

Banyon Data Systems  
**PROPERTY MANAGEMENT USERS GUIDE**  
**Permits Module**

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By

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## INTRODUCTION TO THE PERMITS SOFTWARE

The BDS Permits software will help you create, issue, and organize the task associated with permits.

The Permit software will allow you to:

- Add New Permits
- Track existing Permits
- Calculate Fees
- Track Owner, Contractor and Tenant information
- Print Permits specifically designed for your entity.

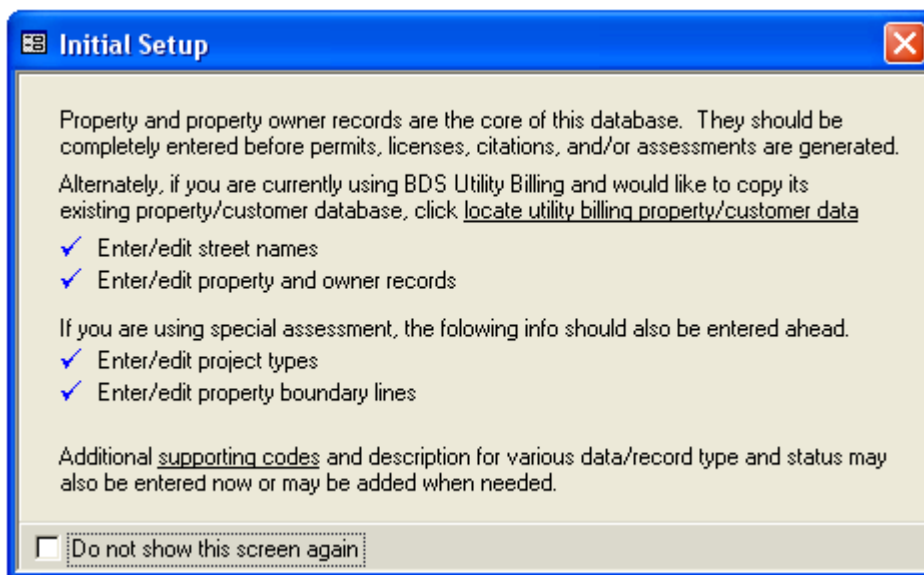
This user guide is a general “how-to” for Banyon Data Systems Special Assessment software. Training is encouraged to enhance the learning process for this product. Please refer to the BDS Read Me First Guide for passwords and Backup/Restore procedures.

## PROPERTY AND CUSTOMER SETUP

BDS Property Management is a MODULE BUILDING data collection system capable of managing your **PERMITS**.

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

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



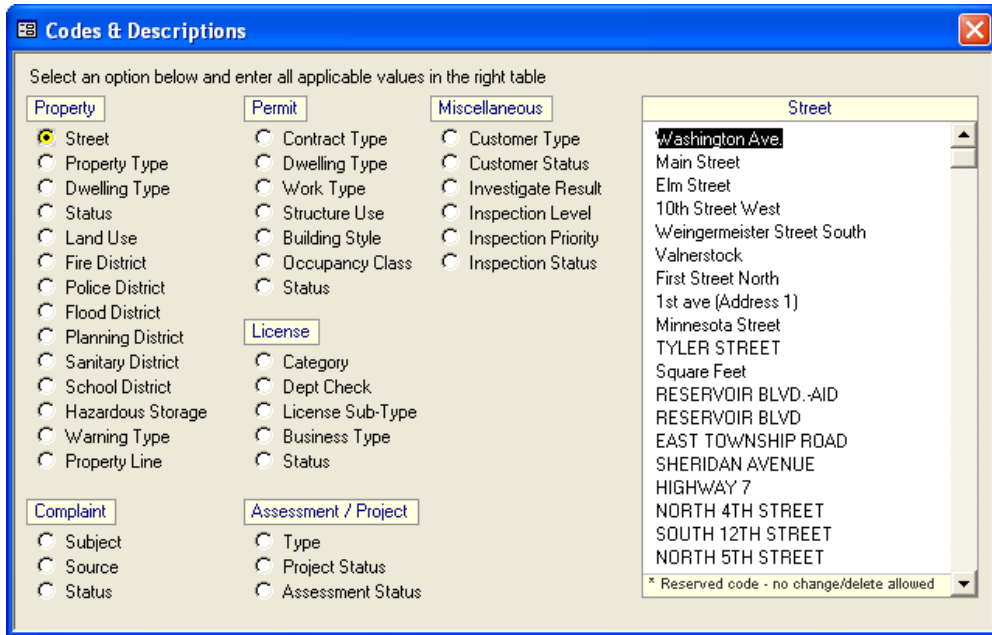
The four items shown above with blue check marks (indicating complete or in progress) are crucial and work as the base for the rest of the data growth.

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

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

## Setup Codes and Descriptions

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



The screenshot shows a window titled "Codes & Descriptions" with a close button in the top right corner. The window contains a list of categories on the left and a list of street names on the right. The categories are: Property, Permit, Miscellaneous, License, Complaint, and Assessment / Project. The street names are listed in a scrollable area on the right, with "Washington Ave." selected. A note at the bottom of the scrollable area reads: "\* Reserved code - no change/delete allowed".

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

Property	Permit	Miscellaneous	Street
<input checked="" type="radio"/> Street	<input type="radio"/> Contract Type	<input type="radio"/> Customer Type	Washington Ave.
<input type="radio"/> Property Type	<input type="radio"/> Dwelling Type	<input type="radio"/> Customer Status	Main Street
<input type="radio"/> Dwelling Type	<input type="radio"/> Work Type	<input type="radio"/> Investigate Result	Elm Street
<input type="radio"/> Status	<input type="radio"/> Structure Use	<input type="radio"/> Inspection Level	10th Street West
<input type="radio"/> Land Use	<input type="radio"/> Building Style	<input type="radio"/> Inspection Priority	Weingermeister Street South
<input type="radio"/> Fire District	<input type="radio"/> Occupancy Class	<input type="radio"/> Inspection Status	Valnerstock
<input type="radio"/> Police District	<input type="radio"/> Status		First Street North
<input type="radio"/> Flood District			1st ave (Address 1)
<input type="radio"/> Planning District	<b>License</b>		Minnesota Street
<input type="radio"/> Sanitary District	<input type="radio"/> Category		TYLER STREET
<input type="radio"/> School District	<input type="radio"/> Dept Check		Square Feet
<input type="radio"/> Hazardous Storage	<input type="radio"/> License Sub-Type		RESERVOIR BLVD -AID
<input type="radio"/> Warning Type	<input type="radio"/> Business Type		RESERVOIR BLVD
<input type="radio"/> Property Line	<input type="radio"/> Status		EAST TOWNSHIP ROAD
<b>Complaint</b>	<b>Assessment / Project</b>		SHERIDAN AVENUE
<input type="radio"/> Subject	<input type="radio"/> Type		HIGHWAY 7
<input type="radio"/> Source	<input type="radio"/> Project Status		NORTH 4TH STREET
<input type="radio"/> Status	<input type="radio"/> Assessment Status		SOUTH 12TH STREET
			NORTH 5TH STREET

\* Reserved code - no change/delete allowed

Setup of Codes and Descriptions is a collection of valid data items to be used in property records and permits.

