Banyon Data Systems

PROPERTY MANAGEMENT

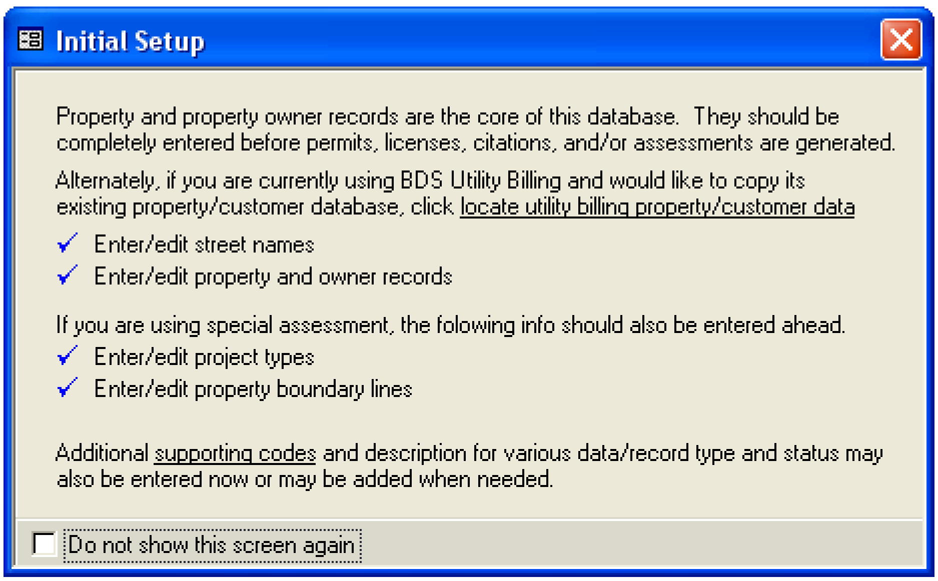
(Includes Zoning Violation / Complaint Module)

PROPERTY MANAGEMENT SETUP

BDS Property Management is an MODULE BUILDING data collection system capable of managing special assessments, permits, licenses, pet licensing, cemetery management, zoning violations and citations for its property and owner/customer databases. These applications are sold separately, but each, require the Property Management software system.

The amount of initial data entry to establish the base of this database is massive and can be time consuming. Data conversion from text file, spreadsheet, or another data structure is a quick means to jumpstart the data building process.

Below is the Initial Setup screen to aid you in this process. Even when the data is built from a conversion, a walk through inspection of data integrity is recommended. Simply click on the item you wish to revisit.



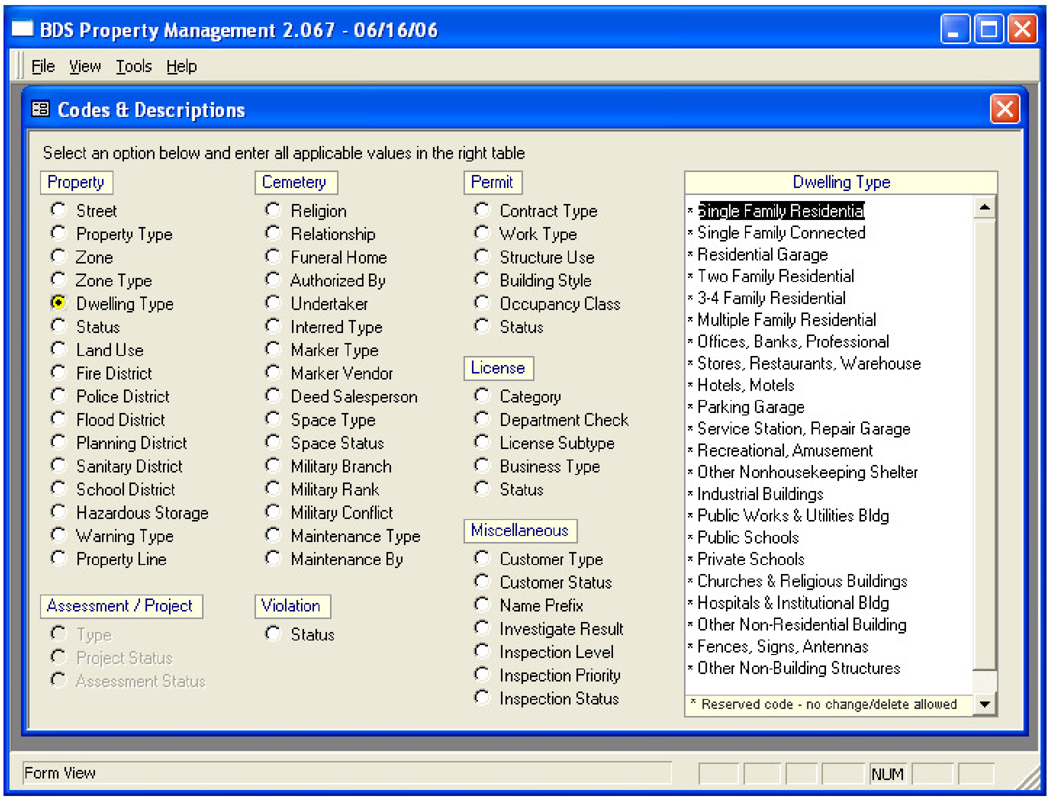
The four items shown above with blue check marks (indicating complete or in progress) are crucial and work as the base for the rest of the data growth.

This is the first screen you will always see after the password entry. As you become more familiar with the above basic information and regular updates to it are no longer a daily task, check the Do not show this screen again to disable it in the future. You will still be able to get to this type of information via another menu option.

If you do have to enter property and owner data from scratch, refer to Property and Owner Records Manual Entry

Setup Codes and Descriptions

To access the Setup Menu, you must click on the Tools menu option at the top of the screen and then select Setup Options menu item and then click on Setup Codes and Descriptions. The screen shown below will be displayed.



Setup of Codes and Descriptions is a collection of valid data items to be used in property records, permits, licenses, citations, projects, and assessments. Enter values for the type of application you are using the software for.

If the Permit and/or Licensing module are not being used, you can skip these areas.

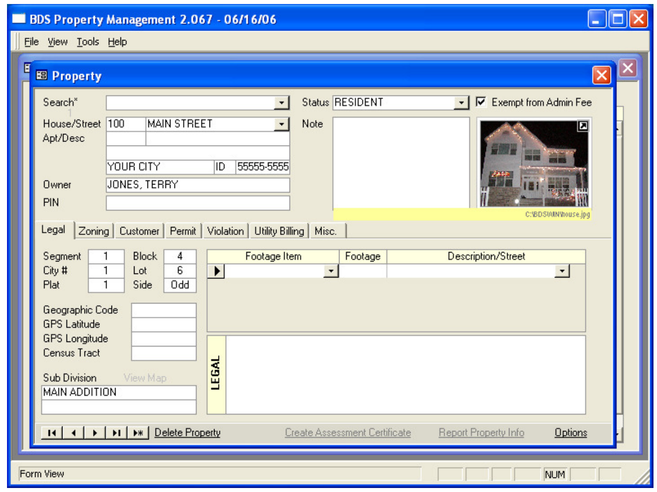
Some data types have reserved values that are not changeable - additional values can be added. These values will become available from pick lists as you are building records for properties, customers and others. You will also be able to add new values on the fly as you are building these records.

