



## Enterprise ERP powered by Munis® Enterprise Utilities

Major Enhancements 2020-2021

#### TABLE OF CONTENTS

ENTERPRISE UTILITIES	
USER INTERFACE	4
User Interface	4
2020.1	4
UTILITY BILLING CIS	5
Account Customer Inquiry, UB Central, UB Settings	5
2021.5	5
ACCOUNT EVENT HISTORY, LIEN RELEASE PROCESS	6
2021.4	
BILL PRINT, DELINQUENT NOTICES, UB SETTINGS	7
2021.5	7
BILL RUN PROCESS	8
2020.1	8
BILL RUN PROCESS, HUB	
2021.1	
BILL RUN PROCESS, UB SETTINGS	
2021.5	
CSS–Utility Billing, MSS Administration	
2020.2	
Field Sheet (mobile application)	16
2020.1	
RATE CODES, CALCULATE CHARGES, BILL ADJUSTMENTS	20
2021.4	20
Rate Masters	21
2020.1	21
RATES, MISCELLANEOUS CHARGES, SERVICES	23
2021.2	23
UB Work Orders/Print	24
2020.1	24
SYSTEM ADMINISTRATION/ROLES	
Roles	
2020.1-2021.1	
2021.2	
Utility Billing	
2021.3-2021.5	

# **Enterprise Utilities**

The Enterprise Utilities Major Enhancements document provides an overview of the major enhancements for the Enterprise ERP, powered by Munis<sup>®</sup> 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, a brief purpose statement, and the estimated PACE training time. PACE is the Tyler Planned Annual Continuing 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 reviewing PACE details, please keep in mind that sessions are scheduled in four-hour increments.

See the release notes on <u>Tyler Deploy</u> 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 <u>https://www.tylertech.com/resources/blog-articles/same-tyler-products-new-names</u> 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.

= 🐝 Employee N	Master							🗢 🌣 😧 🔇
← Q III Back Bearch Browsee	+ 🎤 🗊 🄁 Add Update Delete Output	Print Display PDF Save	Email Schedule	inate Mass Beporting Org Chart	Supervisor Vaw History CL Acct Find	Project Customer I Update Number	ESS Access Applicant Find	User Defined Updata
Employee Identification								
Employee * SSN *	Last Name *	First Name *	Middle Name	e Mi	Suffix Status			
						*		
Preferred Name								
MAIN DATES	DEMOGRAPHICS ADDRESS	PAYROLL MAIL SORT	LAST CHANGE US	ER DEFINED BENEFIT FTE	ES ORG CHART			
Employee Information								
Job Class *								
Summary Job Class								
Location *								
Group/BU *								
Project String								
Account *								
Department								
Personnel Status *		*						
Check Location								
	New Employee							
	Substance Screening Pool							
State ID								
Text Checklist								
< > >  0 to 0	>1							

# **Utility Billing CIS**

## Account Customer Inquiry, UB Central, UB Settings

### 2021.5

### Jira Number: MUN-429308

**Purpose:** To store and display audit history for accounts in Account Customer Inquiry and UB Central.

Client Suggestion: Yes.

Estimated PACE Training Time: Less than 1/2 day.

**Description:** The Site Options 1 tab of UB Settings is updated to include a checkbox for Create Audits When Viewing Accounts in UB Central/Account Inquiry. When this option is selected, the system creates audit history records whenever an account is viewed in the UB Central and Account Customer Inquiry programs.

🔆 Settings							4	¢ (	2	0
Close Accept Cancel										
Settings > 🖍										
Site Info Site Options 1 Site Options 2 S	tite Options 3 As	sessment Options	Optional Fea	ature Display	Auto Turnon					
General				Processing						
Parcel number mask				Process by	Account/CID	*				
Parcel using location				Estimate/Average I	by Account/CID	-				
Vpdate general ledger (GL)				Apply credits by	Account	•				
✓ Budget plan				Calculate late on	Current bill	*				
Use backflow inspector codes at the device level				Proration						
Calculate interest up to special condition start date				Prorate from Init	tial/final only	-				
Deposits through misc receipts				Prorate zero day	ys as	1				
Skolumeterge option in billion	man have	and a second second second	1 m	Lions	التحصيل التر	and and a	and the second second			Å.,
								-		
				Check for cu	ustomer balances du	ing move-in pro	ocess			
Display account user-defined fields in Utilities				Writeoff special co	ndition	**				
Use alternate work order processing and test results tracking for backflo	W			Default Mater As	cot Type					
Create additional work order for customer actions				Tree	Administrative	1 and		4 T		
Automatically assign outlook appointments				Type	Department	Asset	ASSE	it type		
Require service delivery point for metered services				Water Meters	1 - PW	- 21	Water			
Create audits when viewing accounts in UB Central/Account Inquiry				Electric Meters	1 - PW	• 22	Electric			
				Gas Meters	1 - PW	- 23	Gas			
Last meter #	0			Other Meters	1 - PW	- 24	Other			
Next bill #	1073			Default Departm	ont					
Next abatement #	1			Default Departing	ent					1
Transfer run				Backflow Devices	1 - PW		*			
Express onitron	·····				1 - PW		-			~

The Account Customer Inquiry and UB Central programs are modified to display the customer's primary telephone number, Social Security number, driver's license number, and date of birth for users who have been assigned the Accounts Receivable role permissions required to view this information.

