

[Banyon Data Systems](#)  
**PROPERTY MANAGEMENT USERS GUIDE**  
**Permits, Business Licenses, & Violations**

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By

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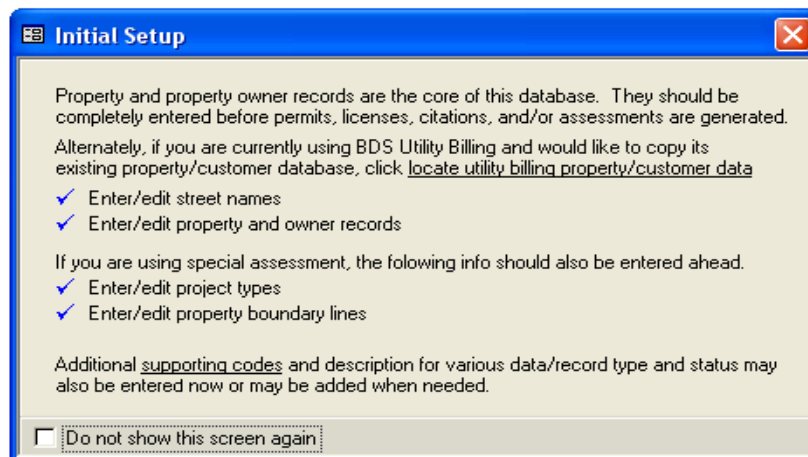
## INTRODUCTION TO PROPERTY MANAGEMENT

Banyon's Property Management Software includes Code Enforcement/Violations. Additional modules available for purchase include: Permits & Business Licenses, Special Assessments, Cemetery Records, and Pet License

This manual will cover Property Management: Permits , Business Licenses & Violations.

### PROPERTY AND CUSTOMER SETUP

Banyon can convert parcel records and other information from the following files: .csv, .xls, .mdb, or .txt. If you are a current Banyon Utility Billing customer, all accounts from utility billing can be copied into property management. To do this, click on **locate utility billing property/customer data** to browse and locate your data. Once selected, the information will be imported directly into property management. Banyon can walk you through this over the phone.



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 from view & inquiry or tools & setup options.

**Enter/edit Street Names:** This is used once you start entering properties into the database and you need to edit any street names that you have entered wrong or want to change.

**Enter/edit Property and Owner Records:** Use this to continue or start entering property or customer information into the database manually. Further description on manual entry is on page 5.

## CODE AND DESCRIPTION SETUP

Click on tools on the top left, select **Setup Options**, then select **Setup Code and Description**.

Codes & Descriptions

Select an option below and enter all applicable values in the right table

**Property**

- Street
- Property Type
- Zone
- Zone Type
- Dwelling Type
- Status
- Land Use
- Fire District
- Police District
- Flood District
- Sanitary District
- School District
- Sewer District
- Water District
- Hazardous Storage
- Warning Type
- Property Line
- Electricity Provider
- Waterhed
- External Wall
- Type of Sale

**Cemetery**

- Religion
- Relationship
- Funeral Home
- Funeral Location
- Doctor/Caregiver
- Authorized By
- Undertaker
- Interred Method
- Marker Type
- Marker Vendor
- Deed Salesperson
- Space Type
- Space Status
- Military Branch
- Military Rank
- Military Conflict
- Maintenance Type
- Maintenance By

**Permit**

- Contract Type
- Work Type
- Structure Use
- Construction Type
- Occupancy Class
- Status

**License**

- Category
- Department Check
- License Subtype
- Business Type
- Status

**Violation**

- Status

**Miscellaneous**

- Customer Type
- Customer Status
- Name Prefix
- Investigate Result
- Inspection Level
- Inspection Priority
- Inspection Status

**Assessment / Project**

- Type
- Project Status
- Assessment Status

**Street**

- 123 6TH AVE E
- 124 6TH AVE E
- 1415 ASH ST
- 1423 BROADWAY
- 318 ROOSEVELT
- 320 14TH AVE E
- 407 BROADWAY
- 413 BROADWAY
- 423 BROADWAY
- 516 WILLOW DR
- 520 WILLOW DR
- 538 WILLOW DR
- 555 30TH AVE W
- 605 CEDAR ST
- 616 HAWTHORNE
- 711 3RD AVE E
- 724 NOKOMIS ST
- OAK STREET
- PRAIRIE RD NE
- 10TH AVE E
- 10TH AVE SW
- 10TH AVE W
- 1106 N. MCKAY AVE NE
- 114 SW
- 11TH AVE E
- 11TH AVE W
- 12021 N. NOKOMIS
- Reserved code - no change/delete allowed

Setup of Codes and Descriptions is a collection of valid data items to be used in the different areas of the software.

Some fields have reserved values that can't be changed or deleted from the list. It is not necessary to enter all this information initially. When you type values in the fields throughout the software data entry process they will be added to the list. The fields will be described during that specific section of the manual.

This area will also allow you to edit any item values that are entered accidentally.

## RECEIPT SETUP OPTIONS

Receipting Options

Below is a layout of the receipt entry. For each receipt type, select default settings for all applicable fields.

During receipt entry, the Entry Description is used as a search field which can look up an item by PIN, (partial) Property Address, (partial) Customer Name, Permit ID (preceded with P), License No. (preceded with L), Citation No. (preceded with C), Assessment No. (preceded with A), or Death Record No. (preceded with M). Use the \* and ? wildcard for partial search on Property Address or Name. The found item will replace the Entry Description you have entered with the information defined in the below setting.

Receipt Type	Entry Description	Amount	Check #	Remark	Paid By
Assessment	Project ID	Yes	Yes	Property Address	Customer Name
Permit	Permit ID and Type	Yes	Yes	Property Address	Customer Name
License	License Type	Yes	Yes	Property Address	Customer Name
Violation	Type of Violation	Yes	Yes	Property Address	Customer Name
Cemetery	Death Record No.	Yes	Yes	Leave Blank for User Entry	Customer Name


To access go to tools, setup options, and then select receipts.

For each **RECEIPT TYPE** click on the drop downs to select what information will be automatically filled in on the receipt entry screen. In the **Remark** column you can select to leave blank so the user can type notes in manually.

## PROPERTY AND OWNER RECORD MANUAL ENTRY

The system does make it easier for you to enter property and owner records manually. If you were to start from the Initial Setup Screen, click on the Property and Owner hyperlink and the system will take you to the appropriate screen. You can also access the Property screen from View, Inquiry, and then Property.

It is easier to first create the property record, and then attach an owner under the owner tab. If the owner does not exist you will be able to add a new owner at that time.

To create a new property, click on the button  located on the bottom left of the screen. The system will ask for the full property address. Enter the address using the format as shown: House Number, Street Name, Street type, Direction, and then Apt/Suite Number. The system will automatically split the full address into appropriate sub-address info.

The city, state, and zip info is automatically taken from the entity screen and may be changed.

**Note: The Full Address field is not editable. If you happen to have entered the full property address incorrectly, correct the house number or street name separately. The system will reconstruct the full address accordingly.**

After entering the property address, you can proceed to setting the property status, PIN, property note, legal and zoning info.

You can now go to the Owner tab and click on attach new party(s) option on the left. If you would like to attach an existing owner, select them from the drop down. To create a new owner, click on the drop down and select create new contact.

## ATTACHING A PICTURE

To attach a picture to the property, simply click in the picture box to locate the saved file on your computer or network. It is recommended to save all pictures to the same folder and have that folder backed up separately.

The picture must be saved as a .jpg or .bmp extension.

***Doing a Banyon backup does not backup your picture files so they need to be backed up separately.***

To delete a picture simply go to the saved folder and delete the picture.  
To update, click the picture and browse for the updated one.

Property 8217 38th Ave N

Search\* 14537

House/Street 8217 38th Ave N

Apt/Desc

Print Label

Envelope New Hope MN 55427-


Owner Olson, Chris

PIN 88-9944-344 2232

Status Open

Charges \$28,668.25

Notes



## PROPERTY LOOKUP

Search\* 9981

To lookup a property record, use the search drop down menu to enter a PIN or parcel #, property address, or owner's name. To do a partial search use wildcard characters (\* and ?). For example, Johnson\* will give you a list of all properties owned by persons whose last name is Johnson. Simply click on one to view property screen.

Matched Names	Address
JOHNSON, HERBERT A & CARMEN J	1207 DONNA DR NW
JOHNSON, RICHARD C & BEVERLY	1310 LAKE CREST DRIVE
JOHNSON, LARRY J & CLAUDIA M	2414 BASSWOOD LANE
JOHNSON, PHILLIP A/ETUX	ROUTE 8 BOX 726
JOHNSON, DONALD C & JUDITH K	1011 GENEVA DRIVE
JOHNSON, DELORIS J	2510 CONIFER AVE
JOHNSON, RUSSELL D/ETAL	8093 E LK CARLOS DR NE
JOHNSON, TIMOTHY V & SHARON F	2106 IRVINE PLACE
JOHNSON, LEWIS N & JEANETTE E	1002 AGNES AVE
JOHNSON, SCOTT A & MARY D	408 NORTH PARK

## PROPERTY INQUIRY SCREEN

### Legal tab

Enter the legal description of the property along with segment, block, lot, side, boundaries, footages, and descriptions. If you are using Banyon Special Assessment Module (Purchased Separately), the assessment calculation can be based off the footage entered.

Values in the **Boundary column** of the Footage table are defined in the Property Line section of the Codes & Description Setup (upper left menu, then choose tools, setup options, codes and descriptions.) They are criteria used in the calculation of the assessment. The **Footage** is the assessable footage. **Description/Street** is the adjacent street the footage is based on.

Segment	Block	Footage Item	Footage	Description/Street
36216	8	Street Feet 1	780.0	39TH AVE NE
		Avenue Feet 1	25.0	Crescent Ave
		N-S Alley	30.0	Blacktop

201X143SWX141.75

**View Map:** Clicking on view map will enter the property address into Google Maps and display where it is located.

### Zoning tab

These fields may be used for assessment selection or for permit and/or license warnings. Reports can also be generated in report writer based on any of these fields. For example, you could get a report of all properties in a certain Zone, or Police or Fire District. Available values are pre-defined in the Codes and Descriptions Setup. The system will recognize and accept new values.

Zone	Zone Type	Property Type	Structure Type	Land Use Type	Hazardous	Watershed	Electricity	Remarks	Commercial	Agriculture	Flood Plain	Shore Land	Well	Septic System	School District	Police District	Fire District	Sanitary District	Flood District	Planning District	Water District	Sewer District	Septic Type	Current Status	Year Installed	Lake Frontage
R-1	Single Fam Residential	Residential	3-4 Family Residential	LOW DENSITY RES	PROPANE TANK		Xcel Energy				<input checked="" type="checkbox"/>				270	2	4	1	0							



## Building tab

Attach a floor plan, values of building and land, sale prices, size, year built, bedrooms, baths & more!

### Floor Plan Initial Setup

1. Click on floor plan and then choose “select common folder”
2. Choose where you would like the folder to be stored C: or network and then use



- the create folder option and give the folder a name.
3. All floor plans that are scanned in need to be save to this location.

### Attaching & viewing floor plan

1. To attach a floor plan to a property, click on **floor plan**, then click on locate document. If you previously saved the floor plan in the “common folder” it should be listed there for you to select.
2. Once attached, you can at anytime click on **floor plan**, select view and the floor plan for this property will be displayed.

Legal	Zoning	Building	Customer	Assessment	Permit	License	Violation	Property Tax	Utility Billing	Fee	Misc.
Structure Description		Structure Size		Year Built							
Floor Plan		Ground Floor		No. of Stories							
External Wall		2nd Floor & Up		Total Rooms							
Building Value		Recreation Room		Bedrooms							
Land Value		Finished Basement		Full Baths							
Last Sale Price		Open Porch		Half Baths							
Type of Sale		Enclosed Porch		Brick Fireplaces							
		Wood Deck		Other Fireplaces							
		Attached Garage									
		Detached Garage									
<div>Navigation icons: back, forward, search, etc.</div> <div><a href="#">Delete Property</a> <a href="#">Create Assessment Certificate</a> <a href="#">Report Assessment Info</a> <a href="#">Print</a> <a href="#">Options</a></div>											

The print button will show up under each tab and allows you to print a property report that will show name, address, parcel, value, & balances due for permits, licenses, etc.

## Owner tab

Shows who owns the property or is a party of interest with the property like a mortgage company. All associated owners are listed in the box.

Legal Zoning Building **Owner** Permit License Violation Utility Billing Fee Attachment Misc.

Party of Interest (Owner, Mortgagee, County)

\*Olson, Chris

Attention

Address 8217 38th Ave N  
New Hope MN 55427

Home Phone

Work Phone

Fax Number

E-Mail

☒ Primary Owner  
☐ Contract Purchaser  
☐ Fee Purchaser  
☒ Notice Recipient  
☒ Bill Recipient

[Attach New Party\(s\)](#) [Detach Selected Party](#) [Previous Owner\(s\)](#) [More Information](#)

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 Owner screen (view, inquiry, and owner.) You can, however, check the option boxes for each listed owner. To change primary ownership to a different owner, first select that owner then check Primary Owner.

- ☒ Primary Owner
- ☐ Contract Purchaser
- ☒ Fee Purchaser
- ☒ Assessment Notice Recipient
- ☒ Assessment Bill Recipient

To remove an owner from a property, highlight the owner and then click **detach selected party**. You can then attach a new owner by clicking on the attach new party option. To view previous owners, click on the **previous owners option**.

The **More information** option will bring you to the owner's record where you can look at all the properties they own, view all permits and licenses as well.

[Attach New Party\(s\)](#) [Detach Selected Party](#) [Previous Owner\(s\)](#) [More Information](#)

## Assessment, Permit, License, Property Tax, & Violation tabs

These are add on modules and will show only if they were purchased. It provides easy access to look at all permits, licenses, assessments, or violations for the property.

To view a specific permit for example, click on it and select specific to view that permit detail. You can also create or attach a new permit, license, etc for the property from these tabs.

Legal Zoning Building Owner **Assessment** **Permit** License Violation Utility Billing Fee Attachment Misc.

Permit	Status	Issued	Balance
▶ No. B-11002 Basement Finish	Issued	08/10/11	\$1,350.00
No. 91339 Electrical Permit	Pending		\$0.00
No. 91340 Electrical Permit	Issued	06/29/11	\$56.00
No. 91341 Electrical Permit	Pending		\$61.00
No. 91342 Electrical Permit	Pending		\$0.00
No. B-11004 Basement Finish	Pending		\$1,350.00
No. 91343 Plumbing Permit	Pending		\$0.00
No. B-11005 Basement Finish	Pending		\$1,350.00
No. 91344 Mechanical Permit	Pending		\$0.00
No. 91345 Plumbing Permit	Pending		\$0.00

Permit No. B-11002

Apply Date

Issue Date 08/10/11

Start Date

Last Inspected

Project Begin

Project Complete

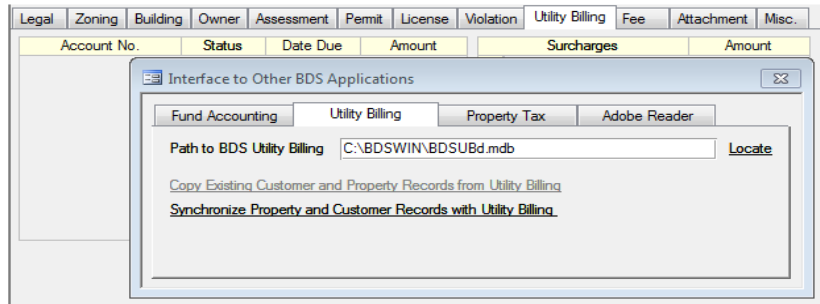
Expire Date 08/10/12

[More Info](#) [New Permit](#)

## Utility Billing tab

If you have Banyon Utility Billing and have the path linked, this will display the utility billing account number and what the account currently owes.