Besides simple codes and descriptions, depending on the specific application, there are additional setups.

PROPERTY INQUIRY SCREEN

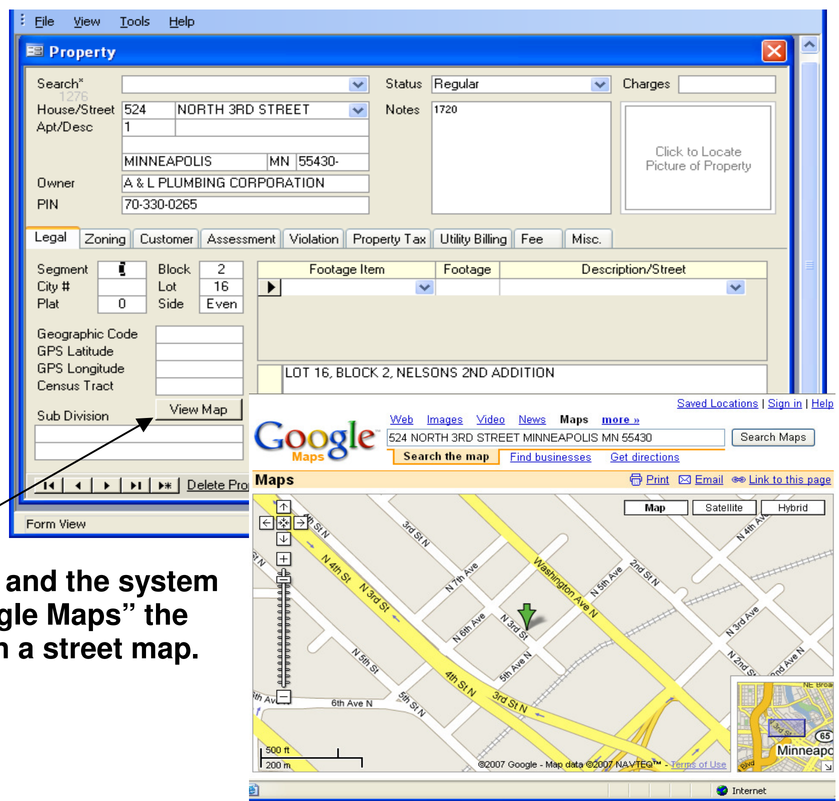
To access the Inquiry Screen, click on the View menu option at the top and select Inquiry and choose the Property item.

You can enter a search by property address, ID, or PIN. Please note that the Legal, Zoning, Customer, Violation and Misc Tabs shown above will be shown when you have purchased the Property Management system. This manual discusses the Zoning Violation Module. The other tabs will only be shown if purchased separately and interfaced to the Property Management system.



The **Legal tab** of the Property screen has important data in regards to the assessment calculation, and property footages. It also contains information on property selection such as segment, block, lot, side, and so on. This type of info will be useful when you want to confine your assessments to particular part of town, block, or side of the street.

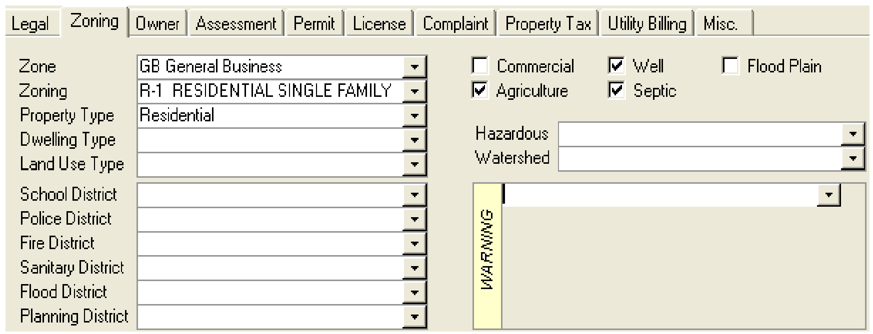
In the XP version (5.07 or higher) of the software you will find a new link to view a map on the Legal Tab. Click on the button "View Map" and the system will then display via "Google Maps" the location of the property on a street map.



Google Maps is a registered trademark of Google, Inc.

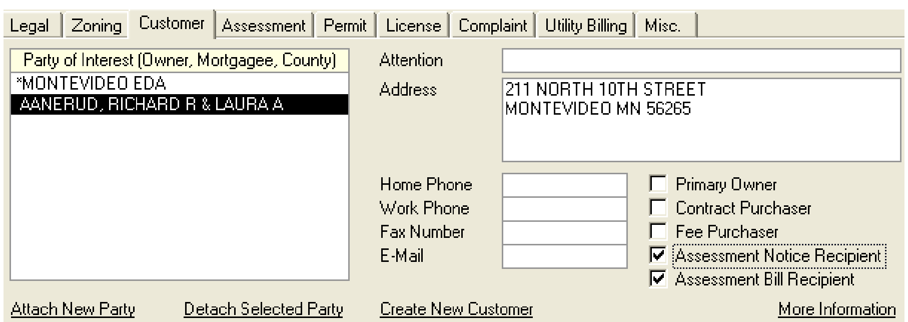
The **Property Footage** table must have the correct footages. Adjustment to footage can be made individually by assessment.

Values in the Boundary column of the Footage table are defined in the Property Line section of the Codes & Description Setup. They are criteria used in the calculation of the assessment. The Footage is the <u>assessable</u> footage. Description/Street is the adjacent street the footage is based on.

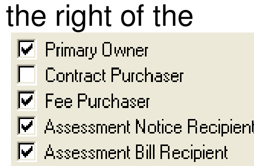


Zoning tab provides additional space for zoning and district information. The Warning list may have virtually unlimited entries. These fields may be used for assessment selection or for permit and/or license warnings. Available values are pre-defined in the Codes and Descriptions Setup. The system will recognize and accept new values.

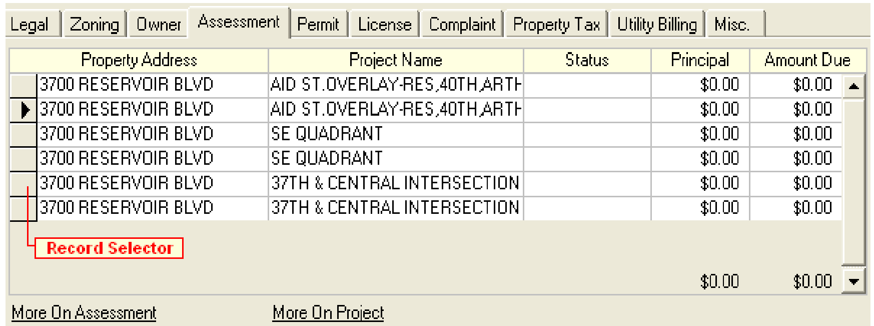
The **Customer tab** contains basic info about the people and companies associated with a property. All associated customers /owners are listed in the Customer/ box.



The primary entry is marked with an asterisk (*). The information display to the right of the list box pertains to the highlighted customer/owner. Address and Phone can only be changed via the Customer screen. You can, however, check the option boxes for each listed customer/owner. To change primary ownership to a different owner, first select that owner then check Primary Owner.