<b>%</b> .	Account (	Custon	ner Inq	uiry														٠	? 👓
X Close	Q Search	Browse	Output	Print	<b>O</b> isplay	PDF	Save	Attach	•	Map	Histor	Utilities	Property Master	Contacts Search	Bill Inquiry	E Effective Date	Preferences	Guide Me Estimate Charges	Viewing Audit
Account	Customer Inq	uiry																	
Account								Billing addre	SS						Additional in	nfo			
Account	001009							100 MIDDL	EST						Account start	date	11/21/20	003	
Parcel	001009000	0000													Premise phon	e			
Route	004	(	District	M	т	ype R		MUNIS, US	12345	5					Group billing		P		
Address:	5 BAY AVE							207-782-22	260										
	MUNIS, US 12	2345						-											- 1
CID								CID Informat	tion						Recent activ	ity			
Customer		1						Social Securit	y Numbe	er	12	3-00-0000			Last bill				0.00
Name 1	SMITH,	BILL						Driver's Licens	se		77	11100			Last payment				
Name 2								Date of Birth			04	/12/1964			Bill due date				
Relation	OWNER							E-Mail							Projected pen	alty amoun	t		0.00
Start date	11/21/2	003	S	top date	12/	/31/9999									Total due on	03/2	23/2022		0.00
Dpe Sum	en Work Ord mary	ers 🗖	Contact Balance	s 🗖 s	Special Account	Conditio History	ns	Deposits Events	Curre	r <mark>ext</mark> ent Bill	ed ed	Applicati Bills	on Fees	Pa	yment Pla	ns			
		~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~	~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~	~~_~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	$\sim$	^	~~~~~

Both the Account Customer Inquiry and UB Central programs also include the Viewing Audit toolbar option. Selecting the Viewing Audit option displays the Viewing Audit screen that shows the history for one or more accounts.

Viewing Audit	۵	?	DO
Image: Cancel     Output     Print:     Display     PDF     Save     Excel     Word     Wordflow       Status     Status     Status     Status     Status			
Account Customer Inquiry > Viewing Audit			
ld Account Identifier Customer Number User Id Program Start Date			
Search / Filter Record			
$\mathbf{Q}$ $\mathbf{\overline{V}}$ $\mathbf{\overline{V}}$ $\mathbf{\overline{V}}$ $\mathbf{\overline{V}}$			

## Account Event History, Lien Release Process

### 2021.4

Jira Number: MUN-422760

**Purpose:** To provide a means of updating multiple lien release references at once. **Client Suggestion:** Yes

Enterprise ERP, *powered by Munis*® Enterprise Utilities Major Enhancements 2020-2021

### Estimated PACE Training Time: Less than 1/2 day.

**Description:** The toolbar in the Account Event History program includes the Update Lien Release Reference option, which updates multiple lien release references at once based on the lien release date.

\$	A	coun	t Ever	nt H	istory	/																۵	?	DO
X Close		Q Search	Browse		+ Add	Update	<b>D</b> elete		<b>→</b> Output	Print	<b>O</b> Display	POF	Save	Email	C) Schedule	U Attach	•	Report Options	History	Misc Charge	Update Lien Rel Ref			
Accou	nt Eve	ent Histo	ry																					
Event																		1	liens					
Accourt	nt *																	1	/olume					
Event t	ype																	F	Page					
Effectiv	/e date	~		-	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~	m S	equence				~~~.	~~~~ <i>{</i>	m	/ear	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		m.	~~~	~~~~

### Selecting this option opens the Update Lien Release Reference screen.

🐝 Account E	vent History - Update Lien Release Reference	٠	?	DO
← Define F	Process			
Account Event History	> Account Event History - Update Lien Release Reference			
Processing options				
Lien release date				
New release reference				
Define processing o	ptions			

In the Define step of the process, you can enter a new lien release date and lien release reference. The Process step searches for Transfer Delinquent to Tax (TDT) event records with a lien release date matching the defined date, and updates each record found with the defined lien release value. The program creates standard audit history for each record updated.

## **Bill Print, Delinquent Notices, UB Settings**

### 2021.5

Jira Number: MUN-422075

**Purpose:** To provide an option for defining how account numbers are formatted for Bill Print XML export to Forms.

Client Suggestion: Yes.

Estimated PACE Training Time: Less than 1/2 day.

**Description:** For organizations that use Forms with Utility Billing, the Account Format for Bill Print option in UB Settings defines how account numbers are formatted on bill statements. The selections available for this option are Account, Account-CID, CID-Account, Account CID and AccountCID.

Settings		
X V S Close Accept Cancel		
Settings > /		
Site Info Site Options 1 Site Options 2 Site Options 3 Assessment Options Optional Feature Di	splay Auto Turnon	
Utility		
Name * MUNIS UTILTIY BILLING		
Address 1 * 370 US RTE 1		
City * FALMOUTH State ME Zip code ' 04105		
and and the second and the	and the second	ر ساهای سی اس
Account	Billing	
Structure Label Size Delim	Route label *	ROUTE
Seg 1 * ACCOUNT 10	Default positions	0 to 0
	Print cat 60 bills by	Account/CID 👻
Seg 3 0 0	New customer days	Costegory bills
	Account format for bill print *	Account
Auto add account numbers	Electronia fundo tronofor	Account
Increment segment 0		Account-CID
Next account number	Account 654654654	CID-Account
	Account type Checking	Account CID
have a second with the second se		
		AccountCID

The Bill Print, Delinquent Notices, and Delinquency Manager programs are updated to transfer the defined account formatting to Forms.

## **Bill Run Process**

### 2020.1

Jira Number: MUN-324618

**Purpose:** To provide improved reporting in the Generate Charges step of the Bill Run Process.

Estimated PACE Training Time: Less than 1/2 day

**Description:** The Compare Bill Runs option compares the current bill run with a previous bill run. You can use this option to compare accounts, customers, services, metered services, based-on-other services, and flat services.

After the Generate Charges step has been defined and executed, clicking Compare on the toolbar opens the Compare Bill Runs screen. Compare Bill Runs automatically displays the

most recent bill run of the same run type.

= X	Generate Cha	irges					
← Back	Q D Search Define Ex	E M R ecute Misc Run History	Range				
Processing	options				~		
Execute this Run Begin date	report ≡ 🐝 Com	pare Bill Runs	*		\$		۵ 🔅
Account star	← D Back Define						
_ Inc	Selection criteria Current: Run M Previous: Run M	Commitment 191213 Commitment 191112					
	Differences # of Account Differences	0 View Details	# of Metered Service Differences	6 View Details	# of Sales Tax Service Difference	es 3 View Det	ails
	# of Customer Difference # of Service Differences	s 4 View Details	# of BOO Service Differences # of Flat Service Differences	5 View Details 1 View Details	)		
	SUMMARY	DEFINES					
	Run Commitment	Entry date # of A	ccounts # of Customers # of S	Services # of Metered Service	# of BOO Services # of F	lat Services # of Sales Tax	( Services
	M 191213	12/13/2019	47 41	52 30	47	22	6
	M 191112	11/12/2019	47 39	58 32	47	24	7

To compare using a different bill run/commitment, click Define and enter the bill runs and commitment numbers for the runs to compare.

