Banyon Data Systems

PROPERTY MANAGEMENT USERS GUIDE

Permits Module

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.

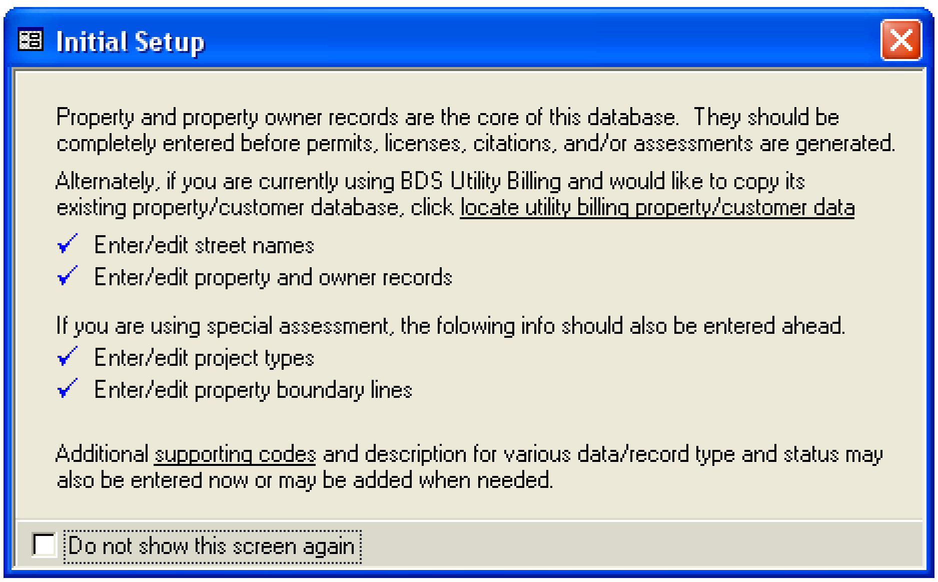
This user guide is a general “how-to” for Banyon Data Systems Special Assessment software. Training is encouraged to enhance the learning process for this product. Please refer to the BDS Read Me First Guide for passwords and Backup/Restore procedures.

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.



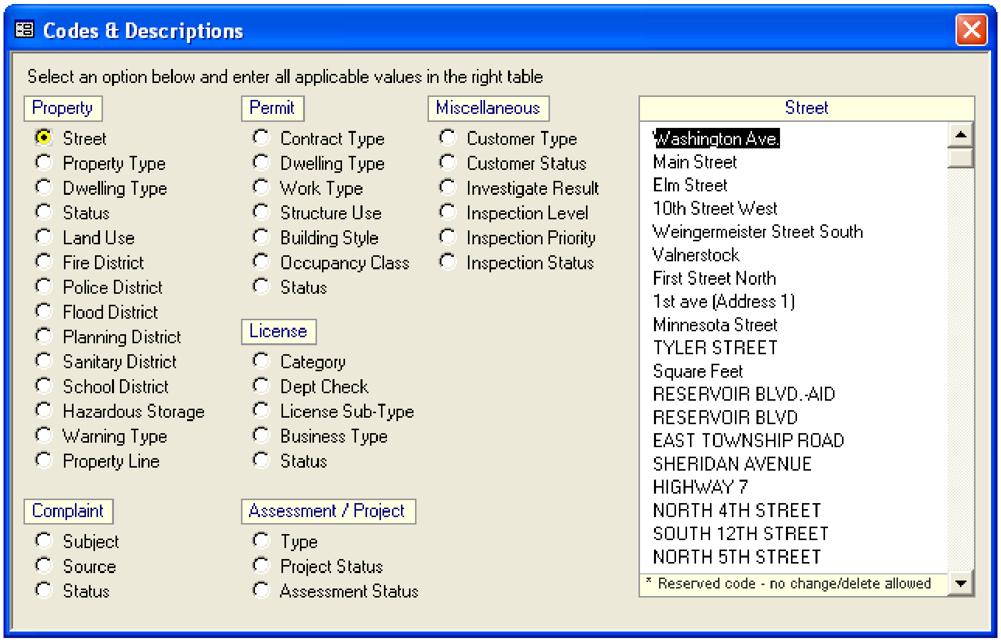
The four items shown above with blue check marks (indicating complete or in progress) are crucial and work as the base for the rest of the data growth.

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.



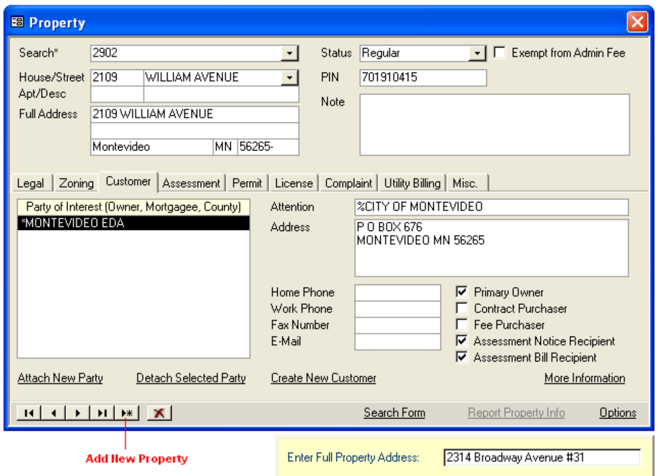
Setup of Codes and Descriptions is a collection of valid data items to be used in property records and permits.

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.



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.

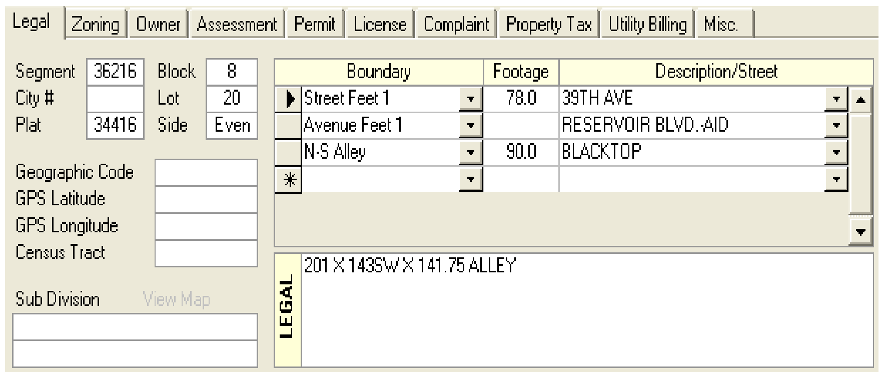
If you are on the Customer tab and wish to create the Customer/owner record for this property, click Create New Customer/owner. If you would like to attach an existing owner or additional owner, click to Attach. To remove an attached Customer, select the owner on the list and click Remove Selected Customer.

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

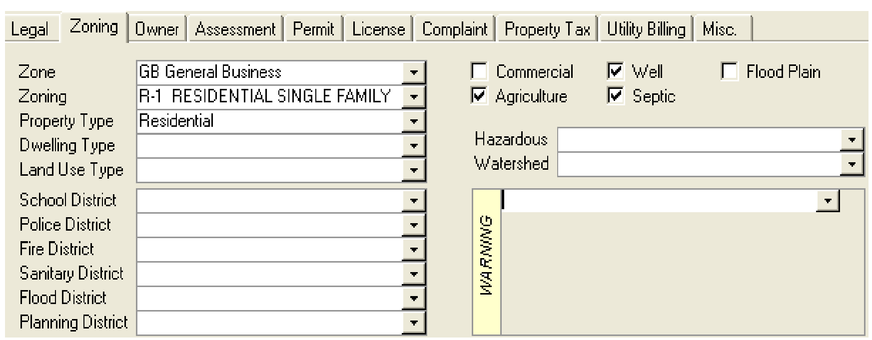
To access the Inquiry Screen, click on the View menu option at the top and select Inquiry and choose the Property inquiry.

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.



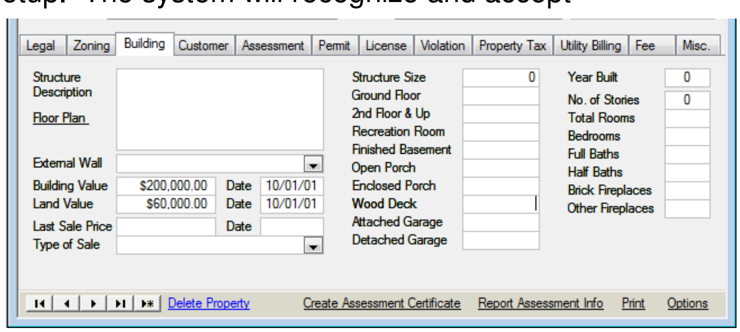
The **Property Footage** table must have the correct footages. Adjustment to footage can be made individually by assessment.

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.

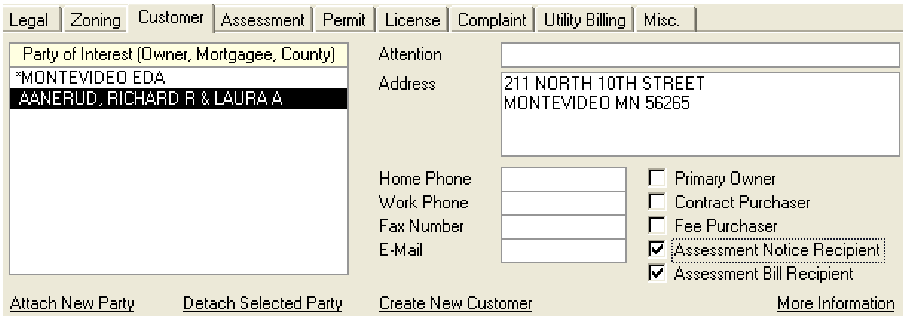


Zoning tab provides additional space for zoning and district information. The Warning list may have virtually unlimited entries. These fields may be used for assessment selection or for permit and/or license warnings. Available values are pre-defined in the Codes and Descriptions Setup. The system will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

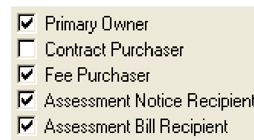
Building tab- attach a floor plan, values of building and land, sale prices, size, year built, bedrooms, baths & more!



