



Enterprise ERP
powered by Munis®
Enterprise Revenue Management

*Major Enhancements
2020-2021*

TABLE OF CONTENTS

ENTERPRISE REVENUE MANAGEMENT	4
USER INTERFACE.....	5
USER INTERFACE.....	5
2020.1.....	5
ACCOUNTS RECEIVABLE.....	6
AGING REPORT.....	6
2020.1.....	6
ACCOUNTS RECEIVABLE SETTINGS	7
2020.1.....	7
ACCOUNTS RECEIVABLE SETTINGS, BATCH ENTRY, PAYMENT METHODS	10
2021.1.....	10
BILL REFUND PROCESSING	14
2020.1.....	14
2021.1.....	15
CHARGE CODES	17
2020.3.....	17
CITY FEE CODES.....	18
2021.3.....	18
DEPOSITS UTILITY	19
2021.1.....	19
DETAIL RECEIVABLE REPORT.....	20
2021.2.....	20
MAIL PAYMENT PROCESSING	20
2020.2.....	20
MISCELLANEOUS RECEIPTS, PAYMENTS	23
2021.4.....	23
OVER-SHORT ADJUSTMENT PROCESS.....	25
2020.1.....	25
PROCESS LOCKBOX FILE.....	26
2020.1.....	26
2021.4.....	27
SPECIAL CONDITIONS/NOTES IMPORT	28
2020.1.....	28
TRANSFER OF PAYMENTS.....	29
2020.1.....	29
BUSINESS LICENSES.....	33
BUSINESS LICENSE SETTINGS	33
2020.1.....	33
BUSINESS LICENSE SETTINGS, BUSINESS TYPES, BUSINESS ACCOUNTS, PRINT BUSINESS LICENSES	34
2020.2.....	34
BUSINESS LICENSE SETTINGS, PRINT BUSINESS LICENSES.....	37
2021.1.....	37
BUSINESS TYPES, BUSINESS ACCOUNTS	38
2020.1.....	38
GENERAL BILLING	41
LOANS	41

2020.1.....	41
QUICK ENTRY INVOICES.....	43
2020.2.....	43
RECURRING INVOICES.....	46
2020.1.....	46
PERMITS & CODE ENFORCEMENT.....	48
DEPARTMENT/BOARD CODES.....	48
2020.2.....	48
EVENT NOTIFICATIONS.....	48
2020.2.....	48
2021.2.....	53
INSPECTION ENTRY.....	54
2020.2.....	54
INSPECTION ENTRY EXPORTS.....	54
2020.2.....	54
INSPECTION ENTRY, STATUS CODES.....	55
2020.2.....	55
INSPECTIONS AND VIOLATIONS FOR BUSINESS LICENSES.....	57
2020.2.....	57
FIELD INSPECTOR (MOBILE APP).....	59
2020.2.....	59
PERMITS AND CODE ENFORCEMENT SETTINGS.....	64
2020.2.....	64
PROPERTY CENTRAL.....	65
2021.2.....	65
HUB, PERMITTING.....	66
2020.1.....	66
SYSTEM ADMINISTRATION/ROLES.....	68
2020.1.....	68
2020.2-2021.5.....	68

Enterprise Revenue Management

The Enterprise Revenue Management Major Enhancements document provides an overview of the major enhancements for the Enterprise ERP, powered by Munis® releases: 2020.1, 2020.2, 2020.3, 2021.1, 2021.2, 2021.3, 2021.4, and 2021.5.

For each major enhancement, the document provides the Jira number, the version in which the enhancement was included in Enterprise ERP, a brief purpose statement, and the estimated PACE training time. PACE is the Tyler Planned Annual Continuous Education (PACE) program that supports your organization with ongoing education designed to provide your staff with up-to-date training on new features and functions. For more information on PACE for Enterprise ERP, contact your account representative. When selecting PACE sessions, please keep in mind that sessions are scheduled in four-hour increments.

See the release notes on [Tyler Deploy](#) for descriptions of the general enhancements and program fixes that were completed for Enterprise ERP.

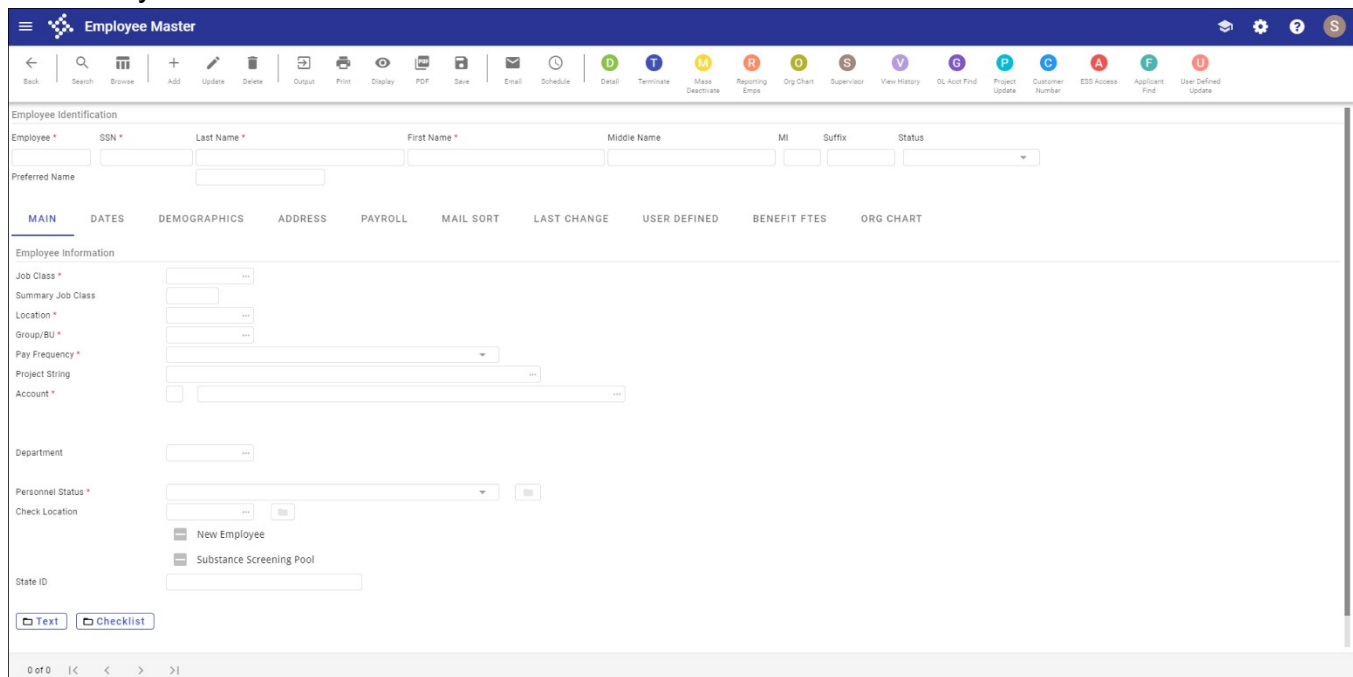
In early 2022, Tyler announced new names for many of its products, including Enterprise ERP. See <https://www.tylertech.com/resources/blog-articles/same-tyler-products-new-names> for more details about this process.

User Interface

User Interface

2020.1

For 2020.1, the user interface (UI) is updated for improved usability. The UI uses a flat design for images, including toolbar options and folder buttons. The fonts used throughout Enterprise ERP, including labels for fields, options, groups, and buttons, are changed for improved readability.



The screenshot displays the 'Employee Master' application interface. At the top, there is a navigation bar with a hamburger menu, a search icon, and a toolbar containing various action icons such as Back, Search, Browse, Add, Update, Delete, Output, Print, Display, PDF, Save, Email, Schedule, Detail, Terminate, Mass Deactivate, Reporting Emps, Org Chart, Supervisor, View History, DL Acct Find, Project Update, Customer Number, ESS Access, Applicant Find, and User Defined Update. Below the navigation bar, the 'Employee Identification' section contains fields for Employee *, SSN *, Last Name *, First Name *, Middle Name, MI, Suffix, and Status. A 'Preferred Name' field is also present. A horizontal tab bar below this section includes 'MAIN', 'DATES', 'DEMOGRAPHICS', 'ADDRESS', 'PAYROLL', 'MAIL SORT', 'LAST CHANGE', 'USER DEFINED', 'BENEFIT FTES', and 'ORG CHART'. The 'Employee Information' section contains fields for Job Class *, Summary Job Class, Location *, Group/BU *, Pay Frequency *, Project String, Account *, Department, Personnel Status *, Check Location, and State ID. The 'Check Location' field has two options: 'New Employee' and 'Substance Screening Pool'. At the bottom left, there are 'Text' and 'Checklist' buttons. The bottom status bar shows '0 of 0' and navigation arrows.

Accounts Receivable

Aging Report

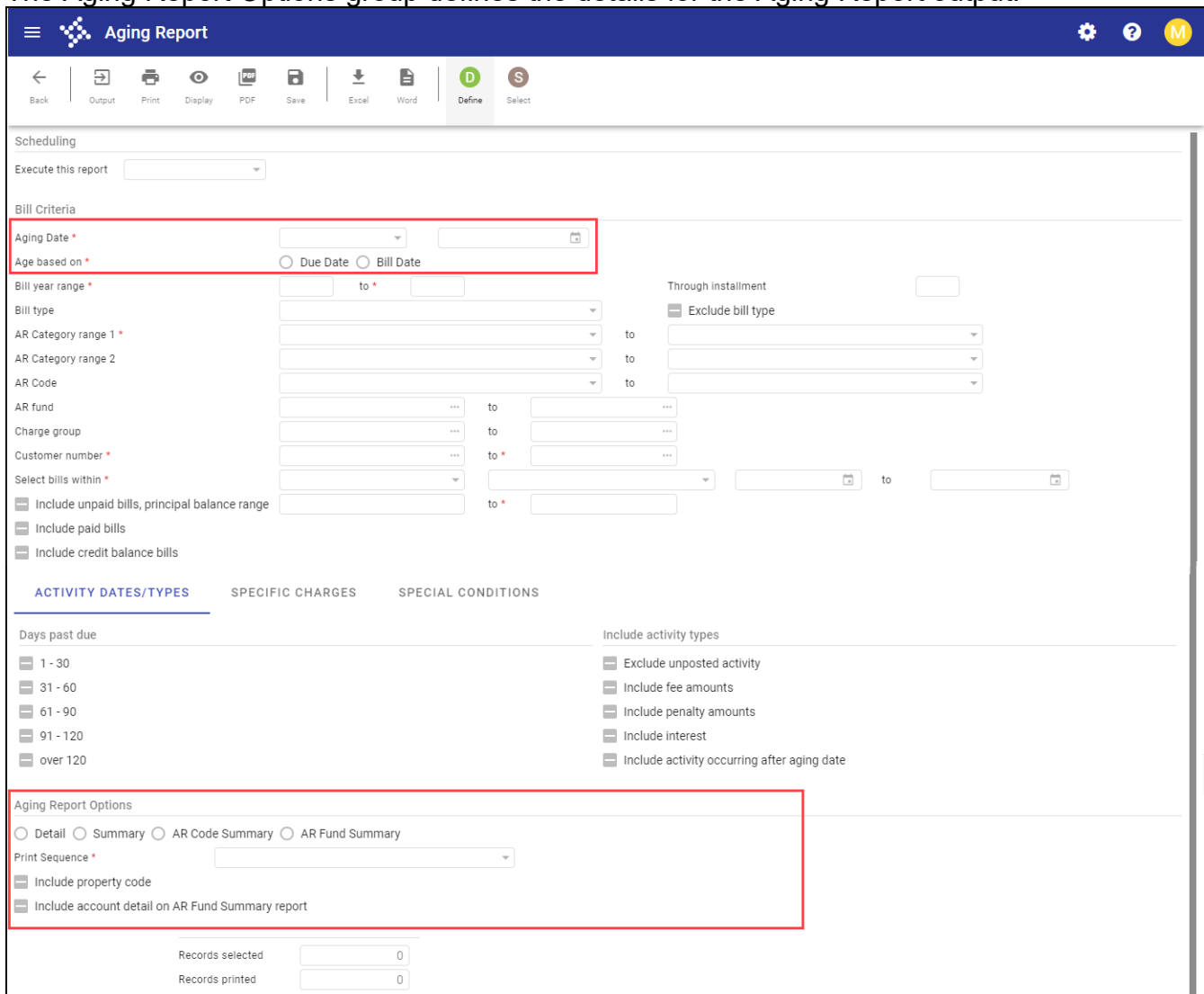
2020.1

Jira Number: MUN-348846

Purpose: To improve the efficiency of creating Accounts Receivable reports.

Estimated PACE Training Time: ½ day

Description: The Aging Report program is merged with the Details Receivable by Date program. When you open the Aging Report program, the available fields are a combination of the Aging Report and Details Receivable by Date programs. The Bill Criteria group includes the Aging Date and Age Based On fields, which are required for creating the Aging Report. The Aging Report Options group defines the details for the Aging Report output.



Accounts Receivable Settings

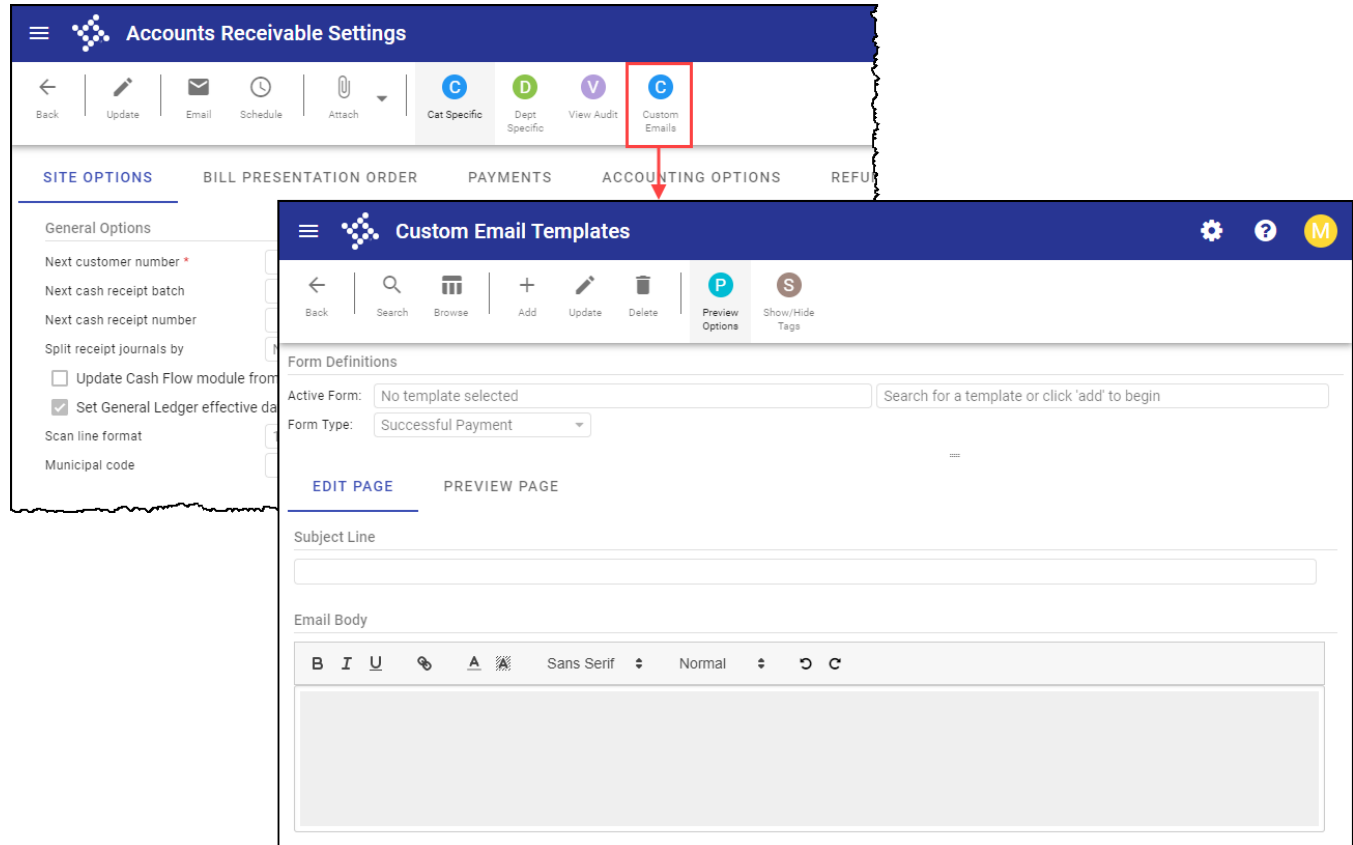
2020.1

Jira Number: MUN-276501

Purpose: To customize email templates for CSS payment activity.

Estimated PACE Training Time: ½ day

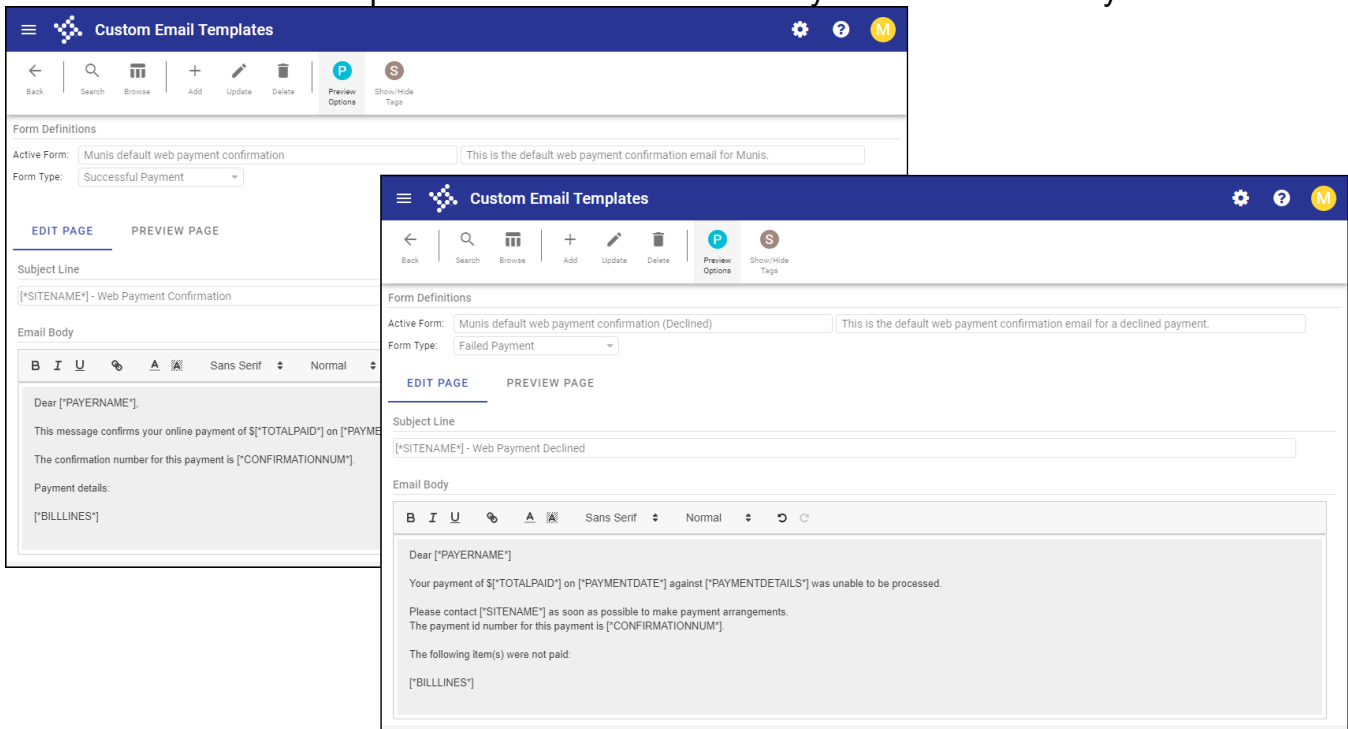
Description: In Accounts Receivable Settings, you can create custom email templates to be used as CSS payment confirmation emails for notifying CSS customers of their payment status.



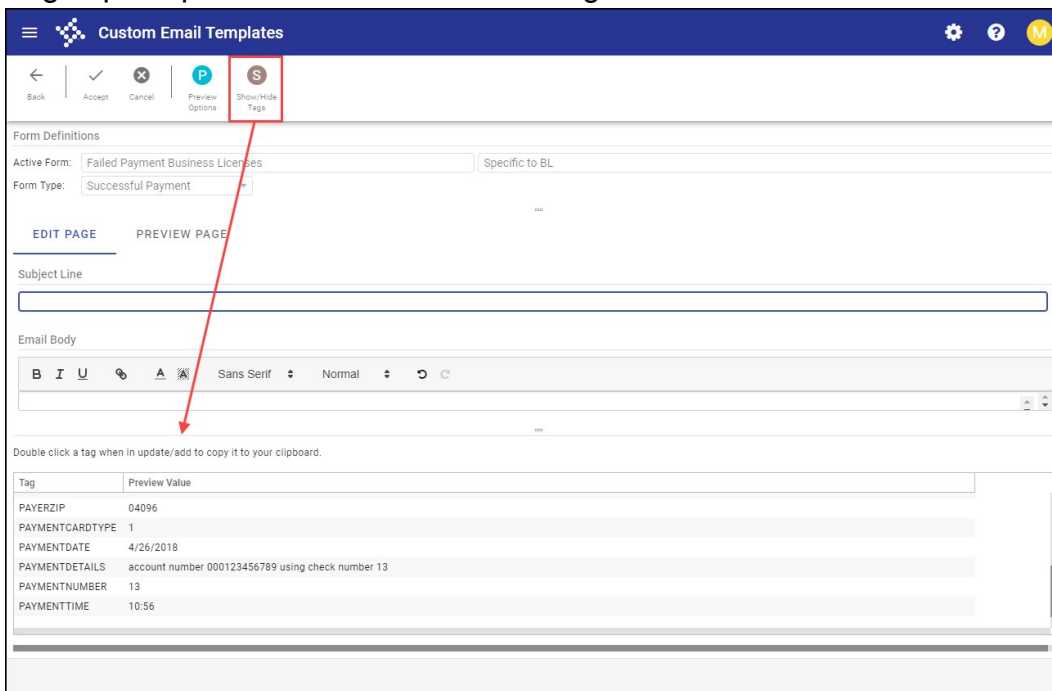
The image shows two screenshots from a software interface. The top screenshot is titled "Accounts Receivable Settings" and features a navigation bar with icons for Back, Update, Email, Schedule, Attach, Cat Specific, Dept Specific, View Audit, and Custom Emails. The "Custom Emails" icon is highlighted with a red box. Below the navigation bar are tabs for SITE OPTIONS, BILL PRESENTATION ORDER, PAYMENTS, ACCOUNTING OPTIONS, and REFUND. The bottom screenshot is titled "Custom Email Templates" and shows a form for creating templates. It includes a search bar, a dropdown for "Form Type" (set to "Successful Payment"), and a rich text editor for the "Email Body" with options for bold, italic, underline, link, text color, background color, font face, and font size. There are also "EDIT PAGE" and "PREVIEW PAGE" buttons.

When you select the Custom Templates option, the Custom Email Templates screen provides options for creating and maintaining the templates.

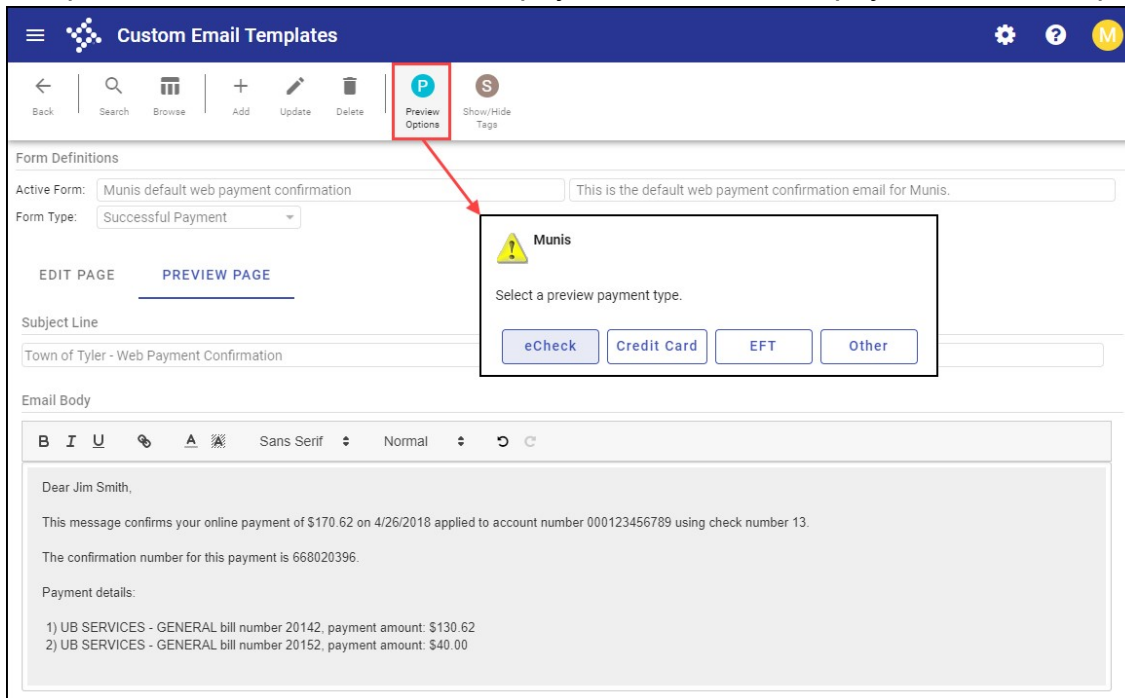
There are two default templates available: Successful Payment and Failed Payment.



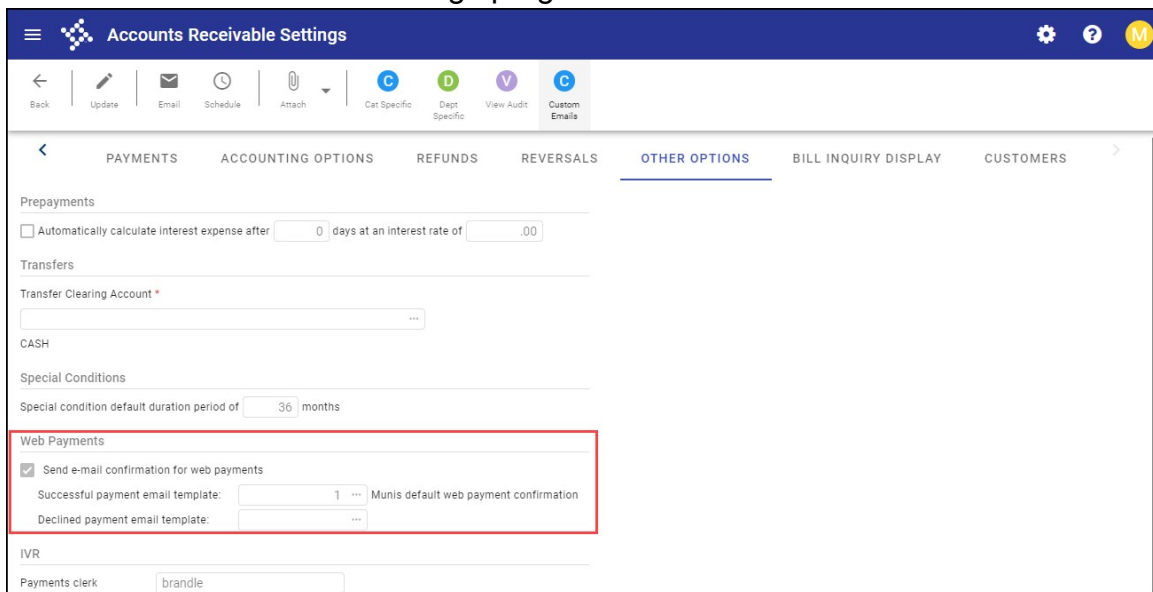
For each template, tags identify customer-specific details that will be replaced with actual data when the emails are distributed by CSS. If you are creating a new template, the Show/Hide Tags option provides a list of available tags.



The Preview Option provides a sample of how the message is presented to customers. You can preview emails based on check payments, credit card payments, or EFT payments.



If you create additional templates, you can reset the default options on the Other Options tab in the Accounts Receivable Settings program.



The Successful Payment Email Template and Declined Payment Email Template fields are available when the Send E-mail Confirmation for Web Payments setting is enabled. If you do

not define new values for these fields, the default Successful Payment and Failed Payment templates are automatically set as the default template options.

Accounts Receivable Settings, Batch Entry, Payment Methods

2021.1

Jira Number: MUN-394695

Purpose: To automatically generate deposit numbers in a defined format.

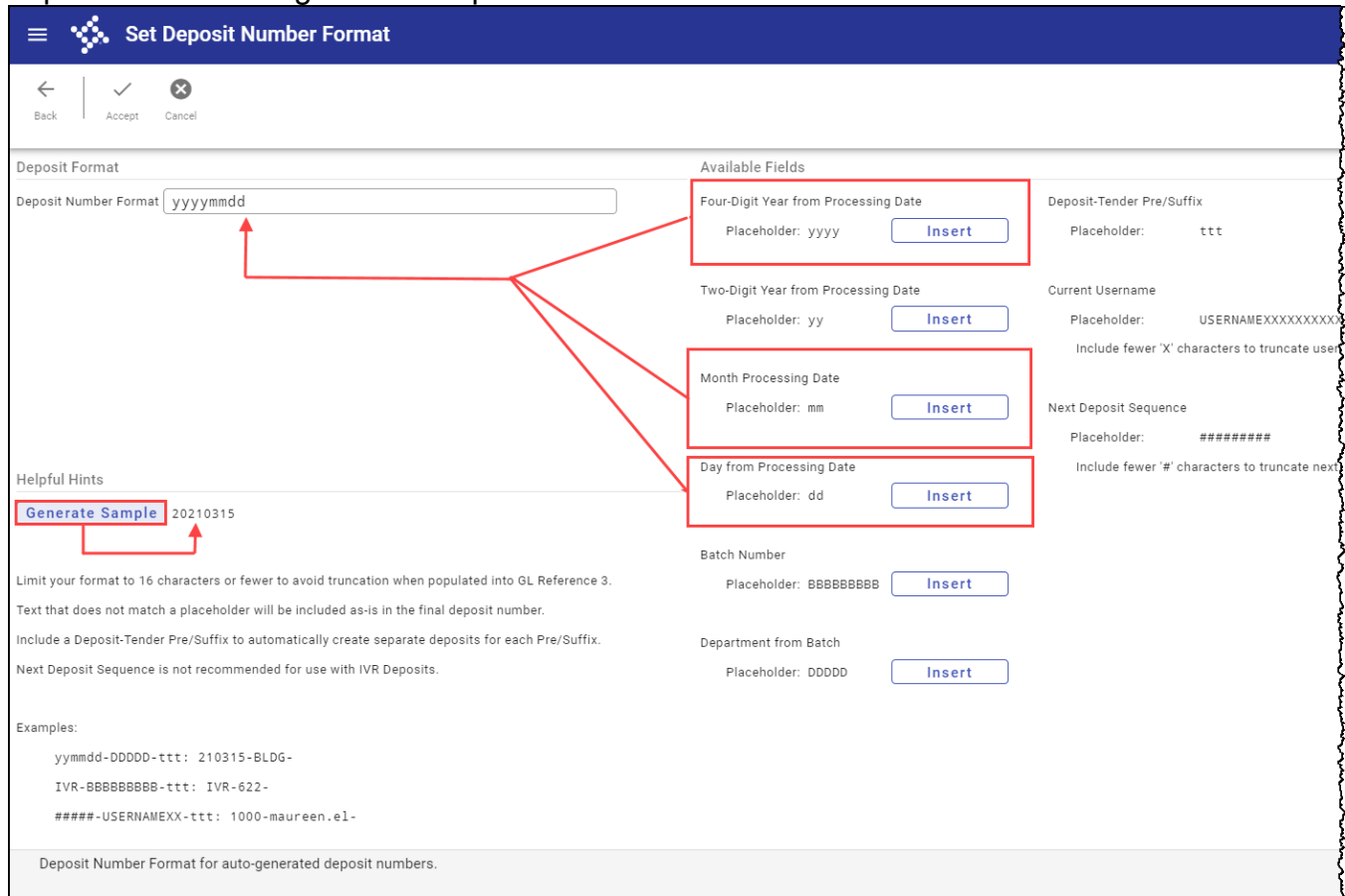
Estimated PACE Training Time: Less than ½ day.