To maintain the customer/owner list box, use Attach Customer, Remove Selected Customer, and Create New Customer. To learn more on the selected owner, click on More Information.

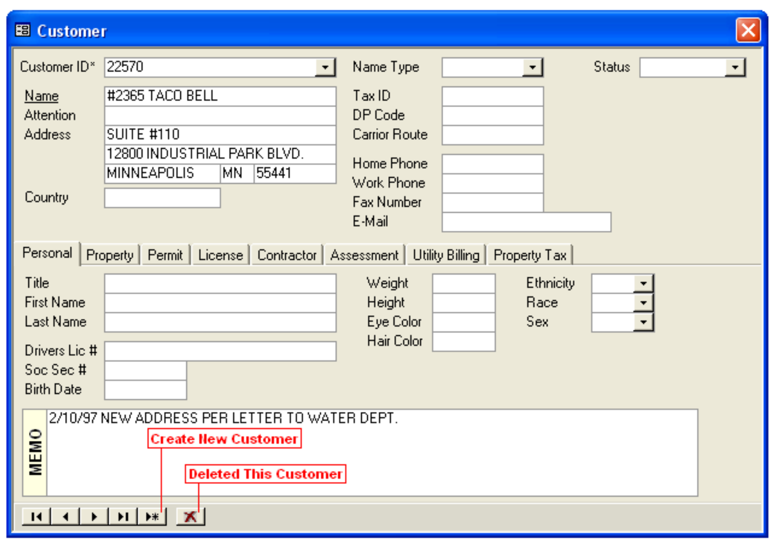


CUSTOMER INQUIRY SCREEN –add on modules

The Property Management system has several essential add on modules that may be purchased from Banyon Data Systems. They include, Special Assessment, Permits, Licenses, Violation/Complaint, Cemetery, and interfaces with Banyon Data Utility Billing software.

The Property Management customer database interfaces with the above modules as they are added to the system.

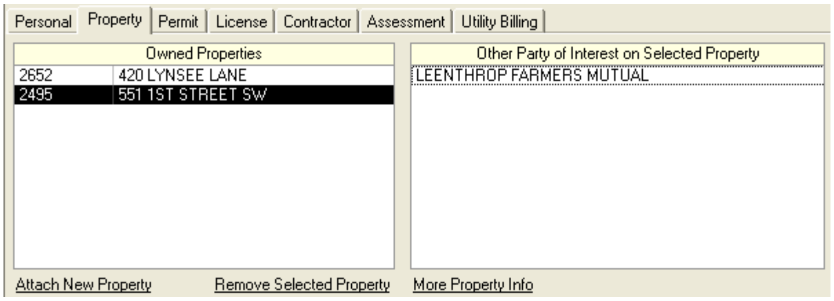
The customer screen or record has basic information on customer address and phone. The naming format for personal names is last name comma first name. If there are two lines for the address, put the street address on the first line. This will improve the system search. To search for a customer, in the Customer ID field, enter, the customer ID, customer name, address, or address PIN. Use wildcard for partial lookup.



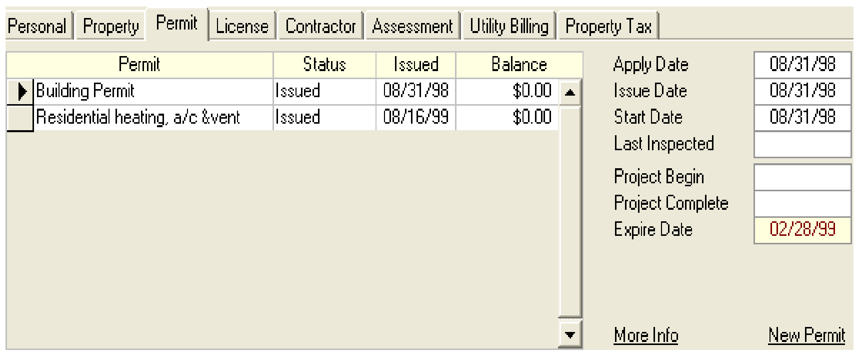
Note: To change the name of a customer click on the underlined text Name that appears to the left of the customer name field.

The bottom half of the customer screen has additional information pertained to the displayed customer record. The **Personal tab** is especially applicable to contractors and license holders.

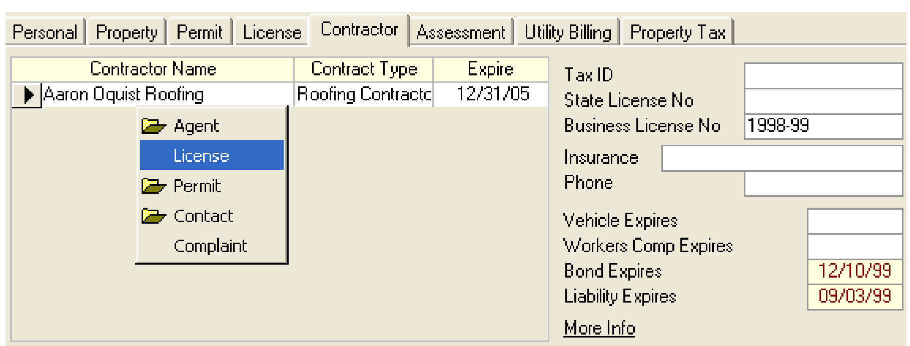
The **Property tab** lists all properties associated with this customer. The customer list shows other owners of the currently highlighted property. Additional properties can be added by a left clicking on Attach New Property. If the selected property was sold and needs to be removed from the list, click on Remove Selected Property.



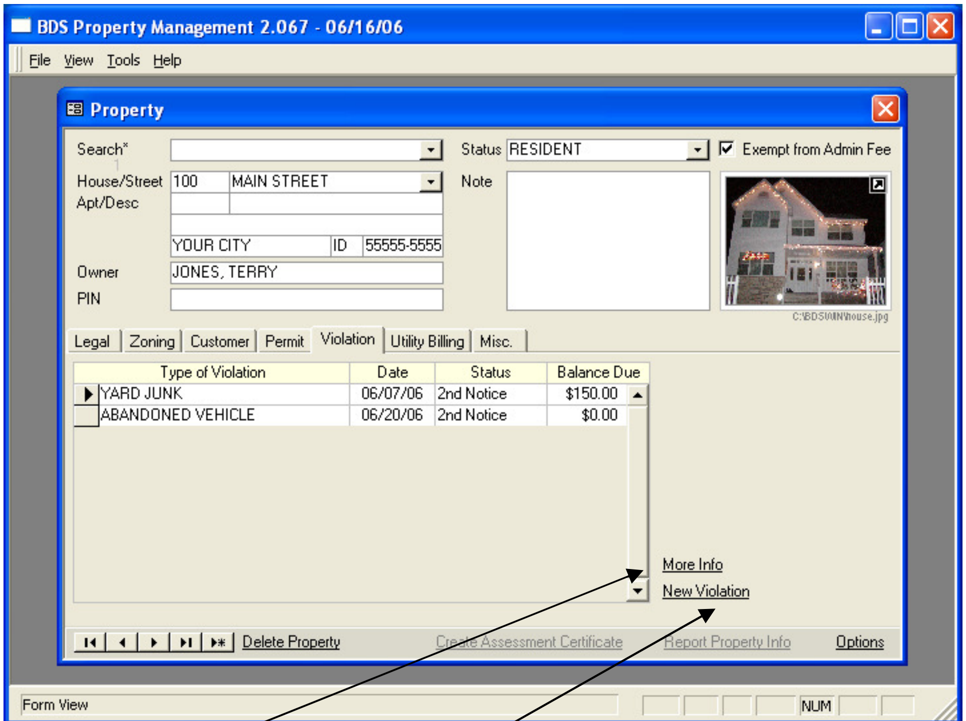
Similar to the Property screen, the **Permit and License tab** has summary info on all permits and licenses applied for the property. You can also start a new permit and license application directly from the Customer screen by clicking on New Permit or New License respectively. A click on a permit or license will give you shortcuts to their inquiry screen.



