INFORMATION MANAGEMENT SERVICES, INC.

Occupational Licenses Manager

User's Manual

Second Edition, June 2001

Version 4.412

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Getting Started

This manual is best viewed at 100% magnification or higher for details on small screens.

Welcome

Welcome to the **Occupational Licenses Manager**. The **Occupational Licenses Manager** transforms the recording and issuing of business licenses from a chaotic to an orderly process. It eliminates the annual crunch that usually occurs at license renewal time. It can be handled by a single clerk, even if you have thousands of licensed businesses. This manual is page referenced to fit a Hewlett Packard Laserjet 5N.

System Requirements

Hard disk with 10 MB free disk space
Microsoft Windows (32 bit environment only) version 3.1 or higher, Windows 95, or Windows NT 3.5 or higher
VGA graphics and monitor
Any pointing device supported by Windows
General Ledger versions 4.254 or higher to allow transfer of revenue to **General Ledger**.
Accounts Payable version 3.211 or later for viewing vendor occupational licenses.
Building Permits 4.241 to allow it to query **Occupational Licenses** data for contractor occupational licenses.

The new IMS demo and option control system works for existing users who have a license file containing installed options. If there is no license file, then certain options will not be installed on all systems. The Demo program expires 30 days after it is first used.

The IMS menu system allows running all installed IMS programs from a single login, bypassing individual program logins and splash screens.

Installation of Updates

This is where it all begins. The original program will be installed by your **Customer Support Representative (CSR).** You will need to periodically install updates as new information is added to the program. As long as your update is saved and installed into the correct directory it will be used by the original program.

When installing, TYPE in the directory (ex. C:\OL, or D:\IMS\OL, or G:\OL): you want the program to go, otherwise it tends to default to a directory that it creates below the main directory C:\OL\Occupational Licenses).

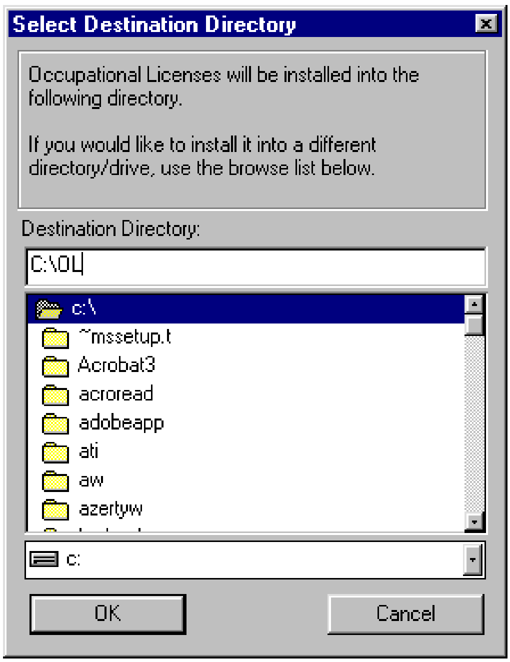
This means the program will not be installed into the original OL directory, and consequently not work. You also do not want it installed into C:\Program Files\Occupational Licenses, (the Microsoft Windows default directory) if that is not the original OL directory. This will not allow the update to work in the right directory, either.

Windows Basics for 95/98/NT Users

Start Windows if you've not already done so. Insert the Update disk into drive A (or drive B). You first need to find where your **Occupational Licenses Manager** program is installed.

Find the icon on your main screen (Program Manager) and highlight the **Occupational Licenses Manager** icon, and right click with your mouse on the icon. Select File, Properties, and click on the Shortcut Tab. The line you want to look for will be labeled as Target.

There you will be able to view the directory you need to place the update into. Once you have determined which directory to install into, you are ready to start the installation process. Left click on Start; Select Run from the File menu and then Browse, selecting the .exe file on the diskette in Drive A: and double click on the .exe file to begin the installation.

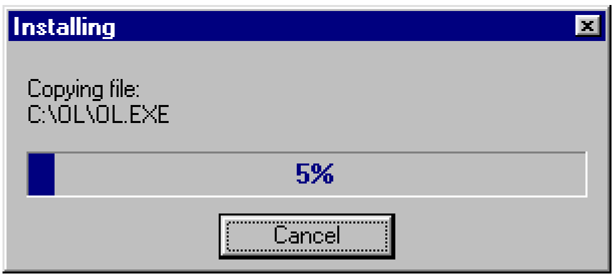


The program will start installing and you will see a blue screen, and then a welcome screen. It will ask you which directory you want to install the files into.