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

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

## Property 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 the main menu. That is to click View, Inquiry, and then Property.

Search\* 2902 Status Regular  Exempt from Admin Fee

House/Street 2109 WILLIAM AVENUE Apt/Desc PIN 701910415

Full Address 2109 WILLIAM AVENUE Note

Montevideo MN 56265

Legal Zoning Customer Assessment Permit License Complaint Utility Billing Misc.

Party of Interest (Owner, Mortgage, County) Attention %CITY OF MONTEVIDEO

\*MONTEVIDEO EDIA Address P O BOX 676 MONTEVIDEO MN 56265

Home Phone  Primary Owner

Work Phone  Contract Purchaser

Fax Number  Fee Purchaser

E-Mail  Assessment Notice Recipient

Assessment Bill Recipient


Attach New Party Detach Selected Party Create New Customer More Information

Search Form Report Property Info Options

Add New Property

Enter Full Property Address: 2314 Broadway Avenue #31

It is easier to first create the property record then the owners than vice versa.

To create a new property, click on the button. 

The system will ask for the full property address. Enter the address using the format as shown: House Number, Street Name, Street type, Direction, 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.

If you are on the Customer tab and wish to create the Customer/owner record for this property, click Create New Customer/owner. If you would like to attach an existing owner or additional owner, click to Attach. To remove an attached Customer, select the owner on the list and click Remove Selected Customer.

To **lookup a property record**, use the lookup cell to enter key property or customer information including a Property ID field, PIN, property address, or owners 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.

**PROPERTY INQUIRY SCREEN**

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

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

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

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

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

**Building tab**- attach a floor plan, values of building and land, sale prices, size, year built, bedrooms, baths & more!

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

Legal	Zoning	Customer	Assessment	Permit	License	Complaint	Utility Billing	Misc.	
Party of Interest (Owner, Mortgagee, County)		Attention							
*MONTEVIDEO EDA		Address		211 NORTH 10TH STREET MONTEVIDEO MN 56265					
AANERUD, RICHARD R & LAURA A		Home Phone		<input type="checkbox"/> Primary Owner					
		Work Phone		<input type="checkbox"/> Contract Purchaser					
		Fax Number		<input type="checkbox"/> Fee Purchaser					
		E-Mail		<input checked="" type="checkbox"/> Assessment Notice Recipient					
				<input checked="" type="checkbox"/> Assessment Bill Recipient					
<a href="#">Attach New Party</a>		<a href="#">Detach Selected Party</a>		<a href="#">Create New Customer</a>		<a href="#">More Information</a>			

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

<input checked="" type="checkbox"/>	Primary Owner
<input type="checkbox"/>	Contract Purchaser
<input checked="" type="checkbox"/>	Fee Purchaser
<input checked="" type="checkbox"/>	Assessment Notice Recipient
<input checked="" type="checkbox"/>	Assessment Bill Recipient

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

Since the module has been purchased by your organization, the **Permit tab** contains all permits for this property. To know more on a particular permit, click on it to bring up the menu (as shown). To apply for a new permit for this property, click on [New Permit](#).

Legal	Zoning	Owner	Assessment	Permit	License	Complaint	Property Tax	Utility Billing	Misc.
Permit		Status	Issued	Balance	Apply Date		08/09/99		
▶ Building Permitt		Issued	08/09/99	\$0.00	Issue Date		08/09/99		
Specific					Start Date		08/09/99		
Property					Last Inspected				
Owner					Project Begin		08/09/99		
Tenant					Project Complete				
Contractor					Expire Date		02/05/00		
Architect					More Info		<a href="#">New Permit</a>		
Fee									
Inspection									



This is what the property information looks like. If you have a picture of the property, you may show that in the upper right hand corner of the screen.

To attach a picture with a property, click on the box and browse your files until you find the correct picture.  
**NOTE: The picture must be saved in .jpg or .bmp format.**

Property

Search\* 1199  
House/Street 405 - 407 BROADWAY  
Apt/Desc  
YOUR CITY US 55555-5555  
Owner ANDERSON, PAUL H/TRUST  
PIN 63-1034-000

Status Regular Exempt from Admin Fee

Note PROPERTY LOCATED ON GOLDEN POND. UTILITY EASEMENTS ON NORTH AND SOUTH PROPLINE.

Legal Zoning Customer Assessment Permit License Complaint Property Tax Utility Billing Misc.

Permit	Status	Issued	Balance
Burning Permit	Approved	09/13/05	\$0.00
Building Permit	Pending		\$150.00
Sign Permit	Approved		\$0.00
Burning Permit	Issued	12/20/05	\$0.00

Permit # 91305  
Apply Date 09/13/05  
Issue Date 09/13/05  
Start Date 09/25/05  
Last Inspected  
Project Begin 09/25/05  
Project Complete 09/26/05  
Expire Date 09/26/05

More Info New Permit

Delete Property Create Assessment Certificate Report Property Info Options

Once the picture is attached to the property, you may click on the picture to get a closer look at the property.

## CUSTOMER INQUIRY SCREEN

The customer database contains data records for property owners, permit and license holders, and contracting companies.

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

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

The bottom half of the customer screen has additional information pertained to the displayed customer record.

The **Personal tab** is especially applicable to contractors and license holders.

