

Banyon Data Systems
SPECIAL ASSESSMENTS & VIOLATIONS

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READ ME FIRST

Software Installation

- Only install to the local drive of PCs where the application is run.
- Have a minimum of 1-2 Gig of free disk space available to install.
- Close all programs before installing the BDS Software
- Insert the BDS CD in the CD-ROM Drive
- Follow instructions on the screen to complete the installation.

Using the Software

There is an icon (shortcut) for each installed application. Click on the icon and the software will ask for your security password.



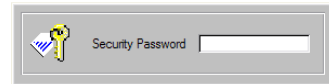
Two passwords are available. They are: **MASTER** and **BDS**

The **MASTER** password, is used to setup and change passwords. The **BDS** password, is used to access the application software. The password BDS has been set up for you. In addition, you can assign Rights to passwords for those who will be looking through the data but not allowed to make entries or changes. The default access rights is Full Read/Write access.

Creating New Passwords and Changing MASTER Password

1. At the password entry screen enter your master password: MASTER and then press ENTER key

NOTE: If you have changed MASTER enter that password instead.



2. The Password screen then appears:

Under **User Name**, click on next open field, enter new user name, and then enter password. Using the drop down list, select the rights level for this user.

User Name	Password	Rights
MASTER PASSWORD	LAUJLQ	Read/Write
BDS	XUM	Read/Write
New Name	l3ice	Read/Write

Click to Return to Password Entry Screen

To change MASTER Password, simply click on password field for master password and enter in new MASTER Password. **Note: If you change your Master password, please keep it on file so BDS can have access to your password setup when and if needed.**

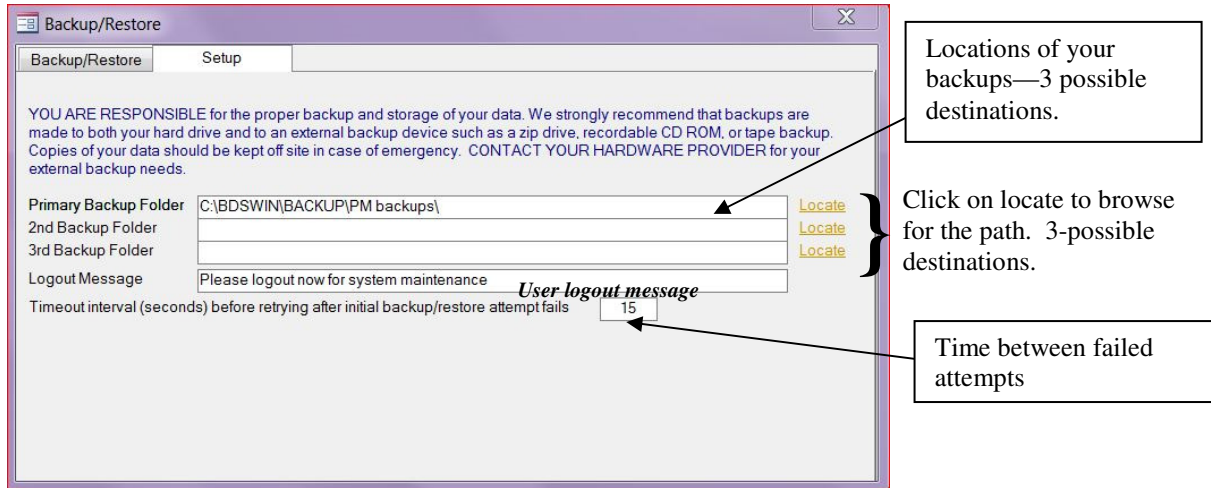
When you are finished entering all users, select the on **“Click to Return to Password Entry Screen”**. This will take you back to **Enter Password** screen, where you can enter your security password and begin working.

Backup/Restore

Backups are very important as copies of data can protect you against loss or damage. Reconstructing work can be time consuming and sometimes impossible. **It is important to keep at least four backups at all times.**

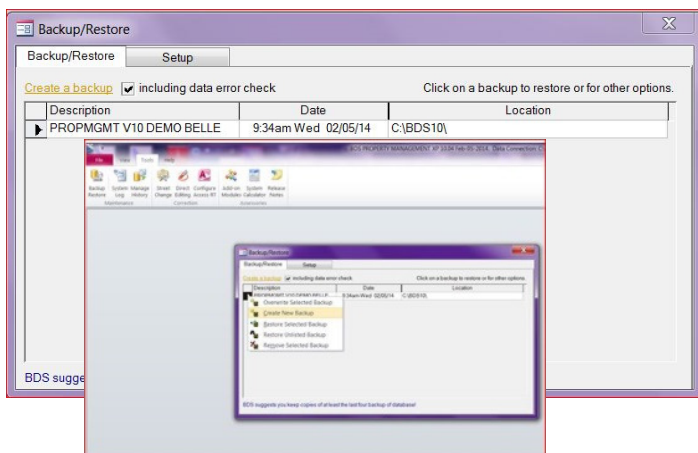
To use Backup/Restore: Click on **Tools** on the top menu bar and select **Backup/Restore**.

Setup Tab: The default backup path is c:\bdswin\. You can change it to the path or folder of your choice in the setup screen.



IMPORTANT NOTE: Please be advised that it is the responsibility of the operator to ensure that a backup is performed. This backup may be made to a directory on a computer server, station or to tape. If you desire to make your backups to tape on a regular basis please consult with your hardware vendor and ask to have the **Data** directory backed up on a regular basis.

Backup/Restore Tab: By right clicking on record selector of the chosen backup, the popup menu will now appear with all the options available to choose from.



- To create a new backup, select **Create New Backup**.
- To search for a backup that is not listed, select **Locate Unlisted Backup**.
- To restore a backup, select **Restore Selected Backup**.
- Use **Remove Selected Backup** to delete unwanted backup files to free up disk space.

Note: To rename a backup, simply highlight the description of chosen backup and then type a new description.

General Software Navigation- USING THE RIBBONS

File Menu

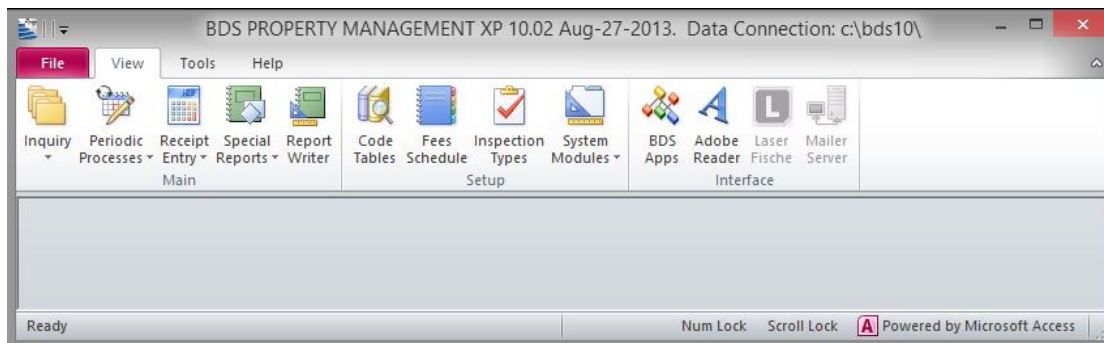
The Banyon Data Property Management software program for Version 10 uses four main ribbons for navigation. These four areas are found at the upper left corner of the Window. They include: File, View, Tools and Help.



The File menu option opens with general information “About” Banyon Data Systems including a Suggestion Box, a link to our web site, link to check for updates available and a link to our Products web site products page.

View Menu

The next Ribbon tab is View tab. This tab contains the options designed specifically for the software application and contains many of the menu items available in previous versions of the program. You will be familiar with the new icons and descriptions if you have used the early versions of the software before.



The Ribbons, when opened, are divided into segments. For instance, on the View menu Ribbon, the far left position is devoted to Main use items whereas the far right segment is devoted to the Interface use items. The category in the middle segment provides for the Setup.

Tools Menu

Next Ribbon option on the menu is the Tools tab. This tab, much like the original Tools tab in the upper right of the previous programs provides the basic system information including:

Maintenance:

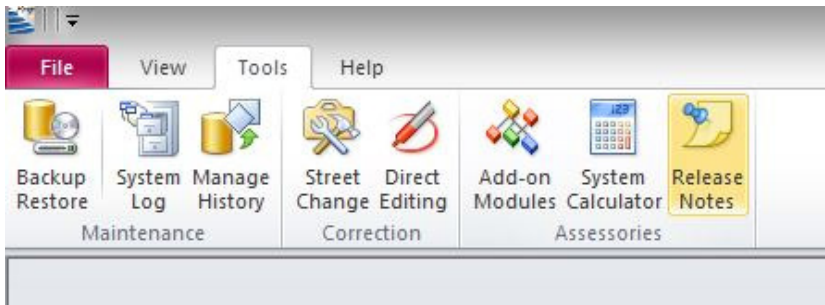
- Backup or Restore Data
- View System Log of Operator Activity
- Manage History

Correction (Data):

- Street Change
- Direct Editing of Data (Be careful)

Accessories:

- Add on Modules
- System Calculator
- Release Notes- What's New



System log shows abbreviated notes about what has been added, fixed and changed in the program with a date stamp.