Make sure it is exactly where it needs to be as the data for the program is located in the same directory as the program files (see above on how to locate your directory).

In Windows 95/98/NT the default is C:\Program Files\OL. You may **not want this directory,** so TYPE IN the location to the directory you found the program in (using the directions above).

Click OK when you've entered the desired location. It will ask you if you want to make backup copies and will backup the program files that the update replaces into the same directory, into a new folder called BACKUP. After this simply follow the instructions and it installs the update for you.



After it is complete, you will be given the opportunity to view the release documentation. This is a document containing information and explanation about what is new to this version of the **Occupational Licenses Manager**, including last minute changes since the manual was printed.

The release documentation for new releases can always be viewed at the IMS website, http://www.ims-florida.com. The site will always have the latest release information. The release notes can also be viewed once the program is installed under **Help, Contents, Release Notes**.

You may link to the IMS website from within the program if you are connected to the Internet and go to **Help,** IMS Web Site.

Windows 95/98/NT Internet Users

Updating from email:

Your **CSR** will send you updates in the email if you request this method of updating. When you receive the emailed files (for example ol4348.exe, .w02, .w03), save them immediately into the directory that your program is running in. See Windows update installation instructions above to see how this is done.

The examples show c: drive, but most users will have their program located on d, g, f, or some other drive.

Once you have saved all of the files you receive in the email from IMS, then you may go into My Computer by right clicking on it, and choosing Explore. From there, you simply locate the .exe file and double click on it to run the installation, following the instructions on the screen. Remember to TYPE in which Drive and Directory you want the program to install into, such as D:\OL.

If you skip this step now, you may view the documentation later in the program itself.

Updating from a disk:

Insert the Update disk #1 into drive A (or drive B). In Win 95/98/NT right click on My Computer, select explore. Highlight the drive (A or B) that the disk is in. Find the file, Setup.exe and double click on it. (See the above installation instructions for Windows updates). Insert Disk #2 and #3 when prompted. In all of these installations you may choose to read the release notes, which are essentially the latest update information and changes to the program.

Windows Skills You'll Need

Because the **Occupational Licenses Manager** runs under Windows, it is necessary for you to have certain Windows skills to be able to use it most effectively. What follows is a very brief explanation of some of the skills that would be most useful in using your **Occupational Licenses Manager**. *This is not intended to replace your Windows manual.*

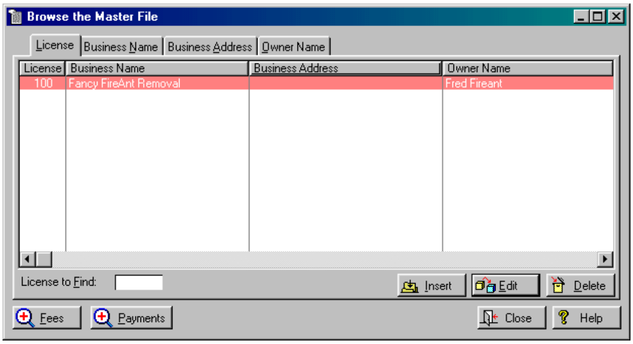
If any of these is not a skill you're comfortable with, you'll want to refer to your Windows manual for a complete explanation

Entering information on a screen

When you are entering information into many fields on a screen, such as when adding a license, use the Tab Key to move to the next field, and Shift+Tab to move to the previous field. **DO NOT** use the Enter Key. The Enter Key is the same as clicking on OK, and means you've completed your entries and are ready to move on to something else.

Control

If you don't have a good understanding of this concept, you'll spend way too much time trying to get the program to do what you want it to. When you go into a window, such as Browse the Master File, there are two areas of the window: one where the license information is and another where the **License to Find** field and buttons are.



When you first see this screen the cursor is flashing in the **License to Find** field. That means that if you press a letter (or number) on your keyboard it will appear in this field. However, if you click within the license information portion of the screen, the control moves there.

Then, when you press a letter, the program takes you to the first occurrence of that letter in the list.To move to a screen tab, simply click on it. That screen will be brought to the front.

Mouse vs. Keyboard

Throughout the manual, the mouse commands are given for procedures (e.g. "Click on OK"). If you prefer to use keyboard commands, you'll want to pay attention to the underlined letters in options throughout the program.

