Springbrook

Licenses and Permits

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Licenses and Permits Module

Overview

The Licenses and Permits module is used to create new applications and licenses, edit existing licenses, and renew expired licenses.

License and Permits Module Process Diagram

Each object in the flowchart below represents a process in the application.

License Maintenance

The License Maintenance window represents the core of the Licenses and Permits module. This window is used to record application and license details, apply appropriate fees, and track licensing and payment history.

Cash Receipts LP Licensing Window

The CR LP Licensing window is used to create a license or application based on an LP License Type template at the time that cash is received for the license.

Adjustments

The LP Adjustments process is used to create adjustments on application or license records after payments or invoices have been processed. This process also allows you to apply new credits, deposits, or penalties, reverse transactions, and transfer credits and payments from one account to another.

Letters

The LP Letters process is used to generate letters that can then be sent out to a filtered selection of application or license holders. The MS Word-based mail merge form letters used in this process can be fully customized to meet a variety of mailing needs.

Past Dues

The LP Past Dues process is used to apply the penalties and generate the notifications associated with LP accounts that have past due balances.

License Update

The LP License Update process is used to quickly and easily update multiple licenses. This process can be used, for example, to update licenses after making changes to license-related fees, or to change the status on a large number of licenses without editing individual records.

LP> Adjustments

Enter Adjustments in LP

Summary

Once invoices and/or payments have been processed, these items can be adjusted in the Adjustments palette. Follow this process to enter the transaction adjustments.

Step by Step

1 Open or create an adjustments batch.

- Select the Adjustments palette in LP> Adjustments. This will expand the Adjustments palette and display the steps of the Adjustments batch process.
- Modify an existing batch or create a new Adjustments batch.
    - Select a batch number from the drop-down menu at the top of the Adjustments palette to select an existing batch.
    - Select New from the Adjustments batch number drop-down menu to create a new batch. This will open the **New Batch** window.
    - If there are open batches in the Adjustments process, you can create a new batch without affecting the open batches.

- Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are for reference only. The fiscal period of the transactions in the batch is determined by the Journal Entry Date entered during the Generate step.

- Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.

  - You can also manually create a new batch by entering a Batch Number and clicking the Save icon .

- Highlight the batch in the batch number drop-down menu on the Adjustments palette and press DELETE to delete a batch. Any uncommitted invoices in the batch will be deleted.

2 Enter or edit the adjustments.

- Open the **Edit Adjustments** window (LP> Adjustments> Enter).

- This will display all of the uncommitted adjustments in the open batch.

- Click the Create icon to open the Create Adjustments window.

3 Create an adjustment.

- The **Create Adjustments** window will determine what type of adjustment you create.

- Select an **Adjustment Type** from the drop-down menu.

  - Select Adjustment to make an adjustment to a credit, invoice, payment or penalty associated with an account.

  - Select Apply to apply a credit or deposit to an account.

  - Select New to create a new invoice or to create a new penalty.

  - Select Reversal to reverse a credit, invoice, payment or penalty associated with an account.

  - Select Transfer to transfer a credit, an invoice or a payment from one account to another.

- Select a **Transaction Type** from the drop-down menu.

  - The options available from this drop-down menu are determined by your selection in the Adjustment Type field.

- Enter a **Transaction Date** or select one from the drop-down menu.

- Enter a **Due Date** or select one from the drop-down menu.

  - This field will only be active if New is selected in the Adjustment Type field and Penalty is selected in the Transaction Type field.

  - The Transaction Date and Due Date are used in calculating past due fees in the LP module.

  - The Transaction Date and Due Date are also used in calculating the age of a transaction on aging reports.

- Enter a **Reference Number** as an optional method for tracking originating documentation.

- Enter a **Description** for the adjustment. This is an optional field that can be up to 60 alphanumeric characters long.

- Select a license **Category** from the drop-down menu.

- Enter a **License Number** for the adjustment or click the field label to select one from a list.

  - The displayed license numbers will be limited to those within the selected category.

- Enter an **Application Number** for the adjustment or click the field label to select one from a list.

- Select a **Target Category** for the target license from the drop-down menu.

  - The three target fields will only be enabled if Transfer is selected in the Adjustment Type field.

- Enter a **Target License Number**.

  - This is the license that the transfer will transfer the transaction to.

- Enter a **Target Application Number**.

  - This is the application that the transfer will transfer the transaction to.

- Click the Next button.

4   Select the items to adjust.

- The **Create Adjustments** window will now display all of the selected Transaction Types associated with the license.

- Highlight the transaction you would like to adjust and click the Next button.

5 Enter the adjustment.

- The **Create Adjustments** window will now display the transaction information in the upper Original Details section and the adjusted information in the lower Updated Details section.
- Depending on the transaction type you are adjusting, different fields will be editable in the Updated Details section. For example, if you are adjusting an invoice, the Number of Units and Amount columns will be active for editing.
- Enter the adjustments and click the Finish button.

6 Commit the adjustments batch.

LP> Adjustments

Commit an Adjustments batch

Summary

Once you have entered one or more transaction adjustments you will need to commit the batch. Follow these steps to complete the adjustments batch process.

Step by Step

1   Confirm that adjustments have been entered.

- Open the Edit Adjustments window (LP> Adjustments> Enter) to confirm that at least one adjustment has been entered in the batch.

- Highlight an adjustment and click the Modify icon to change the adjustment details.

- Click the Create icon to create a new adjustment.

- Highlight an adjustment and click the Delete icon or press DELETE to delete the selected adjustment.

2 Print an adjustments proof list.

- Open the **Adjustments Proof List** window (LP> Adjustments> Proof List).

- Select the report type you would like to print.

   - The **Summary** report displays the Invoice Number, Transaction Date, Transaction Type, Customer Name, Application Number, License Number, Description and Amount. The total amount for all batch adjustments will also be displayed.

   - The **Detail** report includes the information displayed in the Summary report and also displays the Fee Code, Debit Account, Credit Account and debit or credit amount.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

   - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

   - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

   - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

   - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

3 Print the GL Distribution list.

- Open the **Print GL Distribution** window (LP> Adjustments> GL Distribution).

- Enter the transaction date you want to appear in the General Ledger for this batch in the **Journal Entry** date field. This date will determine the fiscal period in which the adjustments are recorded.

  - The **Fiscal Period** and **Fiscal Year** fields will populate based on the Journal Entry date selected.

- Select a **Report Type** from the drop-down menu.

  - The report will display the Fund, Account, Description, Debit Amount, and Credit Amount. The report will also provide subtotals by account number and Fund as well as a report total.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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4   Print the Adjustment Statements.

- Open the **Print Adjustments Statements** window (LP> Adjustments> Statements).

- Select the **Adjustment Types** you would like to include in the statement batch. By default, all types will be checked.

- Use the **Printer Adjustment** field to adjust where the first line of the statements will print. If you adjust the alignment of the statements you may want to print a test statement before printing a large batch.

  - Zero is the system default. Adjusting the value up will move the first line of the statement up on the printed page and adjusting the value down will move the first line down.

- Select how you want the logo to display in the **Logo Options** field.

  - Select **All Pages** to display the logo on all pages of the statements.

  - Select **First Page Only** if you would like to display the logo on the first page of a statement only. If the statement is more than one page, the logo will not display on the second page and the space where the logo normally prints will be blank, shifting all fields on the second page up.

  - Select **Don't Print and Leave Room** if you would like to leave the space that the logo normally prints in on the top of every page, but leave the logo off the

statements. If the statement is more than one page, the spacing on the second page will be the same as the first. Choose this option if you are using pre-printed statement stock with a logo at the top of every page.

- Select **Don't Print and Don't Leave Room** if you would like to print the statements without logos or blank spaces.

- If more than one statement is being printed, select how the statements are sorted in the **Sort By** field. The statements can be sorted by application number, license number or customer number.

- Check the **Print Perforation Line** toggle to print a perforation line at the top of the returnable section of the statement.

- Click the **Address 1** field label in the **Remit Address** section to attach a remit address to the statement. Remit addresses are created and maintained in the Remit Address Maintenance window (LP> Maintenance> Remit Address).

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

5 Print the Adjustment Letters. This is an optional step.

- The Adjustments Letters are meant to be run in conjunction with the Adjustments Statements. Rather than providing the financial detail found in the statements, letters provide general information such as the total amount adjusted.
- Select a **Form** from the drop-down menu.
    - The printed letters will use the selected Form as a template.
    - Forms are created and maintained on the Forms Maintenance window (LP> Maintenance> Forms).
- The **Tran Date** field will populate with the transaction date specified on the GL Distribution step.
- The **Compatibility** mode toggle is used to activate compatibility mode for legacy forms that don't use standard Springbrook forms functionality.
    - Springbrook does not recommend using Compatibility mode as it will disable a number of useful form features.
- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

- Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

- Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

6 Commit the adjustments batch.

- Open the **Commit Adjustments** window (LP> Adjustments> Commit).

- The Batch, Journal Entry Date, Fiscal Period and Fiscal Year fields will all populate with the information determined earlier in the batch process. If you would like to change this information, return to the GL Distribution step.

- Click the Confirm button to commit the batch. The information from the batch is now permanently posted to the General Ledger and the customer accounts.

LP> Display> Transaction Detail

Display LP Transaction Details

Summary

The Transaction Detail window is used to display the transaction level details associated with a filtered list of historical transactions.

Step by Step

1 Open the **Transaction Detail** window (LP> Display> Transaction Detail).

2 Filter the displayed transaction details.

- Enter the desired filter details in the Search Criteria section. Click the Refresh icon or press ENTER to populate the data grid below with the transactions that meet the specified criteria.
    - Right click on the records in the window and select Export grid contents to Excel if you would like to export the information that displays in the window to an MS Excel spreadsheet.
- Highlight a transaction and click the Display icon to view the transaction details.

LP> Letters> Generate

Generate LP Letters

Summary

The Letters process is used to generate customized, Microsoft Word-based form letters for a filtered range of LP accounts. These letters can serve a variety of purposes, such as notifying customers of changes to application rates or requesting updated permit information.

Customers associated with the LP account will only receive a letter if the Notification toggle is checked on the License Maintenance window (LP> Maintenance> License> General tab> **Notification** toggle). Any contacts attached to the license that also have the Notification toggle checked will receive a letter as well (LP> Maintenance> License> Contacts tab> select a contact> Notification toggle).

Once a letter is generated, the letter details will be recorded on the LP account record (LP> Maintenance> License> History tab). Follow this process to generate an LP Letters batch.

Step by Step

1 Create a batch.

- Select the **Letters** palette in LP> Letters. This will expand the Letters palette and display the steps in the batch process.

- Select New from the Letters batch number drop-down menu to create a new batch. This will open the **New Batch** window.

  - If there are open batches in the Letters process, you can create a new batch without affecting the open batches.

- Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are used for reference only. The transaction date of the billing is set up in the Generate step and the fiscal period the transactions are posted to is determined by the **Journal Entry Date** entered when creating the GL Distribution Report (LP> Letters> GL Distribution).

- Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.

  - You can also manually create a new batch by entering a **Batch Number** and clicking the Save icon .

- You can delete batches by selecting a batch and pressing DELETE.

2 Generate the Letters.

- Open the **Generate Letters** window (LP> Letters> Generate).

- Check the **License Type** toggles for each of the license types you would like to include in the Letters batch. All license types will be checked by default. Hold down the SHIFT key to select multiple license types. You may decide to process a new Letters batch for each group of similar license types. This can help prevent over-lapping records and redundant letters.

  - License types are used to group similar licenses together into logical associations.

  - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

- Check the **Licenses Status** toggles for each of the license statuses you would like to include in the Letters batch. All license statuses will be checked by default. Hold down the SHIFT key to select multiple license statuses.

  - License Statuses are primarily used for informational and reporting purposes. Licenses can be set up to automatically change to a particular status when a specified event takes place.

  - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- Check the **License Classes** toggles for each of the license classes you would like to include in the Letters batch. All license classes will be checked by default. Hold down the SHIFT key to select multiple license classes.

  - License Classes can be used to further classify your Licenses. They are associated with License types. For example, Licenses types could be classified as residential, commercial, industrial or home based. License Classes are primarily informational and are available for reporting purposes.

- License classes are created and maintained on the License Class Maintenance window (LP> Maintenance> License Class).

- Check the **Business Type** toggles for each of the business types you would like to include in the Letters batch. All business types will be checked by default. Hold down the SHIFT key to select multiple business types.

  - Business Types are created and maintained on the Business Type Maintenance window (LP> Maintenance> Business Type).

- Specify a **Letter Transaction Date** for the Letters batch.

  - This date will be associated with the Letters line item on the License window (LP> Maintenance> License> Select a license> History tab).

- Select a status from the **Change status to** drop-down menu.

  - When the Letters batch is committed, any licenses or applications included will update to the selected status.

- Enter a **Description** for the Letters batch. This description will display in the letters line item on the History tab of the License Maintenance window.

  - This description can be up to 60 characters long.

3   Complete the optional Filters, Tran Filters and License tabs.

- The **Filters** tab is used to filter the included licenses by category.

    - Select a **Category** from the drop-down menu.

    - Use the **Application Number**, **License Number**, **Application Date**, **License Start**, and **Expiration Date** fields to further filter the licenses included in the batch.

- The **Pet** tab will only be active if Pet is selected from the Category drop-down menu.

    - Use these filters to limit the licenses included in the batch by pet tag number and vaccination date.

- The **Tran Filters** tab is used to filter the included licenses by transaction type.

    - Select a **Tran Type** from the drop-down menu.

        - Your selection in the Tran Type field will determine which of the date range and return fields will be enabled below.

    - The **Batch Process** and **Batch Number** fields can be used to filter the transactions included in the batch by specific batches.

        - This is helpful when generating letters for web transactions, which are generally set up to populate a single batch per day.

- The **Licenses** tab is used to add specific licenses to the batch.

    - Click the Create icon to choose a license from the License Selection window. Highlight the license you would like to add to the batch and click the Confirm icon to return to the Generate Letters window.

    - The License tab overrides all other filters. If you use the license tab to add licenses to the batch, only those licenses will be included.

- Click the Confirm icon ✅ to generate the letters immediately or enter a date and time in the field next to the Confirm icon to schedule the letters to generate at a later time.

4   Edit and print the Letters.

LP> Letters> Edit

Edit and Print LP Letters

Summary

After completing the Generate step you can view and edit which accounts will be receiving LP Letters before printing.