😑 🐝 Comp	are Bill Runs
←   <b>D</b>	{
Back Define	😑 🤹 Compare Bill Runs
Selection criteria	- ← │ ✓ ⊗ Back Accept Cancel
	Selection criteria
	Previous: Run Commitment
	Differences

The Differences group displays the number of differences by category: account, customer, service, metered service, based-on-other service, and flat service. Clicking View Details for a category displays the detailed differences. m

Differences										
# of Account Differences	11	View Details	# of Metered Servi	ce Differences	12	View Details	# of Sales Tax Serv	ice Differences	6 View De	tails
# of Customer Differences	3	View Details	# of BOO Service [	Differences	11	View Details				
# of Service Differences	33	View Details	# of Flat Service D	ifferences	4	View Details				
- Marine Ma Marine Marine Mari	~~~^	mm	Differences     Customers in cur	rent bill run but no	t in previ	ous bill run:				×
			Account	Customer		Name	Relation	Start date	Stop date	
			BC100	55		UNIVERSAL PROPER	0	02/27/2007	12/31/9999	
			BC101	58		RODRIQUEZ, SONIA	0	07/18/2019	12/31/9999	
			BC101	58		RODRIQUEZ, SONIA	0	07/18/2019	12/31/9999	
										- 1

### The Summary tab provides a summary of totals.

SUN	IMARY D	EFINES							
ın	Commitment	Entry date	# of Accounts	# of Customers	# of Services	# of Metered Services	# of BOO Services	# of Flat Services	# of Sales Tax Service
1	191213	12/13/2019	47	41	52	30	47	22	6
I.	191112	11/12/2019	47	39	58	32	47	24	7

-

The Defines tab allows a comparison of bill runs according to selected criteria.

SUMMARY DEFI	NES								
Current define					Previous define				
Start date 11/01/2019		End date	11/30/2019		Start date		End date		
From account 10001		To account	ZZZZZZZZZZ	222222222	From account NO DATA		To account	NO DATA	
Include inactive					Include inactive				
Exclude charges with no meter read					Exclude charges with no meter read				
Exclude charges with	n meter read exceptions				Exclude charges wit	Exclude charges with meter read exceptions			
Exclude pending ser	vices				Exclude pending services				
Include only account	ts with removed meters	and old mete	r info		Include only accour	nts with removed meters	and old meter	info	
Run Type	Charge Cod	e Range	R	OUTE Range	Run Type	Charge Cod	e Range	RO	UTE Range
SERVICE - GENERAL	10%FEE	WAT800		ZZZZ	SERVICE - GENERAL	10%FEE	WAT800		ZZZZ
SERVICE - ELECTRIC		WAT800		ZZZZ	SERVICE - ELECTRIC		WAT800		ZZZZ
								***	
								•••	
			•••					]	

## **Bill Run Process, Hub**

### 2021.1

Jira Number: MUN-384226

Purpose: To provide an option for starting a bill run directly from Hub.

Estimated PACE Training Time: Less than <sup>1</sup>/<sub>2</sub> day.

**Description:** The Bill Run AFA program is available in the Utility Billing > Bill Processing section of the Tyler Menu. This program provides a guided process for creating a bill run.



The Bill Run AFA option can also be added to cards in Hub.

≡ '	Silling Activities	<b>Q</b> Search
<b>f</b>	Quick Links 🖌 🖌 🗜	
≣	Bill Run AFA	<b>W</b> 2
*	Invoice Entry and Proof	Bill Runs in Progress
	Invoice Inquiry	Meter Readings
	Invoice Central	
	Quick Entry Invoices	Route 1
		NLD BILI
		JSP BILĮ
		1820 BIL
		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

When this option is configured, the value in the Link Type field must be Tyler Menu and the URL field must be directed to the Bill Run AFA program in the Tyler Menu.

*
1
⊕ Select
*
•
Ψ Q
Cancel Save

Selecting the Bill Run AFA option from a card begins the guided process for creating a Utility Billing-CIS bill run directly from Hub without the need to open the Bill Run Process

### program in Enterprise ERP.

Г

= %	Next Year Budgeting	٩	Search		Ø 🔺 🖩 🏮
<b>↑</b> ≡	Modules :	\$578.7M 2020 Total Budget	\$631.2M	Current vs Projected Headcount	Approvals 4
*	General Ledger	Open Vacancies by Department	: Department Request Process	: Budget Approval Deadlines :	Notifications 9
	Projections	Department Carrierd Open Projected Vacan Police 5 16 Fire 1 8	Start a Bill Run	Approval Level Date Date Department 2/1/2020 Review Board 3/1/2020	Alerts 7
	Quick Links	Public Wyrks 3 5 Administration 2 7	Please enter the run type and commitment for the new bill run.	Council 4/1/2020 Mayor 5/1/2020	
	Next Year Budget Entry     Budget Scenarios	Teacher Core         7         15           Support         10         21	Run Type 👻	Adapted 5/1/2020	
	Budget Forecast     Budget Book     Projection Start & Status	Rows per page: 6 💌 1-6 c	Commitment 6 characters remaining		
	Projection Post  Add Quick Link	Salary and Benefits Comparison	Cancel	I Next	
		\$200M			
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	\$150M			man

The step-by-step guided process prompts the user for the details about the bill run to create.