For example, to pull down the **File** menu, you may click on File, or you may press Alt+F. Then, when the menu is pulled down, you may click on your choice, or press the letter that is underlined in your choice. Any time there is some information that could be looked up (on a calendar or in the business codes, for example), you'll click on your right Mouse Button to see it. But you can also press F3.

Using the scroll bars

Scroll bars are found at the right edge and bottom edge of the screen when the information for the screen won't all fit on at once. You may click on the up and down arrow keys to move incrementally through the display, or drag the box up or down to move more quickly.

Moving a window

There are times when you may need to move a window to another location on your desktop. To do this, click on the title bar of the window and drag it to the new location. Then release the mouse button.

Resizing a window

Occasionally, you may want to resize a window so you can see more of its contents. To do this, click on the window.

Then, point to a corner or border of the window (the cursor will become a double-headed arrow). Drag the mouse until the window is the desired size and then release.

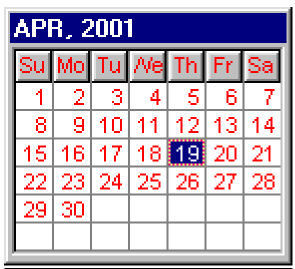
Window Setup

Go to **File, Business** or any other main screen. Then go over to **Windows** from the main list and open that at the same time. This allows you to customize your viewing capabilities.

On a drop list, press the first character of your selection to go directly to it.

Quick Tip Keys:

F1 brings up a **Help** menu for quick and easy explanation of terms. If you are in a date field, press. F3 which is <u>invaluable</u> in IMS programs will bring up a a calendar in a date field or pop up list in many other fields. <u>Always try it</u> if you need to select from a list to see if it is available this way. Press the Escape Key to release it. Right clicking on the Mouse Button will also display selections if available.



Using the Clipboard

Go to **Edit**. This menu contains the standard Windows editing functions using the clipboard. It is active only when another document window is open.

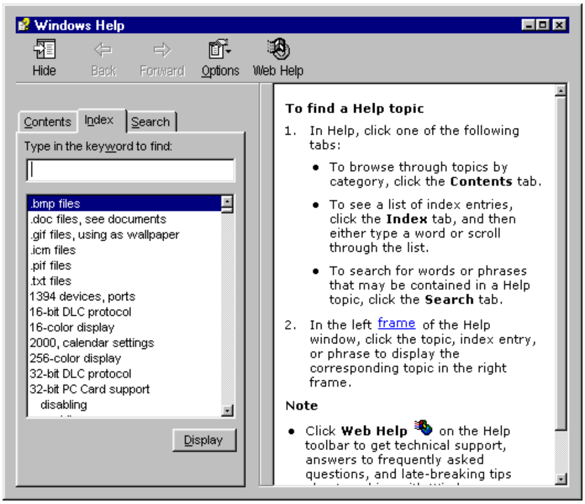
Cut (^X)
Move the currently highlighted text to the Windows Clipboard.

Copy (^C)
Copy the currently highlighted text to the Windows Clipboard.

Paste (^V)
Copy the contents of the Windows Clipboard to the field where the cursor is currently located.

Reference Help/Contents
Your program has assistance under **Help** (press F1 at any time to take you to this section) or **Contents,** which has a better overview of the entire section. It is filled with explanations of almost every function and key in the program. You may want to familiarize yourself with some of the different items in there before beginning. This makes using the program much simpler.

Windows has its own section for assistance with questions about Windows topics - **How to Use Help** within the program. Use it by looking through the Contents, the Index alphabetically, or by using the **Search for Help On….**capability to find the topic or keyword you need help with.



<u>User's Manual</u>

The manual is set up so that each main category is to the left side, each function of the program to the right is **<u>Bolded and Underlined.</u>** Fields of information and the path (i.e. **File, Setup**) are typically **bolded** so that you may recognize them easily. The explanation/steps are directly below it. The manual attempts to follow the natural progression of steps the user would normally take when running the program. If in doubt always look to the <u>Index</u> for the topic or the hyperlink (blue underlined items jump from one point of the document to another) from the page number of the item you seek. Use your Go Back Button to return to the place you were last. You may view the user manual from within the program under **Help, View User Manual** if you have Adobe Acrobat Reader.

<u>First Steps:</u>

When first starting the program, you will want to insert general information data into their particular files before adding businesses. In the next section we will go into detail for an explanation of each of these items.

From the main menu select **Setup,** This will give you a menu of the various **Setup** items.