Description: Payment deposit numbers can be automatically generated according to a specified format. In Accounts Receivable Settings, on the Payments tab, the Default Deposit Number Format and Next Deposit Sequence fields provide the setup for this functionality. On the Other Options tab, the IVR Deposit Number Format field defines the automatic numbering for IVR deposits.



The screenshot shows the 'Accounts Receivable Settings' interface with the 'Payments' tab selected. The 'Deposit Settings' section is highlighted with a red box, showing the 'Payment Deposit Number Format' field (empty) and the 'Next Deposit Sequence' field (value: 1000). Below this, the 'Prepayments' section is visible, including a checkbox for 'Automatically calculate interest expense after' (value: 0 days) and an interest rate of .00. At the bottom, the 'IVR Deposit Number Format' field (empty) is also highlighted with a red box. The interface includes a top navigation bar with 'Close', 'Update', 'Email', 'Schedule', 'Attach', and several filter buttons (Cat Specific, Dept Specific, View Audit, Custom Emails). The main navigation tabs are 'Site Options', 'Bill Presentation Order', 'Payments', 'Accounting Options', 'Refunds', and 'Reversals'.

Using the Edit Format button for each of the Deposit Number Format fields, you can define the deposit number using the Set Deposit Number Format screen.



Set Deposit Number Format

Deposit Format

Deposit Number Format

Available Fields

- Four-Digit Year from Processing Date
Placeholder: yyyy
- Two-Digit Year from Processing Date
Placeholder: yy
- Month Processing Date
Placeholder: mm
- Day from Processing Date
Placeholder: dd
- Batch Number
Placeholder: BBBBBBBBB
- Department from Batch
Placeholder: DDDDD

Deposit-Tender Pre/Suffix
Placeholder: ttt

Current Username
Placeholder: USERNAMEXXXXXXXXXX
Include fewer 'X' characters to truncate user

Next Deposit Sequence
Placeholder: #####
Include fewer '#' characters to truncate next

Helpful Hints

20210315

Limit your format to 16 characters or fewer to avoid truncation when populated into GL Reference 3.
Text that does not match a placeholder will be included as-is in the final deposit number.
Include a Deposit-Tender Pre/Suffix to automatically create separate deposits for each Pre/Suffix.
Next Deposit Sequence is not recommended for use with IVR Deposits.

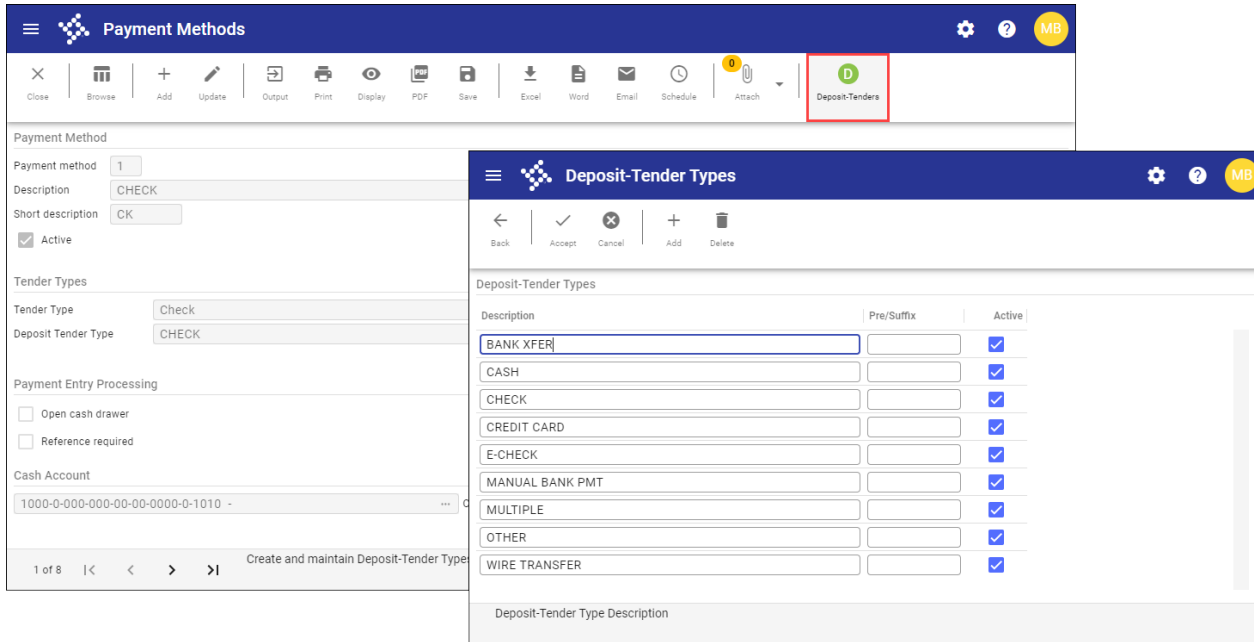
Examples:

yyymmdd-DDDD-ttt: 210315-BLDG-
IVR-BBBBBBBBB-ttt: IVR-622-
#####-USERNAMEXX-ttt: 1000-maureen.e1-

Deposit Number Format for auto-generated deposit numbers.

This screen provides examples and formats to insert for available fields. The on-screen Generate Sample button creates a format sample for review prior to saving.

In the Payment Methods program, the Deposits-Tenders option defines a prefix or suffix for each deposit tender, which is then used when automatically generating deposit numbers. Assigning a prefix or suffix ensures that deposit numbers are not duplicated.



Description	Pre/Suffix	Active
BANK XFER		<input checked="" type="checkbox"/>
CASH		<input checked="" type="checkbox"/>
CHECK		<input checked="" type="checkbox"/>
CREDIT CARD		<input checked="" type="checkbox"/>
E-CHECK		<input checked="" type="checkbox"/>
MANUAL BANK PMT		<input checked="" type="checkbox"/>
MULTIPLE		<input checked="" type="checkbox"/>
OTHER		<input checked="" type="checkbox"/>
WIRE TRANSFER		<input checked="" type="checkbox"/>

On the Batch Entry screen, the Add (+) button for the Default Deposit field allows you to create a default deposit and apply overrides based on your organization's default deposit number

format.

Payment Entry

Close | Accept | Cancel

Batch Information

Batch Number: 625

Entry Date: 03/05/2021

Processing Date: 03/05/2021

Clerk: maureen.elfring

Effective Date: 03/05/2021

GL Effective Date: 03/05/2021

GL Year/Period: 2021 | 9 | MAR

Description:

Department: BLDG

Life Cycle Step: 10 - In Proof/Initial

Deposits

Default Deposit: + Overrides

Batch Totals

Number of Items: 0

Total Amount: .00

Batch Options

90 of 90 |< < > >| Processing Date.

Deposit Overrides

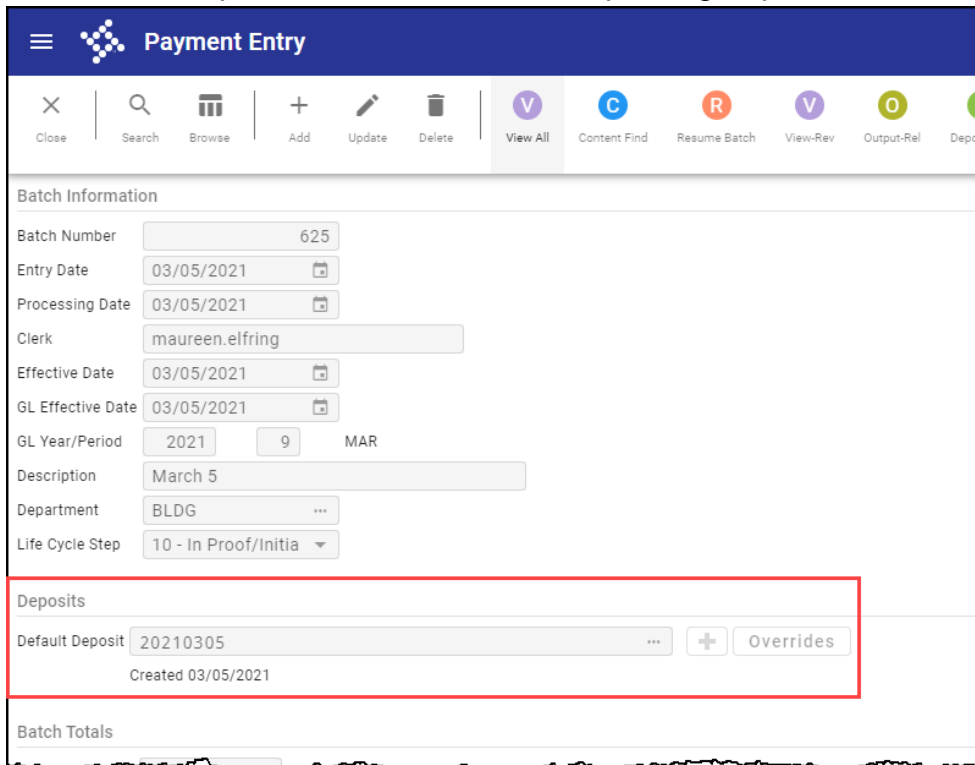
Back | Accept | Cancel

New Deposit Number: 20210305

Deposit Tender Type	Pre/Suffix	Deposit Reference
BANK XFER	XFR	20210305
CASH	CSH	20210305
CHECK	CHK	20210305
CREDIT CARD	CC	20210305
E-CHECK	ECK	20210305
MANUAL BANK PMT		20210305
MULTIPLE		20210305
OTHER		20210305
WIRE TRANSFER		20210305

New deposit number based on your AR Settings. Make any desired changes before saving.

When you complete the deposit details and save the record, the Batch Entry screen displays the date the deposit was created in the Deposits group.



Payment Entry

Close Search Browse Add Update Delete View All Content Find Resume Batch View-Rev Output-Rel Depo

Batch Information

Batch Number: 625
 Entry Date: 03/05/2021
 Processing Date: 03/05/2021
 Clerk: maureen.elfring
 Effective Date: 03/05/2021
 GL Effective Date: 03/05/2021
 GL Year/Period: 2021 9 MAR
 Description: March 5
 Department: BLDG
 Life Cycle Step: 10 - In Proof/Initia

Deposits

Default Deposit: 20210305 + Overrides
 Created 03/05/2021

Batch Totals

Bill Refund Processing

2020.1

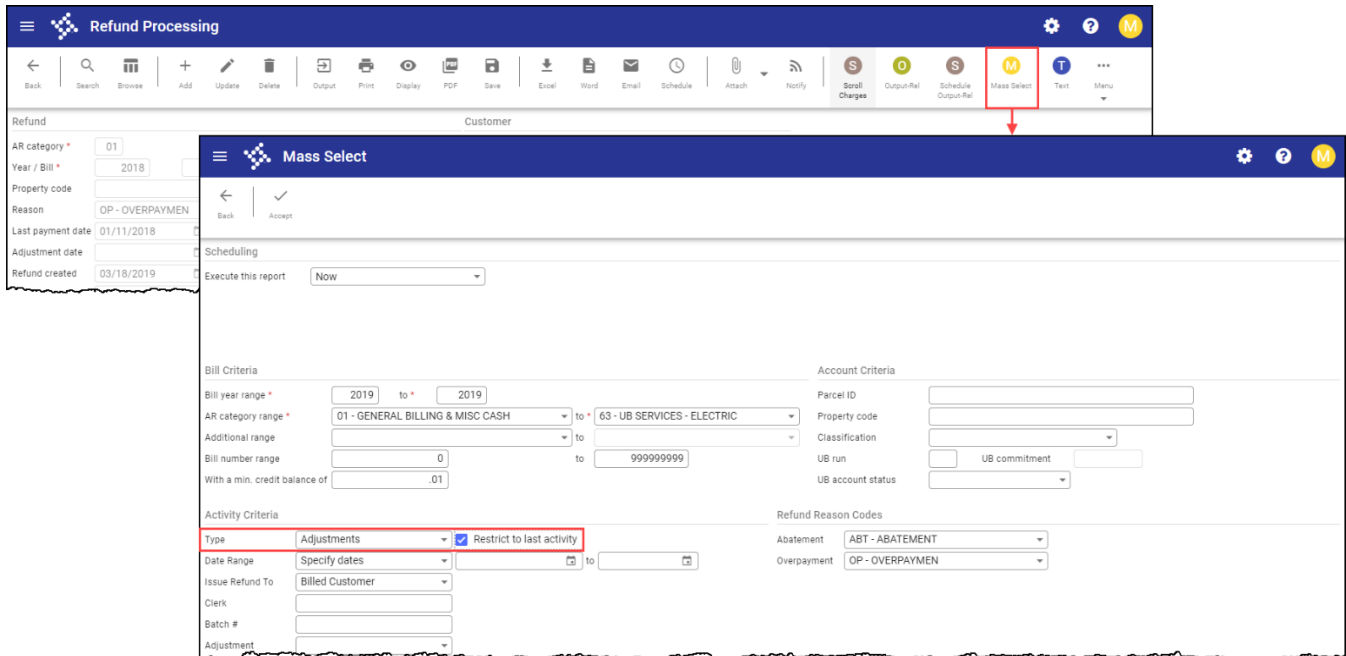
Jira Number: MUN-344060

Purpose: To limit refund processing according to an activity for a specific date range.

Estimated PACE Training Time: ½ day

Description: The Mass Select option uses the date fields when selecting the last activity to include in the process.

When the Restrict to Last Activity checkbox is selected, refunds are selected only for bills for which the last activity type matches the type specified in the Type list and for which the activity falls within the specified date range.



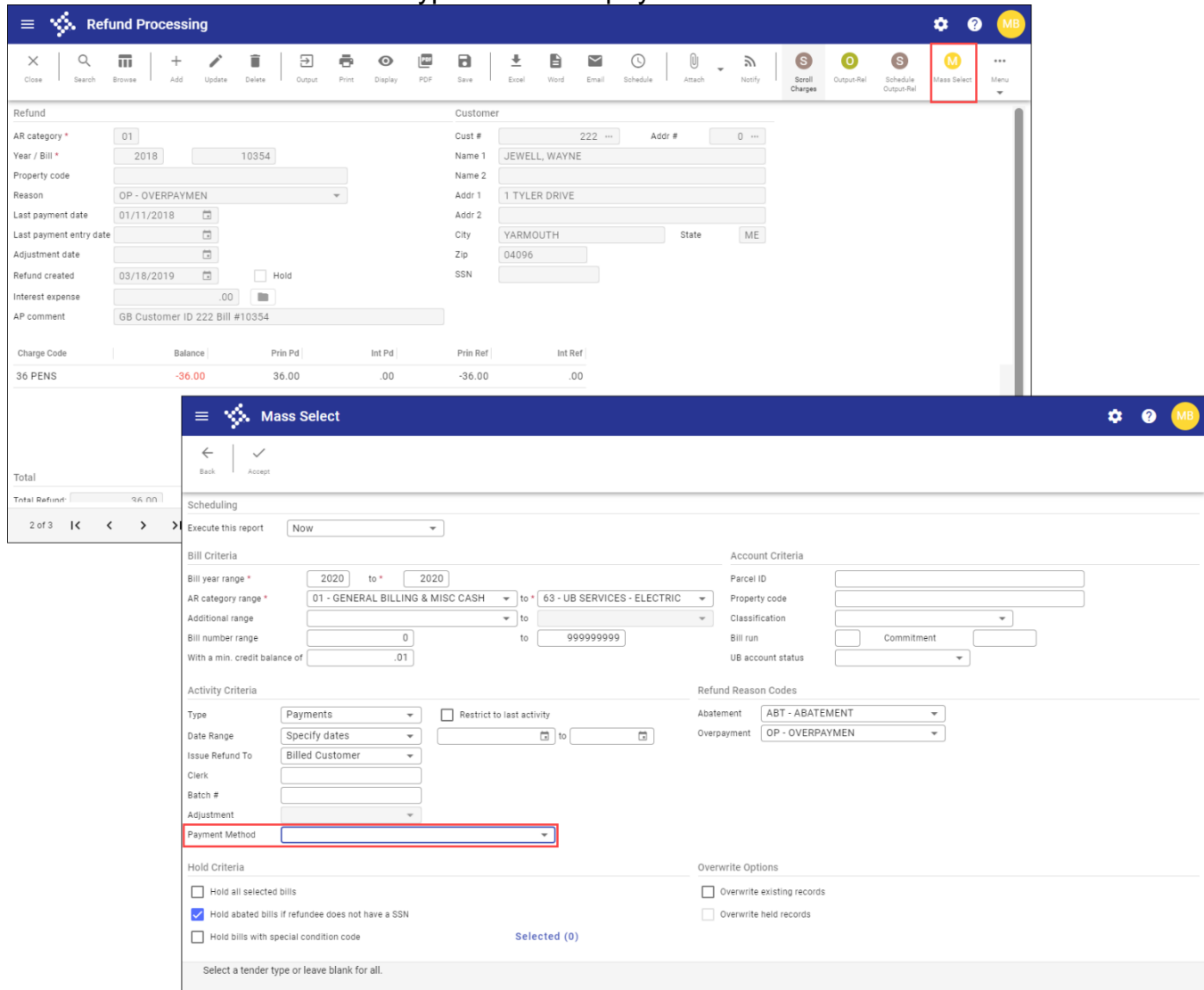
2021.1

Jira Number: MUN-392319

Purpose: To assign a tender type for refund processing.

Estimated PACE Training Time: Less than ½ day.

Description: On the Mass Select screen of the Bill Refund Processing program, the Payment Method list identifies the tender type of the overpayments to select for refund.



The screenshot displays two overlapping software windows. The top window, titled 'Refund Processing', contains a form for entering refund details. Key fields include 'AR category' (01), 'Year / Bill' (2018 / 10354), 'Reason' (OP - OVERPAYMEN), and 'Customer' information (Name: JEWELL, WAYNE; Address: 1 TYLER DRIVE, YARMOUTH, ME 04096). A table at the bottom of this window shows a single entry: '36 PENS' with a balance of '-36.00'. The bottom window, titled 'Mass Select', is a configuration screen for selecting bills. It features several sections: 'Scheduling' (Execute this report: Now), 'Bill Criteria' (Bill year range: 2020 to 2020; AR category range: 01 - GENERAL BILLING & MISC CASH to 63 - UB SERVICES - ELECTRIC), 'Account Criteria' (Parcel ID, Property code, Classification, Bill run, UB account status), 'Activity Criteria' (Type: Payments; Date Range: Specify dates; Issue Refund To: Billed Customer), 'Refund Reason Codes' (Abatement: ABT - ABATEMENT; Overpayment: OP - OVERPAYMEN), and 'Hold Criteria' (Hold all selected bills, Hold abated bills if refundee does not have a SSN, Hold bills with special condition code). The 'Payment Method' dropdown menu is highlighted with a red box. At the bottom of the Mass Select window, it says 'Selected (0)' and 'Select a tender type or leave blank for all.'

The Payment Method list is only accessible when the value of the Type field is Payments. When you select a payment method, the Mass Select process returns only bills that match the defined selection criteria and that are part of a transaction that was paid using the selected payment method.

The Mass Select process does not distinguish between the amount overpaid by the selected payment method versus other payment methods. The full overpayment amount is selected. Similarly, if multiple bills were paid in a single transaction, the process does not attempt to match the voucher to a specific bill. The Mass Select process simply selects all of the bills on the transaction that meet the defined selection criteria.

Charge Codes

2020.3

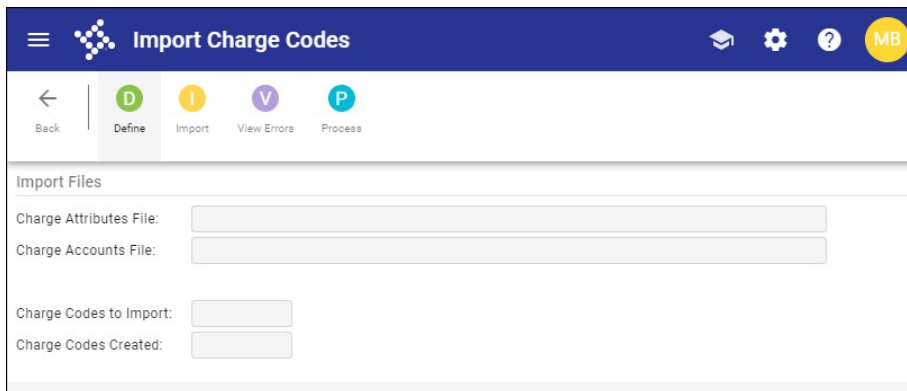
Jira Number: MUN-355547

Purpose: To improve the usability of managing charge codes by providing options for importing and duplicating codes.

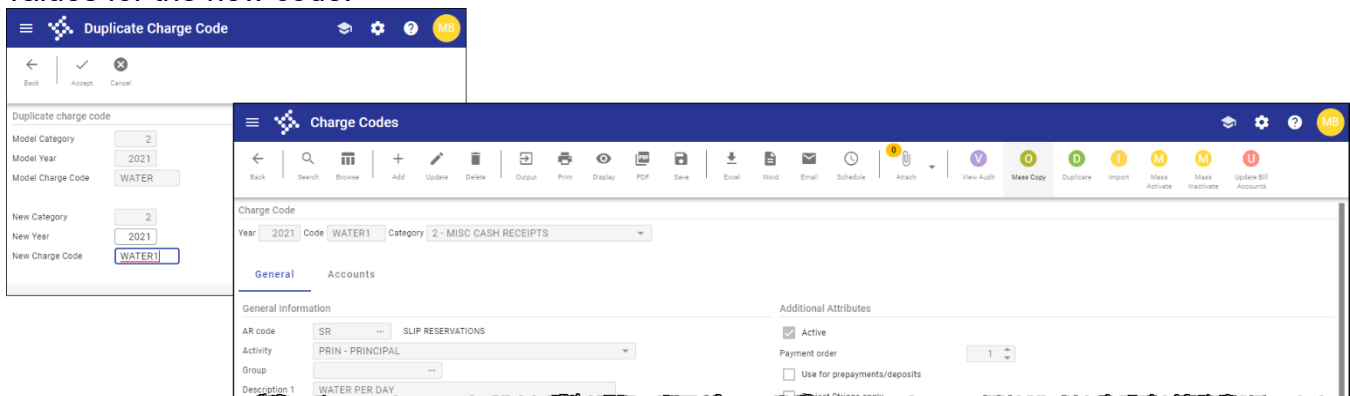
Estimated PACE Training Time: ½ day

Description: The Accounts Receivable Charge Codes program includes the Import and Duplicate toolbar options.

- The Import option imports CSV files of charge code attributes and accounts. The attributes file populates the General tab fields such as the Activity, Description, and Calculation Code fields, and the accounts file completes the Accounts tab information with the required general ledger account numbers and descriptions.



- The Duplicate option creates a new charge code based on the selected charge code criteria. When you navigate to a charge code and click Duplicate, the Duplicate Charge Code screen provides the New Year and New Charge Code fields for defining the new code. When you return to the main screen, you can use the Update option to modify the values for the new code.



City Fee Codes

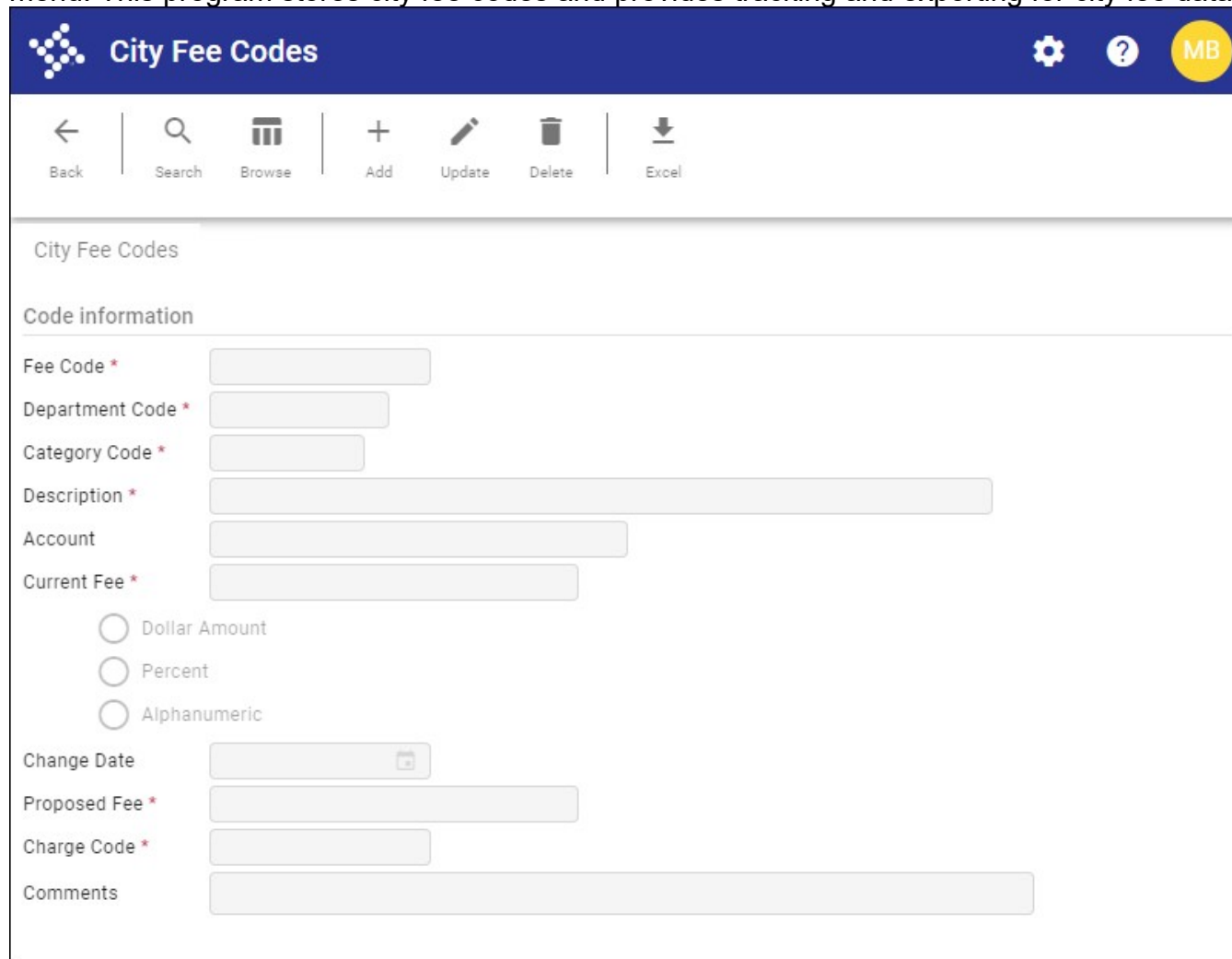
2021.3

Jira Number: MUN-400421

Purpose: To provide tracking codes for city-specific fees.

Estimated PACE Training Time: Less than ½ day.

Description: The City Fee Codes program is available on the Accounts Receivable Setup menu. This program stores city fee codes and provides tracking and exporting for city fee data.



The screenshot shows a web application interface for 'City Fee Codes'. At the top, there is a navigation bar with a back arrow, search icon, browse icon, add icon, update icon, delete icon, and an Excel export icon. Below the navigation bar, the form is titled 'City Fee Codes' and contains the following fields:

- Fee Code *
- Department Code *
- Category Code *
- Description *
- Account
- Current Fee *
- Radio buttons for: Dollar Amount, Percent, Alphanumeric
- Change Date (with a calendar icon)
- Proposed Fee *
- Charge Code *
- Comments

Using the Charge Code field, city fees can be associated with specific charge codes.

The City Fee Codes program is a data storage and export program only. The fee information does not drive any bill or payment amounts or other Accounts Receivable functionality.

Deposits Utility

2021.1

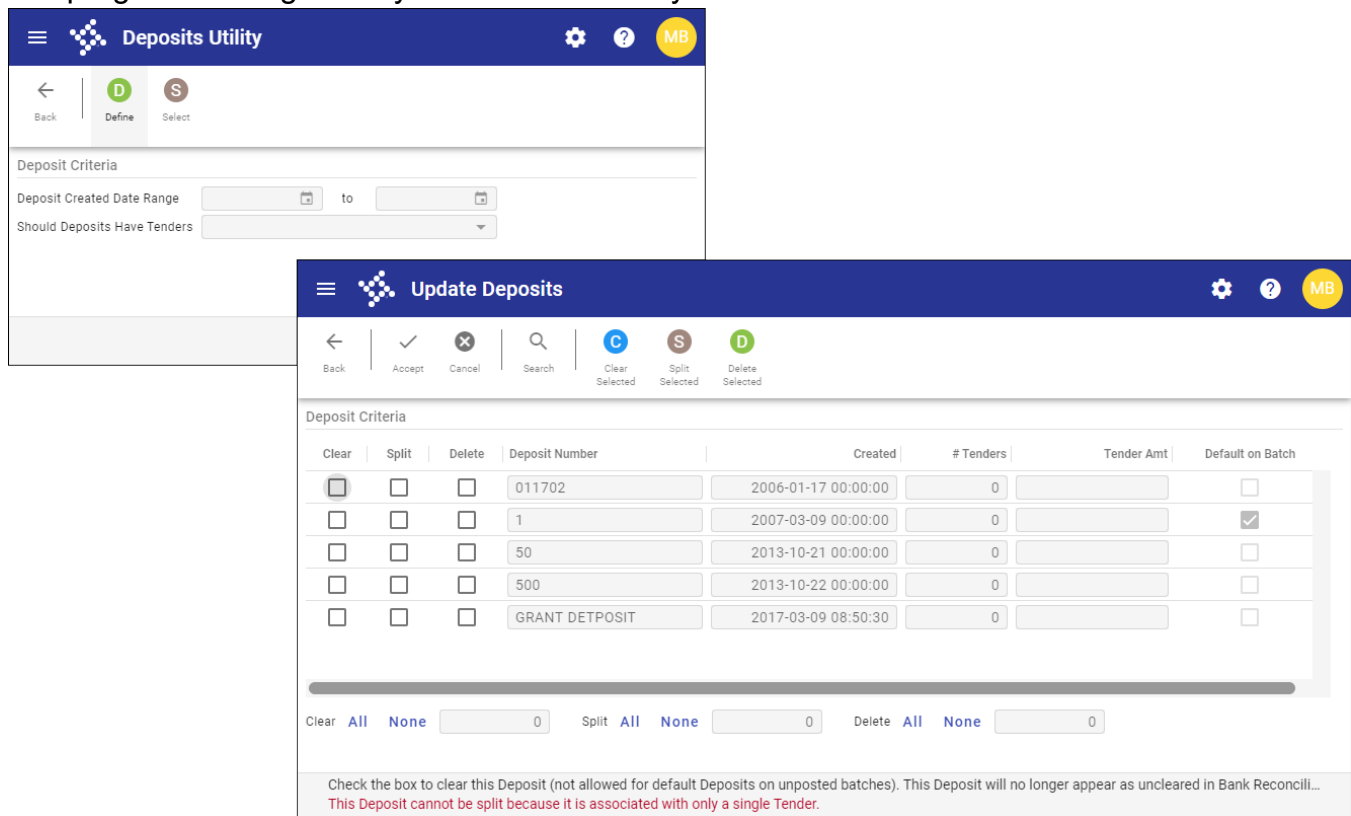
Jira Number: MUN-398465

Purpose: To provide an option for correcting account issues prior to bank reconciliation.