Start a Bill Run	×		_
Please enter the run type and commitment for the new bill run.		Start a Bill Run X	Start a Bill Run X
Start Date 🛗 End Date 🛗		Please enter the fiscal and charge code years for the new bill run.	Please enter additional information for the new bill run.
Bill Date 📩 Mail Date 🛱		Fiscal Year	Bill Cycle 🗸
Due Date 📅 Penalty Date 📅		Charge Code Year	High Warning %
Back Cancel N	ext	Back Cancel Next	Low Warning %
			Back Cancel Next

When all required information has been provided, the program displays a review screen of the details entered. At this stage, the Back buttons are available for returning to previous screens to change any of the details.

Start a Bill Run	×
Please review your bill	run details before running it.
Run	
Start run type Monthly	Commitment DMO
Dates	
Start date 4/3/2021	End Date 5/2/2021
5/2/2021 Low	Mail Date 5/2/2021
Due Date 5/24/2021	Interest Date 5/25/2021
Years	
Fiscal Year 2020	Charge Code Year 2020
Additional Bill Cycle	
3	
High Warning %	Low Warning %
200	50
Back	Cancel Finish

Clicking Finish starts the bill run and provides a link for opening the Bill Run Process program in Utility Billing.

You successfully sta	rted a new bill run.
Close	in Utility Billing

## **Bill Run Process, UB Settings**

### 2021.5

Jira Number: MUN-421766

**Purpose:** To provide an option for prorating flat services by stop date in regular bill runs that use the previous read date.

Client Suggestion: Yes.

Estimated PACE Training Time: Less than <sup>1</sup>/<sub>2</sub> day.

**Description:** On the Site Options 1 tab in UB Settings, the Prorate From list is updated to include the Previous Read/Stop Date option. This proration method is useful for cases when a flat service is stopped in mid-cycle.

Settings	¢ 0 😶
X X X Close Accept Cancel	
Settings > 🖍	
Site Info Site Options 1 Site Options 2 Site Options 3 Assessment Options 0ptional Fea	ature Display Auto Turnon
General	Processing
Parcel number mask	Process by Account/CID 👻
Parcel using location	Estimate/Average by Account/CID -
✓ Update general ledger (GL)	Apply credits by Account
In Budget plan	Calculate late on Current bill -
Use backflow inspector codes at the device level	Proration
Calculate interest up to special condition start date	Prorate from Initial/final only
Deposits through misc receipts	Prorate zen Cycle end date
Exclude charge option in billing	Liens Previous read date
Meter estimate warning	Process option Previous read date/stop date
Cumulative flat inventory required	Debi Initial/final only
Meter inventory	Annualized b Initial/final/stop date
Require meter size	Start date Initial/final/stop by cycle days
Store rate step detail information	Start new customer at tier 1
Prompt for calc-all upon completion of generate charges	Deposit
Require reason code for update/delete in Current Read/Consumption	Denositraniana

The Calculate Charges and Bill Adjustments portions of the Bill Run Process are updated to use this proration method. When it is enabled, charges are prorated using the over/under proration method at the specified rate level; however, flat services are prorated unconditionally if the stop date of the service falls within the bill run start and end dates.

## **CSS–Utility Billing, MSS Administration**

### 2020.2

**Jira Numbers:** MUN-325984, MUN-375764 **Purpose:** To provide an option for summarizing utility bills in CSS by summary code. **Estimated PACE Training Time:** Less than ½ day **Description:** In CSS–Utility Billing Administration, the Summarize Bill Detail Items by Rate Summary Code setting is available.

🐝 tyler		
Home		Charge of address information has been submitted for your account from Self Service to MUNIS. If you
Administration		did not initiate this change of address action, you
General		Original account, name and address values:
Administration		Include for Contact only
User Administration		Modified name and address values:
Citizen Administration		Include for Contact only
Application	Global bill display name	Utility Billing
Payments	Formula for Utility Bill "Pay By" date	Interest Date 🔻 - 🔻 1 days
Documents		Suppress display of customer information
Animal Licenses	Consumption History Bills to Display	12 (max. 48)
Business Licenses		
Email	Past Bills to Display	12
Announcements		Summarize bill detail items by rate summary code
General Billing		Include inactive accounts in search results
Motor Vehicle	Daily Consumption Reporting (External)	

When enabled, this setting causes the program to display bill details by the rate summary code assigned in Enterprise ERP Rate Master, and does not display the individual bill lines.

							(0) 🛒	8
Utility Bill Det	/ Billing ail						Account Summary	<u>Manage Bills</u>
rice								
Bill numbe	er 3011							
As of	06/11/2020							
Bill Date	4/1/2020							
Pay By	4/25/2020							
Details for	bill 3011						Payments a	nd adjustments
Descriptio	n of Charge UOM	Current Reading	Previous Reading	Usage	Billed Usage	Billed	Payments and Adjustments	Due
<b>Descriptio</b> MISC	n of Charge UOM	Current Reading 0	Previous Reading 0	Usage 0	Billed Usage 22	Billed \$92.00	Payments and Adjustments \$0.00	<b>Due</b> \$92.00
Descriptio MISC TRASH	n of Charge UOM	Current Reading 0	Previous Reading 0	Usage 0 0	Billed Usage 22 0	Billed \$92.00 \$75.00	Payments and Adjustments \$0.00 \$0.00	Due \$92.00 \$75.00
Descriptio MISC TRASH SUBTOTA	n of Charge UOM GAL	Current Reading 0	Previous Reading 0	Usage 0 0	Billed Usage 22 0	Billed \$92.00 \$75.00 \$167.00	Payments and Adjustments \$0.00 \$0.00	Due \$92.00 \$75.00 \$167.00
Descriptio MISC TRASH SUBTOTA	n of Charge UOM GAL	Current Reading 0	Previous Reading 0	Usage 0 0	Billed Usage 22 0	Billed \$92.00 \$75.00 \$167.00	Payments and Adjustments \$0.00 \$0.00 \$0.00	Due \$92.00 \$75.00 \$167.00 \$92.84
CY MISC TRASH SUBTOTAL INTEREST TOTAL DU	n of Charge UOM GAL L DUE	Current Reading 0 0	Previous Reading 0 0	Usage 0	Billed Usage 22 0	Billed \$92.00 \$75.00 \$167.00	Payments and Adjustments \$0.00 \$0.00	Due \$92.00 \$75.00 \$167.00 \$92.84 \$259.84

## Field Sheet (mobile application)

## 2020.1

**Jira Numbers:** MUN-342649, MUN-346517, MUN-345762, MUN-340964, MUN-304231, MUN-345288

**Purpose:** To make location and contact information available for use on work orders created from the Field Sheet mobile application.

