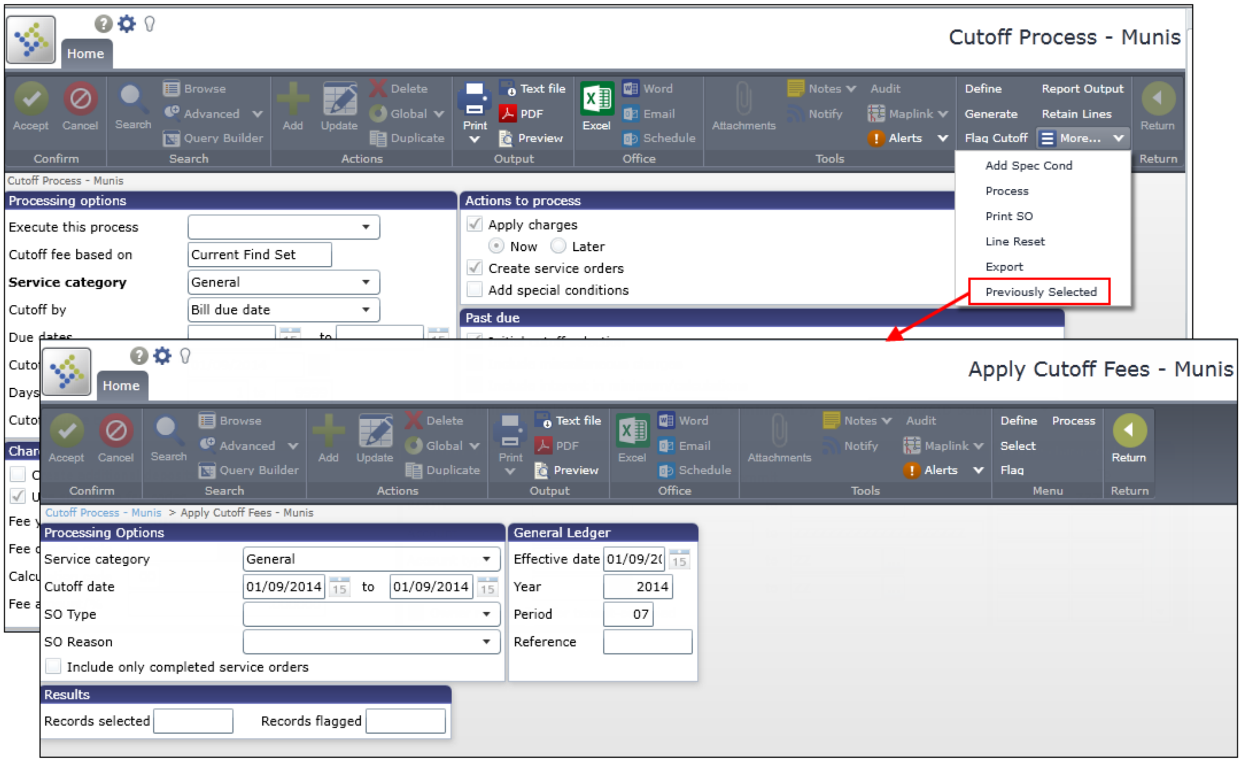
For Average Payment Plan Processing, these check boxes, if selected, direct the program to use the same functionality as described for the Calculate Budget process during the annual recalculation/amortization process.

Cutoff Process

In the Actions to Process group, the Apply Charges Now or Later option is available. When you select Later, you can apply fees to the account after a service has been completed. In this case, the fees are not posted.

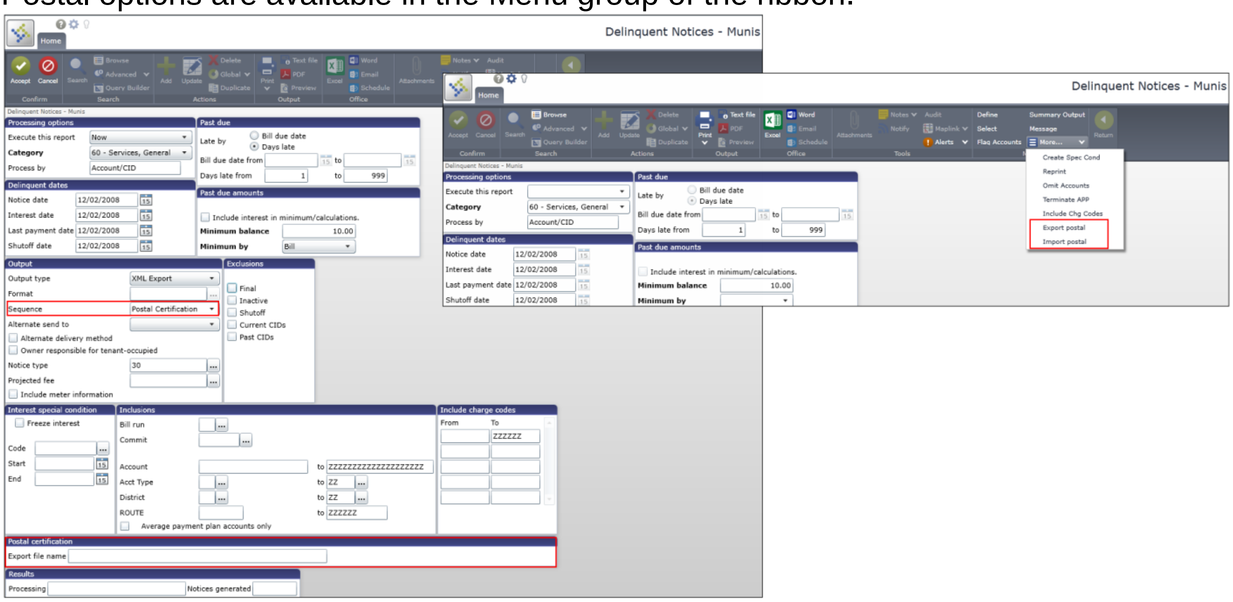


When you chose to apply charges later, use the Previously Selected option on the Menu group of the ribbon to process these charges.



Delinquent Notices

When the Process Postal Certification check box is selected in the Settings program, the program uses postal certification processing when importing and exporting files. In this case, the default value of the Sequence list is Postal Certification, and the Export Postal and Import Postal options are available in the Menu group of the ribbon.