The BDS Add-On Modules item on the Accessories Ribbon segment allows Banyon Data Systems to turn on modules purchased by your entity using a password.

Contact Banyon Data Systems for Add-on module information at (800) 229-1130.

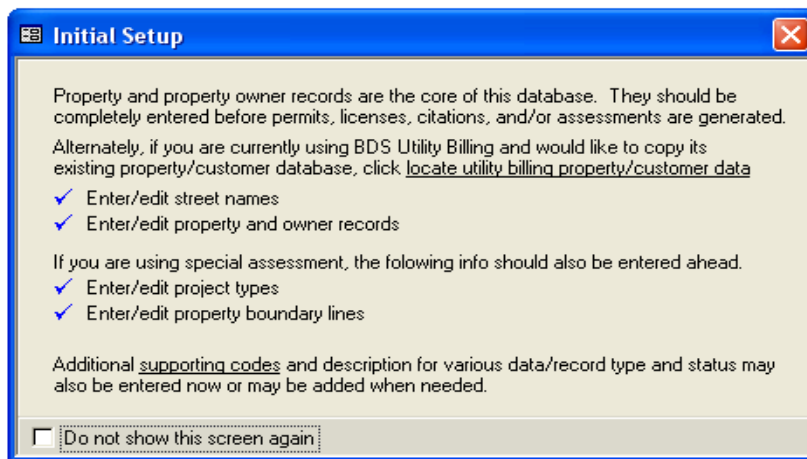
INTRODUCTION TO PROPERTY MANAGEMENT SPECIAL ASSESSMENTS

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

This manual will cover Property Management: Special Assessment Module.

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.



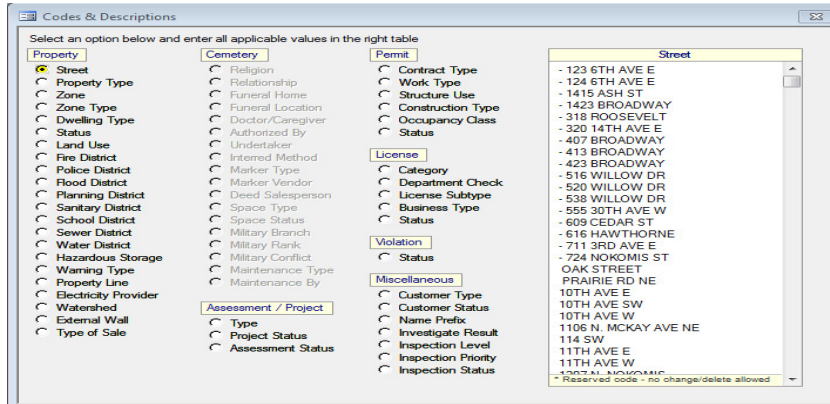
This is the first screen you will always see after the password entry. As you become more familiar with the above basic information and regular updates to it are no longer a daily task, check the **Do not show this screen again** to disable it in the future. You will still be able to get to this type 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 4.

CODE AND DESCRIPTION SETUP

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

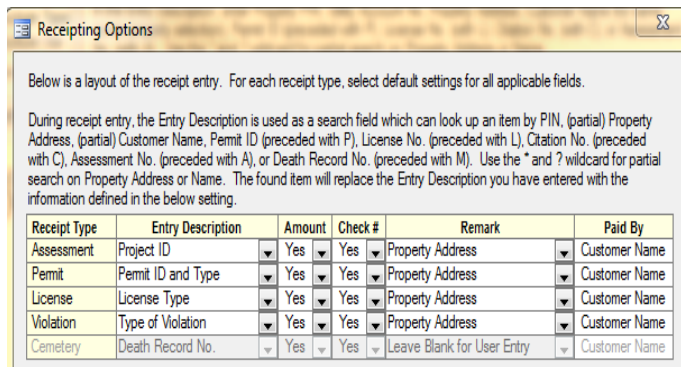


Setup of Codes and Descriptions is a collection of valid data items to be used in the different areas of the software.

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



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.



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

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

Building tab

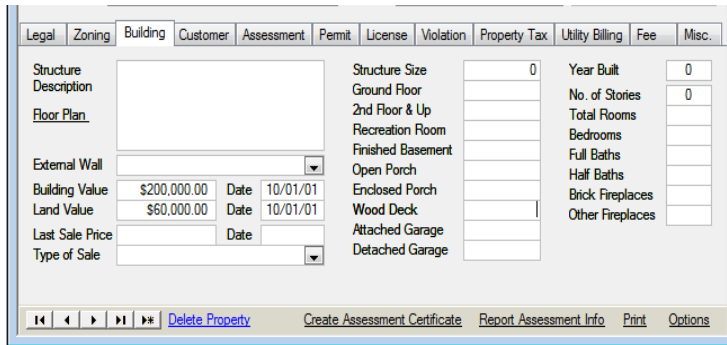
Attach a floor plan, values of building and land, sale prices, size, year built, bedrooms, baths & more!

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											
Floor Plan											
External Wall											
Building Value	\$200,000.00	Date	10/01/01								
Land Value	\$60,000.00	Date	10/01/01								
Last Sale Price		Date									
Type of Sale											
Structure Size											
Ground Floor											
2nd Floor & Up											
Recreation Room											
Finished Basement											
Open Porch											
Enclosed Porch											
Wood Deck											
Attached Garage											
Detached Garage											
Year Built											
No. of Stories											
Total Rooms											
Bedrooms											
Full Baths											
Half Baths											
Brick Fireplaces											
Other Fireplaces											

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.

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, & 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.

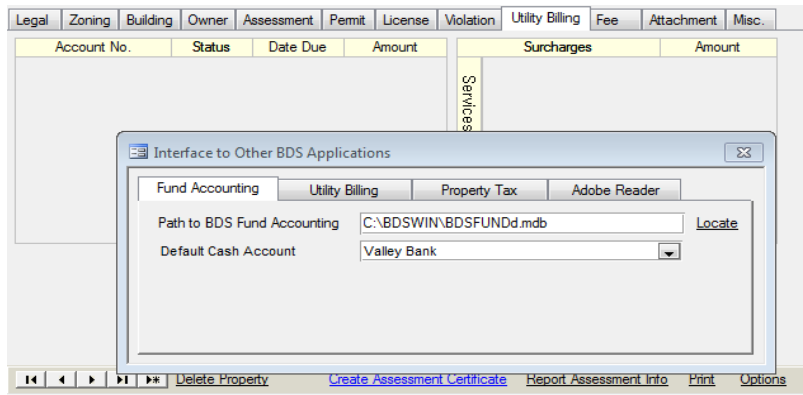
To view a specific permit for example, click on it and select specific to view that permit detail. You can also create or attach a new permit, license, etc for the property from these tabs.

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

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 bdsbd.mdb



Fee tab

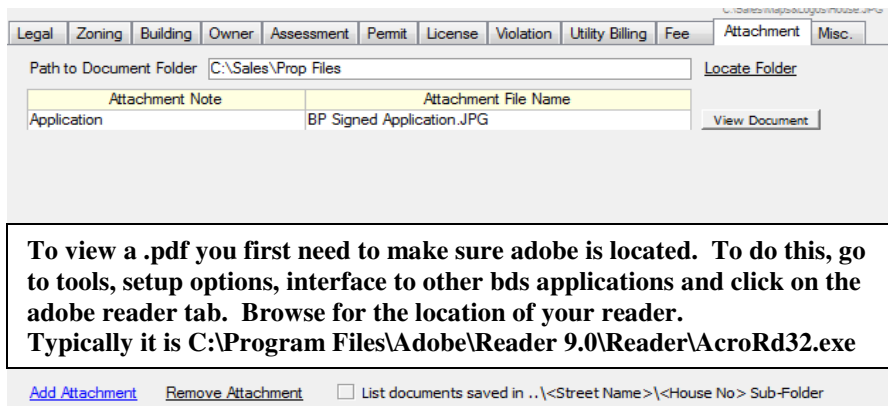
Attach miscellaneous fees to the property. Fees can be set up under tools, setup options, and fees. Adding fees are talked about more in the permit and license section of the manual.

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.



To view a .pdf you first need to make sure adobe is located. To do this, go to tools, setup options, interface to other bds applications and click on the adobe reader tab. Browse for the location of your reader. Typically it is C:\Program Files\Adobe\Reader 9.0\Reader\AcroRd32.exe

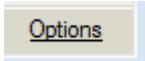
Misc. tab

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 #.

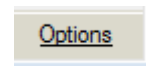
CREATING NEW DEVELOPMENT

To add a new development you can click on the options  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 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 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

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.

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

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.

The Personal Tab interface includes the following fields:

- Title
- First Name: Chris
- Last Name: Olson
- Drivers Lic #
- Soc Sec #
- Birth Date
- Weight
- Height
- Eye Color
- Hair Color
- Ethnicity
- Race
- Sex
- MEMO
- Navigation: Home, Back, Forward, Next, Previous, 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.

The Property Tab interface includes the following elements:

- Owned Properties:
 - 88-9944-344 2232 8217 38th Ave N
 - 8219 38th Ave N
- Other Party of Interest on Selected Property
- Buttons: Attach New Property, Remove Selected Property, More Property Info
- Navigation: Home, Back, Forward, Next, Previous, 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.