The first step is to set the **Security** and **Security Profiles** for the program, typically with one supervisor having access to everything and then customizing a profile for the various users under the supervisor. Next, select **Configuration Options,** which will govern how your program functions. After that, select on the **Form Options** Tab the forms to be printed. Depending on your form selections, you may then have to select **Printing Options** for the forms.

If you want penalty calculation, select **Setup, Penalty Schedule** and set the penalty schedule. If fee calculation is enabled you must select **Setup, Business Codes** and add a business code record for each different business code to be used. Each license in the program must have a business code to calculate the fee. **Occupational Licenses Manager** comes with a complete set of standard NAIC codes. You may modify these for your own needs if necessary. Go through the options and customize your system.

After this has been done you are ready to begin entering businesses. Select **File, Business** and begin entering data for each business. You may print the information you have entered at any time by selecting the appropriate item from the **Print** menu.

Getting Organized

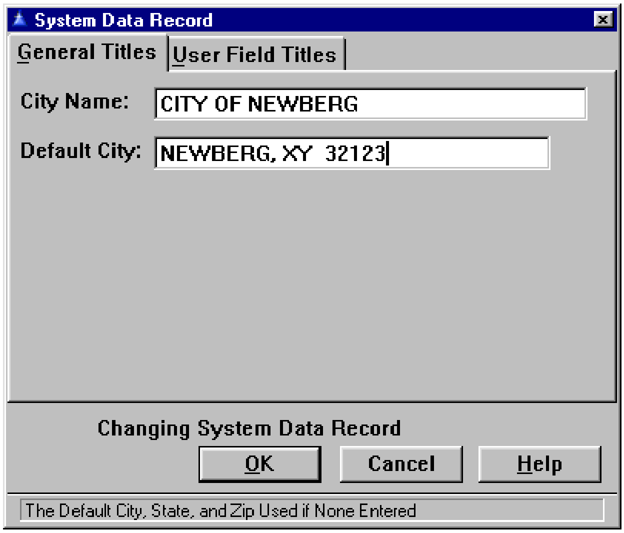
In order to make the **Occupational Licenses Manager** do all it can do, you first have to tell it how things work in your city. To do this, you'll need copies of your city's business ordinance and business codes. You'll also need the current licenses so you can properly set your printing options, and of course, so you can enter the data from each license.

Titles

Titles

Go to **Setup, Titles**. To have your city name print at the top of reports and to have it appear as the default in address fields, you need to enter it as part of your setup.

On the General Titles Tab fill out the **City Name** and the **Default City**.



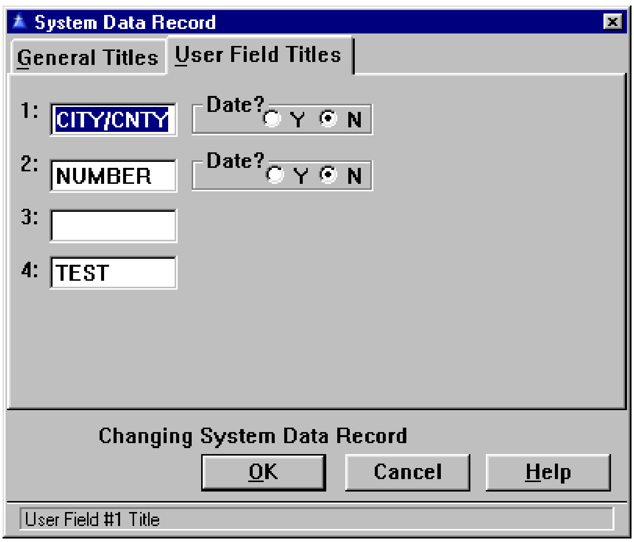
Enter your city name exactly as you want it to appear on reports, to a maximum of 40 characters. *Enter* means type in the requested information and press Tab. The insertion point moves to the next field. A *field* is a space for a particular piece of information.

Enter the city, state, and zip code which are most often used on licenses. These will appear as defaults throughout the program, thereby speeding up data entry. Click OK.

On the User Field Titles Tab you enter four fields which can be called anything you wish. The first three may contain up to 8 characters of data and may also be dates. The fourth field holds up to 30 characters of data. The fourth field holds up to 30 characters of data. Some cities like to keep track of information related to the application for an occupational license, in addition to the standard license data. They may use the fields to keep track of things like building inspections, fire inspections, and alarm permits.