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.

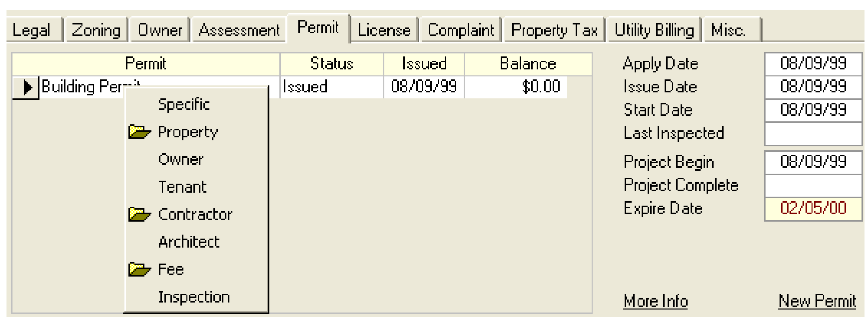


The primary entry is marked with an asterisk (*). The information display to the right of the list box pertains to the highlighted customer/owner. Address and Phone can only be changed via the Customer screen. You can, however, check the option boxes for each listed customer/owner. To change primary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

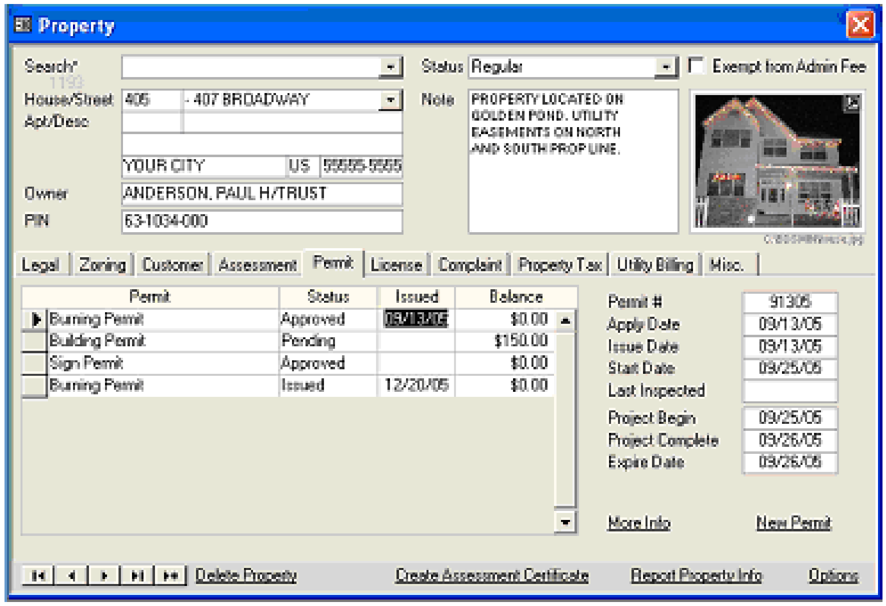


To maintain the customer/owner list box, use Attach Customer, Remove Selected Customer, and Create New Customer. To learn more on the selected owner, click on More Information.

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.



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.

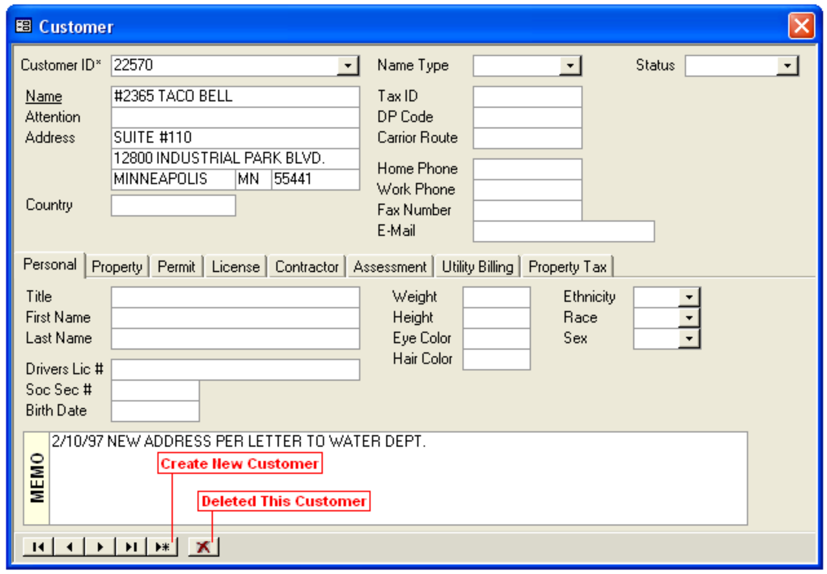


To attach a picture with a property, click on the box and browse your files until you find the correct picture.
NOTE: The picture must be saved in .jpg or .bmp format.

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.



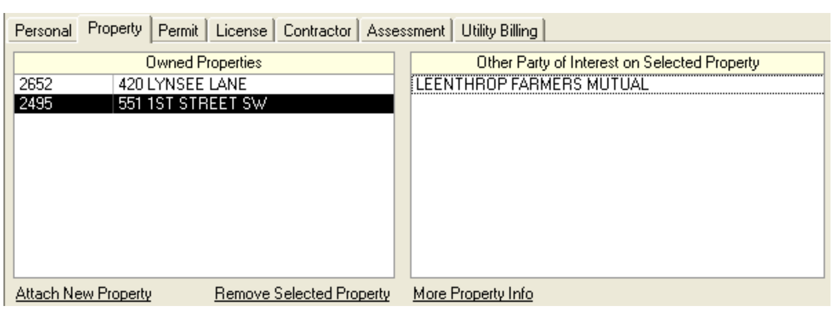
The customer screen or record has basic information on customer address and phone. The naming format for personal names is last name comma first name. If there are two lines for the address, put the street address on the first line. This will improve the system search. To search for a customer, in the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

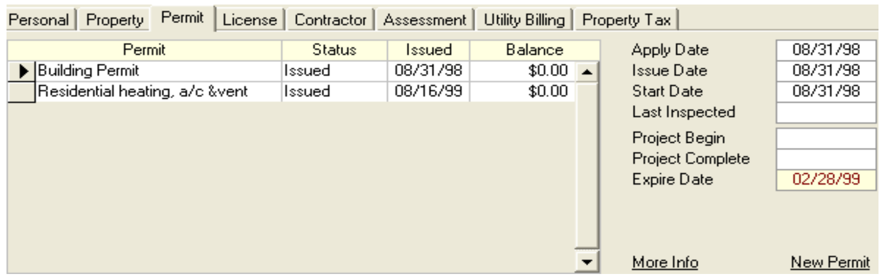
The bottom half of the customer screen has additional information pertained to the displayed customer record.

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

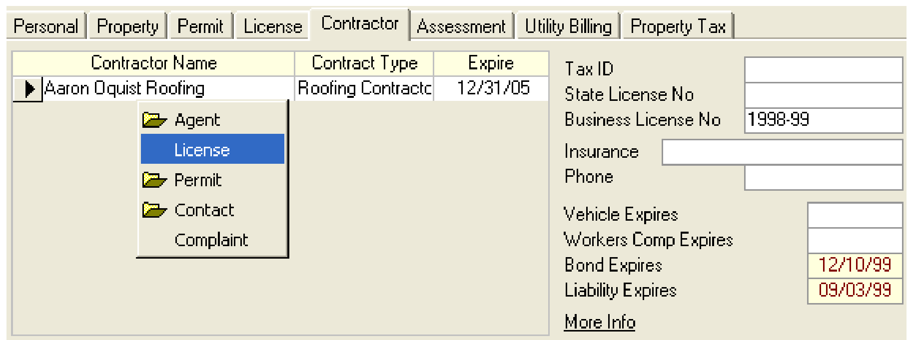
The **Property tab** lists all properties associated with this customer. The customer list shows other owners of the currently highlighted property. Additional properties can be added by a left clicking on Attach New Property. If the selected property was sold and needs to be removed from the list, click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



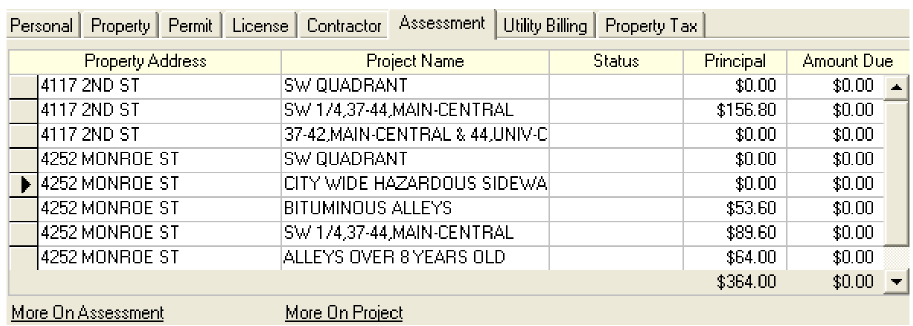
Similar to the Property screen, the **Permit tab** has summary info on all permits applied for the property. You can also start a new permit directly from the Customer screen by clicking on New Permit. A click on a permit will give you shortcuts to their inquiry screen.