Permit No.	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

Buttons: 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, Assessment, Violation, Utility Billing. The 'Contractor' tab is active. It features a table with columns 'Name', 'Type', and 'Expire'. One entry is visible: 'Olson Construction', 'General Contractor', '02/01/13'. To the right of the table are several input fields: 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 bottom of the window are navigation icons and a 'Delete Customer' button.

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 bdsbnd.mdb.

The screenshot shows a software interface with a tabbed menu at the top: Legal, Zoning, Building, Owner, Assessment, Permit, License, Violation, Utility Billing, Fee, Attachment, Misc. The 'Utility Billing' tab is active. It displays a table with columns 'Account No.', 'Status', 'Date Due', 'Amount', 'Surcharges', and 'Amount'. A dialog box titled 'Interface to Other BDS Applications' is open over the table. The dialog has tabs for 'Fund Accounting', 'Utility Billing', 'Property Tax', and 'Adobe Reader'. The 'Utility Billing' tab is selected. It contains two 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'. At the bottom of the window are navigation icons and buttons: 'Delete Property', 'Create Assessment Certificate', 'Report Assessment Info', 'Print', and 'Options'.

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.

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.

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
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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

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

Next, fill in all relevant information for the contractor.

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.

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

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 a web form with tabs for Contact, Agent, License, Permit, Violation, and Misc. The Contact tab is active. The form contains the following fields:

Name	Olson, Chris	Tax ID	
Attention		DP Code	
Address	8217 38th Ave N New Hope MN 55427	Camior Route	
Country		Home Phone	
	More Info	Work Phone	
		Fax Number	
		E-Mail	

Navigation buttons: Home, Back, Forward, Refresh, Delete Contractor

Agent tab

Signing Agent	Position	Phone	Birthdate	Driver License No.

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)

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

Details for Permit No. 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

Navigation buttons: Home, Back, Forward, Refresh, Delete Contractor

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.

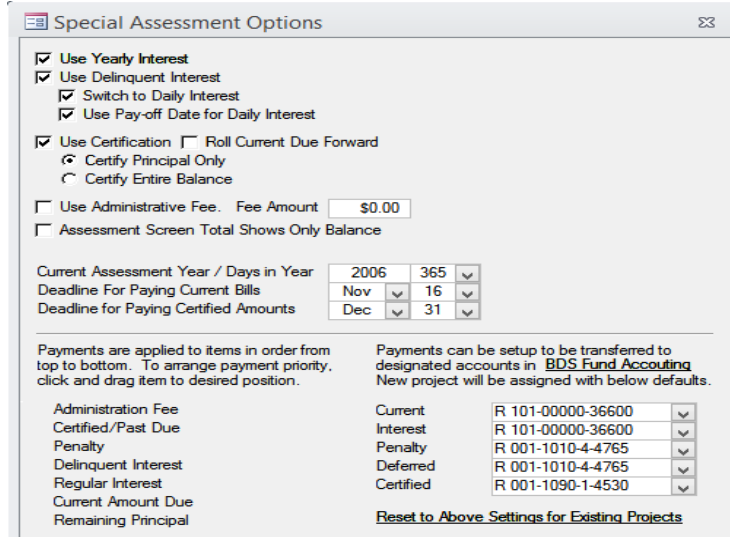
Licenses, permits, and violations can also be attached from the contractor screen.

Misc tab

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

Setup Assessments

From the main property management screen choose view, system modules, then assessments. This will bring up the Special Assessments Options Screen.



These settings involve the interest and penalty calculations, and receipt distribution options.

Check the appropriate boxes and enter data values that are applicable to your entity.

Yearly Interest, or also called regular interest, is interest imposed on the assessment balance and computed once every year.

You can use either Yearly Interest or Delinquent Interest or

both. **The Delinquent Interest** is applied to current assessment due. This interest is computed on demand or at the time the interest calculation is executed. If you wish you can use **Daily Interest** that is reflected at the time of assessment inquiry.

The **Use Payoff Date** option works in conjunction with the Daily Interest. This enables you to project the interest due to a future date thus letting customers know what they will need to pay by certain due date. The Payoff Date is adjustable at the individual assessment screen. By default, it is the last day of the current month.

In using **Certification**, certified amounts are no longer considered “due” by the software. However the customers still have a grace period to pay them. The cut off for this grace period or **certification deadline** is set in Date Settings tab. Once past the cut off date, the certified amounts become part of the property tax, which will be collected by your taxing authority.

If you do not wish to send the unpaid due to another tax collection agency, use **Accumulate Current Due** instead. Any unpaid balances will become part of the past due amount when End of Year is processed.

If you wish to attach an **Administrative Fee** to the assessments, check this option and enter the default charge.

The deadline for paying current due is printed on the assessment bills. After such date, certification will take place. Late fee and interest calculation may be run before the certification process.

Distribute Priority enables you to define the order due items are to be paid in. Simply click a line item and move up or down to create your priority list.

Payments are applied to items in order from top to bottom. To arrange payment priority, click and drag item to desired position.

- Administration Fee
- Certified/Past Due
- Delinquent Interest
- Penalty
- Regular Interest
- Current Amount Due
- Remaining Principal

Receipt Distribution Setup allows a designated fund accounting account code to be assigned to each option listed. Simply click on the drop down to choose the code.

Payments can be setup to be transferred to designated accounts in **BDS Fund Accounting**. New project will be assigned with below defaults.

Current	R 101-00000-36600	▼
Interest	R 101-00000-36600	▼
Penalty	R 001-1010-4-4765	▼
Deferred	R 001-1010-4-4765	▼
Certified	R 001-1090-1-4530	▼

[Reset to Above Settings for Existing Projects](#)

If there are no codes listed, click on the BDS Fund Accounting option and locate the path to BDS Fund Accounting. If the account code is simply not in the list, then it will need to be added first directly from the BDS Fund Accounting Chart of Accounts area.

Reset to above settings for existing projects:
*Only click on this option if you are SURE you want these settings to be applied to ALL existing projects/assessments.

Assessment/Project Custom Fields

Fields like project type, project status, and assessment status can be customized. Click on view, code tables, and then look in the assessment/project section radio buttons.

The screenshot shows a window titled "Codes & Descriptions" with a sub-header "Select an option below and enter all applicable values in the right table". It contains several columns of radio button options:

- Property:** Street, Property Type, Zone, Zone Type, Dwelling Type, Status, Land Use, Fire District, Police District, Flood District, Planning District, Sanitary District, School District, Sewer District, Water District, Hazardous Storage, Warning Type, Property Line, Electricity Provider, Watershed, 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.
- Assessment / Project:** Type, Project Status, Assessment Status.
- Permit:** Contractor 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.
- Project Status:** Levied, Pending, Proposed, Expired, Accepted.

Click on the type radio button and default types will be displayed. BDS generated options will have an *by them. To add to the list, simply type in right hand column the description wanted.

Descriptions/fields can also be edited or deleted from this screen.


***Please note that BDS * options may not be edited or deleted.**

GENERALIZE STEPS FOR SPECIAL ASSESSMENT
(Detail on each step will follow in the manual)

1. Create the project under view, inquiry, project.
2. Using the project cycle checklist, enter in the required information
3. Generate the assessment roll
4. Verify the assessed properties
5. Calculate the assessment
6. Verify the assessed amounts
7. Run the payment schedule test (amortization schedule) optional.
8. Print hearing notices
9. Print proposed notices
10. Set status to levied
11. Print final notices
12. Calculate current bill
13. Print full bills
14. Enter receipts
15. Calculate penalty and interest if payment is past the due date
16. Run certification process of unpaid bills to the county (optional)

Creating A Project

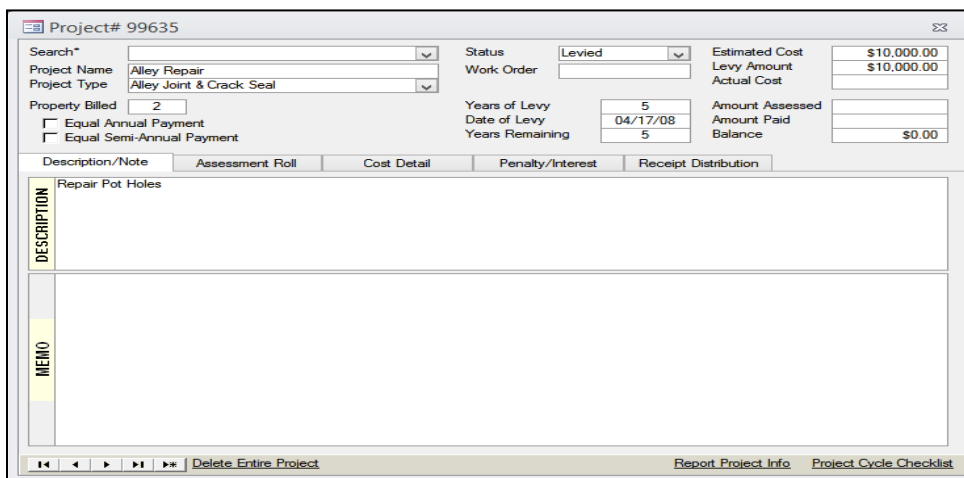
The project database holds information on projects levied by the city. Each project normally has multiple assessed properties.

To begin creating a project or to do a lookup of an existing project click on view, inquiry, project. To create a new project click on the  icon at the bottom and enter in a project name.