Estimated PACE Training Time: Less than ½ day.

Description: The Deposits Utility program assists with bank reconciliation issues by clearing, splitting, or deleting accounts receivable deposits.

Important! This process is not intended to be completed by general Enterprise ERP users and this program is not generally available on the Tyler menu.



The screenshot displays two overlapping application windows. The top window, titled 'Deposits Utility', has a navigation bar with 'Back', 'Define', and 'Select' buttons. Below the navigation bar, there are input fields for 'Deposit Created Date Range' and a dropdown menu for 'Should Deposits Have Tenders'. The bottom window, titled 'Update Deposits', features a navigation bar with 'Back', 'Accept', 'Cancel', 'Search', 'Clear Selected', 'Split Selected', and 'Delete Selected' buttons. Below the navigation bar, there is a table with the following columns: 'Clear', 'Split', 'Delete', 'Deposit Number', 'Created', '# Tenders', 'Tender Amt', and 'Default on Batch'. The table contains five rows of data. At the bottom of the window, there are summary statistics for 'Clear', 'Split', and 'Delete' actions, and a warning message: 'Check the box to clear this Deposit (not allowed for default Deposits on unposted batches). This Deposit will no longer appear as uncleared in Bank Reconcili... This Deposit cannot be split because it is associated with only a single Tender.'

Clear	Split	Delete	Deposit Number	Created	# Tenders	Tender Amt	Default on Batch
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	011702	2006-01-17 00:00:00	0		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2007-03-09 00:00:00	0		<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	50	2013-10-21 00:00:00	0		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	500	2013-10-22 00:00:00	0		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GRANT DETPOSIT	2017-03-09 08:50:30	0		<input type="checkbox"/>

Once you define the deposit criteria and click Select, the Update Deposits screen provides the options for clearing, splitting, or deleting the deposits:

- Clearing the deposit bypasses the Bank Reconciliation process and prevents the deposit from displaying in Bank Reconciliation. This option is not available if the deposit is identified as a default deposit on an unposted batch.
- Splitting the deposit creates separate deposits based on the general ledger effective date on the tender's batch. One deposit is created for each day and tenders are reassigned as needed, allowing you to more easily reconcile tenders against your daily bank deposits.

- Deleting the deposit removes the deposit from Enterprise ERP. This option is only available if the deposit has no associated tenders and is not attached to any batches or settlements.

Detail Receivable Report

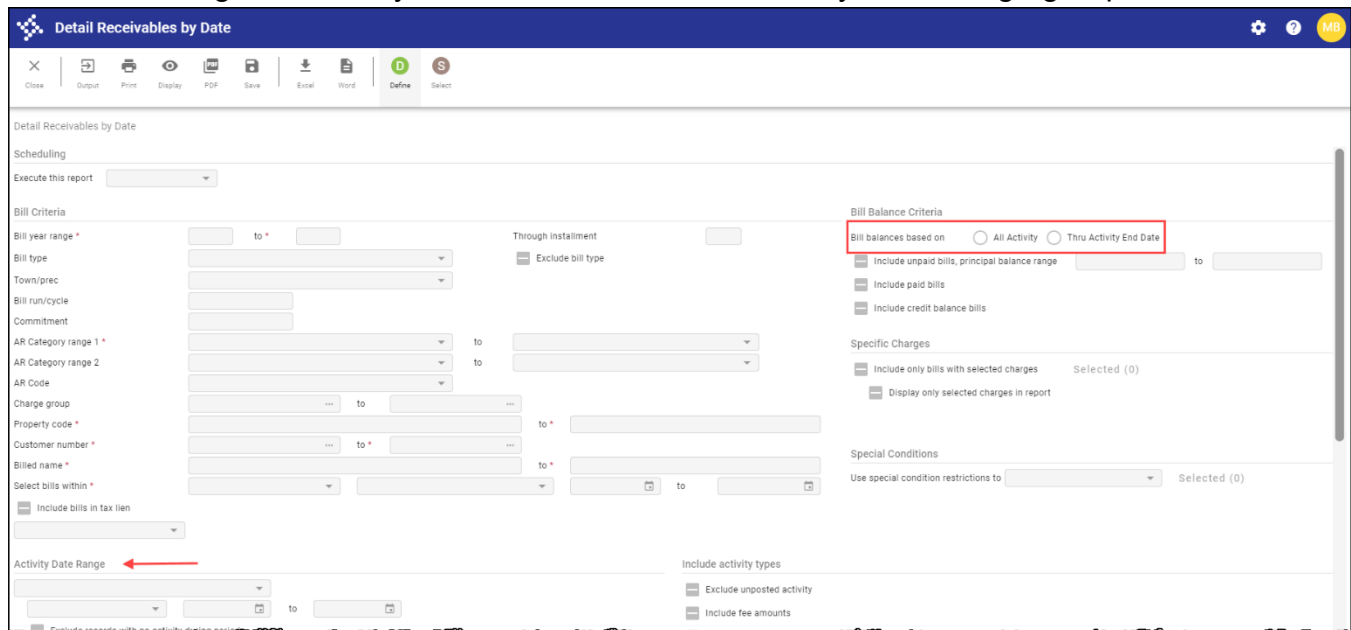
2021.2

Jira Number: MUN-411356

Purpose: To calculate bill balances for all activity or only for activity that occurred through the defined end date.

Estimated PACE Training Time: Less than ½ day.

Description: In the Detail Receivables by Date program, the Bill Balances Based On option determines whether the bill balances are selected based on all activity or only on activity that occurred through the activity end date defined in the Activity Date Range group.



In addition, the Detail Receivables by Date screen is revised to remove tabs and present all fields in organized groups on the main screen.

Mail Payment Processing

2020.2

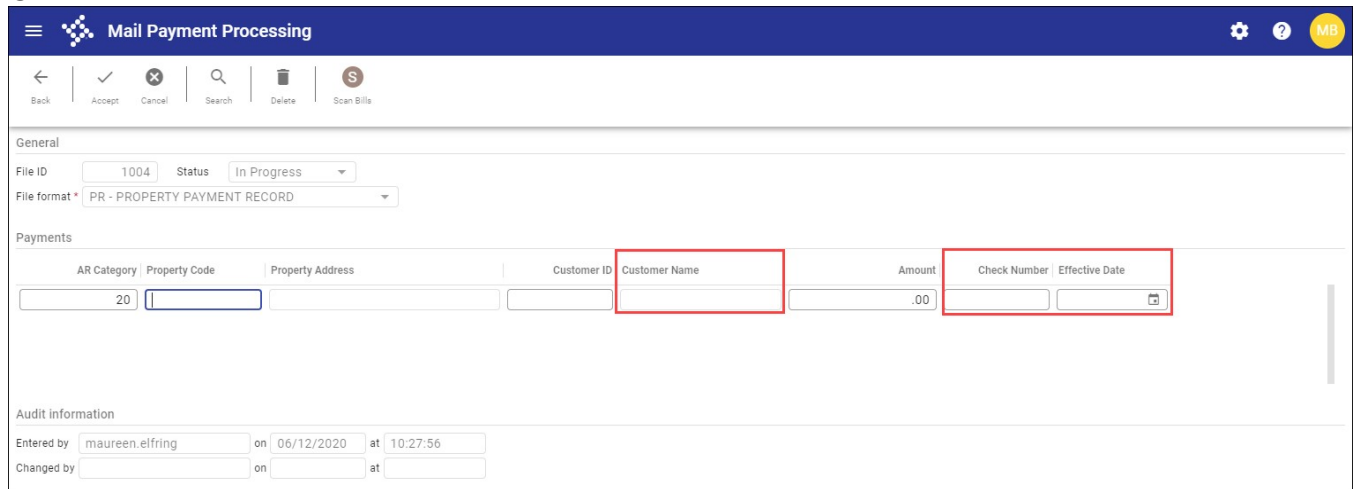
Jira Number: MUN-356502

Purpose: To improve mail payment processing.

Estimated PACE Training Time: Less than ½ day

Description: The Mail Payment Processing program is updated to provide more efficient processing. In the Payments group, the Effective Date field includes the calendar button for selecting a date. Also in the Payments group for the Property Payment lockbox format, the

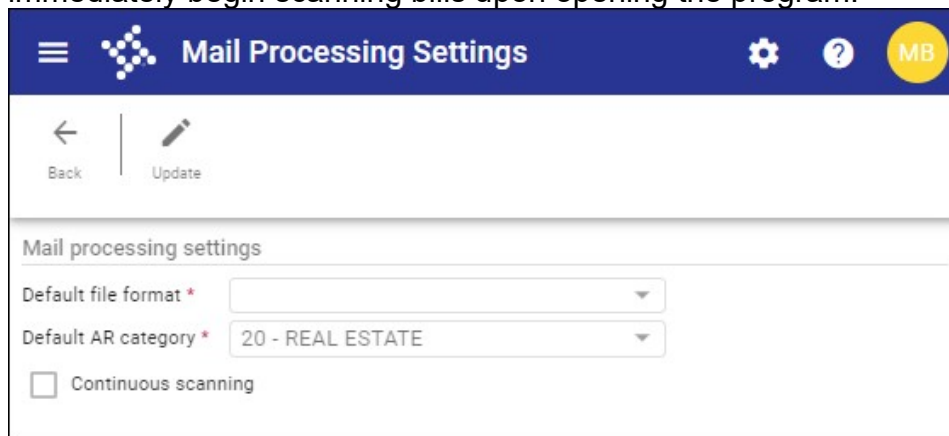
Check Number field is available.



The screenshot shows the 'Mail Payment Processing' interface. At the top, there is a navigation bar with a hamburger menu, a search icon, and a user profile icon labeled 'MB'. Below the navigation bar is a toolbar with icons for Back, Accept, Cancel, Search, Delete, and Scan Bills. The main content area is divided into sections: 'General' with fields for File ID (1004) and Status (In Progress); 'File format' (PR - PROPERTY PAYMENT RECORD); 'Payments' section with a table of payment entries. The table has columns for AR Category, Property Code, Property Address, Customer ID, Customer Name, Amount, Check Number, and Effective Date. The 'Customer Name' and 'Check Number' fields are highlighted with red boxes. Below the table is an 'Audit information' section with fields for Entered by, on, at, and Changed by.

For all lockbox formats, the customer's primary name displays during entry, allowing you to verify the customer account to which the payment is being applied. For the property format, there is no specific bill to retrieve for the customer so the name is retrieved for the most recent bill for the property code/customer number combination.

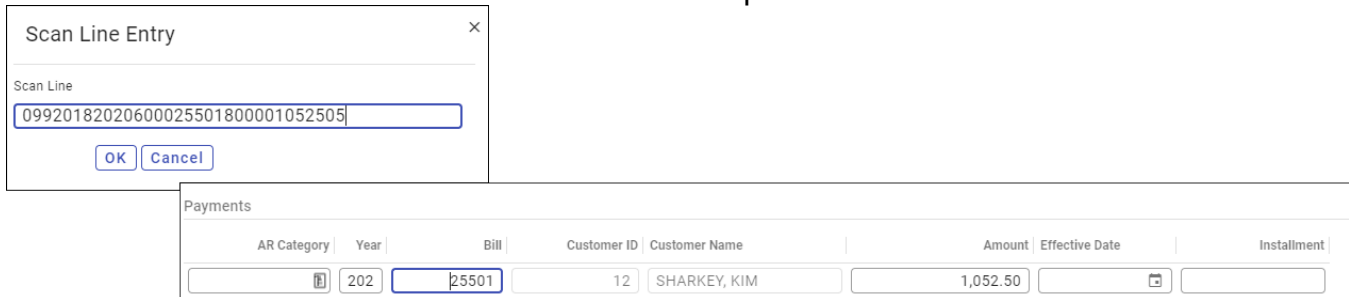
On the Mail Processing Settings screen, selecting Continuous Scanning allows you to immediately begin scanning bills upon opening the program.



The screenshot shows the 'Mail Processing Settings' interface. At the top, there is a navigation bar with a hamburger menu, a search icon, and a user profile icon labeled 'MB'. Below the navigation bar is a toolbar with icons for Back and Update. The main content area is titled 'Mail processing settings' and contains three settings: 'Default file format' (a dropdown menu), 'Default AR category' (a dropdown menu with '20 - REAL ESTATE' selected), and 'Continuous scanning' (a checkbox that is currently unchecked).

When you begin the payment process and you identify the file format, clicking Accept makes the Payments group accessible, allowing you to move directly to payment entry mode.

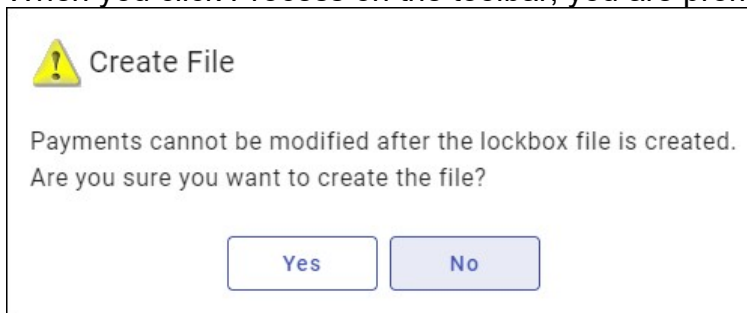
When you click the Scanline button during the payment entry process, the program provides the Scan Line Entry dialog box. After entering a bill's scanline, the program completes the AR Category, Year, Bill, Customer ID, Customer Name, and Amount fields, leaving only the Effective Date and Installment fields for manual completion.



The image shows two overlapping windows. The top window is titled "Scan Line Entry" and contains a text field with the scanline "09920182020600025501800001052505" and "OK" and "Cancel" buttons. The bottom window is titled "Payments" and shows a table with the following data:

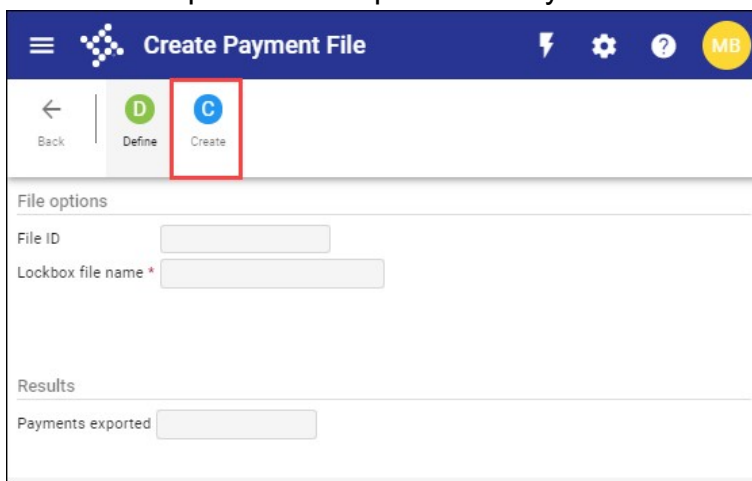
AR Category	Year	Bill	Customer ID	Customer Name	Amount	Effective Date	Installment
	202	25501	12	SHARKEY, KIM	1,052.50		

The Create File and Process File toolbar options are combined within the Process option. When you click Process on the toolbar, you are prompted to create the lockbox file.



The image shows a dialog box with a yellow warning icon and the title "Create File". The text inside reads: "Payments cannot be modified after the lockbox file is created. Are you sure you want to create the file?". At the bottom, there are "Yes" and "No" buttons.

After defining the lockbox file name, clicking Create generates the file, which is stored in your default Enterprise ERP export directory.



The image shows a screenshot of the "Create Payment File" application window. The title bar includes a menu icon, the Tyler logo, the text "Create Payment File", and icons for help, settings, and a user profile (MB). Below the title bar is a navigation bar with "Back", "Define", and "Create" buttons. The "Create" button is highlighted with a red box. The main area is divided into "File options" and "Results" sections. The "File options" section has input fields for "File ID" and "Lockbox file name *". The "Results" section has a "Payments exported" field.

Miscellaneous Receipts, Payments

2021.4

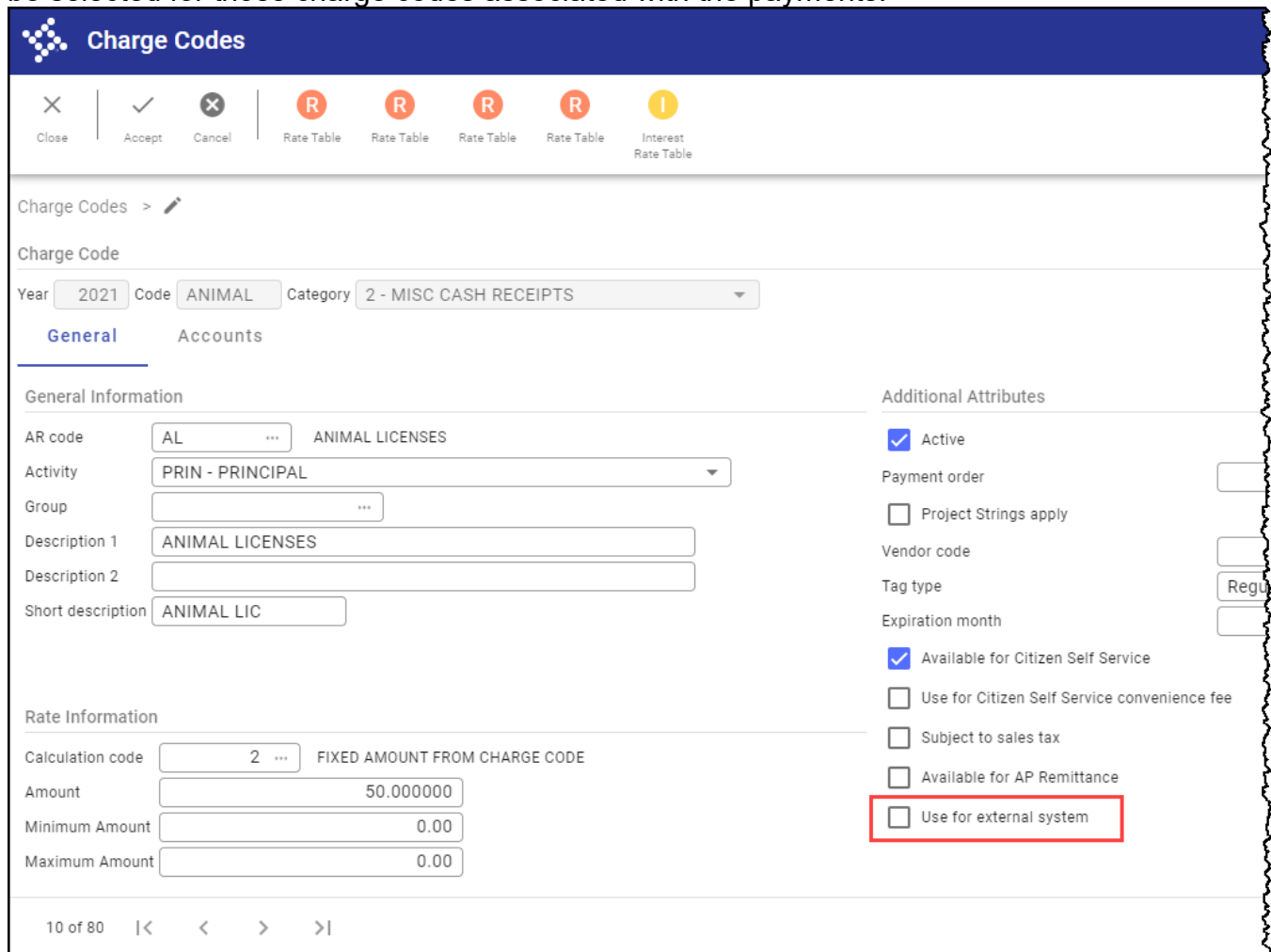
Jira Number: MUN-421931

Purpose: To integrate Enterprise ERP Miscellaneous Receipts with Payments processing.

Estimated PACE Training Time: Less than ½ day.


Description: When Payments is configured for your organization, you can collect and process miscellaneous receipt payments through Enterprise ERP payment processing.

For the integration, the Use for External System checkbox in the Charge Codes program must be selected for those charge codes associated with the payments.



Charge Codes

Close | Accept | Cancel | Rate Table | Rate Table | Rate Table | Rate Table | Interest Rate Table

Charge Codes > 

Charge Code

Year: 2021 | Code: ANIMAL | Category: 2 - MISC CASH RECEIPTS

General | Accounts

General Information

AR code: AL ... ANIMAL LICENSES

Activity: PRIN - PRINCIPAL

Group: ...

Description 1: ANIMAL LICENSES

Description 2:

Short description: ANIMAL LIC

Rate Information

Calculation code: 2 ... FIXED AMOUNT FROM CHARGE CODE

Amount: 50.000000

Minimum Amount: 0.00

Maximum Amount: 0.00

Additional Attributes

Active

Payment order:

Project Strings apply

Vendor code:

Tag type: Regu

Expiration month:

Available for Citizen Self Service

Use for Citizen Self Service convenience fee

Subject to sales tax

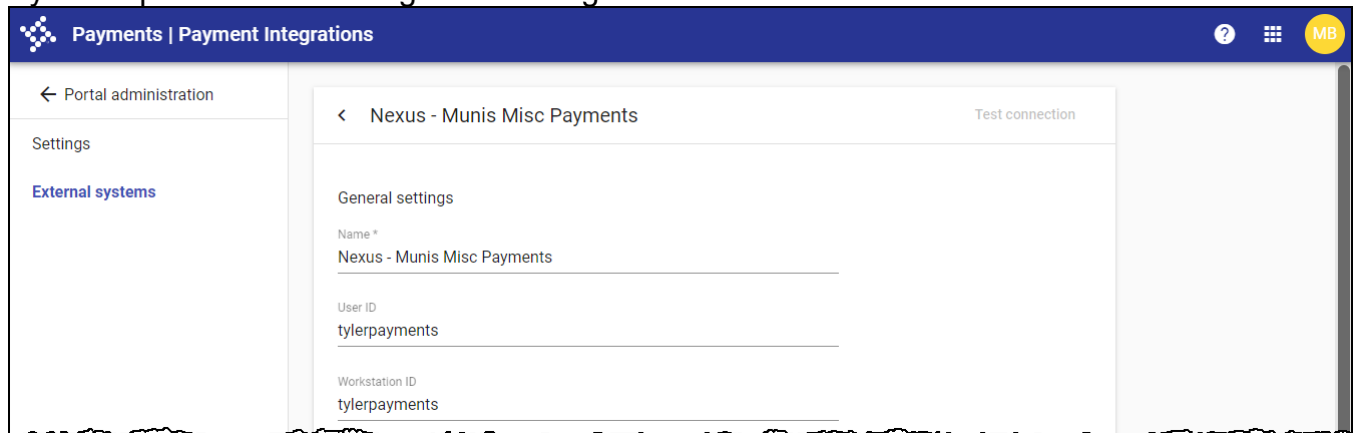
Available for AP Remittance

Use for external system

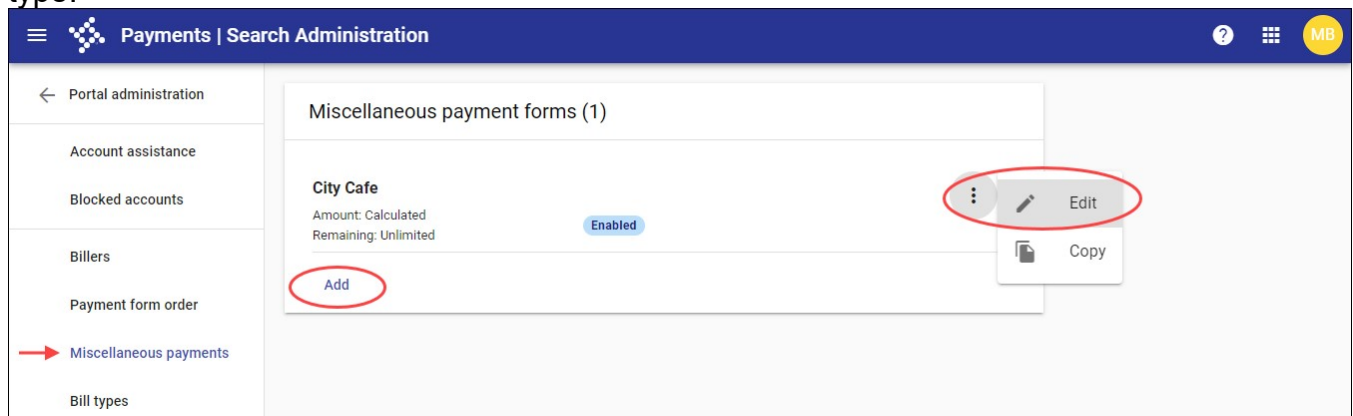
10 of 80 |< < > >|

In Payments, there must be a link between Enterprise ERP Miscellaneous Receipts and Payments. On the Payment Integrations page in Portal Administration, selecting External

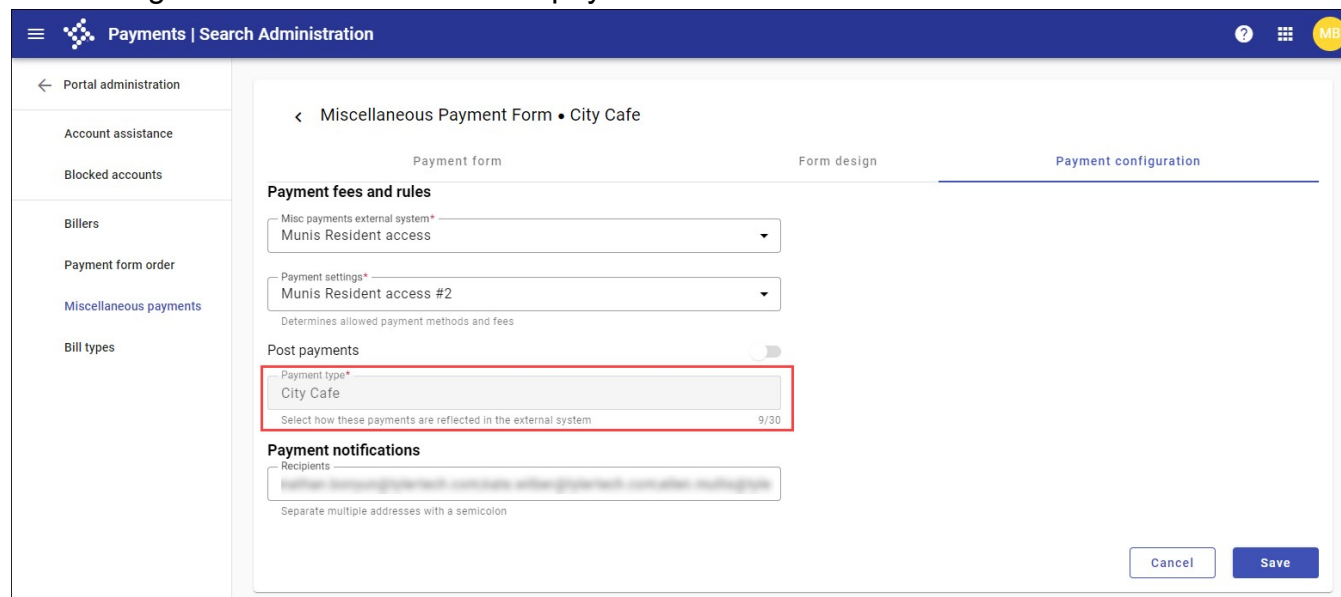
Systems provides the settings for defining this link.



Also in Portal Administration, selecting Search and Accounts Settings from the Payments sidebar options provides the Miscellaneous Payments option. Using the Add or Edit functions on this page, you can assign calculation methods, descriptions, and images for the payment type.



When you are adding or editing a payment form, the Payment Configuration tab of the Miscellaneous Payments option includes the Payment Type field that stores the Enterprise ERP charge code associated with the payments.



The screenshot shows the 'Payment configuration' tab for a 'Miscellaneous Payment Form • City Cafe'. The interface includes a sidebar with navigation options like 'Portal administration', 'Account assistance', and 'Miscellaneous payments'. The main content area is divided into three tabs: 'Payment form', 'Form design', and 'Payment configuration'. Under 'Payment configuration', there are sections for 'Payment fees and rules', 'Post payments', and 'Payment notifications'. The 'Payment type*' field is highlighted with a red box and contains the value 'City Cafe'. Below it, there is a note: 'Select how these payments are reflected in the external system' with a '9/30' value. At the bottom right, there are 'Cancel' and 'Save' buttons.

When payment settings have been configured, your Enterprise ERP users can use the Tyler Enterprise Payments interface to pay for miscellaneous receipt items. Once the payments are submitted, the Enterprise ERP Payment Entry program includes them in your organization's standard payment processes.

Over-Short Adjustment Process

2020.1

Jira Number: MUN-348988

Purpose: To allow organizations to write off entire balances at one time.

Estimated PACE Training Time: ½ day

Description: The Write-off Entire Charge checkbox is available. If selected, this option sets charges for single charge code to zero (0) using the write-off process.

When you select this option, the process ignores any paid or other amounts on the charge code. As a result, there may be a credit balance on the bill if the charge had been completely or partially paid. If necessary, refunds can then be issued for that balance.

Process Lockbox File

2020.1

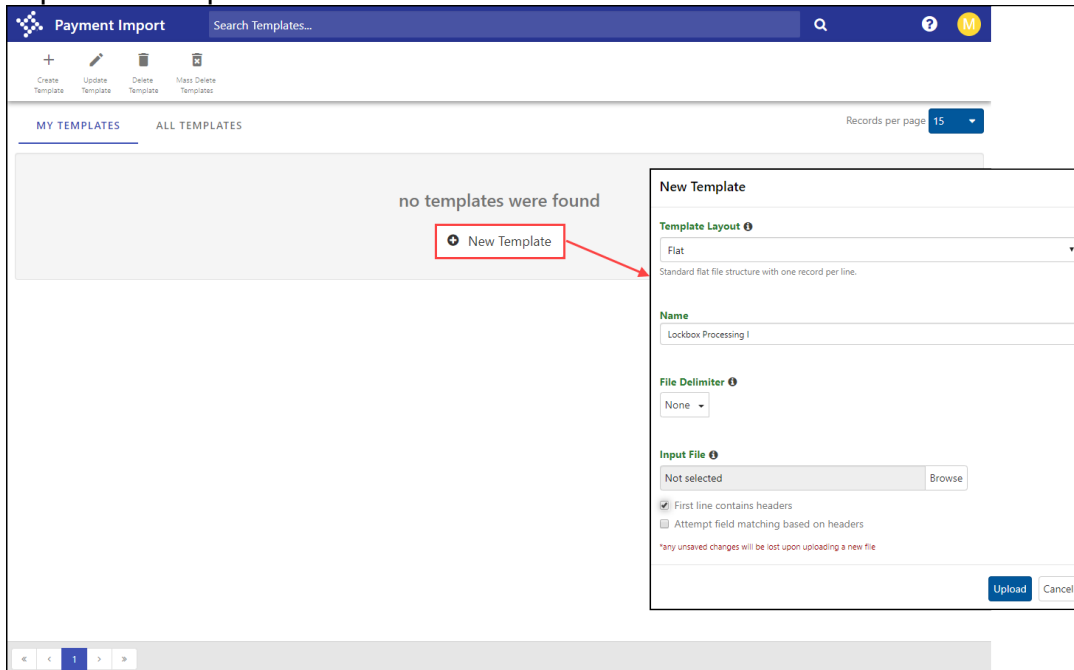
Jira Number: MUN-359400

Purpose: To provide custom formatting options for importing lockbox files.