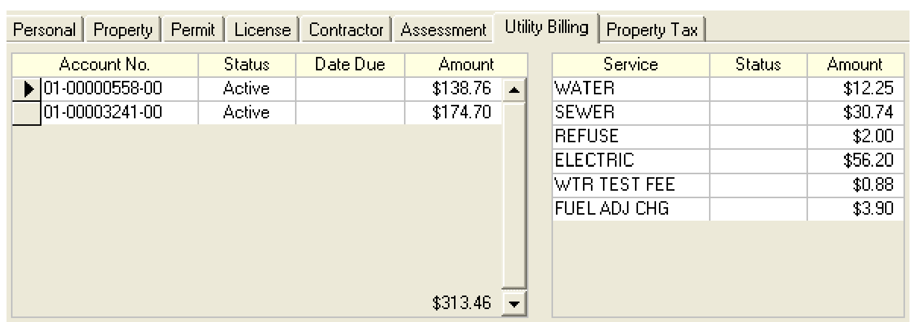
If the customer is a contractor, the **Contractor tab** will give you some basic licensing info on the contractor. Click on More Info for shortcuts to the Contractor Inquiry screen.



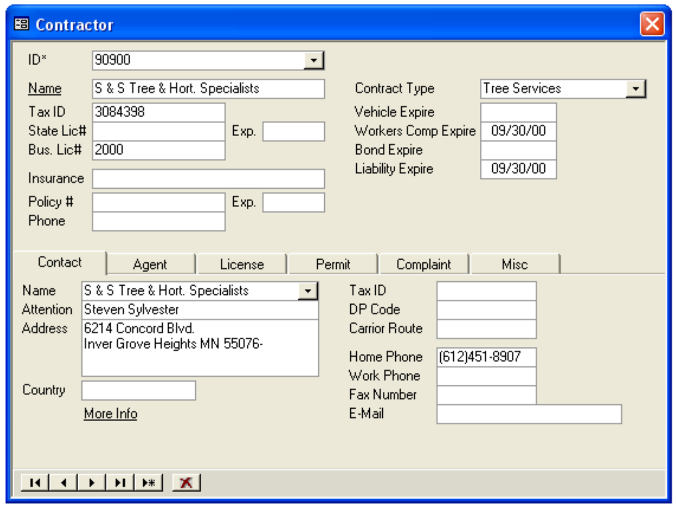
The **Assessment tab** lists all assessments for all properties associated with this customer.



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



CONTRACTOR INQUIRY SCREEN



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

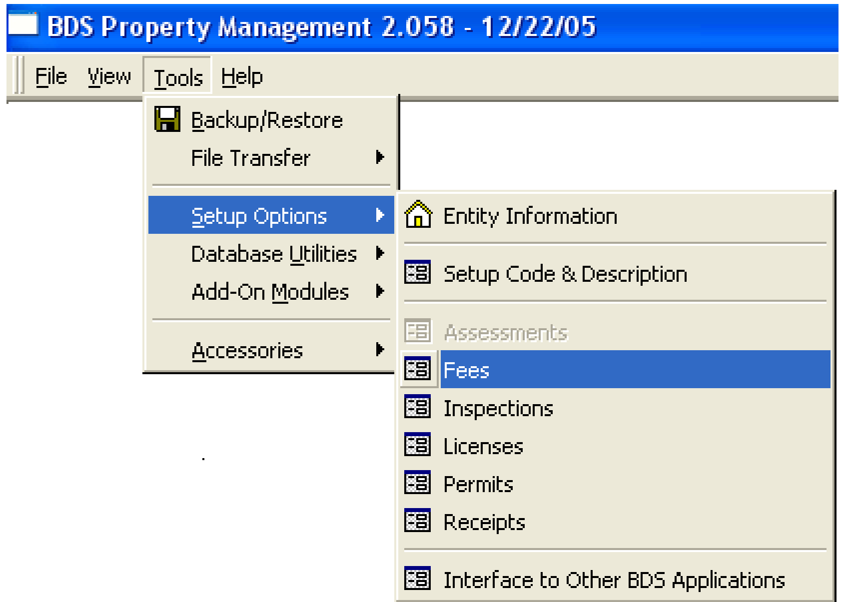
The **contact tab** has information that ties back to the customer screen. The **Agent tab** lists basic employee information such as company position and contact phone #.

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

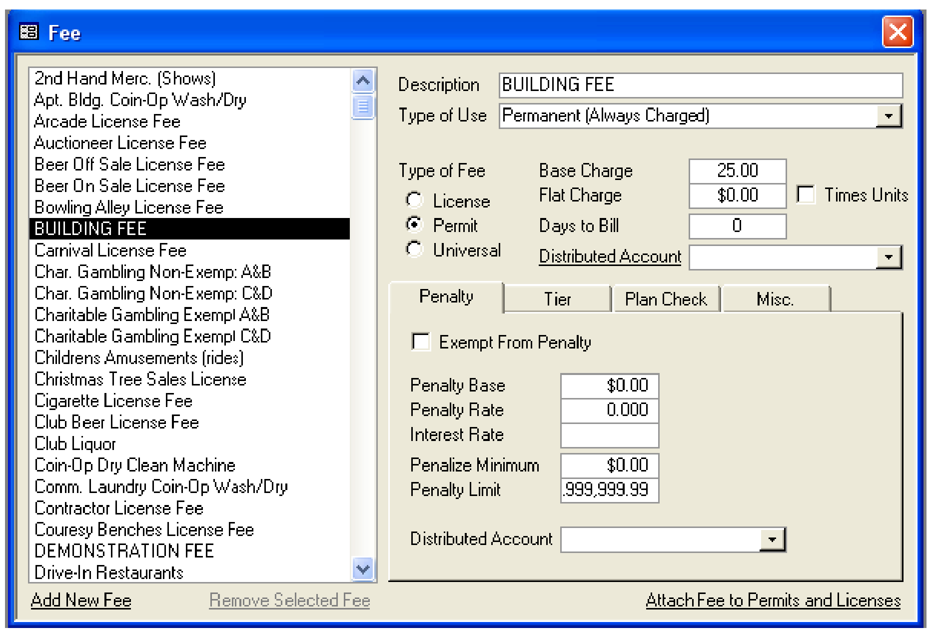
Complaint tab on the contractor screen may be used to log complaints or issues about the contractor.

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.



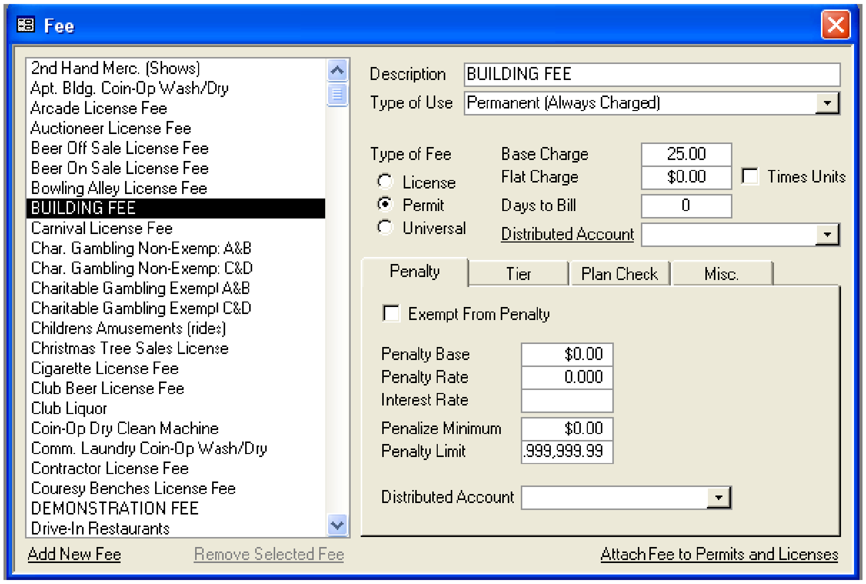
ADD A NEW FEE TYPE

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.

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.

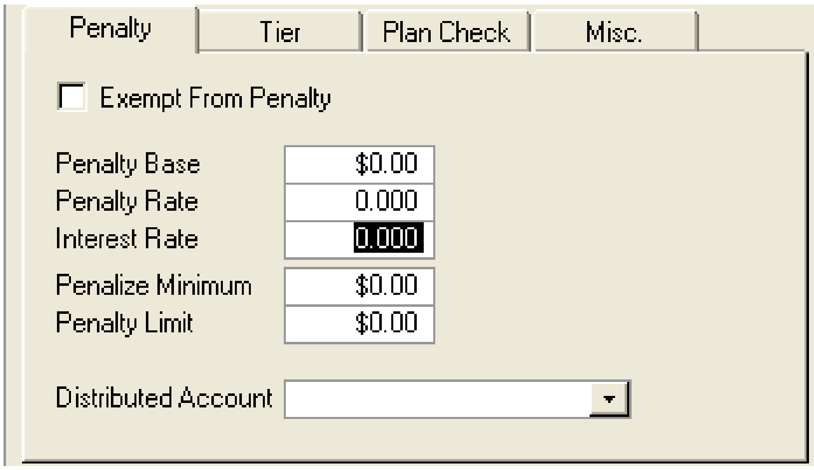
Flat Charge - A flat dollar amount to be charged, which can optionally be multiplied by the number of units on the permit.

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



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.