To set the Utility Billing link click on tools, setup options, then link to other bds applications. Click on the Utility Billing tab and browse to the location to select the file bdsbnd.mdb



## Fee tab

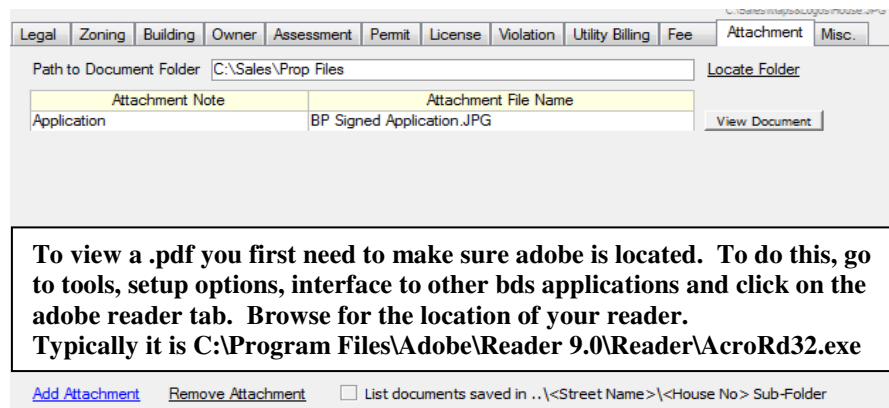
Attach miscellaneous fees to the property. Fees can be set up under tools, setup options, and fees. Adding fees are talked about more in the permit and license section of the manual.

## Attachment tab

Attach any .pdf or .jpg that is applicable to this property.

First a common folder needs to be located by clicking locate folder. All documents need to be saved in that folder. The same folder is used to store all documents related to your properties.

To add an attachment, click on the **Add attachment** option on the bottom left and browse to your common folder. Once the attachment is linked you can add a note for it. To view the document , simply click on view document.



## Misc. tab

Enter assessed value or use the user defined fields to track information about the property. For the user define fields you can change the heading by clicking on it and renaming the field. The renamed field will be used on all properties.

Remember that reports can also be created in report writer and filtered based on the user defined fields. Give us a call if you need help creating one.

Previous pin would be used if the parcel splits and it has a new pin or parcel #.

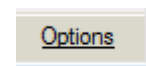
## CREATING NEW DEVELOPMENT

To add a new development you can click on the [Options](#) button in the bottom right of the property screen. Then select “add multiple properties” and the below screen will appear.

Next, fill in the information on the left side of the screen and then proceed to the right side starting with owner or developer and street name. Next, indicate how many lots or parcels there will be (ex 1-10) and then press enter. You will be asked if you want to create the accounts. Lastly, fill in the pin or parcel numbers and house numbers and then click on create records.

## SPLITTING A CURRENT PARCEL

In some cases a parcel might be split into 2 parcels. To do this, pull up the current parcel and then click on the options button in the bottom right.



Next choose split current parcel and the below screen will appear.

In the lots field, enter how many new parcels there will be. If it is splitting, simply enter a 1 and press enter. Then give the split a parcel number and click create records.

## OWNER INQUIRY SCREEN

To access the owner information screen click on view, inquiry, and then owner information.

To lookup a record, use the search drop down menu to enter a PIN or parcel #, property address, or owner's name. To do a partial search use wildcard characters (\* and ?). For example, Johnson\* will give you a list of all properties owned by persons whose last name is Johnson.

Matched Names	Address
JOHNSON, HERBERT A & CARMEN J	1207 DONNA DR NW
JOHNSON, RICHARD C & BEVERLY	1310 LAKE CREST DRIVE
JOHNSON, LARRY J & CLAUDIA M	2414 BASSWOOD LANE
JOHNSON, PHILLIP A/ETUX	ROUTE 8 BOX 726
JOHNSON, DONALD C & JUDITH K	1011 GENEVA DRIVE
JOHNSON, DELORIS J	2510 CONIFER AVE
JOHNSON, RUSSELL D/ETAL	8093 ELK CARLOS DR NE
JOHNSON, TIMOTHY V & SHARON F	2106 IRVINE PLACE
JOHNSON, LEWIS N & JEANETTE E	1002 AGNES AVE
JOHNSON, SCOTT A & MARY D	408 NORTH PARK

**Name Change:** To change the name of an owner click on the NAME that appears to the left of the owners name field.

**Print Label:** To print a label for this owner click on Print Label and the label screen will pop up.

No. of labels to print: 1

Click on the label (on right) to start at to begin printing labels.

Labels will be sent to: Screen

Labels: ☒ 3-up ☐ 4-up

Next click on any spot on the label sheet to print and it will only print on that label spot. The default labels to print on are 3 up with dimensions 1" by 2 5/8".

**Print Envelope:** This option will simply print the name/address directly on an envelope. Click this option, and then click print (insert envelope in printer)

## Personal Tab

Shows optional information about the owner like drivers license #, social security #, birth date, height, weight, race, etc.

Personal Property Permit License Contractor Assessment Violation Utility Billing

Title  
First Name Chris  
Last Name Olson  
Drivers Lic #  
Soc Sec #  
Birth Date

Weight  
Height  
Eye Color  
Hair Color

Ethnicity  
Race  
Sex

MEMO

Navigation buttons: First, Previous, Next, Last, Refresh, Delete Customer

## Property Tab

Shows all properties that the owner owns. To view a specific property, click on it and then choose more property info.

Personal Property Permit License Contractor Assessment Violation Utility Billing

Owned Properties  
88-9944-344 2232 8217 38th Ave N  
8219 38th Ave N

Other Party of Interest on Selected Property

Attach New Property Remove Selected Property More Property Info

Navigation buttons: First, Previous, Next, Last, Refresh, Delete Customer

## Assessment, Permit, License, & Violation tabs

These are add on modules and will show only if they were purchased. It provides easy access to look at all permits, licenses, assessments, or violations for the owner on all properties they own.

To view a specific permit for example, click on it and choose specific to view detailed information. You can also create or attach a new permit, license, etc for the owner from these tabs.

Legal Zoning Building Owner Assessment Permit License Violation Utility Billing Fee Attachment Misc.

Permit	Status	Issued	Balance
No. B-11002 Basement Finish	Issued	08/10/11	\$1,350.00
No. 91339 Electrical Permit	Pending		\$0.00
No. 91340 Electrical Permit	Issued	06/29/11	\$56.00
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No. 91342 Electrical Permit	Pending		\$0.00
No. B-11004 Basement Finish	Pending		\$1,350.00
No. 91343 Plumbing Permit	Pending		\$0.00
No. B-11005 Basement Finish	Pending		\$1,350.00
No. 91344 Mechanical Permit	Pending		\$0.00
No. 91345 Plumbing Permit	Pending		\$0.00

Permit No. B-11002  
Apply Date  
Issue Date 08/10/11  
Start Date  
Last Inspected  
Project Begin  
Project Complete  
Expire Date 08/10/12

More Info New Permit

## Contractor Tab

If the customer is also a contractor, their contractor information will show on this tab. This information is for viewing only. If changes need to be made, click on **more info** on the bottom and select CONTACT to view the contractor screen.

Contractors can also be accessed from view, inquiry, and contractors.

***\*Contractor setup is talked about on the following page.***

The screenshot shows a software interface with a tabbed menu at the top: Personal, Property, Permit, License, Contractor (selected), Assessment, Violation, and Utility Billing. The Contractor tab contains a table with columns Name, Type, and Expire. One entry is visible: Olson Construction, General Contracto, 02/01/13. To the right of the table are input fields for Tax ID, State License No (123456789), Business License No, Insurance (State Farm), Phone, Vehicle Expires, Workers Comp Expires, Bond Expires, and Liability Expires. A More Info link is at the bottom right. At the very bottom of the window are navigation buttons and a Delete Customer link.

## Utility Billing tab

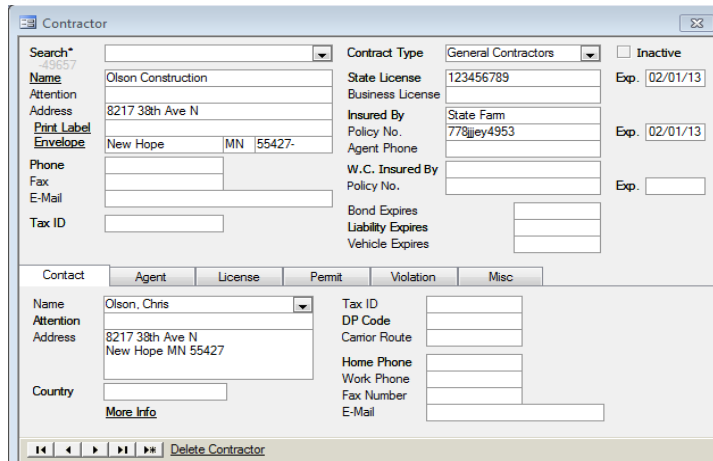
If you have Banyon Utility Billing and have the path linked this will display the utility billing account number and what the account currently owes.

To set the Utility Billing link click on tools, setup options, then link to other bds applications. Click on the Utility Billing tab and browse to the location to select bdsbd.mdb.

The screenshot shows the Utility Billing tab selected in the main application window. The background window has tabs: Legal, Zoning, Building, Owner, Assessment, Permit, License, Violation, Utility Billing (selected), Fee, Attachment, and Misc.. It contains tables for Account No., Status, Date Due, Amount, and Surcharges. An 'Interface to Other BDS Applications' dialog box is open in the foreground. This dialog has tabs: Fund Accounting, Utility Billing (selected), Property Tax, and Adobe Reader. It contains two input fields: 'Path to BDS Fund Accounting' with the value 'C:\BDSWIN\BDSFUNDd.mdb' and a 'Locate' button, and 'Default Cash Account' with a dropdown menu showing 'Valley Bank'. The main application window has navigation buttons and links like Delete Property, Create Assessment Certificate, Report Assessment Info, Print, and Options at the bottom.

## CONTRACTOR INQUIRY SCREEN

The contractor screen can be accessed from view, inquiry, and selecting contractors. It can also be accessed directly from the permit inquiry screen and the owner inquiry screen.

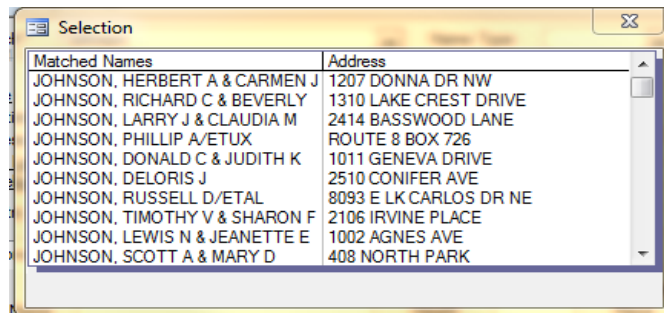


The Contractor Inquiry Screen is a web-based form for viewing contractor details. It features a search bar at the top left with a dropdown arrow. Below the search bar, there are several tabs: Contact, Agent, License, Permit, Violation, and Misc. The main content area is divided into two columns. The left column contains fields for Name, Attention, Address, Phone, Fax, E-Mail, and Tax ID. The right column contains fields for Contract Type, State License, Business License, Insured By, Policy No., Agent Phone, W.C. Insured By, Policy No., Bond Expires, Liability Expires, and Vehicle Expires. There are also checkboxes for Inactive and Exp. (Expiration Date). At the bottom, there are navigation buttons: a left arrow, a right arrow, and a button labeled 'Delete Contractor'.


To lookup a contractor, use search drop down menu to enter a contractor id, name, owner name, state license #, or tax id. To do a partial search use wildcard characters (\* and ?). For example, Johnson\* will give you a list of all contractors with Johnson in their name.

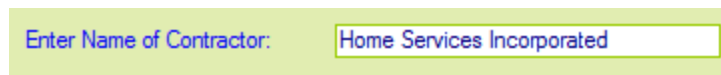


A search bar with the label 'Search\*' and a dropdown arrow. Below the search bar, the number '9981' is displayed.



Matched Names	Address
JOHNSON, HERBERT A & CARMEN J	1207 DONNA DR NW
JOHNSON, RICHARD C & BEVERLY	1310 LAKE CREST DRIVE
JOHNSON, LARRY J & CLAUDIA M	2414 BASSWOOD LANE
JOHNSON, PHILLIP A/ETUX	ROUTE 8 BOX 726
JOHNSON, DONALD C & JUDITH K	1011 GENEVA DRIVE
JOHNSON, DELORIS J	2510 CONIFER AVE
JOHNSON, RUSSELL D/ETAL	8093 E LK CARLOS DR NE
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JOHNSON, LEWIS N & JEANETTE E	1002 AGNES AVE
JOHNSON, SCOTT A & MARY D	408 NORTH PARK

To add a new contractor simply click on the  button on the bottom left and enter contractor name.



Enter Name of Contractor:



Next, fill in all relevant information for the contractor.

The screenshot shows a window titled "Contractor" with a search bar and a list of fields for contractor information. The fields are organized into two main columns. The left column includes fields for Name, Attention, Address, Phone, Fax, E-Mail, and Tax ID. The right column includes fields for Contract Type, State License, Business License, Insured By, Policy No., Agent Phone, W.C. Insured By, Policy No., Bond Expires, Liability Expires, and Vehicle Expires. There are also checkboxes for "Inactive" and "Print Label". The "Print Label" checkbox is checked. The "Contract Type" is set to "General Contractors". The "State License" is "123456789" and the "Exp." is "02/01/13". The "Business License" is empty. The "Insured By" is "State Farm" and the "Policy No." is "778jje4953" with an "Exp." of "02/01/13". The "Agent Phone" is empty. The "W.C. Insured By" is empty and the "Policy No." is empty with an "Exp." of empty. The "Bond Expires", "Liability Expires", and "Vehicle Expires" are all empty.

The software will store license and insurance information and when you create a license or a permit you can select the contractor and it will pull in all the contractor information.

A report can be created in report writer to show all contractors with expired insurance or expired licenses

**Contractor Type:** Choose from the drop down or enter a new type and it will be saved to the list.

**Name Change:** To change the name of an existing contractor click on the NAME that appears to the left of the contractor name field.

**Print Label:** To print a label for this contractor click on **Print Label** and the label screen will pop up.

The screenshot shows a dialog box titled "Print Mailing Labels". It has a "No. of labels to print" field set to "1". Below this is a instruction: "Click on the label (on right) to start at to begin printing labels." There is a section "Labels will be sent to:" with a radio button selected for "Screen". On the right side, there is a grid of 30 numbered boxes (1-30) arranged in 10 rows and 3 columns. At the bottom left, there is a section "Labels" with radio buttons for "3up" (selected) and "4up".

Next click on any spot on the label sheet to print and it will only print on that label spot. The default labels to print on are 3 up 1" by 2 5/8".

**Print Envelope:** This option will simply print the name/address directly on an envelope. Click this option, and then click print (insert envelope in printer)

## Contact tab

If the contractor is also a property owner, then this allows you to link the owner and contractor together. When you go to the owner inquiry screen and click on the contractor tab, it will show all the contractor information.

The screenshot shows the 'Contact' tab of a contractor's profile. The form includes the following fields:

- Name:** Olson, Chris (dropdown menu)
- Attention:** (empty field)
- Address:** 8217 38th Ave N, New Hope MN 55427
- Country:** (empty field)
- Tax ID:** (empty field)
- DP Code:** (empty field)
- Camior Route:** (empty field)
- Home Phone:** (empty field)
- Work Phone:** (empty field)
- Fax Number:** (empty field)
- E-Mail:** (empty field)

At the bottom, there is a 'More Info' link and a 'Delete Contractor' button.

## Agent tab

The screenshot shows the 'Agent' tab of a contractor's profile. It displays a table with the following columns:

Signing Agent	Position	Phone	Birthdate	Driver License No.

At the bottom, there is a 'Delete Contractor' button.

Used to track other employees the contractor wants listed as contacts. Can also be used to track any notary needed for licenses or insurance.