If the customer is a contractor, the **Contractor tab** will give you some basic licensing info on the contractor. Click on More Info for shortcuts to the Contractor Inquiry screen.



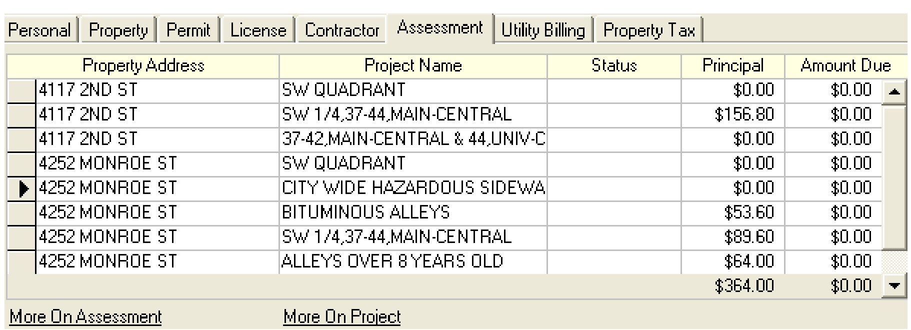
Violation tab shows you the Zoning Violation list or table where you can examine the violations or complaints on the property owner, perpetrator or current resident. To utilize this tab, you should have already entered the Zoning Violation / Complaint Module setup fields. (See next page for Zoning Violation Module Setup).



Click on More Info to see specific details for the attached violations or complaints. May also be accessed to process payment for fines or to print notices that have been user defined and entered in the modules setup.

Click on the New Violation to add a violation to the subject property or customer.

The **Assessment tab** lists all assessments for all properties associated with this customer.

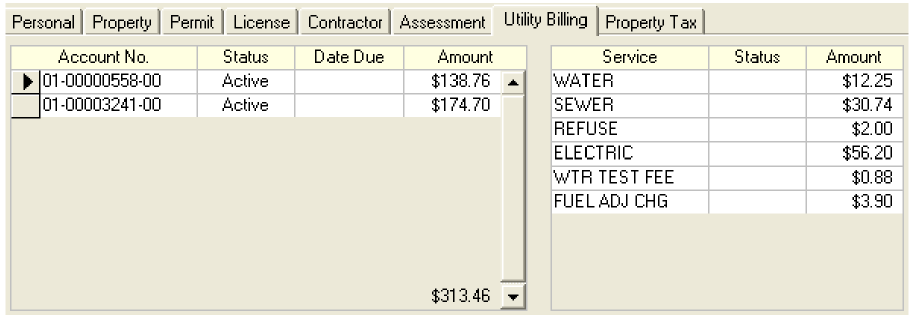


Personal | Property | Permit | License | Contractor | Assessment | Utility Billing | Property Tax

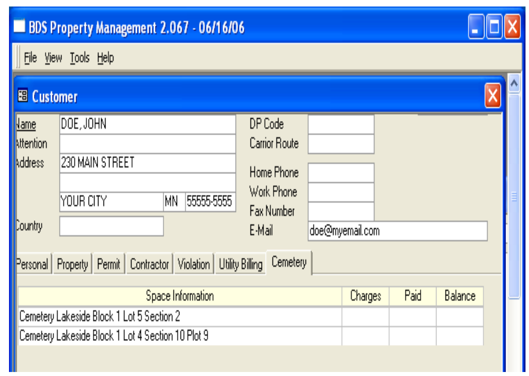
Property Address	Project Name	Status	Principal	Amount Due
4117 2ND ST	SW QUADRANT		$0.00	$0.00
4117 2ND ST	SW 1/4,37-44,MAIN-CENTRAL		$156.80	$0.00
4117 2ND ST	37-42,MAIN-CENTRAL & 44,UNIV-C		$0.00	$0.00
4252 MONROE ST	SW QUADRANT		$0.00	$0.00
4252 MONROE ST	CITY WIDE HAZARDOUS SIDEWA		$0.00	$0.00
4252 MONROE ST	BITUMINOUS ALLEYS		$53.60	$0.00
4252 MONROE ST	SW 1/4,37-44,MAIN-CENTRAL		$89.60	$0.00
4252 MONROE ST	ALLEYS OVER 8 YEARS OLD		$64.00	$0.00
			$364.00	$0.00

More On Assessment   More On Project

The **Utility Billing tab** lists all billing info of all accounts for properties associated with this customer.



The Cemetery tab provides access to the Cemetery software module. If a customer has cemetery sites the list will show on the table. Again, the Cemetery software module is purchased separately but directly interfaces to the Banyon Data Property Management and POS software systems.

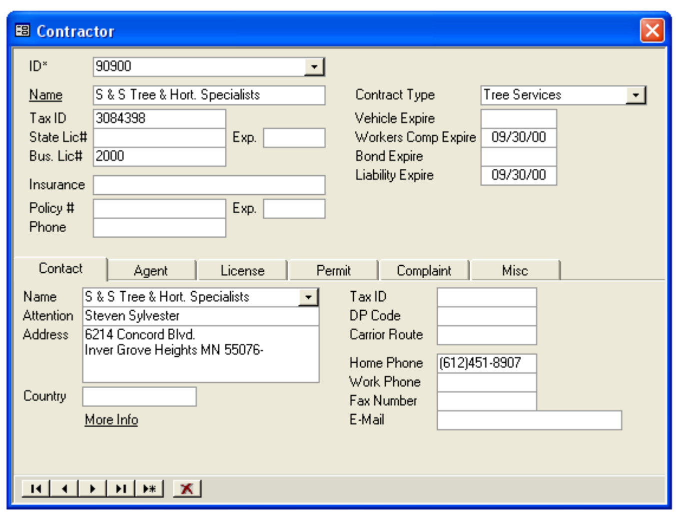


CONTRACTOR INQUIRY SCREEN

Customers who are also contractors have special screen to store this additional type of information.

The contact tab has information that ties back to the customer screen. The Agent tab lists basic employee information such as company position and contact phone #.

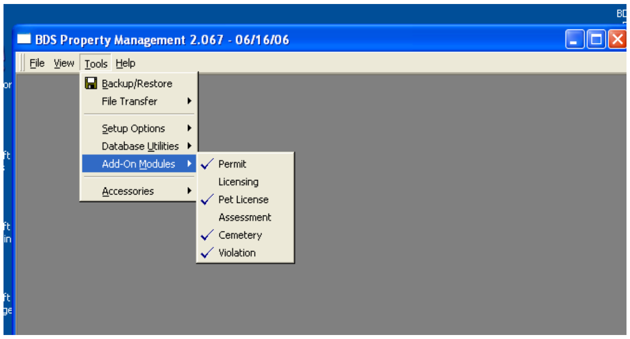
The License and Permit tab lists license info and permits pulled by the contractor.