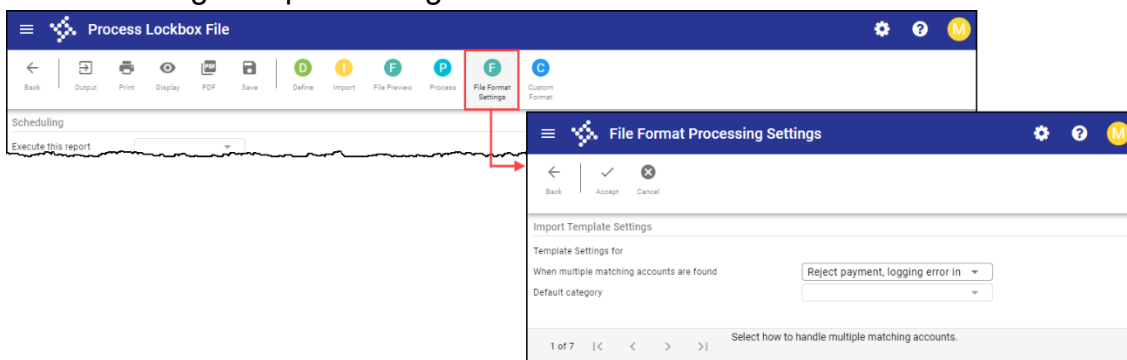
Estimated PACE Training Time: ½ day

Description: The Custom Format option is available for creating custom file layouts that provide file layouts for files to be imported according to a third-party collection agency’s specifications. Once created, the file is available for selection from the File Format list.

When you select Custom Format, the Payment Import screen provides options for creating the import file template.



In addition, the NACHA Settings option on the main screen is relabeled File Format Settings and the File Format Processing Settings screen is no longer specific to NACHA settings. This screen manages import settings for all files.



2021.4

Jira Number: MUN-421885

Purpose: To manage overpayments when multiple bills are processed.

Estimated PACE Training Time: Less than ½ day.

Description: The Overpayment Processing functionality in the Process Lockbox File program is expanded to include overpayment rejection functionality when multiple bill payments are processed.

If you have created a lockbox file for which the Overpayment Processing Method is set to Reject Payment but your lockbox file includes one or more payments that are greater than the unpaid amount due (including any penalties or interest), the program rejects the overpayments and creates an error report. When you view the error report, the rejected payments are identified.

BATCH 0002031:ERROR REPORT							
LOCKBOX CO. NAME: lockbox							
IMPORT FILE: e:\munisapps\INT_DEV\import\import_arpmtimp.124							
A/R BATCH: 2031							
LOCKBOX BILL BANK CD YEAR	BILL NUMBER	A/R CAT	CUSTOMER NUMBER	CUSTOMER NAME	PAYMENT AMOUNT	ERROR MESSAGE	LCKBX FILE BATCH SEQUENCE
		20	123	COLLINS, MAURICE J & 21.77-1-17	4,082.80	Settings prevent payment for more than unpaid balance.	3

The remaining payments in the file are successfully processed and are identified in the Payments Processed Report.

BATCH 0002031:PAYMENTS PROCESSED REPORT										
LOCKBOX CO. NAME: lockbox										
IMPORT FILE: e:\munisapps\INT_DEV\import\import_arpmtimp.124										
A/R BATCH: 2031										
BILL YEAR	BILL NUMBER	BILL TYPE	CUSTOMER NUMBER	CUSTOMER NAME	PROPERTY CODE	(B)ILL (A)CCT DATE	PAYMENT DATE	PAYMENT AMOUNT	LKBOX BATCH	LKBOX BANK
			122	CARPENTIER, DONALD W & 50 ALBANY MECHANICAL SERVIC	32.36-3-7	A	10/29/2021	8223.67		
					32.44-2-1.2	A	12/31/2020	10366.48		
TOTAL NUMBER OF PAYMENTS: 2										
TOTAL PAYMENT APPLIED: 18,590.15										

Special Conditions/Notes Import

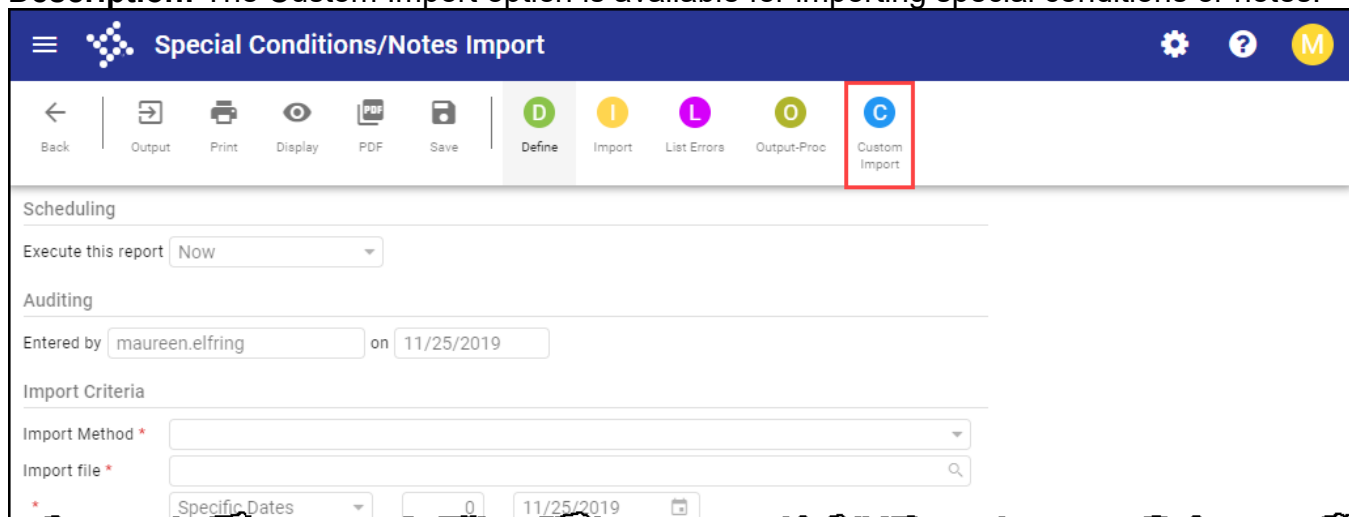
2020.1

Jira Number: MUN-321889

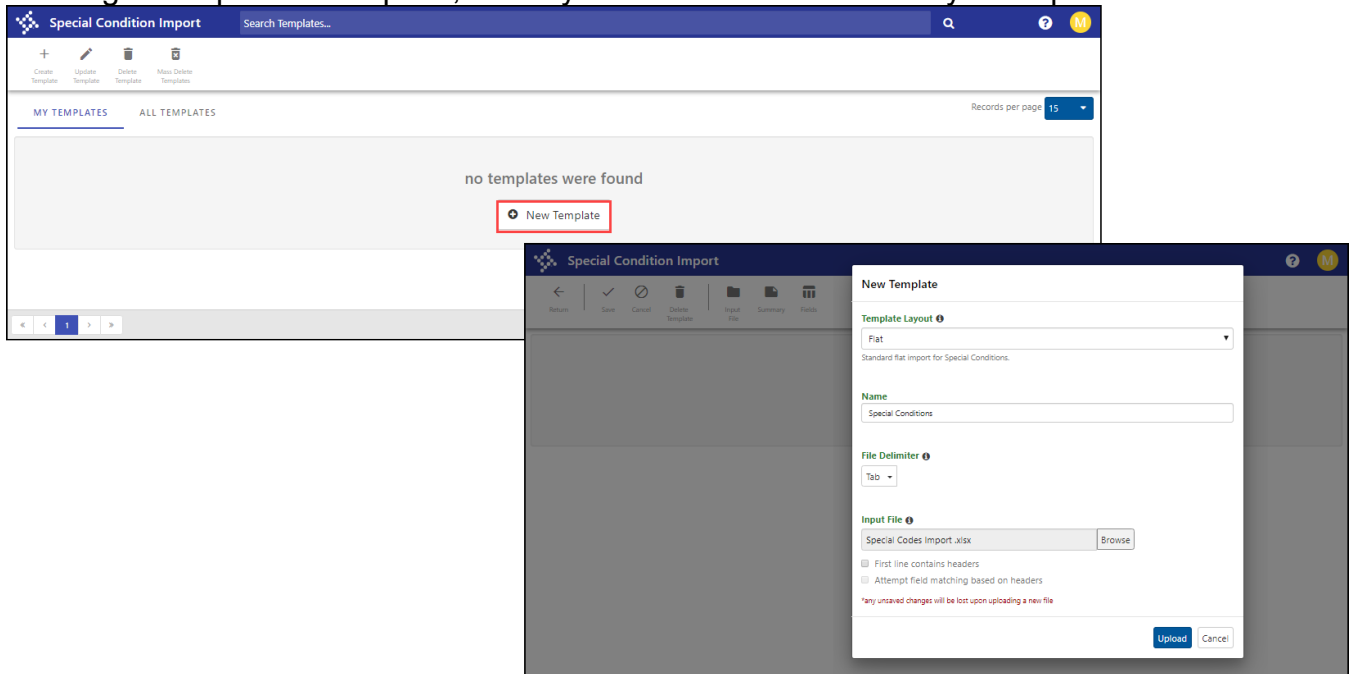
Purpose: To provide the option for customizing templates for importing special conditions or notes.

Estimated PACE Training Time: ½ day

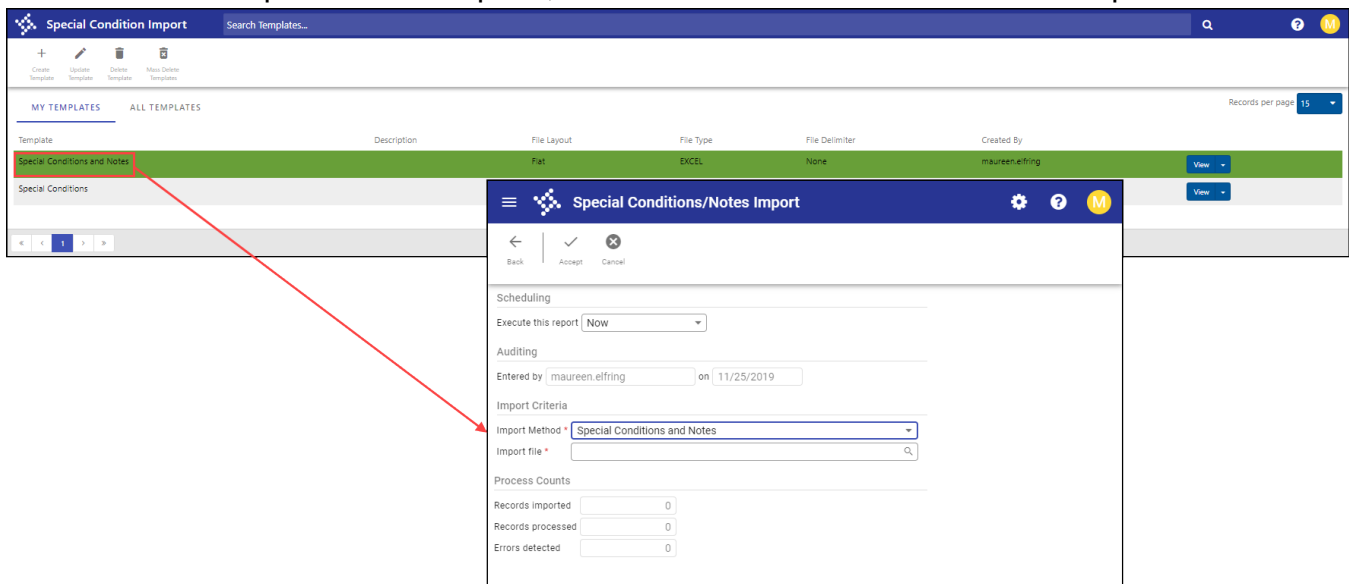
Description: The Custom Import option is available for importing special conditions or notes.



When you select Custom Imports, the Special Conditions Import screen provides options for creating the import file template, which you can then use to create your import file in Excel.



When the custom process is complete, the file is available for selection and import.



Transfer of Payments

2020.1

Jira Number: MUN-250133

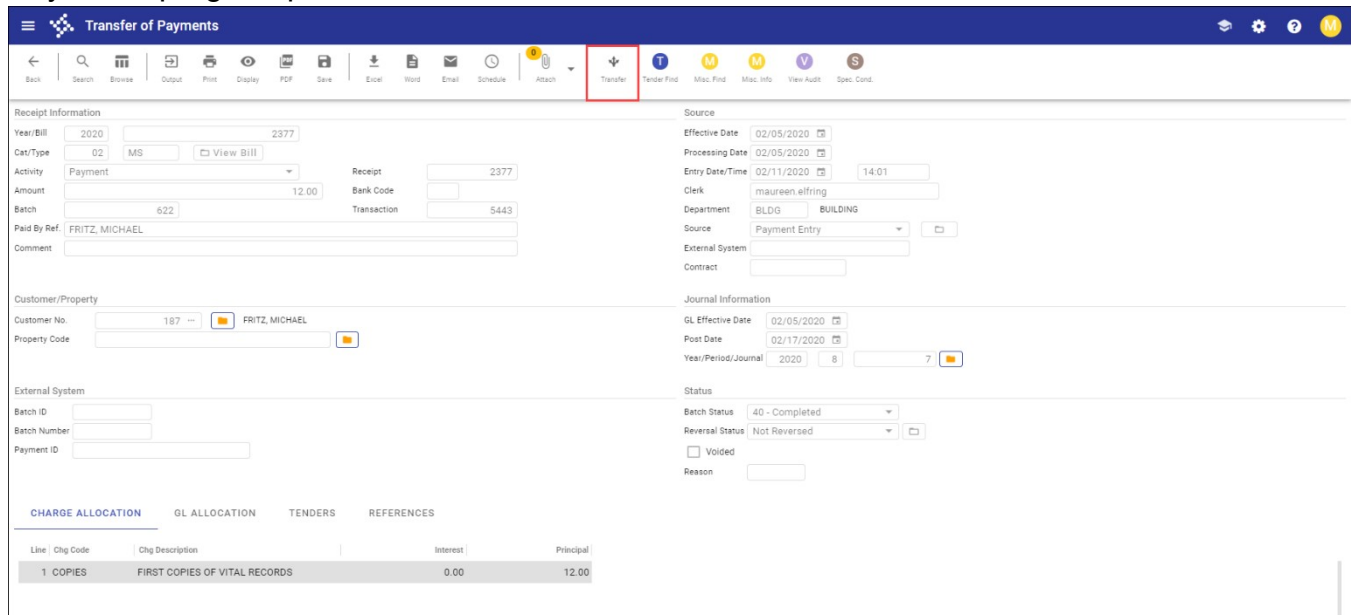
Purpose: To allow payment transfers from one bill to one or more other bills.

Enterprise ERP, *powered by* **Munis®**

Enterprise Revenue Management Major Enhancements 2020-2021

Estimated PACE Training Time: ½ day

Description: The Transfer of Payments program is available on the Payment Processing menu. This program, which uses batch processing, allows you to transfer payments from one bill to one or more other bills. For bills to be eligible for transfer, they must reside in a completed batch and not have been reversed or refunded. For eligible bills, the Transfer of Payments program provides the Transfer button in the toolbar.



The screenshot displays the 'Transfer of Payments' application window. The top toolbar contains various icons, with the 'Transfer' icon (a downward arrow) highlighted by a red box. Below the toolbar, the interface is divided into several sections:

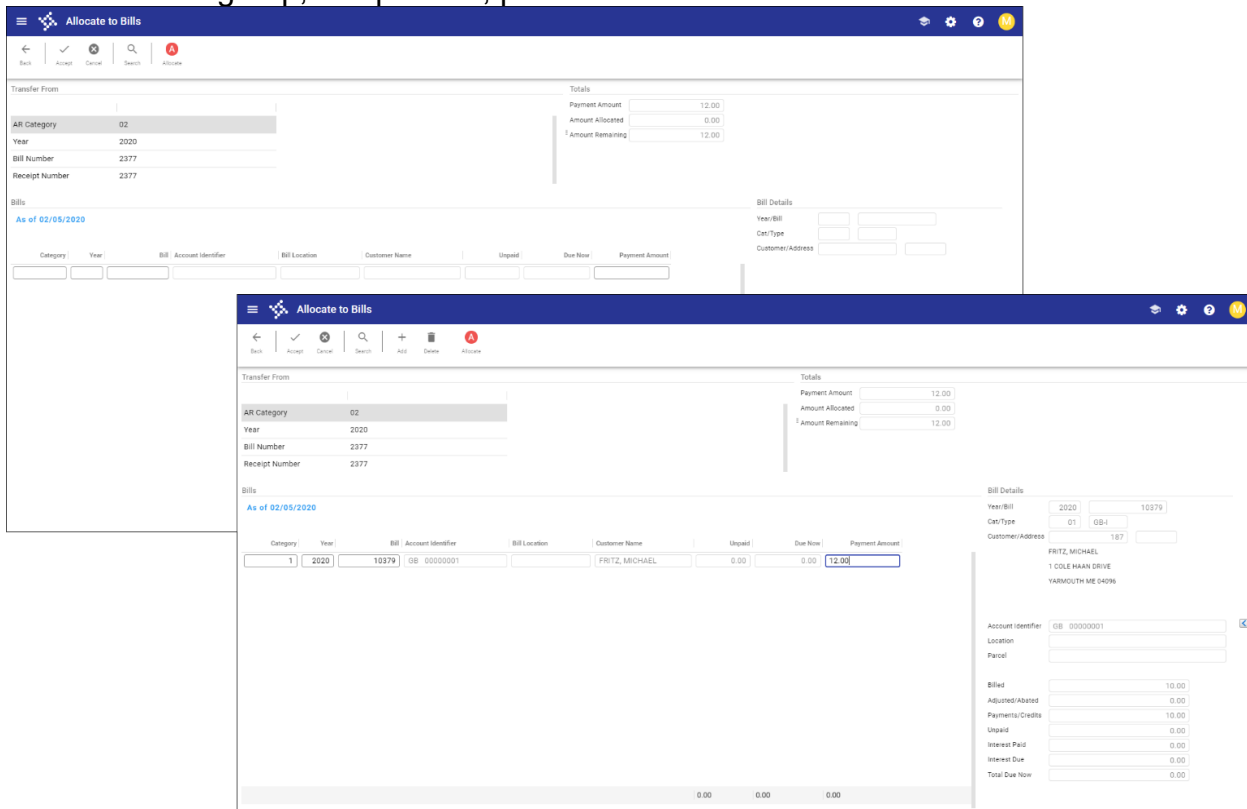
- Receipt Information:** Includes fields for Year/Bill (2020, 2377), Cat/Type (02, MS), Activity (Payment), Amount (12.00), Batch (622), and Paid By Ref. (FRITZ, MICHAEL).
- Source:** Includes Effective Date (02/05/2020), Processing Date (02/05/2020), Entry Date/Time (02/11/2020, 14:01), Clerk (maureen effring), Department (BLDG, BUILDING), and Source (Payment Entry).
- Customer/Property:** Includes Customer No. (187) and Property Code (FRITZ, MICHAEL).
- Journal Information:** Includes GL Effective Date (02/05/2020), Post Date (02/17/2020), and Year/Period/Journal (2020, 8, 7).
- Status:** Includes Batch Status (40 - Completed) and Reversal Status (Not Reversed).

At the bottom, there is a 'CHARGE ALLOCATION' table with the following data:

Line	Chg Code	Chg Description	Interest	Principal
1	COPIES	FIRST COPIES OF VITAL RECORDS	0.00	12.00

After selecting the Transfer button, the program provides the Allocate Bills screen when you can enter the details for the bill to which you are transferring the receipt. For each bill entered,

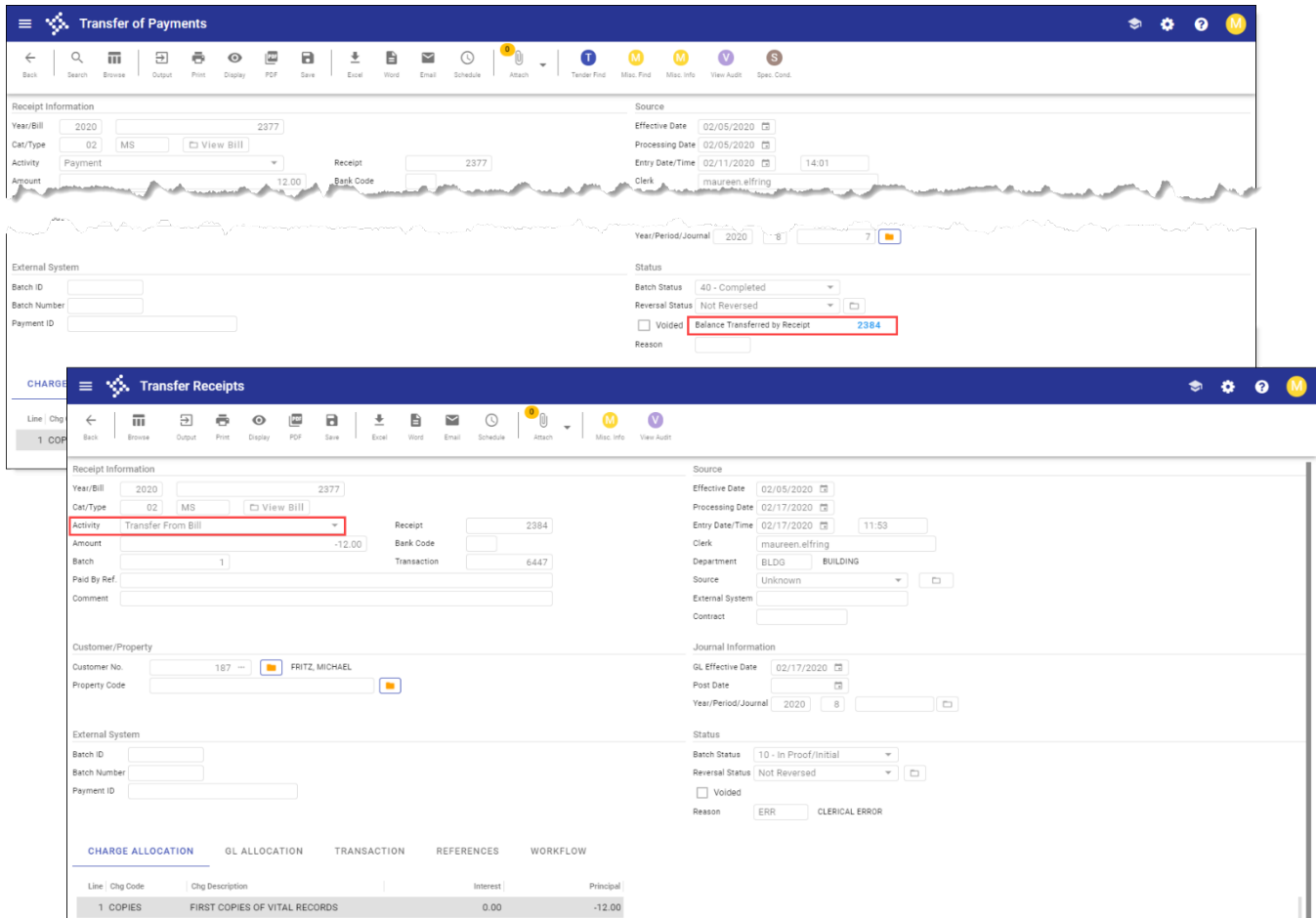
the Bill Details group, if expanded, provides the bill details.



The screenshot displays the 'Allocate to Bills' application interface. The top navigation bar includes a menu icon, the title 'Allocate to Bills', and utility icons for back, accept, cancel, search, add, delete, and allocate. Below the navigation bar, the interface is divided into several sections:

- Transfer From:** A form containing fields for AR Category (02), Year (2020), Bill Number (2377), and Receipt Number (2377).
- Totals:** A summary section showing Payment Amount (12.00), Amount Allocated (0.00), and Amount Remaining (12.00).
- Bills:** A table listing bills with columns for Category, Year, Bill Account Identifier, Bill Location, Customer Name, Unpaid, Due Now, and Payment Amount. The table shows one bill with Category 1, Year 2020, Bill Account Identifier 10379, Customer Name FRITZ, MICHAEL, and a Payment Amount of 12.00.
- Bill Details:** A section on the right that provides detailed information for the selected bill, including Year/Bill (2020/10379), Cat/Type (01/GB+), Customer/Address (FRITZ, MICHAEL, 1 COLEMAN DRIVE, YARMOUTH ME 04096), and various financial fields like Account Identifier, Location, Parcel, Billed, Adjusted/Abated, Payments/Credits, Unpaid, Interest Paid, and Total Due Now.

When you save the allocation changes, the program provides a processing payment confirmation message. When accepted, the program processes the transfer and refreshes the Transfer of Payments screen to display a receipt number link in the Status group. Clicking the receipt number displays the original bill on the Transfer Receipts screen with the Activity field displaying “Transfer from Bill” and the Amount field displaying a negative value for the amount of the transfer.



The top screenshot shows the 'Transfer of Payments' screen. The 'Receipt Information' section includes: Year/Bill (2020), Cat/Type (02 MS), Activity (Payment), Amount (12.00), Receipt (2377), Source, Effective Date (02/05/2020), Processing Date (02/05/2020), Entry Date/Time (02/11/2020 14:01), and Clerk (maureen.elfring). The 'Status' section shows Batch Status (40 - Completed), Reversal Status (Not Reversed), and a 'Balance Transferred by Receipt' of 2384.

The bottom screenshot shows the 'Transfer Receipts' screen. The 'Receipt Information' section includes: Year/Bill (2020), Cat/Type (02 MS), Activity (Transfer From Bill), Amount (-12.00), Receipt (2384), Batch (1), Transaction (6447), Source, Effective Date (02/05/2020), Processing Date (02/17/2020), Entry Date/Time (02/17/2020 11:53), and Clerk (maureen.elfring). The 'Status' section shows Batch Status (10 - In Proof/Initial), Reversal Status (Not Reversed), and Reason (ERR - CLERICAL ERROR). The 'Customer/Property' section shows Customer No. (187) and FRITZ, MICHAEL. The 'Journal Information' section shows GL Effective Date (02/17/2020) and Year/Period/Journal (2020 8).

At the bottom of the 'Transfer Receipts' screen, there is a table with the following data:

Line	Chg Code	Chg Description	Interest	Principal
1	COPIES	FIRST COPIES OF VITAL RECORDS	0.00	-12.00

For workflow, the TPA–Transfer of Payments Approval process code is available for creating business rules for transfer approvals. Approvals can be based on amounts, account receivable codes, or charge codes. If your organization uses workflow for transfer approvals, the Transfer Receipts screen includes the Workflow tab.

Business Licenses

Business License Settings

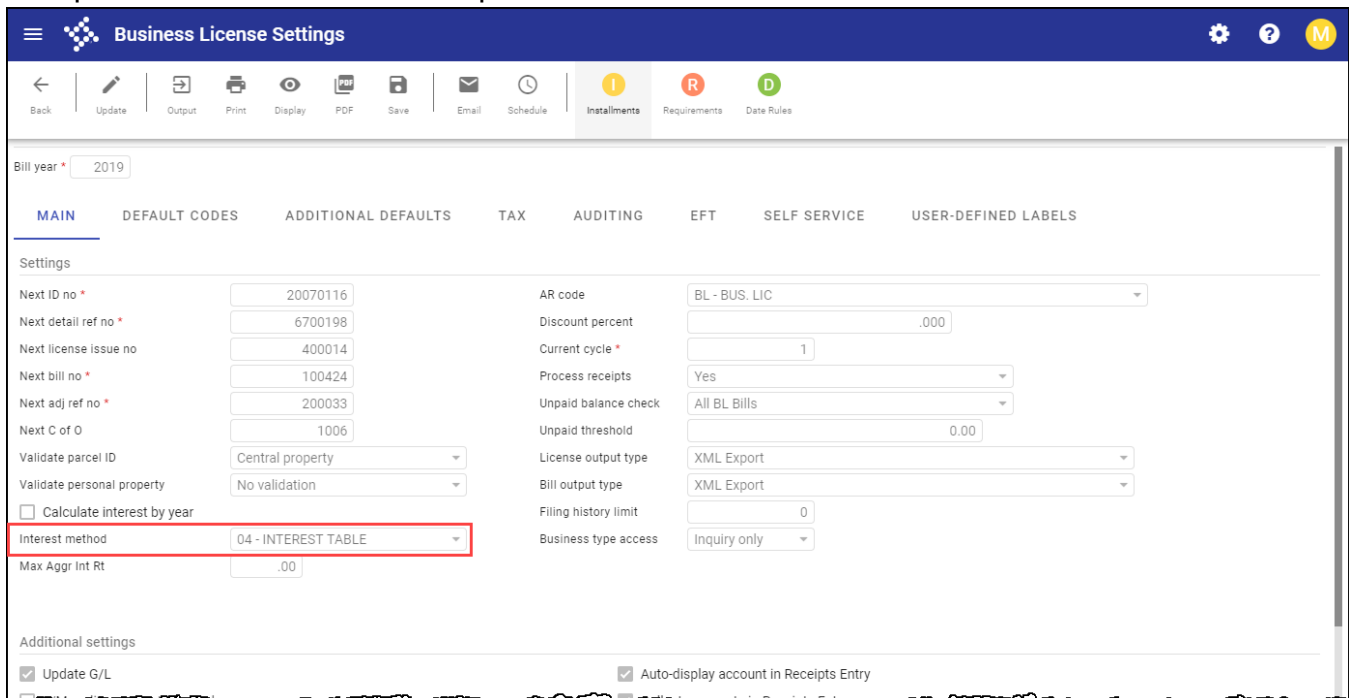
2020.1

Jira Number: MUN-338788

Purpose: To allow interest rate tables to be applied to Business License charge codes.