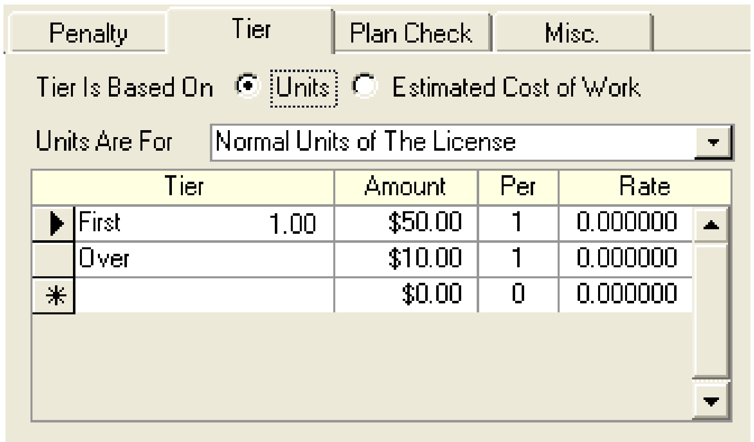
Interest Rate - This is the rate of interest you would like calculated on this permit fee.

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



Tier is Based On - 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

		Amount	**Per**	**Percent**
First	1000.00	25.00	100	7.500000

In this example line:
Column 1 = 1000.00
Column 2 = 25.00
Column 3 = 100
Column 4 = 7.5%

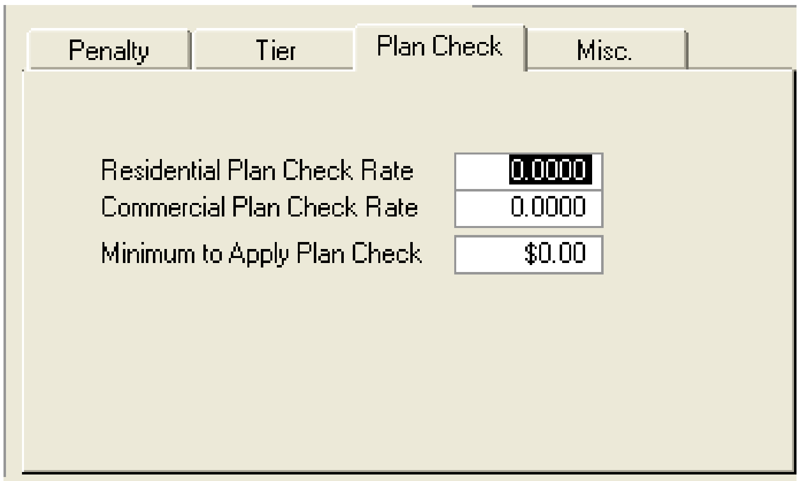
This means that for the first 1000 dollars, 25 dollars will be charged for each 100 dollars. Since there are 10 chunks of 100 in 1000 dollars (10 *100 = 1000), 250 dollars (10 * 25 = 250) will be charged for this line if the estimated cost of the license if at least 1000 dollars.
If the estimated cost of the license is 350 dollars then 100 dollars will be charged or 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 tell 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



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.

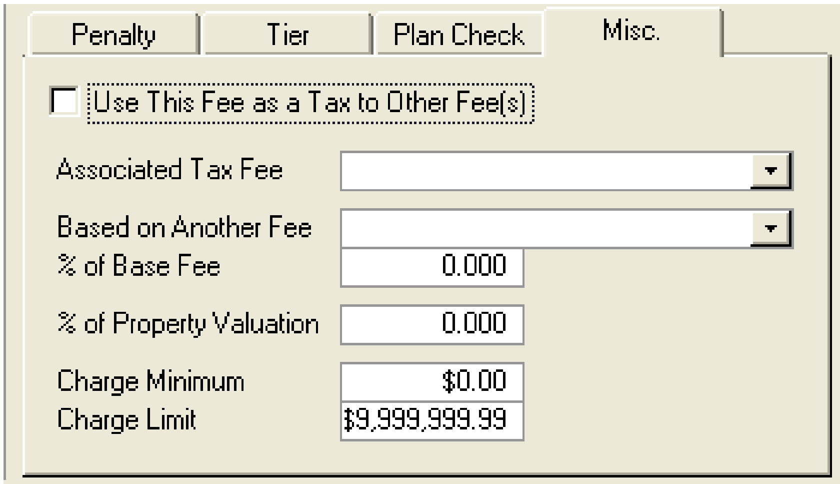
Commercial Plan Check Rate (Optional)

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



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.

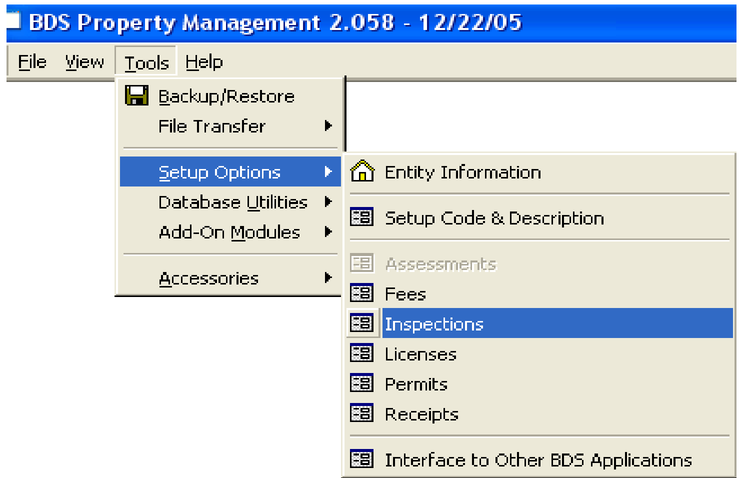
Associated Tax Fee - Use drop down to select fee you will use as a tax/surcharge. Only those fees created as a tax fee will appear in this drop down menu. **NOTE**: You cannot tax a tax fee.

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.

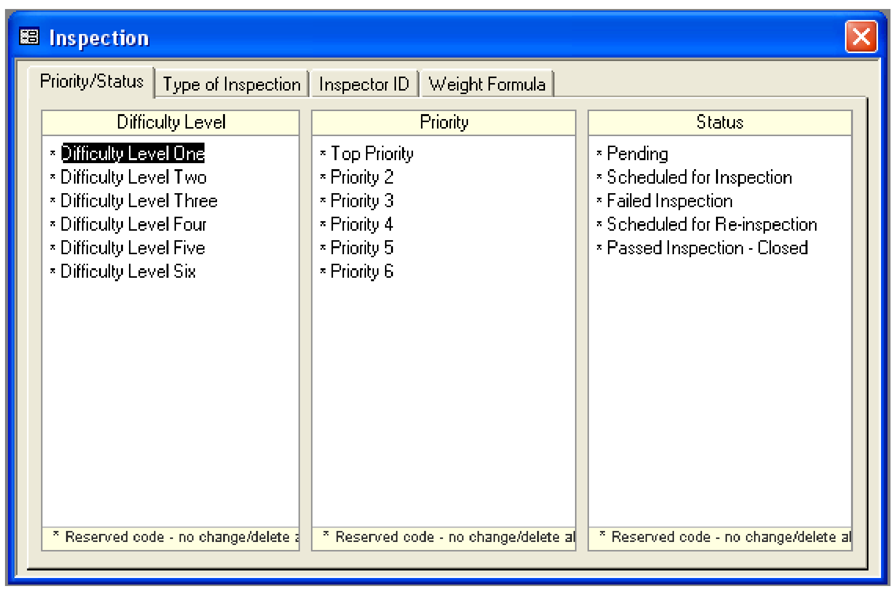
INSPECTION SETUP

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



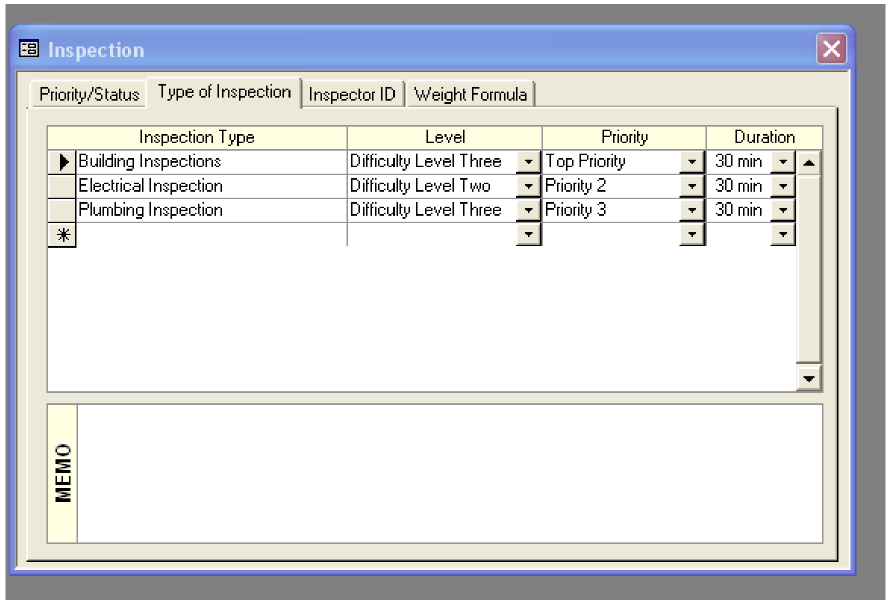
PRIORITY/STATUS TAB

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.