ZONING VIOLATION / COMPLAINT MODULE

This module is included with the Property Management system. Make sure this module is turned-on by clicking on Tools menu item in the upper left hand corner and highlight the Add-on Modules menu item. The submenu will show available modules, but the Violation menu item should have a check mark on the left side. If not, call Banyon Data Systems and we will turn the module on.

Other modules listed will only be checked if purchased as separate modules from Banyon Data Systems.

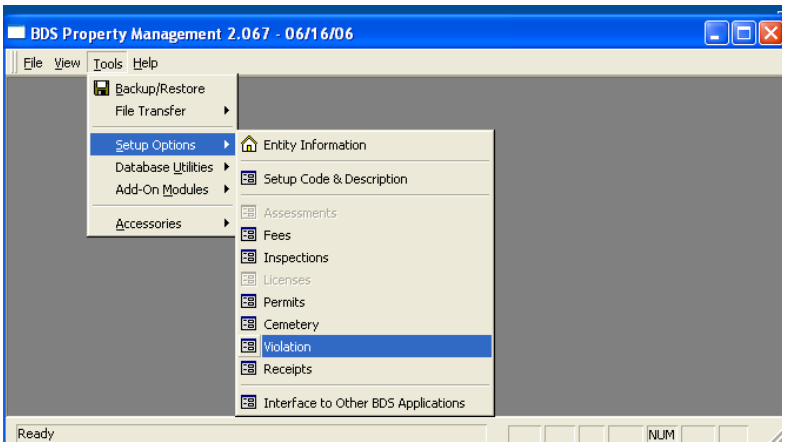


Close screen when finished.

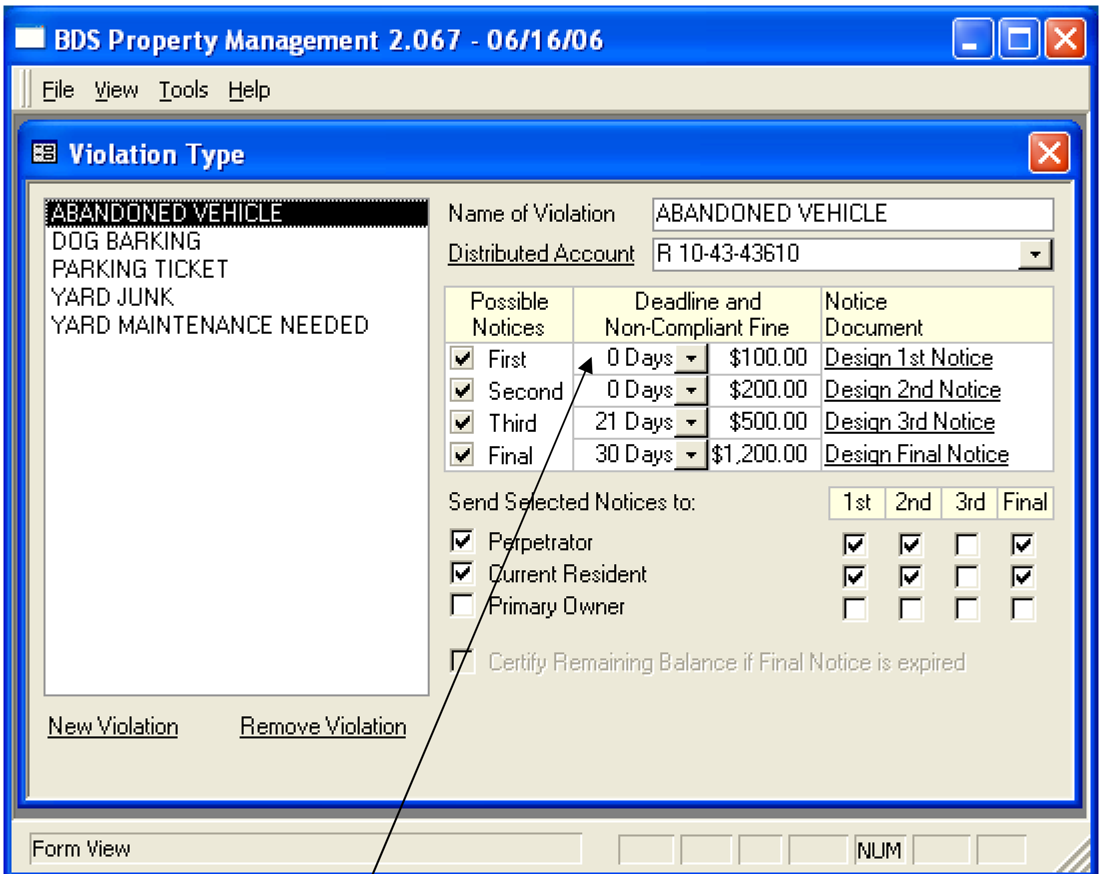
SETTING UP THE VIOLATION MODULE:

The Zoning Violation Module relies on the database entered in the Property Management system. Remember to do this first before using the module. If you have the Banyon Utility Billing program we can convert and import those addresses into Property Management system. Please call for cost estimate to convert.

Now, lets begin. First, click on Tools menu item at top and then highlight the Setup Options menu item and click on the Violations submenu item.



The Violation Type screen will appear. This is where you create new violation types/names, enter the notice schedule, fines, enter fund accounting distribution account for the fine revenue and design the notice layout and text. Then, check the box for notice recipients (Perpetrator, Current Resident, or Primary Owner) and indicate with a check mark what notice sequence each owner or customer type shown should receive.

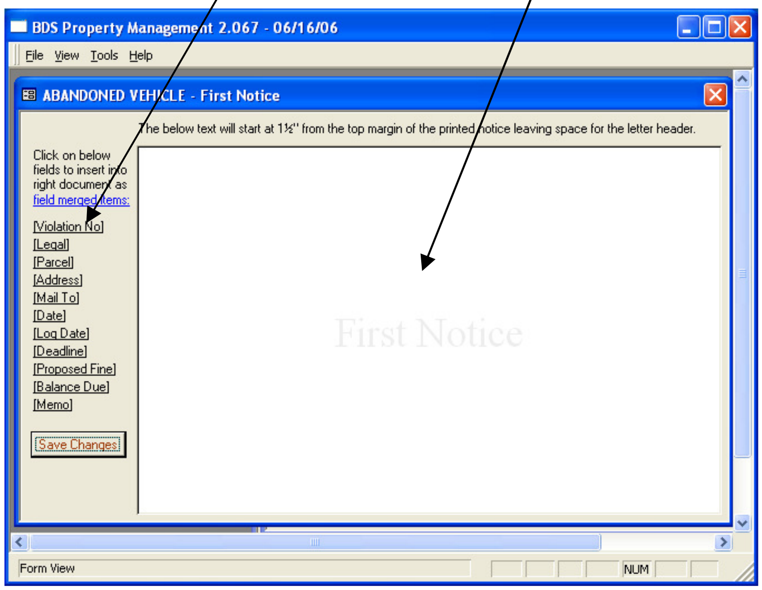


Click on the New Violation to add a violation record type. Complete the fields as needed. REMEMBER THAT A DEADLINE OF 0 DAYS WILL ATTACH THE NON-COMPLIANCE FINE TO THE CUSTOMER OR PROPERTY IMMEDIATELY. Otherwise, if days are used for deadlines, then you must run the Non-Compliance process in Periodic Processing to add new fines and notices.