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

Owned Properties	
2652	420 LYNSEE LANE
2495	551 1ST STREET SW

Other Party of Interest on Selected Property
LEENTHROP FARMERS MUTUAL

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

Personal	Property	Permit	License	Contractor	Assessment	Utility Billing	Property Tax
		Permit	Status	Issued	Balance	Apply Date	08/31/98
		▶ Building Permit	Issued	08/31/98	\$0.00	Issue Date	08/31/98
		Residential heating, a/c & vent	Issued	08/16/99	\$0.00	Start Date	08/31/98
						Last Inspected	
						Project Begin	
						Project Complete	
						Expire Date	02/28/99
						More Info	New Permit

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

Personal	Property	Permit	License	Contractor	Assessment	Utility Billing	Property Tax
		Contractor Name		Contract Type	Expire	Tax ID	
		▶ Aaron Oquist Roofing		Roofing Contract	12/31/05	State License No	
		<ul style="list-style-type: none"> <li>▶ Agent</li> <li><b>License</b></li> <li>▶ Permit</li> <li>▶ Contact</li> <li>Complaint</li> </ul>				Business License No	1998-99
						Insurance	
						Phone	
						Vehicle Expires	
						Workers Comp Expires	
						Bond Expires	12/10/99
						Liability Expires	09/03/99
						More Info	

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

Personal	Property	Permit	License	Contractor	Assessment	Utility Billing	Property Tax
		Property Address		Project Name	Status	Principal	Amount Due
		4117 2ND ST		SW QUADRANT		\$0.00	\$0.00
		4117 2ND ST		SW 1/4,37-44,MAIN-CENTRAL		\$156.80	\$0.00
		4117 2ND ST		37-42,MAIN-CENTRAL & 44,UNIV-C		\$0.00	\$0.00
		4252 MONROE ST		SW QUADRANT		\$0.00	\$0.00
		▶ 4252 MONROE ST		CITY WIDE HAZARDOUS SIDEWA		\$0.00	\$0.00
		4252 MONROE ST		BITUMINOUS ALLEYS		\$53.60	\$0.00
		4252 MONROE ST		SW 1/4,37-44,MAIN-CENTRAL		\$89.60	\$0.00
		4252 MONROE ST		ALLEYS OVER 8 YEARS OLD		\$64.00	\$0.00
						\$364.00	\$0.00
		<a href="#">More On Assessment</a>		<a href="#">More On Project</a>			

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

Personal	Property	Permit	License	Contractor	Assessment	Utility Billing	Property Tax	
		Account No.	Status	Date Due	Amount	Service	Status	Amount
		▶ 01-00000558-00	Active		\$138.76	WATER		\$12.25
		01-00003241-00	Active		\$174.70	SEWER		\$30.74
						REFUSE		\$2.00
						ELECTRIC		\$56.20
						WTR TEST FEE		\$0.88
						FUEL ADJ CHG		\$3.90
					\$313.46			

## CONTRACTOR INQUIRY SCREEN

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

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

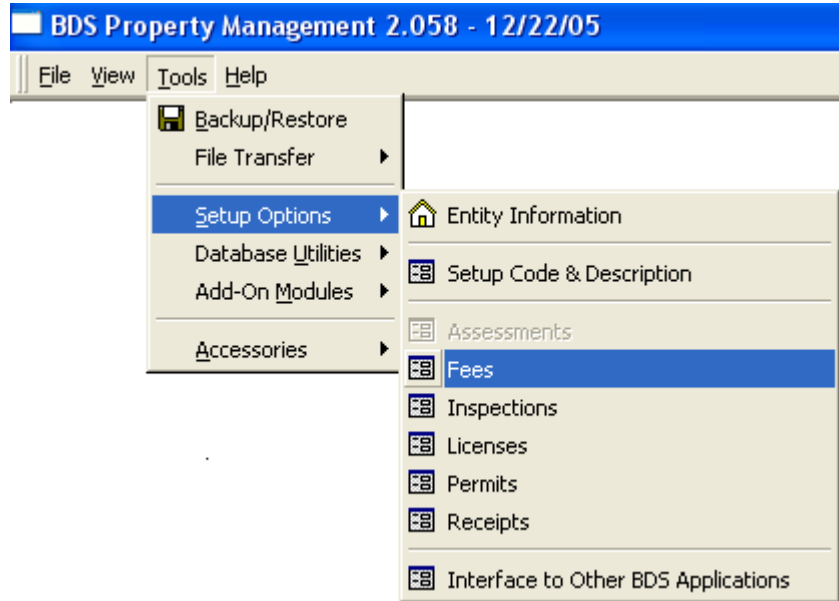
The **Permit tab** lists permits pulled by the contractor.

**Complaint tab** on the contractor screen may be used to log complaints or issues about the contractor.

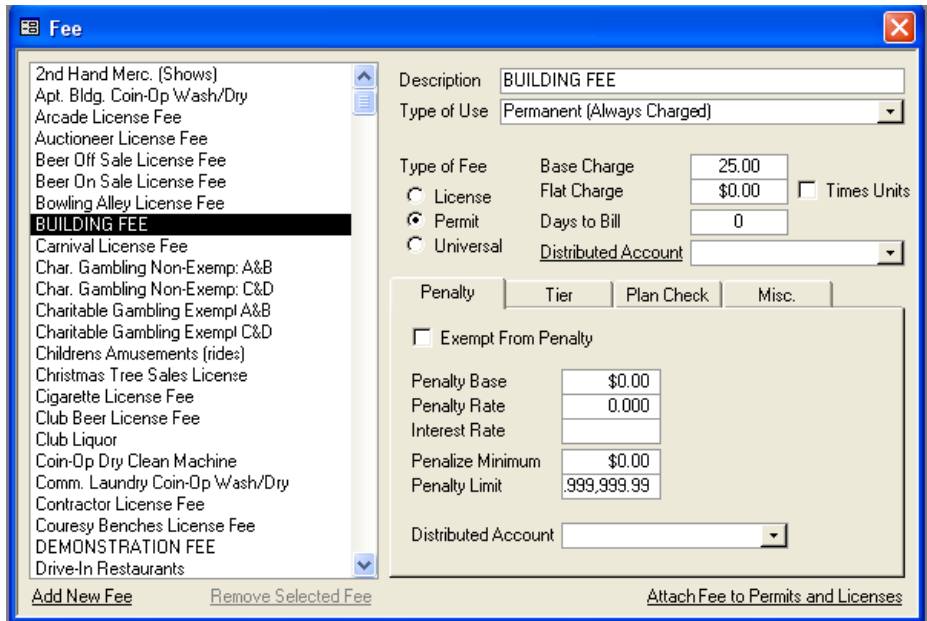
The screenshot shows a software window titled "Contractor" with a blue border and a close button in the top right corner. The window contains several input fields and dropdown menus. At the top, there is a dropdown for "ID\*" with the value "90900". Below this are fields for "Name" (S & S Tree & Hort. Specialists), "Contract Type" (Tree Services), "Tax ID" (3084398), "State Lic#" (2000), "Bus. Lic#" (2000), "Exp." (empty), "Vehicle Expire", "Workers Comp Expire" (09/30/00), "Bond Expire", and "Liability Expire" (09/30/00). There are also fields for "Insurance", "Policy #", and "Phone". Below these fields is a tabbed interface with tabs for "Contact", "Agent", "License", "Permit", "Complaint", and "Misc". The "Contact" tab is active, showing fields for "Name" (S & S Tree & Hort. Specialists), "Attention" (Steven Sylvester), "Address" (6214 Concord Blvd., Inver Grove Heights MN 55076), "Country" (empty), "Tax ID", "DP Code", "Carrier Route", "Home Phone" (612)451-8907, "Work Phone", "Fax Number", and "E-Mail". A "More Info" link is visible below the "Country" field. At the bottom of the window, there is a navigation bar with several icons and a close button.