## License, Permit, Violation tab (only show if purchased)

The screenshot shows the 'Permit' tab of a contractor's profile. It displays a table with the following columns:

Permit	Status	Issued	Balance
No. 91305 Burning Permit	Approved	09/13/05	\$0.00
No. 91306 Demolition Permit	Pending		\$0.00
No. 91308 Demolition Permit	Approved		\$0.00
No. 91310 Sign Permit	Approved		\$0.00
No. 91311 Burning Permit	Approved		\$25.00

On the right side, there is a 'Permit No.' field with the value 91305 and a list of dates:

- Apply Date: 09/13/05
- Issue Date: 09/13/05
- Start Date: 09/25/05
- Last Inspected: (empty field)
- Project Begin: 09/25/05
- Project Complete: 09/26/05
- Expire Date: 09/26/05

At the bottom, there is a 'Delete Contractor' button.

Shows all licenses, permits, and violations for this contractor. To view a specific permit for example, click on it and choose specific and it will open up that permit number for more detail.

Licenses, permits, and violations can also be attached from the contractor screen.

## Misc tab

Open comment/description area to enter notes on the contractor.

## FEE/RATE SETUP

To add or view existing fees click on Tools, select Setup Options, and Fees.

This fee setup is usually for permits, licenses, or a misc. fee that you would want to attach to a property, owner, or contractor.

***\*if you want to set up violations/code enforcement information that is on page 53 of this manual.***

All fees that you want available to be charged on a permit or license must be created here. Some sample fees are included with the software, but you can customize those to your needs or create new fees. Later, the fees will be attached to the permit and license types that are created. Then when you attach a license or permit to a property or customer the correct fees will be attached based on your setup selection.

***If the fee depends on an itemized list of what is being installed, then a special setup can be done. The special setup might be common for an electrical, plumbing, or mechanical permit and is talked about on page 28.***

## ADD A NEW FEE TYPE

On the bottom left hand corner click on **Add New Fee** and enter a fee name

Now you will notice that the fee name you have just entered is added to the list of existing fees and you can now setup information for this fee.

## FEE/RATE SETUP CONTINUED

**Type of Use:** This tells how the fee can be used. There are 5 ways it can be used:

- 1) Permanent (Always Charged & defaulted to highlighted fee)
- 2) First Time (Charge only when permit is issued)
- 3) Renewal (Charged only when permit is renewed)
- 4) Pick from list when issued- a random fee that needs to be highlighted when a permit or license is created.
- 5) Pet License use only- reserved only for pet license fees

**Type of Fee:** There are four valid fee types.

License Fee  
Permit Fee  
Universal Fee (Can be charged on both permits and licenses)  
Escrow

**Base Charge :** Flat fee to be charged

**Times Units:** Base Charge is multiplied by the number of units field on the permit.

**Distributed Acct:** If you have Banyon Fund Accounting and it is linked together, click the drop down to select the revenue code. If it is not linked, click on **Distributed Acct** heading to set the path.

If you do not have Banyon Fund Accounting, simply enter your revenue account code. When receipts are processed, you will receive a receipt distribution report summary by account code. That report can be used to enter revenue into your accounting software.

**Report Grouping:** Used to group fees together for reporting purposes (optional)  
Ex) get a report total for all surcharges or plan check fees.

## Add Itemized Fees

This feature is used for a license where you want to use the larger fee based on square footage and business dollar volume.

Fee

Basement Finish  
Building Permit  
BURNING PERMIT  
Bus License  
**Business License**  
Deck Permit  
DECK PERMIT FEE

Description: Business License  
Type of Use: Permanent (Always Charged)  
Type of Fee: License  
Base Charge: \$100.00  
Unit Charge: \$0.00  
☒ Add Itemized Fees  
☐ Times Units

After the fee is created make sure a license is then created under tools, setup options, licenses and set the type to BUSINESS and then attach the fee created.

When a license is attached to a customer or property, at the bottom there is a spot to enter square footage and business dollar volume on the "Specific Tab". The license cost will be calculated for each scenario and since the box is checked to apply the larger of the two, that will be the cost of the license.

Specific

		% of Valuation	Valuation
Square Footage	3200	0.1000	\$3.20
Business Dollar Volume	\$500,000	0.0012	\$6.25

☒ Use only larger valuation as fee

## Penalty tab

**Exempt From Penalty:** Check this box if fee is always exempt from receiving penalty charges.

**Penalty Base:** Enter penalty dollar amount

**Penalty Rate:** Enter penalty %

**Interest Rate:** If interest is also charged, enter it here.

**Penalize Minimum:** If this fee owes less than this minimum, no penalty will be applied. Ex. Put \$10 in minimum and no penalty will be applied to accounts owing less than \$10.

**Penalty Limit:** If a calculated penalty is more than this amount, then the penalty is reduced to this amount.

**Distributed Account:** Click on this to choose the BDS Fund Accounting Account Code that this charge would be applied to. If not using Banyon Fund Accounting, simply type an account code in the box.

Penalty Tier Plan Check Misc.

☐ Exempt From Penalty

Penalty Base: \$0.00  
Penalty Rate: 0.000  
Interest Rate: 0.000  
Penalize Minimum: \$0.00  
Penalty Limit: \$0.00

Distributed Account: [Dropdown]

## Tier tab

Penalty Tier Plan Check Misc.

Tier Is Based On ☒ Units ☐ Estimated Cost of Work

	Tier	Example	Amount	Per	Rate
	First	1,000.00	\$2.00	100	0.0000
	Next	4,000.00	\$0.50	200	0.0000
	Next	1,000,000.00	\$0.60	500	0.0000
*			\$0.00	0	0.0000

Enter a test unit/cost to compute a sample fee

**Tier is Based On Units:** This line sets up a basis for the tiers shown above.

\$2 for every \$100 of the first \$1000

\$.50 for every additional \$200 past \$1000

\$.60 for every additional \$500 past \$5000

**Tier is computed as Amount X Per +Rate/100XTier Value and accumulatively as the sum of all tiers.**

**Estimated Cost of Work:** The tier is based on the Estimated Cost of Work for this permit fee.

Penalty Tier Plan Check Misc.

Tier Is Based On ☐ Units ☒ Estimated Cost of Work

	Tier	Example	Amount	Per	Rate
►	First	10,000.00	\$500.00	0	0.0000
	Next	20,000.00	\$600.00	0	0.0000
*			\$0.00	0	0.0000

Enter a test unit/cost to compute a sample fee

On this example, when the valuation is entered on the actual permit screen the fee would be charged according to this tier. For example, the estimated cost of work is \$20,000 the permit fee would be \$1,100

***To test the tier setup, simply enter in an estimated cost of work and your fee will be calculated.***

## Tiers Explained Further

Each tier line has four things in common.

### Column 1      Units/Amounts

This column determines the range of the line. The line is charged for just the units/amount listed in this column before the fee calculation goes on to the next line.

### Column 2      Amount to charge for each Per

This is the dollar amount to charge for each Per until the Units/Amount column for this line has been reached.

### Column 3      Per

The Per divides up column 1 (Units/Amounts) into chunks. Each chunk can be charged a dollar amount (column 2) and/or percentage (column 4).

### Column 4      Percent

This is the percentage to charge for each Per until the Units/Amount column for this line has been reached.

For Example:	Amount	Per	Percent
--------------	--------	-----	---------

First	1000.00	25.00	100	7.500000
-------	---------	-------	-----	----------

In this example line:

Column 1 = 1000.00

Column 2 = 25.00

Column 3 = 100

Column 4 = 7.5%

This means that for the first 1000 dollars, 25 dollars will be charged for each 100 dollars. Since there are 10 chunks of 100 in 1000 dollars ( $10 * 100 = 1000$ ), 250 dollars ( $10 * 25 = 250$ ) will be charged for this line if the estimated cost of the license is at least 1000 dollars. If the estimated cost of the license is 350 dollars then 100 dollars will be charged on this line. ( $4 * 25 = 100$ ) All fractions are rounded up. In addition, 7.5 percent of the first 1000 dollars of the estimated cost will be charged for this line. Each line of the tier is processed until the units or amount runs out. The totals for each line are added up and put into the total fee amount for this fee.

**First** This line tells what to charge for the First number (column 1) units/dollars.

**Next** There are six "Next" lines. Each one is calculated in turn until the Units/Amount runs out.

**Over** This last line processes any remaining Units/Amount once the "First" and all "Next" lines are processed.

## Plan Check tab

The screenshot shows a software window with four tabs: Penalty, Tier, Plan Check, and Misc. The Plan Check tab is active. It contains three input fields: 'Residential Plan Check Rate' with a value of 0.0000, 'Commercial Plan Check Rate' with a value of 0.0000, and 'Minimum to Apply Plan Check' with a value of \$0.00.

**Residential Plan Check Rate:** This is a percentage of the permit fee amount to charge for a plan residential check fee. This is normally only charged on a building permit.

**Commercial Plan Check Rate:** Percentage of the permit fee amount to charge for a commercial plan check fee. This is normally only charged on a building permit.

**Minimum to Apply Plan Check:** The amount of the fee must be at least this dollar amount for the plan check fee to be applied.

## Misc. tab

The screenshot shows the same software window with the Misc. tab active. It contains a checkbox labeled 'Use This Fee as a Tax to Other Fee(s)' which is unchecked. Below this are several input fields: 'Associated Tax Fee' (a dropdown menu), 'Based on Another Fee' (a dropdown menu), 'Percent of Base Fee' (0.00000), 'Percent of Valuation' (0.00000), 'Charge Minimum' (\$0.00), and 'Charge Limit' (\$0.00).

**Use this fee as a Tax to Other Fee(s):** This identifies this fee as a Surcharge or Tax fee. This fee is then only calculated when another fee attached to the license identifies this fee as its tax. This fee can be used as a tax by several other fees.

**Associated Tax Fee:** Use drop down to select fee you will use as a tax/surcharge. Only those fees created as a tax fee will appear in this drop down menu. **NOTE:** You cannot tax a tax fee.

**Based on Another Fee :** Select a fee on which this fee will based upon.

**Percent of Base Fee :** Enter a % if you want the fee to be a percent of the base charge.

**Percent of Valuation:** Takes a % of the Current Assessed Value of the property. To assign a current assessed value to a property, go to view, inquiry, and select property. Look up the property by address and then select the misc tab. to enter the value.

**Charge Minimum:** This is the minimum that would be charged based on the % of valuation.

**Charge Limit:** This is the maximum a customer would be charged based on the % of valuation.



## SETTING UP INSPECTIONS

To setup inspections select tools, setup options, inspections.

### Priority/Status tab

This is where you are going to set the standards for each inspection. Difficulty level is used to determine how difficult a job will be based on the inspector qualifications. The priority column is the different levels of priority you can choose for a job. The status is the different options you want available to mark the inspection.

The screenshot shows the 'Priority/Status' tab with three main sections: 'Difficulty Level', 'Priority', and 'Status'. Each section contains a list of options and a 'Reserved code - no change/delete' button at the bottom.

Difficulty Level	Priority	Status
<ul style="list-style-type: none"><li>Level One</li><li>Level Two</li><li>Level Three</li><li>Level Four</li><li>Level Five</li><li>Level Six</li></ul>	<ul style="list-style-type: none"><li>Top Priority</li><li>Priority 2</li><li>Priority 3</li><li>Priority 4</li><li>Priority 5</li><li>Priority 6</li></ul>	<ul style="list-style-type: none"><li>Pending</li><li>Scheduled for Inspection</li><li>Failed Inspection</li><li>Scheduled for Re-inspection</li><li>Passed Inspection - Closed</li></ul>
Reserved code - no change/delete	Reserved code - no change/delete	Reserved code - no change/delete

### Type of Inspection Tab

The first column is where you will name your inspection. Next, you will set up the Difficulty Level, Priority and the duration of time, which will be spent completing each inspection. The **note** is there for any additional information you may have pertaining to the individual inspections. This will also carry over to the permits when you have scheduled inspections on those.

Each inspection type can also have different **INSPECTION RESULTS** created. To do this, simply click on an inspection type and then create the results you want available.

The screenshot shows the 'Type of Inspection' tab with a table of inspection types and their settings. Below the table is a section for 'Inspection Result' with a list of results and checkboxes for various actions.

Inspection Type	Difficulty	Priority	Duration	Default	Prerequisite
Building Inspections	Level Three	Top Pri	30 min	Yes	
Electrical Inspection	Level Two	Priority	30 min	Yes	
Plumbing Inspection	Level Three	Priority	30 min	Yes	
*				No	

**Inspection Result**

- Passed
- Failed
- Re-Schedule

☐ Set Permit Status to Closed upon passing inspection

☒ Set Last Activity to inspection date upon passing inspection

☐ Set Project Ending to inspection date upon passing inspection

☐ Automatically schedule same inspection on next anniversary date

Prerequisite column allows you to assign an inspection that needs to be completed first before another inspection can be done.

### Inspector tab

On the Inspector ID tab, you will enter the names of qualified inspectors. Off to the right side, your different types of inspections are listed. While you have an inspector selected, click on the type of inspection to each inspector is qualified for.

The screenshot shows the 'Inspector ID' tab with a table of inspectors and their associated inspection types. A list of inspection types is shown on the right side.

Inspector Initial and Name	Start Date	Type of Inspection
JD James Douglas	01/01/04	Building Inspections
*		Electrical Inspection
		Plumbing Inspection

## Weight Formula tab

This tab is used to correctly schedule the individuals that are able to perform each task.

**Saturation:** Saturation allows the system to calculate the percentage of scheduled inspection hours over the total work hours (8 hours/day and weekdays only) during the calculation.

**Weight:** When fairness is a criteria in selecting an inspector, using the weight formula can help determine which inspector is more likely to be scheduled.

Manual selection allows you to choose which inspector you want to use.

The other three options allow for the software to automatically select an inspector based on the radio button you choose.

## CREATING PERMIT TYPES

To access the setup area for permits, click on tools, setup options, permits.

The screenshot shows the 'Permit Type' window. On the left is a list of permit types: Basement Finish, Building Permit, BURNING IN STREET, Burning Permit, Demolition Permit, Electrical Permit, Mechanical Permit, Plumbing Permit, Sign Permit, Sprinkler System Permit, Tank Permit, TEST, and Well Permit. The 'Description' field is set to 'Basement Finish'. The 'Type' dropdown is set to 'Others'. The 'Select a prefix if using A-YY0000 numbering system' dropdown is set to 'B'. The 'Days Expired from Original Date' dropdown is set to '1 year'. The 'Days Expired from Previous Expiration' dropdown is set to '1 year'. The 'Unit Name by Which Permit is Charged' field is empty. The 'Valuation per Square Foot of Property' field is set to '0'. There is a checkbox for 'Minimum Job Value is based on Square Foot Value' which is unchecked. The 'Application Form' field shows 'C:\Sales\Prop Files\Building Permit.pdf' with 'Locate' and 'Preview' buttons. Below this is a 'Memo' field. At the bottom, there are two tables: 'Attached Fees' and 'Attached Inspections'. The 'Attached Fees' table has one row: 'Basement Finish' with 'DEMOLITION FEE'. The 'Attached Inspections' table has one row: 'Building Inspections'. At the very bottom are buttons: 'New Permit', 'Remove Selected', 'Setup Itemized Fees', and 'Show all available fees and inspections for selection'.

By default Banyon has certain permit types created. If you want to create a new permit, simply click on the new permit option on the bottom left and enter a description.

Once the permit has been named, you will need to fill out the information fields on the Permit Type screen.

**Type:** is used to group permits together for reporting purposes. A great way to get totals for monthly, quarterly, or yearly reports.

**Prefix:** If a prefix is used before the permit number you can enter it here. For Example a building permit could have B prefix and plumbing permit a P prefix.

**Days Expired From Original Date:** Enter the # of days to expire from the issue date.

**Days Expired From Previous Expiration:** Enter # of days to expire from last expiration when permit is re-issued.

**Application Form:** To attach a copy of your application for the permit, click on locate to browse where that file is.

You can create a folder on your network drive to store all permit applications in, and then link each one with the permit as permits are created.