But what goes in these fields (if anything at all) is left entirely up to you. If these fields are left blank, they will not appear anywhere else within the program. You can locate licenses on any of these fields the same as the other fields. Licenses are indexed on all of the active user defined fields. You can print reports for a range of any active user field from the Business list, Business Details, Form Letters, and Labels selections. All four fields will hold up to 30 characters.

Click on the User Field Titles Tab.



The cursor will be positioned in field #1. Enter a name for this field, to a maximum of 10 characters. Enter names for up to three more fields. When done, click OK.

Security

Security Profiles

Go to **File, System Setup and Utilities, Security, Security Profiles.** The **Occupational Licenses Manager** has features built-in to provide security for your occupational license records. This security is in the form of six levels of password protection. All security profiles should be reviewed after each release is installed because of system setup changes.

This system features individual procedure level access for an unlimited number of users. Each user may be assigned to any one of an unlimited number of security profiles. Security on entire menus may be set as well.

Setting a menu automatically sets the access to all subordinate items and menus to the same access level. You can also set items under a menu to a higher or lower access level than their parent menu. The only exception is if you set access to a menu to *No Access.* This disables all items on that menu that are sensitive, including any sub-menus if any, regardless of their individual access levels. If you do not set up your security profiles, it will default to *No Access.*

Note: After installation the program will grant complete access without asking for a user name or password, until at least one user is added. This should be done first thing.. You should disable access to the Security functions in File, System Setup and

The *No Access* allows no access at all to the user. The *View Only* level allows persons access to license information, but does not allow it to be changed. It also prevents confidential information from being viewed by the user when *Data Entry* permits access to data only. The *Update* level allows users to change individual licenses, but does not allow changes to be made affecting many licenses (for

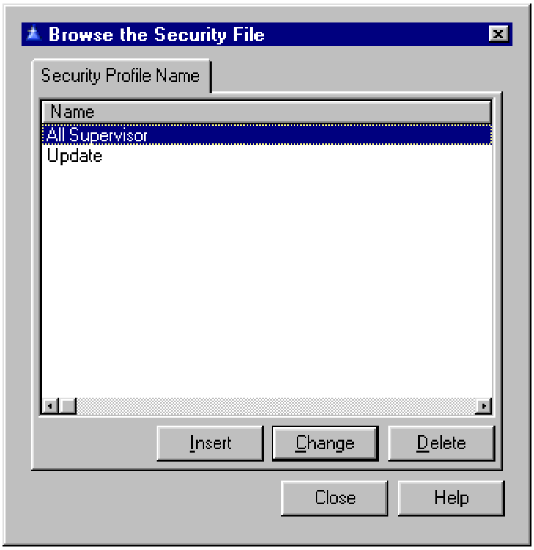
Utilities, Security, Security Profiles and Users for all security profiles but one, which should be set to the highest level (Supervisor).

example, computing fees or penalties). The *System Update* level permits access to all functions except security. The *Supervisor* level password is the highest security level, permitting access to everything.

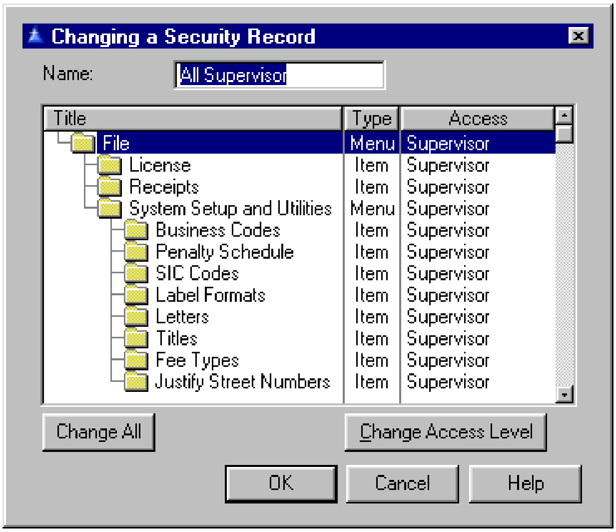
A security profile of *Supervisor* must be set up first, then you may add additional profiles with different access levels. Once you have set up your security profile, you can begin adding users for the program.

To enter new information press the Insert Button.

It's a good idea to make sure at least the person responsible for occupational licenses and the department manager know the Supervisor password, in case someone is out of the office.