## HOW TO GET STARTED

Before you can issue permits, you will need to set up the fees that will be associated with the permits. Click on Tools, select Setup Options, and Fees



All the fees that will be charged for permits must be created. Same sample fees are included with the software, but you will need to customize those to your needs. Later, permits will have these fees attached to them to show what will be charged for the specific permit type. Then when a permit of that type is issued, the fees you attached will be charged on the permit.



## **ADD A NEW FEE TYPE**

On the Fee screen, in the bottom left hand corner you will click on Add New Fee.

After you click on Add New Fee, an Enter Description box will pop up. Enter the name of the fee you are creating here.

A screenshot of a dialog box with a blue background. On the left side, the text "Enter Description" is written in white. To the right of this text is a white rectangular input field for entering text.

Now you will notice that the fee name you have just entered is added to the list of existing fees.

This is the fee screen. You will enter all information pertaining to the specified fee on this screen.

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

- 1) Permanent (Always Charged)
- 2) First Time (Charge only when permit is issued)
- 3) Renewal (Charged only when permits are renewed)

**Type of Fee:** This is the type of fee. There are three valid fee types.

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

**Base Charge –** A dollar amount added in after all other calculations have taken place. This is a flat fee, which is not involved in any other calculations.

**Flat Charge -** A flat dollar amount to be charged, which can optionally be multiplied by the number of units on the permit.

**Times Units -** If checked, the Flat Charge is multiplied by the number of units field on the permit.

**Days to Bill -** This is how many days you'd like the permit to be charged.

**Distributed Account -** Click on this to choose the BDS Fund Accounting Account Code that this charge would be applied to.

## PENALTY TAB ON FEE SCREEN

Penalty	Tier	Plan Check	Misc.
<input type="checkbox"/> 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			

- Exempt From Penalty -** Check this box if this permit fee is always exempt from receiving penalty charges.
- Penalty Base -** This is a flat amount to charge for a penalty (if any) that applies to this fee.
- Penalty Rate -** This is a percentage of the total fee amount to charge as a penalty when penalties are calculated.
- Interest Rate -** This is the rate of interest you would like calculated on this permit fee.
- Penalize Minimum -** If this fee owes less than this minimum amount, no penalty would be applied. This saves you from applying a ten dollar penalty if there is only fifty cents due for a license.
- Penalty Limit -** If a calculated penalty is more than this amount, then the penalty is reduces to this amount.
- Distributed Account -** Click on this to choose the BDS Fund Accounting Account Code that this charge would be applied to.



## TIER TAB ON FEE SCREEN

Penalty	Tier	Plan Check	Misc.
Tier Is Based On <input checked="" type="radio"/> Units <input type="radio"/> Estimated Cost of Work			
Units Are For <input type="text" value="Normal Units of The License"/>			
Tier	Amount	Per	Rate
▶ First	1.00	\$50.00	1 0.000000
Over		\$10.00	1 0.000000
*		\$0.00	0 0.000000

**Tier is Based On - Units,** This line sets up a basis for the tiers shown below. If you select **Units**, the tier is based on one of the unit fields, depending on how you set up the **Units are for** field.

If you select **Estimated Cost of Work**, then the tier is based on the Estimated Cost of Work for this permit fee.

**Units are for -** Used only when the tier is based on **UNITS**. Determines if the tier is based on:

- 1) Normal Units of the license
- 2) Plumbing Units Group A
- 3) Plumbing Units Group B
- 4) Plumbing Units Group C

**Tier Charges -** It is optional to use Tiered Charges.

The Tiered Charges allows you to charge different amounts based on the estimated cost of the permit, or a number of units. This allows a great deal of flexibility in calculating fees.

## EACH TIER LINE

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.

## EXAMPLE

		<b>Amount</b>	<b>Per</b>	<b>Percent</b>
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 ON FEE SCREEN

Penalty	Tier	Plan Check	Misc.
Residential Plan Check Rate			
Commercial Plan Check Rate			
Minimum to Apply Plan Check			

### **Residential Plan Check Rate (Optional)**

This is a percentage of the Fee amount of the permit to charge for a plan residential check fee. This is normally only charged on a building permit.

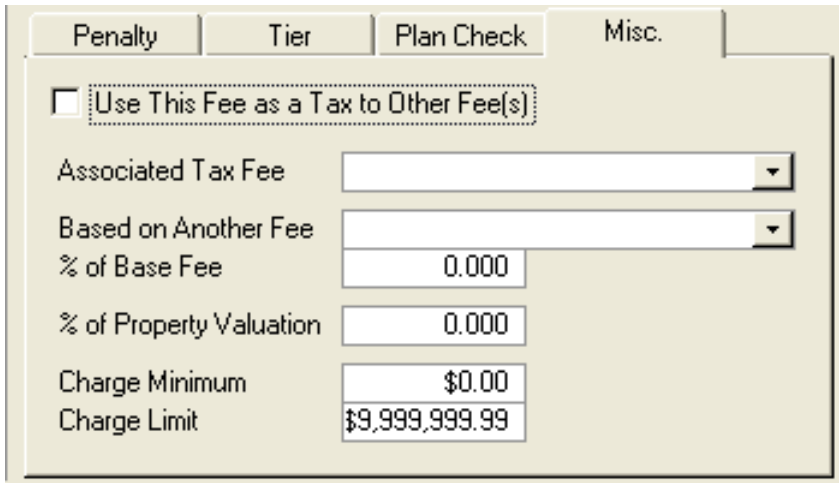
### **Commercial Plan Check Rate (Optional)**

This is the percentage of the Fee amount of the permit to charge for a commercial plan check fee. This is normally only charged on a building permit.