Enter Project Name:

To search for an existing project simply click in the search drop down and enter a project number or name.

Search*



Project# 99635

Search*

Project Name

Project Type

Property Billed

Equal Annual Payment

Equal Semi-Annual Payment

Status

Work Order

Years of Levy

Date of Levy

Years Remaining

Estimated Cost

Levy Amount

Actual Cost

Amount Assessed

Amount Paid

Balance

Description/Note Assessment Roll Cost Detail Penalty/Interest Receipt Distribution

DESCRIPTION

Repair Pot Holes

MEMO

Delete Entire Project Report Project Info Project Cycle Checklist

Required Fields

Each project that is created will require the following fields to be filled in: project type, description, estimated cost, levy years, date of levy, and interest rate.

If a project type is not listed, simply enter a new type and it will be displayed in the drop down list. **See project setup section to modify existing project types. (view, code tables, assessment/project.)*

Description/Note Tab- can be printed on notices as well as the memo field.

Penalty/Interest tab- Enter in interest rate, delinquent interest rate (if applicable), penalty rate, or amount.

Interest Grace Period- this is the length of time between the levy date and the date that interest is to be calculated. Payments will not be used to pay interest (if interest has been calculated) until after the grace period expires. Note that the system does not automatically calculate interest when the grace period expires.

*Penalty Amount- either the penalty amount or a percent may be used but not both.

To ensure you have the required information filled in select “project cycle checklist” from the bottom right, then click “enter required information”. This will show a check mark by the fields that have been filled out. Click on an unchecked field to enter the information.

Optional Fields

Status- use the drop down to select an appropriate status. If a needed status is not listed, simply type one in and it will be added to the list. *To edit the list, see project setup area. (view, code tables, assessment/project section.)

Work Order- used to group a number of projects together.

Equal Annual Payment Box- If you would like the principal plus interest to add up to the same dollar total every year, check this box. If you only want the same principal amount and a varying interest amount each year, do not check the box. **If the box is checked, current bill and interest will be calculated at the same time and not separately.*

Even Semi-Annual Payment- check this box if you wish to have the current bill plus interest to be rounded off to an even amount so that the total is divisible by the number of payments (two).

Informational Fields

Years Remaining- the number of years remaining in the project. Calculations of current bills are based on this number.

Amount Paid- the amount paid against the amount assessed. Certified amounts are considered paid and are included in this amount.

Amount Assessed- the actual dollar amount assessed to properties. The system calculates and updates this amount during the initial assessment calculation.

Properties Billed- the number of assessments attached to this project. This field is automatically updated as properties are added and removed from the assessment roll.

Project Cycle Checklist (bottom right of project screen)

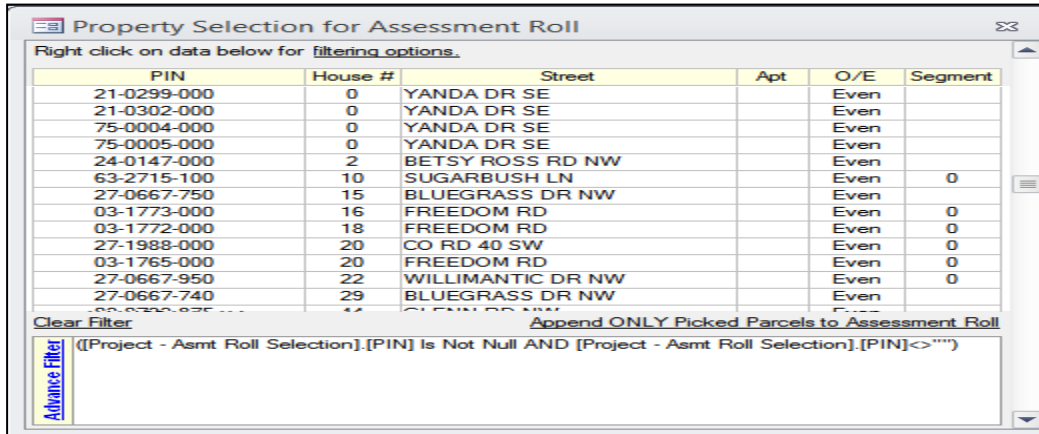
[Project Cycle Checklist](#)

The project cycle checklist is not only used to verify the required information but also every essential step of the project is chosen from this list.

As a task is completed, a blue check mark will appear on the left. Some of the tasks are enabled/disabled by the project status. Available tasks may be repeated. While some need to be done in sequence, others can be done in any order.

Generating The Assessment Roll

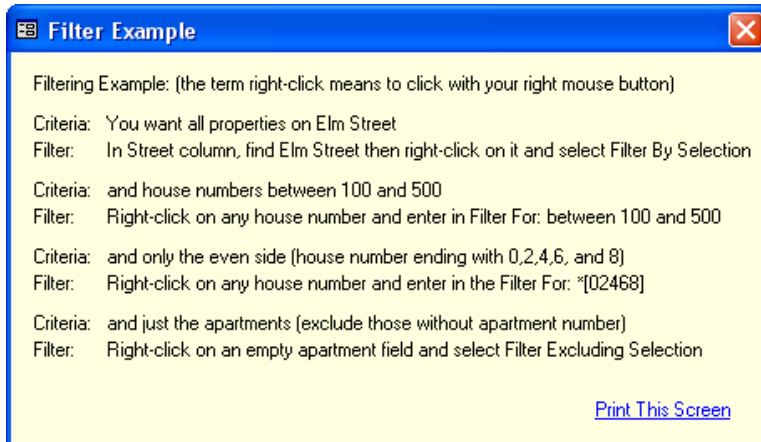
The Assessment Roll allows properties to be selected for the assessment. To assign parcels to the project click on “project cycle checklist” on the bottom right and then choose “generate assessment roll.” The property selection screen will now be displayed.



This screen will enable you to select one or multiple properties by PIN, street name, address, odd/even house numbers.

To manually select which parcels, simply click on the Parcel/PIN number to highlight and then choose “append only picked parcels to assessment roll.”

The filter can be used to filter out only a certain street, segment, etc. Click the cursor on a street name and then right click and choose filter by selection. Only that street will now be listed. You can now click on the option that says “Append all above parcels to assessment roll.”



*For help on using the filter, click on Filtering Options on the top (above house #)

Once the append properties option is clicked, the project screen will appear with the chosen parcels displayed. From the project cycle checklist, click on verify assessed properties to run the verification report.

Project# 99646

Search* [] Status: Proposed Estimated Cost: \$300,000.00
 Project Name: MAIN ST SIDEWALK Work Order: [] Levy Amount: \$300,000.00
 Project Type: Sidewalk Actual Cost: []

Property Billed: 5 Years of Levy: 5 Amount Assessed: \$0.00
 Equal Annual Payment Date of Levy: 10/20/14 Amount Paid: []
 Equal Semi-Annual Payment Years Remaining: 5 Balance: \$0.00

Description/Note: Assessment Roll Cost Detail Penalty/Interest Receipt Distribution

Property Address	Primary Owner	Original	Remaining	Principal	Interest	YTD Certified
W LATOKA DR SW	LUNDGREN, DONALD A/ETAL		\$0.00	\$0.00	\$0.00	\$0.00
W LATOKA DR SW	GROGAN/MARYANN E & STEP		\$0.00	\$0.00	\$0.00	\$0.00
W LATOKA DR SW	LARSON, BRIAN W & KAREN L		\$0.00	\$0.00	\$0.00	\$0.00
W LATOKA DR SW	PETERSON, VICTOR/ETUX/TF		\$0.00	\$0.00	\$0.00	\$0.00
W LATOKA DR SW	JONES, HARRIET L & ERMAL A		\$0.00	\$0.00	\$0.00	\$0.00

Add Property Remove Property More Property Info More Owner Info More Assessment Info

Delete Entire Project Report Project Info Project Cycle Checklist

To remove a single property, click on its record selector, then click Remove Property.

To remove a block of properties, click on the record selector of the first property in the block, scroll down to the last property. Next, click remove property and the whole block will be removed.

Assessment Calculation

From the project cycle checklist choose calculate assessment. There are three ways of calculating:

Flat Rate- specific amount per unit per assessment, independent of assessed footages. If you do use this option, make sure each assessment has one or more units filled in on the misc. tab on the property screen. (Res or Commercial units field) Contact Banyon if you want all parcels defaulted to one.