Estimated PACE Training Time: Less than <sup>1</sup>/<sub>2</sub> day

**Description:** The Field Sheet mobile application is updated for improved handling of location and contact information. Changes include the following:

- The Field Sheet home page includes the work order address.
- When you create a new work order from within Field Sheet, you can add citizen contact persons and location information.

ail at&t 🗢	1:12 PM	© 🕫 🖉 84% 💳
	Field Sheet	
	New Work Ore	der
Description*		
Water check in	n median garden	
Requesting Dep	artment*	
WATER · Wate	er department	
No Asset Select	ed	
ASSIGN ASSET	r	ູ່ມີມີ SCAN CODE
Servicing Depart	tment*	
PBWKS · Publ	ic Works	
Activity*		
GARDEN • Gar	den Maintenance	
ADD CITIZEN C	CONTACT	
ADD LOCATION	4	
Requested	Start Date	
Requested	Fnd Date	_
	Cancel	Add

• Users can enter location information either by an address or by the latitude and longitude.

iongitude.	Sector Sector	
HI AT&T 🗢	1:14 PM	@ 🕈 🍯 82% 💷)
	Field Sheet	
Westdands Gall	AND COLOR	Falmo
nt Hill	Falmou	th
	Part	Chil Waites Landing
Esri, HERE, Garmin, M	ETI/NASA, USGS, EPA	, NPS, USDA Power
Address Falmouth, ME 0	4105	
Lat/Long 43.721987606	/ -70.237658203	USE LAT/LONG
	CANCEL	

Jira Numbers: MUN-345323, MUN-335346

**Purpose:** To improve checklist and scheduling information in the Field Sheet mobile application.

Estimated PACE Training Time: Less than <sup>1</sup>/<sub>2</sub> day

**Description:** Checklists and scheduling features in the Field Sheet mobile application are enhanced as follows:

• The Scheduled Date field includes the scheduled time of day as well as the date.

all AT&T 穼	10:18 AM	@ 🕈 🖉 89% 🥅
<	:	
	6832	
Activity LEAK • Hydra	nt Leak	
Approved	Change S	tatus
Scheduled Date 12/16/2019 5:00 AM	Created Date 12/16/2019	
Hydrant Leak Asset HYD-1429 • U	Jnknown	~
Custom Data		~
Assigned To WARREN WE	BBER	

• Checklists in the Field Sheet mobile application are updated to conform with those used in the Utility Billing Field Work program. For each item on the checklist, there are Pass, Fail, and N/A options, and the Description field accommodates more text.

all AT&T 🛜		9:41 AM	@ 🗗 🖉 92% 🔲
<	Fie	ld Sheet	1
	C	6739	
Check Oil I	_evel	neckiists	
Oil was jus	t checked	yesterday 🧪	•
O Pass	🔿 Fail	ON/A	
CLEAN MA	ATS		
🥝 Pass	🔿 Fail	⊖ N/A	
VACUUM			
Pass	🔿 Fail	◯ N/A	
Work	Order		

• In addition, web services for the Field Sheet mobile application are modified to support the updated work order checklists.

Jira Numbers: MUN-362124, MUN-289510

**Purpose:** To make custom fields available in the Field Sheet mobile application. **Estimated PACE Training Time:** Less than ½ day **Description:** Work orders created from the Field Sheet mobile application include any custom fields that have been configured as required in Enterprise ERP programs.

📲 AT&T 🗢	9:37 AM	@ 🕈 🖉 89% 🔲							
	Field Sheet								
N	ew Work Ord	er							
No Asset Selected									
ASSIGN ASSET									
Servicing Departm	ent*								
GARGE • City Ga	rage								
Activity*									
BRAKE • Brake jo	do								
ADD LOCATION	NIACI								
Requested S	tart Date								
Requested E	nd Date								
🗹 Assign to me	9								
Custom Data		^							
Project Id*									
State Project (P	atrol Supervis								
	Cancel	Add							

## Rate Codes, Calculate Charges, Bill Adjustments

### 2021.4

Jira Number: MUN-422441

**Purpose:** To provide a rate code for use in issuing sewer volume credits for accounts with multiple condominium units.

### Client Suggestion: Yes

**Estimated PACE Training Time:** Less than <sup>1</sup>/<sub>2</sub> day.

**Description:** Calculation code 55 - Condo Unit Volume Credit is available for use in the Rate Codes program.

🐝 Rates	
X / X	Cancel
Rates > 🌶	
Charge code * Rate code *	GZSEW         ···         VOLUME CREDIT           STND         ···         STANDARD RATE CODE
Effective date *	01/01/2021  Calc code * 55 ··· CONDO UNIT VOLUME CREDIT

Enterprise ERP, *powered by Munis*® Enterprise Utilities Major Enhancements 2020-2021 This code is intended for use when the service type of the rate is O - Based On Other. It allows organizations to issue sewer volume credits for accounts with multiple condominium units when the total consumption for units falls under an allotment of three times the number of condominium units.

For rates that use this calc code, the UOM field is automatically populated with 3, and the UOM Allowance field is populated with 3 as the number of gallons per condominium unit.