### **Minimum to Apply Plan Check (Optional)**

The amount of the fee must be more than this dollar amount for the plan check fee to be applied.

## MISC TAB ON FEE SCREEN



Penalty	Tier	Plan Check	Misc.
<input type="checkbox"/> Use This Fee as a Tax to Other Fee(s)			
Associated Tax Fee		[Dropdown]	
Based on Another Fee		[Dropdown]	
% of Base Fee		0.000	
% of Property Valuation		0.000	
Charge Minimum		\$0.00	
Charge Limit		\$9,999,999.99	

### 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.

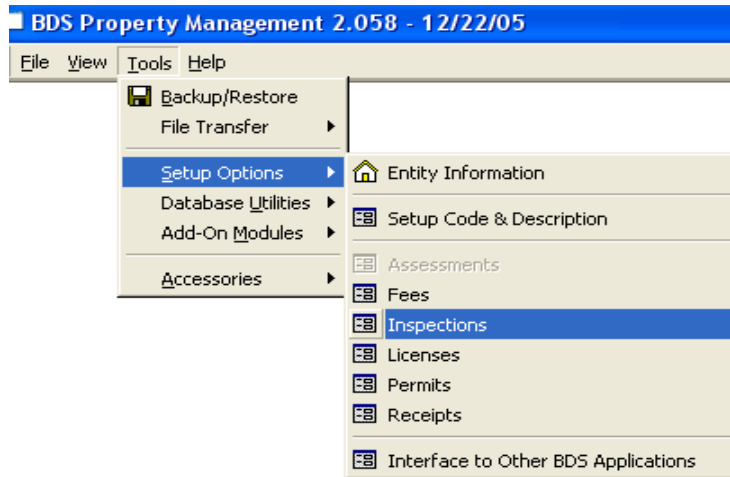
### Based on Another Fee -

Use the drop down to select a fee on which this fee will be based upon.

After you have created all the fees for the permits, you will now setup inspections.

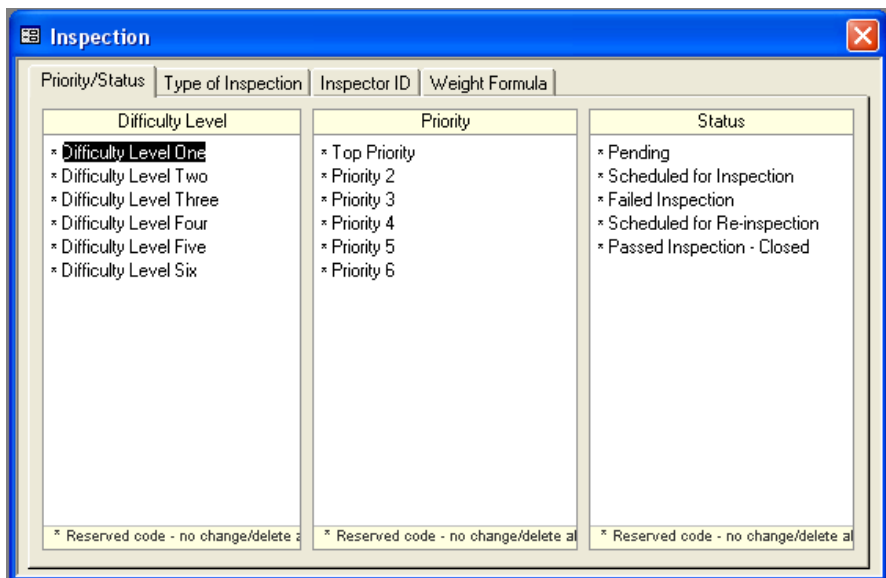
## INSPECTION SETUP

To set up your inspections, Select Tools, Setup Options, and then Inspections.



## PRIORITY/STATUS TAB

The **Priority/Status tab** is shown here. 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 different options that will come up when you're in the inspection screen.



## TYPE OF INSPECTION TAB

Next is the [Type of Inspection tab](#). Here you will choose the options for your inspections. 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 [memo area](#) 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.

Inspection Type	Level	Priority	Duration
▶ Building Inspections	Difficulty Level Three	Top Priority	30 min
Electrical Inspection	Difficulty Level Two	Priority 2	30 min
Plumbing Inspection	Difficulty Level Three	Priority 3	30 min
*			

MEMO

## INSPECTOR ID 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 specify which each inspector is qualified for.

For each inspector select one or more associated types of inspection

Inspector Initial and Name	Start Date	Type of Inspection
▶ HOLLY Holly Daze		Building Inspections
MINDY Mindy Fresh		Electrical Inspection
TINA Tina Smith		Plumbing Inspection
*		

## WEIGHT FORMULA TAB

The **weight formula tab** is used to correctly schedule the individuals that are able to perform each task.

### Manual Selection:

Allows you to choose which inspector you want to use for the permit.

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

The screenshot shows a software window titled "Inspection" with a blue header bar. Below the header is a tabbed interface with four tabs: "Priority/Status", "Type of Inspection", "Inspector ID", and "Weight Formula". The "Weight Formula" tab is active. It contains two sections: "Saturation" and "Weight".

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

- On Scheduled Date Only
- Between Todays Date and Scheduled Date
- Within Next  Days From Todays Date

**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
- Least Saturation
- Least Average Weight:  $[\text{Past Inspection Hours}] * [\text{Difficulty Level}] / [365 \text{ Days}]$
- Custom Defined Formula (Available Fields: Duration, Difficulty, Priority, Inspection Date)

Below the "Custom Defined Formula" option is an empty text input field.

Now that you have your fees and inspections setup, we will move on to creating a permit

## CREATING PERMITS

By clicking on [New Permit](#) in the bottom left hand corner of the screen, you will be able to add a new permit. The Enter Description box will pop up again, like in fees, this is where you will name the permit.