Step by Step

1   Edit the Letters.

- Open the **Edit Letters** window (LP> Letters> Edit).
- The Edit Letters window will display all of the licenses that will be included in the letters batch. Licenses are included based on the filter criteria established on the Generate Letters step. Individual licenses can be removed from the batch by highlighting a license and clicking the Delete icon .
- Each line item will display the Application Number, License Number, Customer Number, Customer Name, License Type, and License amount.
- Click the Save icon when finished.

2   Print the Letters.

- The **Form** and **Tran Date** fields will populate with the values specified on the Generate step.

- The **Compatibility** mode toggle is used to activate compatibility mode for legacy forms that don't use standard Springbrook forms functionality.

  - Springbrook does not recommend using Compatibility mode as it will disable a number of useful form features.

- The format and information included on the printed letters is determined by which Form is selected.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

3   Print the Licenses. This is an optional step.

- The License Print window is used to print a license for each of the licenses or permits included in a Letters batch.

- Open the **License Print** window (LP> Letters> Licenses).

- Click the **Name** field label to open the License Setup Selection window.

  - The License Setup Selection window will display all of the license setups created in the application. License setups are used to configure how printed licenses are displayed.

  - License setups are created and maintained on the License Setup Maintenance window (LP> Maintenance> License Setup).

- The **Logo Location** field is used to specify where the organization logo will display on the printed license header.

  - The logo location will affect how the Header 1-3 fields specified on the license setup will be displayed.

- The **Licenses Per Page** field is used to specify whether you would like to print one license per page or three licenses per page.

  - The Fee Options field will automatically be set to None if you choose to print three licenses per page.

- The **Fee Options** field is used to specify whether the printed report will display no fee information, fees only, fees and units, or fees, units and descriptions.

- The **Printer Adjustment** field is used to adjust where the first line of the statements will print. If you adjust the alignment of the statements you may want to print a test statement before printing a large batch.

- Zero is the system default. Adjusting the value up will move the first line of the statement up on the printed page and adjusting the value down will move the first line down.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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4   Commit the Letters batch.

- Open the **Commit Letters batch** window (LP> Letters> Commit).
- Click the OK button to commit the batch.

- Committing a letters batch will create a Letter row on the License Maintenance window (LP> Maintenance> License Maintenance> History tab). Committed letters batches will display in black while uncommitted batches will display in red.

LP> License Update

Update Licenses in LP

Summary

The License Update process is used to quickly and easily update multiple licenses. This process can be used, for example, to update licenses after making changes to license-related fees, or to change the status on a large number of licenses without editing individual records.

Step by Step

1   Open or create a License Update batch.

- Select the License Update palette in LP> License Update. This will expand the License Update palette and display the steps of the batch process.
- Modify an existing batch or create a new License Update batch.
  - The License Update process is a single-batch process, meaning you can only have one active batch at a given time. If there is an open batch in the License Update palette, you will need to either complete that batch or delete that batch before creating a new batch.
    - If you open an existing batch and return to an earlier step in the batch process, all existing data in that batch will be overwritten.

- Select New from the License Update batch number drop-down menu to create a new batch. This will open the **New Batch** window.

- Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are for reference only. The fiscal period of the transactions in the batch is determined by the Journal Entry Date entered during the Generate step.

- Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.

  - You can also manually create a new batch by entering a Batch Number and clicking the Save icon.

- Highlight the batch in the batch number drop-down menu on the License Update palette and press DELETE to delete a batch.

2 Generate the License Update.

- Select the **License Types** you would like to include in the update batch.

  - Click the Select All or Deselect All icon drop-down menus to select or deselect all of the displayed License Types. All License Types are selected by default.

    - These icons can be used to select or deselect the Fees, Statuses, and Classes as well.

- License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).
- Select the **Fees** you would like to include in the update batch.
  - The Fees selection field will only be enabled if No is selected in the **Ignore Fees** drop-down menu.
  - Fees are created and maintained on the Fee Maintenance window (LP> Maintenance> Fee).
- Select the **License Statuses** you would like to include in the update batch.
  - License Statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).
- Select the **License Classes** you would like to include in the update batch.
  - License Classes are created and maintained on the License Status Maintenance window (LP> Maintenance> License Class).
- Select Yes in the **Ignore Fees** drop-down menu to disable the Fees selection field and ignore fees in the update batch.
- Select a license status in the **Change License Status To** drop-down menu. This will be the new status for all license included in the update batch.

3   Complete the Update Fees tab.

- Add additional fees to the licenses included in the batch.

  - Click the Create icon ⬜ drop-down menu and select Add a Fee to add a fee to the Update Fees grid. This will open the Fee Selection window.

  - Select a fee and click the Confirm icon ✅ to add that fee to the update grid.

  - Click the Delete icon 🗑 to remove a fee from the update grid.

  - Click the Ellipsis icon ⬚ to update the Status column on the selected fee.

  - When the batch is committed, each of the licenses included will now have the additional fees attached.

- Modify any fees attached to the licenses included in the batch.

  - Click the Create icon ⬜ drop-down menu and select Modify a Fee to add a fee to the Update Fees grid. This will open the Fee Selection window.

  - Select a fee and click the Confirm icon ✅ to add that fee to the update grid.

  - Click the Delete icon 🗑 to remove a fee from the update grid.

  - Click the Ellipsis icon ⬚ to update the Status column on the selected fee.

  - When the batch is committed, any licenses included in the batch that have the modified fee attached will now display the new fee status.

- Remove any fees attached to the licenses included in the batch.

  - Click the Create icon ⬜ drop-down menu and select Remove a Fee to add a fee to the Update Fees grid. This will open the Fee Selection window.

  - Select a fee and click the Confirm icon ✅ to add that fee to the update grid.

- Click the Delete icon to remove a fee from the update grid.

- When the batch is committed, any licenses included in the batch that had the removed fee attached will no longer display the selected fee.

4 Complete the Filters tab.

- The **Filters** tab is used to filter which licenses will be included in the License Update batch.

- Select a **Category** from the drop-down menu.

    - The categories displayed in the drop-down menu will be determined by the security settings established for the current user. If All is selected, only the displayed categories will be included.

- Use the **Application Number From** and **To**, **License Number From** and **To**, **Application Date From** and **To**, **License Start From** and **To**, and **Expiration Date From** and **To** fields to filter the licenses that will be included in the batch.

    - If the filtering process includes licenses that you do not want to include in the batch, you can remove those licenses in the Edit step.

5 Complete the License tab.

- The **License** tab is used to select specific licenses that you would like included in the batch.

- Click the Create icon ▯ to add a license to the tab. This will open the License Selection window.

- Select the licenses you would like to add to the update batch and click the Confirm icon ✅.

- Only the licenses displayed on the License tab will be included in the update batch. In order to include all licenses that meet the criteria established on the Filters tab, leave the License tab blank.

- Click the Confirm icon ✅ when complete.

6 Complete the Misc Update tab.

- The **Misc Update** tab is used to populate a specified miscellaneous field on the license record with a comment code comment. Comment codes are created and maintained on the Comment Code Maintenance window (LP> Maintenance> Comment Code).

  - Only comment codes that were previously attached to a license can be used to update a miscellaneous field.

  - The comment that will populate the miscellaneous field is the comment added to the license record when the comment code was attached (LP> Maintenance> License> open a license> Comments tab> **Comment** field).

- The comment code and the comment code description will not be included in the miscellaneous field. Only the comment entered on the license record will be included.
- Click the Create icon ⬜ to add a comment code to the tab. This will open the Comment Code Selection window.
    - Select the comment code you would like to add to the tab and click the Confirm icon ✅.
        - If the comment code you selected is not already attached to a license, that license will not be included in the License Update batch.
    - If the comment is longer than 64 characters, it will be truncated to meet the 64 character limit.
- Click the Ellipsis icon ⬚ in the Destination column to select which miscellaneous field the comment code comment will be populated in.
    - If the miscellaneous field is already populated, the original value will be replaced with the specified comment code comment.
- Click the Confirm icon ✅ when complete.

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7   Edit the License Update batch.

- Open the **Edit License Update** window (LP> Update License> Edit).
- This window will display each of the licenses that will be included in the update batch.

- The Edit tab will only display those fields that will be updated for each included license line item.

  - Status updates and fee updates will appear as different line items even if they apply to the same license.

- The Error tab will display any errors that occurred when the update batch was generated. Return to the Generate step to update the batch settings.

- Highlight a license update line item and click the Delete icon to remove that update from the batch.

- Click the Save icon after making any changes to the batch.

8   Commit the License Update batch.

- Open the **Commit License Update** window (LP> Update Licenses> Commit).

- Click the OK button to commit the batch. The information from the batch is now permanently posted to the General Ledger and the customer accounts.

- The updated license status and any changes to the fees attached to the license will now display on the License Maintenance window (LP> Maintenance> License).

LP> Maintenance> Alert Code

Alert Code Maintenance

Summary

Alert codes can be set up to alert users when they select and edit a license from within the LP module or when the license is accessed via the Cash Receipts interface. The alert window will display the system that the license was accessed from, the alert code, the expiration date for the alert code, and any comments added to the alert code. When the user closes the alert window, the license that they selected will open.

The alert code details specified when the alert code is created are used only as a template. These details can be edited when the alert code is attached to a license. Because these details can be edited on each license, any changes made to an alert code on the Alert Code Maintenance window will not automatically update on the licenses that the edited alert code was previously attached to.

Step by Step

1   View the existing alert codes.

- Open the **Alert Code Maintenance** window (LP> Maintenance> Alert Code).

- The left section of the window will display all of the alert codes that have been cre-ated in the application. Select an alert code in the left section of the window and the information attached to that alert code will populate in the Maintenance section to the right.

- Highlight an alert code and press DELETE or click the Delete icon if you would like to delete an alert code.

    - You cannot delete an alert code that is attached to an existing license.

- Press INSERT or click the Create icon if you would like to create a new alert code. This will create a new line item in the left section of the window and the fields in the Maintenance section will be enabled to enter the alert code information.

2   Create a new alert code.

- Enter a unique **Alert Code**. Once the new alert code is saved, this field cannot be edited.

    - The alert code can be up to 20 characters long.

- Enter a **Description** for the new alert code.

    - This field can be up to 60 characters long.

- Specify the alert code **Duration** in days.

    - The default start date for an alert code is the day it is attached to the license. The alert code expiration date is the start date plus the Duration. This value

can be between 0 and 999.

- Enter a **Comment** on the alert code.

  - The Comment will display when the alert is activated. The field can be up to 1024 characters.

- Check the **Selection Alert** toggle to activate the alert message when the license is selected for a batch process, such as LP Letters.

  - The selection alert will not activate if the license is included in a batch as a member of a group select during a batch generate step.

- Check the **Maintenance Alert** toggle to activate the alert message when the license is opened from any window where the license details can be maintained or edited.

- Check the **CR Receipt Alert** toggle to activate the alert message when the license is selected from the CR Cash Entry search window.

- Click the Save icon to save the new alert code.

LP> Maintenance> Approval Type

Approval Type Maintenance

Summary

Approval Types are used to create approval steps on LP licenses. They can be set up to notify a particular user, update the license status, apply a fee or attach an alert code to the license when the approval step is approved or failed.

Once an approval type is created, it can be attached to a license on the License Maintenance window (LP> Maintenance> License> Approval tab).

Step by Step

1 View the existing Approval Type codes.

- Open the **Approval Type Selection** window (LP> Maintenance> Approval Type).
- This window will display all of the approval type codes created in the application.
- Highlight an approval type and press DELETE or click the Delete icon if you would like to delete an approval type.
    - You cannot delete an approval type that is attached to an existing license.

- Press ENTER or click the Modify icon to edit an existing approval type.

- Press INSERT or click the Create icon if you would like to create a new approval type code. This will open the Approval Type Maintenance window.

2   Create a new Approval Type code.

- Enter a unique **Approval Type** code. Be as descriptive as possible as this is the primary way to differentiate between approval steps on the License Maintenance window.

  - This code can be up to 20 characters long.

- Enter an optional **Description** for the approval type.

  - This field can accommodate up to 60 characters.

- Specify the duration of the approval type in the **Days to Expire** field.

  - When the approval type is attached to a license as an approval step, the expiration date of that approval step will be the date it is attached plus the duration specified in this field.

  - This duration must be between zero and 999 days.

- Enter any **Notes** for the approval type.

  - This field can accommodate up to 512 characters.

- The **Notify** drop-down menu is used to determine which users will be notified when an approval step on a license requires their attention. By selecting queue, role or user, the default value set up below will be the notification recipient.

- The **Default Queue**, **Default Role** and **Default User** fields are used to specify a default queue, role or user that will be notified when an approval step requires attention.

  - Queues are created and maintained on the Queue Maintenance window (LP> Maintenance> Queue).

  - Roles are created and maintained on the Role Maintenance window (SS> Security> Role).

  - Users are created and maintained on the User Maintenance window (SS> Security> User).

- The **Status on Approve** and **Status on Fail** fields are used to specify what status the license will change to when the approval step is approved or failed.

  - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

  - These approval and fail fields are optional. Each of these values can be specified when the approval step is added to the license.

- The **Fee on Approve** and **Fee on Fail** fields are used to apply a fee to the license when the approval step is approved or failed.

- The **Alert on Approve** and **Alert on Fail** fields are used to attach an alert to the license when it is approved or failed.

  - An alert code attached to the license upon approval or failure will behave in the same manner as any other alert attached to the license.

- Click the Save icon 💾 to save the new approval type code.

LP> Maintenance> Business Classes

Create a Business Class in LP

Summary

Business classes and business types are optional divisions you can attach to licenses to categorize LP licenses. Business classes are not directly attached to licenses. Instead, business classes are attached to business types, and business types are then attached to LP licenses in the License Maintenance window (LP> Maintenance> License> Open or create a license> General tab> License Type field).

A business class is a broad group and can be attached to many unique business types, so business types are generally used as a sub-grouping of business classes. For example, if you would like to track the issuance of several types of restaurant licenses, you could create a restaurant business class, and have business types such as fast food, sit-down restaurant, and restaurant with bar.

Step by Step

1   Open the Business Class Selection window.

- The **Business Class Selection** window (LP> Maintenance> Business Class) will display all of the business classes created in the application.

- Highlight a business class and click the Delete icon to delete the business class.