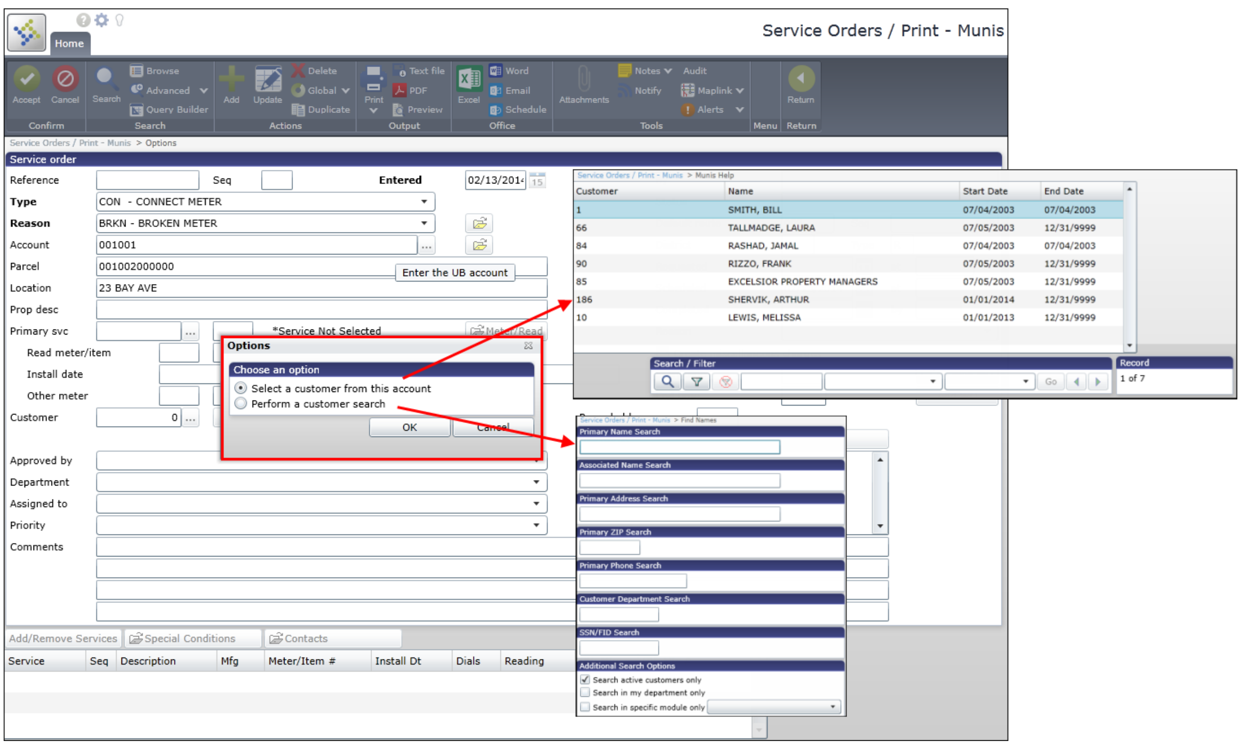


After the Select step is complete, click Export Postal to export a flat file to the spool directory. Once the file is stored on the spool directory, the program displays a query box that provides the option to send the file to your PC. When you click Yes, the program displays the file path. Update the file to include the output sequence order for the XML file. Once the file is updated, click Import Postal from the Menu group of the ribbon to import the updated file back into the Munis database. The program automatically resorts the bills.

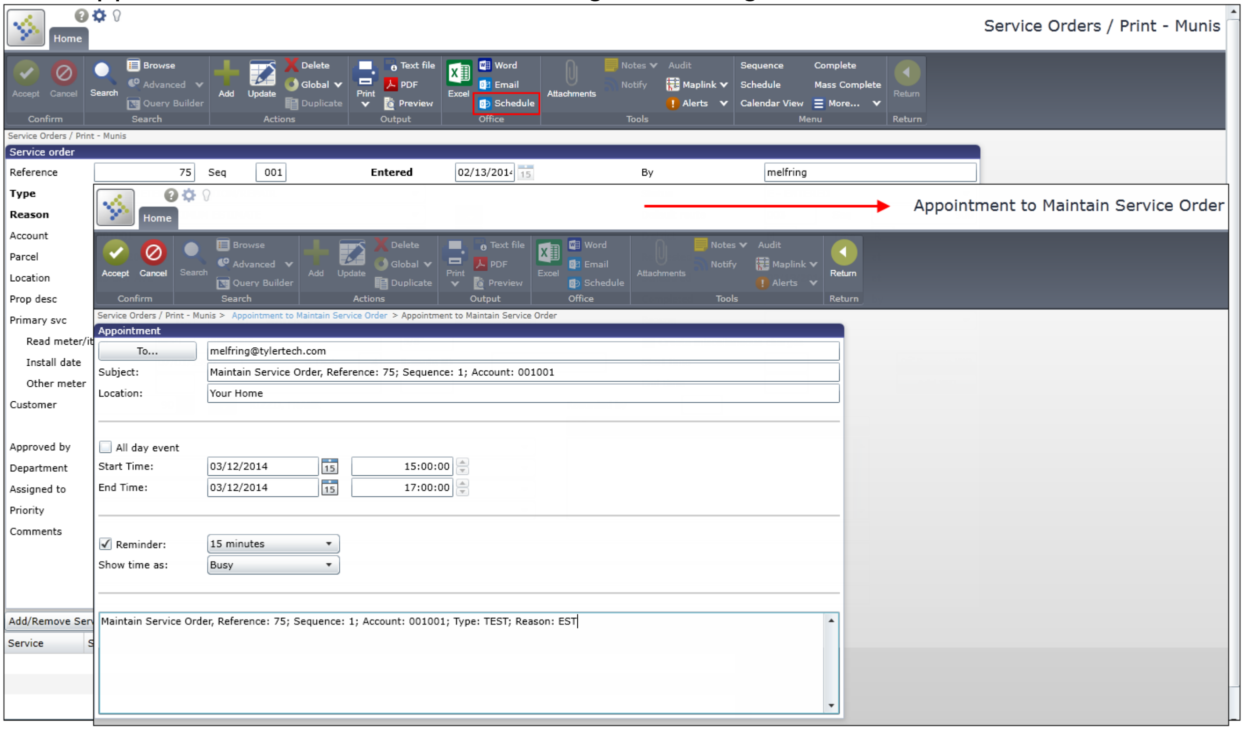
If you are using postal certification processing and you select an output option prior to updating the postal file, the program displays a reminder.