To view an application, simply click the preview option to display. The application can also be printed directly from the permit screen (view, inquiry, permits)

## Electrical, Mechanical, & Plumbing Permit Types

These permit types can have an itemized fee list setup. For example on an electrical permit if the charge is so much per A/C, Dishwasher, Water Heater, etc then an itemized list can be set up for your charges. Then when you attach that permit type to a customer or property, the itemized list will pop up where you can fill in the number of each item and then a total will be calculated for the permit charge.

### Electrical

No.	Item Description	Load System Defaults	First Qty & Fee*	Add. Qty & Fee*
1	30 AMPS		1 \$4.00	1 \$3.00
2	60 AMPS		0 \$0.00	0 \$0.00
3	100 AMPS		0 \$0.00	0 \$0.00
4	200 AMPS		0 \$0.00	0 \$0.00
5	500 AMPS		0 \$0.00	0 \$0.00
6	A/C		0 \$0.00	0 \$0.00
7	Heat Pump		1 \$40.00	0 \$0.00
8	Air Handler		0 \$0.00	0 \$0.00
9	Dishwasher		0 \$0.00	0 \$0.00

### Mechanical

No.	Item Description	Load System Defaults	First Qty & Fee*	Add. Qty & Fee*
1	GF-Other Appliances		0 \$0.00	0 \$0.00
2	GF-Gas Pipe		0 \$0.00	0 \$0.00
3	GF-Water Heater		0 \$0.00	0 \$0.00
4	GF-Furnace		0 \$0.00	0 \$0.00
5	GF-Boiler		0 \$0.00	0 \$0.00
6	GF-Range		0 \$0.00	0 \$0.00
7	Furnace/AC		0 \$0.00	0 \$0.00
8	GF-Fireplace		0 \$0.00	0 \$0.00
9	GF-Unit Heater		0 \$0.00	0 \$0.00
10	Fireplace		0 \$0.00	0 \$0.00
11	GF-Dryer		0 \$0.00	0 \$0.00

### Plumbing

No.	Item Description	Load System Defaults	First Qty & Fee*	Add. Qty & Fee*
1	Inflammable Trap		1 \$2.00	0 \$0.00
2	Backflow Preventor		0 \$0.00	0 \$0.00
3	Dishwasher		0 \$0.00	0 \$0.00
4	Bathtubs		0 \$0.00	0 \$0.00
5	Sump Pump		0 \$0.00	0 \$0.00
6	Drinking Fountain		0 \$0.00	0 \$0.00
7	R/I Fixture		0 \$0.00	0 \$0.00
8	Floor Drain		0 \$0.00	0 \$0.00
9	Grease Trap		0 \$0.00	0 \$0.00
10	Roof Drain		0 \$0.00	0 \$0.00
11	Shower		0 \$0.00	0 \$0.00
12	Sink		0 \$0.00	0 \$0.00
13	Sewage Ejector		0 \$0.00	0 \$0.00
14	Urinal		0 \$0.00	0 \$0.00
15	Washer Stand Pipe		0 \$0.00	0 \$0.00
16	Water Closet		0 \$0.00	0 \$0.00
17	Water Softener		0 \$0.00	0 \$0.00
18	Water Heater		0 \$0.00	0 \$0.00
20	Other Fixtures		0 \$0.00	0 \$0.00
21	Laundry Tub		0 \$0.00	0 \$0.00
22	Lavatory		0 \$0.00	0 \$0.00
23	Lawn Irrigation		0 \$0.00	0 \$0.00

Each itemized fee screen can be set up to charge a certain amount for the first one, and then a separate amount for each additional one.

To create a new line item, simply enter a number and give it a description.

## ATTACHING FEES & INSPECTIONS

To attach fees and inspections, click on the [Show all available fees and inspections for selection](#) option on the bottom right. All fees and inspections that you have created will now show up. Next, highlight the fees and inspections that are applicable to this permit.

## ISSUING PERMITS TO PROPERTIES, OWNERS, & CONTRACTORS

Permits can be issued directly from the property, owner, contractor, or permit screen. We will explain how to issue from the property screen. Go to view, inquiry, and then select property.

To lookup a property record, use search drop down menu to enter a PIN or parcel #, property address, or owner's name. To do a partial search use wildcard characters (\* and ?). For example, Johnson\* will give you a list of all properties owned by persons whose last name is Johnson.

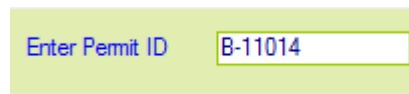
Selection	
Matched Names	Address
JOHNSON, HERBERT A & CARMEN J	1207 DONNA DR NW
JOHNSON, RICHARD C & BEVERLY	1310 LAKE CREST DRIVE
JOHNSON, LARRY J & CLAUDIA M	2414 BASSWOOD LANE
JOHNSON, PHILLIP A/ETUX	ROUTE 8 BOX 726
JOHNSON, DONALD C & JUDITH K	1011 GENEVA DRIVE
JOHNSON, DELORIS J	2510 CONIFER AVE
JOHNSON, RUSSELL D/ETAL	8093 E LK CARLOS DR NE
JOHNSON, TIMOTHY V & SHARON F	2106 IRVINE PLACE
JOHNSON, LEWIS N & JEANETTE E	1002 AGNES AVE
JOHNSON, SCOTT A & MARY D	408 NORTH PARK

Next, choose the Permit tab and click on **New Permit** on the bottom right. This will then bring up a list of available permits to choose from. If you need one that is not in the list, refer back to the permit setup section on page 25.

Legal	Zoning	Building	Owner	Assessment	Permit	License	Violation	Utility Billing	Fee	Attachment	Misc.
Permit		Status	Issued	Balance							
▶	No. B-11002 Basement Finish	Issued	08/10/11	\$1,350.00							
	No. 91339 Electrical Permit	Pending		\$0.00							
	No. 91340 Electrical Permit	Issued	06/29/11	\$56.00							
	No. 91341 Electrical Permit	Pending		\$61.00							
	No. 91342 Electrical Permit	Pending		\$0.00							
	No. B-11004 Basement Finish	Pending		\$1,350.00							
	No. 91343 Plumbing Permit	Pending		\$0.00							
	No. B-11005 Basement Finish	Pending		\$1,350.00							
	No. 91344 Mechanical Permit	Pending		\$0.00							
	No. 91345 Plumbing Permit	Pending		\$0.00							

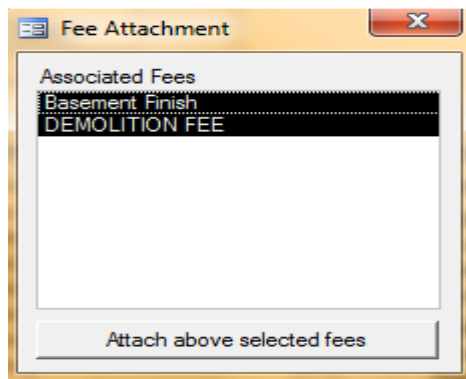
Permit No. B-11002  
Apply Date  
Issue Date 08/10/11  
Start Date  
Last Inspected  
Project Begin  
Project Complete  
Expire Date 08/10/12  
More Info New Permit

Once you have selected the Permit type from the list, a box will pop up with enter new permit number. You may use the defaulted number or enter your own.



Enter Permit ID

After you have assigned a number to the permit another window will come up with the fees that are associated with this permit type. If you have set the fees in setup options to always charged, then they will be highlighted in black automatically. If a fee was set to “pick from list when issued”, then it will not be highlighted by default but you can still select it. When ready to apply the fees, click on “attach above selected fees” button.

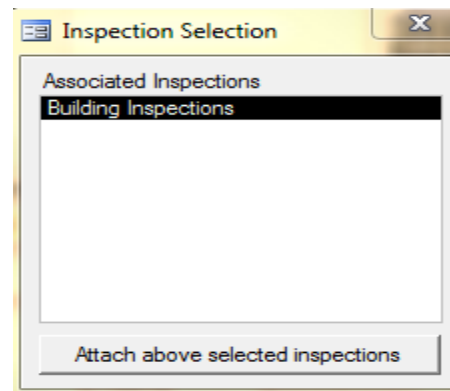


**Fee Attachment**

Associated Fees

Basement Finish
DEMOLITION FEE

Attach above selected fees



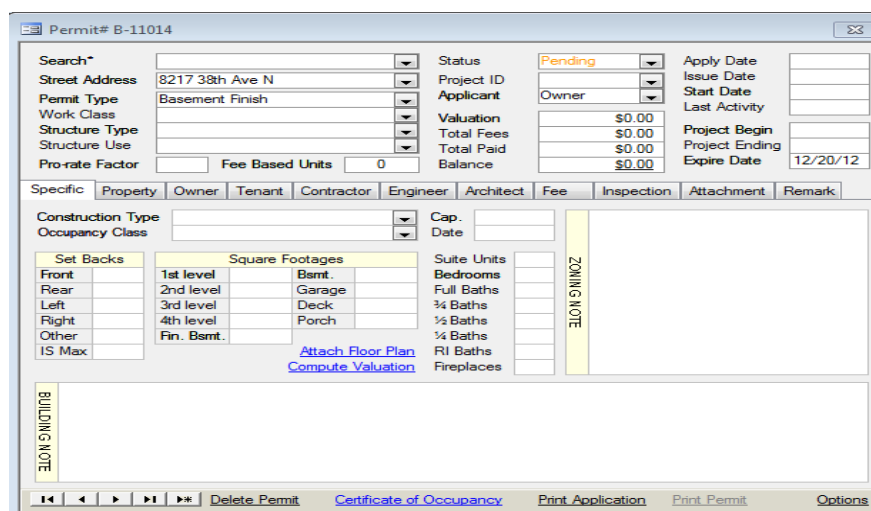
**Inspection Selection**

Associated Inspections

Building Inspections
----------------------

Attach above selected inspections

After the fees are attached the inspection selection screen will show up if this permit type was set to require an inspection.



**Permit# B-11014**

Search\*  Status **Pending** Apply Date

Street Address  Project ID  Issue Date

Permit Type  Applicant  Start Date

Work Class  Valuation  Last Activity

Structure Type  Total Fees  Project Begin

Structure Use  Total Paid  Project Ending

Pro-rate Factor  Fee Based Units  Balance  Expire Date

Specific **Property** Owner Tenant Contractor Engineer Architect Fee Inspection Attachment Remark

Construction Type  Cap. Date

Occupancy Class

Set Backs

Front	1st level	Basmt.	Suite Units
Rear	2nd level	Garage	Bedrooms
Left	3rd level	Deck	Full Baths
Right	4th level	Porch	¾ Baths
Other	Fin. Basmt.		¼ Baths
IS Max			RI Baths
			Fireplaces

Attach Floor Plan  
Compute Valuation

**BUILDING NOTE**

**ZONING NOTE**

Navigation:

Once the inspection is attached, the main permit screen should now appear and you can begin by filling in the information on the top of the screen. If the fees attached were all base fees, then the total fees box should be filled in. If this type of fee is based on a valuation or cost of work, enter the amount in the VALUATION box and press enter. The fees should now be updated again. A detailed view of the fees can be looked at by clicking on the fee tab.

## Specific tab

The specific for some permits will be different than others and it all depends on the permit type applied. This example is BUILDING type and has optional information to fill in like square footage, bedrooms, baths, & setbacks.

Specific	Property	Owner	Tenant	Contractor	Engineer	Architect	Fee	Inspection	Attachment	Remark
Construction Type					Cap.					
Occupancy Class					Date					
Set Backs		Square Footages				Suite Units		ZONING NOTE		
Front		1st level		Bsmt.		Bedrooms				
Rear		2nd level		Garage		Full Baths				
Left		3rd level		Deck		¾ Baths				
Right		4th level		Porch		½ Baths				
Other		Fin. Bsmt.				¼ Baths				
IS Max						RI Baths				
						Fireplaces				
						<a href="#">Attach Floor Plan</a>				
						<a href="#">Compute Valuation</a>				

The specific tab on permit types like **Electrical, Mechanical, & Plumbing** will show the itemized fees if you have chosen to set them up that way. You can also change the quantity if something was entered wrong. Click on [view all items](#) to pop the itemized fee menu back up and you can edit the amount in setup if it needs to be changed.

Specific	Property	Owner	Tenant	Contractor	Engineer	Architect	Fee	Inspection	Attachment	Remark
Item		Qty	Amount	Electrical Class						
30 AMPS		20	\$61	Number of Units						
60 AMPS		2	\$0	<input type="checkbox"/> New Electrical						
A/C		1	\$0	NOTES						
Heat Pump		2	\$40							
<a href="#">View All Items</a>										

## Property tab

Shows the zoning, property, dwelling type and a list of all permits pulled on the property along with the balance due.

The **more property info** option when clicked will allow you to view other tabs relevant to the property.

Specific	Property	Owner	Tenant	Contractor	Engineer	Architect	Fee	Inspection	Attachment	Remark
Status	Open									
Zone Type										
Property Type	Commercial									
Dwelling Type	test									
<input type="checkbox"/> Agriculture		<input type="checkbox"/> Septic								
<input type="checkbox"/> Commercial		<input type="checkbox"/> Well								
<input type="checkbox"/> Flood Plain										
<a href="#">More Property Info</a>										
Permit*				Status		Balance				
Basement Finish				Issued		\$1,350.00				
Electrical Permit				Pending		\$0.00				
Electrical Permit				Issued		\$56.00				
Electrical Permit				Pending		\$61.00				
Electrical Permit				Pending		\$0.00				
Basement Finish				Pending		\$1,350.00				
Plumbing Permit				Pending		\$0.00				
Basement Finish				Pending		\$1,350.00				
Mechanical Permit				Pending		\$0.00				
Plumbing Permit				Pending		\$0.00				
Basement Finish				Approved		\$0.00				
Building Permit				Issued		\$1,250.00				
Building Permit				Pending		\$0.00				
Basement Finish				Issued		\$1,350.00				
Electrical Permit				Pending		\$0.00				
Plumbing Permit				Pending		\$145.00				
* Click on record selector to switch view to that Permit										

## Owner & Tenant tabs

The owner tab will automatically show the owner of the property where the permit is being issued. The **More Information** option when clicked on will allow you to view tabs from the owners inquiry screen. For example, click on property and the owner's property tab will be displayed showing a list of all the properties they own.

Specific	Property	Owner	Tenant	Contractor	Engineer	Architect	Fee	Inspection	Attachment	Remark
----------	----------	-------	--------	------------	----------	-----------	-----	------------	------------	--------

If applicant is an owner, select one from below list

▶

☒ Olson, Chris

Attention

Address

8217 38th Ave N  
New Hope MN 55427

Home Phone

Work Phone

[More Information](#)

If this is a rental property and you want the tenant to be listed on the permit, select them from the names drop down. If they are not listed, click on \*new customer in the drop down menu to add.

## Contractor, Engineer, & Architect tabs

Select the drop down to choose a contractor from the list. Once the contractor is selected all the information will fill in regarding them.

If any information needs to be updated or added for the contractor, click on **More Info** and select contact and the main contractor screen will show. You can now update any information regarding the contractor. The more info option also allows you to view licenses, permits, violations, and other employees (agents).

Specific	Non-Fee Tracking	Department Check	Inspection	Fee	Applicant	Licensee	Contractor	Violation
----------	------------------	------------------	------------	-----	-----------	----------	------------	-----------

Contractor

Carlson Construction

Contract Type

General Contractors

Contact

Bill Carlson  
100 W. 3rd St  
Mpls MN 55337

State Lic#

99487572

Exp.

01/01/09

Insurance

State Farm

Exp.