🐝 Rates			• •	00
X V Society Carcel				
Rates > /				
Rates				
Charge code * GZSEV	W ··· VOLUME CREDIT			
Rate code * STND	D STANDARD RATE CODE			- 11
Effective date * 01/01	1/2021 🗂 Calc code * 55	CONDO UNIT VOLUME CREDIT		- 11
General Average	e/Surcharge Demand			
General processing		Additional		
Summary code * S -	- SEWER *	UOM * CRED		
Service type * O	- SERVICE BASED ON OTHER +	Babe/flat .00		
Charge type	- SERVICE	Prorate N-NO PRORATION		
Rate effective - R	- READ DATE	Discount Taxable		
Ubsoiete	Use drought rates	Charge amount min .00 Max .00	Bill min	h over c
Averacion		Based on other GZWAT Other # per		
Averaging		Use variable interest rates		
Evoluda hish/law		Interest rate		
		Number of bills		
		Average payment plan		
		Usage high warning %		
		Usage low warning %		
Usage		Default bill cycle		
Default		Derault deposit		
Seasonal minimum		Description and the second sec		
Previous compares		Default late fee charge		
High usage for zero average		Default subjection		
Minimum billed usage	0	U0M allowance 3		
Apply factor and bill min as fixe	ed usage	Estimate maximum 0		
Exclude from multi-meter		Use consecutive zero usage processing number of consecutive months 0		
Linenationan	man man	man man man was and man man	$\sim$	~

Calculation processes in the Calculate Charges and Bill Adjustments programs are updated to multiply the number of condominium units by the allowed usage from the rate and then subtract the billed usage from the water service. For amounts greater than zero, the difference is divided by the unit of measure value from the rate. The results are rounded down to the nearest whole number and multiplied by the rate from the rate table.

## **Rate Masters**

### 2020.1

### Jira Number: MUN-324038

**Purpose:** To enhance the guided Rate Definer feature with a Mass Copy/Mass Update function that allows percentage increases on base amounts and rate tiers.

### Estimated PACE Training Time: Less than <sup>1</sup>/<sub>2</sub> day

**Description:** In the Rate Masters program, clicking the Guide Me Rate Definer option on the toolbar opens the Rate Definer guided conversation. The Rate Definer provides a series of dialog boxes that prompt you to define the rate and the rate details. Selecting the Mass

Copy/Update option allows you to choose whether to copy multiple rates, update multiple rates, or both.



Modifying rates using the Mass Update or the Mass Copy & Update option provides a way to update multiple utility billing rates at one time and apply percentage increases to base charge amounts and rate tables.

😑 🤸 Utility Billing Rate Definer					¢ 6	
						EXIT
What would you like	e to update fo	r these rate	es?			
Fields	Rate Increa	se Percenta	age			
- Effective Date	0.3000 %					- 1
Rate Increase						- 1
Rate Discountable	Rates	ove				
Rate Taxable	Charge Code	Rate Code	Effective Date	Rate Table		- 1
High Warning Percentage	1CONNE	STND	01/01/2005	0		
Low Warning Percentage	IREPLA	STND	01/01/2005	0		
Base/Flat Increase	1TRNOF	STND	01/01/2005	0		
	1TRNON	STND	01/01/2005	0		
Base/Flat Discountable	68LATE	STND	01/01/2010	0		
Base/Flat Taxable						
Proration Method						
€ BACK					CON	ITINUE

## Rates, Miscellaneous Charges, Services

### 2021.2

### Jira Number: MUN-384222

**Purpose:** To modify existing subject-to functionality to allow a charge such as a fee to be defined for a specific charge code or range of charge codes.

Estimated PACE Training Time: Less than 1/2 day.

**Description:** The Default Subject-To option is added to the Rates program to allow selection of a specific subject-to charge to use as the default charge each time a new record using the