Service Order/Print

When you search for a service order using the account number and you do not enter a value in the Primary Svc box, when you click the field help button in the Customer box, the program displays an Options dialog box. Use the Select a Customer from this Account option to narrow the search results to only customers associated with the specified account, or select Perform a Customer Search option to display the Find Names customer search box, which you can use to find any Munis customer.



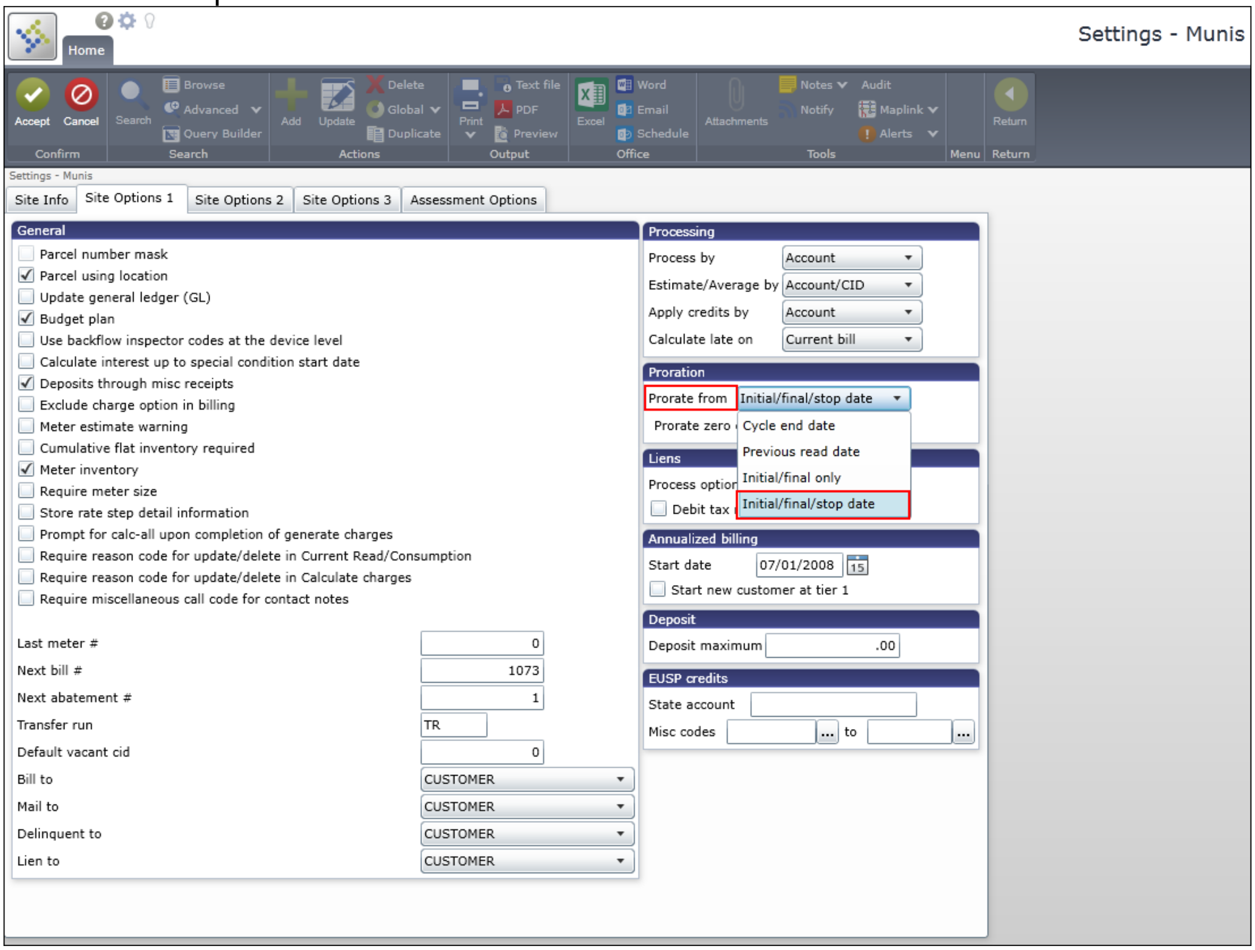
For service assignees with a valid email address, use the Schedule button in the ribbon to send appointment notifications to the assignees using email.



When you enter an email address on the Appointment to Maintain Service Order screen, the program verifies that the email address is valid. If you enter an email address that is not valid, you cannot continue.

Settings

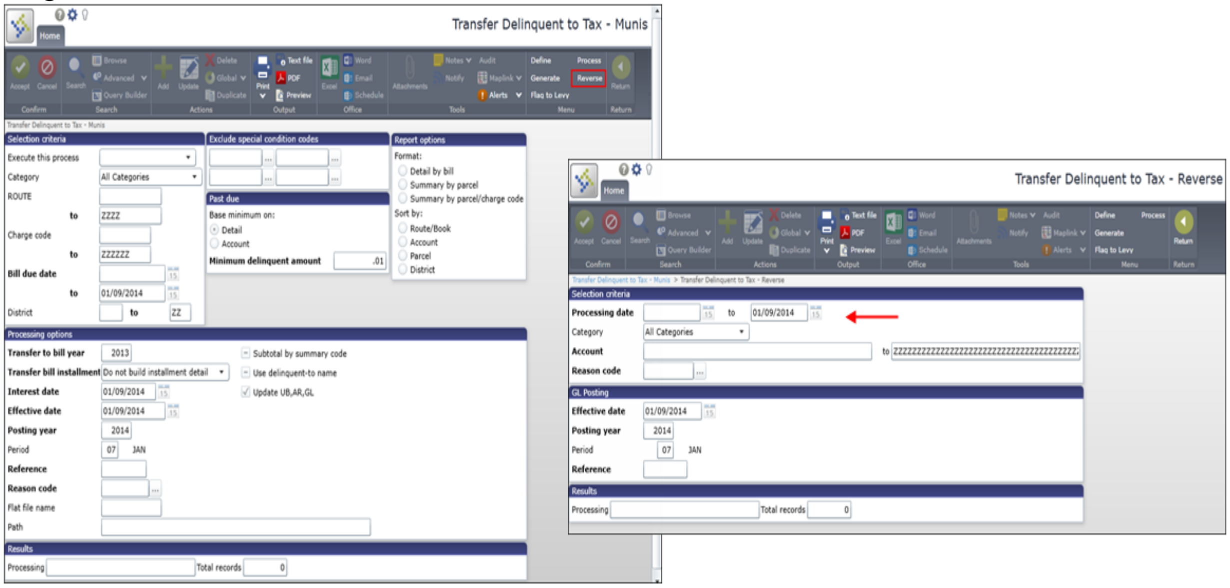
The Prorate From list on the Site Options 1 tab of the Settings program includes the Initial/Final/Stop Date.