Click on Remove Violation to delete the violation type.

DESIGNING NOTICES

Click on the Design 1st, 2nd, 3rd and/or Final Notice field and ceate your notification as legally allowed and approved by your organization. An open page will appear where you can enter text and insert embedded/imported fields into your notice.



Click the Save Changes button when finished. Now repeat for each notice used.

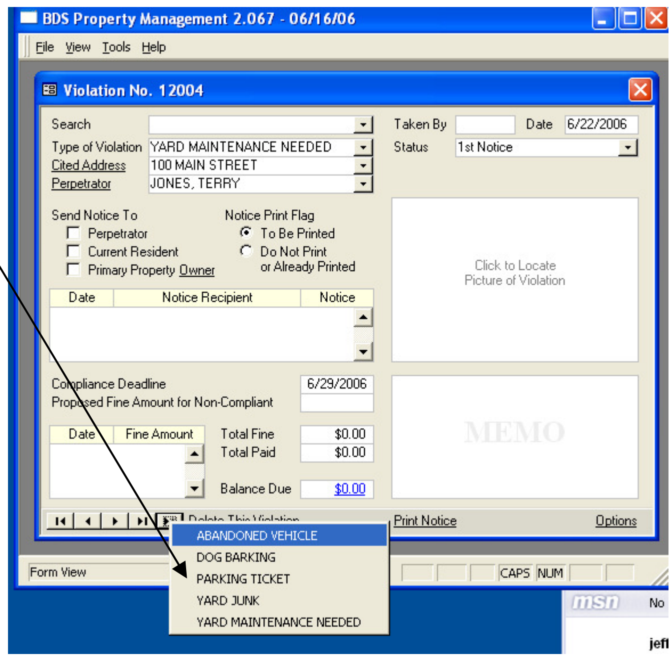
When finished, you are now ready to enter violations and attach types and notices.

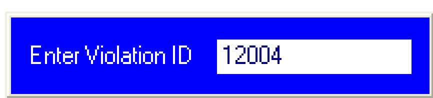
ADD A NEW VIOLATION RECORD

To access the module for the first time and add a new violation to a property or customer, **click on View** menu item, at the top right of the screen and then **highlight the Inquiry** menu item and then **click on Violation**.

Again, when first using the module, an empty violation record screen will appear and you can search for a property or customer that has been created in the Property Management Property or Customer system.

Next, click on the arrow-asterisk on the browse bar in the lower left corner and click on a violation type.



Then enter a Violation ID or number 

and press the Enter key. An empty screen will also appear if adding a new violation to an existing property or customer record that already has a violation attached.

Complete the detail information, including the insertion of a photo and/or add memo. The Status you attach will be the notice sequence number you assign. A 1st Notice will print that notice.

IMPORTANT:

IF A STATUS HAS BEEN ADDED AND HAS BEEN SETUP WITH A 0 DAYS DEADLINE FOR NON-COMPLIANCE, THE FINE, AS SETUP, WILL BE ADDED IMMEDIATELY TO THE CUSTOMER.

You can now print the notice by clicking on the Print Notice screen option.

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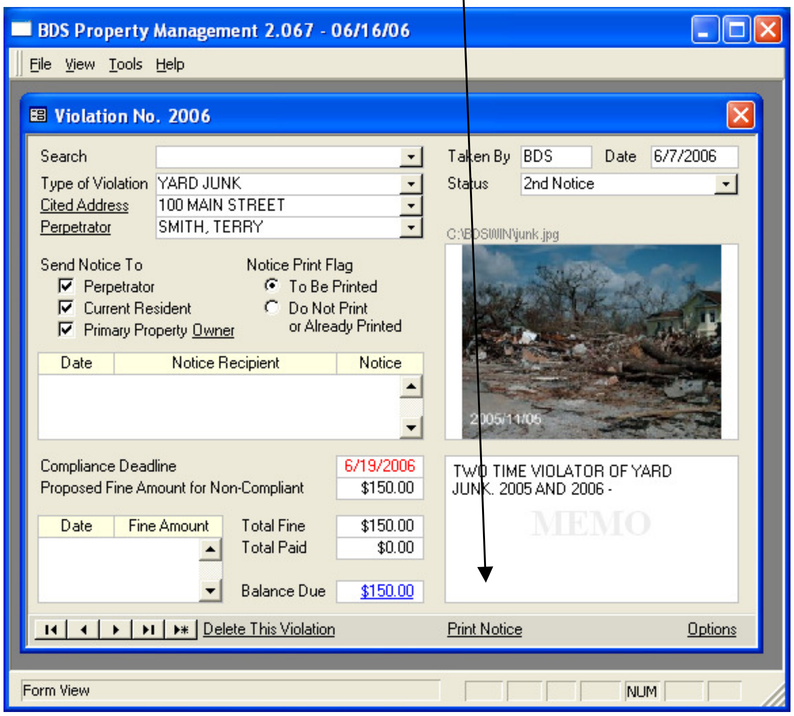
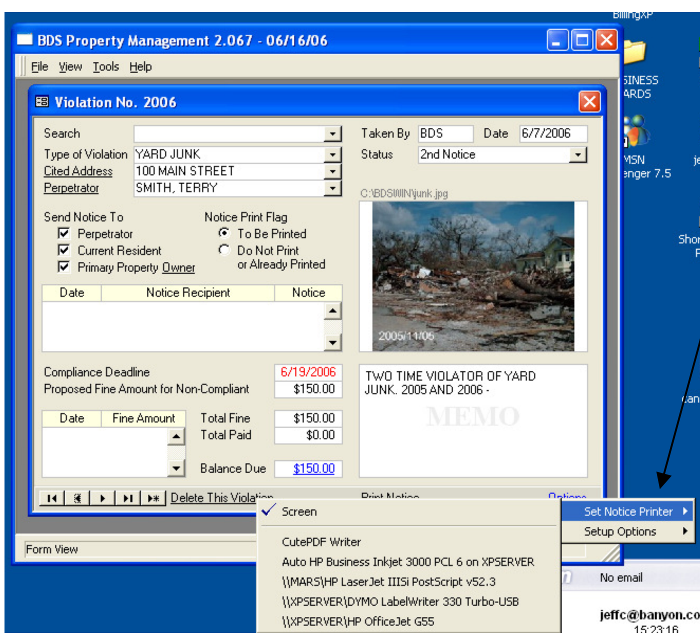
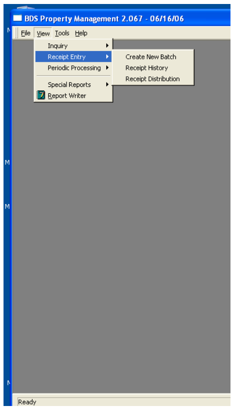


Click on Option to Set Notice Printer or Screen display or access the Violation Setup types and codes.