Calculate Assessment for Project 99646

Calculation Method
 Flat Rate. Amount per Unit Charged to Each Assessment: \$60,000.00 Auto Calc.
 Footage Calculation. Use Computer Estimate

Calculate All Assessments

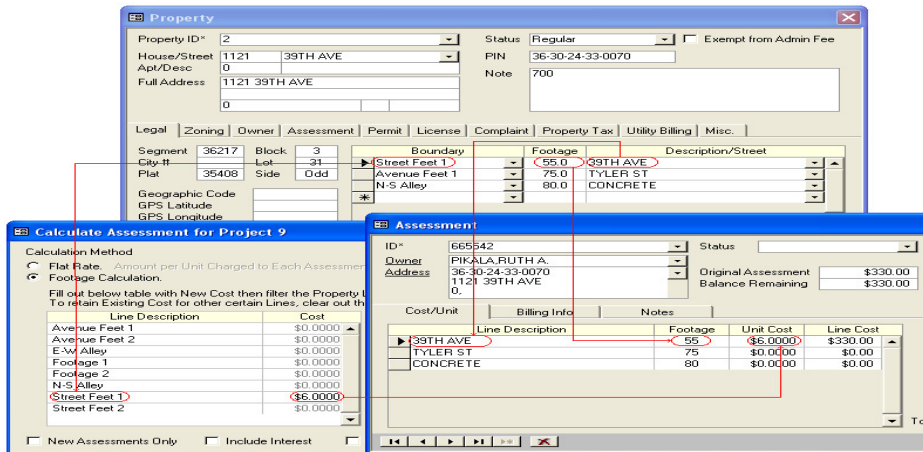
Microsoft Access
 Select Yes to round up to nearest penny which may result in a higher Total Assessment than the Project Estimate. Select No may result in lower amount.
 Yes No

Auto Calc- will divide the estimate cost equally between the number of parcels.

Footage Calculation

The computed assessment against a property is the sum of footage * cost per foot. The footage comes from the property. The cost per foot comes from the calculation screen. It is important to have the footage entered correctly when you created the property.

The below “property” screen is where the footage is entered on a property. View, inquiry property, and then choose the legal tab.



Once the desired method is chosen and the correct footages (if used) are entered. Click on the “calculate all assessments” button to begin.

After the assessment has been calculated, you can adjust the footage or cost per foot for individual assessment. From the project screen click on assessment roll, choose the parcel, choose “more assessment info” on bottom right, then cost/unit. The above assessment screen will now be displayed.

The same screen can also be accessed from view, inquiry, property, then choose the assessment tab. Next, click on the project and choose “more on assessment”, then cost/unit.

Verify Assessed Amounts

After the assessment calculation continue with the “project cycle checklist” and choose the option to “verify assessed amounts” to run the assessment roll verification.

Amortization Schedule

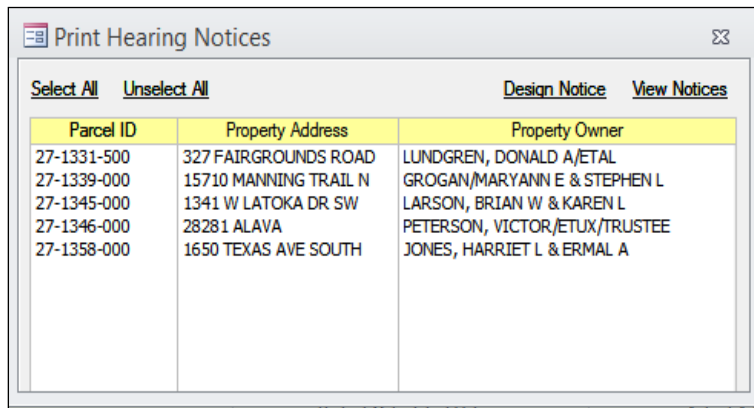
Property Address	Owner	Year	Principal	Interest
W LATOKA DR SW	JONES, HARRIET L & ERMAL A	2016	\$12,000.00	\$1.78
W LATOKA DR SW	PETERSON, VICTOR/ETUX/TRUSTEE	2016	\$12,000.00	\$7.20
W LATOKA DR SW	LARSON, BRIAN W & KAREN L	2017	\$12,000.00	\$5.40
W LATOKA DR SW	GROGAN/MARYANN E & STEPHEN L	2018	\$12,000.00	\$3.50
W LATOKA DR SW	LUNDGREN, DONALD A/ETAL	2019	\$12,000.00	\$1.80
		Total	\$60,000.00	\$19.78

An amortization schedule can be printed from the project cycle checklist by choosing “run payment schedule test.”

Click on print schedule on the bottom right and then choose current parcel selected or all parcels to be printed. If you want this step marked as completed, choose “mark checklist as done” from the bottom left.

Print Hearing & Proposed Notices

From the project cycle checklist choose print hearing notices or proposed notices.



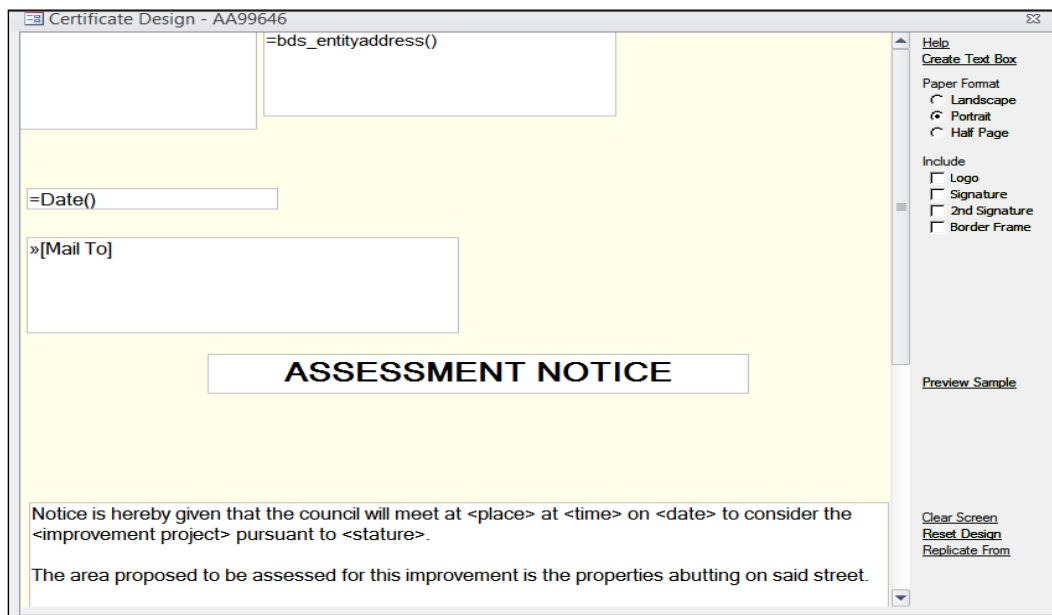
The screenshot shows a window titled "Print Hearing Notices" with a table containing the following data:

Parcel ID	Property Address	Property Owner
27-1331-500	327 FAIRGROUNDS ROAD	LUNDGREN, DONALD A/ETAL
27-1339-000	15710 MANNING TRAIL N	GROGAN/MARYANN E & STEPHEN L
27-1345-000	1341 W LATOKA DR. SW	LARSON, BRIAN W & KAREN L
27-1346-000	28281 ALAVA	PETERSON, VICTOR/ETUX/TRUSTEE
27-1358-000	1650 TEXAS AVE SOUTH	JONES, HARRIET L & ERMAL A

Once the notice has been designed select all parcels or certain ones and then click on view notices. The boxes can be moved around under the design feature to fit a window envelope.

Design Notice- click to setup your own custom notices.

- Add text boxes, logo, signatures, etc.
- Fields can be added that are relevant to the assessment like project name, number, assessed amount, etc.
- Contact us for help on setting up your notice.



Levied Status

Once the assessment has been levied, change the status on the project to levied. This will then allow you to finish the rest of the project cycle checklist.

Print Final Notices

Once the status of the project has been set to levied, final notices can be printed. From the project cycle checklist, choose “print final notices”. The same design and print options can be followed from the PRINT HEARING NOTICES on the previous page.

Calculate Current Bill

When you are ready to calculate a current bill for the assessment, choose calculate current bill from the project cycle checklist.

Print Full Bills

To print bills, choose “print full bills” from the project cycle checklist.

The screenshot shows a window titled "Assessment Full Bill" with a "Print" button in the top right. Below the title bar, a note states: "The language in below box can be edited (with Text Formatting) for each project. Enclose all variable fields in { }." The main content area contains a bill template with the following text:

October 22, 2014

{Owner Name}
{Property Address}
{Parcel #}

Dear {Owner Name}:

Enclosed is your bill for the assesment on the street project.

{Original Amount}
{Balance}
{Amount Due} by December 31, 2014

A 1.5% penalty will be added to those assessments not paid by the due date.
Assessments will then be certified to your tax bill.

Available Variables:

- {Original Amount}
- {Principal}
- {Balance}
- {Amount Due}
- {Interest Due}
- {Penalty}
- {Admin Fee}
- {Date Due}
- {Parcel #}
- {Owner Name}
- {Property Address}
- {Segment}
- {Plat}
- {Block}
- {Lot}
- {Sub Division 1}
- {Sub Division 2}
- {Legal Description}

At the bottom, there is a form for "Make checks payable to:" with the text "Banyon Data Systems, Inc." and a table:

Amount Due	\$12,000.00
Due Date	Dec 31, 2014

The bottom of the window shows a status bar with "Record: 14", "1 of 5", and a "Filtered" button.

Simply type any wording needed on the bill. Variable fields are available to automatically insert when the bills are printed. For example, to have the owners name print on the bill use {owner name} and it will be inserted when printed.

Amount Due- drop down allows either remaining balance or current due to be chosen.

Due Date- when the due date field is clicked, the project screen will appear where the date can be entered in the “Next Payment Due Date” field.

Choose PRINT on the top right to print the bills.

ENTERING RECEIPTS FOR ASSESSMENT PAYMENTS

Receipts can 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.