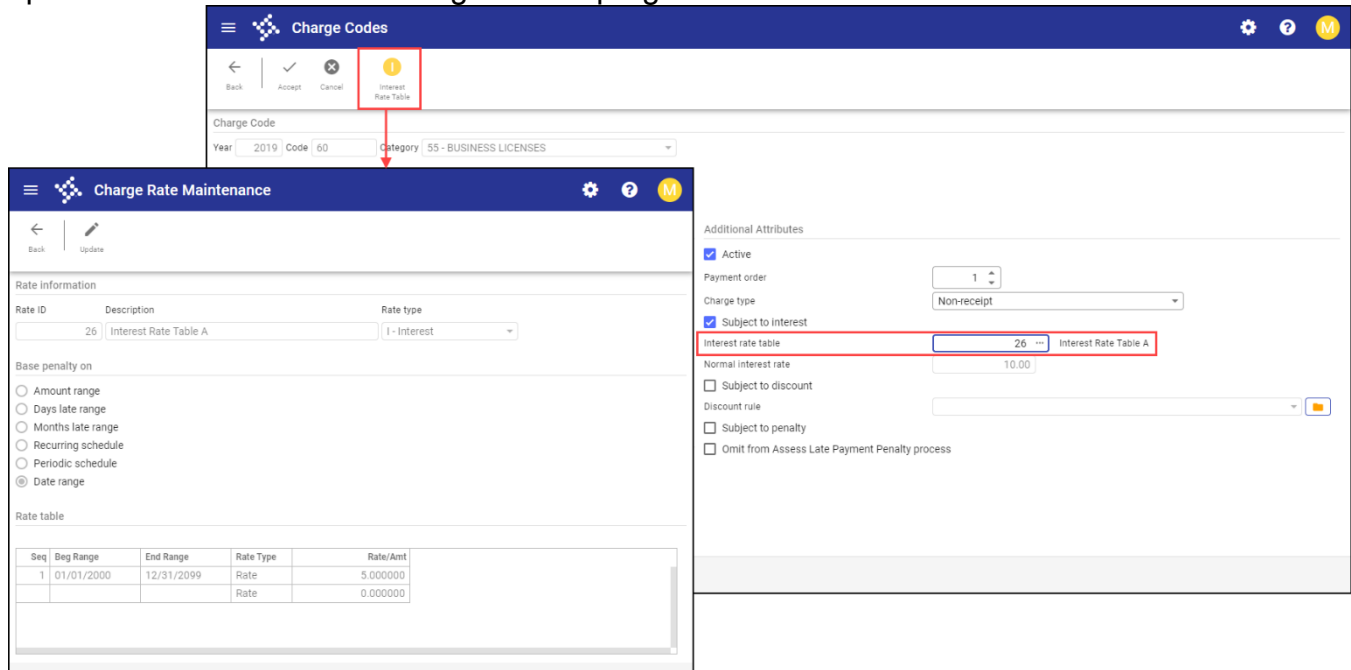
Estimated PACE Training Time: ½ day

Description: On the Installments screen of Business License Settings, the Interest Method field provides the Interest Table option.



The screenshot shows the 'Business License Settings' interface, specifically the 'Installments' tab. The 'Bill year' is set to 2019. The 'Interest method' dropdown menu is highlighted with a red box and contains the option '04 - INTEREST TABLE'. Other settings include 'Next ID no' (20070116), 'Next detail ref no' (6700198), 'Next license issue no' (400014), 'Next bill no' (100424), 'Next adj ref no' (200033), 'Next C of O' (1006), 'Validate parcel ID' (Central property), 'Validate personal property' (No validation), 'AR code' (BL - BUS. LIC), 'Discount percent' (.000), 'Current cycle' (1), 'Process receipts' (Yes), 'Unpaid balance check' (All BL Bills), 'Unpaid threshold' (0.00), 'License output type' (XML Export), 'Bill output type' (XML Export), 'Filing history limit' (0), and 'Business type access' (Inquiry only). The 'Additional settings' section includes 'Update G/L' and 'Auto-display account in Receipts Entry' (checked).

When this field is set to Interest Table, the Interest Rate Table field and the Interest Rate Table option are available in the Charge Codes program.



Using the Interest Rate Table option defines how interest is calculated. Once defined, you can use the Interest Rate Table field to specify the rate table to apply when the selected charge code is associated with Business License procedures.

Business License Settings, Business Types, Business Accounts, Print Business Licenses

2020.2

Jira Number: MUN-369005, MUN-376324, MUN-331707

Purpose: To process business licenses at the account level.

Estimated PACE Training Time: Less than ½ day

Description: To enable business license processing at the account level, several fields have been added to Business License programs.

In Business Accounts, on the Business Info tab, the Mail To field is available. When you complete the Mail To field, the mail-to settings are drawn from the business account record and not from a specific license or tax record.

Business Accounts

Account ID: 20070116
 DBA: FRITZ, MICHAEL
 Status: NEW
 Municipality: PALM - FALMOUTH
 Area: ...
 Type: SOLE PROPRIETORSHIP
 Square Feet: ...
 Last maint: 06/12/2020 By: maureen.elfring
 Last audit: ...
 Assoc business: ...

BUSINESS INFO | NAICS/SIC | CONTACT INFO | TEXT/COMMENTS | OTHER | FACILITY | USER DEFINED

Business Owner: 187
 DBA: FRITZ, MICHAEL
 License CIDs: ...
 R/E Owner: DBA ADDRESS (1)
 Agent/Operator: REAL ESTATE OWNER
 Other CID: AGENT/OPERATOR
 Mail to: OTHER

SSN/FID: ...
 Local ID: ...
 State ID: ...
 C of O: ...
 Fiscal Month/Dates: 1
 Insurance: ...
 Bus Start/Close: 06/12/2020
 Lease End: ...
 Bankruptcy: ...
 Last License: ...
 Filing history limit: 0
 Allow account update in BL Self Service

0 of 0 | CID responsible for this account, overrides the license/tax Mail to.

When you export business account records, the Office Export dialog box for Mail-to Addresses includes the Determined by the Mail-to Setting option. When selected, the export process uses the Mail-to value assigned at the account level, not at the license or tax level.

Office Export

Mail to Addresses

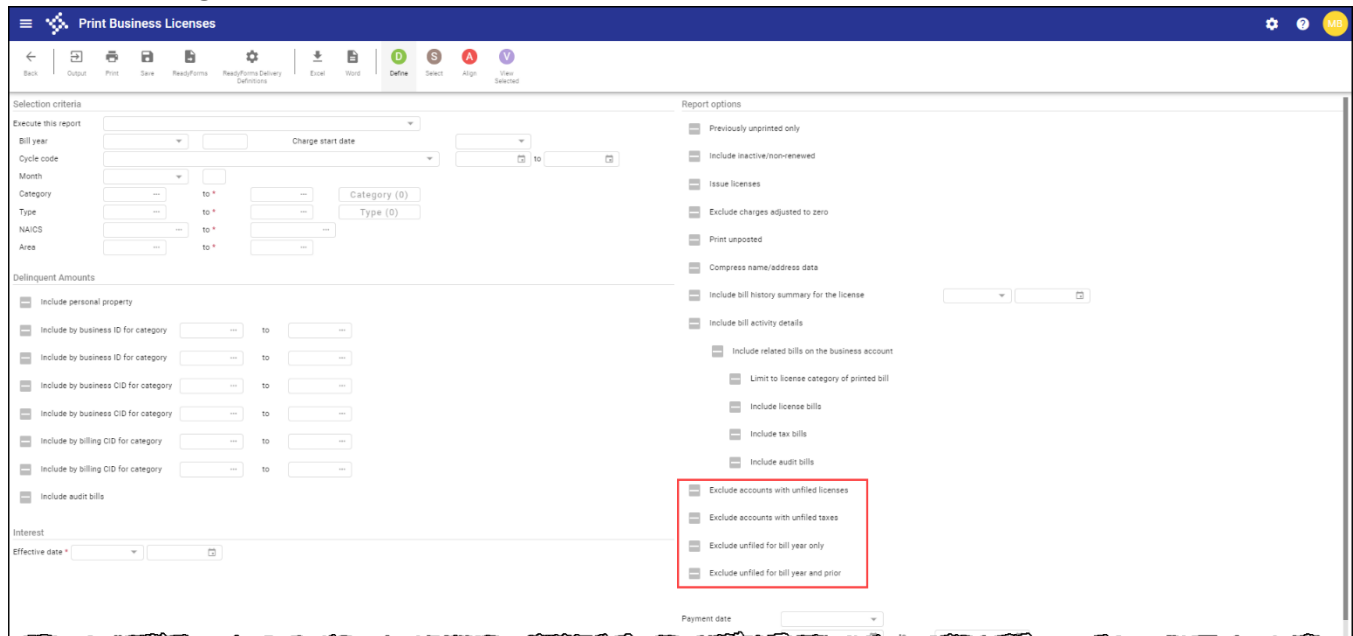
Select the mail-to addresses to use for the office export.
 An export record will be created for each mail-to address.

Determined by the mail-to setting
 Business owner
 Agent/operator
 Real estate owner
 Other owner

Data Selection

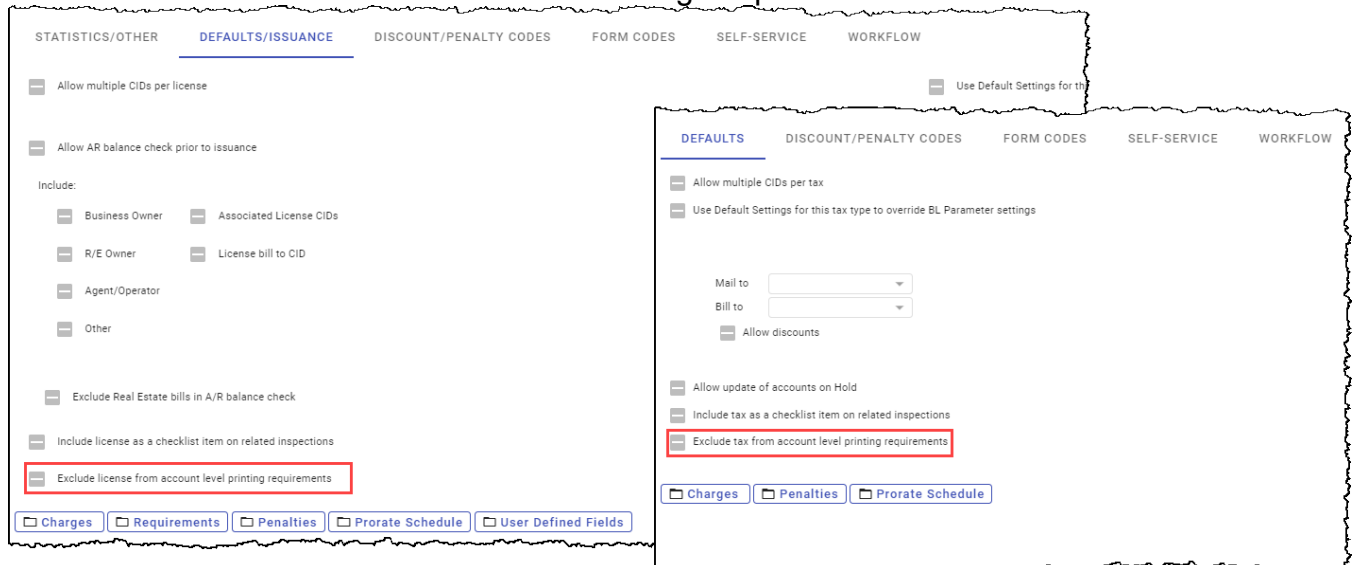
The Print Business Licenses program for Licenses and Tax includes the Exclude Accounts with Unfiled Licenses, Exclude Accounts with Unfiled Taxes, Exclude Unfiled for Bill Year Only,

and Exclude Unfiled for Bill Year and Prior checkboxes.



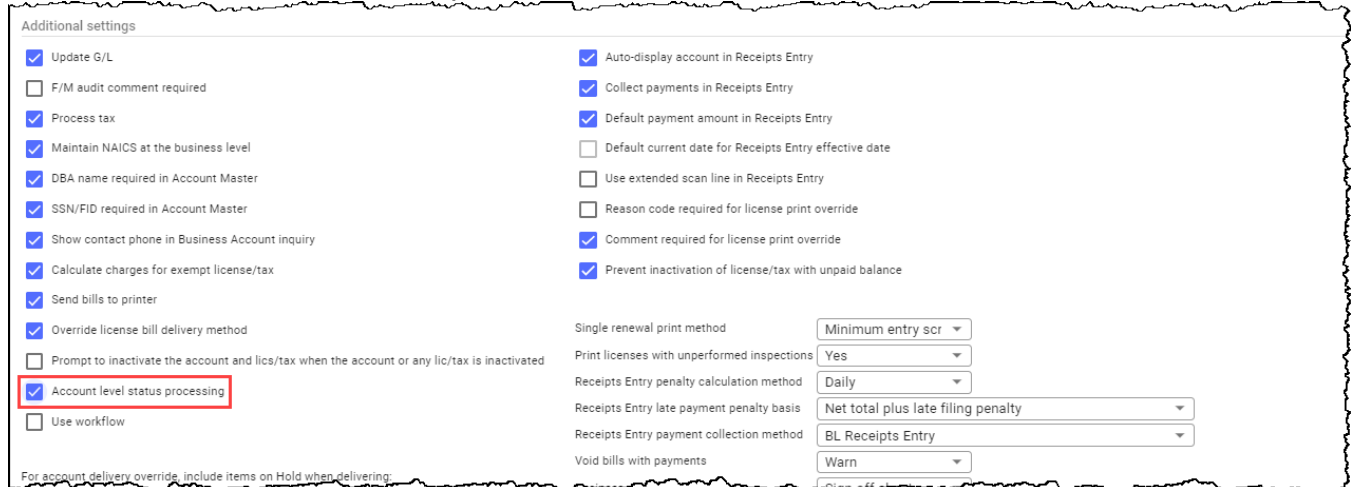
These checkboxes direct that accounts be excluded from printing if they include unfiled licenses, unfiled taxes, or both. The accounts can further be restricted from printing if the licenses or taxes are unfiled for the current bill year only or the current and prior bill years.

In Business Types, on the Defaults/Issuance tab for Licenses and the Defaults tab for Taxes, the Exclude License from Account Level Printing Requirements field is available.

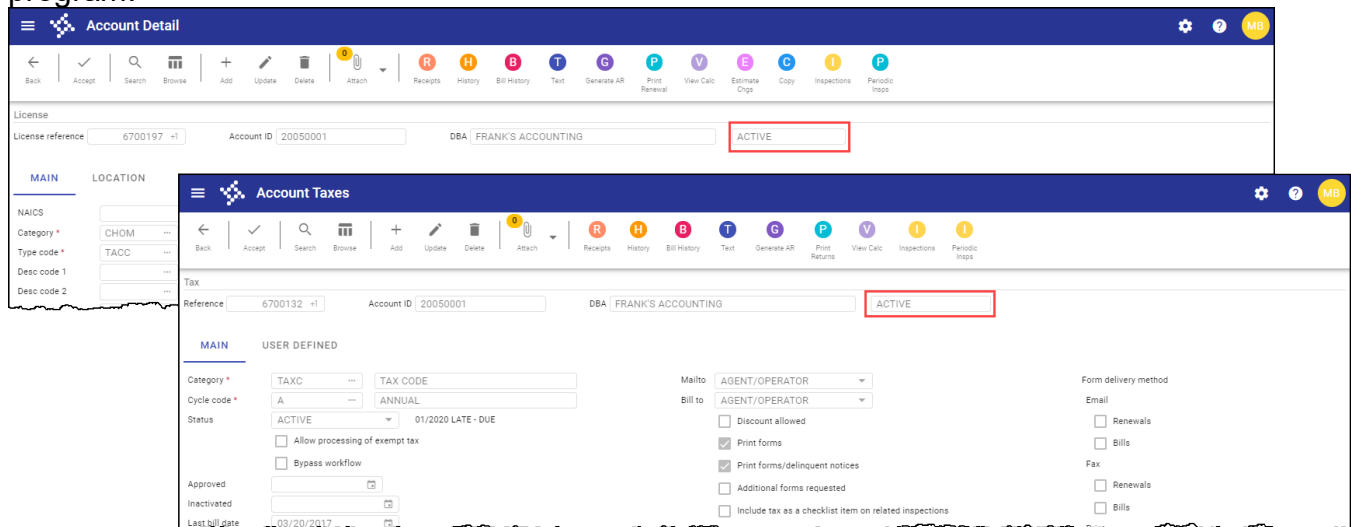


When this field is selected, taxes and licenses for this business type are excluded from account level printing requirements.

In Business License Settings, the Account Level Status Processing setting directs that the Business Account status takes precedence over the Tax and License status for records.



When this setting is enabled, the business account's status is displayed on the Account Detail screen for Licenses and on the Account Taxes screen for Taxes in the Business Accounts program.



Business License Settings, Print Business Licenses

2021.1

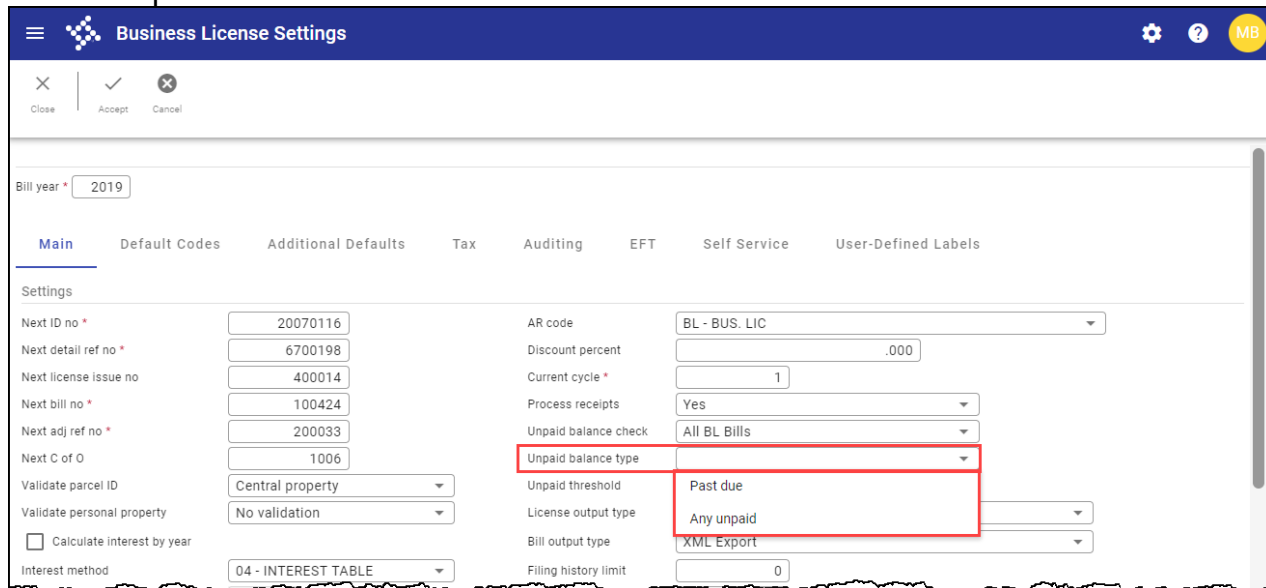
Jira Number: MUN-344648

Purpose: To define the balance types that apply to an unpaid balance threshold.

Estimated PACE Training Time: Less than ½ day.

Description: In Business License Settings, the Unpaid Balance Type list determines whether all unpaid balances or only past due balances are used when counting against the business

license unpaid balance threshold.



The screenshot shows the 'Business License Settings' interface. The 'Unpaid balance type' dropdown menu is open, showing 'Past due' as the selected option. Other visible settings include: Next ID no * (20070116), Next detail ref no * (6700198), Next license issue no (400014), Next bill no * (100424), Next adj ref no * (200033), Next C of O (1006), Validate parcel ID (Central property), Validate personal property (No validation), Calculate interest by year (unchecked), Interest method (04 - INTEREST TABLE), AR code (BL - BUS. LIC), Discount percent (.000), Current cycle * (1), Process receipts (Yes), Unpaid balance check (All BL Bills), Unpaid threshold (Past due), License output type (Any unpaid), Bill output type (XML Export), and Filing history limit (0).

The Print Business Licenses program uses the Unpaid Balance Type setting when determining whether to retrieve any unpaid balances or delinquent balances. As unpaid balances may include bills not yet due, selecting Past Due causes Print Business Licenses to include licenses for any bill that has not reached or exceeded its due date.

Business Types, Business Accounts

2020.1

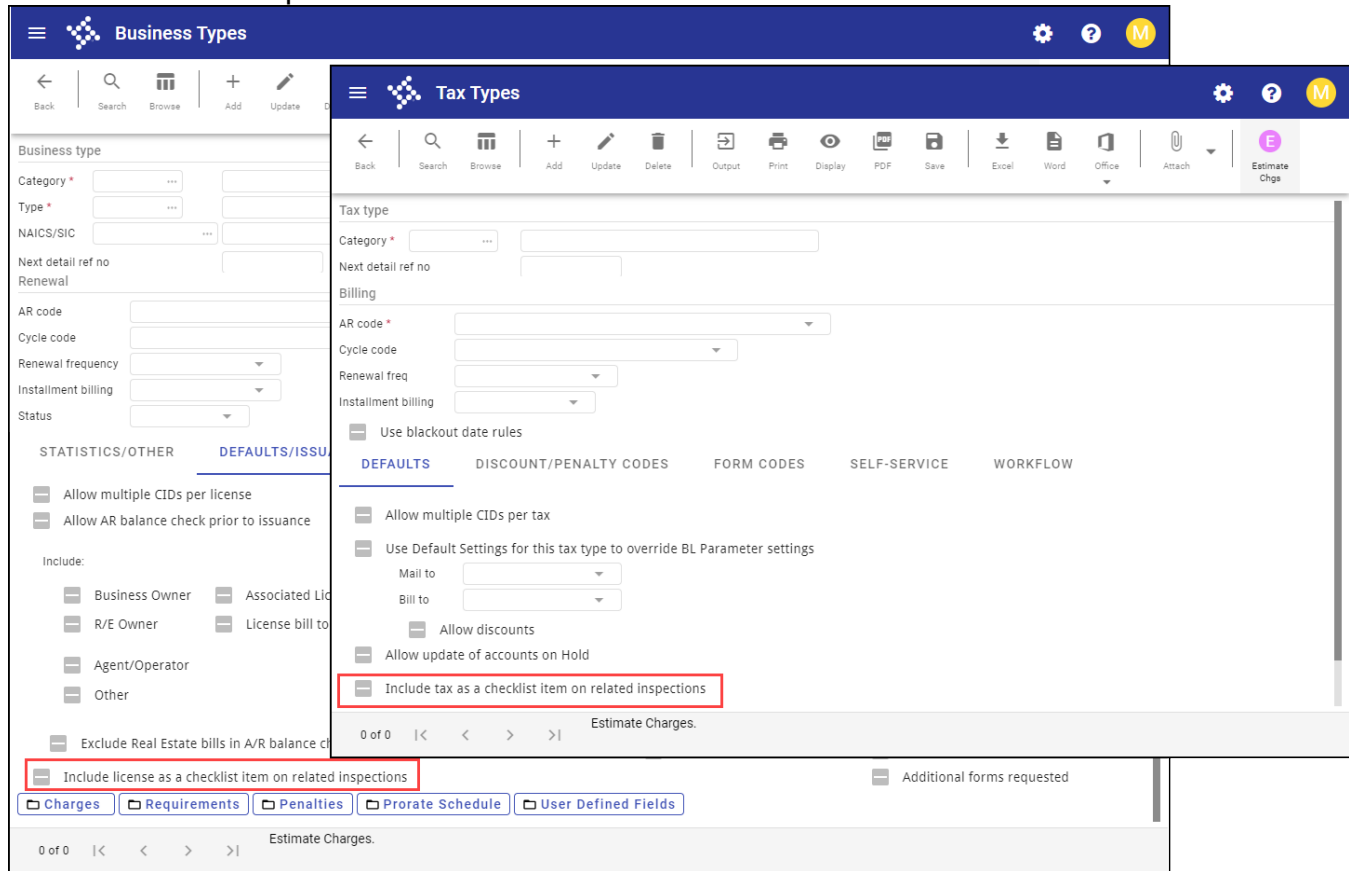
Jira Number: MUN-335482

Purpose: To link business accounts to permit inspections.

Estimated PACE Training Time: ½ day

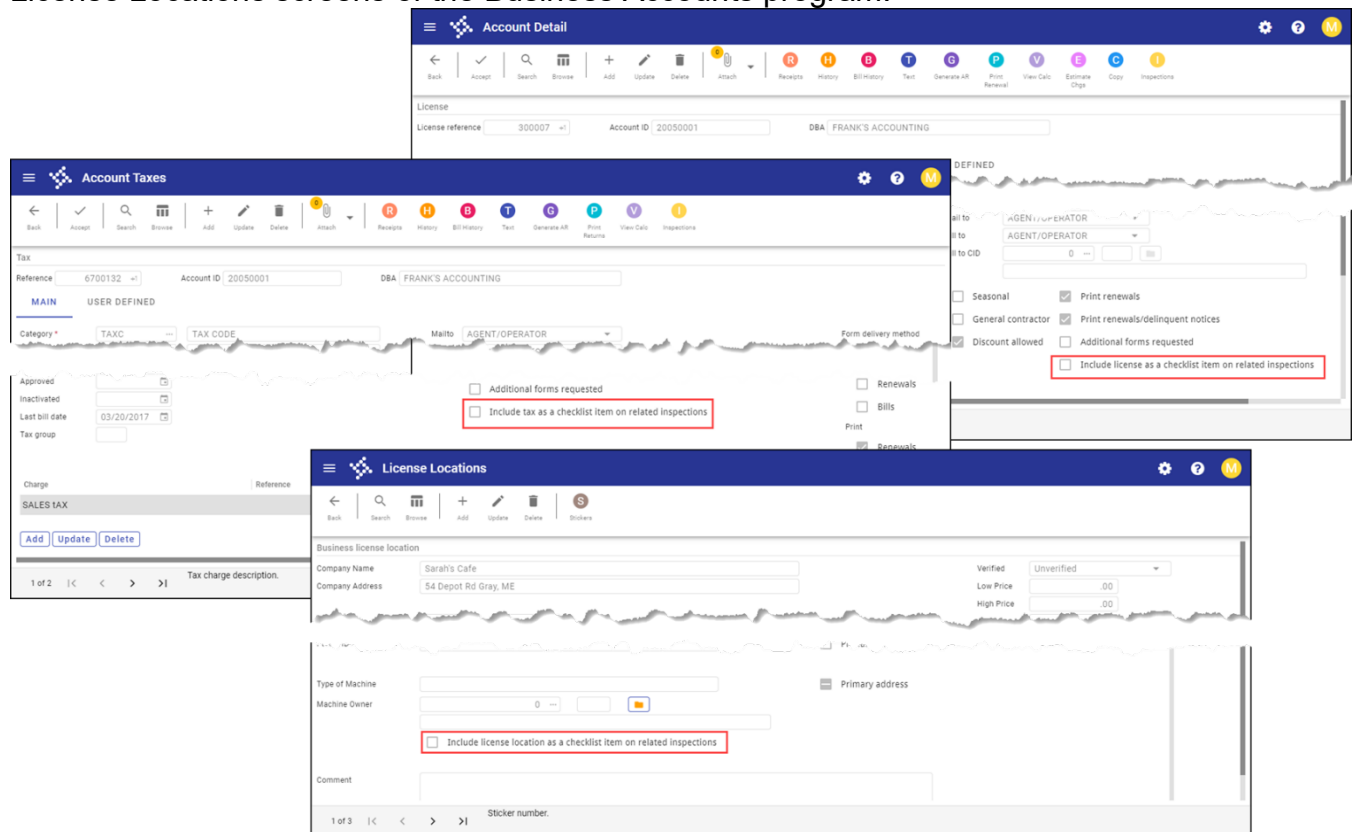
Description: Business Licenses customers who also use Permits & Code Enforcement can link an inspection to a business type, a business license or tax, or a business license location when adding or updating an inspection.

The Business Types and Tax Types programs include the Include License/Tax as a Checklist Item on Related Inspections checkbox.



When this checkbox is selected, business accounts with the associated business or tax type are included in inspection checklists.

This checkbox is also included on the Licenses Account Detail, Account Taxes, and the License Locations screens of the Business Accounts program.



When this checkbox is selected, inspection checklists associated with the associated business accounts include Licenses or Taxes as a checklist item.

General Billing

Loans

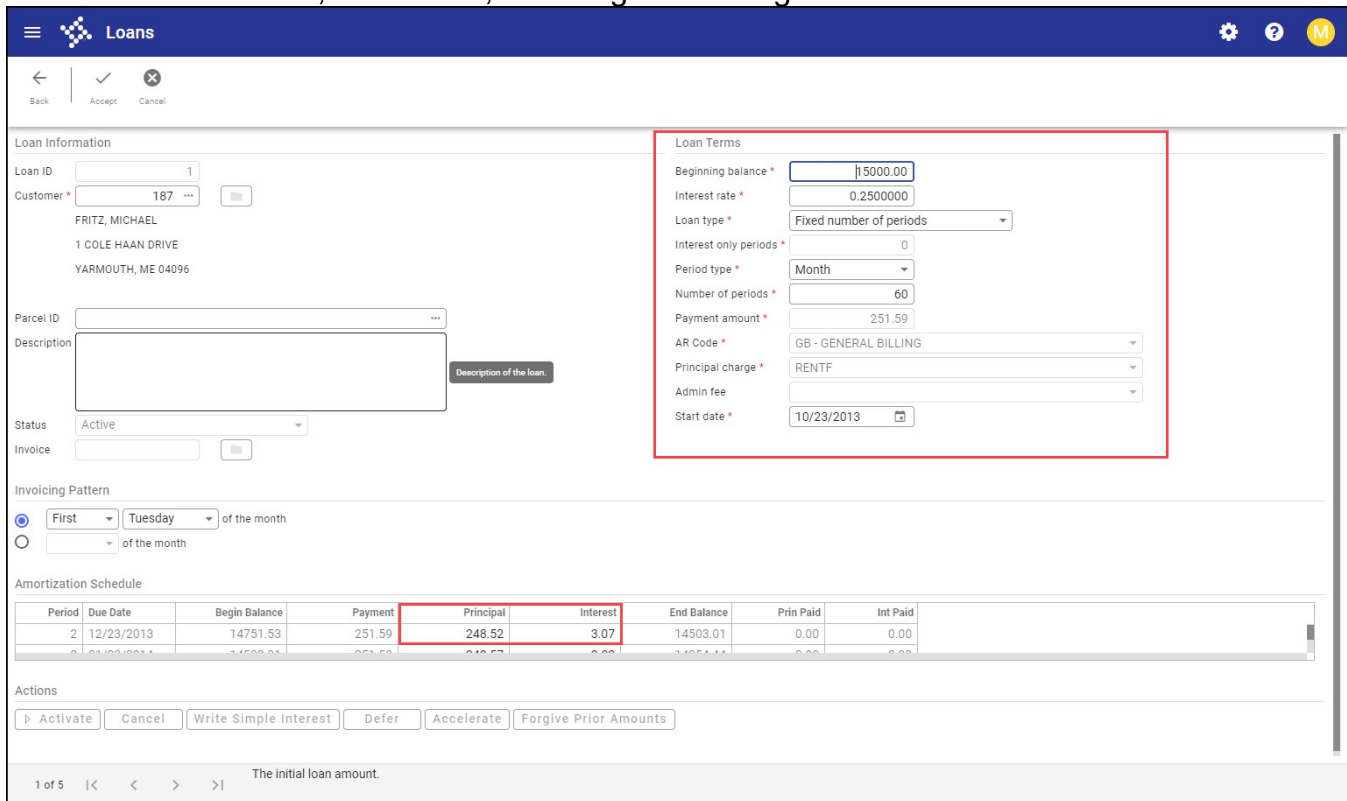
2020.1

Jira Numbers: MUN-325904, MUN-303358, MUN-316863

Purpose: To permit term and period amount updates for existing loans, to support multi-installment loan processing, and to maintain loans with zero percent interest.

Estimated PACE Training Time: ½ day

Description: In the Loans program, clicking the Update button for a current loan record makes the loan terms and period amounts fields available for update. Changes update the amortization schedule, as needed, including overwriting custom balances.



The screenshot shows the 'Loans' program interface. The 'Loan Information' section includes fields for Loan ID (1), Customer (FRITZ, MICHAEL), and Address (1 COLE HAAN DRIVE, YARMOUTH, ME 04096). The 'Loan Terms' section, highlighted with a red box, includes fields for Beginning balance (15000.00), Interest rate (0.2500000), Loan type (Fixed number of periods), Interest only periods (0), Period type (Month), Number of periods (60), Payment amount (251.59), AR Code (GB - GENERAL BILLING), Principal charge (RENTF), Admin fee, and Start date (10/23/2013). The 'Amortization Schedule' table shows the following data:

Period	Due Date	Begin Balance	Payment	Principal	Interest	End Balance	Prin Paid	Int Paid
2	12/23/2013	14751.53	251.59	248.52	3.07	14503.01	0.00	0.00

The 'Actions' section includes buttons for Activate, Cancel, Write Simple Interest, Defer, Accelerate, and Forgive Prior Amounts. The footer indicates '1 of 5' and 'The initial loan amount.'