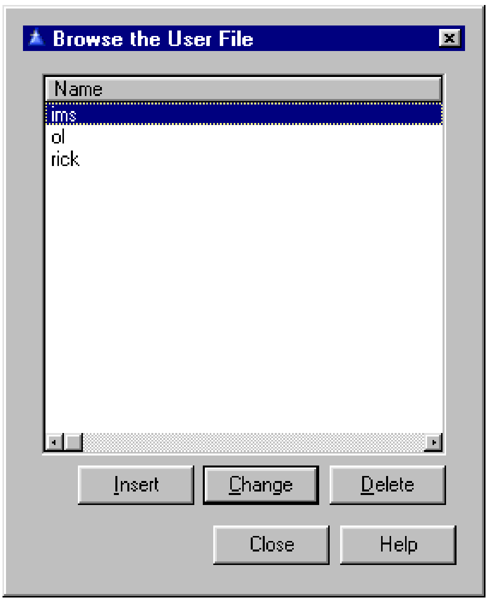
To change the user access information, press the Change Access Level Button or Change All to change all the access levels to the same thing.



Users

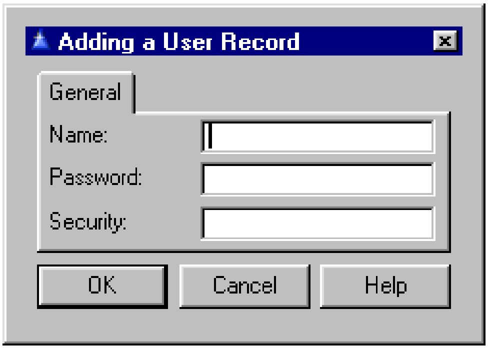
To enter access information for each user, go to **Setup, Security, Users.**

It doesn't matter Whether a password is entered uppercase, lowercase, or a combination of the two. The program considers them the same.

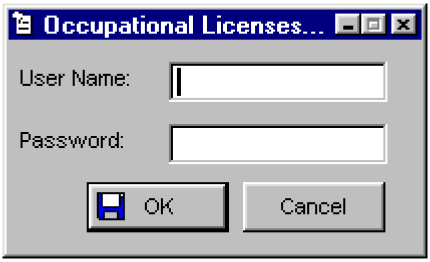


Select the Insert Button and the **Name** of the user, **Password**, and a **Security** profile for that user. In the **Security** field you can use the F3 "hotkey" to access the profiles and select which profile you want to assign a particular user. Click OK.

If you fail to provide Supervisor access to the security functions for at least one security profile you will be unable to make any additions or changes.

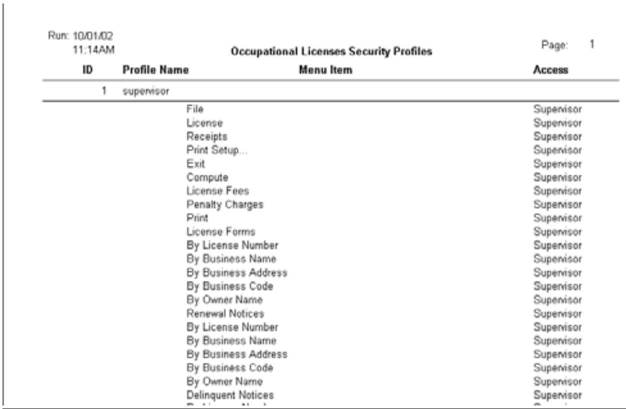


Once you have entered the information into the system a login box will appear the next time you enter the program.



Print Security Profile List

Go to **Setup, Security, Print Security Profile List**. This report lists all security profiles and the access for each menu item. It requires *Supervisor* access to print.



Run: 10/01/02
11:14AM

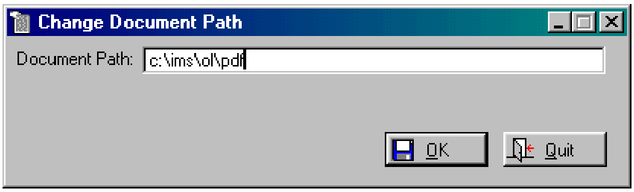
Occupational Licenses Security Profiles

Page: 1

ID	Profile Name	Menu Item	Access
1	supervisor		
		File	Supervisor
		License	Supervisor
		Receipts	Supervisor
		Print Setup...	Supervisor
		Exit	Supervisor
		Compute	Supervisor
		License Fees	Supervisor
		Penalty Charges	Supervisor
		Print	Supervisor
		License Forms	Supervisor
		By License Number	Supervisor
		By Business Name	Supervisor
		By Business Address	Supervisor
		By Business Code	Supervisor
		By Owner Name	Supervisor
		Renewal Notices	Supervisor
		By License Number	Supervisor
		By Business Name	Supervisor
		By Business Address	Supervisor
		By Business Code	Supervisor
		By Owner Name	Supervisor
		Delinquent Notices	Supervisor