***If you are a Banyon Point of Sale user, Assessment payments can be take in through BDS Point of Sale too.**

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.

Entry Description	Amount	Check #	Remark	Customer
Pet Tag No. 0834	\$10.00		136 WALNUT STREET SOUTSEGNA, LAWRENCE M &	
Pet Tag No. 0835	\$10.00		136 WALNUT STREET SOUTSEGNA, LAWRENCE M &	
Permit B-130064	\$130.00		990 LACY COURT	
Permit Z-130087	\$50.00		119 CHESTNUT STREET SC	
Permit Z-130085	\$50.00		956 IVY HILLS ROAD	
Violation 1558 - Improper Outside Storage/Rubbish	\$150.00		400 FOREST STREET EAST SKELLEY, MATTHEW & F	
Violation 868 - Parking-Unpaved Surface	\$500.00		802 FOREST STREET WESTSCHAAF, STACY	
	\$0.00			

On this screen a receipt can also be entered by Assessment # If entering by assessment # you would enter A and then the #. Instructions are given at the top of the batch screen.

Receiving Options: This allows you to choose what information is displayed by default in the entry description and remark.

Other Areas To Enter Receipts From:

- Banyon Point of Sale (if purchased)
- Receipts can also be entered from the property or owner screen. Once the property or owner is looked up click on “charges” and you can choose what is being paid for and add it to a current batch or create a new batch.
- From the assessment tab on a property or owner you can also click on balance due.
- The final way to enter in a receipt is directly from the assessment screen by choosing view, inquiry, and then assessment. Click on the billing info tab and then click on the amount due.

POSTING RECEIPT BATCHES

As payments 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 and deposit. (the batch does not have to be posted daily)

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

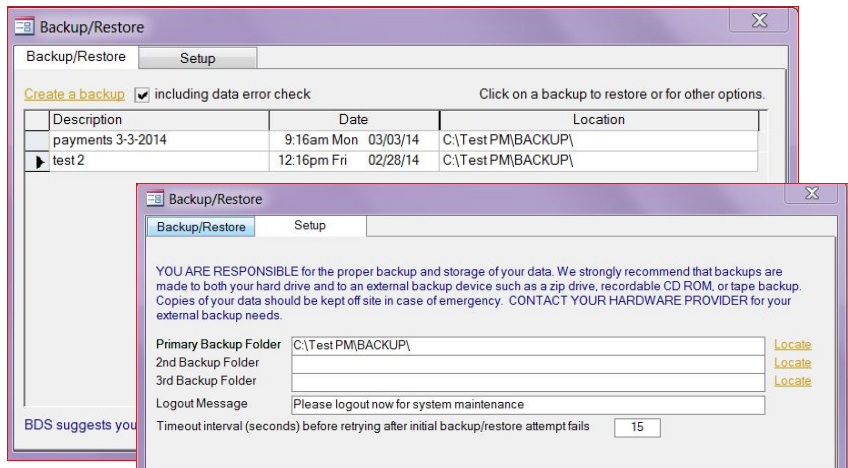
The first step is to click on **PREVIEW REPORT** to verify or have a print out of the receipts entered. (This can be recalled again if you do not want to actually print, but simply review on screen)

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

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.

Receipt Distribution

Receipt Batch to distribute to Accounting: 13-May-07

Accounting External Batch to merge into (optional):

Summary by Account (selected)
 Summary by Item
 Detail

Description	Distributed Account	Amount
Violation 868 - Parking-Unpaved Surface		\$500.00
Violation 1558 - Improper Outside Storage/Rub		\$150.00
Pet Tag No. 0835	R 101-000000-032240	\$10.00
Pet Tag No. 0834	R 101-000000-032240	\$10.00
Permit B-130064	R 101-000000-032210	\$75.00
Permit B-130064	R 101-000000-032210	\$50.00
Permit B-130064	G 101-021712	\$5.00
Permit Z-130087	R 101-000000-034103	\$50.00
Permit Z-130085	R 101-000000-034103	\$50.00

Print

Click the amount to distribute to Fund Accounting: \$900.00

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 Print on the bottom left corner to 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.

Batch Name	Created	Amount	Posted
10-Apr-05	4/5/2010	\$150.50	4/6/2010
10-Apr-06	4/6/2010	\$152.47	4/7/2010
10-Apr-08	4/8/2010	\$597.37	4/8/2010
10-Apr-09	4/9/2010	\$143.15	4/12/2010
10-Apr-13	4/13/2010	\$12,436.71	4/14/2010
10-Apr-14	4/14/2010	\$11,639.18	4/15/2010
10-Apr-15	4/15/2010	\$100.00	4/15/2010
10-Apr-16	4/16/2010	\$350.50	4/16/2010
10-Apr-19	4/19/2010	\$502.00	4/19/2010
10-Apr-20	4/20/2010	\$390.50	4/21/2010
10-Apr-22	4/22/2010	\$11,383.69	4/22/2010
10-Apr-23	4/23/2010	\$251.40	4/26/2010
10-Apr-26	4/26/2010	\$326.85	4/26/2010

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

Calculate Penalty

****Make a backup before calculating***

After the due date of assessment payments penalty and interest can be calculated from the project cycle checklist.

Verify penalty rate and options, then click “start calculation.”

Calculate Interest

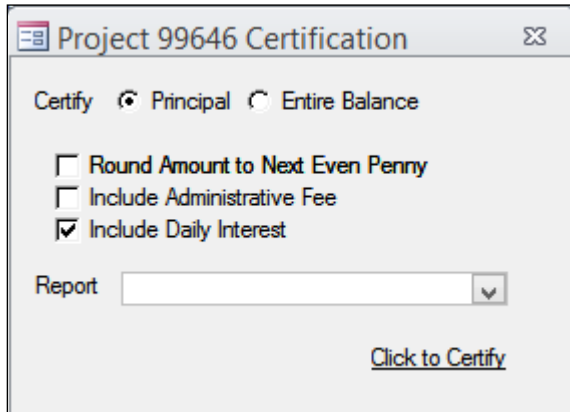
****Make a backup before calculating***

From the project cycle checklist, choose calculate interest and enter date to calculate interest up to.

Certification

****Make a backup before certification***

If unpaid balances need to be certified to the county, then choose “project certification”

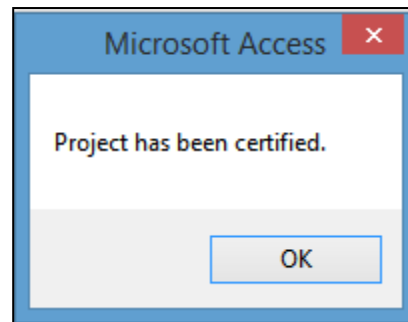


The screenshot shows a dialog box titled "Project 99646 Certification". It has a close button in the top right corner. Below the title bar, there are two radio buttons: "Principal" (selected) and "Entire Balance". Below these are three checkboxes: "Round Amount to Next Even Penny" (unchecked), "Include Administrative Fee" (unchecked), and "Include Daily Interest" (checked). There is a "Report" label followed by a dropdown menu. At the bottom right, there is a button labeled "Click to Certify".

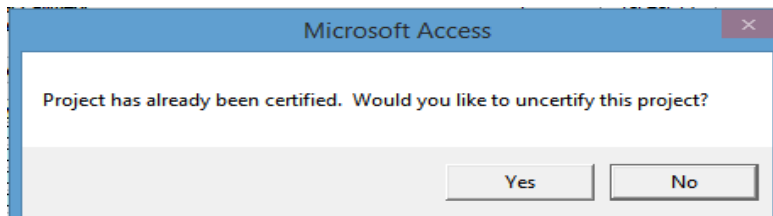
Choose to certify principal or entire balance and check any boxes needed.

Select a report from the drop down that will print after the certify button is clicked.

Click to Certify when ready.



To un-certify the project choose “project certification” from the project cycle checklist.



Choose yes to un-certify.

Project Inquiry (view, inquiry, project)

Project# 99646

Search* [] Status: Levied Estimated Cost: \$300,000.00
 Project Name: MAIN ST SIDEWALK Work Order: [] Levy Amount: \$300,000.00
 Project Type: Sidewalk Actual Cost: []
 Property Billed: 5 Years of Levy: 5 Amount Assessed: \$300,000.00
 Equal Annual Payment Date of Levy: 10/20/14 Amount Paid: []
 Equal Semi-Annual Payment Years Remaining: 5 Balance: \$300,000.00

Description/Note	Assessment Roll	Cost Detail	Penalty/Interest	Receipt Distribution		
Property Parcel ID	Primary Owner	Original	Remaining	Principal	Interest	YTD Certified
271331500	LUNDGREN, DONALD A/ETAL	\$60,000.00	\$48,000.00	\$12,000.00	\$1.78	\$12,001.79
271339000	GROGAN/MARYANN E & STEP	\$60,000.00	\$48,000.00	\$12,000.00	\$1.78	\$12,001.79
271345000	LARSON, BRIAN W & KAREN L	\$60,000.00	\$48,000.00	\$12,000.00	\$1.78	\$12,001.79
271346000	PETERSON, VICTOR/ETUX/TF	\$60,000.00	\$48,000.00	\$12,000.00	\$1.78	\$12,001.79
271358000	JONES, HARRIET L & ERMAL A	\$60,000.00	\$48,000.00	\$12,000.00	\$1.78	\$12,001.79

Buttons: Add Property, Remove Property, More Property Info, More Owner Info, More Assessment Info, Delete Entire Project, Report Project Info, Project Cycle Checklist

From the project inquiry screen you can view all the assessed parcels, original balance, remaining balance, principal, and interest.