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

The screenshot shows a software window titled "Permit Type". On the left is a list of permit types, with "Building Permit" selected. On the right, there are several input fields and a memo area. The "Description" field contains "Building Permit" and "System Reserved". Below it are two dropdown menus for "Days Expired from Original Date" (set to 180) and "Days Expired from Previous Expiration". There is a text field for "Unit Name by Which Permit is Charged" containing "units" and a text field for "Valuation per Square Foot of Property" containing "10". A checkbox labeled "Minimum Job Value is based on Square Foot Value" is present and unchecked. Below these fields is a large "MEMO" area. At the bottom of the window, there are two tables: "Attached Fees" and "Attached Inspections".

Attached Fees	Setup	Attached Inspections	Setup
BUILDING FEE		Building Inspections	
Sales Tax		Electrical Inspection	
State Surcharge		Plumbing Inspection	

At the bottom of the window, there are three buttons: "New Permit", "Remove Selected", and "Show all available fees and inspections for selection".

## ATTACHING FEES AND INSPECTIONS

To attach fees and inspections, click on [Show all available fees and inspections for selection](#), which is found in the bottom right hand corner of the Permit Type screen. In the two boxes, lists of fees and inspections that you have created, will now appear. Click on the fee and inspection names to add them to the chosen permit.



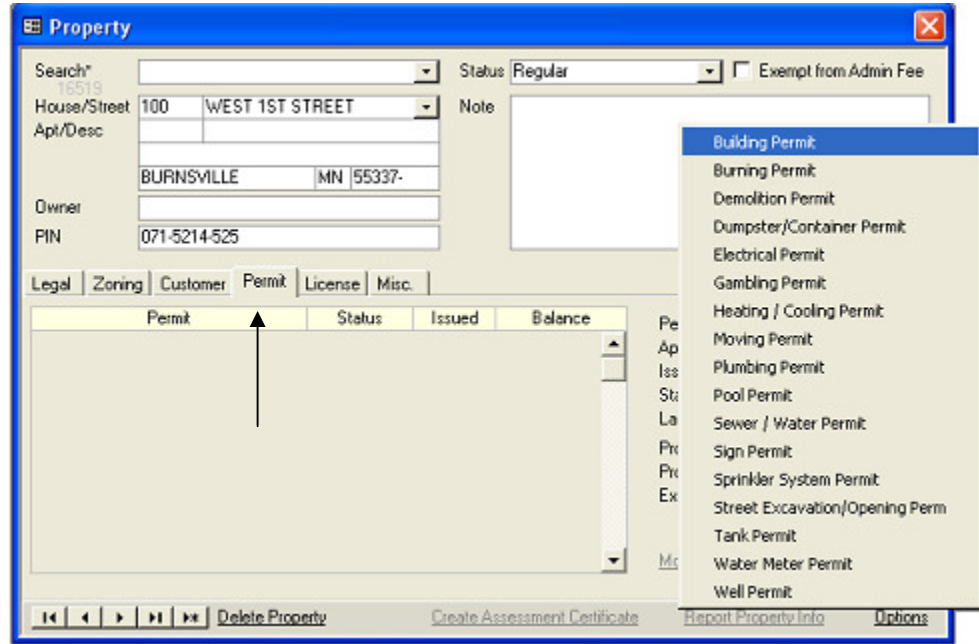
## ATTACHING PERMITS TO PROPERTIES

Now that you have created fees, inspections and permits, you are ready to attach them to properties.

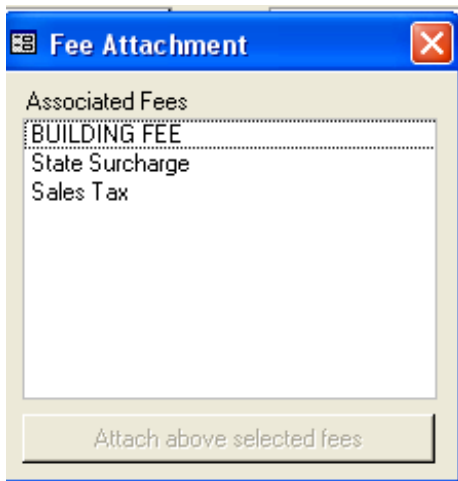
To do this, go to the upper left corner and select View, next choose Inquiry, and then Property.

Use the Search\* to locate the property that

you are creating a permit for. Then, choose the Permit tab on the Property screen. A menu of created permits will come up and you will choose the permit type here.



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 choose your own.



After you have assigned a number to the permit another window will come up with the fees that are associated with this permit type. You can select all of them or choose only the ones you'd like to charge with this permit. Then, click on Attach above selected fees.

Now, the permit screen has been created for you.

Shown here is the property tab on the permit. This will show all permits that are associated with this property. It also shows the status and balance information on the permits.

The screenshot shows the 'Permit# 91312' window with the 'Property' tab selected. The interface includes search fields, permit details, and a table of associated permits.

Permit*	Status	Balance
Burning Permit	Pending	\$25.00

Additional information visible in the screenshot includes:
 

- Search\*: [Empty]
- Street Address: 1201 ASHMORE AVENUE
- Permit Type: Burning Permit
- Status: Pending
- Project ID: [Empty]
- Applicant: Owner
- Estimate Cost: \$0.00
- Total Fees: \$25.00
- Total Paid: \$0.00
- Balance: \$25.00
- Apply Date: [Empty]
- Issue Date: [Empty]
- Start Date: [Empty]
- Last Activity: [Empty]
- Project Begin: [Empty]
- Project Ending: [Empty]
- Expire Date: 06/20/06

The screenshot shows the 'Permit# 91312' window with the 'Owner' tab selected. The interface displays owner information and contact details.

If applicant is an owner, select one from below list

- DOE, JOHN

Attention: [Empty]  
 Address: 1403 N MC YOUR CITY MN 58999-1234  
 Home Phone: [Empty]  
 Work Phone: [Empty]

More Information

After you have attached all permits to the property, you can add owner information on the Owner tab on the permit.