  - If you delete a business class that has attached business types, those business types will no longer be associated with a business class.

- Highlight a business class and click the Modify icon or click the Create icon to open the **Business Class Maintenance** window.

2   Create a Business Class.

- Enter a unique business class name in the **Class** field. This name can be up to 20 alphanumeric characters.

  - Once a business class code is created it cannot be edited.

- Enter a business class **Description**. This optional field can be up to 60 alphanumeric characters.

- Click the Create icon to associate a business type with the new business class.

  - This will open the **Business Type Selection** window.

  - Highlight a business type and click the Confirm icon to return to the Business Class Maintenance window.

- Each business type can only be associated with one business class. If you attempt to attach a business type to a second business class a validation error window will display which class the type is already attached to.

- Click the Save icon 💾 to save the new business class.

LP> Maintenance> Business Types

Create a Business Type in LP

Summary

The Business Type Maintenance window is used to create and maintain business types. Multiple business types can be organized under one Business Class grouping. Business Types allow you to provide more detailed reporting of businesses licensed in your organization. An example of a Business Class would be *Contractor* and a corresponding Business Type would be *Plumber*. This type of set up would allow you to print a report on all the Contractors or just the Plumbers that have licenses.

Business types contain a user defined code and description, SIC (Standard Industrial Classification System) code, and NAICS (North American Industry Classification System) code.

Step by Step

1 View the existing business types.

   - Open the **Business Type Maintenance** window (LP> Maintenance> Business Type).

- The left section of the window will display all of the business types that have been created in the application. Select a business type in the left section of the window and the information attached to that business type will populate in the Maintenance section to the right.

- Highlight a business type and press DELETE or click the Delete icon if you would like to delete a business type.

    - You cannot delete a business type that is attached to a class (LP> Maintenance> Business Class> Open a class). If you try to delete a business type that is attached to another record, an information window will open displaying the record it is attached to.

- Press INSERT or click the Create icon if you would like to create a new business type. This will create a new line item in the left hand portion of the window and the fields in the Maintenance section will be enabled to enter the business type information.

2   Create or modify a business type.

- The **Code** field is used to identify a unique business type. The business code can be up to eight characters long.

    - This is the only required field in the window. All other fields are optional.

    - Once a business type code is created it cannot be edited.

- The **Description** field is used to enter a description on the business type. The description can be up to 60 characters long.

- The **SIC** field is used to enter a Standard Industrial Classification System code. This code can be up to 40 characters long.

  - SIC codes are used to classify industries and are established by the U.S. Government.

- The **NAICS** field is used to enter a North American Industry Classification System code. This code can be up to 40 characters long.

  - NAICS codes are used to classify industrial activity in the United States, Canada and Mexico.

- Press ENTER or click the Save icon to save the business type.

- Once a business type has been created, you can add it to a class using the Class Maintenance window (LP> Maintenance> Business Class> Open a class).

  - Each business type can only be added to one business class.

LP> Maintenance> Comment Code

Comment Code Maintenance

Summary

Comments can be attached to licenses to track any notes about the license including phone conversations, complaints, and requests. Comments are added to LP license accounts in the License Maintenance window (LP> Maintenance> License> Open a license> Comments tab).

Step by Step

1   View the existing comment codes.

- Open the **Comment Code Maintenance** window (LP> Maintenance> Comment Code).
- The left section of the window will display all of the comment codes that have been created in the application. Select a comment code in the left section of the window and the information attached to that comment code will populate in the Maintenance section to the right.

- Highlight a comment code and press DELETE or click the Delete icon if you would like to delete a comment code.

  - You cannot delete a comment code that is attached to a license.

- Press INSERT or click the Create icon if you would like to create a new comment code. This will create a new line item in the left section of the window and the fields in the Maintenance section will be enabled to enter the comment code information.

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2   Create or modify a comment code.

- The **Code** field is used to identify a unique comment code. The comment code can be up to 20 characters long.

  - Once a comment code has been created it cannot be changed.

- The **Description** field is used to enter a description on the comment code. This optional field can be up to 60 characters long.

- Press ENTER or click the Save icon to save the comment code.

LP> Maintenance> Contact Type

Create a Contact in LP

Summary

Contact Types are contact categories that can be used to attach contacts to licenses. You can reduce data entry by creating contact types for the most common contacts you use. Contacts can be attached to licenses on the Contacts tab of the License Maintenance window in order to associate particular individuals with particular licenses.

Follow this process to create a contact type in the LP module. The contact types you create in the LP module will also be available in the Business Tax module.

Step by Step

1   Open the Contact Type Maintenance window.

- The **Contact Type Maintenance** window (LP> Maintenance> Contact Type) will display a list of all the contact types created in the application.

- Click the Delete icon to delete a contact type.

    - You cannot delete contact types that are attached to existing licenses or BT businesses.

- Click on the Create icon to add a new contact type.

2 Create a Contact Type.

- Enter a contact type in the **Contact Type** field. This code can be up to 20 alpha-numeric characters. This field will not be enabled and available for editing after the contact type has been saved.

- Enter an optional description in the **Description** field. The Description can be up to 60 alphanumeric characters.

- Click on the Save icon or press ENTER to save the contact type.

    - Once a contact type is created, it will be accessible from the Contacts tab of the License Maintenance window.

LP> Maintenance> Fees

Create a Fee in LP

Summary

The Fee Maintenance window is used to create and maintain fee codes. Fees are user-defined codes used to generate an associated transaction on a license.

Step by Step

1 View the existing fees.

- The **Fee Selection** window (LP> Maintenance> Fees) displays all of the fees created in the LP Module.

- Highlight a fee and click the Delete icon or press DELETE to delete the selected fee.

  - Fees that are attached to license types or other fees as late or penalty fees cannot be deleted.

- Highlight a fee and click the Modify icon to edit the selected fee.

- Click the Create icon to open the **Fee Maintenance** window.

2 Create a new fee.

- Enter a unique **Code** for the new fee. The fee code can be up to eight alphanumeric characters.

  - Once a fee is created, the Code field cannot be changed.

- Enter a fee code **Description**. This optional field can be up to 60 alphanumeric characters.

- Select a **Fee Type** from the drop-down menu.

  - The available fee types are Deposit, Penalty, Standard and Tax. The fee type selected will determine which of the remaining fields are enabled.

- Enter a **Fee Unit Type** or click the field label to choose one from a list.

  - When charges are generated for a fee unit type based license, the license will bill, partially or wholly, based on the number of units specified under the Rates section. If no units are specified, no charges will be generated for this fee.

  - The Fee Unit Type field will only be active when creating a Standard fee.

  - Fee unit types are created and maintained on the Fee Unit Type Maintenance window (LP> Maintenance> Fee Unit Type).

- Enter an amount in the **Fixed Amount** field if this fee code will be used for a transaction that is usually the same dollar amount.

  - The Fixed Amount field will only be active when creating a Deposit or Standard fee.

- Enter a **Payment Priority** or click the field label to choose one from a list. This is a required field.

    - Payment priority codes determine the order in which fees are paid. Payment priorities are created and maintained on the Payment Priority Maintenance window (LP> Maintenance> Payment Priority).

- Attach an **AR Account**, **Revenue Account** and **Cash Account** to the fee. These accounts must be designated in order to create the fee.

    - When charges are generated, the system will debit the AR Account and credit the Revenue Account.

	Debit	Credit
AR	*Fee*	
Revenue		*Fee*

    - When payment is received, the system will debit the Cash Account and credit the AR Account.

	Debit	Credit
Cash	*Fee*	
AR		*Fee*

    - The system will not validate what type of account was entered, so you can enter any account you choose.

- If you would like to attach a **Late Fee** to the new fee, enter one in the Late Fee field or click the field label to choose one from a list.
  - If the Fee Selection window does not display a late fee, you will need to create one before it can be attached to another fee.
- Select a **Prorate** option from the drop-down menu.
  - Select Fixed to base prorated fee charges on the value in the Fixed Amount field.
  - Select Fixed and Tier to base prorated fee charges on both the value in the Fixed Amount field and the applicable tier charges established in the Rates section.
  - Select Tier to base prorated fee charges on the applicable tier charges established in the Rates section.
  - Fees will *only* be prorated when the fee is included on a new license, not an application, issued through the Cash Receipts LP interface.
- The **Prorate Period** field will only be active if you have selected a prorate option.
  - Select Daily, Monthly, Quarterly or Semi-Annually to determine the prorate period.
- Add fees to the **Tax Fees** field.
  - The Tax Fees field will only be active if the Fee Type is set to Penalty or Standard.
  - Click the Create icon drop-down menu and select New Tax Fee to add tax fees to this field. This will open a Fee Selection window.
  - If the Fee Selection window does not display a tax fee you will need to create one.

- By default the **Active** toggle will be checked. If you do not want users to have access to this fee, un-check this toggle. This is usually done when a fee is no longer in use.

- Check the **Accumulate rates for each tier** toggle to accumulate rate amounts that fall across individual rate tiers.

  - For example, you might set up a late payment penalty fee tier system that looks like this:

    - 0 - 15 days late = $1 per day

    - 15 - 30 days late = $2 per day

    - 30 - 45 days late = $3 per day

  - If the **Accumulate rates for each tier** toggle is not checked, a penalty fee for a bill that is 40 days overdue would be $120 as it falls into the 30 - 45 days late tier (40 days x $3 per day).

  - If the **Accumulate rates for each tier** toggle is checked, a penalty fee for a bill that is 40 days overdue would be $75 as it is spread over all three tiers (15 days x $1 per day + 15 days x $2 per day + 10 days x $3 per day).

  - This toggle will not be active if the Fee Type is set to Deposit or Penalty.

3   Add rates to the fee.

- The **Rates** section of the Fee Maintenance window is used in conjunction with the fee units specified on the fee. The rates section tells the system how much to

charge for each unit specified on the license. This section will not be enabled when creating a Deposit fee.

- Click the Create icon drop-down menu and select New Rate to create a new rate line item.

- Enter the range values in the **Greater Than** and **Through** fields.

  - These values will designate the lower and upper limits of each penalty fee tier.

  - For example, a three-tier late fee might include ranges of 0 - 15 days, 15 - 30 days and 30 - 45 days. In this case, you would need to create a new rate line item for each of these ranges. The high limit a lower tier should match the low limit of the next tier.

- Check the **Or Over** toggle if you want the range to apply to unit values that are greater than the upper range entered in the Through field.

- Enter a **Rate** for the fee.

  - The Rate applies to both Percentage and Per Unit fees.

  - To create a Percentage fee, check the **Percentage** toggle and enter the percentage to be charged by the fee in the Rate field.

    - On Penalty fees, the percentage in the Rate field will be multiplied by the past due amount.

  - To create a Per Unit fee, check the **Per Unit** toggle and enter the per unit charge in the Rate field.

    - This is generally the amount you would like to charge for every unit in the range. The value in the **Every** field will determine how often the amount in the Rate field is charged. For example, if you want to charge $1 per day for every day a fee is overdue, you would enter a 1 in the Every field. If you are using a tier system, the rate might be $1 per day

for 0 - 15 days overdue, $2 per day for 15 - 30 days overdue and $3 per day for 30 - 45 days overdue.

- Click the Save icon 💾 when complete.

LP> Maintenance> Fee Unit Type

Fee Unit Type Maintenance

Summary

The Fee Unit Type Maintenance window is used to define what units will be used to assess license and permit fees. A fee unit type is a user-defined unit used to compute how those fees are totaled.

Step by Step

1 View the existing Fee Unit Types.

- Open the **Fee Unit Type Maintenance** window (LP> Maintenance> Fee Unit Type).
- The left section of the window will display all of the fee unit types that have been created in the LP module. Select a fee unit type in the left section of the window and the information attached to that fee unit type will populate in the Maintenance section to the right.
- Highlight a fee unit type and press DELETE or click the Delete icon if you would like to delete a fee unit type.
    - You cannot delete a fee unit type that is attached to an active fee.

- Press INSERT or click the Create icon ⬚ if you would like to create a new fee unit type. This will create a new line item in the left hand portion of the window and the fields in the Maintenance section will be enabled to enter the fee unit type information.

2   Create a new Fee Unit Type.

- The **Unit Type** field is used to identify a unique fee unit type. The unit type code can be up to 20 alphanumeric characters.

    - Once a Unit Type is saved, it cannot be edited.

- The **Description** field is used to enter a description on the fee unit type. This optional description can be up to 60 characters long.

- Click the Save icon 💾 or press ENTER to save the fee unit type.

LP> Maintenance> Forms

Create a Form in LP

Summary

Forms refer to Microsoft Word documents that, through the use of merge fields, allow users to pull data from the application and customize how that data is displayed on the forms. Forms will be saved in the Springbrook folder on your server at the path specified when the application was installed (SS> Utilities> System Setup> System tab> Archive Directory field).

The forms will be saved as .sbw files in this folder and should not be edited to avoid corruption. Forms can be attached to various application elements through the module process and maintenance palettes.

Follow this process to create forms to attach to License and Permits processes. The forms set up in the LP module will not be accessible in other modules that use forms.

Step by Step

1 View the existing Forms.

- Open the Word Merge Form Selection window (LP> Maintenance> Forms).

- The Word Merge Form Selection window will display all of the forms created in the application. Use the search criteria fields to filter the displayed forms.

- Highlight a form and click the Preview icon to view the selected form. This will open the MS Word document in a new window.

- Highlight a form and click the Copy icon to copy the selected form. This will create a copy of the original form.

- Highlight a form and click the Delete icon or press DELETE to delete the selected form.

- Highlight a form and click the Modify icon or press ENTER to open and edit an existing form.

- Click the Create icon or press INSERT to create a new form. This will open the Word Merge Form Maintenance window.

2   Create a new Form.

- Enter a unique **Form Name** for the form. The field can be up to 32 characters long. Once the form has been saved, you will not be able to edit this field.

- Enter an optional form **Description**.

- The **System** field will automatically populate with LP. This cannot be edited.

- Use the **Process** drop-down menu to select which LP process the form will be used in. Once the batch process is specified, the form will only be available in that process.

- After you have specified the form details, click the Create icon to create the form. This will open a new Word document.

  - Once the Word document is open, use the insert merge fields command in Word to specify the data fields you want displayed on the form. For instance, the merge field Expiration_Date is the license expiration date. By inserting this merge field into the Word document, and then attaching the form to an LP process, the form will display the data found in the Expiration Date field of the license included in the process.