03/01/09

Agent	Position	Phone
Jim Wilson	Sales Manager	(952) 882-7730

Other Registration Expirations

Vehicle	
Workers Comp.	
Bond	01/01/09
Liability	01/01/09

[More Info](#)

## Fee tab

Shows either the flat fees applied or fees based on valuation. (itemized fees for Plumbing, Mechanical, & Electrical will show under specific tab)

Fee	Amount	Penalty	Total Paid	Due Date
DEMOLITION FEE	\$250.00	\$0.00	\$0.00	
Basement Finish	\$2,150.00	\$0.00	\$0.00	

Total: \$2,400.00  
Paid: \$0.00  
Balance: \$2,400.00

Transaction Date & No.	Amount	Check #	Remark
------------------------	--------	---------	--------

**New Fee:** Clicking on the **New Fee** option will bring up a menu to select a fee from your set up to apply. If a fee needs to be added that is not in the list, click tools, setup options, & fees. (refer back to fee setup section in manual)

**Remove Fee:** To remove a fee, first click on the fee and then click **Remove Fee**. A confirmation message will appear to verify you want the selected fee to be removed.

Once the fees have been posted to the permit a history log will show at the bottom and display date, amount paid, check #, and comment.

## APPLYING PAYMENT FOR PERMIT, LICENSE, VIOLATION

To record payment of a permit, license, or violation fee click on the dollar amount by **Balance** and a menu will pop up asking if you want to create a new batch or add the payment to an existing batch. If creating a new batch then you will be prompted to enter in a batch name.

Enter Name of New Receipt Batch: 11-DEC-23

11-DEC-23 - 12/23/2011

In the Entry Description, enter Property PIN, Utility Account No, Property Address, Customer Name (for same-owner property selection), Permit ID (preceded with P), License No. (with L), Citation No. (with C), or Assessment No. (with A). Use the \* and ? wildcard for partial search on Property Address or Name.

Receipt Date: 12/23/11

Entry Description	Amount	Check #	Remark	Customer
Permit B-11018 - Basement Finish	\$2,400.00	4456	123 6TH AVE E	ROGER HARRIS
	\$0.00			ROGER HARRIS

Record a check number if wanted and then simply close the screen down. All other payments that come in for the day can be put into the same batch and posted at the end of day. (posting the receipt batch described on page 57)

**\*If an owner or contractor wants to pay for multiple permits & licenses see batch entry on page 56**



## PRINTING PERMIT


Once the permit status has been set to **ISSUED** you can now print the permit.

Click on  at the bottom to preview/print the permit

**DEMO DATA**  
121 MAIN AVENUE • CITY NAME, MN 55555 • 555-555-5555

Permit Type:	Basement Finish	Permit No.:	<b>B-11017</b>
Parcel No.:	88-9944-344 2232	Approved Date:	12/23/11
Work Valuation:	\$45,000.00	Expiration Date:	12/23/12

For inspections, call MetroWest at 763-479-1821



<u>Owner Information:</u> Olson, Chris 8217 38th Ave N New Hope MN 55427	<u>Contractor Information:</u>
---	--------------------------------

Work Description/Requirement:

Fee Description:

Basement Finish	\$2,150.00		
TOTAL FEE:	\$2,150.00	PAID:	\$2,150.00

Customize this footer area to your description

8217 38th Ave N

---

**THIS PERMIT MUST BE POSTED AT THE ABOVE WORK ADDRESS AT ALL TIMES**

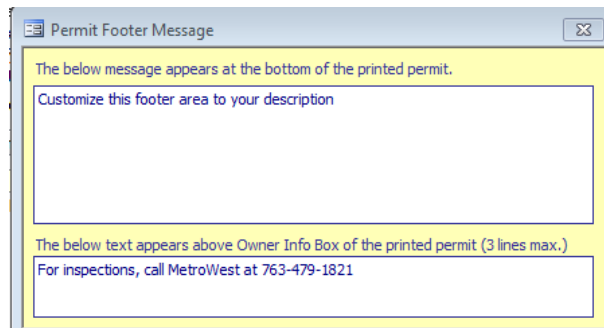
Signature: \_\_\_\_\_ Date: \_\_\_\_\_ City Approval: \_\_\_\_\_

## Permit Messages

To customize the message, click on **OPTIONS** in the bottom right of the permit screen. Next, click on setup options, then permit footer message

Top part is for footer message

Bottom box prints above owner info box on permit.



Permit Footer Message

The below message appears at the bottom of the printed permit.

Customize this footer area to your description

The below text appears above Owner Info Box of the printed permit (3 lines max.)

For inspections, call MetroWest at 763-479-1821

## Inspection tab

If the permit needs to have an inspection, click on the inspection tab and click on **New Schedule** on the right hand side.

Specific	Property	Owner	Tenant	Contractor	Engineer	Architect	Fee	Inspection	Attachment	Remark
Type of Inspection	Completed	Date/Time/Inspector	Status	(click to change)						
<input type="checkbox"/> Building Inspections										
				<a href="#">New Schedule</a> <a href="#">Move Schedule</a> <a href="#">Cancel Schedule</a>  <a href="#">Reselect Inspection</a> <a href="#">Inspection Records</a> <a href="#">Set Notice Printer</a>						

Once you have clicked on New Schedule, a schedule window will pop up. Here you will schedule the inspector and the time in which the inspection will take place. Simply click on the month arrow to move to a different month and then click on the day you would like. Next, click on the time and when ready, click on **Schedule** at the bottom.

***\*by default the name of the inspection will show on the calendar (next to the time) when scheduled. Any notes or description entered would replace it.***

If you have more than one inspector and select the least saturation box, it will show you which inspector has the least amount of work scheduled.

After it is scheduled you will be brought back to the main inspection tab. If a schedule needs to be changed in the future, click on **Move Schedule** to bring up the calendar and pick a new date/time.

Specific	Property	Owner	Tenant	Contractor	Engineer	Architect	Fee	Inspection	Attachment	Remark
Type of Inspection	Completed	Date/Time/Inspector	Status	(click to change)						
<input type="checkbox"/> Building Inspections		Thu 12/29/11 1:00p JD	Scheduled for Inspection							
				<a href="#">New Schedule</a> <a href="#">Move Schedule</a> <a href="#">Cancel Schedule</a>  <a href="#">Reselect Inspection</a> <a href="#">Inspection Records</a> <a href="#">Set Notice Printer</a>						

**Department Info:** Click on this to fill out what you want printed at the top of the inspection notice and inspection record.

[Inspection Notice](#)  
[Department Info](#)

**Inspection Notice:** Click and print to send out to customer (Sample is shown below)

**Changing Inspection Status:** Once the permit is issued and the inspection has been done you can click on the current status to pop up a status menu and change to pass, failed, etc (To add result options for inspections see setup on page 24)

### Sample Inspection Notice

**Building Inspection Department**  
**100 Main Avenue**  
**USTown, US, 55555**  
**999-999-9999**

12/23/11 8:35 AM  
Page 1

**Site Address:** 8217 38th Ave N  
**Permit Number:** B-11017  
**Type of Inspection:** Building Inspections

**Owner Name:** Olson, Chris  
**Date of Inspection:** Thursday December 29 20 at 1:00PM  
**Inspector:** James Douglas

---

**Comments/Corrections:** Everything looked good.

**Status of Inspection:** Scheduled for Inspection

**Signature:**

## Printing Inspectors Schedule

To view a calendar of inspections and print a schedule for a specific day click view, inquiry, and inspection.

***\*a short cut to the current days schedule can be printed from view, special reports, permit, and inspection schedule***

Inspection Schedules for December 23, 2011

Pick inspector and date to view scheduled inspections.

Inspector: James Douglas

Month: December 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Click on Time to view schedule; Address to view other permits; Permit # to view other inspections.

Time	Type of Inspection	Address	Note	Item ID
2:00PM	Building Inspections	8217 38th Ave N	Basement Finish	B-11017
4:00PM	Building Inspections	- 123 6TH AVE E	Basement Finish	B-11018

☐ Report Schedules For All Inspectors [View Schedules](#)

Click on an inspector and then use the arrow to choose a month and click on a specific day. If the inspector has anything scheduled that day it will be displayed. To print, click on **View Schedules**.

## Sample Inspection Schedule

### TOWN OF DELAFIELD

12/23/11 10:03 AM

Page 1

### Inspection Schedules

Inspector: James Douglas

Inspection Date 12/23/2011

2:00:00 PM  
bds  
8217 38th Ave N  
Building Inspections  
B-11017 Basement Finish

Comment: Building Inspections -  
Instruction:

4:00:00 PM  
bds  
- 123 6TH AVE E  
Building Inspections  
B-11018 Basement Finish

Comment: Building Inspections -  
Instruction:

-----

Inspectors can also use the

Block Time-Off

button to mark times they are not available for inspections.

Simply click on a starting time that day and scroll down with the mouse (click & drag) to the ending time and then click schedule.

Time	Type of Inspection	Address	Note	Item ID
2:00PM	Building Inspections	8217 38th Ave N	Basement Finish	B-11017
4:00PM	Building Inspections	123 6TH AVE E	Basement Finish	B-11018

To un-schedule an inspection or time off, simply click on the time to bring up the calendar. Once on the calendar screen, click on the time to Un-Schedule and click the Un-schedule button.

***\*if you want to re-schedule, simply click on a new time and then select re-schedule.***

While on the inspection schedule screen you can click on an actual property address and be brought to permit tab on that property. Furthermore, clicking on the item id (permit #) will call up that actual permit on the permit screen.

## Inspector Log

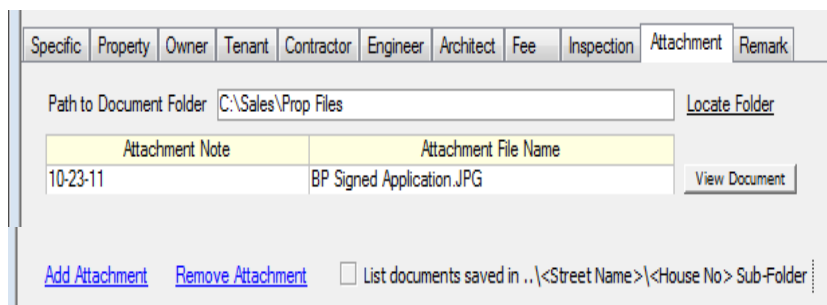
For those entities that do not have wireless access while out in the field, any inspections notes made can be synchronized back with the main database when inspectors get back to the office.

Example, take laptop out into the field and mark inspections as pass, failed, re-scheduled, etc. Come back to the office and sync the notes made to the main database.

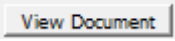


When back at the office and connected back up to the network go to view, inquiry, and inspector log. Verify the path to central database (where the main data is stored), select the inspector, and click the **Synchronize Inspection Data** button on the bottom left.

## Attachment tab



To attach a document, pdf, or jpg file to this permit you first need to click on the locate folder option and set a central path to where all your permit documents are located. Once that is established, simply click on **Add Attachment** button and click on the correct attachment and then click on select.

To view that document, click on the  button.

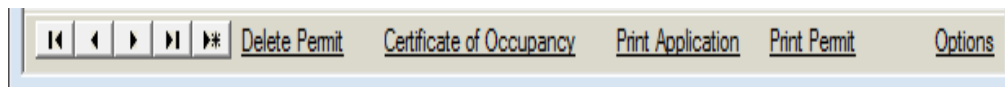
## Remark tab



This will allow you to enter more work description and other misc. notes needed regarding the permit.

The check boxes can also be customized if a lists of steps need to be completed regarding the permit. Simply click on the description to change. The check box descriptions will be saved for the each **PERMIT TYPE** as well. So, you can have a different checklist for all building, electrical, plumbing, and mechanical permits.

## Permit Screen Bottom Menu



The arrow buttons will switch between permits. The **|<** button will go to the very first permit where the **>|** button will go to the last permit. The **>\*** button will create a new permit.

**Delete Permit:** Look up the permit to delete and then click the Delete Permit button.

**Certificate of Occupancy:** Print out for customer. To customize this form click on options on the right, select setup options, and then certificate of occupancy.

Fill in the information and select the radio button for either a full size or half page. If a different form is wanted, you can customize using the **Design** feature.

**Print Application:** If an application was linked to a permit in the setup options (page 26), then it can be printed directly from the permit screen.

## Quarterly Permit Surcharge Report

To access this report go to view, special reports, permit, and select Quarterly Surcharge Report.

Quarterly Permit Surcharge Report

Municipality

Demonstration Data  
Address  
Your City, US 55427  
800-229-1130

Contact

Tom Gray  
Certification #1852  
952-443-3596

Reporting Quarter

1st/2009

[Print Report](#)

Permits Based on Fixed Fees less than \$100				
Permit Type	Number of Permits	Surcharge	Total Surcharge	
Building	0	\$8.00	\$0.00	
Electrical	0	\$0.50	\$0.00	
Mechanical	0	\$0.50	\$0.00	
Plumbing	0	\$0.50	\$0.00	
Others	0	\$0.50	\$0.00	
Total			\$0.00	

Permits Based on Fixed Fees \$100 or more				
Permit Type	Number of Permits	Total Fee	Multiplier	Total Surcharge
Building	0	\$0.00	0.0050	\$0.00
Electrical	0	\$0.00	0.0000	\$0.00
Mechanical	0	\$0.00	0.0050	\$0.00
Plumbing	0	\$0.00	0.0050	\$0.00
Others	0	\$0.00	0.0050	\$0.00
Total				\$0.00

Building Permits Based on Valuation				
Construction Value Range	Number of Permits	Total Valuation	Multiplier	Total Surcharge
\$1,000,000 or Less	0	\$0.00	0.4456	\$0.00
\$1,000,001 to \$2,000,000	0	\$0.00	1.0000	\$0.00
\$2,000,001 to \$3,000,000	0	\$0.00	1.0000	\$0.00
\$3,000,001 to \$4,000,000	0	\$0.00	2.0000	\$0.00
\$4,000,001 to \$5,000,000	0	\$0.00	3.0000	\$0.00
Total				\$0.00

Mechanical Permits Based on Valuation				
Construction Value Range	Number of Permits	Total Valuation	Multiplier	Total Surcharge
\$1,000,000 or Less	0	\$0.00	1.0000	\$0.00
\$1,000,001 to \$2,000,000	0	\$0.00	0.0000	\$0.00
\$2,000,001 to \$3,000,000	0	\$0.00	3.0000	\$0.00
\$3,000,001 to \$4,000,000	0	\$0.00	4.0000	\$0.00
\$4,000,001 to \$5,000,000	0	\$0.00	5.0000	\$0.00
Total				\$0.00

Electrical Permits Based on Valuation				
Construction Value Range	Number of Permits	Total Valuation	Multiplier	Total Surcharge
\$1,000,000 or Less	0	\$0.00	0.0000	\$0.00
\$1,000,001 to \$2,000,000	0	\$0.00	0.0000	\$0.00
\$2,000,001 to \$3,000,000	0	\$0.00	0.0000	\$0.00
\$3,000,001 to \$4,000,000	0	\$0.00	0.0000	\$0.00
\$4,000,001 to \$5,000,000	0	\$0.00	0.0000	\$0.00
Total				\$0.00

Plumbing Permits Based on Valuation				
Construction Value Range	Number of Permits	Total Valuation	Multiplier	Total Surcharge
\$1,000,000 or Less	0	\$0.00	1.0000	\$0.00
\$1,000,001 to \$2,000,000	0	\$0.00	2.0000	\$0.00
\$2,000,001 to \$3,000,000	0	\$0.00	2.0000	\$0.00
\$3,000,001 to \$4,000,000	0	\$0.00	2.0000	\$0.00
Total				\$0.00

Other Permits Based on Valuation				
Construction Value Range	Number of Permits	Total Valuation	Multiplier	Total Surcharge
\$1,000,000 or Less	0	\$0.00	0.000	\$0.00
\$1,000,001 to \$2,000,000	0	\$0.00	2.000	\$0.00
\$2,000,001 to \$3,000,000	0	\$0.00	1.000	\$0.00
\$3,000,001 to \$4,000,000	0	\$0.00	0.000	\$0.00
\$4,000,001 to \$5,000,000	0	\$0.00	0.000	\$0.00
Total				\$0.00

Surcharge Report Summary		
Adjustment Explanation	Total Surcharges	\$0.00
	Less Retention ( \$5.00 ) or 4.00%	\$5.00
	Adjustments	\$0.00
	Total Payment to the State	(\$5.00)



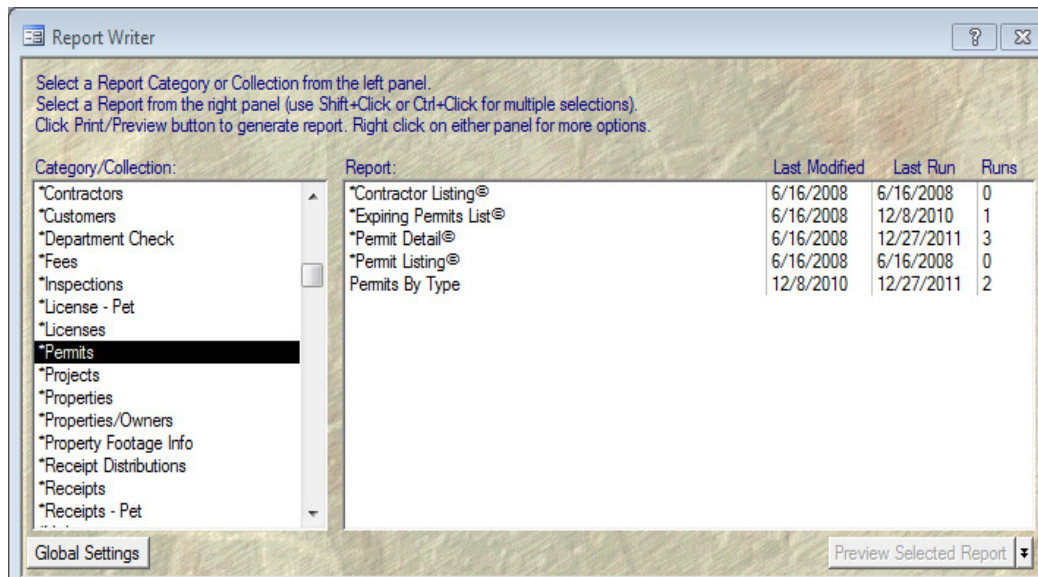
## REPORT WRITER

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.