More property & owner info- Click on a specific parcel and then choose more owner info or more property info to display more detailed information.

Report project info- prints a nice report with most information that is on this screen.

More Assessment Info- select a parcel and choose more assessment info the assessment screen for that parcel and project # will be displayed.

Assessment

Search* [] Status: Regular Project #: 99635
 Owner: Jefferson, Morgan PIN: 88-9944-344 2232 Unlisted Units: No
 Property Address: 8217 38th Ave N Your City, MN 55337 Original Assessment: [] Multiplier: 1
 Balance Remaining: \$0.00 County: []

Cost/Unit	Billing Info	Payment History	Notes	
	Current Due	YTD Paid	Prior Year Paid	Total Paid
Principal	\$0.00	\$0.00	\$0.00	\$0.00
Penalty	\$0.00	\$0.00	\$0.00	\$0.00
Interest	\$0.00	\$0.00	\$0.00	\$0.00
Daily Interest	\$0.00	\$0.00	\$0.00	\$0.00
Fee <input type="checkbox"/> Exempt	\$0.00	\$0.00	\$0.00	\$0.00
	YTD	Total Certified	Total Paid	Balance
Certified	\$0.00	\$0.00	\$0.00	\$0.00
Uncertified	\$0.00	\$0.00	\$0.00	\$0.00

Buttons: Delete Assessment, Print Invoice

This screen can also be accessed from view, inquiry and assessment.

This assessment screen allows you to view YTD and Prior year information and other important information.

Choose payment history tab to view a transaction history of payments towards this assessment.

Viewing Assessments On A Property & Owner

Property 8217 38th Ave N

Search* 8217
 House/Street 8217 38th Ave N
 Apt/Desc
 Print Label
 Envelope
 Your City MN 55337-
 Owner Jefferson, Morgan
 PIN 88-9944-344 2232

Status Open Charges \$31,904.75

Notes

Click to Locate Picture of Property

Property Parcel ID	Project	Status	Interest	Principal	Amount Due
88-9944-344 2232	99635 - Alley Repair	Regular	\$0.00	\$0.00	\$0.00
88-9944-344 2232	99636 - Sidewalk	Regular	\$0.00	\$0.00	\$0.00
					\$0.00
					\$0.00

More On Assessment More On Project

Delete Property Create Assessment Certificate Report Assessment Info Print Options

From the main screen choose view, inquiry, then property or owner. Use the search to look up a property or owner and then click on the assessment tab.

This will show all assessments past and present on the property or the owners properties as well as any balance due.

More On Project- click on a specific project and then choose “more on project” and the project screen will be displayed.

More On Assessment- click on a specific project and then choose “more on assessment” and the assessment screen will be displayed for that parcel. More detailed information is accessible here like payment history.

Report Assessment Info- will display all assessments for this parcel on a report and also show remaining balances. (only available from property inquiry)

Create Assessment Certificate- Shows all pending charges on this property

Pending Charges

Listed below are current charges pending against the property. Make any adjustment necessary before creating the Assessment Certificate

<input checked="" type="checkbox"/>	Building Permit	\$1,250.00	Issued
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Issued
<input checked="" type="checkbox"/>	Building Permit	\$145.00	Pending
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Issued
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Issued
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Pending
<input checked="" type="checkbox"/>	Building Permit	\$150.00	Pending
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Issued
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Pending
<input checked="" type="checkbox"/>	Basement Finish	\$250.00	Pending
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Pending
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Pending
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Issued
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Issued
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Issued
<input checked="" type="checkbox"/>	Basement Finish	\$1,350.00	Pending

Add Admin Fee Total Pending Charges \$31,679.75 Create Certificate

Uncheck any items to not include on the certificate and then click “create certificate” when ready.

SPECIAL ASSESSMENT CERTIFICATE

STATE OF MINNESOTA
 COUNTY OF CHIPPEWA
 CITY OF MONTEVIDEO

02/25/04

I, LaVonne B. Sundlee, acting City Clerk in and for the City of Montevideo, Minnesota do hereby certify that the following charges are pending against the below described property.

Parcel #: 701910425
 Legal Description: LOT 6, BLOCK 4, HORIZON TRAILS ADDITION

Pending Charges:
 HORIZON TRAILS BUY-IN PROJECT \$8,466.75
 Building Permit \$25.00
 Assessment License (bid idea) \$15.00
 Utility Account 01-0000015-00 \$33.60
 Property Tax \$3,156.29

Total charges: \$11,696.64

LaVonne B. Sundlee, City Clerk

REPORT WRITER

To access reports for assessments, click on view, then report writer.

Choose the assessments category and choose an available report. To create your own report simply right click on a report and choose new.

*Please see the Banyon report writer manual on how to create new reports, modify existing, and use report filters.

Select a Report Category/Collection from the left panel then select a Report from the right panel. Click Print/Preview button to generate the report. Right click on either panel for more options.

Category/Collection:	Report:	Last Modified	Last Run	Runs
*Assessments	*Account Balances	5/15/2014	5/15/2014	0
*Cemetery	*Assessment By Project	5/15/2014	5/15/2014	0
*Cemetery Deed	*Assessment History By Parcel	5/15/2014	5/15/2014	0
*Cemetery Genealogy	*Assessment Remaining Balance	5/15/2014	5/15/2014	0
*Cemetery Maintenance	*Assessment Roll	5/15/2014	5/15/2014	0
*Cemetery Permissions	*Assessment Roll By Project	5/15/2014	5/15/2014	0
*Cemetery Space	*Certified Interest	5/15/2014	5/15/2014	0
*Contractors	*Certified Register By Project	5/15/2014	5/15/2014	0
*Customers	*Certified Report	5/15/2014	10/23/2014	2
*Department Check	*County Certified Report	5/15/2014	5/15/2014	0
*Fees	*County Certified Report #2	5/15/2014	5/15/2014	0
*Inspections	*Project Assessment Roll®	5/15/2014	10/22/2014	6
*License - Pet				
*Licenses				
*Permit Itemized Fees				
*Permits				
*Projects				
*Properties				
*Properties/Owners				
*Property Footage Info				
*Receipt Distributions				
*Receipts				
*Receipts - Pet				

Global Settings Preview Selected Report

SETTING UP VIOLATIONS or CODE ENFORCEMENT (OPTIONAL TO USE)

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 View, System Modules, 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 type="checkbox"/> 1st	1 Day		1	1st Notice
<input type="checkbox"/> 2nd			1	2nd Notice
<input type="checkbox"/> 3rd			1	3rd Notice
<input type="checkbox"/> 4th			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.

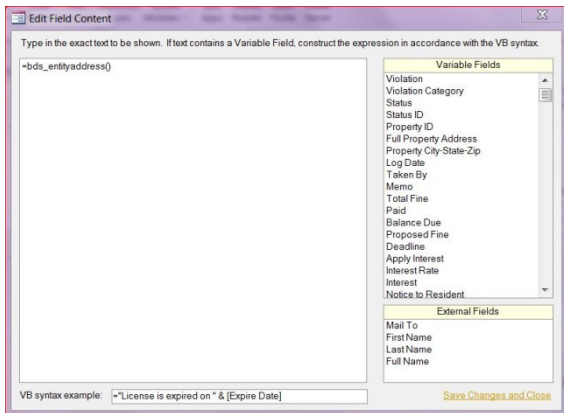


Logo Insertion: The first step is to decide if you want a logo to print out on the notices or you can use letterhead as well. To insert a logo, click on the logo check box on the right and logo box will appear. Next, drag the logo box to where you want it to appear and then click to place. Next, the 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 2nd, 3rd or 4th 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 4th 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 4th 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  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.



Enter Violation ID

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.

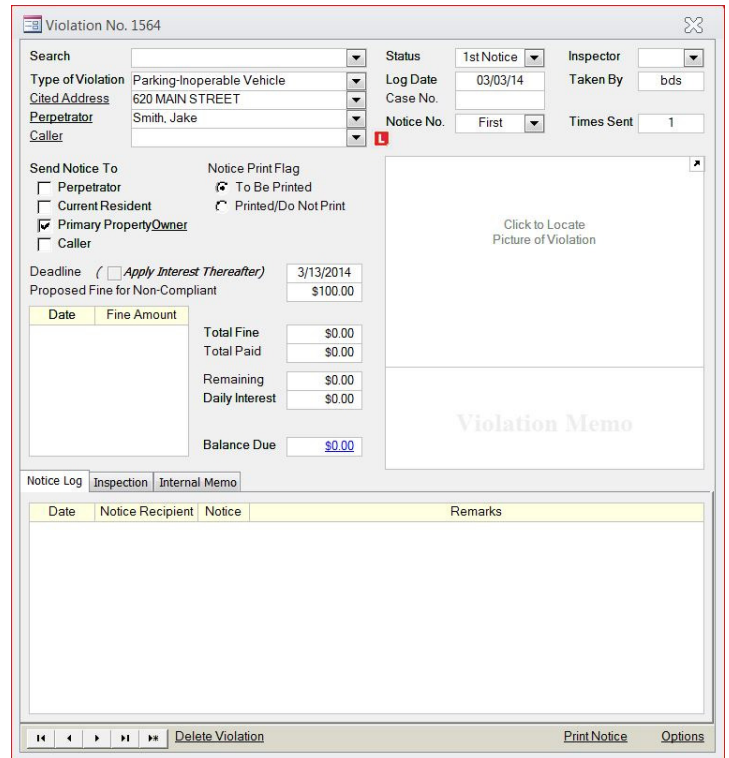
Deadline & Fine: The compliance deadline and amount will also be filled in based on the setup information, but can be edited on this screen.