  - Images, charts, tables, etc. can also be inserted into the Word document.

- Once you are finished creating/modifying your form, be sure to save the form both on the Word document (File> Save) and using the Save icon on the Form Maintenance window.

- The new form will now be available when creating form letters in the specified LP process.

LP> Maintenance> Licenses

Create a License in LP

Summary

Follow this process to create a license or application in the LP module.

Step by Step

1 View the existing licenses.

- The **License Selection** window (LP> Maintenance> Licenses) will display all licenses and open applications that have been created in the LP module.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon to filter the licenses and applications that will display in the window.
- Highlight a license or application and click the Delete icon to delete the selected license.
  - A license or application that has been issued to an active customer, a customer in an open batch or an AP vendor cannot be deleted.

- Highlight a license or application and click the Modify icon to open an existing license.

- Click the Create icon to create a new license or application.

2   Create a new license or application.

- Click the Create icon to open the **License Maintenance** window.

- Complete each of the tabs on the License Maintenance window.

- If you are creating a license from an existing application, click the Generate icon and save the new license.

3   Complete the General tab.

- Click the **Operation** drop-down menu to specify whether this will be a new Application or a new License.

- Click the **Category** drop-down menu to select Business, Pet or Vehicle as the category for the license.

  - The Category selection will determine what information is displayed to the right.

- Click the **License Type** field label to specify a license type for the license or application. Every license or application must be associated with a license type.

  - License types make creating licenses simpler and less time consuming. License types dictate the fee codes and forms that will be used on the license. By creating a number of different license types based on these characteristics, you are not required to attach fee codes, forms, and other miscellaneous information to each license you create. You simply attach the license type to the license that should contain this information.

  - The use of license types also allows you to classify similar licenses with each other for reporting purposes. License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type Maintenance).

- The **Application Number** field will automatically populate with the next available application number when the application is saved.

- Enter a **License Number** if you are creating a new license.

  - The License Number field will not be active if the attached License Type is set up for auto numbering (LP> Maintenance> License Type> Auto Number field).

- Enter a **Business Number** or click the field label to choose one from a list. Businesses are created and maintained on the Business Maintenance window (BT> Maintenance> Business).

  - A business can be attached to the license after the license has been created.

- Enter the company name in the **Doing Business As** field.

- The **Customer Number**, **Customer Name**, **Lot Number**, **Service Address**, **Lot Owner Name** and **Lot Owner Address** fields will automatically populate with the information associated with the selected business number.

- If the Customer Number does not automatically populate, or if you are creating a license or application for an individual rather than a business, you must click the field label and select a customer from the list. This is a required field.

- The **Outstanding Bills**, **Unapplied Credits**, and **License Balance** fields are inactive and will populate with financial data as transactions are processed on the license.

- The **Web Registration Key** field is used to record the registration key if the license has been set up to use the Business Licensing or Business Licensing and Tax online applications.

  - Click the Generate Web Registration Key icon 🔑 above to generate a registration key for the selected license.

- Click the **License Status** field label to specify a license status for the license.

  - The License Status field will automatically populate with the status specified on the License Type selected above.

    - The license status will automatically update as the license progresses through events specified on the License Type Maintenance window. For example, if the selected license type has a Status On Application of "APP" and a Status On New License of "NEW", the License Status field will display "APP" if it is created as an application and "NEW" if it is created as a new license or created from the application.

  - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status Maintenance).

- Select an **Application Date** from the drop-down menu. This field will default to today's date but can be edited.

- The **Issue Date** is the date that the license is physically delivered to the business or customer. This date does not have to be the same as the Start Date.

    - The Issue Date field will automatically update to today's date when generating a license from an existing application.

- The **Start Date** field will automatically populate with the start date specified on the License Type selected above. This is the date that the license is considered active and the license term begins.

- The **Duration**, **Duration Units**, and **Expiration Date** fields will populate with the information attached to the selected License Type.

    - The Expiration Date is tied to the Start Date, and will reflect a time period established by the values in the Duration and Duration Units fields.

- The **Print Date** field will automatically populate with the last date that the license was printed.

- Enter an optional **Description** for the license.

    - This field can be up to 1024 characters long.

- The **License History Summary** will display a brief summary of the license history displayed on the History tab. This is not meant to be detailed and comprehensive. It is simply meant to provide a quick overview of the important dates in the license history.

- Check the **Do not renew** toggle to exclude this license from a renewal letters batch.

- Check the **Notification** toggle to generate a letter for the customer attached to the license when the license is included in an LP Letters batch.

- Check the **Charge Exempt** toggle if this license is being issued to an organization that has been deemed exempt from the standard licensing fees.

- This toggle can be used to issue supplementary licenses that must be associated with a primary license but do not require additional fees. This toggle is also often associated with organizations such as churches or non-profits.

- Licenses set up as charge exempt cannot be included in the renewals process.

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4 Complete the category-specific section of the General tab.

- The category-specify section of the General tab will change based on the selection in the **Category** drop-down menu.

- Add business types to the license or application if Business is selected.

  - Click the Create icon to attach a business type to the license. This will open the Business Types selection window.

    - The **Business Types** selection window will display all business types that have been created in the LP module. Business types are created on the Business Type Maintenance window (LP> Maintenance> Business Types).

    - Highlight a business type and click the Confirm icon to attach a business type to the license.

- If Pet or Vehicle is selected from the Category drop-down menu, enter the pet or vehicle information in the available fields.

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5   Transmit Customer or Lot data to a web site.

- Click the Launch URL icon drop-down menu and select a URL type code to transmit data from the customer or lot records associated with the license to the web site attached to the URL type code.
    - This icon is accessible from any tab on the License Maintenance window.
- If your organization uses third-party web sites for tasks such as lot mapping or license applicant background checks, URL type codes can help improve efficiency by reducing data entry.
- URL type codes are created and maintained on the URL Setup window (SS> Maintenance> URL Setup).

6   Complete the Fees tab.

- The **Fees** tab will display any fees attached to the license or application.
    - All fees attached to the License Type selected on the General tab will be displayed in the data grid.
    - Only those fees that are associated with the same status as the license or not associated with a status at all will be applicable in Cash Receipts.
- Click the Create icon to add a Fee to the license.
    - Edit the **Number of Units** field if desired. If the License Type selected has a fee code attached that uses units for rate calculations, the appropriate Unit Type will be displayed.

- The **Amount** field will automatically update to display the total amount incurred by the fee.
- Fees are created and maintained on the Fee Maintenance window (LP> Maintenance> Fee).

7   Complete the History tab.

- The **History** tab is used to track the committed and uncommitted transaction line items on the selected account. The lower section of the tab displays the transaction type details.
- Uncommitted transactions will display in red and committed transactions will display in black. Committed transactions will also have a date in the **Post Date** column.
    - The Post Date column displays the date that the transaction has been committed. This is the date the batch was committed, it is not necessarily the same as the date the transactions are posted to the general ledger or the transaction date.
- Click the Expand button to view the line item detail of a transaction.
- You can export the transactions that display in the window to a MS Excel spreadsheet by right clicking on the data in the tab and selecting Export grid contents to Excel. All transaction line items will display on the export, even line items that have not been expanded. This feature allows you to create a quick report of the history of a customer account.
- The History tab will not display any license history until the first transaction is attached to that license.

8   Complete the Approval tab.

- The **Approval** tab of the License Maintenance window allows you to attach approval steps to the license.
    - Approval types are created and maintained on the Approval Type Maintenance window (LP> Maintenance> Approval Type).
- Click the Create icon ![icon] drop-down menu and select Add Approval to open the **Approval Type Selection** window.
    - The Approval Type Selection window will display all of the approval types created in the LP module. Select an approval type and click the Confirm icon ![icon] to return to the Approval tab.
- Each approval type attached to the license constitutes a new approval step. These approval steps can be set up to notify a particular user, update the license status, apply a fee or attach an alert code to the license when the step is approved or failed.
    - If multiple approval steps should be started at the same time, assign the same step number to those steps.
- Click the Create icon ![icon] drop-down menu and select Add Approval Contact to add a contact to the approval step.
    - Contacts are created and maintained on the Contact Maintenance window (LP> Maintenance> Contact Type).
- Use the Up ![icon] and Down ![icon] icons to reorder the approval steps.

9   Complete the Comments tab.

- The **Comments** tab of the License Maintenance window allows you to insert and store comments about the selected license.

- Click the Create icon to add a comment code to the account. This will open the Comment Code Selection window.

    - Highlight a comment code and click the Confirm icon to attach the code to the account.

    - Enter a detailed comment in the **Comment** field. This is an optional field and can be up to 512 alphanumeric characters long.

    - The **Date Created** field will default to today's date.

- Comment codes are created and maintained on the **Comment Code Maintenance** window (LP> Maintenance> Comment Code).

10   Complete the Contacts tab.

- The **Contacts** tab of the License Maintenance window allows you to insert and store information about individuals who are associated with the selected license.

- All the contacts currently attached to the business will display on this tab.

    - Use the filter options and click the Refresh icon to filter the displayed contacts.

- Highlight a contact and click the Delete icon to remove the selected contact.

- Click the Create icon ⬜ to attach a new contact to the license. This will open the Contacts selection window.

  - Select a contact and click the Confirm icon ✅ to attach a contact to the license.

- Contacts are created and maintained on the Contact Maintenance window (LP> Maintenance> Contact Type).

11 Complete the Forms tab.

- The **Forms** tab will display any forms attached to the license.

- Click the Create icon ⬜ and select one of the available form letters to attach that form letter to the license.

- Forms are created and maintained on the Forms Maintenance window (LP> Maintenance> Forms).

12 Complete the Alert tab.

- The **Alert** tab will display all of the existing alerts attached to the license.

- Highlight an alert code and click the Delete icon 🔳 or press DELETE to remove the selected alert code from the license.

- Highlight an alert code and click the Modify icon 📝 or press ENTER to edit the selected alert code.

- Click the Create icon 📄 or press INSERT to attach a new alert code to the license. This will open the Alert Code Selection window.

  - Select an alert code and click the Confirm icon ✅ to add the selected alert code to the license.

  - Alert codes are created and maintained on the Alert Code Maintenance window (BP> Maintenance> Alert Code).

- The **Description** field will automatically populate with the description attached to the selected alert code.

- Enter an **Alert Date** for the new alert code. This represents the date that the alert code becomes active.

  - This field will automatically populate with today's date.

- The **Expiration Date** is calculated by adding the alert duration specified on the selected alert code to the date specified in the Alert Date field. If the Alert Date is updated, the Expiration Date will automatically update according to this calculation.

  - The Expiration Date cannot be prior to the Alert Date.

- The **Comment** field will populate with the comment attached to the selected alert code.

- Check the **Selection Alert** toggle to activate the alert message when the license is individually selected for a batch processes such as LP Letters.

  - The selection alert will not activate if the license is included in a batch as a member of a group select during a batch generate step.

- Check the **Maintenance Alert** toggle to activate the alert message when the license is opened from any window where the license details can be maintained or edited.

- Check the **CR Receipt Alert** toggle to activate the alert message when the license is selected from the CR Cash Entry search window.

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13 Complete the Miscellaneous tab.

- The **Miscellaneous** tab allows you to build your own tables of data if there is information you want to track. This information is optional and user-defined.

- Miscellaneous field labels are maintained on the Miscellaneous Field Label Maintenance window (SS> Utilities> Miscellaneous Field Labels).

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14 Track any changes made to the license record.

- Click the Audit Trail icon to open the Audit Trail window.

- Use the **Search Criteria** section to sort the displayed audit history.

- The **Audit Trail** section will provide details about any changes made to a license record including the date of the change, type of change made, user that made the change, and data table that was edited.

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15   Print the license or permit.

- Click the Print icon 🖨 to print the license or permit. This will open the **License Print** window.

- Click the **Name** field label to open the License Setup Selection window.

  - The License Setup Selection window will display all of the license setups created in the application. License setups are used to configure how printed licenses are displayed.

  - License setups are created and maintained on the License Setup Maintenance window (LP> Maintenance> License Setup).

- The **Logo Location** field is used to specify where the organization logo will display on the printed license header.

  - The logo location will affect how the Header 1-3 fields specified on the license setup will be displayed.

- The **Licenses Per Page** field is used to specify whether you would like to print one license per page or three licenses per page. Because you are only printing the open license, only one license will print on the top 1/3 of the page.

  - The Fee Options field will automatically be set to None if you choose to print three licenses per page.

- The **Fee Options** field is used to specify whether the printed report will display no fee information, fees only, fees and units, or fees, units and descriptions.

- The **Printer Adjustment** field is used to adjust where the first line of the statements will print. If you adjust the alignment of the statements you may want to print a test statement before printing a large batch.

- Zero is the system default. Adjusting the value up will move the first line of the statement up on the printed page and adjusting the value down will move the first line down.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

LP> Maintenance> License Class

Create a License Class in LP

Summary

License Classes can be used to further classify your Licenses. They are associated with License types. For example, groups of Licenses types could be classified as residential, commercial, industrial or home based. License Classes are primarily informational and are available for reporting purposes.

Step by Step

1   View the existing license classes.

- Open the **License Class Maintenance** window (LP> Maintenance> License Class).
- The left section of the window will display all of the license classes that have been created in the application. Select a license class in the left section of the window and the information attached to that license class will populate in the Maintenance section to the right.

- Highlight a license class and press DELETE or click the Delete icon if you would like to delete a license class.

    - A license class cannot be deleted if it is attached to a license type. License classes are attached to license types on the License Type Maintenance window (LP> Maintenance> License Type> Open a license type> License Class field).

- Press INSERT or click the Create icon if you would like to create a new license class. This will create a new line item in the left section of the window and the fields in the Maintenance section to the right will be enabled.

2 Create a new license class.

- The **Class** field is used to identify a unique license class. The class field can be up to 20 alphanumeric characters long.

- The **Description** field is used to enter a description for the license class. This optional description can be up to 60 alphanumeric characters long.

- Click the Save icon when complete.

LP> Maintenance> License Setup

License Setup Maintenance

Summary

The License Setup Maintenance window is used to configure how printed licenses and permits will be displayed.

Step by Step

1   Open the **License Setup Maintenance** window (LP> Maintenance> License Setup).

- The License Setup Maintenance window will display all of the existing license setups. Highlight a license setup on the left side of the window and the setup details will be displayed in the Maintenance section on the right.