The Loans program supports multi-installment loans. When you create a multi-installment loan and then activate it, the Loans program creates a multi-installment invoice with each installment representing periods of pay and with calculated interest included.

Loan Information

Loan ID: 6
Customer: FRITZ, MICHAEL
1 COLE HAAN DRIVE
YARMOUTH, ME 04096

Loan Terms

Beginning balance: 5000.00
Interest rate: 0.250000
Loan type: Fixed number of periods

Bill Inquiry: Single Bill View

Bill Information

Year	Category	Number	AR Code	Bill Type
2020	GB-GB	10370	GB	I

Customer Information

Customer ID: 187
FRITZ, MICHAEL
1 COLE HAAN DRIVE
YARMOUTH, ME 04096
207-878-9999

Property Information

Parcel ID: 99999
GB Acct #: 999.99
Prop Loc:

Amortization Schedule

Period	Due Date	Begin Balance	Payment
1	01/02/2020	5000.00	139.44
2	02/02/2020	4861.62	139.44
3	03/02/2020	4723.24	139.44

INSTALLMENTS

Installment	Bill Date	Due Date	Interest Date	Penalty Date	Billed	Adjustments	Abatements	A/R(A)	Paid	Discount	Refunds	Write-offs	Print
1	12/02/2019	01/02/2020	12/02/2019		138.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
2	12/02/2019	02/02/2020	01/02/2020		138.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
3	12/02/2019	03/02/2020	02/02/2020		138.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Totals:					5,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0

Multi-installment loans are processed through batches. When you release and post the batch, the Status and Invoice fields update to reflect an active loan and to provide the invoice number for the loan.

For existing loans, the Create Invoices option allows you to create multi-installments for the remaining balance.

Loans

Back Search Browse Add Update Delete Output Print Display PDF Save Excel Word Email Schedule Attach **C** Create Invoice XML Output Loan Report User Def

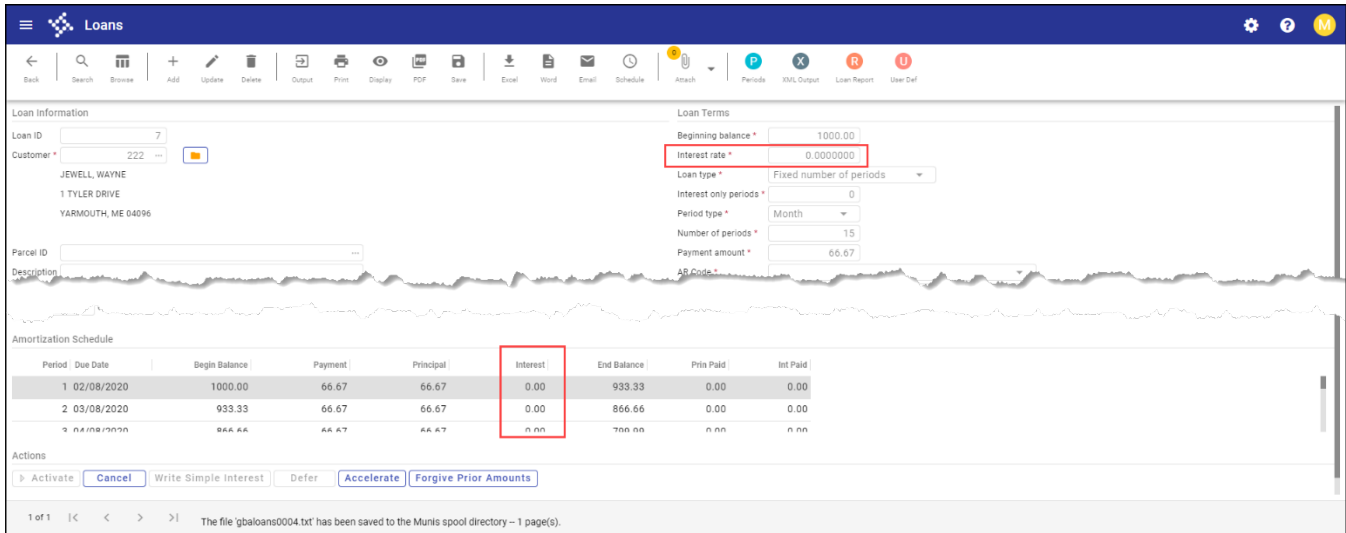
Loan Information

Loan ID: 2
Customer: FRITZ, MICHAEL
1 COLE HAAN DRIVE
YARMOUTH, ME 04096

Loan Terms

Beginning balance: 25000.00
Interest rate: 1.250000
Loan type: Fixed number of periods
Interest only periods: 0
Period type: Month

The Loans program also accepts and processes loans with 0% interest. In this case, no interest amounts are generated for the expected amortization schedule.



The screenshot shows the 'Loans' application interface. On the left, 'Loan Information' includes Loan ID 7, Customer JEWELL, WAYNE, and address 1 TYLER DRIVE, YARMOUTH, ME 04096. On the right, 'Loan Terms' shows a beginning balance of 1000.00, an interest rate of 0.0000000 (highlighted with a red box), and a payment amount of 66.67. Below is an 'Amortization Schedule' table:

Period	Due Date	Begin Balance	Payment	Principal	Interest	End Balance	Prin Paid	Int Paid
1	02/08/2020	1000.00	66.67	66.67	0.00	933.33	0.00	0.00
2	03/08/2020	933.33	66.67	66.67	0.00	866.66	0.00	0.00
3	04/08/2020	866.66	66.67	66.67	0.00	799.99	0.00	0.00

At the bottom, there are 'Actions' buttons: Activate, Cancel, Write Simple Interest, Defer, Accelerate, and Forgive Prior Amounts. A status bar at the very bottom indicates 'The file 'gbaloans0004.txt' has been saved to the Munis spool directory - 1 page(s)'.

Quick Entry Invoices

2020.2

Jira Number: MUN-367711

Purpose: To provide a quick-entry process for creating a general billing invoice from multiple applications. For 2020.2, Quick Entry Invoices will be accessible as a General Billing menu option (*Enterprise ERP > General Revenues > General Billing > Invoice Processing > Quick Entry Invoices*) and in future Hub releases, it will be accessible from data tables in Accounts Receivable cards.

Estimated PACE Training Time: Less than ½ day

Description: General Billing Quick Entry Invoices provides an abbreviated invoice entry solution for General Billing. Using the Quick Entry option, you can create a batch and add invoices to the new batch or you can add invoices to an existing batch.



The screenshot shows a dialog box titled 'Quick Entry Invoices'. It contains two buttons: 'Start New Batch' and 'Resume Batch'. A 'Cancel' button is located at the bottom right of the dialog box.

According to your selection, the program provides the Create New Batch screen or the My Batches screen, which provides a list of your existing batches with the Resume Batch option for each.

Quick Entry Invoices

Create New Batch ×

Default Effective Date

Default Invoice Date

Quick Entry Invoices

My Batches

Batch Number	Invoice Count	Batch Total	
90011348	4	\$150.00	<input type="button" value="Resume Batch"/>
90011349	2	\$200.00	<input type="button" value="Resume Batch"/>
90011354	2	\$20.00	<input type="button" value="Resume Batch"/>
90011362	2	\$700.00	<input type="button" value="Resume Batch"/>

For either option, the program provides the Create Invoice screen.

Quick Entry Invoices

Batch 90011348 | Create Invoice ×

Year Period

Customer

Invoice Number

Use Next Invoice Number

ARCode

Invoice Date

Parcel

Department

For/Location

Invoice Total

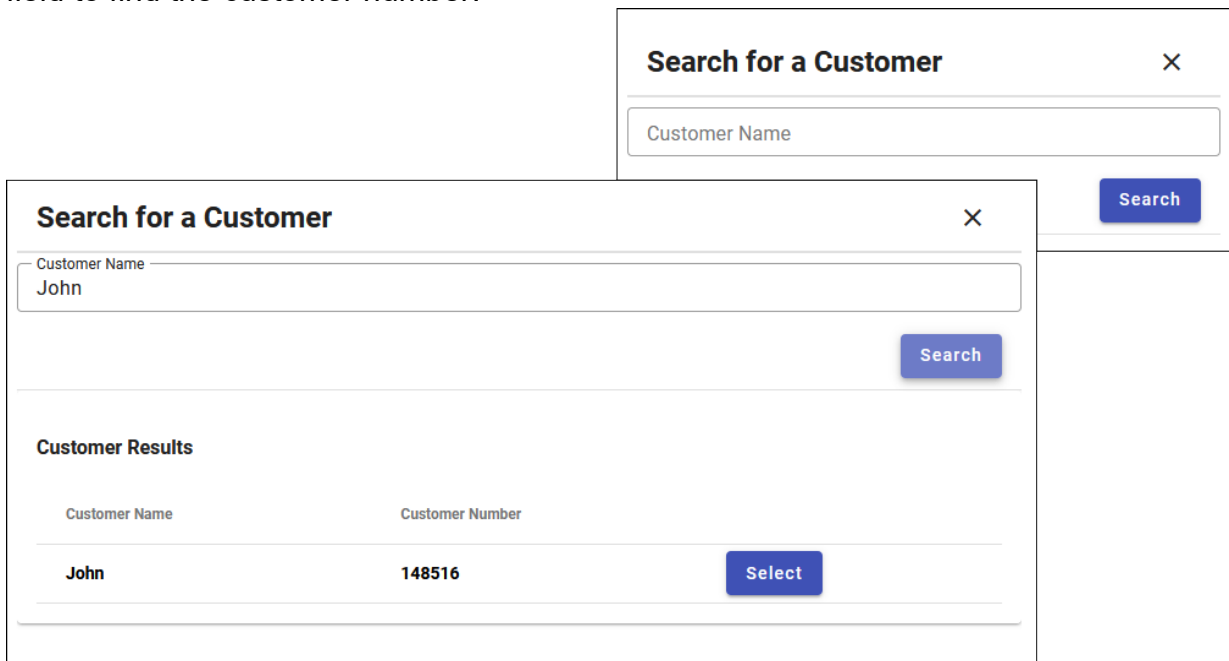
Batch Total

Charges

Charge Code	Qty	Total	
1	1	\$0.00	<input type="button" value="✎"/> <input type="button" value="✕"/>

Rows per page: 5 1 - 1 of 1

As you complete the Create Invoice screen, you can use the Search feature in the Customer field to find the customer number.



Search for a Customer [X]

Customer Name

Customer Name: John

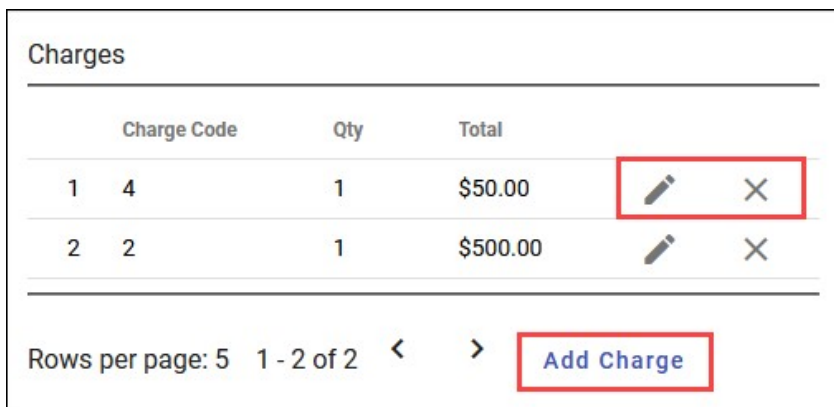
[Search]

Customer Results

Customer Name	Customer Number
John	148516

[Select]

In the Charges group, the Add Charge option adds charges to an invoice. Once you have added charges, you can use the Edit button to update the charge as necessary or the Delete button to remove a charge.

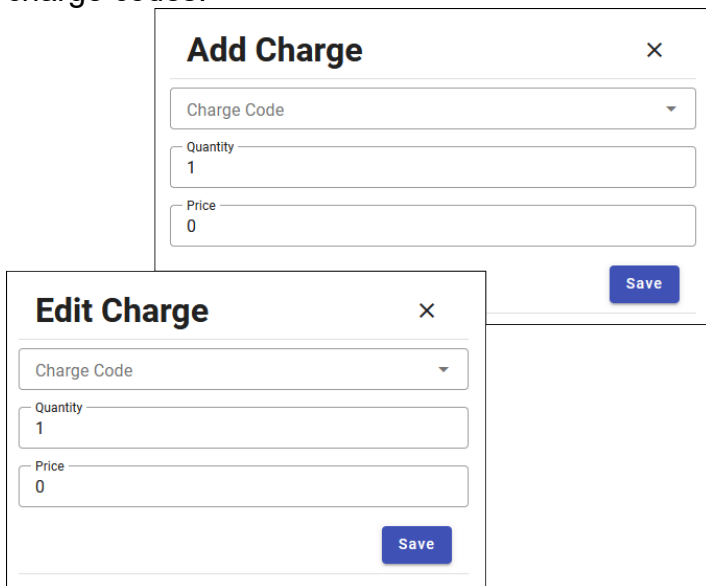


Charges

	Charge Code	Qty	Total		
1	4	1	\$50.00	[Edit]	[Delete]
2	2	1	\$500.00	[Edit]	[Delete]

Rows per page: 5 1 - 2 of 2 < > [Add Charge]

When you are adding or editing charges, the Charge Code list provides the list of available charge codes.



Clicking Save for a completed invoice provides a confirmation message.

You have successfully added this Invoice to the batch

[Back](#)
[Post Batch](#)
[Create another invoice](#)
[Done](#)

Recurring Invoices

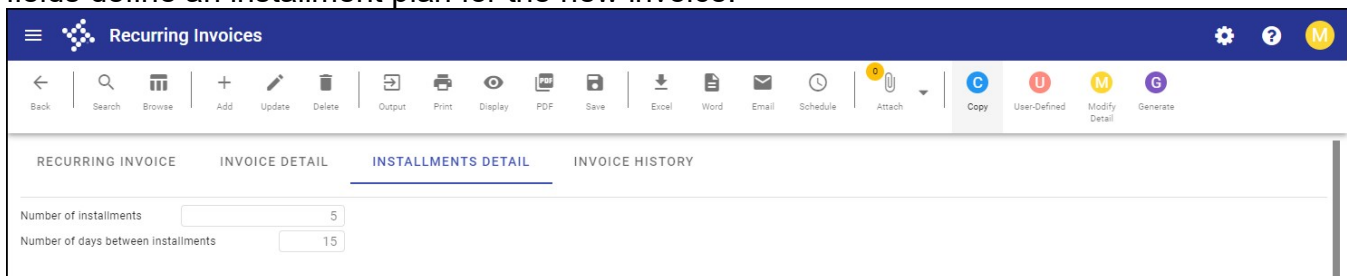
2020.1

Jira Issue: MUN-360135

Purpose: To provide installments for recurring invoices.

Estimated PACE Training Time: ½ day

Description: When you are adding a new recurring invoice, the Installment Details tab provides the Number of Installments and Number of Days Between Installments fields. These fields define an installment plan for the new invoice.



During the Generate process, the installment date is configured from the invoice date and the defined installment details. Once the invoice is generated and posted, the Bill Inquiry record includes the details on the Installments tab.

Bill Inquiry: Single Bill View

Back | Browse | Output | Excel | Word | Email | Schedule | Attach | Notify | Map | Original Bill | Reprint | Preferences | Scanline

Bill Information

Year	Category	Number	AR Code	Bill Type
2020	GB-PI	10374	PI	I

Customer Information: Customer ID: 187, 0 [View Bills](#)

FRITZ, MICHAEL
1 COLE HAAN DRIVE
YARMOUTH ME 04096
207-878-9998

Source: Effective Date: 01/06/2020, Processing Date: 01/06/2020, Entry Date/Time: 01/06/2020, Clerk: maureen.elfring, Department: , Created by Program: GB Invoice Entry and Pro, Bill Run: , Commitment:

Notes/Alerts: [Special Conditions/Notes](#), View prior unpaid bills

Effective Date: **Due 01/06/2020**

INSTALLMENTS | CHARGES | GL ALLOCATION | HISTORY | REFERENCES | RELATED BILLS | EVENTS | AUDITS

Installment	Bill Date	Due Date	Interest Date	Penalty Date	Billed	Adjustments	Abatements	Abt/Adj	Paid	Discount	Re
1	01/06/2020	02/05/2020	02/20/2020		200.00	0.00	0.00	0.00	0.00	0.00	
2	01/06/2020	02/20/2020	03/06/2020		200.00	0.00	0.00	0.00	0.00	0.00	
3	01/06/2020	03/06/2020	03/21/2020		200.00	0.00	0.00	0.00	0.00	0.00	
4	01/06/2020	03/21/2020	04/05/2020		200.00	0.00	0.00	0.00	0.00	0.00	
5	01/06/2020	04/05/2020	04/20/2020		200.00	0.00	0.00	0.00	0.00	0.00	

1 of 1 | < > | Installment number.

Permits & Code Enforcement

Department/Board Codes

2020.2

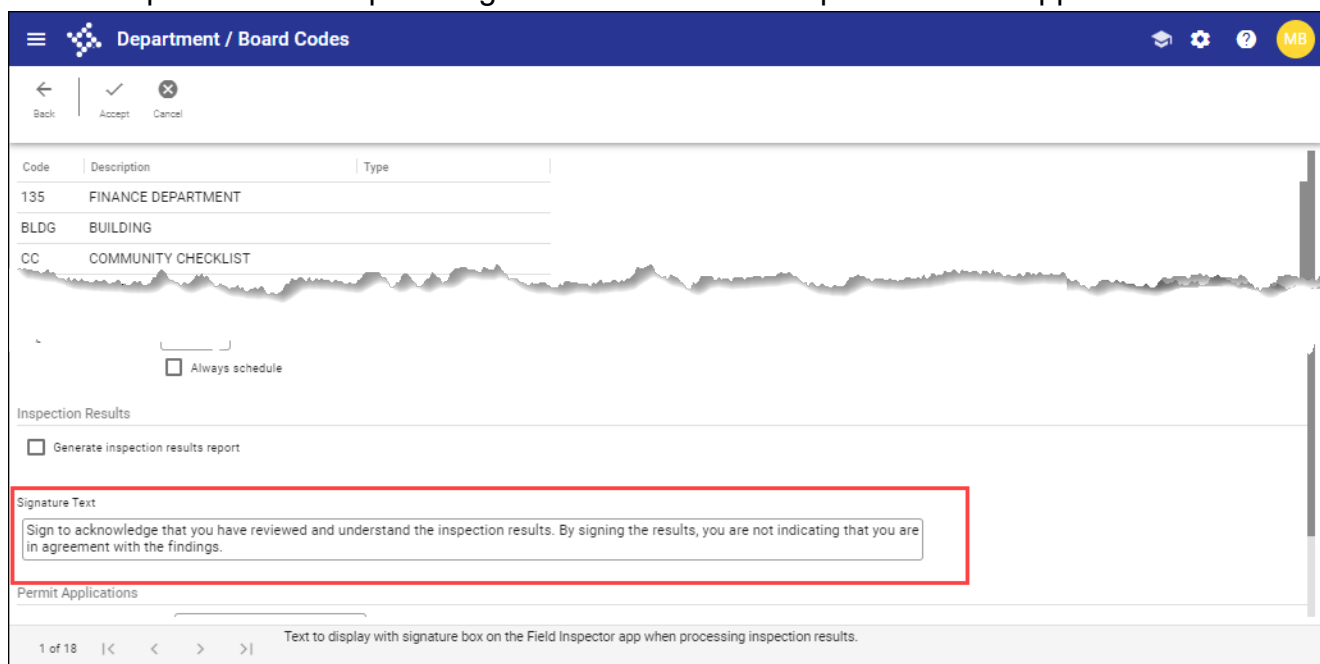
Jira Issue: MUN-335829

Purpose: To provide descriptive text for the Field Inspector mobile app signature process and to indicate in Enterprise ERP when a signature has been captured for an inspection.

Estimated PACE Training Time: Less than ½ day

Description: An optional inspection signature can be captured in the Field Inspector mobile app. This signature is passed to Enterprise ERP for inclusion on result emails and reports. The signature is not stored independently in Enterprise ERP but only on the report attached to the inspection.

The Department/Board Codes program includes the Signature Text field. This field provides the descriptive text for required signatures in the Field Inspector mobile app.



Code	Description	Type
135	FINANCE DEPARTMENT	
BLDG	BUILDING	
CC	COMMUNITY CHECKLIST	

Always schedule

Inspection Results

Generate inspection results report

Signature Text

Sign to acknowledge that you have reviewed and understand the inspection results. By signing the results, you are not indicating that you are in agreement with the findings.

Permit Applications

1 of 18 |< < > >| Text to display with signature box on the Field Inspector app when processing inspection results.

In Inspection Entry, the Results Signed field indicates if a signature was acquired during inspection results. This field indicates Y/N.

Event Notifications

2020.2

Jira Number: MUN-335576

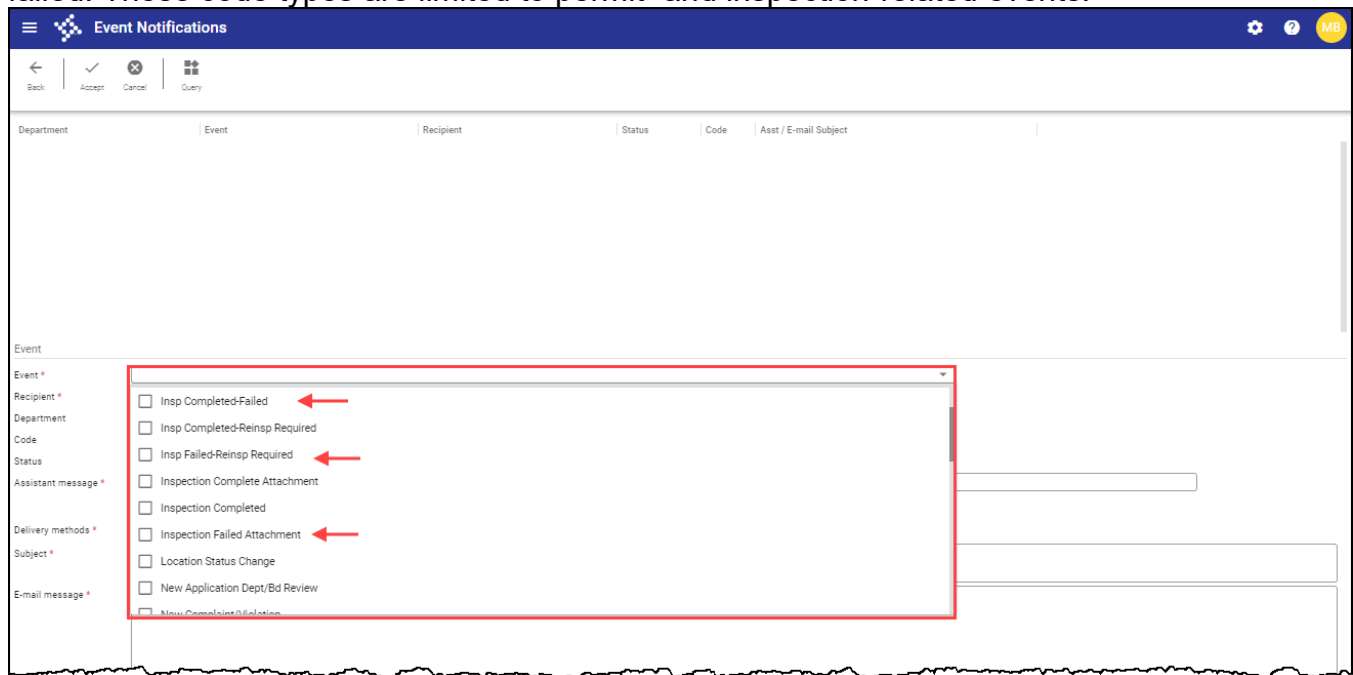
Purpose: To send inspection results to business owners for failed inspections.

Enterprise ERP, *powered by Munis®*

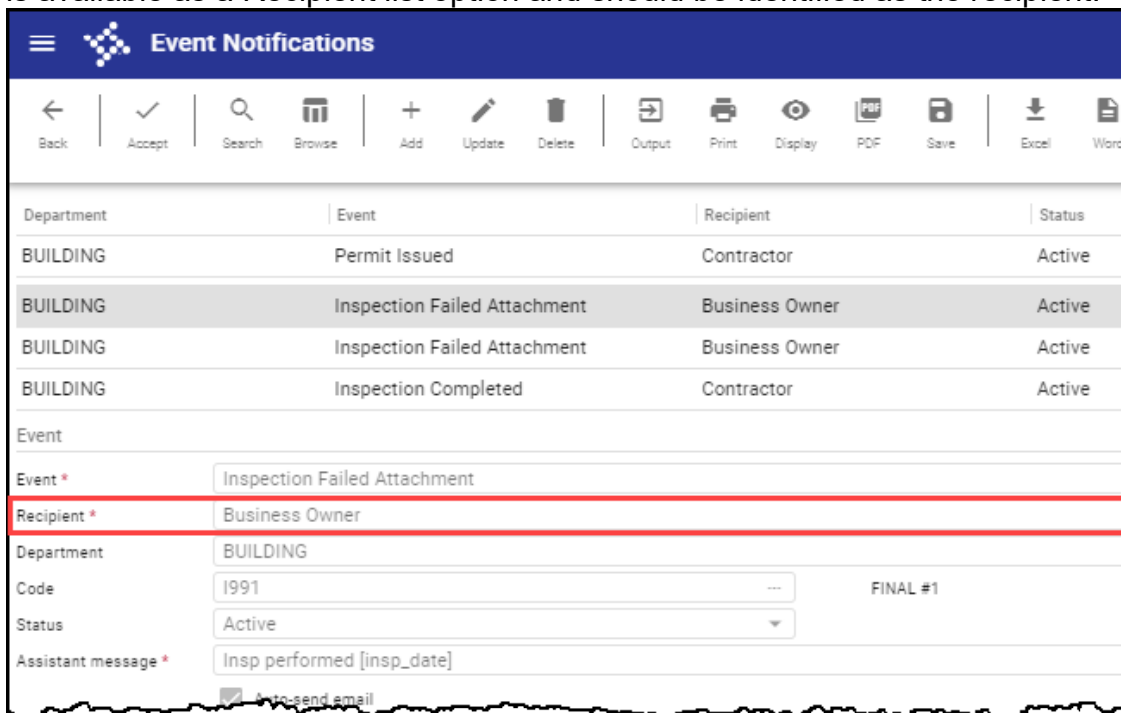
Estimated PACE Training Time: Less than ½ day

Description: In the Event Notifications, three new event types provide notifications for inspection failures. In addition, the program includes the business owner as a recipient for all inspection-related results.

The Inspection Failed, Inspection Failed–Reinspection Required, and Inspection Failed–Attachment event types cause a notification to be sent for defined inspection types that have failed. These code types are limited to permit- and inspection-related events.



When creating notifications for each of the inspection-failed event types, the Business Owner is available as a Recipient list option and should be identified as the recipient.



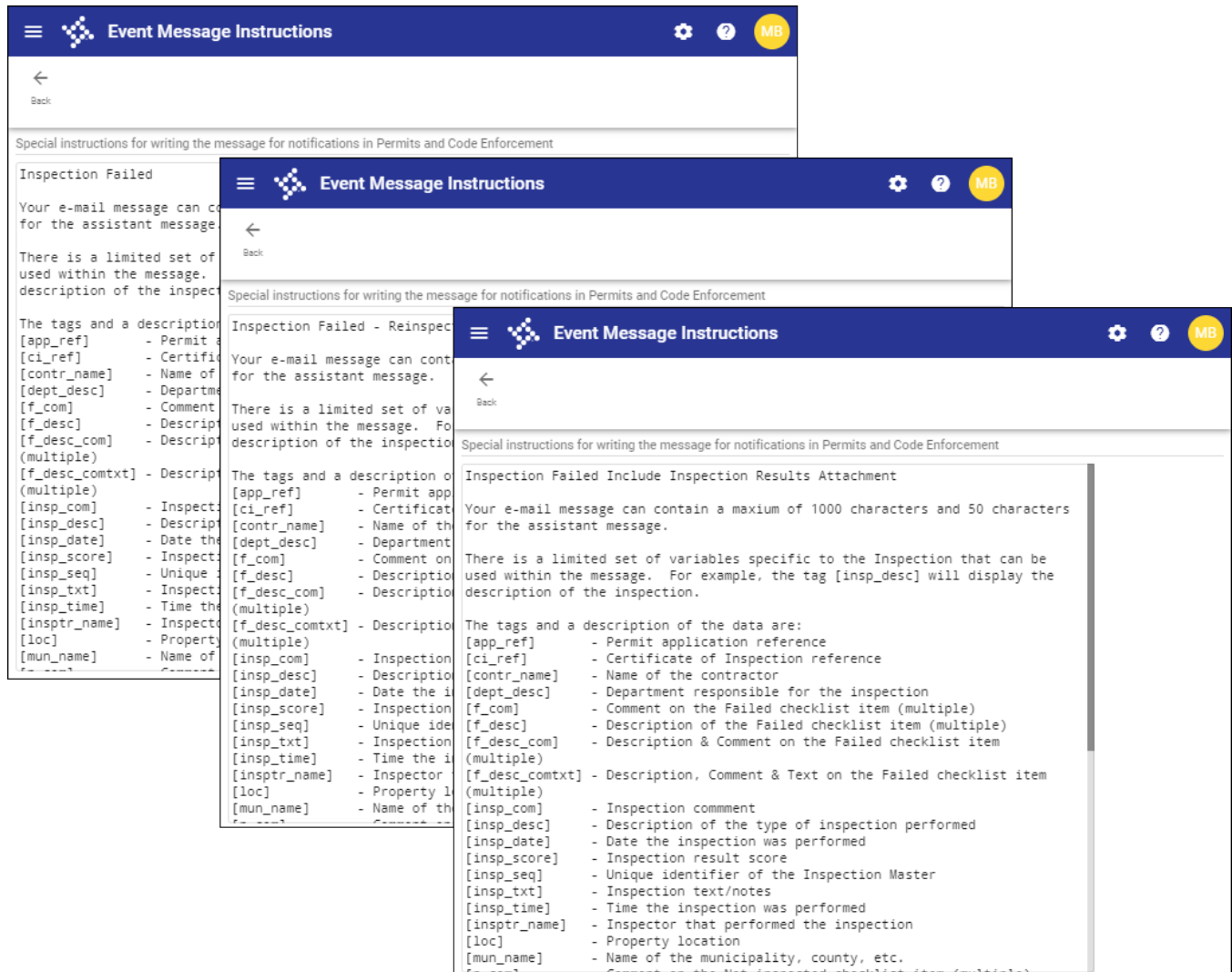
The screenshot shows the 'Event Notifications' interface. At the top is a toolbar with icons for Back, Accept, Search, Browse, Add, Update, Delete, Output, Print, Display, PDF, Save, Excel, and Word. Below the toolbar is a table with the following data:

Department	Event	Recipient	Status
BUILDING	Permit Issued	Contractor	Active
BUILDING	Inspection Failed Attachment	Business Owner	Active
BUILDING	Inspection Failed Attachment	Business Owner	Active
BUILDING	Inspection Completed	Contractor	Active

Below the table is a form for creating a new notification. The 'Event' field is set to 'Inspection Failed Attachment'. The 'Recipient' field is set to 'Business Owner' and is highlighted with a red border. Other fields include 'Department' (BUILDING), 'Code' (I991), 'Status' (Active), and 'Assistant message' (Insp performed [insp_date]). There is also a checkbox for 'Do not send email' which is checked.