### rate is added to an account.

Let Let	🐝 Rates	¢ 0 00
Rates	X Q III + X II Delete Output Print Display PDF Bav	e Email Schedule Attach Government Copy://Deere Availability
Bate   Charge code *   Bate code *   Bate code *   Ceneral Average/Surcharge Demand Drought   Summey code *   Summey code *   Surder spatiation   Construction   Construction   Construction   Surder spatiation   Construction   C	Rates	
Charge code * Rate	Rates	1
Rate code*   Effective date*   Ceneral Average/Surcharge Demand Drought   General Average/Surcharge Demand Drought   Summary code *   Base/Flat   Obarge space   Obarge space   Obarge space   Obarge space   Obarge space   Desolate   Use drought rase   Obarge space   Desolate   Usege holynewring %   Usage holynewring %   Default Holl cycle   Previous compares   Holy usage for zero everage   Minnum bild usage   Minnum bild usage   Minnum bild usage   Minnum bild usage	Charge code * ····	
Effective date* Calc code *   General Average/Surcharge Demand Drought Odditional   Summary code *	Rate code * ····	
General Average/Surcharge Demand Drought     General processing Additional     Surmary code * U/U/* U/U/#        Surmary code * U/U/* U/U/#        Surmary code * U/U/* U/U/#        Surmary code * U/U/* U/U/#     Surmary code * U/U/* U/U/#        Surmary code * U/U/* U/U/#        Surmary code * U/U/* U/U/#        Surmary code * U/U/* U/U/#        Surmary code * U/U/* U/U/#        Surmary code * U/U/# U/U/#        Surmary code * U/U/# U/U/#           Surmary code * U/U/#                 Surmary code * U/U/# <td>Effective date * 🖸 Calc code * …</td> <td></td>	Effective date * 🖸 Calc code * …	
General Average/Surcharge Demand Drought     General Average/Surcharge VOM * UOM deec *     General UOM * UOM * UOM deec *     Service type* V Base/fat     Charge type* V Procrate     Base affective * V     Obsolete Use drought rates        Averaging     Average payment plan        Usage high varning %   Usage loov varning %   Usage for zero average		
General processing Additional   Summary code * UON *   Service type * UON *   Charge type Porate   Porate Image type   Base offat Image type   Obsolete Image type   Obsolete Image type   Obsolete Image type   Obsolete Image type   Averaging Image type   Method * Image type   Method * Image type   Sculde high low Image type   Usage log warning % Image type   Usage log	General Average/Surcharge Demand Drought	
Summary code * UOM * UOM dece *   Service type * See/fat   Charge type Inscount   Base effective * Inscount   Obsolete Use drought rates   Obsolete Use drought rates   Averaging   Max   Averaging   Max   Average agrument plan   Usage logb warning %   Usage logb warning %   Usage logb warning %   Default   Default   Default   Seasonal minimum   Previous compares   Uffundum   Usage   Default lise fee charge   Obsolete   Uffundum billed usage   Minimum billed usage	General processing	Additional
Service type * • Base/flat   Charge type • •   Rate effective * • •   • Discount •   • • •   • Discount •   • Discount •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • • •   • •<	Summary code *	UOM * UOM desc *
Charge type   Rase effective *   Base effective *   Base do nother     Averaging     Averaging     Maximum   Made *   Per   Based on other     Based on other     Other # per     Averaging     Method *     Average payment plan     Based on other     Usage lob warning %     Usage lob warning %     Default bill cycle     Usage compares     Default deposit     High usage for zero average     Utage lob warning %     Usage lob warning % </td <td>Service type *</td> <td>Base/flat</td>	Service type *	Base/flat
Rate effective *     Desolete     Desolete <td>Charge type</td> <td>Prorate</td>	Charge type	Prorate
Obsolete Use drought rates   Charge amount min Max   Averaging Based on other   Method * ***Per   Sciolde high/low ***Per   Based in other Other # per   Mathod * ***Per   Sciolde high/low ***Per   Based on other ***Other # per   Mathod * ***Per   Sciolde high/low ***Per   Based on other ***Other # per   Mathod * ***Per   Sciolde high/low ***Per   Based on other ***Other # per   Mathod * ***Per   Sciolde high/low ***Per   Based on other ***Other # per   Mathod * ****Per   Sciolde high/low ************************************	Rate effective *	Discount Taxable
Averaging     Method *     Method *     Average payment plan     Busge high warning %     Usage low warning %     Usage     Default bill cycle     Default Cycle     Default Cycle     Default Cycle     Previous compares     Usage     Default lase fee charge     Uon allowarce     Uon allowarce     Average payment plan     Other # per     Usage low warning %     Default Dycle     Usage     Default Cycle     Default Lise fee charge     Uon allowarce     Uon allowarce     Apply factor and bill min as fixed usage     Default subject-to     Uon allowarce     Exclue and bill min as fixed usage     Default subject-to     Uon allowarce     Exclue analyment     Exclue analyment     Default subject-to     Uon allowarce     Exclue analyment     Exclue analyment     Exclue analyment     Exclue analyment     Default subject-to     Uon allowarce     Exclue analyment     Exclue analyment <td>Obsolete Use drought rates</td> <td>Charge amount min Max</td>	Obsolete Use drought rates	Charge amount min Max
Method * * * Per   Method * * * Per   Exclude high/low Usage high warning %   Usage low warning % •   Usage •   Usage •   Usage •   Default lill cycle •   Default deposit •   Default ecode •   Previous compares •   High usage for zero average •   Minimum billed usage •   Uow allowance •   Default as fixed usage •	Averaging	Based on other ···· Other # per
Average payment plan	Mathad t	
Usage high warning % Usage low warning % Usage	Exclude high/low	Average payment plan
Usage low warning % Usage		Usage high warning %
Usage     Default bill cycle     Image       Default     Default deposit     Image       Seasonal minimum     Deposit rate code     Image       Previous compares     Default late fee charge     Image       High usage for zero average     Image     Image       Minimum billed usage     Image     Image       Apply factor and bill min as fixed usage     Image     Estimate maximum		Usage low warning %
Default     Deposit rate code       Seasonal minimum     Deposit rate code       Previous compares     Deposit rate fee charge       High usage for zero average     Default subject-to       Minimum billed usage     UOM allowance       Apply factor and bill min as fixed usage     Estimate maximum	Usage	Default denosit
Seasonal minimum     Deposit rule	Default	Deposit rate code
Previous compares     Default iate fee charge       High usage for zero average     Default subject-to       Minimum billed usage     UOM allowance       Apply factor and bill min as fixed usage     Estimate maximum	Seasonal minimum	Deposit rule ····
High usage for zero average Default subject-to UDM allowance Apply factor and bill min as fixed usage Estimate maximum	Previous compares	Default late fee charge 🗸
Minimum billed usage     UOM allowance       Apply factor and bill min as fixed usage     Estimate maximum	High usage for zero average	Default subject-to
Apply factor and bill min as fixed usage Estimate maximum	Minimum billed usage	UOM allowance
	Apply factor and bill min as fixed usage	Estimate maximum

This option provides a convenient method for calculating a sales tax or fee on any applicable service or miscellaneous charge.

If a default subject-to charge is defined on a rate in the Rates program, it is automatically selected in the Miscellaneous Charges and Services programs for any new records for which that rate applies.

Subject-to charges for your organization are established on the Subject-To Charges/Credits screen of the Utility Billing Settings program.

### **UB Work Orders/Print**

### 2020.1

### Jira Number: MUN-324538

**Purpose:** To update Enterprise ERP Utility Billing work orders to use standard Enterprise Asset Management assignee categories and any custom assignees that are configured in Enterprise Asset Management.

Estimated PACE Training Time: Less than 1/2 day

**Description:** On Utility Billing work orders created from within any Utility Billing programs, the Assign To field on the UB Work Orders/Print screen includes the Custom category in addition