- Highlight a license setup and click the Delete icon the delete the selected license setup.

- Click the Create icon to create a new license setup. This will create a new line item on the left side of the window and enable the Maintenance fields on the right.

2 Create a new License Setup.

- Enter a unique **Name** for the license setup.

  - Once you save the new license setup, the name field cannot be edited. This field can be up to 50 characters.

  - This is the only required field when creating a new license setup.

- Enter an optional **Description** for the new license setup.

  - This field can be up to 60 characters long.

  - The Name and Description fields are for identification purposes only and will not be displayed on the printed license or permit.

- The **Header 1-5** fields are used to add up to five header fields to the printed license or permit. Each of the header fields can accommodate up to 20 characters.

  - The Header 1-3 fields will be displayed along the top of the license, with Header 1 positioned at the top left, Header 2 at the top right, and Header 3 just below Header 2. These are the default positions, and if you elect to include an organization logo when printing the license or permit, these positions will be adjusted accordingly.

  - The Header 4 field will be displayed on the right side of the license, just below the Memo field.

  - The Header 5 field will be displayed on the right side of the license, below the license details.

- Enter a **Memo** for the license setup.

  - The memo will be displayed just below the license or permit header.

  - This field can be up to 500 characters long.

- Click the Save icon when complete.

- When you print a license from the License Maintenance window (LP> Maintenance> License> open a license> Print icon), the **License Print** window will open. From this window, you will be able to select which License Setup you would like to use to print the license.

- Print a test license or permit using the new license setup and make any adjustments that are needed.

LP> Maintenance> License Status Maintenance

License Status Maintenance

Summary

License Statuses are primarily used for informational and reporting purposes. Licenses can be set up to automatically change to a particular status when a specified event takes place. For example, you could create OutPay and PayFull statuses. Any license that has been approved but not paid in full would be associated with the OutPay (outstanding payments due) status. Once the license fees are paid in full, the license status would switch to PayFull (paid in full).

Step by Step

1   View the existing license statuses.

- Open the **License Status Maintenance** window (LP> Maintenance> License Status).
- The left section of the window will display all of the license statuses that have been created in the application. Select a license status in the left section of the window

and the information attached to that license status will populate in the Maintenance section to the right.

- Highlight a license status and press DELETE or click the Delete icon if you would like to delete a license status.

  - A license status cannot be deleted if it is attached to an active license. License statuses are attached to licenses on the License Maintenance window (LP> Maintenance> License).

- Press INSERT or click the Create icon if you would like to create a new license status. This will create a new line item in the left section of the window and the fields in the Maintenance section to the right will be enabled.

2 Create a new license status.

- The **Status** field is used to identify a unique license status. The status field can be up to 10 alphanumeric characters long.

- The **Description** field is used to enter a description on the license status. This optional description can be up to 60 alphanumeric characters long.

- Click the Save icon when complete.

LP> Maintenance> License Types

Create a License Type in LP

Summary

A License Type is a collection of fee codes, forms and other miscellaneous information that is used in conjunction with a particular type of license. By creating a number of license types, you can attach the license type to each new license or application you create rather than having to attach fee codes, forms, and other info to each new license or application created. The use of License Types makes the creation of licenses more efficient. It also lends itself to various forms of license classification for reporting purposes.

If you edit an existing License Type, any licenses created with that type will not auto-matically update with the new License Type settings. Use the License Update process (LP> License Update) to update multiple licenses.

Step by Step

1   Open the License Type Selection window.

- The **License Type Selection** window (LP> Maintenance> License Type) displays all the license types created in the application.

- The license types that are displayed in the window can be filtered by entering a specific **License Type** or selecting a **Category** and clicking the Refresh icon .

- Highlight a license type and click the Delete icon to delete the selected license type.

    - License types that are attached to active licenses cannot be deleted.

- Highlight a license type and click the Modify icon or click the Create icon to open the **License Type Maintenance** window.

2 Create a new License Type.

- The **License Type Maintenance** window displays the license type details.

3 Complete the General tab.

- Enter a unique **License Type**.

    - The license type can be up to 16 alphanumeric characters.

- Select a **Category** from the drop-down menu to associate with the license type.

    - License categories include Business, Pet and Vehicle.

- Enter a **License Class** or click the field label to choose one from a list.

  - License classes are user defined classifications of license types.

  - License classes are created and maintained on the License Class Maintenance window (LP> Maintenance> License Class).

- The **Auto Number** field is used to determine if any licenses generated from this license type will be automatically numbered or manually numbered.

  - If No is selected, the user will be required to enter a unique license number for every license generated from this license type.

  - If Yes is selected, the license number created for each license generated from this license type will be determined by two things:

    - The first part of the license number will be the prefix entered in the **Auto Number Prefix** field below.

    - The second part of the license number will be the next available number with the number of digits specified on the LP Setup window (LP> Utilities> Setup> **Auto-Numbering Digits** fields).

    - An example auto-numbering format for business licenses would be BL-10-0001 (BL for Business License and 10 for 2010). In order to use this format, you would enter "BL-10-" in the Auto Number Prefix field and "4" in the LP Setup> Business Auto-Numbering Digits field.

- Specify a **Duration** for which the licenses using this license type will be active. This field will determine the expiration date of the associated licenses.

- Select a **Duration Units** from the drop-down menu to determine how the value entered in the Duration field will be calculated.

  - Duration units can be Days, Weeks, Months or Years.

- Enter a license type **Description**.

  - This optional field can be up to 60 alphanumeric characters.

- Check the **Notification** toggle if form letters should be generated for the customer attached to the license if the license is included in an LP Letters batch.

- Check the **Renewable** toggle if the licenses in this type are renewable. Licenses that are not specified as renewable will be left out of any renewal letter batches.

- Check the **Use in Renewals process** toggle to flag any licenses associated with this type as eligible for renewal through the LP Renewals batch process.

- Check the **Auto-calculate penalty** toggle if the licenses in the type should be auto-matically charged a penalty fee if the license renewal is past due and the renewal fee includes an attached penalty fee.

  - License renewals are considered past due if the renewal receipt date falls after the renewed license start date.

- Check the **Charge Exempt** toggle if licenses generated from this license type will be issued to organizations that have been deemed exempt from the standard licens-ing fees.

  - This toggle can be used to issue supplementary licenses that must be asso-ciated with a primary license but do not require additional fees. This toggle is also often associated with organizations such as churches or non-profits.

  - Charge exempt licenses cannot be renewed through the Renewals process. If both the Use in Renewals process and the Charge Exempt toggles are checked, you will receive an error message when attempting to save the license type.

- The **Status On** fields are used to specify the license status at different points in the license life cycle. These are not generally required fields, but they are required if

you plan to apply fees to the license when the license status changes.

- Click the **Status On** field label to associate a status with the displayed event. Statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

4   Complete the Fee Codes tab.

- The **Fee Codes** tab lists the fees that the system will include in the calculation when charges are generated on licenses that use the selected license type.

- Click the Create icon to add fees to the license type.

- Fee codes are created and maintained on the Fee Code Maintenance window (LP> Maintenance> Fee).

- Click the **License Status** field label to specify when the new fee will be applied to the license. When the status attached to the license changes to the status specified on the new fee, the fee will be applied to the license and will also display on the Fees tab of the License Maintenance window.

  - In order for a fee to be applied to the license based on a change in license status, the **Status On** fields on the General tab must be completed. If a fee is associated with a license status, but the license is not set up to change to that status, the fee will never be applied.

  - If you attach statuses to each of the fees, only those fees associated with the current license status will be displayed on the Fees tab of the License Main-

tenance window. If the license status changes, only those fees associated with the new status will be displayed.

- If a fee is not associated with a license status, that fee will always be applied when the license or application is created and will always be displayed on the Fee tab of the License Maintenance window.

5 Complete the Approval tab.

- The **Approval** tab allows you to attach approval steps to the license type. When the selected license type is attached to a new license, the approval steps will auto-matically populate on the new license.

    - Approval types are created and maintained on the Approval Type Main-tenance window (LP> Maintenance> Approval Type).

- Click the Create icon drop-down menu and select Add Approval to open the **Approval Type Selection** window.

    - The Approval Type Selection window will display all of the approval types cre-ated in the LP module. Select an approval type and click the Confirm icon to return to the Approval tab.

- Each approval type attached to the license type constitutes a new approval step. These approval steps can be set up to notify a particular user, update the license status, apply a fee or attach an alert code to the license when the step is approved or failed.

- If multiple approval steps should be started at the same time, assign the same step number to those steps.
- Click the Create icon 🗎 drop-down menu and select Add Approval Contact to add a contact to the approval step.
  - Contacts are created and maintained on the Contact Maintenance window (LP> Maintenance> Contact Type).
- Use the Up 🔼 and Down 🔽 icons to reorder the approval steps.

6 Complete the Form tab.

- The **Forms** tab lists the forms commonly used with licenses that use the selected license type. When the selected license type is attached to a new license, the specified forms will automatically attach to that new license. They will appear on the forms tab of the license maintenance window.
- Click the Delete icon 🗎 to delete a form to remove a form from the license type.
- Click the Create icon 🗎 to add a form to the license type.
- Check the **Default Print** toggle to specify the selected form as a form that should be printed when creating the license through the Cash Receipts module.
  - The LP Licensing window (CR> Cash Receipts> Enter Receipts> create a receipt> LP Licensing icon> Forms section) will display all forms attached to the license type. Any form with the Default Print toggle checked on the

License Type Maintenance window will automatically have the Print toggle checked on the LP Licenses window.

7   Complete the Miscellaneous tab.

- The **Miscellaneous** tab allows the user to enter miscellaneous information regarding the selected license type.
- Miscellaneous field labels are created and maintained on the Miscellaneous Field Label Maintenance window (SS> Utilities> Miscellaneous Field Labels).

8   Complete the Renewal Schedule tab.

- The **Renewal Schedule** tab will display the renewal schedule set up for the license type.
- Select a **Start Date** from the drop-down menu.
  - This field will default to the current date.
- The **Number of Years to Generate** field will determine how many years will be covered by the generated renewal schedule.
- The **Duration** and **Duration Units** fields will automatically populate with the selections made on the General tab.

- Click the Generate icon ![Generate icon] to generate the renewal schedule. The results will populate in the field below.

- Click the Save icon ![Save icon] the save the new license type.

9   Track any changes made to the license type record.

- Click the Audit Trail icon ![Audit Trail icon] to open the Audit Trail window.

- Use the **Search Criteria** section to sort the displayed audit history.

- The **Audit Trail** section will provide details about any changes made to a license type record including the date of the change, type of change made, user that made the change, and data table that was edited.

LP> Maintenance> Payment Priorities

Payment Priorities Maintenance

Summary

Payment priority codes determine the order in which fees are paid. Fees attached to higher priority level will be paid in full before fees attached to lower priority levels. If there is not enough money to pay a certain level of priority, the system will allocate the payment across all the fees with the same priority level.

Step by Step

1   View the existing Payment Priority codes.

- Open the **Payment Priority Maintenance** window (LP> Maintenance> Payment Priorities).

- The left section of the window will display all of the payment priorities that have been created in the application. Select a payment priority in the left section of the window and the information attached to that payment priority will populate in the Maintenance section to the right.

- Click the Delete icon to delete a payment priority code. You cannot delete payment priority codes that are attached to existing fees.

- Click on the Create icon to add a new payment priority code.

2 Create a Payment Priority Code.

- Enter a payment priority code in the **Code** field. This Code can be up to 10 alphanumeric characters. This field will not be enabled and available for editing after the payment priority code has been saved.

- Enter a description in the **Description** field. The Description can be up to 60 alphanumeric characters.

- Enter a **Priority** for the code. The priority can range from 00, the highest priority, to 99, the lowest priority.

- Click on the Save icon or hit the ENTER key to save the comment code.

LP> Maintenance> Pet Breed

Pet Breed Maintenance

Summary

The Pet Breed Maintenance window is used to create and maintain user-defined pet breed classifications. These classifications can then be added to pet licenses to filter the displayed license by pet breed.

Step by Step

1   Open the **Pet Breed Maintenance** window (LP> Maintenance> Pet Breed).

- The Pet Breed Maintenance window will display all of the pet breeds created in the system.
- Highlight a pet breed in the left section of the window and the breed details will populate the Maintenance section to the right.
- Highlight a pet breed and click the Delete icon or press DELETE to delete the selected pet breed.
- Click the Create icon or press INSERT to create a new pet breed. This will enable the Maintenance fields to the right.

2   Create a new Pet Breed.

- Enter a unique **Pet Breed**.

    - This field can be up to 10 alphanumeric characters long.

    - Once you save the new pet breed, the Pet Breed field cannot be edited.

- Enter an optional **Description** for the new pet breed.

    - This field can be up to 60 characters long.

- Click the Save icon to save the new pet breed.

LP> Maintenance> Query by Example

Query by Example Report

Summary

The QBE Builder reporting tool is used to create customized reports in the Licenses and Permits module. Reports are created in the QBE Builder by selecting columns, creating arguments to remove records (Transaction Date < 01/01/2021), selecting how the report will group and sort, and then defining the totals that will display on the report. After the report has been created, it can be printed out or exported into an MS Excel, MS Access or CSV format. Reports that have been created using the QBE Builder tool can be saved and generated at any point.

This document will cover how to create a specific example report that provides an explanation of primary tables, secondary tables, arguments and totals. When creating your own QBE reports, it is helpful to know the general structure of the database and how the information entered into the fields on a window will be stored in the database fields and tables.

The Table/Field help feature (Help> Table/Field) is designed to be used in conjunction with database security (SS> Security> DB Security), but it can be helpful when building QBE Reports to help you determine where the information entered into a field on a window is stored. This tool will not always be helpful because it will display the exact name of the table and field where the information is stored, but QBE Builder uses simplified and more intuitive field and table names.

The report we will create in this example is a list report of the expiration dates for all LP module Business licenses within a License Type labeled "Restaurant". License Types are user-defined, so the types available in your QBE report may be different than those in this example. Every module with a QBE reporting tool offers a different example report, so if the report you want to create is different or more complicated than the report created in this example, refer to the QBE examples in other modules for more help. The QBE Report feature works the same in all of the modules, but the information that is available to report on is different from module to module.