For the inspection failed event types, clicking Instructions in the toolbar provides the instructions for creating the email notifications, including a list of variables to use within the

notification text.



The screenshots show the 'Event Message Instructions' app interface. The top header is blue with a menu icon, the title 'Event Message Instructions', and settings, help, and user icons. Below the header is a 'Back' button and a title bar for the current instruction.

The first screenshot shows the title 'Inspection Failed' and the text: 'Your e-mail message can contain a maximum of 1000 characters and 50 characters for the assistant message. There is a limited set of variables specific to the Inspection that can be used within the message. For example, the tag [insp_desc] will display the description of the inspection.'

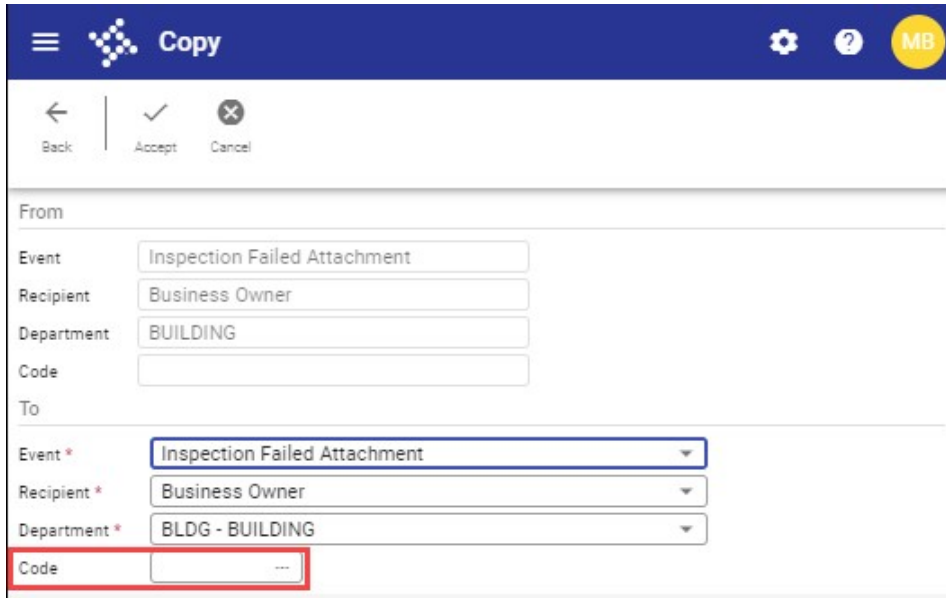
The second screenshot shows the title 'Inspection Failed - Reinspect' and the same text as the first screenshot.

The third screenshot shows the title 'Inspection Failed Include Inspection Results Attachment' and the same text as the first screenshot.

Each screenshot includes a list of tags and their descriptions:

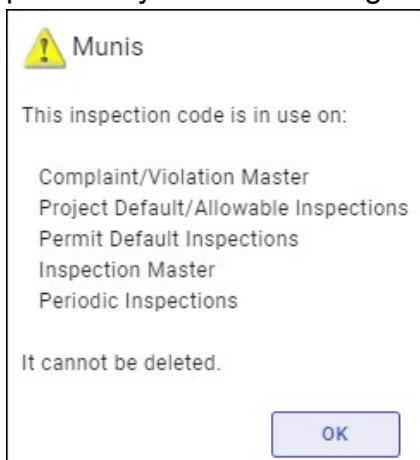
- [app_ref] - Permit application reference
- [ci_ref] - Certificate of Inspection reference
- [contr_name] - Name of the contractor
- [dept_desc] - Department responsible for the inspection
- [f_com] - Comment on the Failed checklist item (multiple)
- [f_desc] - Description of the Failed checklist item (multiple)
- [f_desc_com] - Description & Comment on the Failed checklist item (multiple)
- [f_desc_comtxt] - Description, Comment & Text on the Failed checklist item (multiple)
- [insp_com] - Inspection comment
- [insp_desc] - Description of the type of inspection performed
- [insp_date] - Date the inspection was performed
- [insp_score] - Inspection result score
- [insp_seq] - Unique identifier of the Inspection Master
- [insp_txt] - Inspection text/notes
- [insp_time] - Time the inspection was performed
- [insptr_name] - Inspector that performed the inspection
- [loc] - Property location
- [mun_name] - Name of the municipality, county, etc.

The Copy screen for Event Notifications includes the Code field in the To group. Completing this field with an inspection type code copies the event type to a new permit or inspection code.

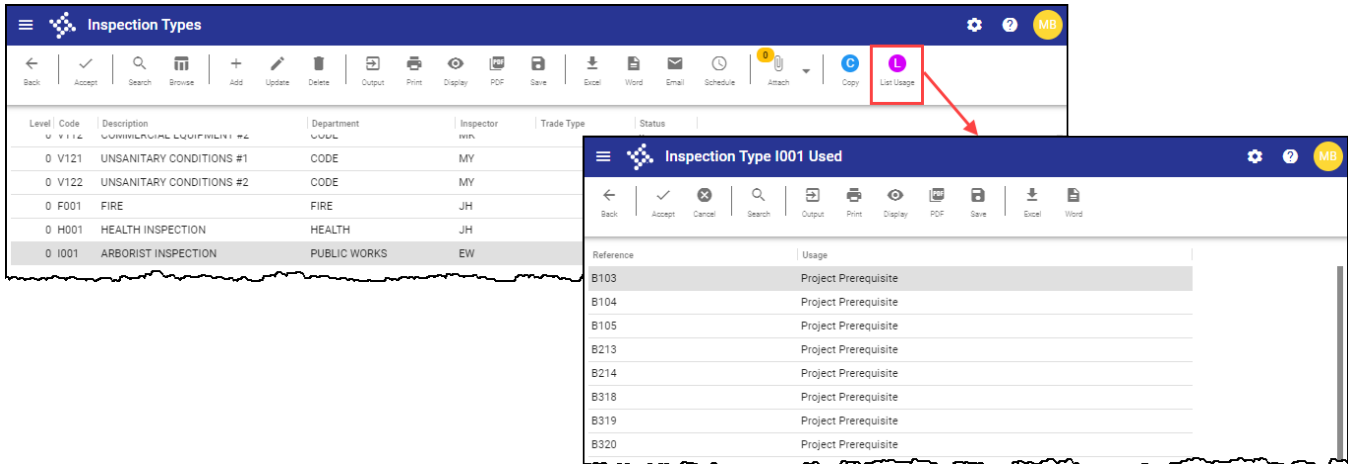


Inspection Types

In the Inspection Types program, if you attempt to delete an inspection type code, the program verifies that the code is not in use for event notifications. If the code is in use, the program prevents you from deleting it.



Also in Inspection Types, the List Usage toolbar option provides a list of the tables where the inspection type is used.



2021.2

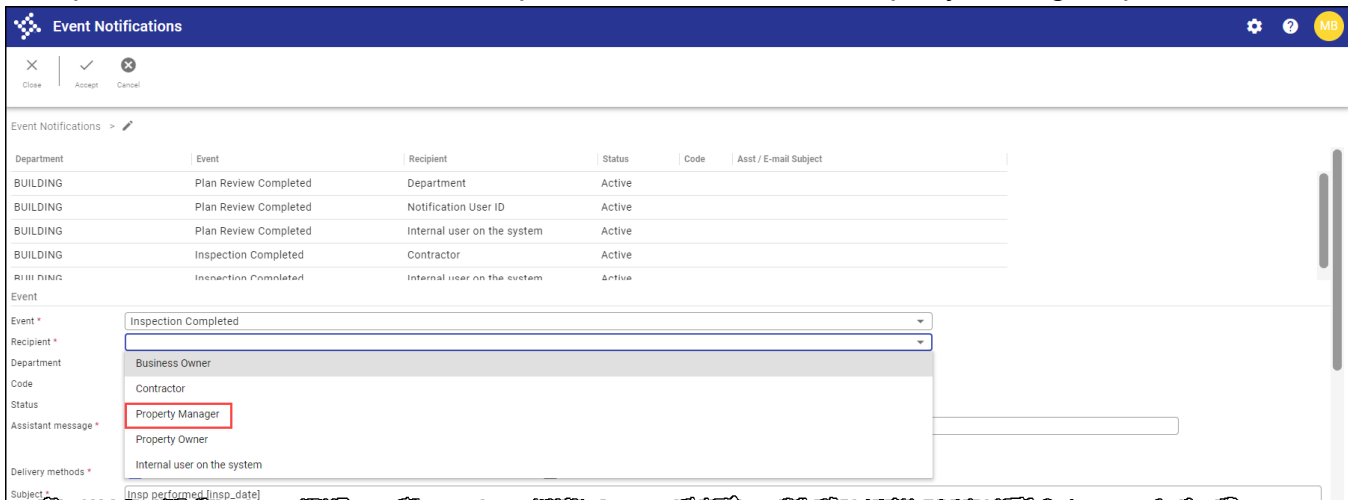
Jira Number: MUN-341447

Purpose: To notify property managers of inspection, complaint, and violation events.

Client Suggestion: Yes

Estimated PACE Training Time: Less than ½ day.

Description: For Inspection Completed, Inspection Completed–Reinsp, and New Complaint/Violation events, the Recipients list includes the Property Manager option.



When Property Manager is selected, any notifications generated for these events are sent directly to the property manager identified for the property.

In the E-mail Message field, the [mgr_name] variable can be inserted to represent the Property Manager name. When the event notification message is generated, the property

manager's name replaces the variable.

Subject *	Insp performed [insp_date]
E-mail message *	[insp_desc] inspection was performed on [insp_date] by [inspr_name]. Inspection [insp_seq] was done for the property located at [loc] in [mun_name]. The inspection results are [rsit_desc]. Please share with the [mgr_name].
Phone message	

Inspection Entry

2020.2

Jira Issue: MUN-335434

Purpose: To record when field sheets were most recently printed.

Estimated PACE Training Time: Less than ½ day

Description: The Last Printed field in Inspection Entry indicates when the field sheet was printed. This field is updated by the program during processing and is printed on the field sheet.

Inspection Entry Exports

2020.2

Jira Issue: MUN-335746, MUN-335785

Purpose: To include required business fields in Word and Excel export files.

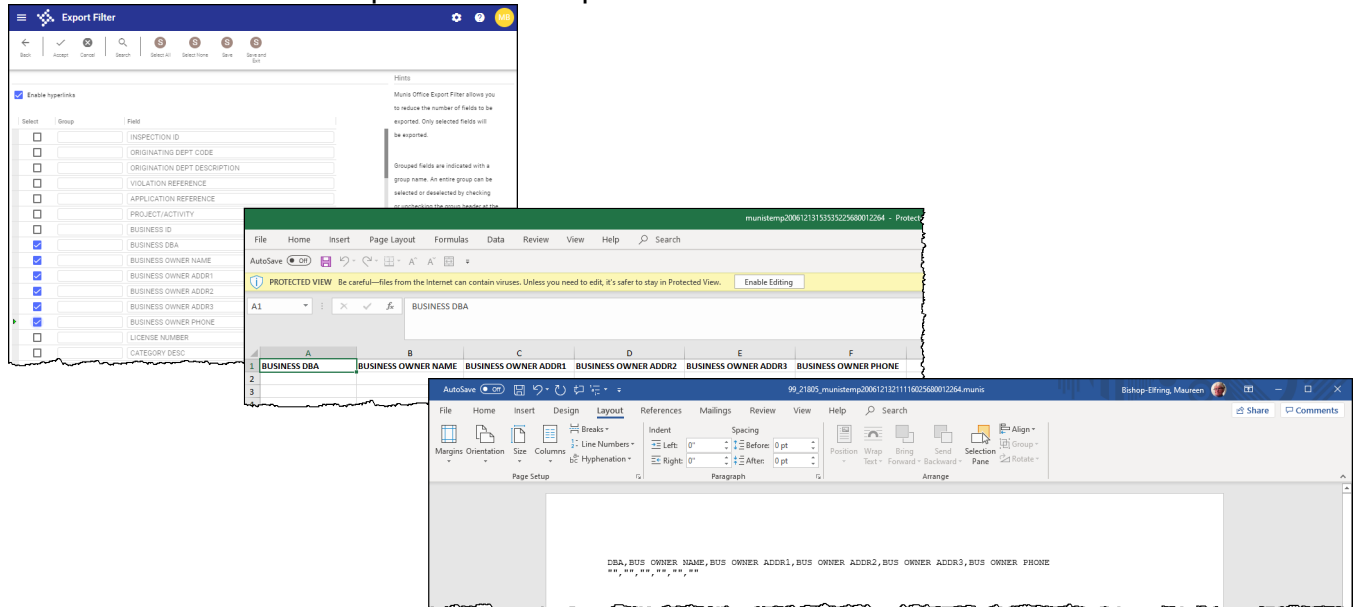
Estimated PACE Training Time: Less than ½ day

Description: In Inspection Entry, Microsoft Word and Microsoft Excel exports for inspections include the following business-related fields:

- DBA

- Business Owner Name
- Business Address
- Business Phone Number

The Export Filter for the Excel and Word options include these business fields, allowing you to select the fields for the export files as required.



- If the inspection is linked to a license or tax, the Export Filter includes the License Number/Tax Number, Category Description, and Type Description fields for selection.
- If the inspection is linked to a license location, the Export Filter includes the Machine Type, Machine Owner Name, Machine Owner Address, and Machine Owner Phone Number fields for selection.

Inspection Entry, Status Codes

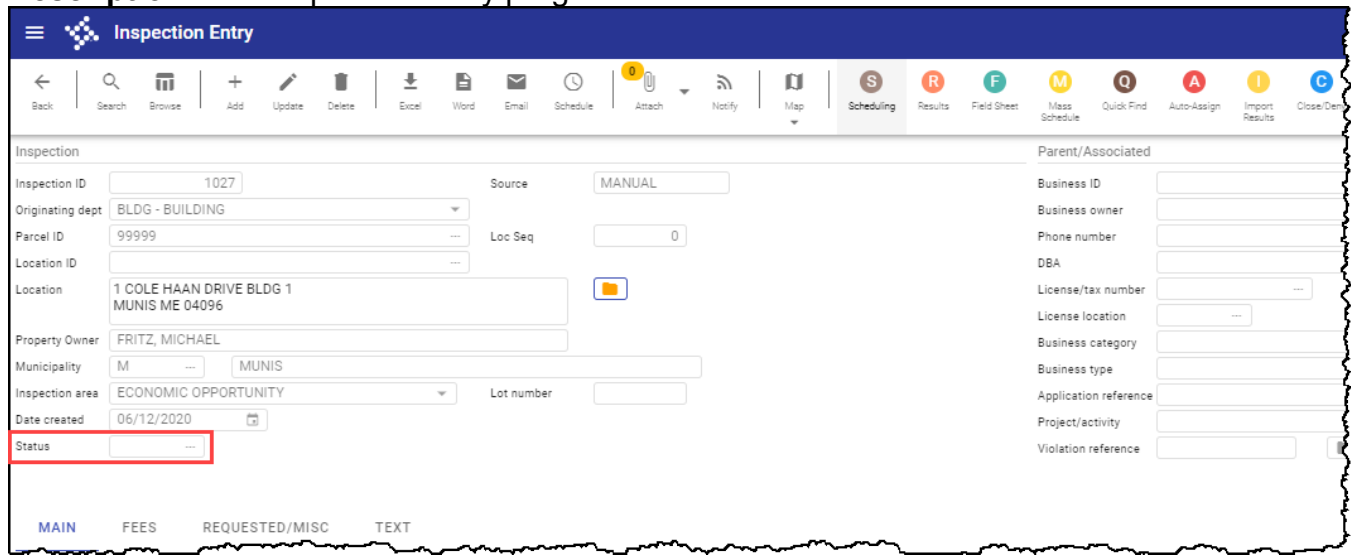
2020.2

Jira Issue: MUN-335832

Purpose: To provide a user-defined, optional status for inspection records.

Estimated PACE Training Time: Less than ½ day

Description: The Inspection Entry program includes the Status field.



The screenshot shows the 'Inspection Entry' form with the following fields:

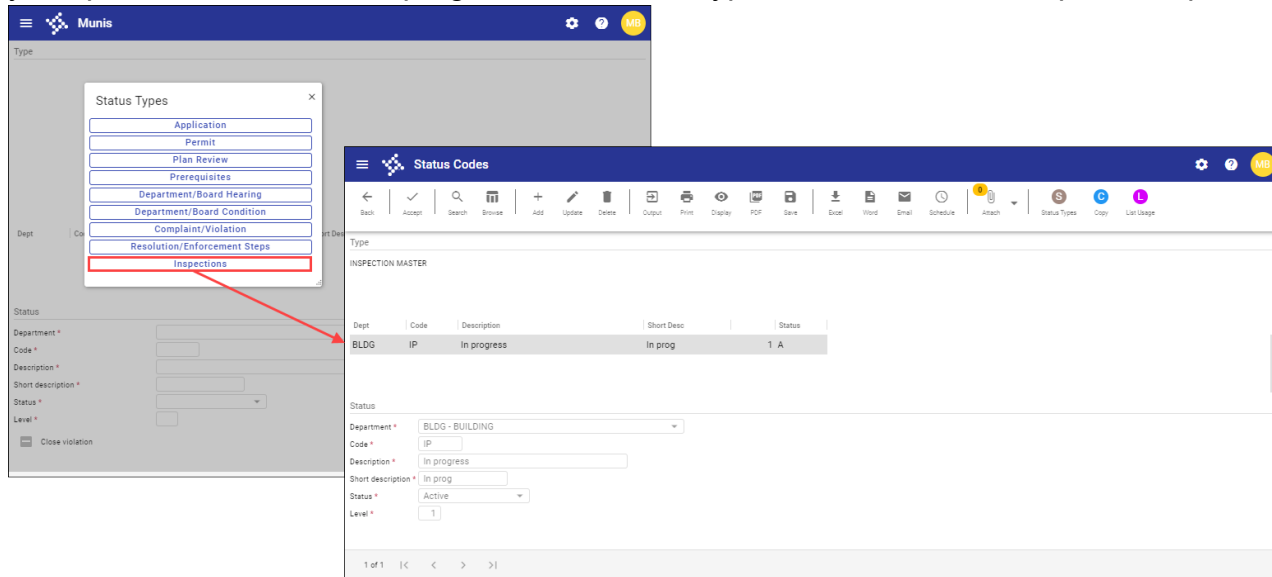
- Inspection ID:** 1027
- Source:** MANUAL
- Parent/Associated:** Business ID, Business owner, Phone number, DBA, License/tax number, License location, Business category, Business type, Application reference, Project/activity, Violation reference
- Originating dept:** BLDG - BUILDING
- Parcel ID:** 99999
- Loc Seq:** 0
- Location ID:** ---
- Location:** 1 COLE HAAN DRIVE BLDG 1, MUNIS ME 04096
- Property Owner:** FRITZ, MICHAEL
- Municipality:** M ---, MUNIS
- Inspection area:** ECONOMIC OPPORTUNITY
- Lot number:** ---
- Date created:** 06/12/2020
- Status:** --- (highlighted with a red box)

Navigation tabs at the bottom: MAIN, FEES, REQUESTED/MISC, TEXT

This optional field includes a code that is user-defined in the Status Codes program. This field is also included on the Find screen and can be included as search criteria.

To support this change, the Status Codes program is updated to include inspections. When

you open the Status Codes program, the Status Types list includes the Inspection option.



When you are copying status codes, the Copy screen includes the Inspection checkbox in the Status Code Types group. Selecting this checkbox ensures that all inspection status codes are included in the Copy process.

Inspections and Violations for Business Licenses

2020.2

Jira Number: MUN-335538

Purpose: To link a periodic inspection to a business account, business license, business tax, or business location when you enter or update a periodic inspection.

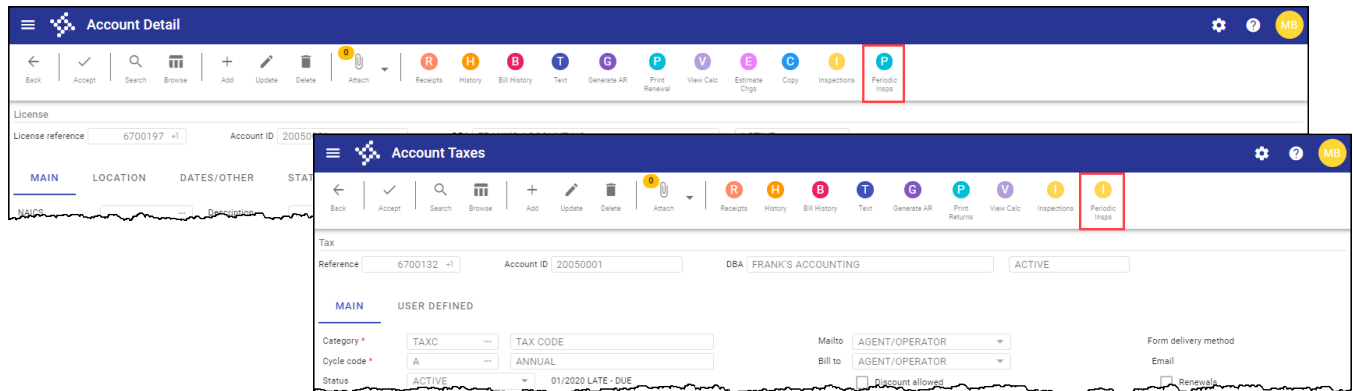
Estimated PACE Training Time: Less than ½ day

Description: Several Business Licenses and Permits & Code Enforcement programs are updated to support the integration of business licenses and periodic inspections.

Business Accounts

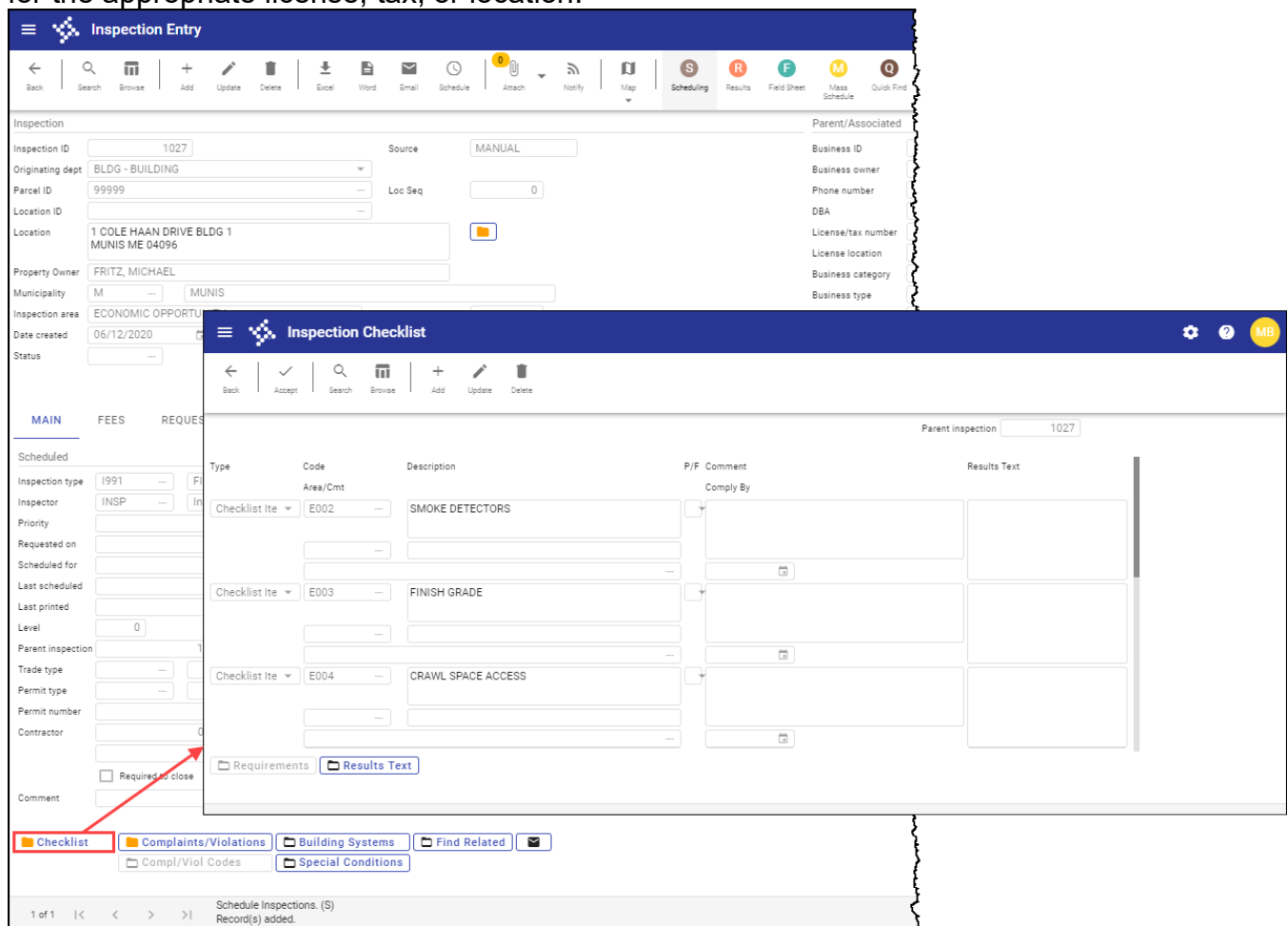
From the Licenses and Taxes screens in the Business Accounts program, the Periodic Inspections option displays the business accounts included in the current active set. When a business account is selected, the screen refreshes to display the list of periodic inspections

linked to that account.



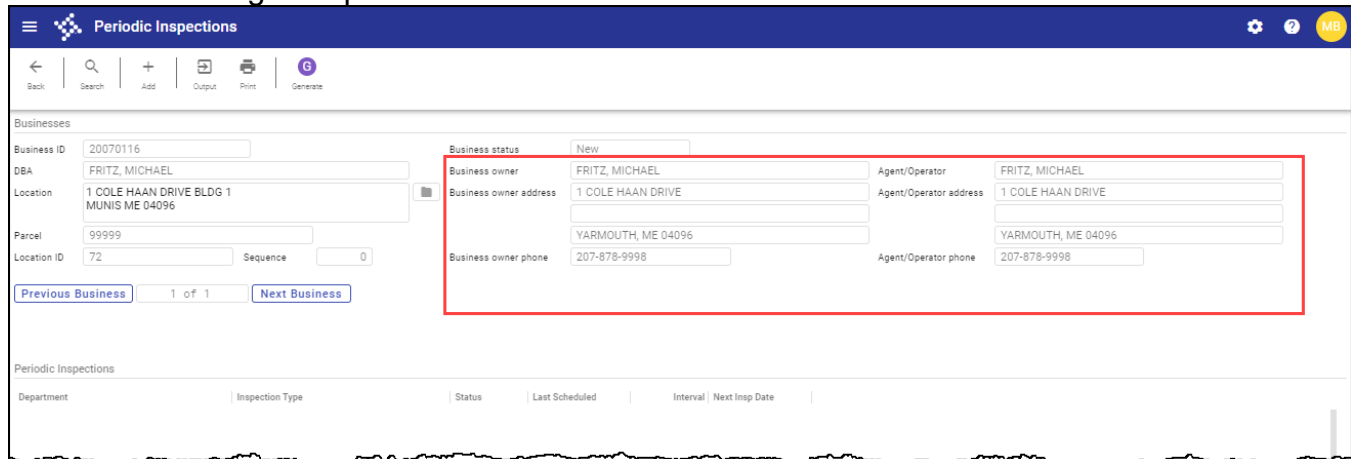
Inspection Entry

When you create an inspection record linked to a business that has a license, tax, or a license location with the Include as a Checklist Item checkbox selected, checklist items are included for the appropriate license, tax, or location.



Periodic Inspections

The Periodic Inspections screen includes the address and phone number for the Business Owner and the Agent/Operator.



Businesses

Business ID: 20070116
 DBA: FRITZ, MICHAEL
 Location: 1 COLE HAAN DRIVE BLDG 1, MUNIS ME 04096
 Parcel: 99999
 Location ID: 72 | Sequence: 0

Business status: New

Business owner: FRITZ, MICHAEL
 Business owner address: 1 COLE HAAN DRIVE, YARMOUTH, ME 04096
 Business owner phone: 207-878-9998

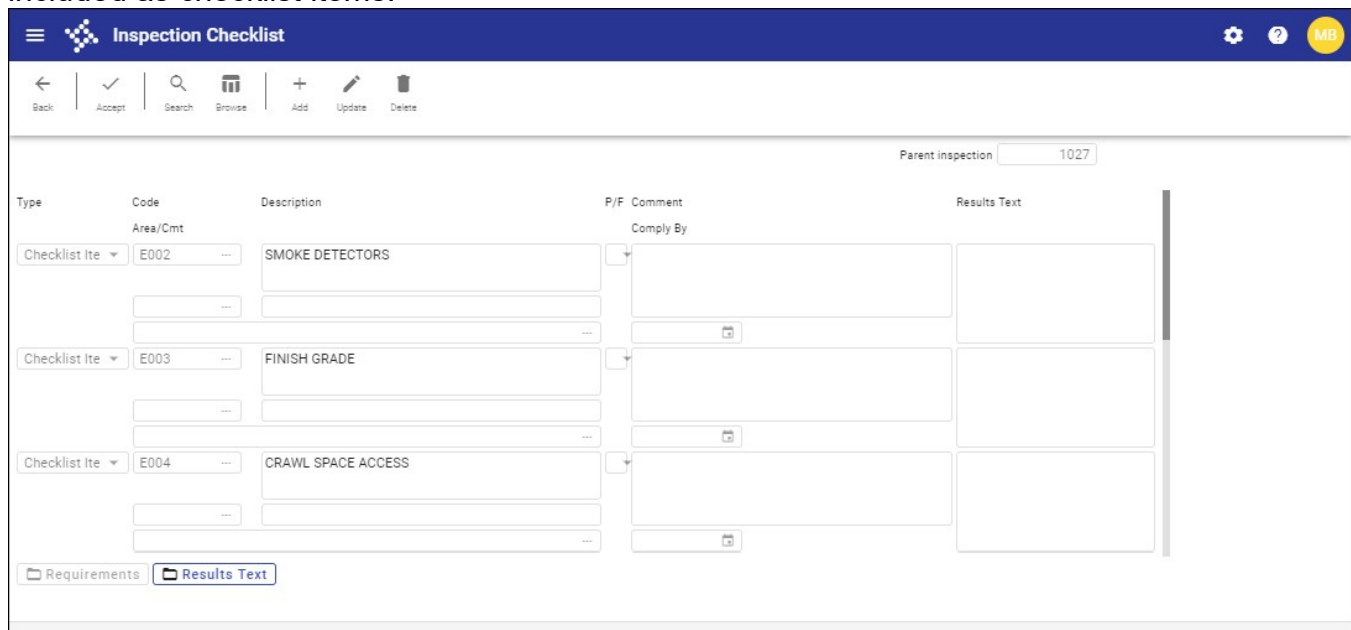
Agent/Operator: FRITZ, MICHAEL
 Agent/Operator address: 1 COLE HAAN DRIVE, YARMOUTH, ME 04096
 Agent/Operator phone: 207-878-9998

Buttons: Previous Business, 1 of 1, Next Business

Periodic Inspections

Department	Inspection Type	Status	Last Scheduled	Interval	Next Insp Date

When generating Periodic Inspections, the selected licenses, taxes, and license locations are included as checklist items.