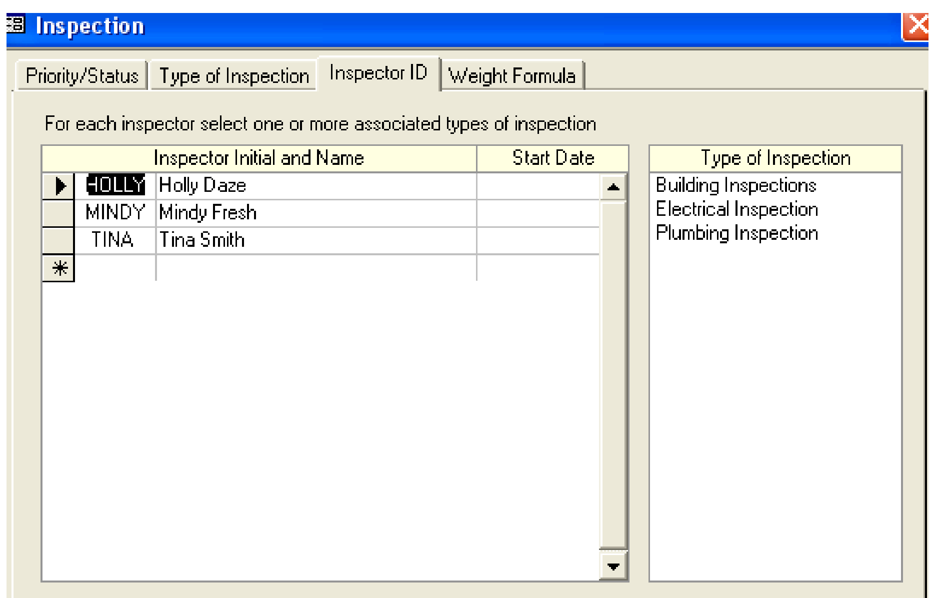
TYPE OF INSPECTION TAB

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.



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.

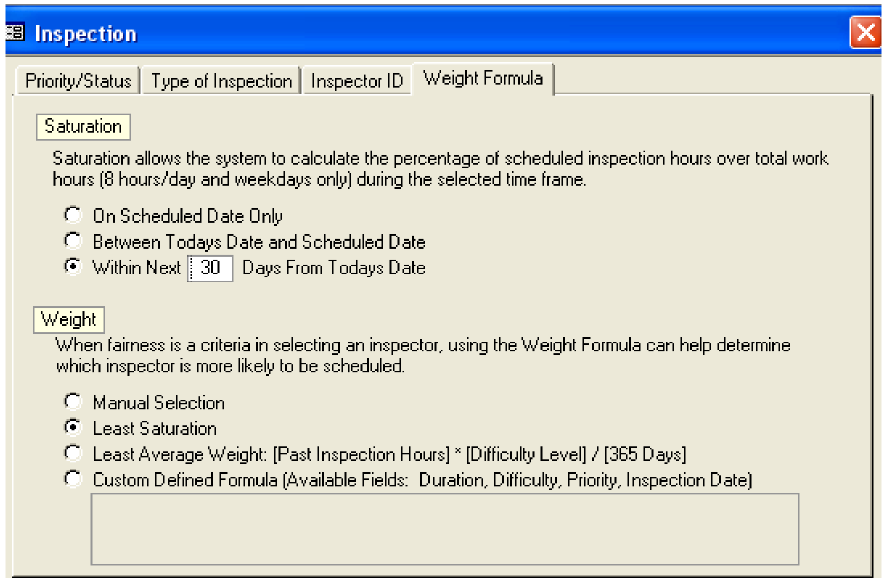


WEIGHT FORMULA TAB

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.

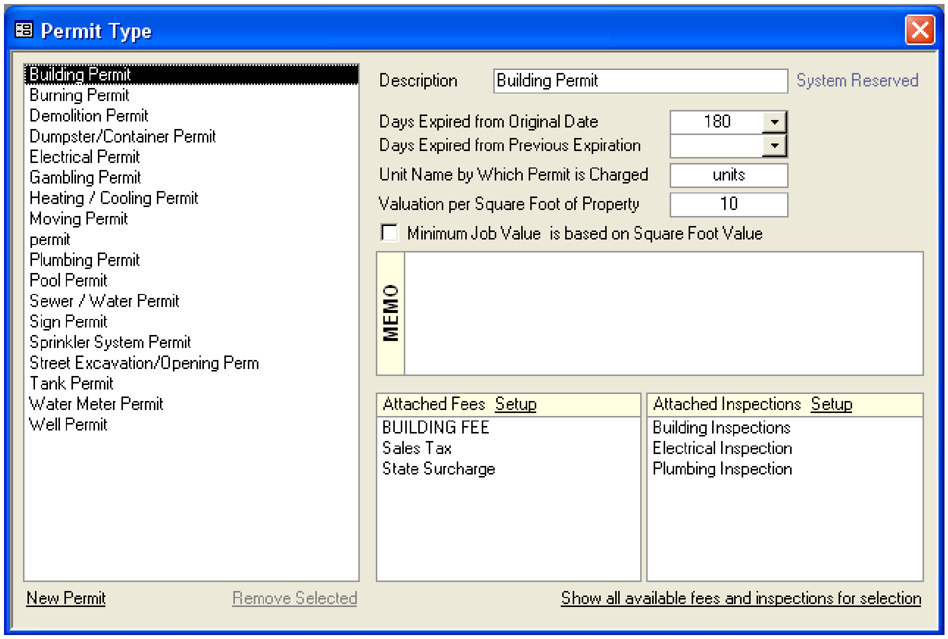


Now that you have your fees and inspections setup, we will move on to creating a permit

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.

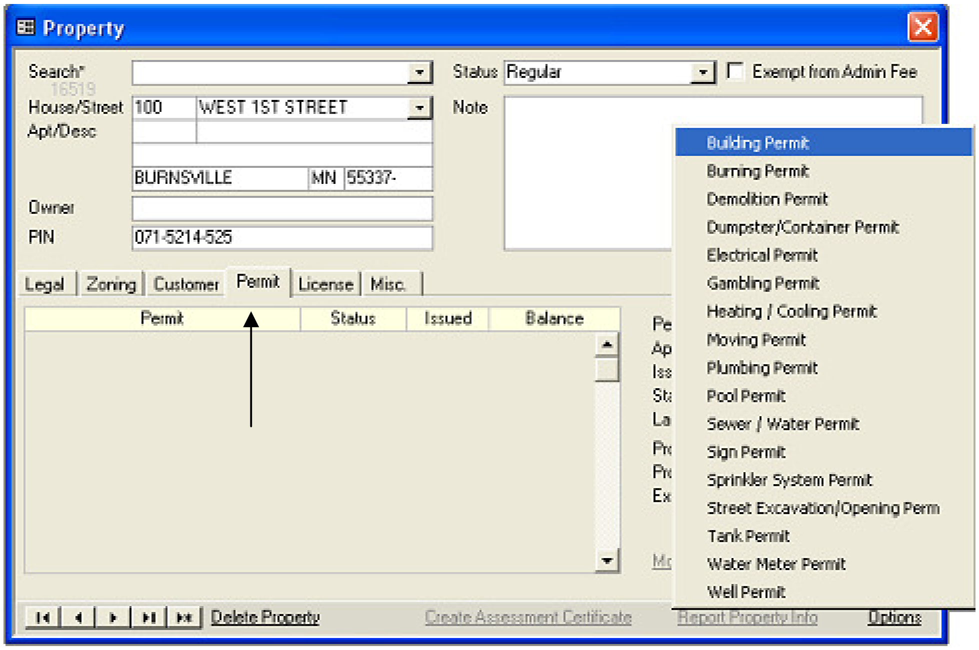
Once the permit has been named, you will need to fill out the information fields on the Permit Type screen.



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

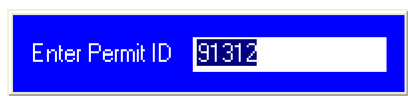


Now that you have created fees, inspections and permits, you are ready to attach them to properties.

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.

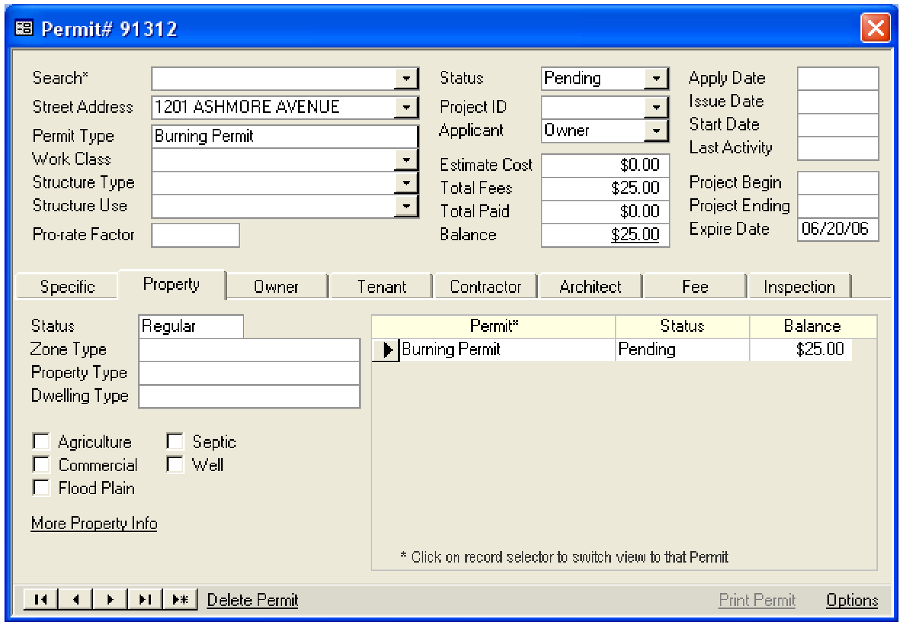
Once you have selected the Permit type from the list, a box will pop up with enter new permit number. You may use the defaulted number or choose your own.