**Permit# 91312**

Search\*  Status  Apply Date

Street Address  Project ID  Issue Date

Permit Type  Applicant  Start Date

Work Class  Estimate Cost  Last Activity

Structure Type  Total Fees  Project Begin

Structure Use  Total Paid  Project Ending

Pro-rate Factor  Balance  Expire Date

Specific Property Owner Tenant Contractor Architect Fee Inspection

Fee	Amount	Penalty	Total Paid	Due Date	New Fee
▶ BUILDING FEE	\$25.00	\$0.00	\$0.00	12/22/05	Remove Fee

Balance

Receipt Date	Amount	Check #	Remark

You can also check on fees that are associated with this permit on the Fees tab. You can create a new fee by clicking on [New Fee](#). You can also remove a fee from this permit by selecting [Remove Fee](#). Once you have posted receipts to this permit, a history of receipts will be shown.

## Printing the Permit

If you would like to print the permit after it is created, set the status to issued and then click on the print permit option.

To print a different permit #, call up the permit you wish to print out by clicking on [View](#) at the top left corner of the screen. Next, choose [Inquiry](#) and [Permit](#). Use the search function to select the property in which the permit is attached to. In order for the permit to print, the status on the permit needs to be issued.

A receipt bar code can also be printed on the permit and then it can be scanned into a receipt batch or through the BDS Point of Sale Software.

Shown on the next page is a sample permit:

# TEST DATA

1717 E. PARK ST • YOUR CITY, MN 54241 • 920-793-5532

Permit Type: Building Permit  
Parcel No.: 70-818-3080  
Work Valuation: \$50,000.00

Permit No.: **155**  
Issued Date: 4/18/2006  
Expiration Date: 10/15/2006

## Owner Information

COLLINS, MICHAEL J  
504 SOUTH 7TH STREET  
MONTEVIDEO MN 56265

## Contractor Information

Olson Construction  
101 W Burnsville Parkway  
Burnsville MN 55337

## Work Description

## Fee Description

BUILDING FEE	\$621.75
State Surcharge	\$25.00
Sales Tax	\$0.00
GRAND TOTAL:	\$646.75

582 1ST STREET SW

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

**Permit# 91312**

Search*	<input type="text"/>	Status	Pending	Apply Date	<input type="text"/>
Street Address	1201 ASHMORE AVENUE	Project ID	<input type="text"/>	Issue Date	<input type="text"/>
Permit Type	Burning Permit	Applicant	Owner	Start Date	<input type="text"/>
Work Class	<input type="text"/>	Estimate Cost	\$0.00	Last Activity	<input type="text"/>
Structure Type	<input type="text"/>	Total Fees	\$25.00	Project Begin	<input type="text"/>
Structure Use	<input type="text"/>	Total Paid	\$0.00	Project Ending	<input type="text"/>
Pro-rate Factor	<input type="text"/>	Balance	\$25.00	Expire Date	06/20/06

Specific	Property	Owner	Tenant	Contractor	Architect	Fee	Inspection
----------	----------	-------	--------	------------	-----------	-----	------------

Scheduled Date/Time	Type of Inspection	Inspector	Status (click to change)	<a href="#">New Schedule</a>
				<a href="#">Remove Schedule</a>

[Inspection Notice](#)  
[Set Notice Printer](#)

**MEMO**

On the inspection tab you can schedule inspections through the software. Do this by clicking on New Schedule.

The [memo tab](#) contains notes for inspectors to remember to check things. This is loaded from the setup of Inspection Type. The type of inspection and any notes that you have entered in setup will be added once you have scheduled the inspection.

**Inspection Scheduler - Building Inspections**

December 2005

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

Inspectors  By Least Saturation

Mindy Fresh  
Tina Smith

Date: 12/23/2005  
Time: 7:00 am  
Duration: 0 hr 30 min

Schedule

7:00
7:30
8:00
8:30
9:00
9:30
10:00
10:30
11:00
11:30
12:00
12:30
1:00
1:30
2:00
2:30
3:00
3:30
4:00
4:30
5:00
5:30
6:00

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. Choose the date and time when you'd like the inspection to take place, then click on Schedule.

As you can see, the inspection is now scheduled.

The screenshot shows a software interface for managing permits. The title bar reads "Permit# 91312". The main area is divided into several sections:

- Search and Details:** Fields for Search\*, Street Address (1201 ASHMORE AVENUE), Permit Type (Burning Permit), Work Class, Structure Type, Structure Use, Pro-rate Factor, Status (Pending), Project ID, Applicant (Owner), Estimate Cost (\$0.00), Total Fees (\$25.00), Total Paid (\$0.00), and Balance (\$25.00).
- Dates:** Fields for Apply Date, Issue Date, Start Date, Last Activity, Project Begin, Project Ending, and Expire Date (06/20/06).
- Navigation Tabs:** Specific, Property, Owner, Tenant, Contractor, Architect, Fee, Inspection.
- Inspection Schedule Table:**

Scheduled Date/Time	Type of Inspection	Inspector	Status (click to change)	New Schedule
Fri Dec-23-05	Building Inspections		Scheduled for Inspection	Remove Schedule
- Dropdown Menu:** A menu is open over the "Scheduled for Inspection" status, showing options: Passed Inspection - Closed, Scheduled for Re-inspection, Failed Inspection,  Scheduled for Inspection, and Pending.
- MEMO:** A text area labeled "MEMO" containing "Building Inspections -".
- Footer:** Navigation buttons (back, forward, etc.), "Delete Permit", "Print Permit", and "Options".

If you click on the status a menu of options will appear and you can select which option is best for the selected inspection.

There is also a [Daily Inspectors Report](#) that you can run. To run this report, click on [View](#) at the top left corner of the screen. Next, choose [Special Reports](#), [Permits](#), and [Inspection Report](#).

The screenshot shows a report window titled "Property Management 2.058 - 12/22/05 - [\*Inspector Report\*]". The report content is as follows:

12/22/05 1:30 PM  
Page 1

**HEIDI'S DATA**  
**Inspection Schedules**  
Inspector: **Mindy Fresh**  
Inspection Date **12/23/2005**

<p><u>7:00:00 AM</u> <b>1201 ASHMORE AVENUE</b> Building Inspections Permit No. 91312</p>	<p>Comment: Building Inspections - Instruction:</p>
---	---

This will print out scheduled inspections for each individual inspector.

## RECEIPT ENTRY

Now that you have created permits and attached them to properties, you are ready to collect payments.

Find the permit you wish to receipt in and click on the [Fees](#) tab. Next, click on the [balance](#). You can create a new batch or add to an existing batch.