Step by Step

1   View the QBE Reports.

- Open the **QBE Maintenance** window (LP> Maintenance> Query by Example).
- The QBE Maintenance window will display all of the reports that have been created in the LP module. Select a report in the left section of the window and the customized report information will populate in the right section of the window just like many of the other maintenance windows in the application.
- Highlight a report and press DELETE to delete the highlighted report.
- Click the Create icon or press INSERT to create a new QBE report.
- Highlight a report and click the Print icon to print an existing QBE report. The QBE report will be generated as soon as the resources are available on the server.

You can view the progress of the print job using the Jobs Viewer window (Jobs Viewer icon ⊕ on the main application window).

- Highlight a report and click the Export icon 📥 drop-down and select Export Report to export the highlighted report data.

- Highlight a report and click the Export icon 📥 drop-down and select Export Definition to export the report definitions of the highlighted report. This exported report definition file can then be imported using the Import icon 📥. This allows organizations to share QBE reports.

2 Select the tables that contain the information you would like to include on the report.

- The first step in creating a customized report is selecting the information you would like to display on the report. Information in a database is organized into tables and fields. Fields are used to store specific information, such as customer names. Fields are then grouped into tables. For example, a grouping could consist of a customer table that contains all of the general customer information, such as address and phone number. When information is entered into a window in the application, that information is stored in a specific field within a specific table. When creating a QBE report, select the tables that contain the information you would like to include on the report and then select the fields.

- Select a table from the **Table Name** drop-down menu in the Primary Table section. The Available Fields section will populate with the fields grouped into that table. If

the table you select does not contain all of the fields you want to report on you will have to select a secondary table.

- Some tables in the database are linked together because they share a common field called a key. The key connects the data in the two tables together and defines how the data in one table is related to the data in another table. If the table you selected in the **Table Name** drop-down menu in the Primary Table section is linked to other tables, you can select a secondary table in the Secondary Table section. As you select a secondary table from the Table Name drop-down menu, new fields will be added at the bottom of the Available Fields section. If you need information from two different tables, but those tables are not linked together, you will not be able to create the report.

- From the **Table Name** drop-down menu in the Primary Table section, select **License Master**.

3   Select the fields you would like to include in the report.

- After you have selected the tables you can pull the fields from those tables onto the report. Check the toggles of the fields you would like to include on the report in the **Available Fields** section. Only fields with a check will display on the report.

- In the **Available Fields** section, check the License Number, Expiration Date, Do Not Renew, Doing Business As, and Business Phone toggles. These are the columns that will show up in the report.

4   Create a filter argument for the report.

- The fields below the **Table Name** drop-down menu are used to create an argument that will filter the information that will display on the report. These arguments are limited to 2048 characters.

- In order to filter the report to only include Business licenses that fall within the "Restaurant" license type, we need to create an appropriate argument.

  - Select **Category** from the first drop-down menu directly below the Table Name field. Selecting a value for this field activates the two fields to the right.

  - The next field contains the operators that will give the argument meaning. Select **Equals** from this drop-down menu.

  - Type **Business** in the third argument field.

  - Click the Add button to save the argument to the Primary Table field.

  - Click the AND button to add the second part of our argument.

    - The AND and OR buttons will be enabled after you add the argument to the report. The AND and OR buttons are used to link the conditions of an argument together so you can build more complicated filtering.

      - The brackets are used to define the order in which the AND and OR statements will be applied. Arguments within brackets will be calculated before arguments outside of brackets. For example, you can create an OR statement inside an AND statement using the following format: (statement 1 OR statement 2) AND (statement 3 OR statement 4). The OR statements inside the brackets will be processed first, and then the AND statement will be applied.

- Select **License Type** from the first drop-down menu directly below the Table Name field. Selecting a value for this field activates the two fields to the right.

- The next field contains the operators that will give the second argument meaning. Select **Equals** from this drop-down menu.

- Type **Restaurant** in the third argument field. Confirm that the license type is spelled correctly. If not, your report will not return the desired results.

- Click the Add button to save the argument to the Primary Table field.

- Click the Test Query icon 🪄 to confirm that the query is valid and will return results.

- Enter the arguments in the Secondary Table section.

  - When you enter an argument in the Primary Table and the Secondary Table section the arguments will be joined with an AND statement, meaning records must meet the conditions in both section before they will display on the report.

    - Our example does not use a secondary table.

5 Set the number of records that will display on the report.

- The **Limit** field in the Primary Table section is used to define the maximum number of records that will display on the report. If you set this value to a very large number (such as 10,000,000) you run the risk of creating a report that will take a long time for your server to process.

- Enter **50** in the Limit field to limit our LP restaurant licenses report to 25 results.

6 Modify the report layout.

- After the fields have been selected and the arguments have been entered on the report you are ready to set up the report layout. The report layout allows you to define how the report will be grouped and totaled, and also allows you to select which fields will total.

- Click the Modify Report Layout icon to open the **QBE Layout** window.

- Move the columns that display in the QBE Report Layout section to change the order in which the information will display on the report.

- Move column headings to the section above the column headings to change how the information is grouped on the report.

- The **Column Totals** section is used to select which columns should be totaled on the report. Check the toggle of the totals you would like to include on the report.

  - Only columns that would provide a meaningful total will be available in the Column Totals section.

  - Our report does not use totals.

- Click the Confirm icon when complete to save the report layout. The QBE report will print in the saved format when the report is generated.

7 Save the report.

- Enter a name for the report in the **Report Name** field.

- Click the Save icon when complete.

---

8   Print or export the report.

- Press ENTER or click the Print icon to generate the report.

- Click the drop-down arrow next to the Export icon to select the export format. A window will open allowing you to select the path where the exported file will be created.

- If your report appears to be missing information but your filters seem to be correct, make sure the **Limit** field in the Primary Table section contains a large enough number to contain all of the records you want to include in the report.

LP> Maintenance> Queue

Queue Maintenance

Summary

Licenses and Permits module Queues are user defined groups of employees used to specify who is responsible for approving or failing an approval step on a license. Queues are attached to Approval Type codes that are then attached to licenses on the Approval tab (LP> Maintenance> License> Approval tab). When an approval step is approved, the members of the queue assigned to the following approval step will be notified that the license requires their attention.

Step by Step

1   Open the Queue Selection window (LP> Maintenance> Queue).

- The **Queue Selection** window will display all of the existing Queues in the application.
- Click the Delete icon to remove a highlighted queue.
  - You will not be able to delete a queue that is attached to an approval step on an LP license.

- Highlight a queue and click the Modify icon ![modify] to edit the selected queue.

- Click the Create icon ![create] to create a new queue. This will open the **Queue Main-tenance** window.

---

2 Create a new queue.

- Enter a **Queue** name. This is the name that will be used to recognize the queue when selecting it.

  - This field can be up to 32 characters long.

  - Once you save the new queue, you will not be able to modify this field.

- Enter an optional queue **Description**.

  - The description field can be up to 128 characters long.

- The **Queue Members** section is used to add Springbrook users to the queue. You must have at least one user attached to a queue.

  - Click the Create icon ![create] to add a new user to the queue. This will open a list of users to select from. The user information will display in the window.

  - To delete a user from the queue, highlight the user and click the Delete icon ![delete].

- Click the Save icon ![save] when complete.

LP> Maintenance> Remit Address Maintenance

Remit Address Maintenance

Summary

The Remit Address is the address of the organization office that is designated to receive remittances. The remit address will appear on printed LP Adjustments and Past Dues Statements.

Step by Step

1   View the existing Remit Address Codes.

- Open the **Remit Address Maintenance** window (LP> Maintenance> Remit Address).

- The Remit Address Maintenance window will display all of the remit address codes that have been created in the application.

- Highlight a remit address code and click the Delete icon to delete the selected remit address.

- Edit a remit address code by highlighting the code in the left section of the window and editing the remit address information in the Maintenance section of the window.

  - Once a remit address has been saved, the remit address code cannot be edited.

- Click the Create icon to create a new remit address code.

---

2 Create a new Remit Address Code.

- Enter a unique remit address **Code**.

  - This required field can be up to 20 alphanumeric characters long.

- Enter an employee name in the **Address Care Of** if a specific employee should be notified upon receipt. This is similar to an Attention field on a postal address.

- Complete the remaining remit address information fields.

- Click the Save icon the save the remit address code.

LP> Past Dues

Process Past Dues in LP

Summary

Once charges have been generated on licenses, Past Dues can be assessed and Statements can be generated. Follow this process to generate Past Dues in the LP module.

Step by Step

1 Create a new Past Dues batch.

- Select the **Past Dues** palette in LP> Past Dues. This will expand the Past Dues palette and display the steps in the Past Dues process.

- Select New from the Past Dues batch number drop-down menu to create a new batch. This will open the **New Batch** window.

  - If there are open batches in the Past Dues process, you can create a new batch without affecting the open batches.

- Enter a **Batch Month** and **Batch Year**. These fields will default to the current fiscal period and fiscal year. These values are used for reference only, and are not necessary the fiscal month and year the transactions in the batch will be posted to. The

fiscal period the transactions are posted to is determined by the journal Entry date entered when creating the GL Distribution List report.

- Type in a batch number and click the Save icon or press ENTER to create a batch in the current batch month and year.

  - To automatically create a batch with the next available batch number (the highest batch number used in the present month plus one), click the Generate icon .

- The batch number is used to identify a specific batch. Batch numbers are limited to five digits and must be unique with the batch month of the batch year.

- You can have more than one open batch in a process at a time.

- If there is an open batch, the batch with the lowest batch number and fiscal period will open. Select a batch from the drop-down menu at the top of the palette.

- You can delete batches by selecting a batch and pressing DELETE.

2   Generate Past Dues.

- Open the **Generate Past Dues** window (LP> Past Dues> Generate).

- Select the **License Types** you would like to include in the batch.

  - Click the Select All or Deselect All icon drop-down menus to select or deselect all of the displayed License Types. All License Types are selected by default.

- These icons can be used to select or deselect the Categories and Statuses as well.

- License Types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Types).

- Select the license **Categories** you would like to include in the batch.

  - Categories are attached to licenses on the License Maintenance window (LP> Maintenance> License> Category drop-down menu).

- Select the license **Statuses** you would like to include in the batch.

  - License Statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- The **Aging Date** tells the system to ignore all transactions after the date entered in this box.

- The **Transaction Date** is the transaction date that will be associated with the new penalty charge being generated.

- The **Due Date** is the date that the new penalty charge being generated is due.

  - The Transaction and Due dates can also be used for calculating penalties in future Past Due batches. If an account included in the current Past Due batch remains unpaid, the transaction or due date specified here can be used in a future Past Due batch to calculate a new past due penalty that includes the past due penalty generated from the current batch. This will require that the **Include previous penalties in past due amount** toggle is checked and the past due penalty fee code applied in the current batch includes an attached late fee (LP> Maintenance> Fee> **Late Fee** field).

- The **Minimum Age** will cause the process to ignore all transactions with an age less than the minimum age. Enter the minimum age in days.

- The **Maximum Age** will cause the process to ignore all transactions with an age greater than the maximum age. Enter the maximum age in days. If you want to include all transactions enter 999 in the Maximum Age field.

- Click the **Age From** drop-down menu to specify Due Date, Post Date, or Transaction Date as the age from date.

- There are three rounding choices in the **Round** drop-down menu.

    - Round Up will round all amounts up to the next increment you have specified in the Round To field. If you round to the nearest dollar and a penalty is calculated at $1.01, Round Up will make that a $2.00 penalty. A penalty calculated at $1.99 will also round to $2.00.

    - Round Down will round all amounts down to the previous increment you have specified in the Round to the nearest field. With this choice, if you have specified $1.00 in the Round to the nearest field, and the penalty is calculated at $1.99, it will round down to $1.00. Also, a penalty calculated at $1.01 will round to $1.00.

    - Select Off to round consumption up if the consumption decimal amount is 0.5 or greater and down if the decimal amount is less than 0.5.

- If your penalties use percentages to calculate you can control how the system rounds the penalty amounts. The **Round To** field allows you to determine if you want the system to round to the nearest penny, five cents and so on. If you round penalties to the nearest dollar, put 1.00 in the Round to the nearest field.

- Check the **Include previous penalties in past due amount** toggle and the past due amounts on which the penalties are calculated will include any previous penalties that are past due.

- This toggle will only affect the new past due penalty calculations if the original penalty fee code applied to the account includes an attached late fee (LP> Maintenance> Fee> **Late Fee** field).

- Check the **Include uncommitted payments** toggle to include payments that have not yet been committed in the Past Dues batch.

- When finished, click the Confirm icon ✅.

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3 Edit the past dues.

- Open the **Edit Past Dues** window (LP> Past Dues> Edit).

- The Edit Past Dues window displays all of the currently generated past dues. You may edit these charges by clicking the Expand button next to a line item and modifying the amount listed in the **Penalty Amount** column.

- Check the **Print** toggle next to each of the line items you would like to include in the batch.

  - Use the Select All 🟧 or Deselect All ⬜ icon drop-down menus to select or deselect all of the displayed past due records.

  - All line items will be checked by default.

- When finished, click the Save icon 💾 to save your changes.

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4 Print the Aging Report.

- Open the **Aging Report** window (LP> Past Dues> Aging).

- The Aging report displays those licenses that have outstanding past due balances.

- Not all of the print options are enabled.

  - The toggles in the License Type, Category, and License Status fields are read-only and determined by your selections on the Generate step. You can use the Select All or Deselect All icon drop-down menus to select or deselect all of the toggles, but you will not be able select specific toggles.

- Specify an age range in the **Minimum Age** and **Maximum Age** fields.

- The **Age From** drop-down menu will be inactive as this option was specified on the Generate step.

- Select the order you would like the report to print in the **Sort By** drop-down menu.

- Specify a **Minimum Balance** to filter out transactions that fall below a particular dollar value.

- Check the **Include zero balance licenses** toggle to include licenses that have a zero balance in the report.

- Check the **Include negative balance licenses** toggle to include licenses that have a negative balance in the report.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

- Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

- The report will display the Category, Application Number, License Number, Customer Number, Balance, and the Past Due Balance for past dues Under 30 days, 30-60 days, 60-90 days, 90-120 days, and over 120 days.

5   Print the Proof List.

- Open the **Past Dues Proof List** window (LP> Past Dues> Proof List).

- Select the report type you would like to print.

  - The **Summary** report displays the Invoice Number, Transaction Date, Transaction Type, Customer Name, Application Number, License Number, Description, Amount and Report Total.