This option accommodates flat charge proration by stop date for a regular (that is, nonfinal) bill cycle. When you select this option, charge calculations prorate flat services that have been stopped in the middle of a regular bill cycle.

Transfer Delinquent to Tax

The Transfer Delinquent to Tax program includes the Reverse option. When you select Reverse, the program displays the Reverse screen, where you can define the processing date range for which the bills were transferred to Munis Tax.

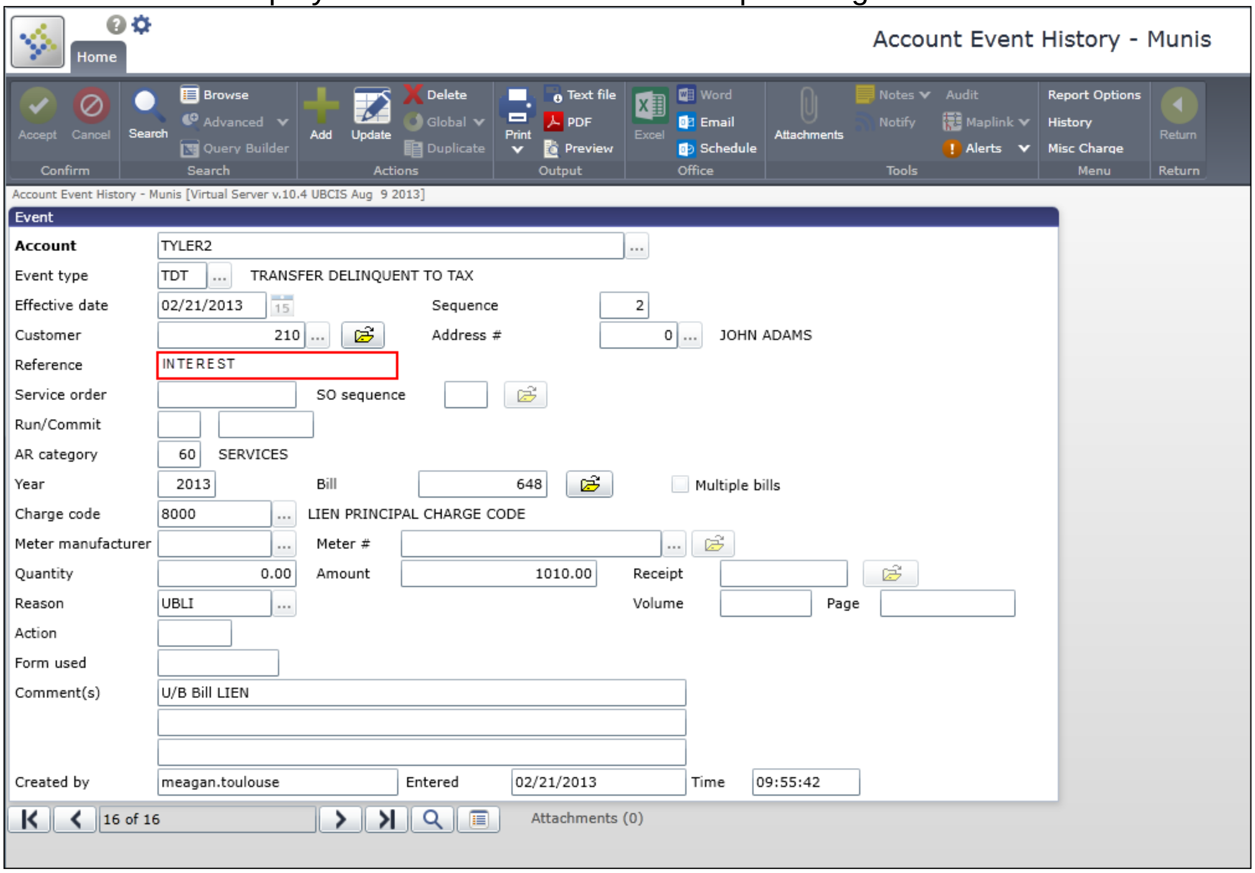


When you generate the reversal, use the Flag to Levy option to identify each account to which the reversal applies. When you click Process, the program completes the reversal.

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

Transfer Delinquent to Tax, Account Event History

The Transfer Delinquent to Tax program creates specific Account Event History records for interest amounts included in the process. The Account Event History browse screen provides the Charge Code, Amount, Reference, Bill Year, Bill Category, and Bill Number values. The Reference field displays "Interest" for those records providing the interest amounts.