Kork Orders   Work Order number   Type *   CON - CONNECT METER   Reason *   ON - TURN ON   Account   O01001   Parcel   001002000000   Location   23 BAY AVE   Prop desc   Primary svc   WAT058   NEPT   8850406   Install date   Other meter   Employee   90   milzzo, FRANK	Entered *	12/12/201
Work Orders           Work order number           Type *           CON - CONNECT METER           Reason *           ON - TURN ON           Account           001001           Parcel           001002000000           Location           23 BAY AVE           Prop desc           Primary svc           WAT058           NEPT           8850406           Install date           Other meter           Employee           90           RIZZO, FRANK	Entered *	۲ 12/12/201
Work order number         I           Type *         CON - CONNECT METER           Reason *         ON - TURN ON           Account         001001           Parcel         001002000000           Location         23 BAY AVE           Prop desc	Entered *	12/12/201
Type *         CON - CONNECT METER           Reason *         ON - TURN ON           Account         001001           Parcel         001002000000           Location         23 BAY AVE           Prop desc	•	
Reason *         ON - TURN ON           Account         001001           Parcel         001002000000           Location         23 BAY AVE           Prop desc	•	<b>`</b>
O01001           Parcel         001002000000           Location         23 BAY AVE           Prop desc		· · · · · · · · · · · · · · · · · · ·
Parcel         001002000000           Location         23 BAY AVE           Prop desc		
Location 23 BAY AVE Prop desc Primary svc WAT058 ···· 1 WATER 5/8" Read meter/item NEPT 8850406 Install date Other meter Customer 90 ··· RIZZO, FRANK		1
Prop desc Primary svc WAT058 ··· Read meter/item NEPT 8850406 Install date Other meter Employee Customer 90 ··· RIZZO, FRANK		
Primary svc WAT058 ···· 1 WATER 5/8" Read meter/item NEPT 8850406 Install date Other meter Customer 90 ···· RIZZO, FRANK		ç
Read meter/item     NEPT     8850406       Install date     None     7/01/1999     # Dials     4     Remote I       Other meter     Employee		🗖 Meter/
Install date None 7/01/1999 # Dials 4 Remote I Other meter Employee 90 ···· RIZZO, FRANK	5/8"	
Other meter Employee 90 ···· RIZZO, FRANK	D	Z
Customer 90 ···· P RIZZO, FRANK		(
Crew		Ç
Approved by	•	
Requesting dept * Vendor OFFICE		
Servicing dept * Custom VORKS	•	
Assign to None  Assignee		<
		Ş

to the standard categories of None, Employee, Crew, and Vendor.

Selecting the assignee category of Custom in the Assign To field makes the list of any custom assignees that have been established in your organization's Asset Maintenance Setup Center

### available in the Assignee field.

😑 🤸 ОВ	Work Orders	/ Print							٠	?	D						
←	Cancel																
Read meter/iten	n NEI	T	8850406				5/8	3"				~					
Install date	07/	01/1999		# Dials	4	Remote II	D				s						
Other meter											E	, t					
Customer		90		RIZZO, FRA	NK						R	>					
Approved by								•	_		4						
Requesting dept *	CO - CENTRAL C	FFICE						•			Ę	6					
Servicing dept *	PW - PUBLIC WO	RKS		G				•			Į	2					
Assign to	Custom 💌	Assigne	e									}					
Priority			🀝 As	signed t	o Custe	om Assi	gnee	Help				<u>.</u>		-	\$	?	D
		← Back	Accept	Cancel	Q Search	⊖ Output	Print	<b>O</b> Display	PDF	Save		Excel	Word				
		Id	- D	Name													
		1		Truck 1													
		2		Truck 2													
		3		Truck 3													
		Search /	Filter												Rec	ord	
		Q	<b>v</b>	7 <sub>×</sub>				~			-	60	<	>	1	1 01	f 3
																	_

The Work Order/Service Order Assignees program that was previously used to maintain the list of available assignees for UB work orders is removed from Utility Billing.

Note that the TECH code type that was used to create assignee codes in previous versions of Utility Billing is removed from the Utility Billing Miscellaneous Codes program. This functionality is replaced by the Asset Maintenance Setup Center's assignee categories and assignees.

**Important:** Upgrading to Enterprise ERP version 2020.1 includes a required UB Assignee Migration Setup process that moves your organization's existing UB TECH code assignees to the new Enterprise Asset Management assignee categories.

In the UB Assignee Migration Setup program, you can select the Enterprise Asset Management assignee category to which an existing UB TECH assignee code is mapped. Any unmapped TECH codes for which you do not make a selection are mapped to the new Custom Assignee category. The migration setup program keeps any TECH assignee codes that had been associated with a specific employee in the earlier UB Work Order Assignees program

### mapped to that employee.

\$	UB Ass	ignee N	/ligratio	n Setup	•						٥	8	6	
<b>Æ</b> Back	Update	Info	Add Crew	User Attributes	Crew and Labor Codes	UB Work Order Assignees								
UB Tech	Code	Tech Code	Status Ass	signee Cate	gory Er	nployee Number	Crew Number	Vendor Number	Custom Assignee	Description				
001		Inactive	Cu	stom					001	VAN 001				
01		Active	Em	ployee		95110				RLT EMP95110				
02		Active	Cu	stom					02	GE 2				
BECK		Inactive	Cu	stom					BECK	Beckys work code				
CLS		Inactive	Cu	stom					CLS	CHRISTINES TEST CODEI 11/30/01				
DWN		Inactive	Cu	stom					DWN	dougs so assignee				
FW		Inactive	Cu	stom					FW	FIELD WORKER				
GK		Active	Em	ployee		95110				RLT EMP95110				
1NS3		Inactive	Cu	stom					INS3	inspector3 assignment code				
JOES		Inactive	Cu	stom					JOES	JOE SMITH				
JSP		Active	Cu	stom					JSP	JENNIFER PARAMORE				
KARE		Inactive	Cu	stom					KARE	Karen Bullinger				
MSDD		Inactive	Cu	stom					MSDD	MSDESCRIPTION				
NICK		Inactive	Cu	stom					NICK	Nick Huots Assignee code				
NPC		Inactive	Cu	stom					NPC	NORMAN CLOUTIER				
SAM		Inactive	Cu	stom					SAM	Sample Person				
SETH		Inactive	Cu	stom					SETH	Seth Putnam				
WORK		Inactive	Em	ployee		95110				RLT EMP95110				
4													k	÷

# **System Administration/Roles**

## Roles

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

## 2020.1-2021.1

There were no role or permission changes for 2020.1-2021.1.

## **2021.2**

Jira Number	Permission	Description					
Utility Billing							
MUN-408884	Reset Generate AR in Progress Flag	Grants role assignees permission to reset the In Progress status of the Generate AR stage of the Bill Run process, when enabled.					

## 2021.3-2021.5

There were no role or permission changes for 2021.3-2021.5.