Inspection Checklist

Parent inspection: 1027

Type	Code	Description	P/F	Comment	Results Text
Checklist Item	E002	SMOKE DETECTORS		Comply By	
Checklist Item	E003	FINISH GRADE		Comply By	
Checklist Item	E004	CRAWL SPACE ACCESS		Comply By	

Buttons: Requirements, Results Text

Field Inspector (Mobile App)

2020.2

Jira Issue: MUN-335607, MUN-335611, MUN-335614, MUN-335616, MUN-167142

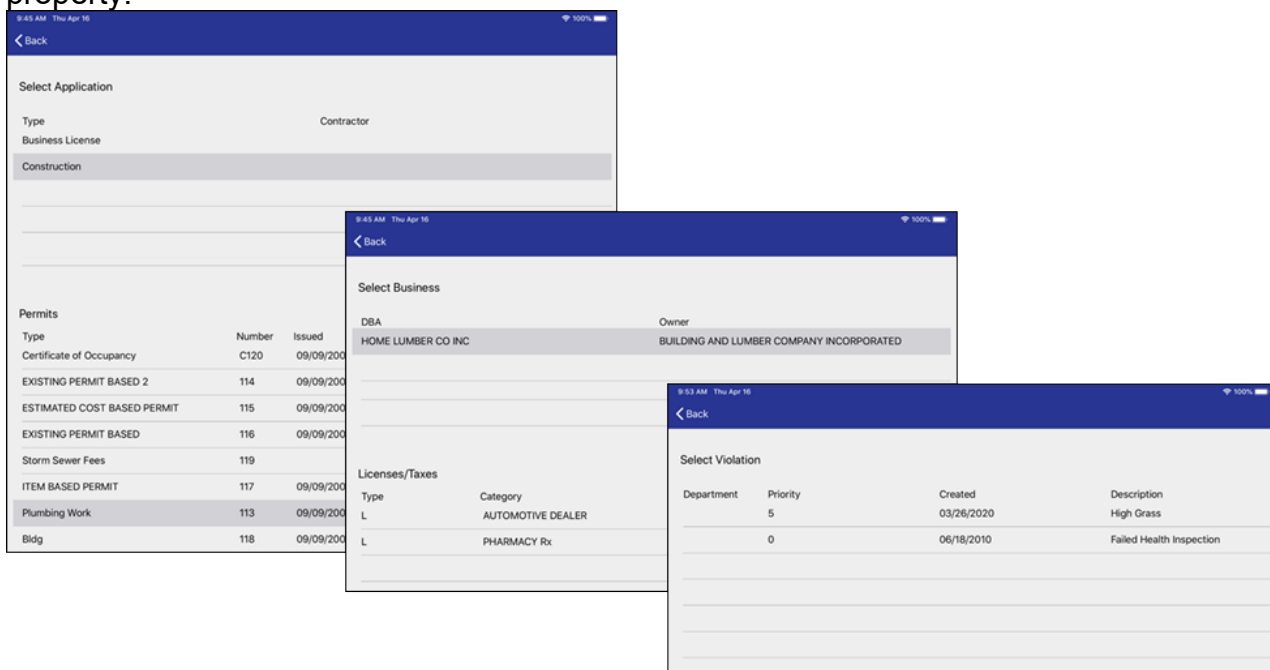
Purpose: To create a new inspection or code violation record using the Field Inspector mobile app, to add new checklist items, and to assign default inspection results according to inspection type.

Estimate PACE Training Time: ½ day

Description: The Field Inspector mobile app provides the option to create a new inspection that is not related to any inspections currently in the system. You can also link the new inspection to a business account, permit application, a violation, or a property, directly from the mobile app.

The process to create a new inspection requires multiple steps to pass information to and receive information from the Enterprise ERP server. As a result, connectivity with the Enterprise ERP server is required.

Once you have selected the Add Inspection button and identified a parcel, you can specify if the inspection should be linked to a business account, a permit application, a violation, or a property.

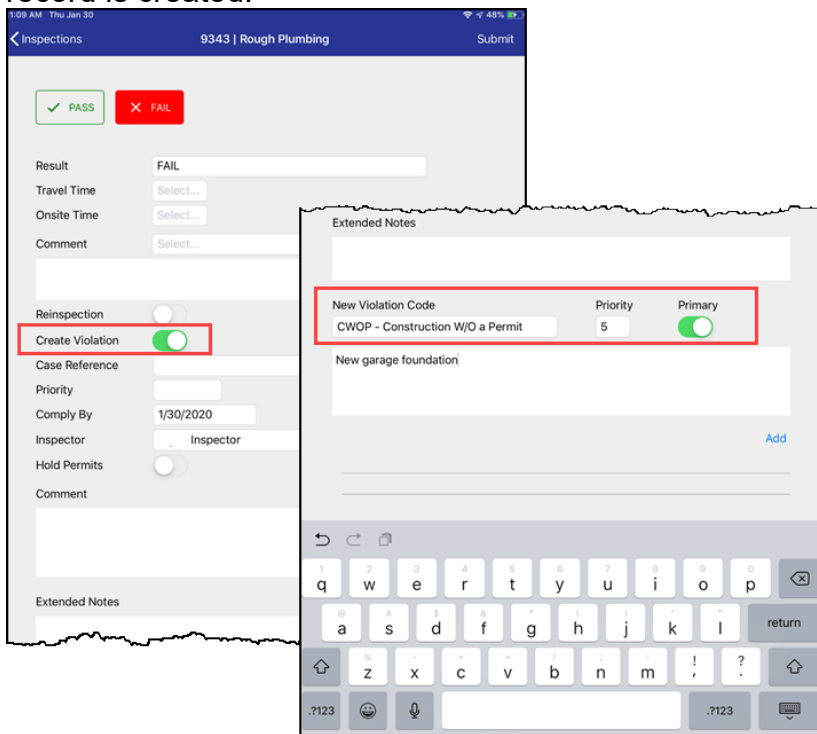


- If the inspection is linked to a business account, it can then optionally be linked to a specific license or tax on the business.
- If the inspection is linked to a permit application, it can then optionally be linked to a specific permit.

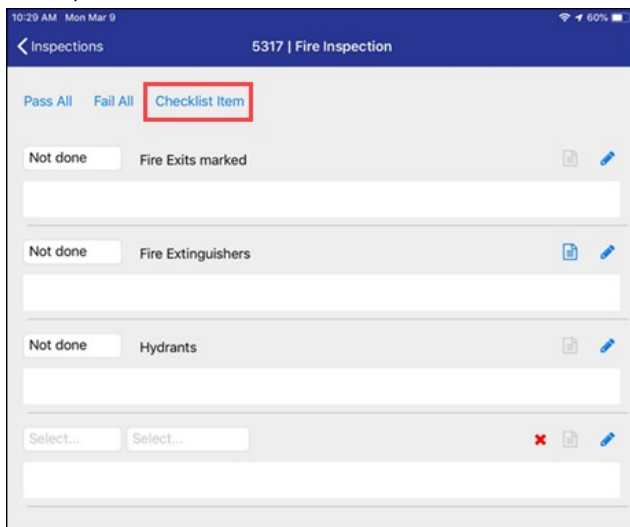
When the inspection is submitted, the inspection information is sent to the Enterprise ERP server and the inspection record is created. If the inspection is linked to the current inspector, a refresh draws the inspection into the inspector's device if the scheduled date on the inspection is in the range of inspections requested.

During an inspection, an inspector can also create a code violation record directly from the mobile app. In this case, the inspector selects the Create Violation option, completes the detail fields, assigns a violation and priority code, and then indicates if the violation is the primary

violation for the failed inspection. (There can only be one primary violation.) When the inspector submits the results, the information is passed to Enterprise ERP and the violation record is created.

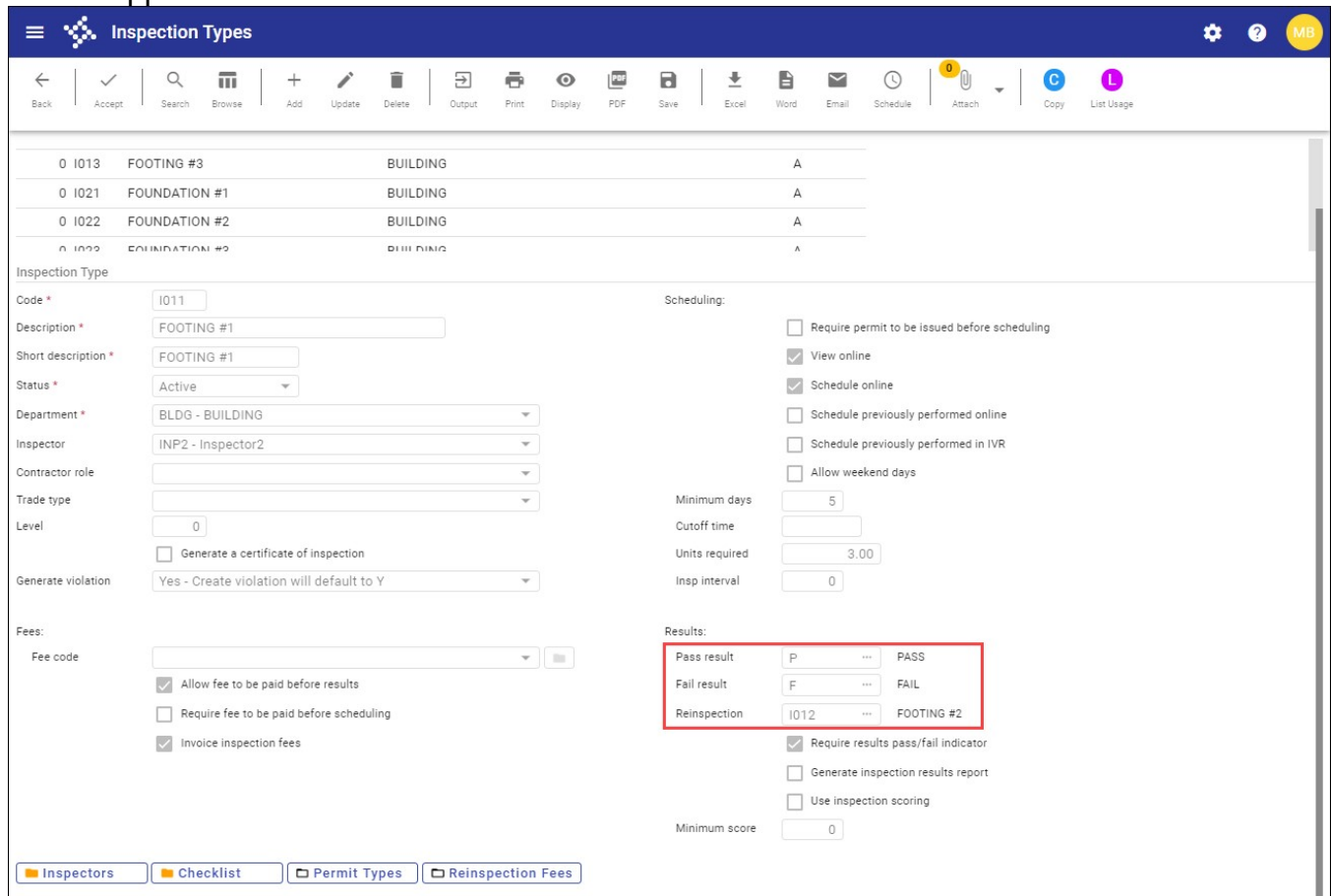


In addition to creating new inspections and code violations in the field, inspectors can add a new checklist item while completing an inspection. Selecting Checklist Item provides a blank checklist item line for completion. When the inspection results are submitted to Enterprise ERP, the new checklist items are added to the inspection record.



The Field Inspector mobile app also includes the default value for the reinspection type code. In the Inspection Types program, the Reinspection field stores a default reinspection type code. When a reinspection is created, the data passed to the app is checked for a default reinspection type code based on the current inspection's inspection type. If there is a default associated with the inspection type, this value is the default value for the reinspection type code.

Additionally, the Field Inspector app uses the default Pass or Fail result code from the Enterprise ERP Inspection Types program. When you indicate whether the inspection has passed or failed, these default values are passed from the Inspection Types program to the mobile app.

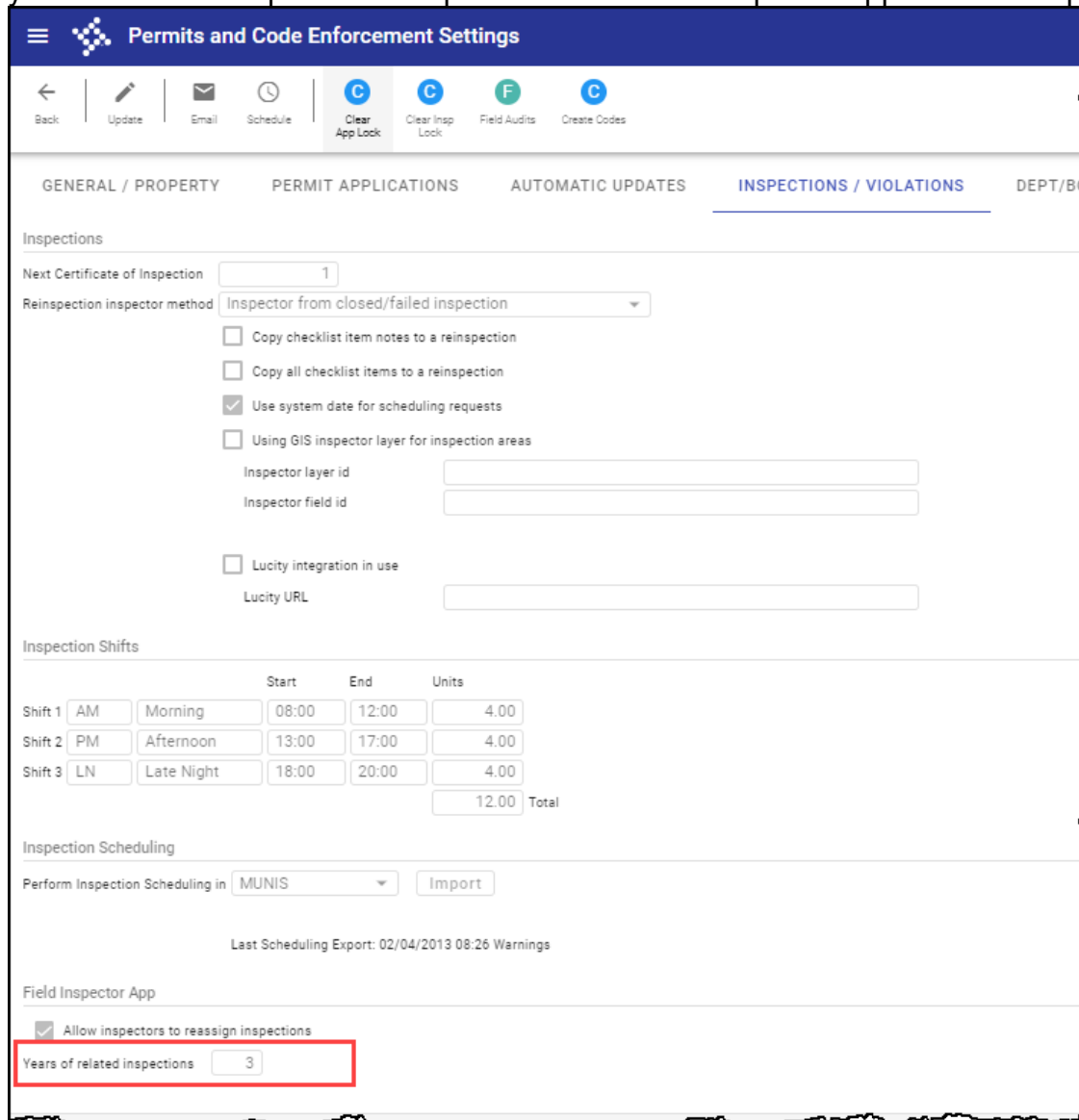


Code	Description	Department	Result Code
0 I013	FOOTING #3	BUILDING	A
0 I021	FOUNDATION #1	BUILDING	A
0 I022	FOUNDATION #2	BUILDING	A
0 I023	FOUNDATION #3	BUILDING	A

Inspection Type	
Code *	I011
Description *	FOOTING #1
Short description *	FOOTING #1
Status *	Active
Department *	BLDG - BUILDING
Inspector	INP2 - Inspector2
Contractor role	
Trade type	
Level	0
Generate violation	Yes - Create violation will default to Y
Fees:	
Fee code	
	<input checked="" type="checkbox"/> Allow fee to be paid before results
	<input type="checkbox"/> Require fee to be paid before scheduling
	<input checked="" type="checkbox"/> Invoice inspection fees
Scheduling:	
	<input type="checkbox"/> Require permit to be issued before scheduling
	<input checked="" type="checkbox"/> View online
	<input checked="" type="checkbox"/> Schedule online
	<input type="checkbox"/> Schedule previously performed online
	<input type="checkbox"/> Schedule previously performed in IVR
	<input type="checkbox"/> Allow weekend days
Minimum days	5
Cutoff time	
Units required	3.00
Insp interval	0
Results:	
Pass result	P ... PASS
Fail result	F ... FAIL
Reinspection	I012 ... FOOTING #2
	<input checked="" type="checkbox"/> Require results pass/fail indicator
	<input type="checkbox"/> Generate inspection results report
	<input type="checkbox"/> Use inspection scoring
Minimum score	0

For each inspection that is passed to the Field Inspector mobile app, the app provides a list of other inspections related to that inspection. The Years of Related Inspections field on the Inspections/Violations tab in Permits and Code Enforcement Settings indicates how many

years of related inspections are passed to the Field Inspector app for each inspection.



Permits and Code Enforcement Settings

Back | Update | Email | Schedule | Clear App Lock | Clear Insp Lock | Field Audits | Create Codes

GENERAL / PROPERTY | PERMIT APPLICATIONS | AUTOMATIC UPDATES | **INSPECTIONS / VIOLATIONS** | DEPT/BO

Inspections

Next Certificate of Inspection: 1

Reinspection inspector method: Inspector from closed/failed inspection

Copy checklist item notes to a reinspection
 Copy all checklist items to a reinspection
 Use system date for scheduling requests
 Using GIS inspector layer for inspection areas
 Inspector layer id:
 Inspector field id:
 Lucity integration in use
 Lucity URL:

Inspection Shifts

		Start	End	Units
Shift 1	AM Morning	08:00	12:00	4.00
Shift 2	PM Afternoon	13:00	17:00	4.00
Shift 3	LN Late Night	18:00	20:00	4.00
				12.00 Total

Inspection Scheduling

Perform Inspection Scheduling in: MUNIS

Last Scheduling Export: 02/04/2013 08:26 Warnings

Field Inspector App

Allow inspectors to reassign inspections

Years of related inspections:

The Years of Related Inspections applies only to inspections linked to a business or inspections linked directly to a Property Master record.

In the Field Inspector app, when you select an unperformed inspection, the Related Inspections tab provides the related inspections as follows:

- If the inspection is linked to a permit application, only inspections linked to the same permit application are considered related. In this case, the Years of Related Inspections value does not apply.
- If the inspection is linked to a violation, only inspections linked to the same violation are considered related. In this case, the Years of Related Inspections value does not apply.

- If the inspection is linked to a business account, only inspections linked to the same business account are considered related. In this case, the Years of Related Inspections value is used to calculate the number of inspections linked to a business account.
- If the inspection is not linked to a permit application, a violation, or a business account, it is linked to the property. All inspections linked to the same parcel ID are considered related. In this case, the Years of Related Inspections value is used to calculate the number of inspections linked by a parcel ID.

Permits and Code Enforcement Settings

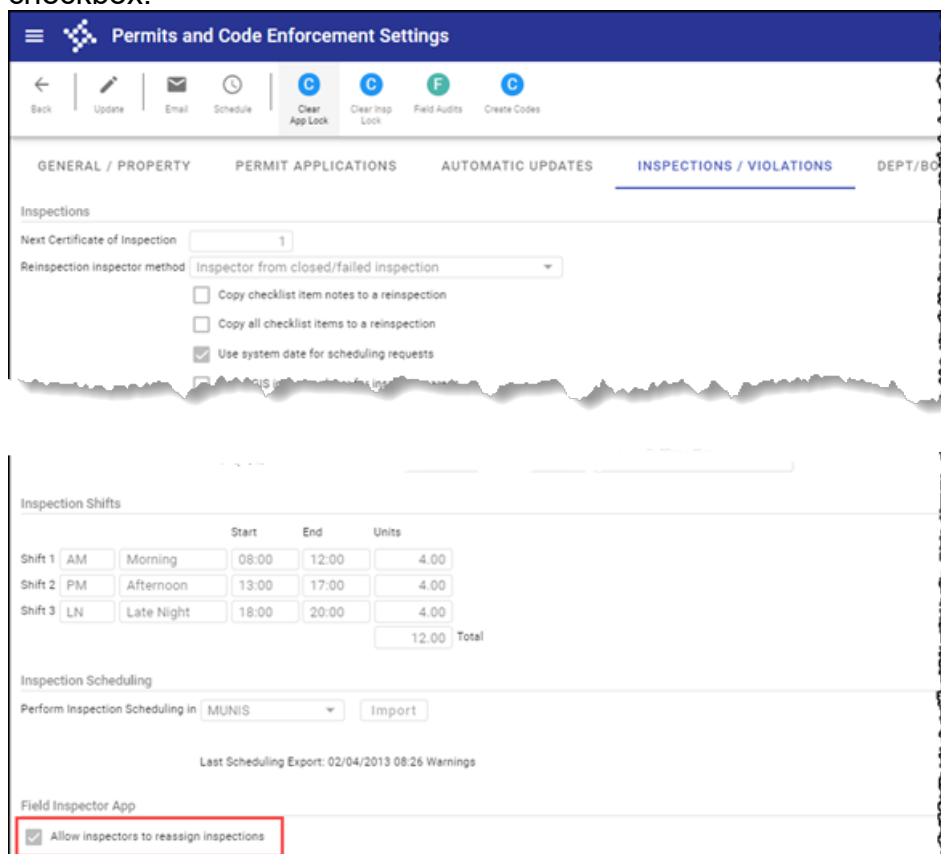
2020.2

Jira Issue: MUN-335789

Purpose: To provide a process for reassigning inspections using the Field Inspector mobile app.

Estimated PACE Training Time: Less than ½ day

Description: On the Inspections/Violations tab in the Permits and Code Enforcement Settings program, the Field Inspector App group includes the Allow Inspectors to Reassign Inspections checkbox.



Permits and Code Enforcement Settings

Back | Update | Email | Schedule | Clear App Lock | Clear Insp Lock | Field Audits | Create Codes

GENERAL / PROPERTY | PERMIT APPLICATIONS | AUTOMATIC UPDATES | **INSPECTIONS / VIOLATIONS** | DEPT/BO

Inspections

Next Certificate of Inspection: 1

Reinspection inspector method: Inspector from closed/failed inspection

Copy checklist item notes to a reinspection

Copy all checklist items to a reinspection

Use system date for scheduling requests

Inspection Shifts

	Start	End	Units
Shift 1 AM Morning	08:00	12:00	4.00
Shift 2 PM Afternoon	13:00	17:00	4.00
Shift 3 LN Late Night	18:00	20:00	4.00
			12.00 Total

Inspection Scheduling

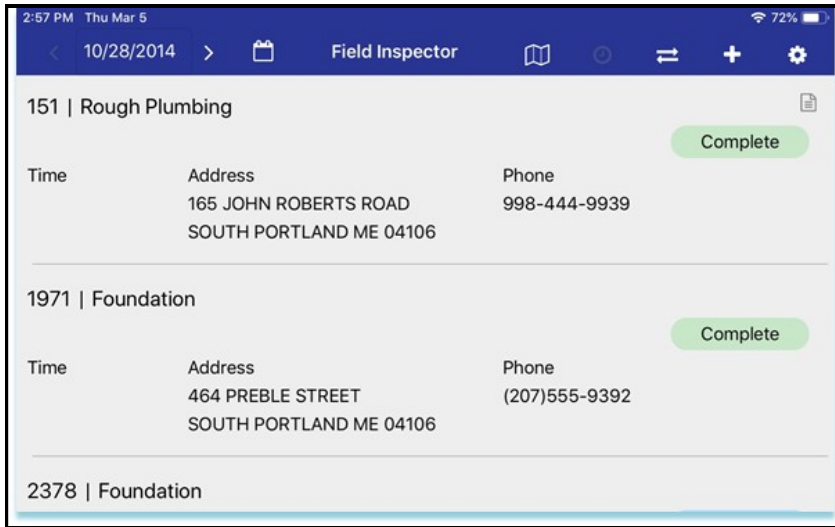
Perform Inspection Scheduling in: MUNIS | Import

Last Scheduling Export: 02/04/2013 08:26 Warnings

Field Inspector App

Allow inspectors to reassign inspections

When this setting is not enabled, the Reassign Inspections option is not available in the Field Inspector app.



Property Central

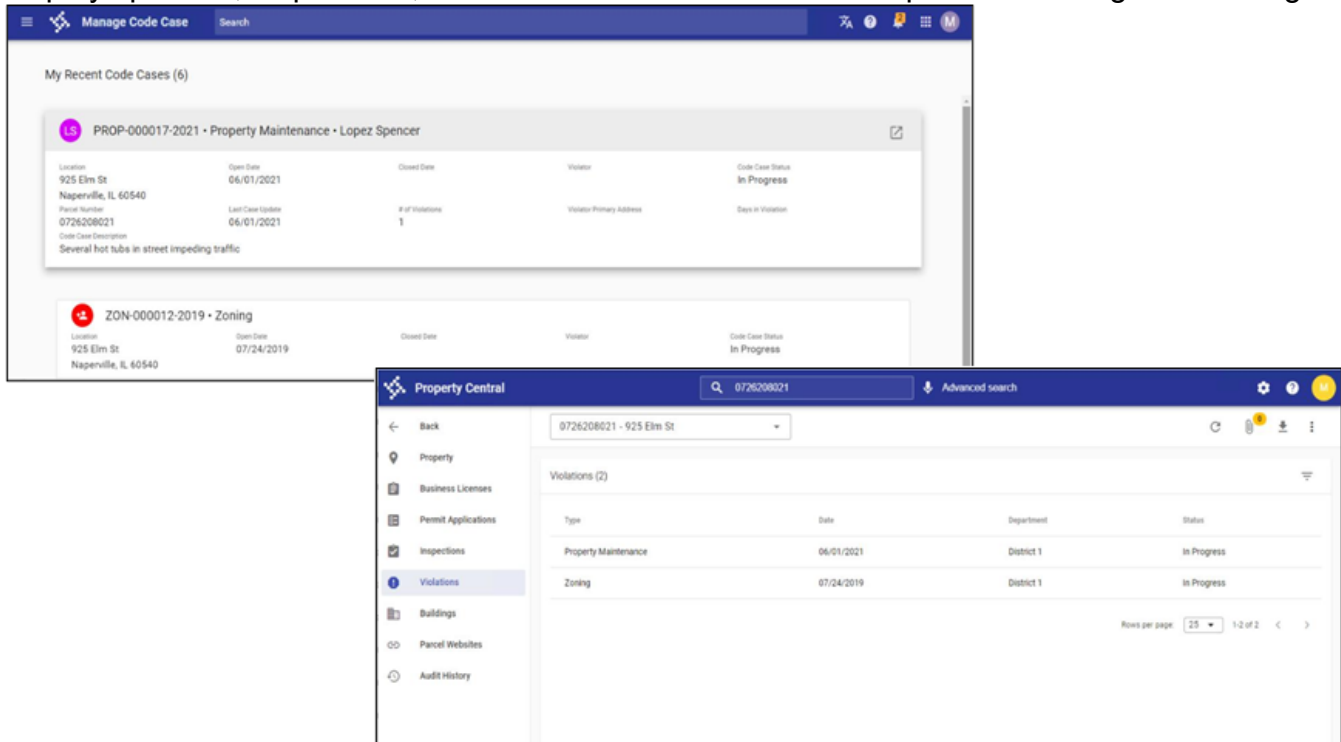
2021.2

Jira Number: MUN-392165

Purpose: To surface Enterprise Permitting & Licensing, powered by EnerGov data when Enterprise ERP and Enterprise Permitting & Licensing are integrated.

Estimated PACE Training Time: Less than ½ day.

Description: When integrated with Enterprise Permitting & Licensing, Property Central displays permits, inspections, and violations sourced from Enterprise Permitting & Licensing.



Hub, Permitting

2020.1

Jira Number: MUN-328935

Purpose: To provide permitting analytics through the Hub.

Estimated PACE Training Time: ½ day

Description: The Permitting page is available for Enterprise ERP Permits & Code Enforcement.

The screenshot displays the Permitting dashboard with the following components:

- Navigation:** Home icon, menu icon, "Permitting" title, search bar, and user profile icon.
- Filters:** "I want to focus on ..." section with "Project" and "Department" filters, both currently set to "No items selected".
- Summary Cards:**
 - Unpaid fees: \$25
 - Count: 1
 - Pending Permits: 553
 - Permits Issued: 0
- Alerts: What actions are coming due?**

Condition	Description	Dept Code	Project Type	Alert Date	App Ref
Permits ready to be issued	2 Permits	BLDG	PROJ		105
Application Bond Expiration ...	Type C Company	PW	B103	1/5/2017	107
Permit Expiration due	PLAN REVIEW	PW	B103	1/9/2014	107
Permit Review By due	BUILDING ESTIMATED COST	PW	B103	1/16/2013	107
Permit Review By due	CERTIFICATE OF OCCUPANCY	PW	B103	1/16/2013	107
Permit Review By due	ELECTRIC	PW	B103	1/16/2013	107
Permit Review By due	GAS	PW	B103	1/16/2013	107
Permit Review By due	MECHANICAL	PW	B103	1/16/2013	107
Permit Review By due	PLUMBING	PW	B103	1/16/2013	107
Permit Review By due	SEWER	PW	B103	1/16/2013	107
Permit Review By due	WATER	PW	B103	1/16/2013	107
Blanket Bond Expiration due		BLDG	B324	1/31/2013	109
Permit Expiration due	FENCE	BLDG	B324	3/24/2018	109
Permit Expiration due	PLAN REVIEW	BLDG	B324	2/26/2014	109
Permit Review By due	BUILDING ESTIMATED COST	BLDG	B324	3/5/2013	109
Permit Review By due	CERTIFICATE OF OCCUPANCY	BLDG	B324	3/5/2013	109
Permit Review By due	ELECTRIC	BLDG	B324	3/5/2013	109
Permit Review By due	GAS	BLDG	B324	3/5/2013	109
- New Permit Applications:** A bar chart showing "Apply Period" for "Application Ref" with a value of 1.0 on a scale from 0 to 1.1.
- Open Items:** A donut chart showing the distribution of open items:
 - Restriction Hazard Holds: 15%
 - Incomplete Dept Board Reviews: 17%
 - Unperformed Inspections: 34%
 - Unassociated Bonds: 22%
 - Unapproved Prerequisites: 1%
 - Incomplete Plan Reviews: 1%
 - Open Violations: 1%

Your organization can customize the page using available cards. Information can include pending permits, unpaid permit fees, permit issues, open items, new permit applications, and actions that are coming due.

System Administration/Roles

System Administration/Roles describes roles and permission changes for Enterprise Revenue Management.

2020.1

Jira Number	Permission	Description
Property Revenues		
Property Tax Administration		
MUN-323203	Allow Access to the 'Generate Purge Audit Records' Option	When enabled, grants users permission to access the Generate Purge Audit Records checkbox in the Tax Bill Purge program.
MUN-342293	Enter/Maintain Voucher Records	When enabled, determines if users can enter and maintain records in the Voucher program.

2020.2-2021.5

There are no permission or role updates for Enterprise Revenue Management 2020.2.