To create your own reports, right click on an existing report and choose new. For detailed information on creating reports, please refer to the report writing manual.

Keep in mind that any data entered into Property Management can be reported on. Sorting/grouping can be done by Permit Type and date to get totals.



## Business Licensing Module

The first step is to create fees for your licenses. Please refer back to page 18 regarding creating fees or select tools, setup options, and fees.

### CREATING LICENSES

To begin creating licenses select tools, setup options, then licenses. A few licenses will be created by default. However, to add a new license, click on **NEW LICENSE** in the bottom left and enter a name.

Enter Description

The screenshot shows the 'License Type' window. On the left is a list of license types: Business, Dog License, and Liquor On Sale (which is selected). The main area contains various configuration options: Description (Liquor On Sale), Type (Generic), Category (Liquor), checkboxes for Deposit Required, Investigation Fee Required, Bond Required, Insurance Required, Pro-Rating Allowed, and Renewable (checked), Days Expired (1 year), and a section for renewal notices. There are buttons for 'Design Certificate', 'Refundable', 'Design 1st Notice', 'Design 2nd Notice', and 'Design 3rd Notice'. At the bottom, there are sections for 'Available Fees Setup' (listing Bus License, Business License, Liquor On Sale, PET LICENSE, Pet License Renewal, Sewer Assessment Fee, and Sewer Debt Service Quarter 1 2) and 'Available Departments Setup' (listing Fire and Police). A 'New License' button is at the bottom left, and a 'Remove Selected' button is at the bottom right. A checkbox at the very bottom allows for 'Use YY000 numbering format for all licence types' and another for 'Create new license and expire existing one when Renewal is paid'.

**Type:** Assigning a license type is used for reporting purposes. Reports can be totaled by license type.

**Category:** How the licenses are grouped when attaching to customers. When issuing a new license a menu pops up by license category, making it easier to select. Select the category and it shows the available licenses to attach.

**Design Certificate:** You can design “license” that you want the software to print. This area can get a little complicated, so it is best to email or fax your current form to Banyon and we can help you create the first few.

The next areas to look at are the check boxes. If a deposit is required, investigation fee, or bond, simply check those boxes and then enter a dollar amount if there is a charge for those. If proof of insurance is required before the license is issued, check that box.

If the license is renewable, check that box and then enter how long before it expires.

**Application Form:** To attach a copy of your application for the license, click on locate to browse where that file is. You can create a folder on your network drive to store all the license applications in, and then link each one with the license as they are created.

To view an application, simply click the preview option to display. The application can also be printed directly from the bottom menu on the license screen (view, inquiry, and license)

**Units:** This tells you what the units are for a license: For example, a taxi cab license would be charged per taxi so the unit would be TAXI. An arcade license might be charged per "MACHINE"

**Renewal Notices: (the design can get complicated) sometimes better to call and let us walk you through)**

The license software will also send out renewal notices if a customer has not renewed by the number of days you select in the boxes. Up to 3 renewal notices can be sent.

Number of days selected renewal notice to be sent before expire date:		
1st Notice If Over	30 days	<a href="#">Design 1st Notice</a>
2nd Notice If Within	30 days	<a href="#">Design 2nd Notice</a>
3rd Notice If Within	90 days	<a href="#">Design 3rd Notice</a>

To design your renewal notices click on [design 1<sup>st</sup> notice](#)

The screenshot shows a software window titled "1st Notice Design". Inside, there's a yellow background with several text boxes. At the top, there are two boxes: one containing `=bds_entityname()` and another containing `=bds_entityaddress()`. To the right of these is a box with `=["EXPIRED "].[expire date]`. Below these is a box with `=["licensee name"].chr(13).chr(10).["licensee address 11"]`. In the center, there's a box with the text "RENEWAL NOTICE". At the bottom, there's a large box with the text "Your [licensee name] is about to expire. Return this notice with full payment for renewal." On the right side of the window, there's a sidebar with a "Help" button, a "Create Text Box" button, and a "Paper Format" section with radio buttons for "Landscape", "Portrait", and "Half Page". Below that is an "Include" section with checkboxes for "Logo", "Signature", and "Border Frame". At the bottom of the sidebar are buttons for "Preview Sample", "Clear Screen", "Reset Design", and "Replicate From".

The default text boxes can be clicked and dragged to move around. To edit the text in a box right click on it and select "edit text"

To create a new text box, click on create text box in top right and then place it where you want and choose edit text.

**Editing Text:** When editing the text boxes you can type any information needed. You can also click on any heading under variable fields and it will be displayed with brackets and the heading name. This information will then automatically be inserted. For example {licensee name} would then input the customer name automatically when printed.

## ATTACHING FEES & DEPARTMENTS

To attach fees and departments, click on the [Show all available fees and departments for selection](#) option on the bottom right. All fees and departments that you have created will now show up. Next, highlight the fees and departments that are applicable to this license. If a fee does not show up, click on setup and add. Refer to rate setup if needed on page 18.

The screenshot displays a software interface for attaching fees and departments. It features four main panels arranged in a 2x2 grid. The top-left panel, titled 'Attached Fees Setup', contains a single entry 'On Sale Liquor'. The top-right panel, titled 'Attached Departments Setup', is currently empty. The bottom-left panel, titled 'Available Fees Setup', lists several options: 'Bus License', 'Business License', 'On Sale Liquor' (which is highlighted with a black background), 'PET LICENSE', 'Pet License Renewal', 'Sewer Assessment Fee', and 'Sewer Debt Service Quarter 1 2'. The bottom-right panel, titled 'Available Departments Setup', lists 'Fire' and 'Police'. At the bottom center of the interface, there is a button labeled 'Show only attached fees and departments'.

If departments are not used, then that part can be skipped. If they do not show, click on setup to add. Enter the department name in the box and close out. The departments will now be in the list to select.

This screenshot shows a small dialog box titled 'License Department Check'. It contains a list with two items: 'Police' and 'Fire'. A vertical scrollbar is visible on the right side of the list.

When a license is created there is a department check tab that will allow you to mark if it has passed the department check and make other notes.

The last area to address regarding creating licenses is the numbering format.


The screenshot shows a horizontal bar with two checked checkboxes. The first checkbox is followed by the text 'Use YY000 numbering format for all licence types'. The second checkbox is followed by the text 'Create new license and expire existing one when Renewal is paid'.

By default a number is used. However, if you want the last 2 digits of the year to be first, check the box at the bottom.


Additionally if you want a new license created and the existing one expired when a renewal is created, check that box.

## ISSUING LICENSES TO CUSTOMERS

You can issue a license to a customer 3 different ways: from the owner, property, or license screen. We will talk about issuing directly from the license screen.

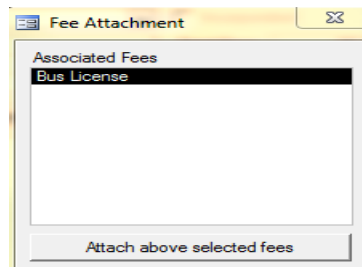
So, from view, inquiry, and license you will be brought to the last license created or a blank screen if no licenses have been created. In the bottom left click on the  button to add a new license.

A menu will then pop up listing all your categories of licenses created in setup. Click on the category and then the available licenses will be displayed. Click on the license and then enter the license id/number



Enter License ID

After you have assigned a number to the license another window will come up with the fees that are associated with this license. If you have set the fees in setup options to always charged, then they will be highlighted in black automatically. If a fee was set to “pick from list when issued”, then it will not be highlighted by default but you can still select it. If you have a renewal fee showing, it will not be charged if it is not highlighted. The renewal fees are set up to be charged only when the license is renewed. When ready to apply the fees, click on **attach above selected fees** button.



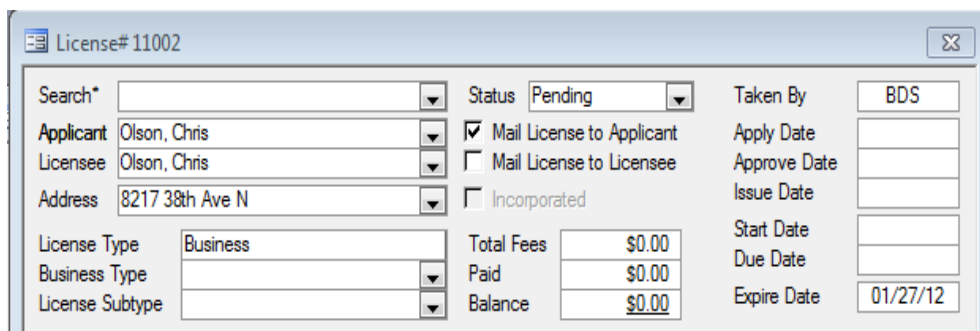
Fee Attachment

Associated Fees

Bus License
-------------

Attach above selected fees

After the fees are attached, the main licensing screen will appear.



License# 11002

Search*	<input type="text"/>	Status	Pending	Taken By	BDS
Applicant	Olson, Chris	<input checked="" type="checkbox"/>	Mail License to Applicant	Apply Date	<input type="text"/>
Licensee	Olson, Chris	<input type="checkbox"/>	Mail License to Licensee	Approve Date	<input type="text"/>
Address	8217 38th Ave N	<input type="checkbox"/>	Incorporated	Issue Date	<input type="text"/>
License Type	Business	Total Fees	\$0.00	Start Date	<input type="text"/>
Business Type	<input type="text"/>	Paid	\$0.00	Due Date	<input type="text"/>
License Subtype	<input type="text"/>	Balance	\$0.00	Expire Date	01/27/12

Next look up the applicant, licensee, or address the license will be applied to. **DON'T USE THE SEARCH BOX AS THAT IS TO LOOK UP EXISTING LICENSES.**

License Type	Business
Business Type	
License Subtype	

**License Type:** If this was filled in during setup, then it will appear. If you need to assign a type, go to tools, setup options, and licenses to assign.

**Business Type:** Used for reporting purposes if you want to break reports down for licenses by commercial, residential, industrial, institutional, or public. If a business type needed is not in the list, go to tools, setup options, and setup codes and descriptions. Under the license section click on **Business Type** and then type in what is needed.

**License Sub Type:** Used for reporting purposes to get reports by sub type. For example if it is a liquor license the type could be Liquor and then sub types could be “on sale” and “off sale”

Next, continue filling in the other information on the top portion of the screen. Select the check box to either mail to applicant or licensee.

Status	Pending	Taken By	BDS
<input checked="" type="checkbox"/> Mail License to Applicant		Apply Date	
<input type="checkbox"/> Mail License to Licensee		Approve Date	
<input type="checkbox"/> Incorporated		Issue Date	
Total Fees	\$6.25	Start Date	
Paid	\$0.00	Due Date	
Balance	\$6.25	Expire Date	01/27/12

The fees might or might not show yet. If the fee is based on valuation you will enter that information on the specific tab. If the fees were flat amounts, then they should show.

**Balance:** Clicking on the balance will allow you to process the payment for the license by adding it to a current batch or creating a new one. (See receipt entry on page 31.

Next, fill in the dates needed to track. The expire date will automatically fill in if an “expire” option was entered in setup options. If it did not fill in, you can go to tools, setup options, then select license. Fill in the Expire Days drop down.

## Specific tab

Use the memo field to enter any notes needed for this license.

If the license type was set to “**business**” in the setup and fee was marked as “**add itemized fees**” then the specific tab will show the following information.

		% of Valuation	Valuation	
Square Footage	3000	0.1000	\$3.00	<input checked="" type="checkbox"/> Use only larger valuation as fee
Business Dollar Volume	\$500,000	0.0012	\$6.25	

**Square Footage:** Enter the square footage and the % valuation to calculate the valuation dollar amount..



## Inspections tab

A customized checklist can be setup by license type if inspections are needed.

Simply click on a check box heading to change the description.  
The checkbox can then be marked to set, pass, or fail.

Specific	Non-Fee Tracking	Department Check	Inspection	Fee	Applicant	Licensee	Contractor	Violation
				<b>User-Defined Check List</b> (click on label at right of checkbox to change text)				
				<b>Set-Pass-Fail</b>				
				<input type="checkbox"/> Check Box 1				
				<input type="checkbox"/> Check Box 2				
				<input type="checkbox"/> Check Box 3				
				<input type="checkbox"/> Check Box 4				
				<input type="checkbox"/> Check Box 5				
				<input type="checkbox"/> Check Box 6				
				<input type="checkbox"/> Check Box 7				
				<input type="checkbox"/> Check Box 8				
				<input type="checkbox"/> Check Box 9				
				<input type="checkbox"/> Check Box 10				
				<input type="checkbox"/> Check Box 11				
				<input type="checkbox"/> Check Box 12				

## Fee tab

This tab will show a detailed breakdown of the charges for the fee.

Specific	Non-Fee Tracking	Department Check	Inspection	Fee	Applicant	Licensee	Contractor	Violation
				<b>Fee</b>	<b>Amount</b>	<b>Penalty</b>	<b>Total Paid</b>	<b>Due Date</b>
				▶ Bus License	\$6.25	\$0.00	\$0.00	
				<a href="#">New Fee</a> <a href="#">Remove Fee</a> <a href="#">Adjustment</a>				
				<b>Total</b>	\$6.25			
				<b>Paid</b>	\$0.00			
				<b>Balance</b>	\$6.25			
				<b>Transaction Date &amp; No.</b>	<b>Amount</b>	<b>Check #</b>	<b>Remark</b>	

**New Fee:** Attach a fee if it was missed. The fee menu will appear. If the fee is not in the menu, it will need to be added via tools, setup options, and then fees.

**Remove Fee:** To delete a fee from the license, click on the fee and then select Remove Fee on the right.

If a payment has been made for the license, it will show the transaction date, amount, and check number at the bottom.

**Balance:** Click on balance to process a payment for this license. It can be added to the current batch or a new batch can be created. (Discussed page 31)



## Applicant & Licensee tab

These will normally contain the same information unless you have selected a different applicant from the licensee. From the drop down, you can change the name.

The information on this screen automatically fills in based on what was entered in setup on the owner screen. If driver's license, phone, or birth date needs to be updated, click on **MORE INFO** and select personal. The owner screen will now appear where that information can be entered.