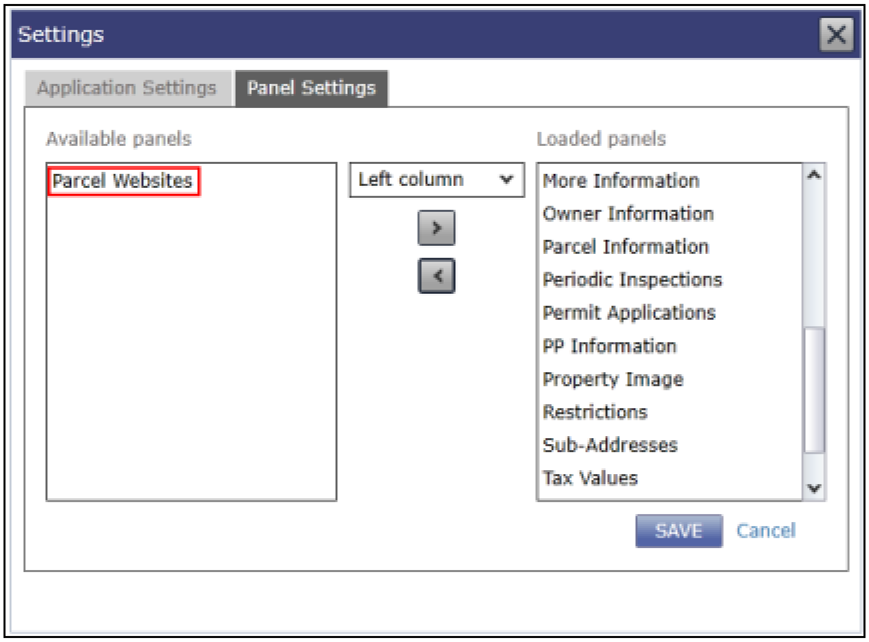


Munis Centrals Programs

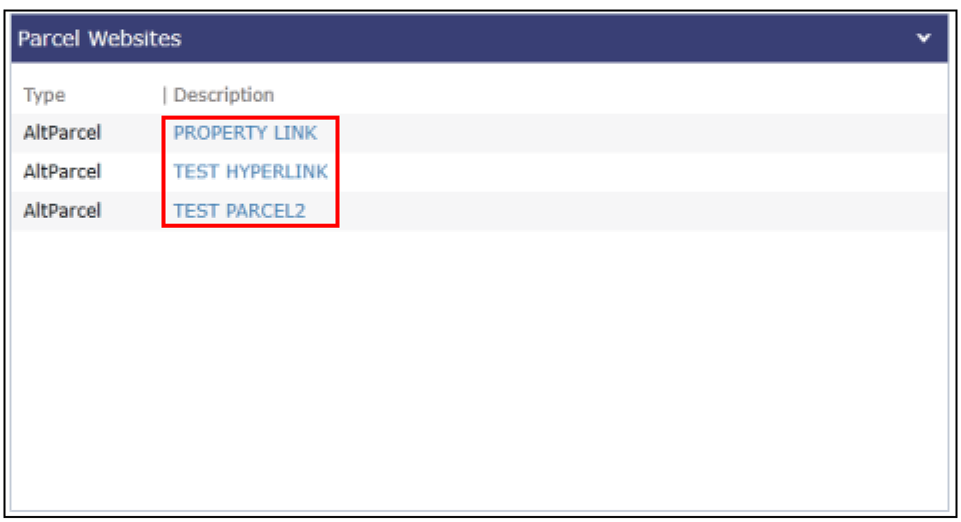
The following changes apply to Munis Centrals programs.

Property Central

The Available Panels group on the Settings screen includes the Parcel Websites option. Prerequisites for using this pane include the creation of the hyperlink code in Permits and Code Enforcement Miscellaneous Codes and the link to the parcel or alternate parcel through the Hyperlink Templates program in Munis Central Property. Refer to the Central Property section of this document for additional information.



When you click a link for a parcel of alternate parcel record, the program connects you to the website address that contains the parcel ID or alternate parcel ID.



System Administration - Revenue Roles

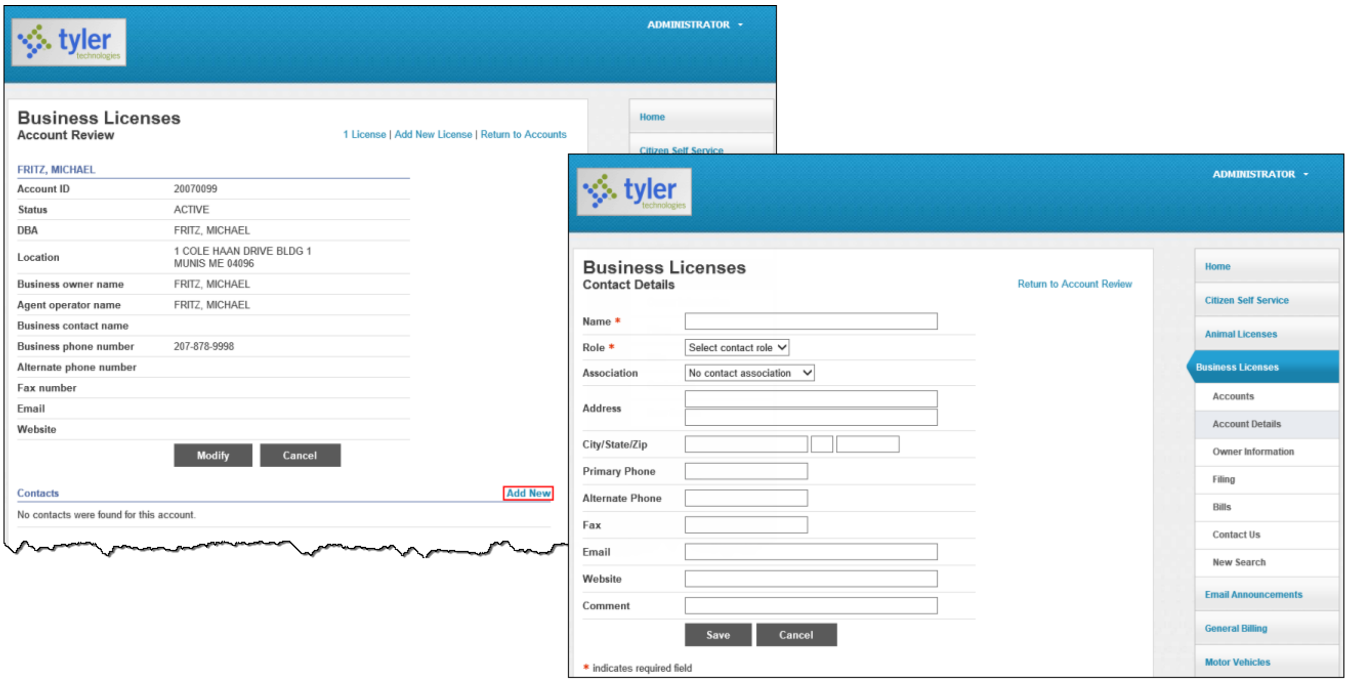
Module	Field Name	Description
Permits and Code Enforcement		
		The Permits and Code Enforcement Roles screen is reorganized to include the Permit Applications/Contractors, Inspections/Violations, and Collections/Others tabs, in addition to the Property Role Permissions tab. The Permit Applications/Contractors tab includes the Add Plan Reviews, Update Plan Reviews, Delete Plan Reviews, Access Electronic Plan Reviews, Start Electronic Plan Reviews, Add Plan Reviews to Application with ePlans, Update Plan Reviews on Application with ePlans, and Delete Plan Reviews from Application with ePlans check boxes for use with electronic plan review software. Note: The default permission value for the Add Plan Reviews, Update Plan Reviews, and Delete Plan Reviews check boxes is a cleared check box value and you will need to select the check boxes.