PDF Setup

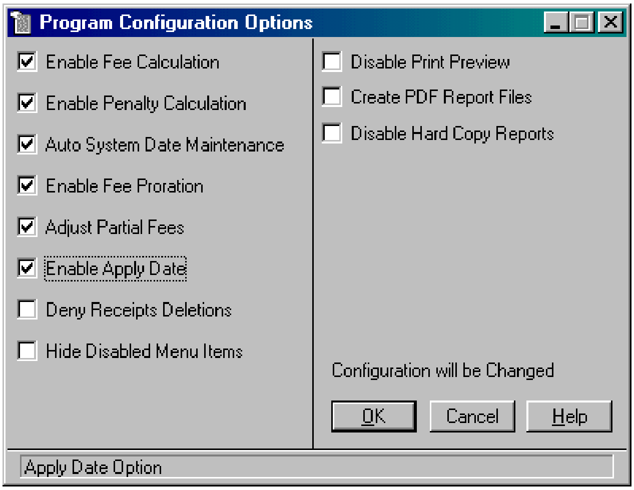
Go to **Setup, Document Path**. PDF reports are stored here. The PDF report will also need to be setup under **Setup, Configuration Options**, Create PDF Reports.



Configuration Options

This section is to customize your **Occupational Licenses Manager** to the way you work. There are nine options contained within the configuration options window, each of which can be enabled by putting a check mark in the box next to the option, or disabled by leaving the box blank. Go to **Setup, Configuration Options**.

*What screens and fields pop up throughout this program will depend upon what you have selected in the **Configuration Options** area. If your screen does not match the manual picture, go back and either enable or disable the area to which it pertains to see how it changes.*



Choose to enable or disable each of the options as explained below. When you're done, click on OK.

Enable Fee Calculation
When checked, fees will be calculated automatically from the fee schedules contained in the business code file. If blank there will be no automatic fee calculation, and each fee for each license would have to be entered manually.

Enable Penalty Calculation
When this is checked, the program will calculate penalties based on the penalty schedule. If blank, no penalties will be calculated, and **Penalty Charges** will appear grayed in the selection menu.

Auto System Date Maintenance
When this option is checked the system date of the program will be set to the computer date each time the **Occupational Licenses Manager** is started. (This date can be overridden through **Setup, System Date**.) If this is blank, the system date will remain unchanged until it is changed manually.

Enable Fee Proration

When checked, the license fee can be prorated, based on the value in the license term field. (e.g. If the license term field contains 6 [months], the fee will be half the value calculated for the year [12 months]). If fee proration is enabled, the default value for newly added business codes is now Prorate for partial Year and **Prorate Base Fee Only**. When adding or editing a license, the fees are recomputed when the license term is changed. This would have no effect if the business code is not coded to prorate or proration is disabled system-wide.

Adjust Partial Fees

When checked, the license fee for licenses with a license term of less than 12 months will be adjusted upward for a full year fee based on the fee in the business code, when fees are computed for the new year. This will be done when fee calculation is enabled. For example, if a license has a fee of $25.00 and a license term of 6 [months], the term will be set to 12 months and the fee for the new year will be set to $50.00 when fees are computed.

Use the **Enable Fee Calculation** with this option. You can set the license fee by checking the **Fix** box (**Setup, Fee Types**) if they are hand coded, and then this section would not apply.

Enable Apply Date

When checked, this allows payments to be accepted for license renewals in the old fiscal year that are not to be applied until the new fiscal year for which the license will be issued.

There will be two date boxes on each receipted license, one for the day of the actual receipt and one for the date the receipt is to be applied towards.

The date applied for payments made using **File, Business**, Edit Button is written to the cash receipts file. Receipts reports may be printed based on either date received or date applied if this is enabled. A default date may now be set for the apply date for payments. When configured for apply date, **Setup, System Date** will also allow setting the apply date. When payments are entered the date will be filled in automatically from the default.