Specific	Non-Fee Tracking	Department Check	Inspection	Fee	Applicant	Licensee	Contractor	Violation
Licensee	Olson, Chris							
Attention				Drivers Lic #				
Address	8217 38th Ave N New Hope MN 55427			Soc Sec #				
				Birth Date				
Home Phone				Weight				
Work Phone				Height				
	<a href="#">More Info</a>			Eye Color				
				Hair Color				

**More Info:** Clicking on this will pop up a menu to be taken to the tabs on the owner, property, permits issued, licenses issued, violations issued, etc.

## Contractor tab

Select the drop down to choose a contractor from the list. Once the contractor is selected all the information will fill in regarding them.

If any information needs to be updated or added for the contractor, click on **More Info** and select contact and you will be brought to the main contractor screen. The more info option also allows you to view licenses, permits, violations, and other employees (agents).

Specific	Non-Fee Tracking	Department Check	Inspection	Fee	Applicant	Licensee	Contractor	Violation																	
Contractor	Carlson Construction			Contract Type	General Contractors																				
Contact	Bill Carlson 100 W. 3rd St Mpls MN 55337			State Lic#	99487572	Exp.	01/01/09																		
				Insurance	State Farm	Exp.	03/01/09																		
<table border="1"><thead><tr><th>Agent</th><th>Position</th><th>Phone</th></tr></thead><tbody><tr><td>Jim Wilson</td><td>Sales Manager</td><td>(952) 882-7730</td></tr></tbody></table>				Agent	Position	Phone	Jim Wilson	Sales Manager	(952) 882-7730	<table border="1"><thead><tr><th colspan="2">Other Registration Expirations</th></tr></thead><tbody><tr><td>Vehicle</td><td></td></tr><tr><td>Workers Comp.</td><td></td></tr><tr><td>Bond</td><td>01/01/09</td></tr><tr><td>Liability</td><td>01/01/09</td></tr></tbody></table>				Other Registration Expirations		Vehicle		Workers Comp.		Bond	01/01/09	Liability	01/01/09	<a href="#">More Info</a>	
Agent	Position	Phone																							
Jim Wilson	Sales Manager	(952) 882-7730																							
Other Registration Expirations																									
Vehicle																									
Workers Comp.																									
Bond	01/01/09																								
Liability	01/01/09																								

## Violation tab

Will show any violations for the owner or property incase violations need to be taken care of before the license is issued. Clicking on a listed violation and then selecting more info will bring you to that violation detail.

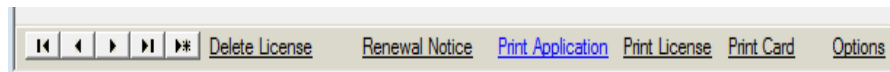
Specific	Non-Fee Tracking	Department Check	Inspection	Fee	Applicant	Licensee	Contractor	Violation
Type of Violation		Date	Status	Balance Due				
▶ Junk in Yard		04/14/08	1st Notice	\$0.00				
Junk in Yard		01/07/09	1st Notice	\$0.00				
Junk in Yard		01/08/09	1st Notice	\$0.00				
Junk in Yard		05/18/09	1st Notice	\$0.00				
Junk in Yard		09/22/09	1st Notice	\$0.00				
Junk in Yard		11/10/09	1st Notice	\$0.00				
Junk in Yard		12/21/09	1st Notice	\$0.00				
Junk in Yard		11/10/10	1st Notice	\$0.00				
Junk in Yard		11/14/11	1st Notice	\$0.00				

You can also set violations up for any infractions like “liquor violation”. If that violation is created it can then be attached to the license by clicking on **NEW VIOLATION**.

You also have the option to create and send a notice out for the violation.

***The setup of violations is done under tools, setup options, and violations. Setting up violations is on the next page.***

## License Screen Bottom Menu



The arrow buttons will switch between permits. The |< button will go to the very first license where the >| button will go to the last license. The >\* button will create a new license.

**Delete License:** Look up the license to delete and then click the Delete License button.

**Renewal Notice:** If a renewal notice needs to be printed, select this and then the type of renewal notice 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>. The notices can be setup in tools, setup options, and licenses. Choose the license and then click on **DESIGN NOTICE**. (setup help page 42)

**Print Application:** If an application was linked to the license in the setup options (page 42), then it can be printed directly from the license screen.

**Print License:** If a license was designed in setup, then it can be printed here. To setup select tools, setup options, then license. Click on **DESIGN CERTIFICATE**

**Print Card:** if any type of “license card” needs to be carried by someone it can be setup and printed.

**Renew License:** To renew a license, click on **OPTIONS** in the bottom left and select flag for renewal. The status will then be switched to renewal.

## SETTING UP VIOLATIONS

The violations module can be used to send letters to anyone who is not conforming to local code enforcement. Violations can be set up for not mowing, junk in yard, untagged cars in driveway, etc.

To begin setting up this module select tools, setup options, and then violations. If no violation types have been setup, you will be prompted to enter a new description to create the first one.

Enter Description of New Violation

To enter additional violation types click on **NEW VIOLATION** in the bottom left.

Once the violation type is given a description, the screen will display all the setup information.

Notice	Deadline	Fine and Penalty	Repeat	Template
<input checked="" type="checkbox"/> 1st	7 Days	\$25.00	1	1st Notice
<input type="checkbox"/> 2nd	30 Days	\$50.00	1	2nd Notice
<input type="checkbox"/> 3rd	60 Days	\$200.00	1	3rd Notice
<input type="checkbox"/> 4th	90 Days	\$500.00	1	4th Notice

**Violation Category:** The category is used for reporting purposes to get totals by each category.

**Distributed Account:** If you have Banyon Fund Accounting, click on the DISTRIBUTED ACCOUNT heading to locate where the data is stored. Once it is linked, the drop down will contain a list of accounts to apply the revenue to.

If you are not using Banyon Fund Accounting, simply type in your account code.

**Notice:** Up to 4 different notices can be set up. Check each notice box that you will use for this violation type.

**Deadline:** Each notice can have a deadline set and the “fine” amount would automatically be applied if not complied with. A violation set to 0 days would apply the fine instantly.

**Fine & Penalty:** Enter the amount of the proposed fine and enter a penalty percent.

**Repeat:** Determines how many times a notice is repeated before going to the next notice. For example, you only have one notice setup up with a deadline of 7 days and the repeat column is set to 3. What would happen is the same fine and notice would be generated every 7 days with the fine applied.

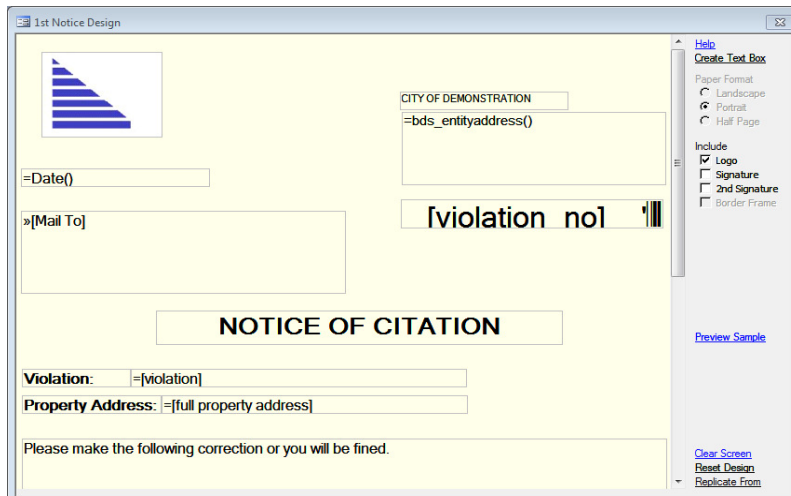
**Send Selected Notices To:** Simply click for each option listed who should receive the notices.

**Certify Balance:** If this box is checked and the final notice has expired, the balance will be certified to the violator's property taxes. **(This feature is in development)**

**Remove Violation:** If a violation type is no longer needed, simply click on it on the left hand side and then click Remove Violation on the bottom left.

## DESIGNING NOTICES

Default notices are set up, but you can easily customize them to your needs. The notices can be realigned to fit into a window envelope.

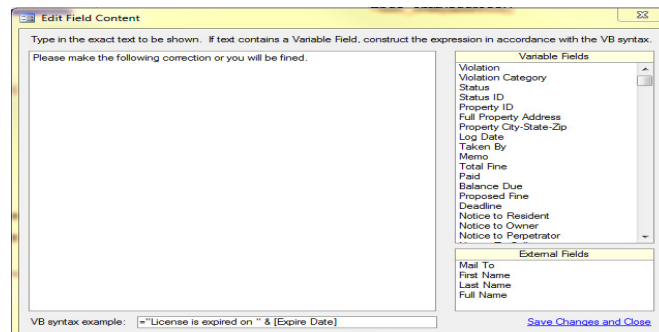


**Logo Insertion:** The first step is to decide if you want a logo to print out on the notices or you can use letterhead as well. To insert a logo, click on the logo check box on the right and logo box will appear. Next, drag the logo box to where you want it to appear and then click to place. Next, the locate image screen will appear so you can browse to where your logo is stored. Use the “look in” drop down box to browse and select. The logo will now appear.

Once placed, the logo box can be rearranged by clicking on it and then moving it to a new location. The box can also be widened by putting the cursor on the boarder until the “double arrow” shows. Click and then move the cursor to widen.

**Signature:** steps for adding a signature to the violation are the same as adding a logo. Two signature boxes can be added. If scanning services are needed for signatures, please contact Banyon and we can scan in for a fee of \$50.

**Editing Text Boxes:** To edit a text box simply right click on it and then choose edit text or font. Edit font will allow you to change the font size and font type. To change the wording, select edit text to display the “Edit Field Content” screen



From this screen you can type whatever information you want to appear on the violation.

On the right there is a box called “variable fields” and clicking on one of the options will automatically fill in information when the violation is printed. For example, clicking on proposed fine would then show what the fine amount would be if the customer does not comply. A sentence example is below if you use “Violation”, “Deadline”, and “Proposed Fine” from the right hand column.

You are currently breaking code enforcement with **[violation]**. This needs to be complied with by **[deadline]** to avoid a fine of **[proposed fine]**.

When the letter is printed, the violation name will be inserted, along with deadline date, and the proposed fine dollar amount. If the code enforcement office made specific memo notes on what needs to be cleaned up, the “memo” field can also be included on the violation letter.

Once you are done editing the text box, click on **Save Changes and Close** on the bottom right. **ANY CHANGES WILL BE DISGARDED IF YOU USE THE X TO CLOSE WITHOUT SAVING FIRST.**

**Adding Text Box:** To add a text box, simply click on create text box from the top right and then place it where you want. After you place it, a menu box will appear and you would want to choose edit text to enter the desired information.

**Remove Text Box:** To remove a text box, right click on it and select REMOVE.

**Preview Sample:** This option can be clicked on at any point to see how the violation notice will look when printed.


**Clear Screen:** Clicking on this will delete all information on the screen to start fresh.

**Reset Design:** Clicking on this will reset the design to Banyon’s Default design.

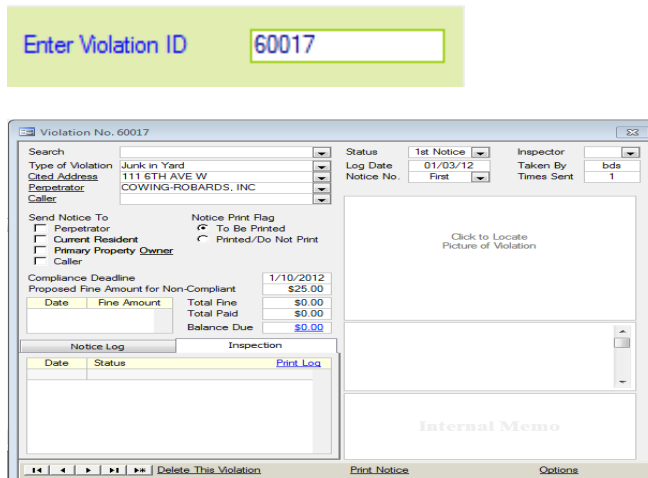
**Replicate Form:** This is used if you are on the 2<sup>nd</sup>, 3<sup>rd</sup> or 4<sup>th</sup> notice and you want to replicate one of the previous notices for this violation type. For example if you are on the edit of the 4<sup>th</sup> notice and click on replicate form you will have the option of selecting the template from notice 1, 2, or 3 and then begin making changes for the 4<sup>th</sup> notice.

## ADDING VIOLATIONS TO PROPERTIES & OWNERS

Violations can be attached from the Property, Owner, Contractor, or License screens from the violations tab. Next, click on new violation to bring up the violation category menu to select and then select the violation to attach.

The other way to attach is going directly to view, inquiry, and then violation to bring up the violation screen. Next, click on the  on the bottom menu and then a list of categories will appear to select violation.

After the violation is selected the # box will appear where you can enter a new number or simply accept the default number and press enter.



**Cited Address:** If entering directly from the violation screen, then the cited address will be entered first and the perpetrator name will automatically fill in. If the name needs to be changed, select it from the drop down list.

***If the violation is entered directly from the property screen under the violation tab, then the address and perpetrator are filled in automatically.***

**Send Notice To:** The check boxes should default based on your first notice settings for that violation type. If not, check who you want the notice to go to.

**Deadline & Fine:** The compliance deadline and amount will also be filled in based on the setup information, but can be edited on this screen.

**Picture of Violation:** If a picture needs to be stored and is already saved to a central location on your computer or server, then it can be attached here. Simply click on the picture box to browse and locate.

**Violation Memo:** Notes entered here can be included on the actual notice that gets sent out. When designing the notice, select the “memo” field to be included. This way specific information can be explained to the perpetrator.

**Internal Memo:** This memo field is used for staff viewing only and will not print out on the violation.

**Notice Log:** As notices are printed and sent the log is automatically updated so you can see the date, who the notice was sent to, and what notice number it was.

**Inspection:** Inspection date and status can be logged. To enter a status, simply click on the box to choose from one of the options

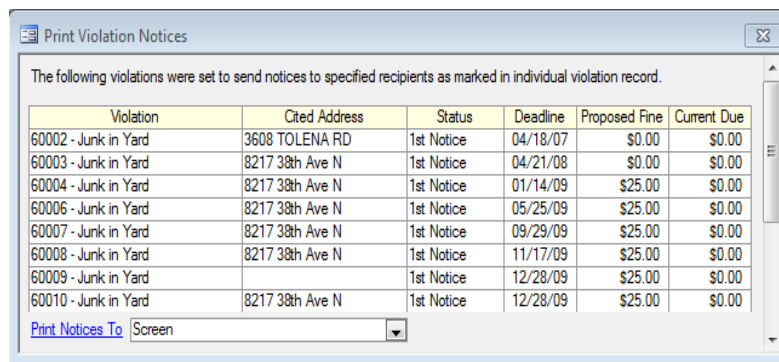
**Status:** If the status box is not changed to complied, then the proposed fine will automatically show as a balance due on the deadline date.

**Print Notice:** This will generate the notice to the screen. If you want it to print directly to the printer, click on **Options** on the bottom and then choose **Set Notice Printer and** then select the printer to send directly to.

## PROCESSING NON COMPLIANCE VIOLATIONS

Once a day or week you will have to run the Expired Non Compliance Routine. To do this click on view, periodic processing, violation, and expire non compliance.

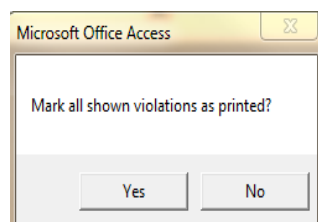
The Expired Non-Compliance screen will appear and you can view the list of violations in your system, including the Violation type, address, status, deadline, proposed fine and current due. If the days of the proposed deadline have passed and you run the Non-compliance procedure, the status will move to the next violation level and fine. When you are ready to continue select [Expire Above Violations](#) and the printing violations screen will now appear.