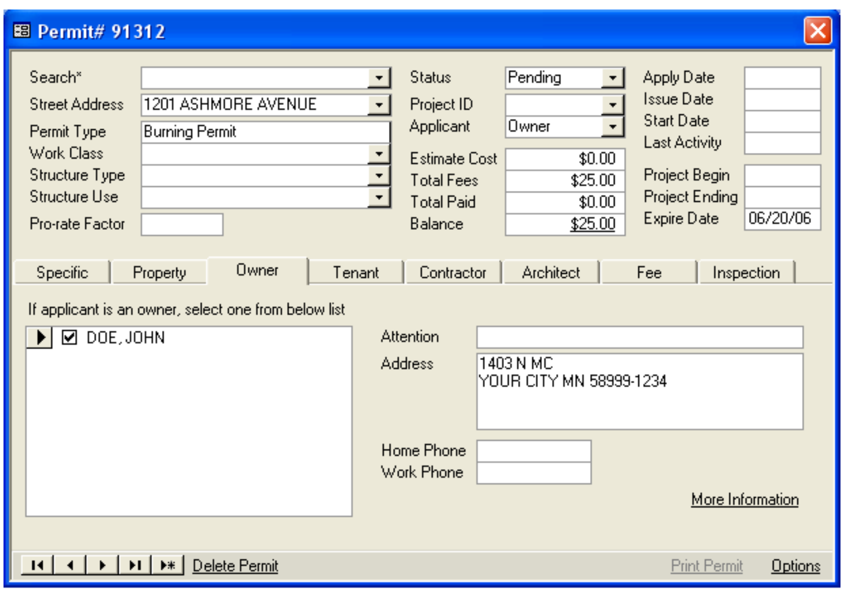


After you have assigned a number to the permit another window will come up with the fees that are associated with this permit type. You can select all of them or choose only the ones you'd like to charge with this permit. Then, click on Attach above selected fees.

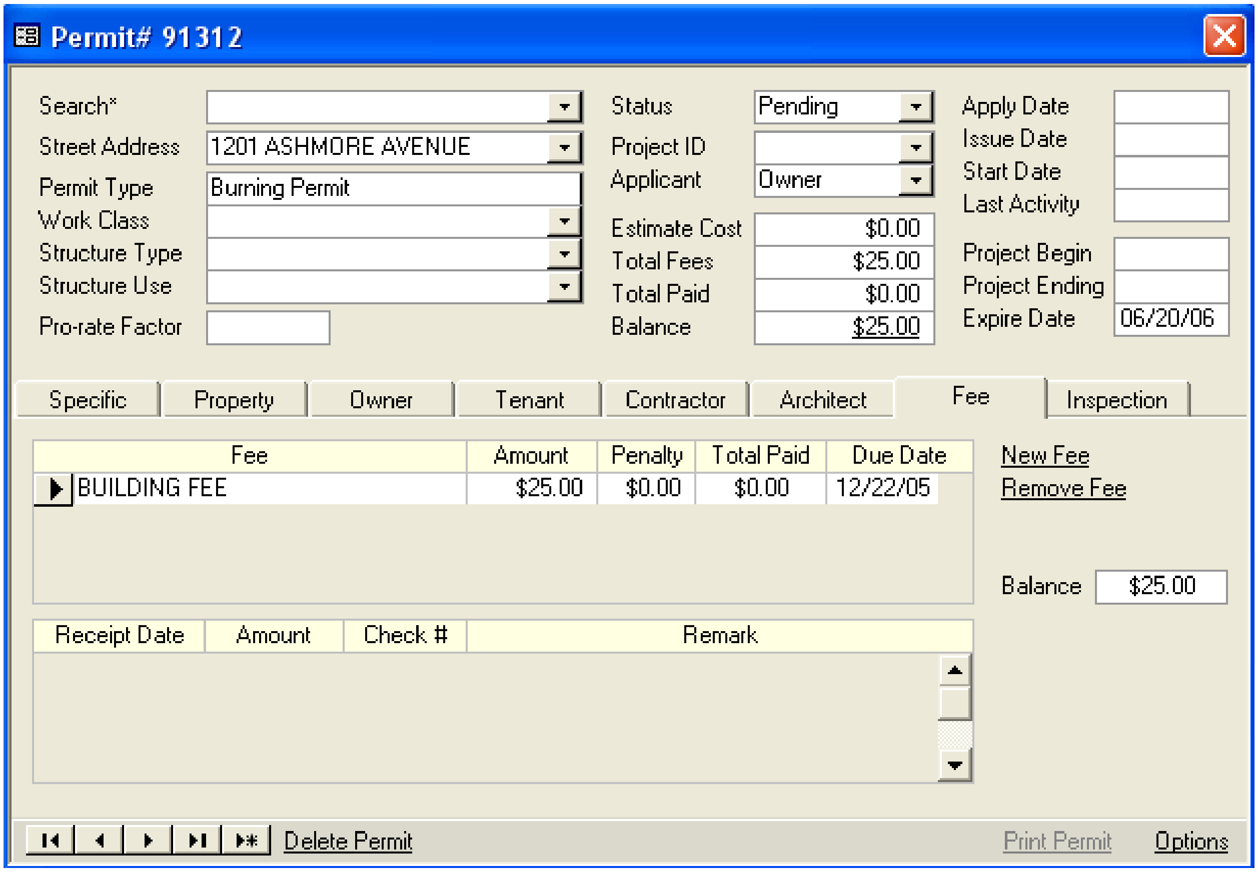
Now, the permit screen has been created for you.

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.





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



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	Permit No.:	**155**
Parcel No.:	70-818-3080	Issued Date:	4/18/2006
Work Valuation:	$50,000.00	Expiration Date	10/15/2006