Citizen Self Service

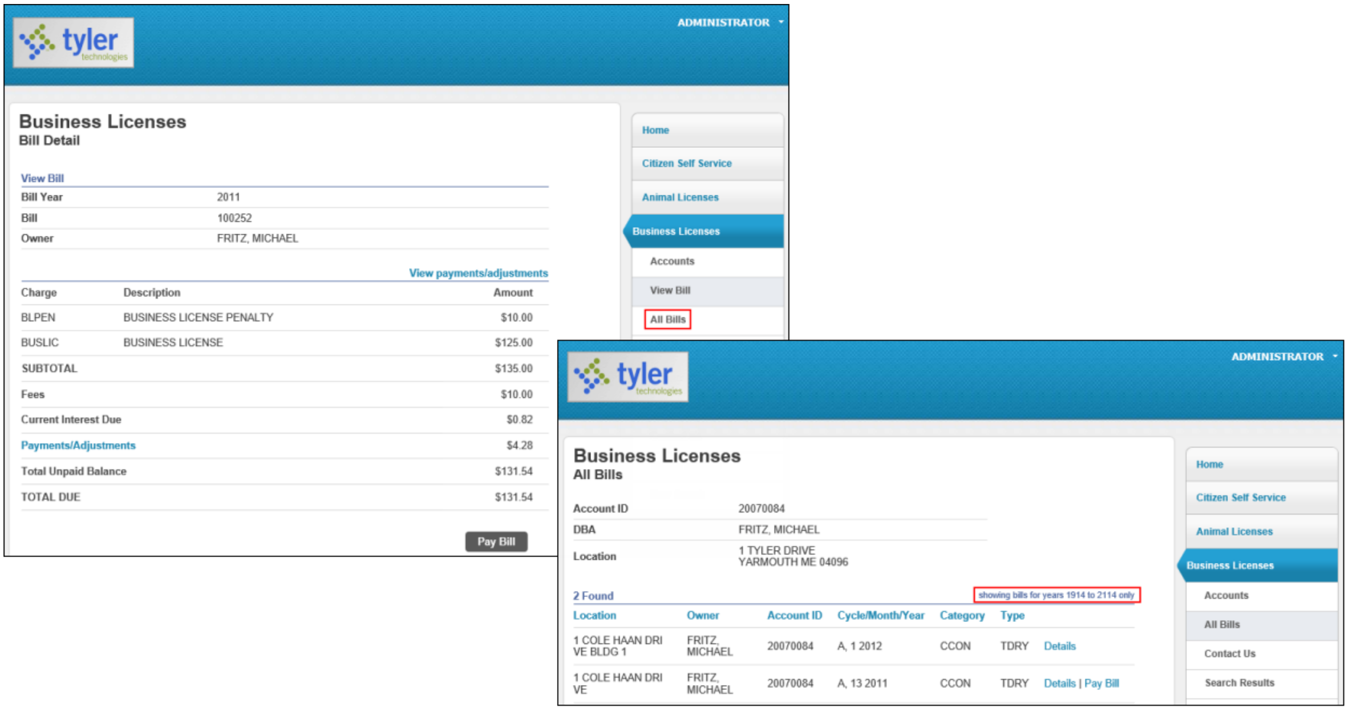
Citizen Self Service (CSS) provides citizen access to Munis Revenues programs. The following changes apply to the Munis Citizen Self Service programs.

Business Licenses

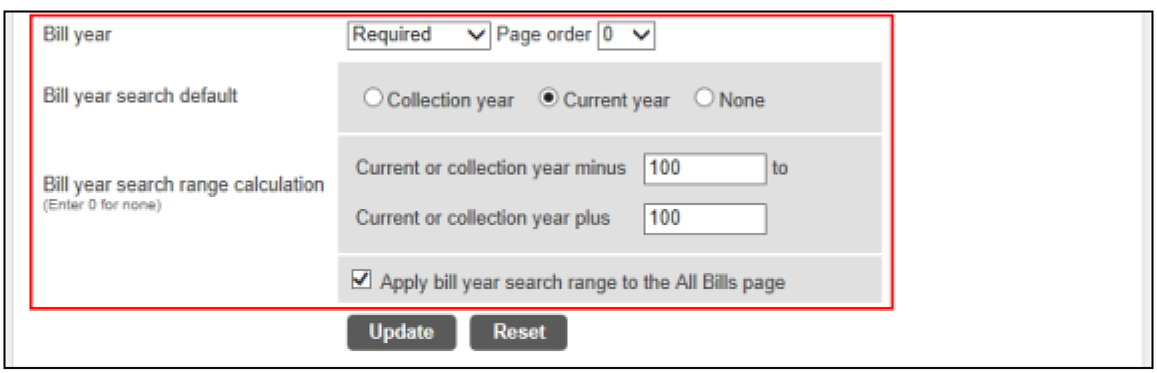
When you click Accounts in Munis Business Licenses, the Add New button allows you to provide contact information. The Modify button on the Contacts Detail page allows you to update contact information.



The All Bills page displays bills associated with a specific account when you search business license records on the Business Licenses Search page, click the Details option on the Search Results screen, and then click the All Bills option in the Business Licenses menu.