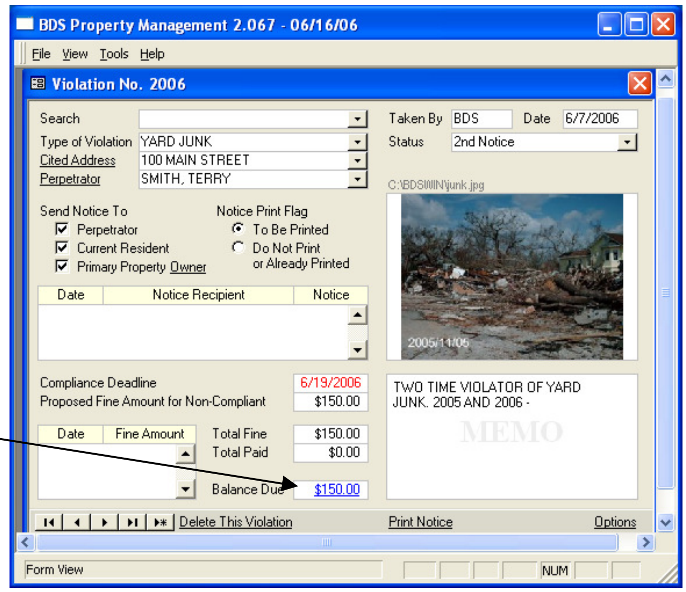


VIOLATION MODULE - PAYMENT ENTRY

Payments are entered on the Violation screen, or may be added as part of a receipt entry batch.

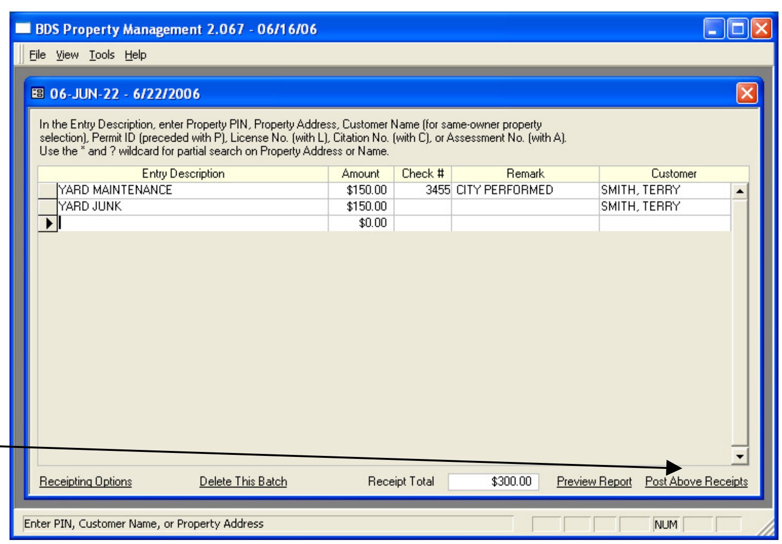


To enter as a batch on Main menu, click on View and highlight Receipt Entry and click on Create New Batch or click on an existing batch name.



To process payment directly on the Violation Screen, search and display the subject record and click on the Balance Due amount (blue text). Next create or add to an existing batch.

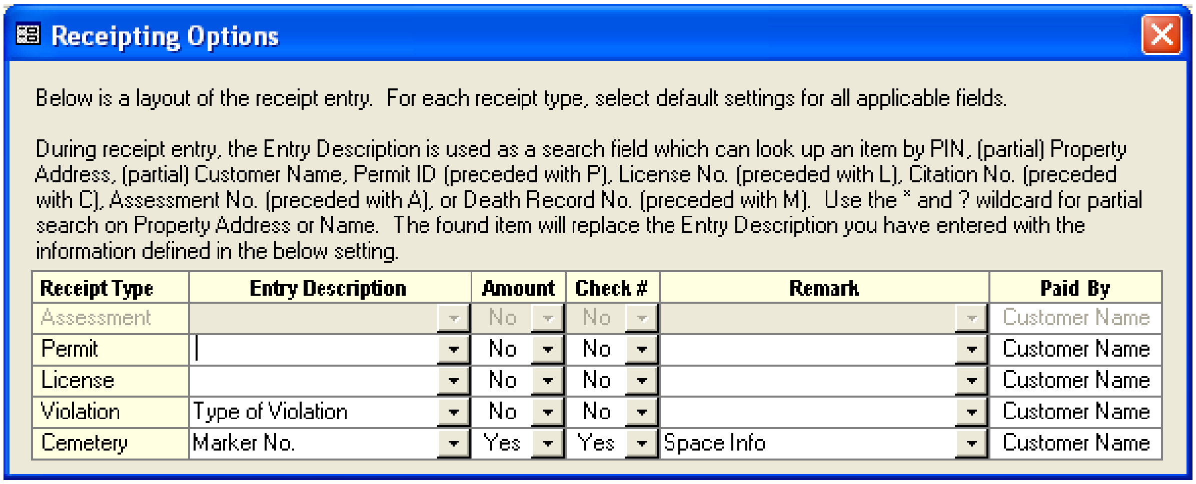
Enter a Batch name and press Enter Key.



If entering your payment through the Violation software and you have clicked on the Balance Due dollar amount field, the entry will automatically appear. If you need to add other payments enter the description (address, name PIN, violation #) and the amount will appear in the amount column.

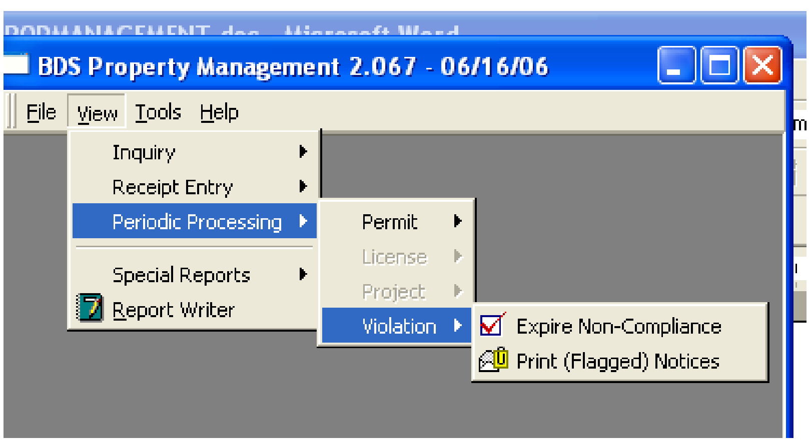
When finished you can post the receipt batch.

You can click on [Receipting Options]() and setup the description type to be used to find customer balances, option set to enter check number, and option to stop at the amount field to enter new amount or skip the amount field and always display total amount.