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.



Violation No. 1564

Search:

Type of Violation: Parking-Inoperable Vehicle

Cited Address: 620 MAIN STREET

Perpetrator: Smith, Jake

Caller:

Status: 1st Notice

Log Date: 03/03/14

Case No.:

Notice No.: First

Inspector:

Taken By: bds

Times Sent: 1

Send Notice To:

- Perpetrator
- Current Resident
- Primary Property Owner
- Caller

Notice Print Flag:

- To Be Printed
- Printed/Do Not Print

Deadline: Apply Interest Thereafter 3/13/2014

Proposed Fine for Non-Compliant: \$100.00

Date	Fine Amount

Total Fine: \$0.00

Total Paid: \$0.00

Remaining: \$0.00

Daily Interest: \$0.00

Balance Due: \$0.00

Click to Locate Picture of Violation

Violation Memo

Notice Log | Inspection | Internal Memo

Date	Notice Recipient	Notice	Remarks

Navigation: Delete Violation Print Notice Options

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 processes, 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
1558 - Improper Outside Storage/Rt	400 FOREST STREET EAST	2nd Notice	02/22/14	\$0.00	\$150.00
1559 - General		1st Notice	02/18/14	\$0.00	\$0.00
1560 - Parking-Inoperable Vehicle		1st Notice	02/27/14	\$100.00	\$250.00
1561 - Work without Permit	10 WOODRIDGE DRIVE	1st Notice	02/17/14	\$0.00	\$500.00
1562 - Parking-Unlicensed Vehicle	100 FOREST STREET WEST	2nd Notice	02/22/14	\$625.00	\$100.00

Proposed fine will be added to current due for all violations not meeting compliance by deadline. The deadline will be extended if applicable as defined by the type of violation. System will also set to have further notices be printed. [Expire Above Violations](#)

This screen will show the changes from the expire routine and the new status and fines will show. When you close out you will be asked to “mark all shown violations as printed” and say yes.

ADDING VIOLATIONS TO MULTIPLE PROPERTIES

To do, click on the View tab, Periodic Processes, Violation, and then Create Multiple Violations.

Select what type of Violation from the drop down in the Citation field. You can then pick your selection by street name.

In the Selection screen, pick what addresses you want to add the violation to, and then select Append to List.

Next, select Create Violations, on the bottom right hand corner of screen.

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.

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** \$25.00 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

13-May-07 - 5/7/2013 4:39:11 PM

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

Entry Description	Amount	Check #	Remark	Customer
Pet Tag No. 0834	\$10.00		136 WALNUT STREET SOUTH	SEGNA, LAWRENCE M &
Pet Tag No. 0835	\$10.00		136 WALNUT STREET SOUTH	SEGNA, LAWRENCE M &
Permit B-130064	\$130.00		990 LACY COURT	
Permit Z-130087	\$50.00		119 CHESTNUT STREET SC	
Permit Z-130085	\$50.00		956 IVY HILLS ROAD	
Violation 1558 - Improper Outside Storage/Rubbish	\$150.00		400 FOREST STREET EAST	SKELLEY, MATTHEW & F
Violation 868 - Parking-Unpaved Surface	\$500.00		802 FOREST STREET WEST	SCHAAF, STACY
*	\$0.00			

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.**

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.

13-May-07 - 5/7/2013 4:39:11 PM

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

Entry Description	Amount	Check #	Remark	Customer
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Permit B-130064	\$130.00		990 LACY COURT	
Permit Z-130087	\$50.00		119 CHESTNUT STREET SC	
Permit Z-130085	\$50.00		956 IVY HILLS ROAD	
Violation 1558 - Improper Outside Storage/Rubbish	\$150.00		400 FOREST STREET EAST	SKELLEY, MATTHEW & F
Violation 868 - Parking-Unpaved Surface	\$500.00		802 FOREST STREET WEST	SCHAAF, STACY
*	\$0.00			

Receiving Options Delete This Batch Receipt Total \$900.00 Preview Report Post Above Receipts

Receiving Options: This allows you to choose what information is displayed by default in the entry description and remark.

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.

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.

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

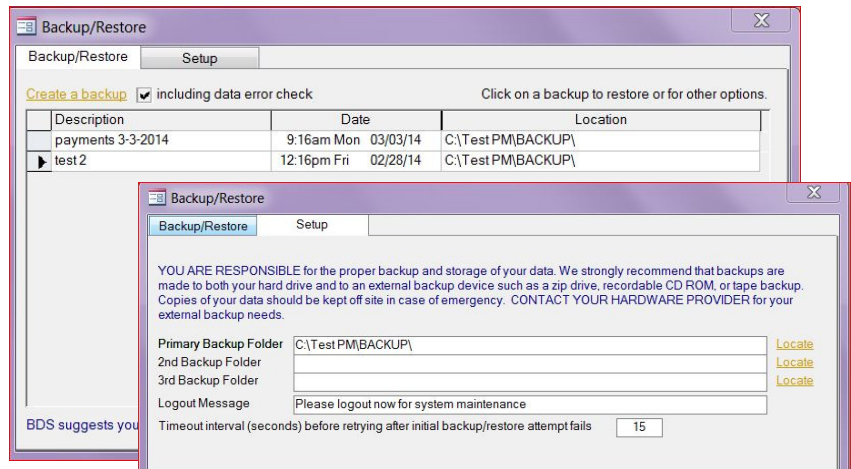
The first step is to click on **PREVIEW REPORT** to verify or have a print out of the receipts entered. (This can be recalled again if you do not want to actually print, but simply review on screen)

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

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.

Receipt Distribution

Receipt Batch to distribute to Accounting: 13-May-07

Accounting External Batch to merge into (optional):

Summary by Account (selected)
 Summary by Item
 Detail

Description	Distributed Account	Amount
Violation 868 - Parking-Unpaved Surface		\$500.00
Violation 1558 - Improper Outside Storage/Rub		\$150.00
Pet Tag No. 0835	R 101-000000-032240	\$10.00
Pet Tag No. 0834	R 101-000000-032240	\$10.00
Permit B-130064	R 101-000000-032210	\$75.00
Permit B-130064	R 101-000000-032210	\$50.00
Permit B-130064	G 101-021712	\$5.00
Permit Z-130087	R 101-000000-034103	\$50.00
Permit Z-130085	R 101-000000-034103	\$50.00

Print

Click the amount to distribute to Fund Accounting: \$900.00

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 Print on the bottom left corner to 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.

Batch Name	Created	Amount	Posted
▶ 10-Apr-05	4/5/2010	\$150.50	4/6/2010 ▲
10-Apr-06	4/6/2010	\$152.47	4/7/2010 ☰
10-Apr-08	4/8/2010	\$597.37	4/8/2010
10-Apr-09	4/9/2010	\$143.15	4/12/2010
10-Apr-13	4/13/2010	\$12,436.71	4/14/2010
10-Apr-14	4/14/2010	\$11,639.18	4/15/2010
10-Apr-15	4/15/2010	\$100.00	4/15/2010
10-Apr-16	4/16/2010	\$350.50	4/16/2010
10-Apr-19	4/19/2010	\$502.00	4/19/2010
10-Apr-20	4/20/2010	\$390.50	4/21/2010
10-Apr-22	4/22/2010	\$11,383.69	4/22/2010
10-Apr-23	4/23/2010	\$251.40	4/26/2010
10-Apr-26	4/26/2010	\$326.85	4/26/2010 ▼

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.

REPORT WRITER

To access reports for violations, click on view, then report writer.

Choose the violations category and choose an available report. To create your own report simply right click on a report and choose new.

*Please see the Banyon report writer manual on how to create new reports, modify existing, and use report filters.

Category/Collection:	Report:	Last Modified	Last Run	Runs
*Assessments	Violations (FROM-TO) for Dep. Reports			
*Cemetery	Violations (Type)			
*Cemetery Deed	*Pet Complaint Log	5/15/2014	5/15/2014	0
*Cemetery Genealogy	Abatements			
*Cemetery Maintenance	OPEN VIOLATIONS			
*Cemetery Permissions	Open Violations (All)			
*Cemetery Space	OPEN VIOLATIONS (exc. Abatements/Citations)			
*Contractors	Summary of violation			
*Customers	Violation Balance Due			
*Department Check	Violation Complaint Log 1			
*Fees	Violations 1			
*Inspections				
*License - Pet				
*Licenses				
*Permit Itemized Fees				
*Permits				
*Projects				
*Properties				
*Properties/Owners				
*Property Footage Info				
*Receipt Distributions				
*Receipts				
*Receipts - Pet				
*Violations				
Permit®				
Violation®				
*All Reports				

Global Settings Preview Selected Report ▼