<u>Owner Infomration</u>

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

<u>Contractor Information</u>

Olson Construction
101 W Burnsville Parkway
Burnsville MN 55337

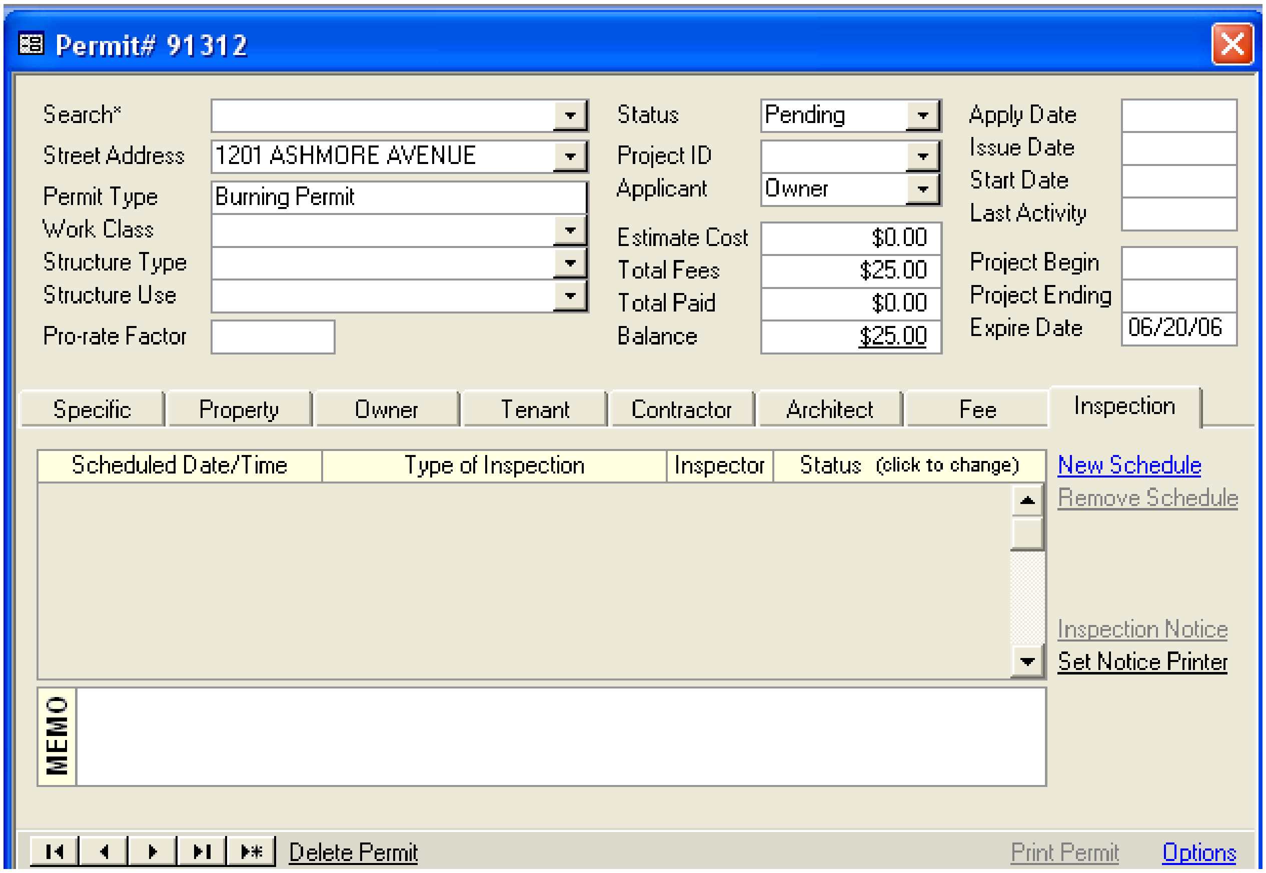
<u>Work Description:</u>

<u>Fee Description:</u>

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

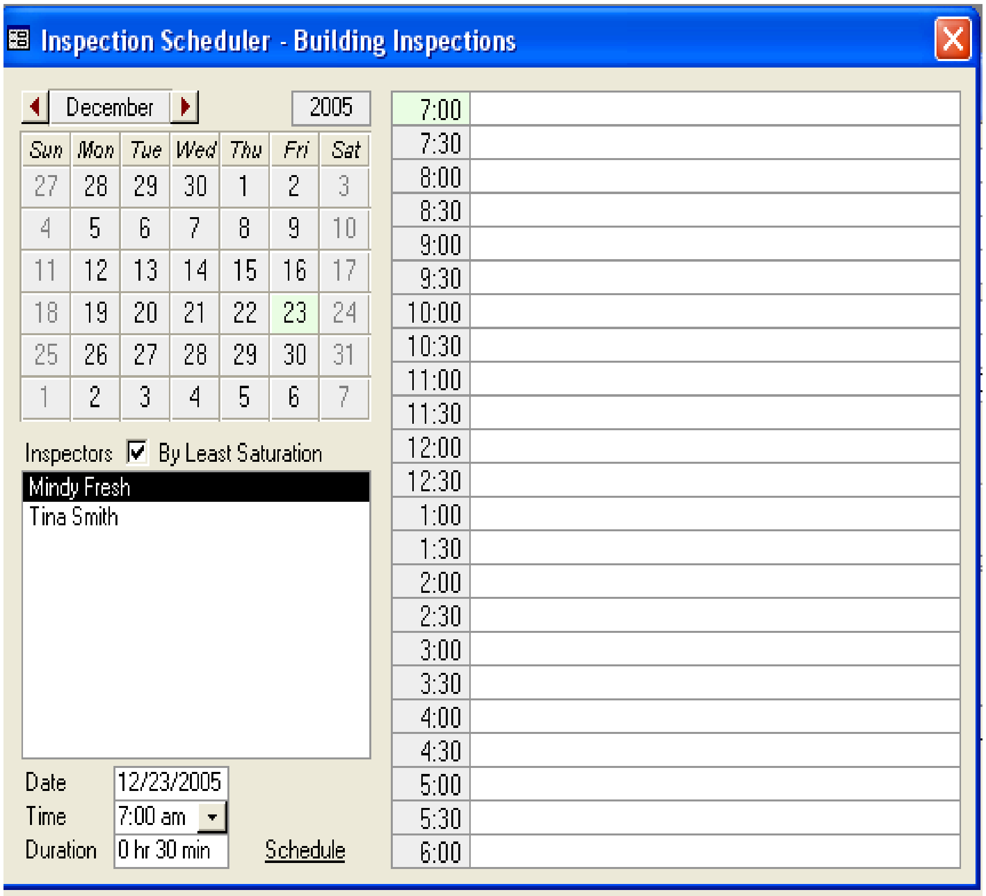
582 1ST STREET SW

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



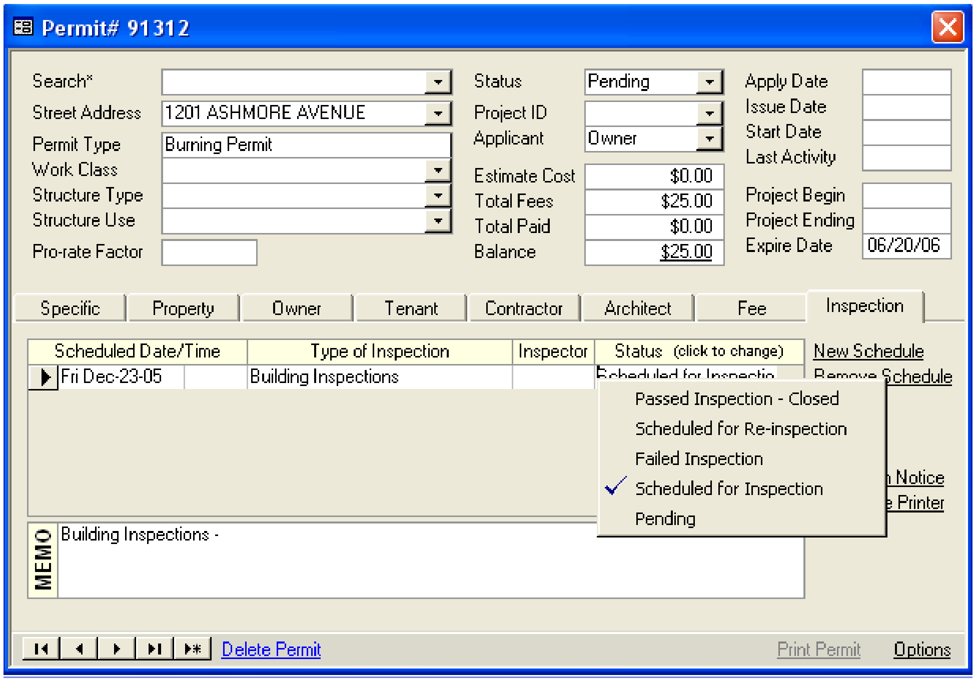
On the inspection tab you can schedule inspections through the software. Do this by clicking on New Schedule.

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.



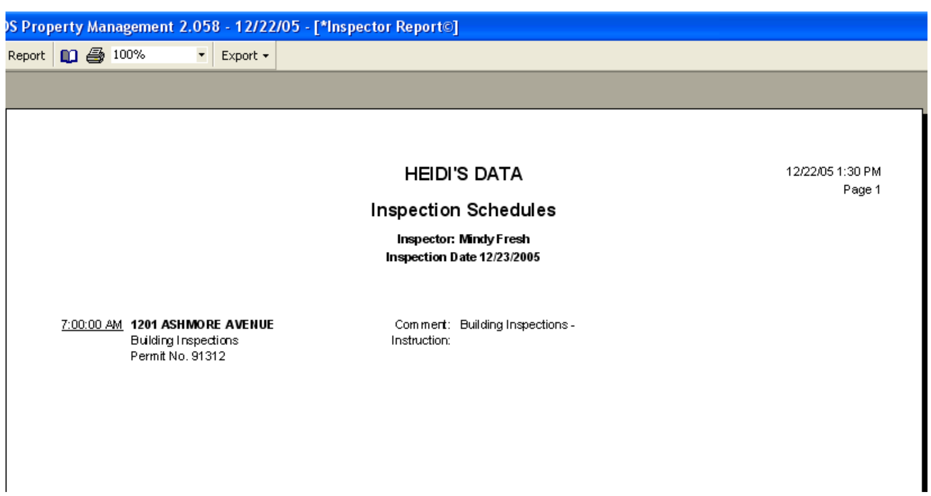
Once you have clicked on New Schedule, a schedule window will pop up. Here you will schedule the inspector and the time in which the inspection will take place. Choose the date and time when you'd like the inspection to take place, then click on Schedule.

As you can see, the inspection is now scheduled.



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.



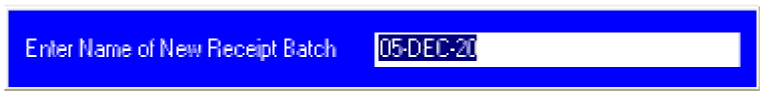
This will print out scheduled inspections for each individual inspector.

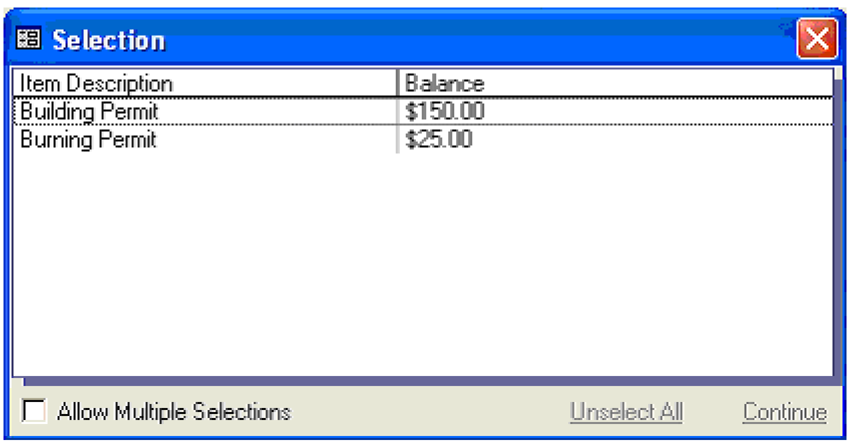
RECEIPT ENTRY

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.