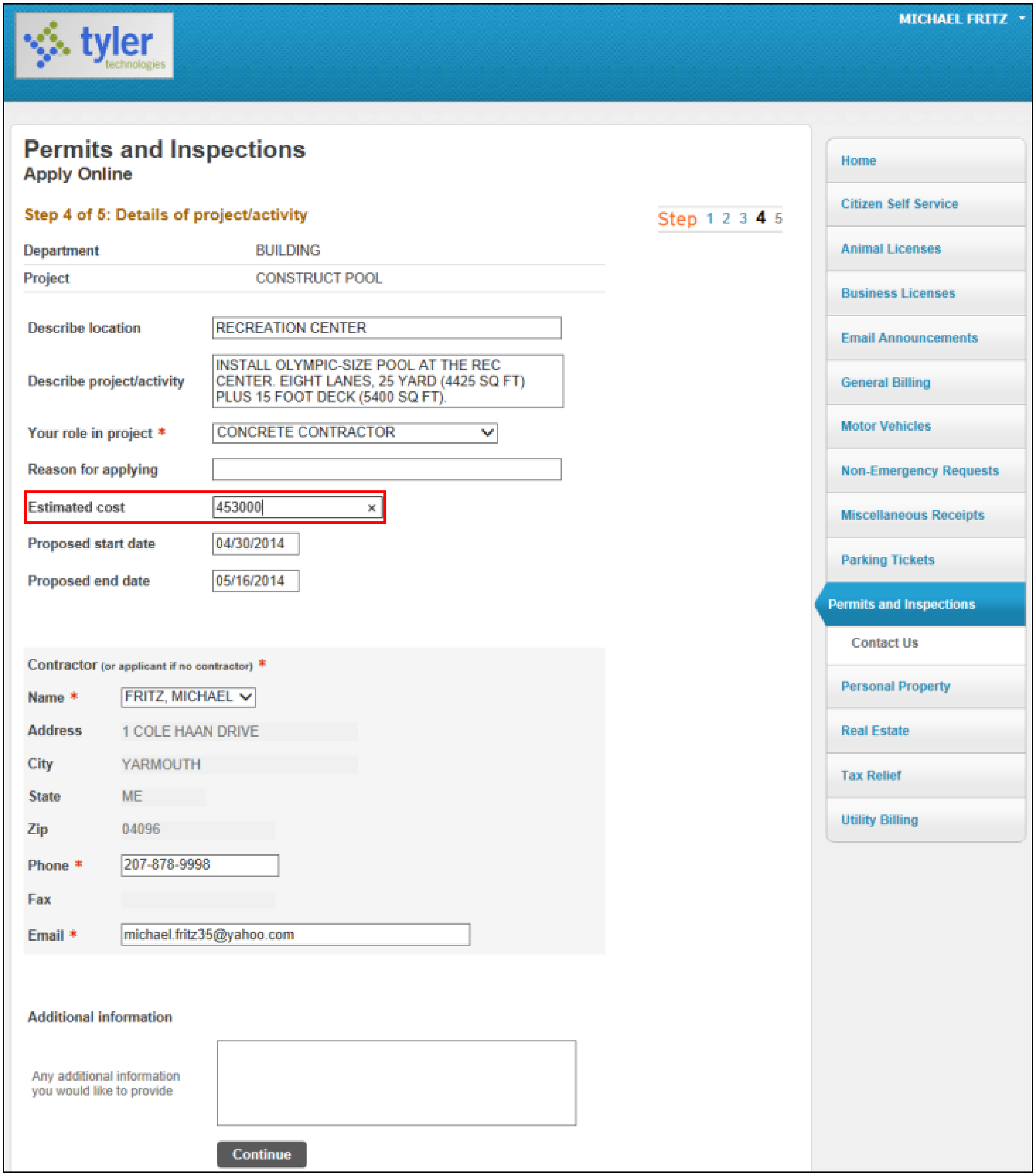


The bills that display on the All Bills page are available when your system administrator selects the Apply Bill Year Search Range to the All Bills Page check box in the Business License Administration page. When that check box is selected, the specified year range in the Bill Year Search Range Calculation is applied to the content of the All Bills page, which displays the year range above the available records.