  - The **Detail** report includes the information displayed in the Summary report and also displays Fee Code, Debit Account, Credit Account and Fee Amount.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You

can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

- Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

- Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring- brook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

6   Print the GL Distribution report.

- Open the **GL Distribution Report** window (LP> Past Dues> GL Distribution).

- Enter the transaction date you want to appear in the General Ledger for this batch in the **Journal Entry** date field. This date will determine the fiscal period in which the invoices are recorded.

  - The **Fiscal Period** and **Fiscal Year** fields will populate based on the Journal Entry date selected.

- Select the **Report Type** from the drop-down menu.

  - The Summary report displays the Batch Number, Fund, Account Number, Description, total Debit Amount by account and total Credit Amount by

account. By default the report will subtotal by Fund and give you a grand total of debits and credits.

- The Detail report displays everything included in the Summary report as well as a detailed break-down of individual credits and debits for each account.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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7   Print the Past Due Statements.

- The Past Due Statements provide the complete financial detail for the account that is past due.

- Open the **Past Due Statements** window (LP> Past Due> Statements).

- Select the **Report Type** from the drop-down menu.

  - The Summary statement displays the Customer Name, Customer Address, Customer Number, Statement Date, Due Date, Invoice Description, Invoice Number, Invoice Date, invoice Due Date, Invoice Amount, Balance Due, Penalty Charged, Total Due, and Total Balance Overdue.

  - The Detail statement displays everything included in the Summary statement as well as the Line Item Description, Line Item Balance Due, and Line Item Penalty Charged.

- Use the **Printer Adjustment** field to adjust where the first line of the statement will print. If you adjust the alignment you may want to print a test statement before printing a large batch.

  - Zero is the system default. Adjusting the value up will move the first line of the statement up on the printed page and adjusting the value down will move the first line down.

- Select how you want the logo to display in the **Logo Options** field.

  - Select **All Pages** to display the logo on all pages of the statements.

  - Select **First Page Only** if you would like to display the logo on the first page of the statement only. If the statement is more than one page, the logo will not display on the second page and the space where the logo normally prints will be blank, shifting all fields on the second page up.

  - Select **Don't Print and Leave Room** if you would like to leave the space that the logo normally prints in on the top of every page, but leave the logo off the statements. If the statement is more than one page, the spacing on the second page will be the same as the first. Choose this option if you are using pre-printed statement stock with a logo at the top of every page.

- Select **Don't Print and Don't Leave Room** if you would like to print the statements without logos or blank spaces.

- If more than one statement is being printed, select how the statements are sorted in the **Sort By** field. The statements can be sorted by Application Number, License Number, Customer Number, Customer Name, or Zip Code.

- In the **Message** box, type a global message you want to print on all of the past due statements. This message will appear at the top of the statement.

- Check the **Print Perforation Line** toggle to include a perforation line at the top of the returnable section of the invoice.

- The **Remit Address** section will populate with the remit address specified on the Remit Address Maintenance window (LP> Maintenance> Remit Address).

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

8   Print the Past Due Letters. This is an optional step.

- The Past Due Letters are meant to be run in conjunction with the Past Due State-
  ments. Rather than providing the financial detail found in the statements, letters
  provide general information such as the total past due.

- Select a **Form** from the drop-down menu.

    - The printed letters will use the selected Form as a template.

    - Forms are created and maintained on the Forms Maintenance window (LP>
      Maintenance> Forms).

- The **Tran Date** field will populate with the transaction date specified on the
  GL Distribution step.

- The **Compatibility** mode toggle is used to activate compatibility mode for legacy
  forms that don't use standard Springbrook forms functionality.

    - Springbrook does not recommend using Compatibility mode as it will disable
      a number of useful form features.

- Click the Print icon to process the report immediately or enter a date and time in
  the field next to the Print icon to schedule the report to generate at a later time. You
  can view the progress of the report on the Job Viewer window (SS> Utilities> Show
  Scheduled Jobs).

    - Click the Print icon drop-down menu and select Print Preview to preview the
      report before printing.

    - Click the Print icon drop-down menu and select Excel to export the report data
      to an Excel spreadsheet as unformatted data.

- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

9 Commit the Past Dues batch.

- Open the **Commit a Past Dues batch** window (LP> Past Dues> Commit).

- The **Journal Entry Date** field determines which fiscal period the journal entries will be posted to. This field will populate with the journal entry date entered when creating the GL Distribution report. If you want to change this date, you will have to return to that step and change the JE date.

LP> Refunds

Process Credit and Deposit Refunds

Summary

Overpayments and deposits can result in a credit balance on a customer's account. In the Licenses and Permits module, you can refund these credit balances through the Refunds process.

Step by Step

1   Create an LP Refunds batch.

- Select the **Refunds** palette in LP> Refunds. This will expand the Refunds palette and display the steps in the batch process.

- Select New from the Refunds batch number drop-down menu to create a new batch. This will open the **New Batch** window.

  - If there are open batches in the Refunds process, you can create a new batch without affecting the open batches.

- Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are used for reference only. The transaction date of the refunds is set up

in the Generate step and the fiscal period the transactions are posted to is determined by the **Journal Entry Date** entered when creating the GL Distribution Report (LP> Refunds> GL Distribution).

- Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.

  - You can also manually create a new batch by entering a **Batch Number** and clicking the Save icon .

- You can delete batches by selecting a batch and pressing DELETE.

2   Generate the LP Refunds.

- Open the **Generate Refunds** window (LP> Refunds> Generate).
- Select each **License Type** that should be included in the refunds batch.

  - Click the Select All or Deselect All icon drop-down menus to select or deselect all of the displayed License Types. All License Types are selected by default.

    - These icons can be used to select or deselect the License Statuses and Categories as well.

  - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

- Select each **License Status** that should be included in the refunds batch.

  - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- The **Category** field is used to specify which combination of Business, Pet and Vehicle licenses will be included in the refunds batch.

- Select the **Transaction Type** that will be used for the refunds batch.

  - CreditCash transactions are the only transactions that can be refunded in LP.

- Click the **Age From** drop-down menu to select either Transaction Date or Post Date. This will determine which filter date you will age from.

  - The **Age From Date** will default to today's date.

  - The **Minimum Age Days** field is used to limit the licenses you would like to include in the batch by age days.

- The **New Tran Date** will default to the current date, but can be overridden. It is the date that will be associated with the refund adjustment to the customer's license.

- The **Minimum Amount** field is used to limit the refunds included in the batch to a minimum amount. Specifying a minimum amount can prevent licenses with only a negligible credit from being included in the batch.

- Check the **Allow refunds on licenses with outstanding balances** toggle if you would like to generate refunds for licenses that meet the filter criteria but still have outstanding balances as well.

  - If you would prefer to apply credits to outstanding balances, do not check the toggle. You can use the adjustments process to apply credits and deposits to outstanding balances.

- The **Licenses** field is used to add individual licenses to the refunds batch.

  - Click the Create icon ⬚ to add a license to the batch. This will launch the License Selection window.

  - Highlight the desired licenses and click the Confirm icon ✅ to add them to the batch.

    - Press SHIFT or CTRL while selecting licenses in order to select multiple licenses for refunds.

  - If individual licenses are added to the refunds batch, all other filter details specified on the Generate window will be disregarded. Only the selected licenses will be added to the batch.

  - Highlight a license and click the Delete icon 🗙 to remove it from the refunds batch.

- Click the Confirm icon ✅ to generate the refunds batch.

3 Edit the LP Refunds.

- Open the **Edit Refunds** window (LP> Refunds> Edit).

- The Refunds tab will display all of the licenses that will be included in the refunds batch.

- Click the Expand button next to a license to display the refund details.

  - The **Amount** column can be edited in the event that the actual refunded amount should be less than the generated refund amount. This amount must be greater than zero and cannot be edited to exceed the original generated refund amount.

- Highlight a license and click the Delete icon to remove the license from the refunds batch.

- The Errors tab will display all of the licenses that met the filtering requirements of the Generate step but cannot be included in the refunds batch.

  - The Warning Message column will display the reason that the license cannot be included in the batch. Licenses that meet one of the following criteria cannot be included in a refunds batch:

    - License credit is already in an open Refunds batch.

    - License credit is in an open Adjustments batch.

    - License credit is in an open Renewals batch.

- Click the Save icon if any changes were made during the edit step.

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4 Print the Refunds Proof List.

- Open the **Proof List** window (LP> Refunds> Proof List).

- Select the **Report Type** you would like to print.

  - The Summary report will display the Invoice Number, Transaction Date, Trans-action Type, license holder's Name, Application Number, License Number, transaction Description and transaction Amount. The report will also provide a total amount.

  - The Detail report will display everything included in the Summary report as well as the individual Fee Code, Debit Account and Credit Account for each refund transaction in the batch.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

5 Print the Refunds GL Distribution report.

- Open the **GL Distribution** window (LP> Refunds> GL Distribution).

- Enter the transaction date you want to appear in the General Ledger for this batch in the **Journal Entry** date field. This date will determine the fiscal period in which the invoices are recorded.

  - The **Fiscal Period** and **Fiscal Year** fields will populate based on the Journal Entry date selected.

- Select the **Report Type** from the drop-down menu.

  - The Summary report will display the Fund, Account, Description, Debit Amount and Credit Amount for each account in the batch. The report will also provide Fund and Report Totals.

  - The Detail report will display everything included in the Summary report as well as additional debit and credit information for the individual transactions in the refunds batch.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

6 Commit the Refunds batch.

- Open the **Commit Refunds** window (LP> Refunds> Commit).
- The Batch Number, Journal Entry Date, Fiscal Period and Fiscal Year fields will populate with the details specified when the batch was created.
- The **AP Settings** section is used to set up how the Account Payable invoices will be generated.
  - Enter an open **AP Batch** number or click the field label to select an open AP Invoices batch.
    - If you would like to create a new AP Invoices batch for the refunds, click the Generate icon . This will create a new batch using the next available batch number. The new batch number will populate the AP Batch field.
  - Update the **Fiscal Year** field with the up and down arrows if desired.
- Click the Confirm icon to commit the refunds batch.
- Once the batch is committed, the refund invoices will be sent to the AP Invoices process.

LP> Renewals

Generate and Edit LP Renewals

Summary

The LP Renewals process is used to generate Renewal letters and the associated renewal invoices for a filtered group of LP Licenses. In order for a license to be eligible for the Renewals process, it must be attached to a license type with the Use in Renewals process toggle checked (LP> Maintenance> License Type> General tab> Use in Renewals process toggle).

Step by Step

1   Create an LP Renewals batch.

- Select the **Renewals** palette in LP> Renewals. This will expand the Renewals palette and display the steps in the batch process.
- Select New from the Renewals batch number drop-down menu to create a new batch. This will open the **New Batch** window.
  - If there are open batches in the Renewals process, you can create a new batch without affecting the open batches.

- Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are used for reference only. The transaction date of the renewal is set up in the Generate step and the fiscal period the transactions are posted to is determined by the **Journal Entry Date** entered when creating the GL Distribution Report (LP> Renewals> GL Distribution).

- Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.

    - You can also manually create a new batch by entering a **Batch Number** and clicking the Save icon .

- You can delete batches by selecting a batch and pressing DELETE.

---

2 Generate the LP Renewals.

- Open the **Generate Renewals** window (LP> Renewals> Generate).

- Select each **License Type** that should be included in the renewals batch.

    - Click the Select All or Deselect All icon drop-down menus to select or deselect all of the displayed License Types. All License Types are selected by default.

        - These icons can be used to select or deselect the License Statuses and Categories as well.

- License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

    - Only those license types with the Use in renewals process toggle checked will be displayed.

- Select each **License Status** that should be included in the renewals batch.

    - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- The **Category** field is used to specify which combination of Business, Pet and Vehicle licenses will be included in the renewals batch.

- Enter a **New Transaction Date** and a **New Due Date** for the renewals batch.

- The **New Transaction Description** field is used to enter a description for the renewal transaction.

    - While the total character limit on this field is 512 alphanumeric characters, only the first 40 characters will display on the renewals proof list.

- Enter a **New License Status** or click the field label to select one from a list. This is the status that the License will change to when the renewals batch is committed.

    - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- Check the **Apply available credits** toggle in order to apply any available credits on an included license towards the outstanding balance on that license after it is renewed.

    - The applied credit will be displayed on the Edit window.

- The Filter tab is used to filter the licenses included in the renewals batch by issue, start and expiration date.

- Specify the desired dates to the filter the included licenses.
- The License tab is used to add individual licenses to the renewals batch.
  - Click the Create icon ⬚ to add a license to the batch. This will launch the License Selection window.
  - Highlight the desired licenses and click the Confirm icon ✅ to add them to the batch.
    - Press SHIFT or CTRL while selecting licenses in order to select multiple licenses for renewal.
  - If individual licenses are added to the renewals batch, all other filter details specified on the Generate window will be disregarded. Only the selected licenses will be renewed.
  - Highlight a license and click the Delete icon ❌ to remove it from the renewals batch.
- Click the Confirm icon ✅ to generate the renewals batch.

---

3 Edit the LP Renewals.

- Open the **Edit Renewals** window (LP> Renewals> Edit).
- The Renewals tab will display all of the licenses that will be included in the renewals batch.

- Highlight a license and click the Delete icon to remove the license from the renewals batch.

- The Errors tab will display all of the licenses that met the filtering requirements of the Generate step but cannot be included in the renewals batch.

    - The Warning Message column will display the reason that the license cannot be included in the batch. Licenses that meet one of the following criteria cannot be included in a renewals batch:

        - License is set up as non-renewable.

        - License is already in an open renewals batch.

        - License is in an open Cash Receipts batch.

        - License is in a pending web transaction.

        - License does not have any attached fees that either match the status of the license or have no defined status.

        - License is set up as Charge Exempt.

- Click the Save icon if any changes were made during the edit step.

4   Commit the Renewals batch.

LP> Renewals

Commit LP Renewals

Summary

Once the LP Renewals have been generated and edited, the batch can be committed. Follow these steps to complete the renewals process.