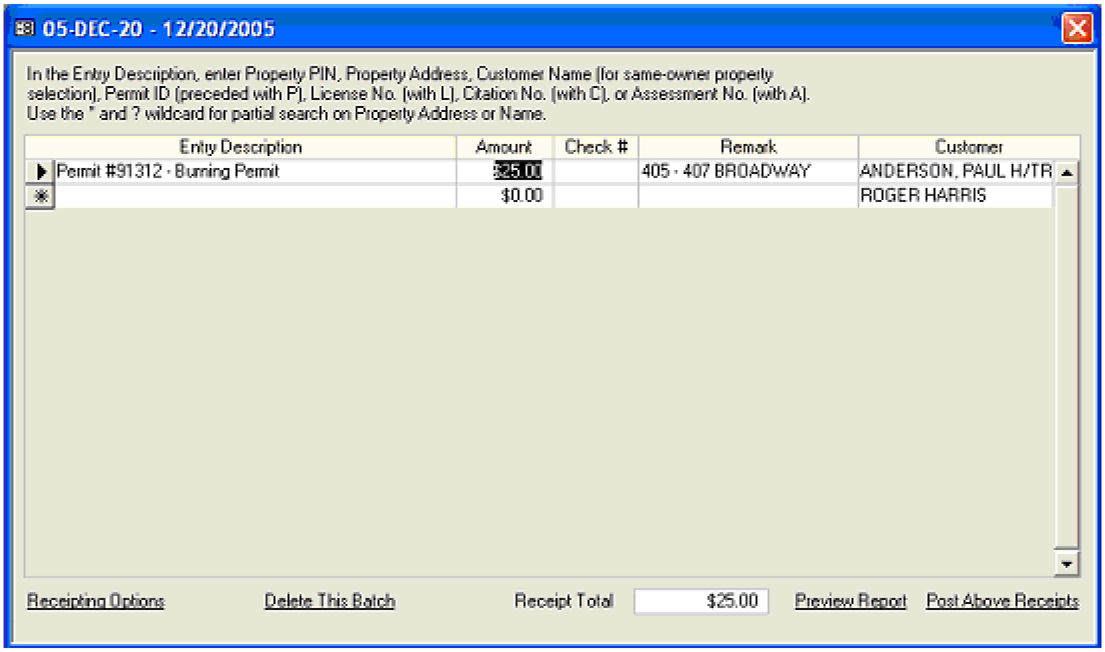
When you create new, a window will come up asking you to name your batch. Then hit your enter key.



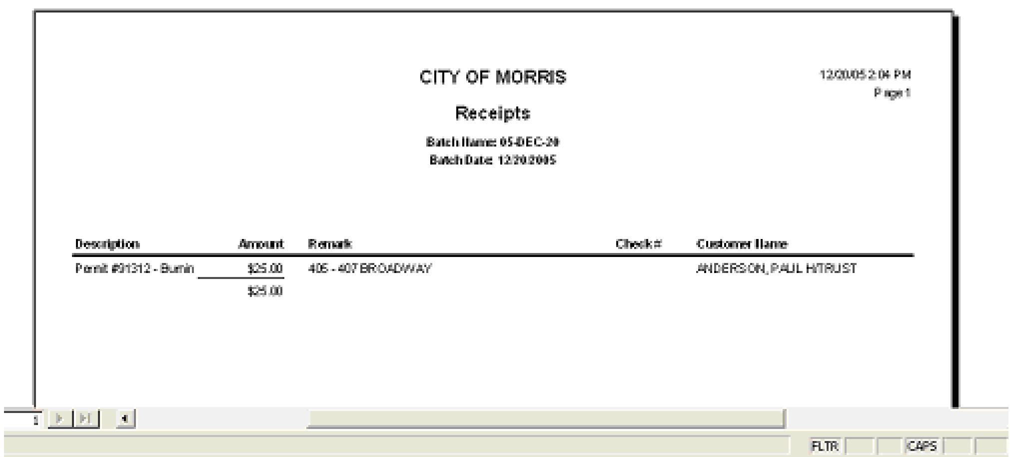


If there is more than one unpaid permits or licenses attached to this property, all of those will come up. And you are able to apply payments to those at this time also.

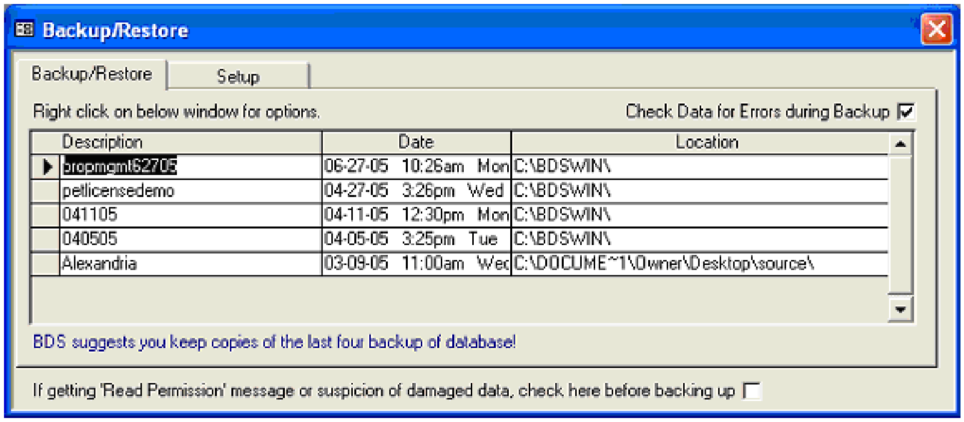
This is the batch screen. You can enter one or more receipt entries per batch.



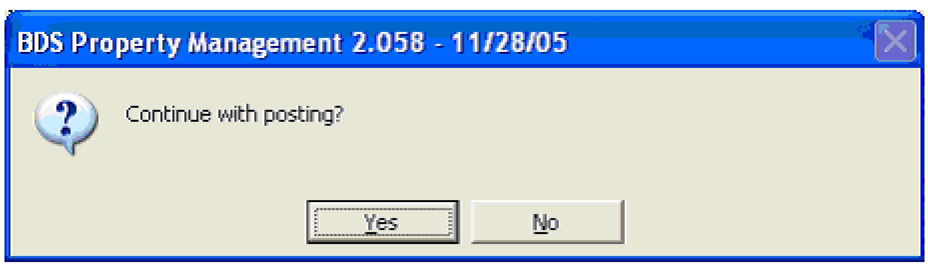
Next, you will print your receipt report, by clicking on Preview Report.



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.

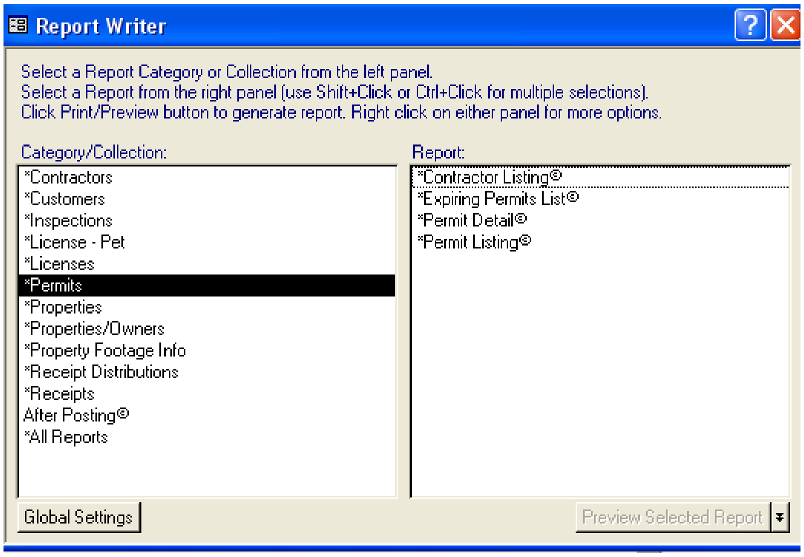


Now, the Backup/Restore window will pop up. If you choose to, you may bypass this step by closing out of the window and continue to posting. However, BDS strongly suggests that you make a backup prior to posting your receipt batch.



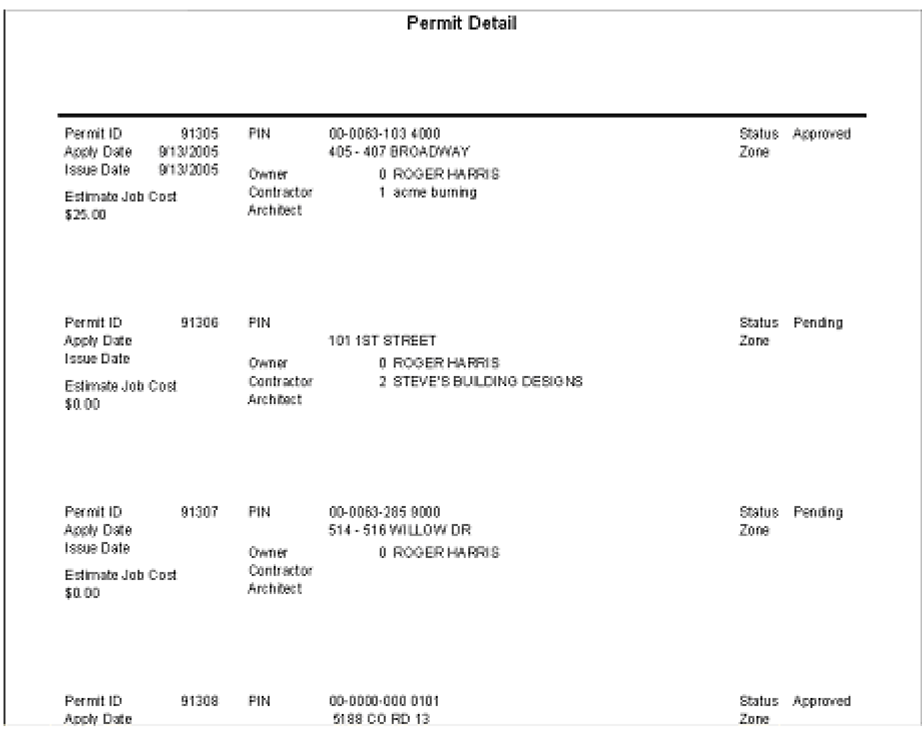
After you have backed up your data, Continue with posting window will pop up. Select yes and you have now posted your receipt batch.

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 acme burning
$25.00 Architect

Permit ID 91306 PIN Status Pending
Apply Date 101 1ST STREET Zone
Issue Date Owner 0 ROGER HARRIS
Estimate Job Cost Contractor 2 STEVE'S BUILDING DESIGNS
$0.00 Architect

Permit ID 91307 PIN 00-0063-285 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