When you create new, a window will come up asking you to name your batch. Then hit your enter key.

Enter Name of New Receipt Batch

Selection	
Item Description	Balance
Building Permit	\$150.00
Burning Permit	\$25.00

Allow Multiple Selections      [Unselect All](#)      [Continue](#)

If there is more than one unpaid permits or licenses attached to this property, all of those will come up. And you are able to apply payments to those at this time also.



This is the batch screen. You can enter one or more receipt entries per batch.

Next, you will print your receipt report, by clicking on [Preview Report](#).

05-DEC-20 - 12/20/2005

In the Entry Description, enter Property PIN, 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 #91312 - Burning Permit	\$25.00		405 - 407 BROADWAY	ANDERSON, PAUL H/TR
* * *	\$0.00			ROGER HARRIS

[Receipting Options](#)   
 [Delete This Batch](#)   
 Receipt Total    
 [Preview Report](#)   
 [Post Above Receipts](#)

CITY OF MORRIS

12/20/05 2:04 PM  
Page 1

**Receipts**

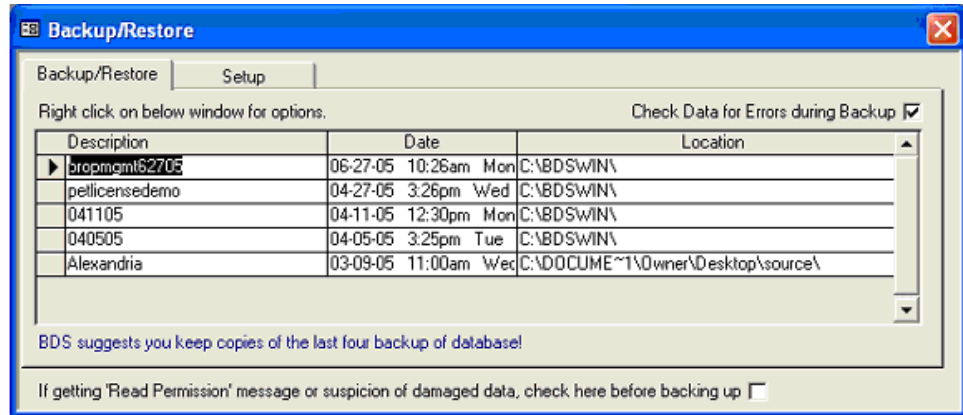
Batch Name: 05-DEC-20  
Batch Date: 12/20/2005

Description	Amount	Remark	Check#	Customer Name
Permit #91312 - Burnin	\$25.00	405 - 407 BROADWAY		ANDERSON, PAUL HTRUST
	\$25.00			

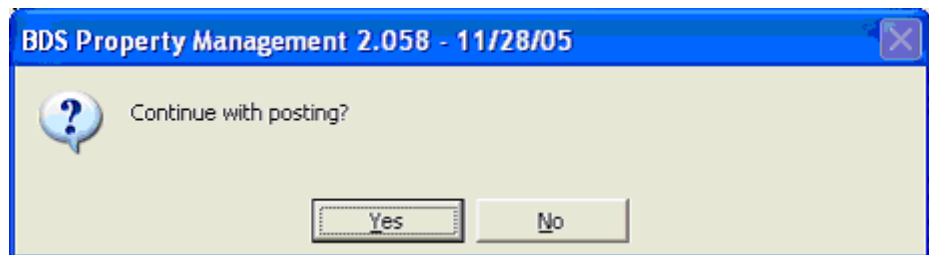
FLTR    CAPS

After you have printed your Receipt report, you are now ready to post the batch. Do this by clicking on Post Above Receipts, which is found on the lower right corner of the batch screen.

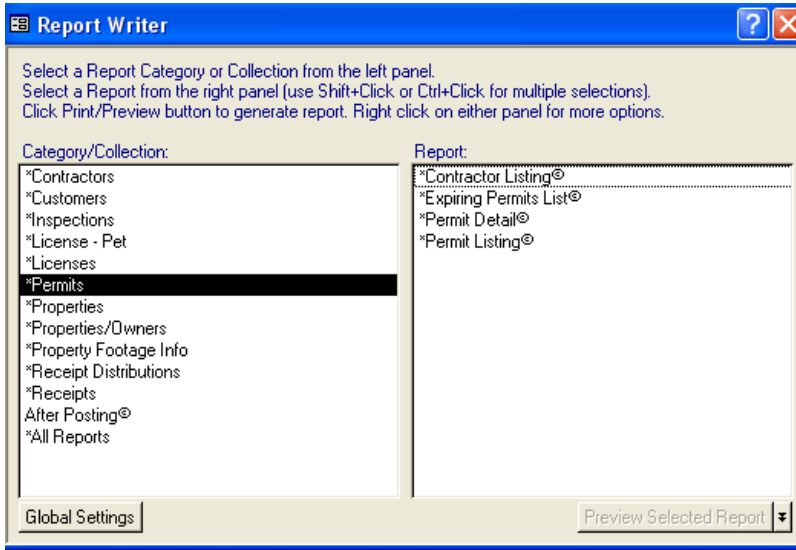
Now, the Backup/Restore window will pop up. If you choose to, you may bypass this step by closing out of the window and continue to posting. However, BDS strongly suggests that you make a backup prior to posting your receipt batch.



After you have backed up your data, Continue with posting window will pop up. Select yes and you have now posted your receipt batch.



# 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.

Permit Detail					
Permit ID	91305	PIN	00-0063-103 4000	Status	Approved
Apply Date	9/13/2005		405 - 407 BROADWAY	Zone	
Issue Date	9/13/2005	Owner	0 ROGER HARRIS		
Estimate Job Cost		Contractor	1 some burning		
\$25.00		Architect			
Permit ID	91306	PIN	101 1ST STREET	Status	Pending
Apply Date				Zone	
Issue Date		Owner	0 ROGER HARRIS		
Estimate Job Cost		Contractor	2 STEVE'S BUILDING DESIGNS		
\$0.00		Architect			
Permit ID	91307	PIN	00-0063-265 9000	Status	Pending
Apply Date			514 - 516 WILLOW DR	Zone	
Issue Date		Owner	0 ROGER HARRIS		
Estimate Job Cost		Contractor			
\$0.00		Architect			
Permit ID	91308	PIN	00-0000-000 0101	Status	Approved
Apply Date			5188 CO RD 13	Zone	