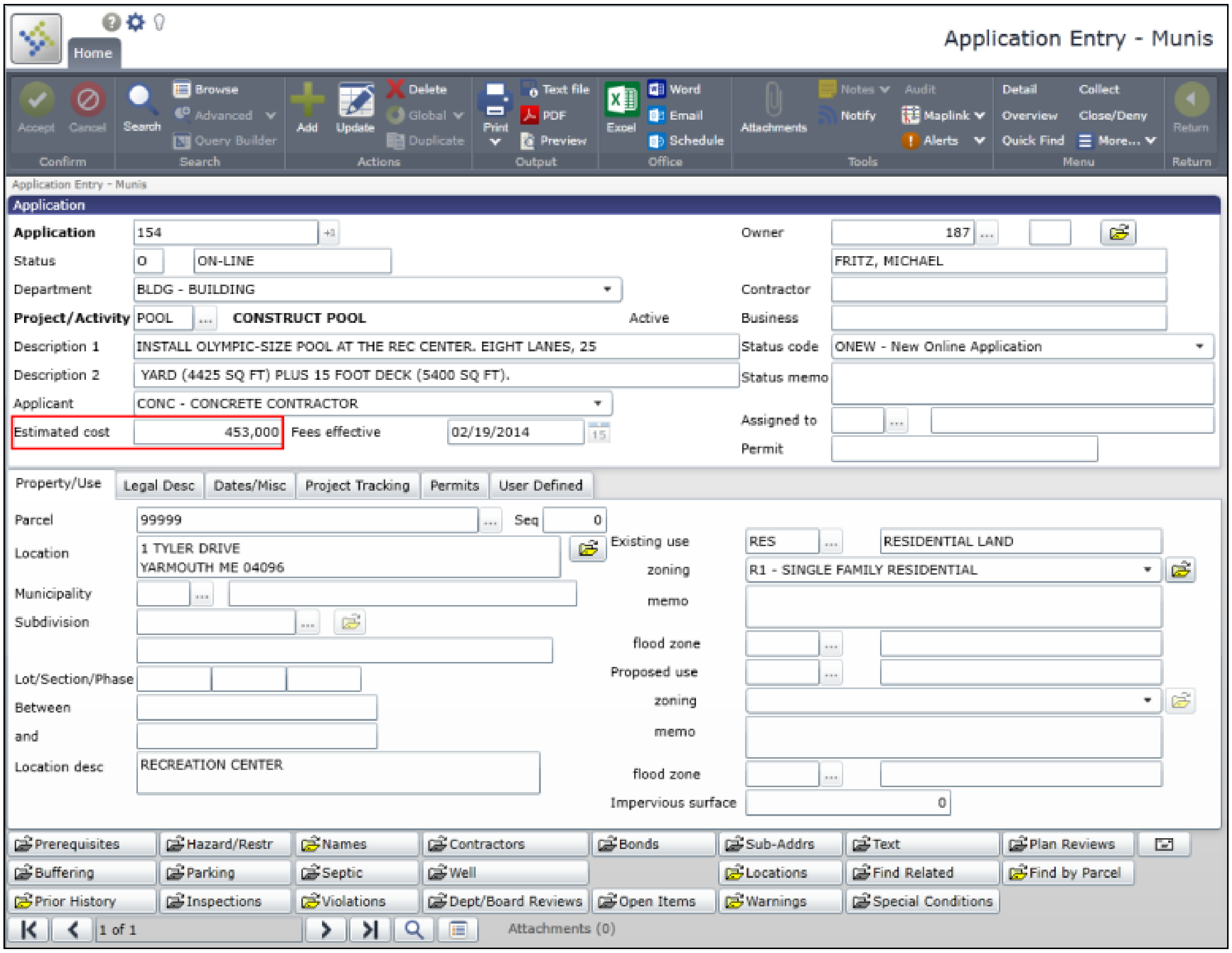


Permits and Inspections

The Estimated Cost box on the Apply Online page of Permits and Inspections allows you to enter an estimated cost as part of the permit application.

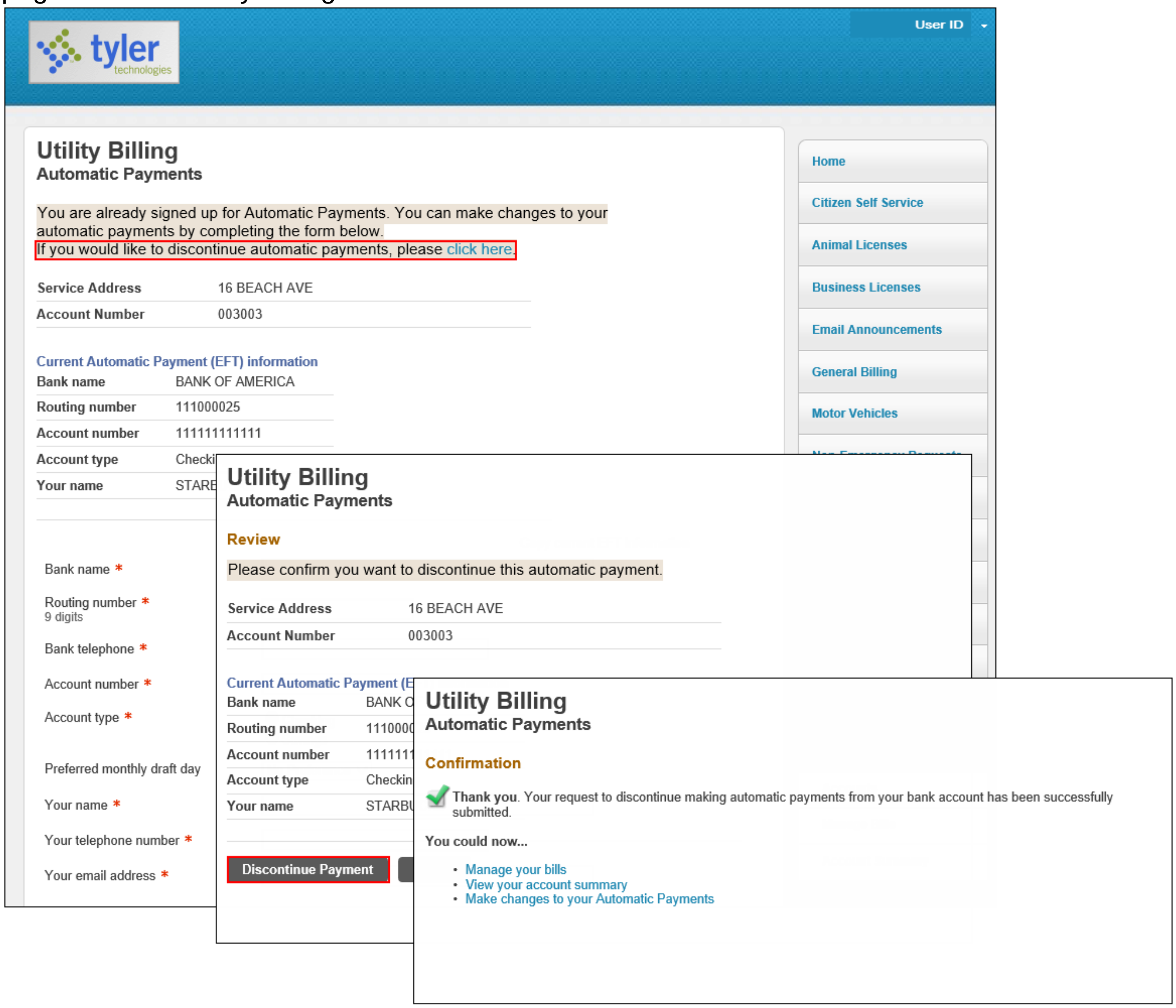


Once the online application is processed, the estimated cost updates the application and related permits which allows the correct fees to be paid.



Utility Billing

When the Activate Automatic Account Payments and the Update Munis EFT When Users Modify Automatic Payment Settings check boxes are selected in CSS Administration for Utility Billing, the Discontinue Automatic Payments option is available on the Automatic Payments page in CCS - Utility Billing.



When you select this option, CSS displays the automatic payment details for review, along with the Discontinue Payments button. When you click Discontinue Payments, the program displays a confirmation page and removes the EFT information for the account from Munis.