Violation	Cited Address	Status	Deadline	Proposed Fine	Current Due
60002 - Junk in Yard	3608 TOLENA RD	1st Notice	04/18/07	\$0.00	\$0.00
60003 - Junk in Yard	8217 38th Ave N	1st Notice	04/21/08	\$0.00	\$0.00
60004 - Junk in Yard	8217 38th Ave N	1st Notice	01/14/09	\$25.00	\$0.00
60006 - Junk in Yard	8217 38th Ave N	1st Notice	05/25/09	\$25.00	\$0.00
60007 - Junk in Yard	8217 38th Ave N	1st Notice	09/29/09	\$25.00	\$0.00
60008 - Junk in Yard	8217 38th Ave N	1st Notice	11/17/09	\$25.00	\$0.00
60009 - Junk in Yard		1st Notice	12/28/09	\$25.00	\$0.00
60010 - Junk in Yard	8217 38th Ave N	1st Notice	12/28/09	\$25.00	\$0.00

Print Notices To:

This screen will show the changes from the expire routine and the new status and fines will show. From here you can also print the new notices by selecting where you want them printed and then click on the **Print Notice To** option. When you close out you will be asked to “mark all shown violations as printed” and say yes.



## ENTERING VIOLATION PAYMENT INTO RECEIPT BATCH

There are many ways to look up a violation to apply a payment. The first way is directly from the violation screen (view, inquiry, violation)

Next, in the search box type in the violation #, cited address, or name. If multiple violations appear, a selection box will show allowing you to choose which violation is being paid.

Search

Customer	Type of Violation
Olson, Chris	04/14/08 Junk in Yard
Olson, Chris	01/07/09 Junk in Yard
Olson, Chris	01/08/09 Junk in Yard
Olson, Chris	05/18/09 Junk in Yard
Olson, Chris	09/22/09 Junk in Yard
Olson, Chris	11/10/09 Junk in Yard
Olson, Chris	12/21/09 Junk in Yard
Olson, Chris	11/10/10 Junk in Yard
Olson, Chris	11/14/11 Junk in Yard
Olson, Chris	01/03/12 Junk in Yard

The additional way to search for a violation is to go to view, inquiry and then select owner, contractor, or property. From there use the same lookup and then click the violations tab. Next, click on the specific violation and click more info to display the actual violation.

In both cases, the next step once the violation screen is showing, is to click on the dollar amount **Balance Due**  to bring up a menu asking if you want to create a new batch or add the payment to an existing batch. If creating a new batch, then you will be prompted to enter in a batch name.

Enter Name of New Receipt Batch

11-DEC-23 - 12/23/2011

In the Entry Description, enter Property PIN, Utility Account No, Property Address, Customer Name (for same-owner property selection), Permit ID (preceded with P), License No. (with L), Citation No. (with C), or Assessment No. (with A). Use the \* and ? wildcard for partial search on Property Address or Name.

Entry Description	Amount	Check #	Remark	Customer
Permit B-11018 - Basement Finish	\$2,400.00	4456	123 6TH AVE E	ROGER HARRIS
	\$0.00			ROGER HARRIS

Record a check number if wanted and then simply close the screen down. All other payments that come in for the day can be put into the same batch and posted at the end of day.



## ENTERING RECEIPTS FROM THE BATCH SCREEN

Receipts can also be directly entered on the batch screen. Go to view, receipt entry, and either select a current batch to add to or create a new batch.

**\*\*Entering directly from the batch screen has an advantage when a customer wants to pay for multiple permits, licenses, violations, etc.**

The screenshot shows a software window titled "11-DEC-23 - 12/23/2011". It contains a form for entering receipt information. At the top, there are fields for "Entry Description", "Amount", "Check #", "Remark", and "Customer". Below these fields is a table with the following data:

Entry Description	Amount	Check #	Remark	Customer
Permit B-11018 - Basement Finish	\$2,400.00	4456	- 123 6TH AVE E	ROGER HARRIS
Permit B-11017 - Basement Finish	\$2,150.00		8217 38th Ave N	Olson, Chris
Junk in Yard	\$0.00		8217 38th Ave N	Olson, Chris

Below the table is a "Selection" dialog box. It has a "Selection" title bar and a list of items with columns for "Item Description", "Balance", and "Remarks". The list includes:

- Violation 60020 Snow Shoveling \$25.00 8217 38th Ave N
- License 11002 Business \$7.50 8217 38th Ave N
- License 54561 Liquor On Sale \$1,500.00 8217 38th Ave N
- License 54562 Liquor On Sale \$1,500.00 8217 38th Ave N
- License 54574 Business \$6.25 8217 38th Ave N
- Permit 91328 Building Permit \$1,250.00 8217 38th Ave N
- Permit B-09001 Basement Finish \$1,350.00 8217 38th Ave N
- Permit 91331 Building Permit \$145.00 8217 38th Ave N
- Permit B-09002 Basement Finish \$1,350.00 8217 38th Ave N
- Permit B-09003 Basement Finish \$1,350.00 8217 38th Ave N
- Permit B-09005 Basement Finish \$1,350.00 8217 38th Ave N
- Permit 91333 Building Permit \$150.00 8217 38th Ave N
- Permit B-09006 Basement Finish \$1,350.00 8217 38th Ave N

At the bottom of the dialog box, there is a checkbox labeled "Allow Multiple Selections" which is checked. There are also buttons for "Select All", "Unselect All", and "Continue".

In the entry description box you can type a property address, owner name, or contractor name and the selection screen will appear allowing you to choose multiple items to pay for.

**\*\*on the selection screen, make sure the "allow multiple selections" box is checked so you can click on multiple items.**

Once the items are selected to pay off, click on continue and individual line items will show up in the batch to show what is being paid.

**Receipting Options:** This allows you to choose what information is displayed by default in the entry description and remark. (Talked about on page 4 of setup)

**Other Receipt Entry Ways:** On this screen a receipt can also be entered by Permit #, License #, Citation #(violation#), etc. If entering a permit id you would enter P and then the #. Instructions are given at the top of the batch screen.

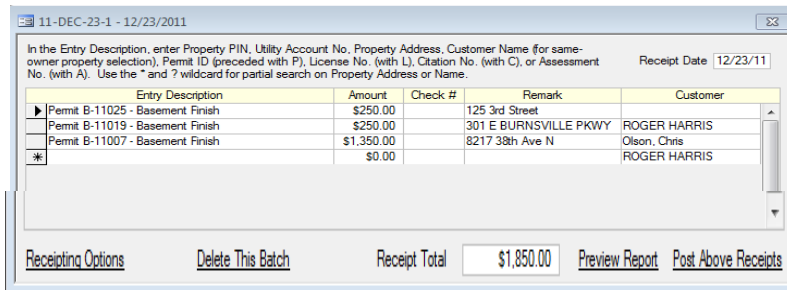
An \* can be used as a wild card for lookup. For example type in Olson\* and it will show all matches in the list to select from.

The screenshot shows a "Selection" dialog box with a list of "Matched Names" and "Address". The list includes:

Matched Names	Address
OLSON, BLAKE B & SHARON L	30056 SMALAND RD
OLSON, GERRY G/ETUX	9376 MAPLE CIRCLE NW
OLSON, JOHN V	9280 CO RD 34 NW
OLSON, ETHEL J/TRUSTEE	
OLSON, ROBERT L & LINDA K	925 CRYSTAL LAKE ROAD EAST
OLSON, MAYNARD R & ALAINE E	4877 CO RD 22 NW
Olson, Chris	8217 38th Ave N
Chris Olson	1403 N MC
Olson, Justin	101 W MAIN ST
Olson, Rachel	101 Main Street

## POSTING RECEIPT BATCHES

As permits, licenses, and violation receipts have been entered during the day they were put into a receipt batch. At the end of the day you will want to post the batch to get your receipt distribution detail.



11-DEC-23-1 - 12/23/2011

In the Entry Description, enter Property PIN, Utility Account No, Property Address, Customer Name (for same-owner property selection), Permit ID (preceded with P), License No. (with L), Citation No. (with C), or Assessment No. (with A). Use the \* and ? wildcard for partial search on Property Address or Name.

Receipt Date: 12/23/11

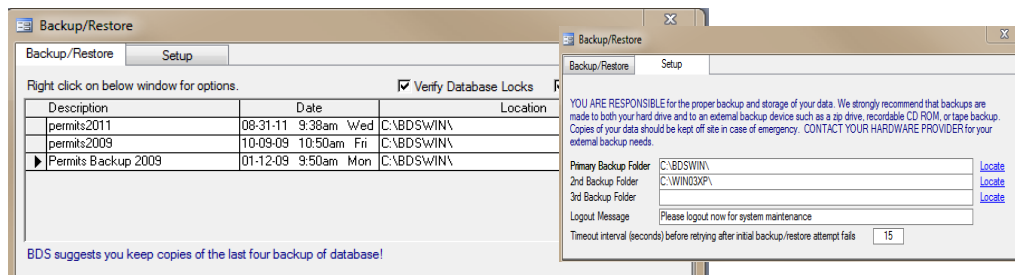
Entry Description	Amount	Check #	Remark	Customer
▶ Permit B-11025 - Basement Finish	\$250.00		125 3rd Street	
Permit B-11019 - Basement Finish	\$250.00		301 E BURNSVILLE PKWY	ROGER HARRIS
Permit B-11007 - Basement Finish	\$1,350.00		8217 38th Ave N	Olson, Chris
*	\$0.00			ROGER HARRIS

Receipting Options    Delete This Batch    Receipt Total    \$1,850.00    Preview Report    Post Above Receipts

To view your batch, click on view, receipt entry, and then click on your batch to display the batch screen.

The first step is to click on **PREVIEW REPORT** to verify or have a print out of the receipts entered. (This can be recalled again if you do not want to actually print, but simply review on screen)

Next click on **POST ABOVE RECEIPTS** and you will be prompted to make a backup.



Backup/Restore

Backup/Restore    Setup

Right click on below window for options.    ☒ Verify Database Locks

Description	Date	Time	Location	
permits2011	08-31-11	9:38am	Wed	C:\BDSWIN\
permits2009	10-09-09	10:50am	Fri	C:\BDSWIN\
▶ Permits Backup 2009	01-12-09	9:50am	Mon	C:\BDSWIN\

BDS suggests you keep copies of the last four backup of database!

YOU ARE RESPONSIBLE for the proper backup and storage of your data. We strongly recommend that backups are made to both your hard drive and to an external backup device such as a zip drive, recordable CD ROM, or tape backup. Copies of your data should be kept off site in case of emergency. CONTACT YOUR HARDWARE PROVIDER for your external backup needs.

Primary Backup Folder: C:\BDSWIN\    Locate

2nd Backup Folder: C:\WIN32XP\    Locate

3rd Backup Folder:    Locate

Logout Message: Please logout now for system maintenance

Timeout interval (seconds) before retrying after initial backup/restore attempt fails: 15

On the setup tab click on the locate option to browse where you want the backups stored. Typically they would be stored on a network drive. You can also locate multiple backup options to rotate where you backup to. (contact Banyon for setup help)

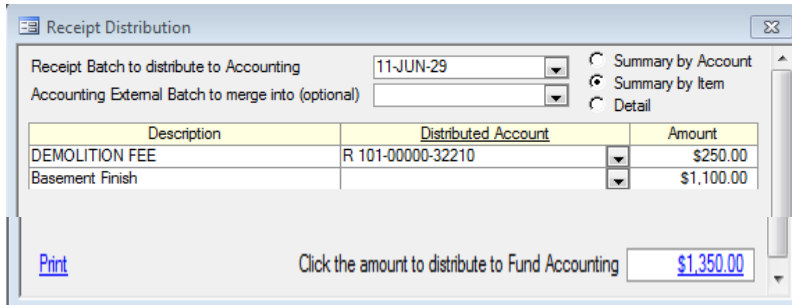
To start a backup you need to be on the Backup/Restore tab and right click under the **DESCRIPTION** column and select create new backup. If you setup multiple backup locations on the setup tab you will have the option to "create backup in" and then select the location.

You will then be prompted to enter a backup name which might be something like permits122311 for the date. Once a name is entered press ok and you will get a verification message if it backs up successfully. Say ok to the message and you will be brought back to the backup/restore screen and that can be closed as well. (your backup should also now be listed)

Once the backup screen is closed a **"continue posting message"** will appear and say **yes** to conclude the posting process.

## RECEIPT DISTRIBUTION

To view receipt distribution or transfer revenue to BDS Accounting, go to view, receipt entry, and receipt distribution.



The Receipt Distribution window shows a table with two rows of data. The first row is 'DEMOLITION FEE' with a distributed account of 'R 101-00000-32210' and an amount of '\$250.00'. The second row is 'Basement Finish' with the same distributed account and an amount of '\$1,100.00'. The total amount to be distributed is '\$1,350.00'.

Description	Distributed Account	Amount
DEMOLITION FEE	R 101-00000-32210	\$250.00
Basement Finish		\$1,100.00

Click the amount to distribute to Fund Accounting **\$1,350.00**

On the receipt distribution screen the latest posted batch will be displayed. The radio buttons on the side give you the option to print or distribute by a summary to account, summary by item, or detailed.

To send over to Banyon Fund Accounting, simply choose your radio button option and then click on the dollar amount and then enter a batch name. (It can also be renamed once it gets to Fund Accounting)

Enter Accounting Batch Name

11-DEC-23

If you do not have BDS Fund Accounting, choose a radio button option and then print your report and give to your accounting department.

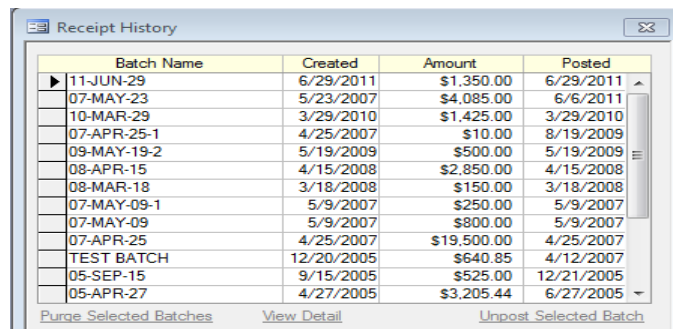
***\*A complete batch history is available. So, if something needs to be reprinted or resent to Banyon Accounting you can do it from here. Simply select the batch from the drop down.***

## UNPOSTING A RECEIPT BATCH

To un-post a receipt batch select view, receipt entry, and receipt history. Next, click on the batch to un-post and then click **Unpost Selected Batch**

The un-posted batch can now be accessed by going to view & selecting receipts.

If the batch was already sent to Banyon Fund Accounting it can be deleted in Fund Before it is posted.



The Receipt History window displays a table of receipt batches. The table has four columns: Batch Name, Created, Amount, and Posted. The first row is selected, showing '11-JUN-29' created on 6/29/2011 for an amount of \$1,350.00, posted on 6/29/2011.

Batch Name	Created	Amount	Posted
11-JUN-29	6/29/2011	\$1,350.00	6/29/2011
07-MAY-23	5/23/2007	\$4,085.00	6/6/2011
10-MAR-29	3/29/2010	\$1,425.00	3/29/2010
07-APR-25-1	4/25/2007	\$10.00	8/19/2009
09-MAY-19-2	5/19/2009	\$500.00	5/19/2009
08-APR-15	4/15/2008	\$2,850.00	4/15/2008
08-MAR-18	3/18/2008	\$150.00	3/18/2008
07-MAY-09-1	5/9/2007	\$250.00	5/9/2007
07-MAY-09	5/9/2007	\$800.00	5/9/2007
07-APR-25	4/25/2007	\$19,500.00	4/25/2007
TEST BATCH	12/20/2005	\$640.85	4/12/2007
05-SEP-15	9/15/2005	\$525.00	12/21/2005
05-APR-27	4/27/2005	\$3,205.44	6/27/2005

Purge Selected Batches View Detail Unpost Selected Batch

If the batch was already posted into Banyon Fund Accounting then it will also need to be reversed.