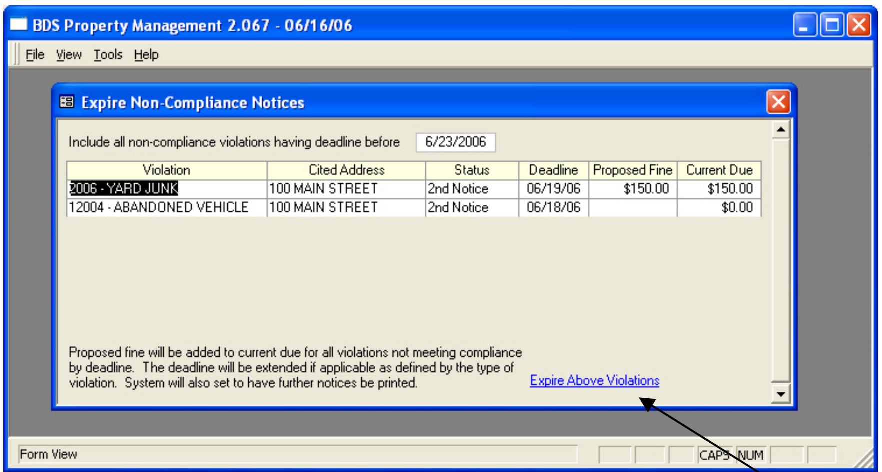
Close the Window to save the settings.

PROCESSING NON COMPLIANCE VIOLATIONS - FINES ADDED



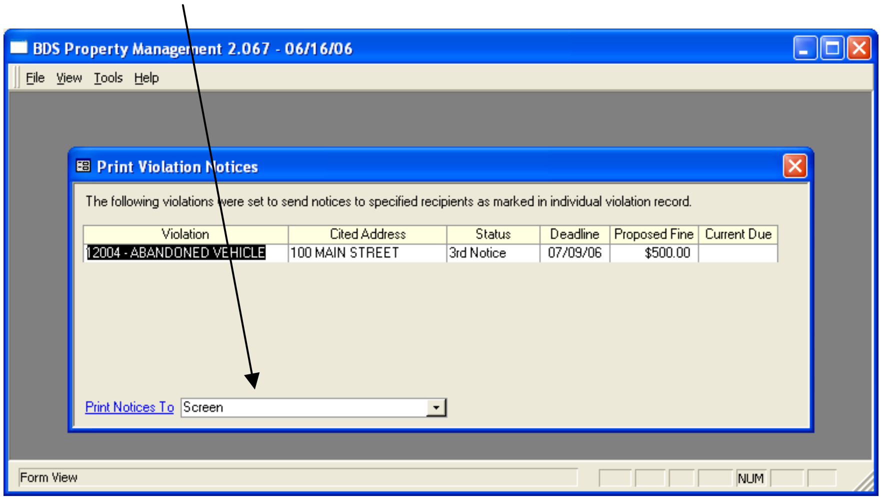
Once a day or week, whatever you decide is best you are going to have to run the Expired Non-Compliance routine. To do this, click on View on top Menu and then highlight Periodic Processing and Violation. Then click on Expired Non-Compliance. You can also print all flagged notices of this submenu.

The Expired Non-Compliance screen will appear and you can view the list of violations in your system, including the Violation type, address, status, deadline, proposed fine and current due. If the days of the proposed deadline have passed and you run the Non-compliance procedure, the status will move to the next violation level and a fine, if one has been assigned, will be added to the perpetrators record.

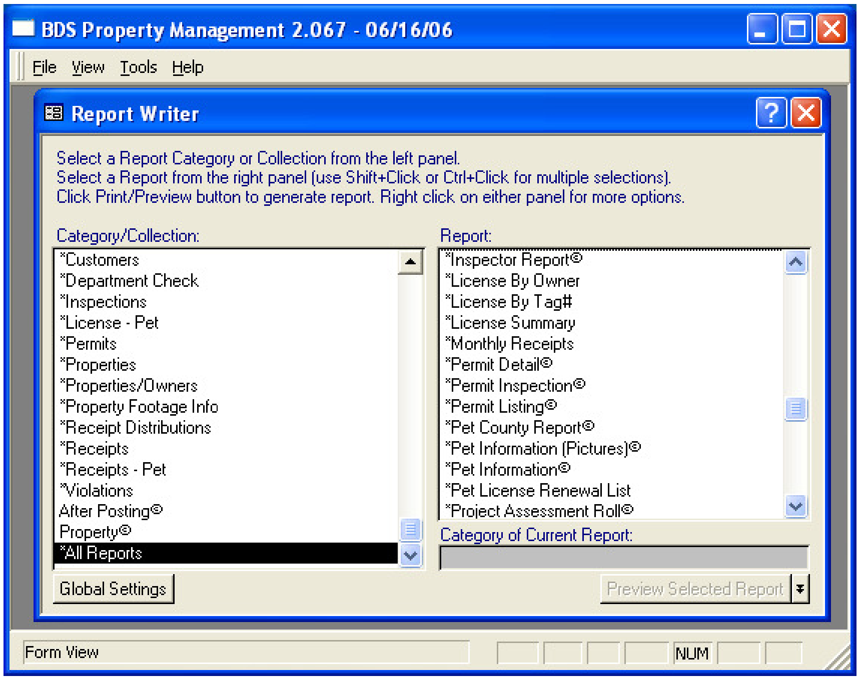


Now run the Non-Compliance routine by clicking on the Expire Above Violations.

The next screen will show the changes from the routine and the new status and fines. It is here that you can also run new notices as customized by your organization. These notices can be printed to the screen first then to a printer or directly to the printer.



PROPERTY MANAGEMENT REPORT WRITER



Click on View at the top left corner of the screen. Next, choose Report Writer. Select Permits on the left hand side.

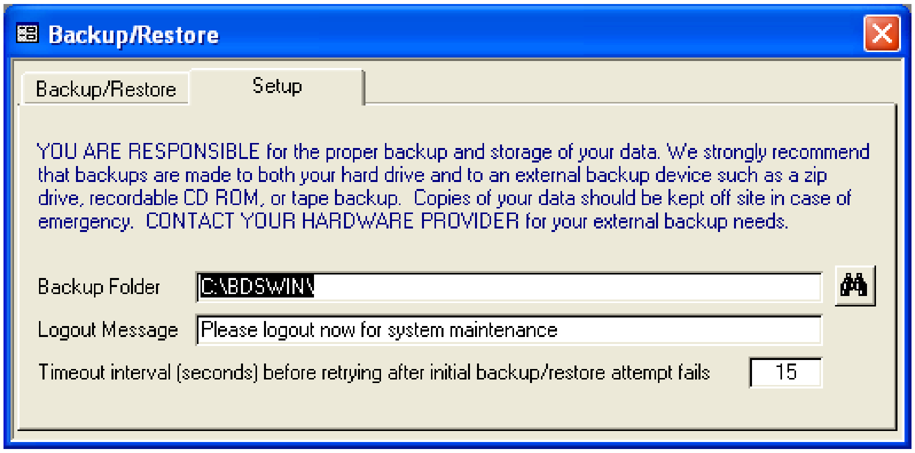
Choose the report you wish to print by selecting one from the right hand side. You can either click on Preview Selected Report or simply double click on the report you wish to print.

BACKUP AND RESTORE DATA

Backup and Restore is used the same way as with all Banyon Window programs. You may select the drive, path, and folder for the backup and define the backup with a name and date. A logout message is also available to notify others in your network of the backup procedure.

Setup Tab

Click on the Setup Tab to select your Backup Folder. This folder should be on a system that is regularly backed up on tape or CD.



Backup/Restore Tab

Click on this tab to see the backup log or listing or to create new, overwrite, locate or remove a backup of your data for the subject application. Right click on the displayed screen or Window to select your option.