Step by Step

1   Print the Renewals Proof List.

- Open the **Proof List** window (LP> Renewals> Proof List).
- Select the **Report Type** you would like to print.
  - The Summary report will display the Invoice Number, Transaction Date, Transaction Type, doing business as Name, Application Number, License Number, renewal transaction Description and Amount for each license in the batch. A report total will also be provided.
  - The Detail report will display everything included in the Summary report as well as the Fee Code, Debit Account and Credit account for each transaction in the batch.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

    - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

    - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

2 Print the Renewals GL Distribution report.

- Open the **GL Distribution** window (LP> Renewals> GL Distribution).

- Enter the transaction date you want to appear in the General Ledger for this batch in the **Journal Entry** date field. This date will determine the fiscal period in which the invoices are recorded.

    - The **Fiscal Period** and **Fiscal Year** fields will populate based on the Journal Entry date selected.

- Select the **Report Type** from the drop-down menu.

  - The Summary report will display the Fund, Account, Description, Debit Amount and Credit Amount for each account in the batch. The report will also provide Fund and Report Totals.

  - The Detail report will display everything included in the Summary report as well as additional debit and credit information for the individual transactions in the renewals batch.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

3 Generate the Renewal Letters.

- Open the **Renewal Letters** window (LP> Renewals> Letters).

- Select the desired **Form** from the drop-down menu.

  - If the drop-down menu does not display any forms, you will need to create an LP-specific form before proceeding. Forms are created and maintained on the Forms Maintenance window (LP> Maintenance> Forms).

- Specify a **Transaction Date** for the letters. This field will automatically populate with the current date.

- The **Compatibility** mode toggle is used to activate compatibility mode for legacy forms that don't use standard Springbrook forms functionality.

  - Springbrook does not recommend using Compatibility mode as it will disable a number of useful form features.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

- The format and information included in the renewal letters is determined by the form selected.

---

4 Commit the Renewals batch.

- Open the **Commit Renewals** window (LP> Renewals> Commit).
- The Batch Number, Journal Entry Date, Fiscal Period and Fiscal Year fields will populate with the details specified when the batch was created.
- Click the Confirm icon to commit the Renewals batch.
- Once the batch is committed, the license status on all of the licenses included in the batch will be updated to the status specified on the Generate step.
- A new Renewals invoice line item will now be displayed on the History tab of the License Maintenance window.

LP> Reports> Aging Report

Aging Report

Summary

The aging report displays those accounts that have past due, outstanding balances.

Step by Step

1   Open the **Print Aging Report** window (LP> Reports> Aging Report).

2   Configure the report.

- Check the toggle next to each **License Type** you would like to include in the report. All license types will be checked by default.
  - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).
- Check the toggle next to each **Category** you would like to include in the report. All categories will be checked by default.
- Check the toggle next to each **License Status** you would like to include in the report. All license statuses will be checked by default.

- License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- Enter the aging date in the **Aging Date** field. This is the date used to calculate the age of the transactions filtered into the report and will determine which aging column (0 to 30, 31 to 60, 61 to 90, etc.) each transaction will be placed in.

- Enter a **Minimum** and **Maximum Age** for the licenses and applications you would like to include in the report.

- Click the **Age From** drop-down menu and select Due Date, Post Date, or Transaction Date to designate from which date the aging process will begin.

- Click the **Sort By** drop-down menu and select Application Number, Customer Name, Customer Number, License Number, or License Type to designate how the report is sorted.

- Enter a **Minimum Balance** to limit the displayed accounts by account balance.

- Check the **Include Zero Balance Accounts** toggle to include accounts that have a zero balance.

- Check the **Include Negative Balance Accounts** to include accounts that have a credit balance.

- Check the **Include previous penalties in past due amount** to include any previous penalty balances in the current balance.

- Check the **Include Uncommitted Payments** toggle to include uncommitted/pending payments when calculating the balances on invoices to be included on the Aging Report.

- The report will display the User that created the report, Date Printed, Aging Date, Category, Application Number, License Number, License Type, Customer Number, and Customer Last Name. The report will also provide a total Balance by license or

application, balance for Under 30 days, 30-60 Days, 60-90 Days, 90-120 Days, and Over 120 Days as well as a report total.

3   Print the report.

- Click the Print icon ![print icon] to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

LP> Reports> Business License Listing

Business License Listing Report

Summary

The Business License Listing report displays a filtered range of business license details.

Step by Step

1   Open the **Business License Listing** window (LP> Reports> Business License Listing).

2   Configure the report.

- Check the toggle next to each **License Type** you would like to include in the report.
  - By default, all license types will be selected. You can use the Select All ⬛ or Deselect All ⬛ icons to select or deselect all the displayed license types.
  - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

- Check the toggle next to each **License Status** you would like to include in the report.

  - By default, all license statuses will be selected.

  - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- Check the toggle next to each **Business Type** you would like to include in the report.

  - This field will only be enabled if Business is selected from the Category dropdown menu on the License tab. If Business is selected, all business types will be selected by default.

  - Business types are created and maintained on the Business Type Maintenance window (LP> Maintenance> Business Type).

- Use the **Sort By** drop-down menu to specify how the report will be sorted.

- Use the **License**, **Filters**, and **Date** tabs to filter the included licenses by the fields displayed on those tabs.

  - Select Yes in the **Show renewal history** drop-down menu to include the business license renewal history in the report. You can then use the **Number of Renewals** field to specify how many previous licenses are displayed.

- The report will include the Application Number, Business Name, Business Number, Customer Number, License Number, License Type, License Status, Lot Number, Tax Lot, Address, Application Date, Issue Date, Start Date and Expiration Date. If the renewal history is included, the Transaction Date, Issue Date, Start Date and Expiration Date of previous licenses will also be displayed.

3   Print the report.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

LP> Reports> GL Trial Balance

GL Trial Balance Report

Summary

The GL Trial Balance report displays the change in account balance of a specified customer during a specified period of time.

Step by Step

1   Open the **GL Trial Balance Report** window (LP> Reports> GL Trial Balance).

2   Configure the report.

- Enter a date range in the **JE Date From** and **JE Date To** fields.
- Select a **Report Type** from the drop-down menu.
    - The Brief report will display the GL Account number, Description, Beginning Balance, Debit Amount, Credit Amount, and Ending Balance.
    - The Summary report will display everything included in the Brief report as well as the Journal Entry Date, Application Number, License Number, Transaction Date, Transaction Type, and Transaction ID.

- The Detail report will display everything included in the Summary report as well as the Fee Code and Fee Type.

- Enter a **GL Account** for the report or click the field label to select one from a list.

3 Print the report.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

LP> Reports> License Listing

License Listing Report

Summary

The License Listing report displays a filtered range of license details.

Step by Step

1   Open the **Print License Listing** window (LP> Reports> License Listing).

2   Configure the report.

- Check the toggle next to each **License Type** you would like to include in the report.
  - By default, all license types will be selected. You can use the Select All or Deselect All icons to select or deselect all the displayed license types.
  - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

- Check the toggle next to each **License Class** you would like to include in the report.
    - By default, all license classes will be selected.
    - License classes are created and maintained on the License Class Maintenance window (LP> Maintenance> License Class).
- Check the toggle next to each **License Status** you would like to include in the report.
    - By default, all license statuses will be selected.
    - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).
- Check the toggle next to each **Business Type** you would like to include in the report.
    - This field will only be enabled if Business is selected from the Category drop-down menu on the License tab. If Business is selected, all business types will be selected by default.
    - Business types are created and maintained on the Business Type Maintenance window (LP> Maintenance> Business Type).
- Check the toggle next to each **Business Class** you would like to include in the report.
    - This field will only be enabled if Business is selected from the Category drop-down menu on the License tab. If Business is selected, all business classes will be selected by default.
    - Business classes are created and maintained on the Business Class Maintenance window (LP> Maintenance> Business Class).

- Specify how the report will be displayed on the **Layout** tab.

  - The **First Sort** drop-down menu is used to select a primary sort value for the report.

  - The **Second Sort** drop-down menu will determine how the licenses are sorted within the First Sort option.

  - The **Third Sort** drop-down menu will determine how the licenses are sorted within the Second Sort option.

  - The **Address** drop-down menu is used to specify which address attached to the license will be displayed on the report.

- Use the **License**, **Customer**, and **Date** tabs to filter the included licenses by the fields displayed on those tabs.

- The top of the report will display the filter values specified on the License, Customer, and Date tabs. The report will include the Category, Application Number, License Number, License Type, License Class, Business Number, Customer Number, Customer Name, Customer Address, Pet Tag Number, Vehicle Sticker Number, Tax Lot, Lot Number, License Status, and Balance.

3   Print the report.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

- Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

- Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

LP> Reports> Pet License Listing

Pet License Listing Report

Summary

The Pet License Listing report displays a filtered range of pet license details.

Step by Step

1   Open the **Pet License Listing** window (LP> Reports> Pet License Listing).

2   Configure the report.

- Check the toggle next to each **License Type** you would like to include in the report.
  - By default, all license types will be selected. You can use the Select All or Deselect All icons to select or deselect all the displayed license types.
  - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

- Check the toggle next to each **License Class** you would like to include in the report.

  - By default, all license classes will be selected.

  - License classes are created and maintained on the License Class Maintenance window (LP> Maintenance> License Class).

- Check the toggle next to each **License Status** you would like to include in the report.

  - By default, all license statuses will be selected.

  - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- Specify how the report will be displayed on the **Layout** tab.

  - The **First Sort** drop-down menu is used to select a primary sort value for the report.

  - The **Second Sort** drop-down menu will determine how the licenses are sorted within the First Sort option.

  - The **First Misc Field** and **Second Misc Field** drop-down menus are used to specify which miscellaneous fields are included in the report.

    - If miscellaneous fields are selected from these drop-down menus, the report will include the user-defined label of the miscellaneous field as an additional column heading. The values in these fields will be displayed below.

- Use the **License**, **Customer**, and **Date** tabs to filter the included licenses by the fields displayed on those tabs.

- The report will include the Application Number, License Number, Pet Tag Number, Status, License Type, License Class, Customer Number, Customer Name,

Customer Address, Home Phone, Pet Name, Pet Breed, Pet Color, Pet Gender and any included miscellaneous fields.

3 Print the report.

- Click the Print icon 🖨 to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

LP> Reports> Refunds

Refunds Report

Summary

Follow this process to print the LP Refunds Report.

Step by Step

1   Open the **Refunds Report** window (LP> Reports> Refunds).

2   Configure the report.

- Check the toggle next to each **License Type** you would like to include in the report. All license types will be checked by default.
    - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).
- Check the toggle next to each **Category** you would like to include in the report. All categories will be checked by default.
- Check the toggle next to each **License Status** you would like to include in the report. All license statuses will be checked by default.

- License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

- Select a Tran Date from the drop-down menu.

- Enter a **Minimum Tran Balance** to limit the displayed accounts by account balance.

- The report will display the Category, Application Number, License Number, Customer Number, License Status, Balance, Invoice Number, Transaction Type, and Transaction Date. The report will also provide a Total Refunds amount. Check the **Print Contact Information** toggle to include the Customer Name, Mailing Address, and customer Phone Number on the report.

3   Print the report.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

LP> Utilities> Setup

Set up the Licenses and Permits Module

Summary

Follow this process to set up the LP module.

Step by Step

1   Open the **License and Permits Setup** window (LP> Utilities> Setup).

2   Set up the LP module.

- Specify how the Business, Pet and Vehicle licenses will be numbered.
  - Specify the **Auto-Numbering Digits** for the licenses.
    - The software will find the largest license number with the same number of digits in the database and begin numbering from there.
    - You can have the system start auto numbering from a desired point if you create a license number higher than all the other licenses with auto

numbering turned off, then turn auto numbering on to create the rest of your licenses.

- These values must be between four and seven.

- Check the **Auto attach lots on licenses** toggle if you would like a lot to be automatically attached to a license when a customer is attached to a license.

  - If a customer is attached to a permit, and that customer is the owner of a lot, the lot will automatically be attached to the license if this toggle is checked.

- Click the Save icon 💾 the complete the set up process.

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3 Track any changes made to the LP Setup window.

- Click the Audit Trail icon 👣 to open the Audit Trail window.

- Use the **Search Criteria** section to sort the displayed audit trail.

- The **Audit Trail History** section will provide details about any changes made to the setup window including the date of the change, type of change made, user that made the change, and data table that was edited.

LP> Utilities> Change License Type

Change License Types

Summary

The Change License Type tool is used to update individual applications or licenses with a new license type.

Step by Step

- Open the **Change License Type** window (LP> Utilities> Change License Type).
- Select the **Category** of license you would like to update.
    - The category selected will determine which applications or licenses can be selected below.
- Enter an **Application Number** or click the field label to select one from a list.
- Enter a **License Number** or click the field label to select one from a list.
- The **Current License Type** field will automatically populate with the license type currently attached to the selected application or license.
- Enter a **New License Type** or click the field label to select one from a list.
    - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

- Any fees, forms and approval codes associated with the selected license type will now be associated with the application or license selected above.

- Click the Save icon to update the selected application or license with the new license type.

LP> Utilities> Generate Web Keys

Generate Web Keys

Summary

The Generate Web Keys tool is used to generate web keys for license holders. These web keys are then used by those license holders to access the Business Licensing and Licensing and Tax online applications.

Step by Step

- Open the **Generate Web Keys** window (LP> Utilities> Generate Web Keys).
- The Selection Criteria section is used to filter the licenses that will be included in the generate tool by license type and license status.
  - If web keys are generated without specifying a license type or license status, the tool will generate web keys for all existing licenses that are not already assigned a web key.
- Enter a **License Type** or click the field label to select one from a list.
  - License types are license templates used to quickly create similar licenses on the License Maintenance window (LP> Maintenance> License> General tab> License Type field).
  - License types are created and maintained on the License Type Maintenance window (LP> Maintenance> License Type).

- If a license type is not selected, the tool will generate web keys for all eligible licenses that are assigned the license status specified to the right.

- Enter a **License Status** or click the field label to select one from a list.

  - License statuses are user-defined status codes that are used to define the current status of a license. Licenses are assigned a license status on the License Maintenance window (LP> Maintenance> License> General tab> License Status field).

  - License statuses are created and maintained on the License Status Maintenance window (LP> Maintenance> License Status).

  - If a license status is not selected, the tool will generate web keys for all eligible licenses that are associated with the license type specified to the left.

- Click the Generate icon to generate web keys for all of the licenses associated with the license type and license status selected.

  - The eligible licenses will populate the Licenses data grid below and each license will be assigned a random web key.

- Click the Save icon to save the web keys to the license records.