Deny Receipts Deletions
When checked, this prevents cash receipts records from being deleted or changed. Receipts can then only be deleted or changed by a reversing receipt (adding another receipt for the same amount, but negative).

Alternate Data Entry Form
When checked, this form appears with the entry fields on one screen, rather than tabbed through several screens, see Adding new licenses to see the differences between the two screens.

Hide Disabled Menu Items
When checked, the items you have selected to be disabled will not be visible on the forms and will also not be available to the users with menu items of *No Access*, since they were disabled.

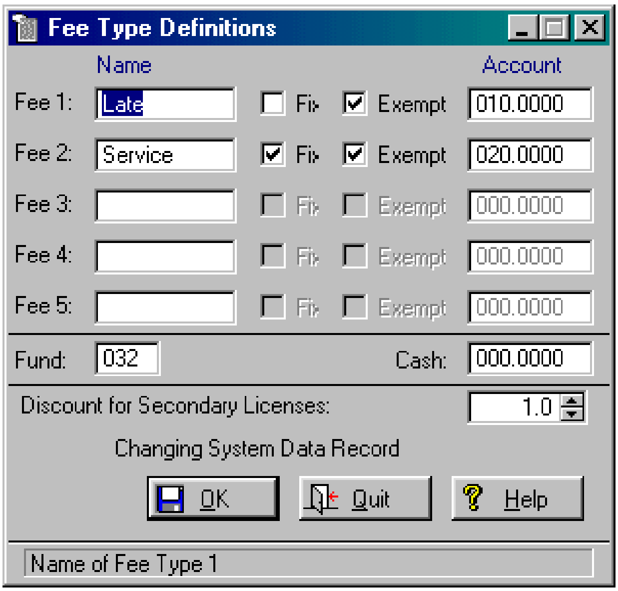
Create PDF Report Files and **Disable Hard Copy Reports**
If the PDF module is installed two new checkboxes will appear. This option will create PDF files from reports. This option is available only if the PDF module is installed. See PDF Reports for more information on this topic.

Fee Types

Go to **Setup, Fee Types**. The **Occupational Licenses Manager** provides five different categories for the fees you collect, and you define what they are. Whether license or penalty, transfer or vending fee, you simply enter its name and tell the program whether this fee is always a fixed amount, or **Exempt** from Penalty calculation. **Discount for Secondary Licenses** allows specifying the percent discount to apply when computing the license fee for licenses other than the primary one. Note that the discount applies only to the first fee category, usually the license fee. If the discount field is left at zero the **Primary** flag will have no effect on fees. See information on the **Primary** flag.

Enter the name of the first fee type, which must be *License*. If this is a fixed amount (generally, only used when the **Fee Calculation** is not enabled, or in the case of a set fee amount to be charged each year such as alarm fees) click in the space next to the **Fix** box.

The first fee type must always be license if you are using this as an occupational license format. The second fee type must always be penalty.

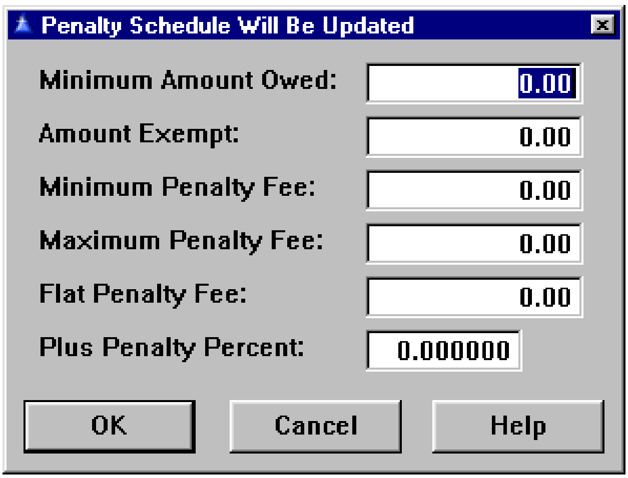


If this amount is to be exempt from a penalty calculation, click in the **Exempt** box. The **General Ledger** account number belongs in the **Account** box. Enter the names for up to four more fee types, the first of these must be *Penalty* if you compute penalties on overdue licenses. When done, click OK. When a name is assigned to a fee type that was previously unused (blank), the penalty exempt field is immediately active.

Penalty Schedule

Go to **Setup, Penalty Schedule.** If you assess penalties for licenses not paid by the date due, you need to set up a penalty schedule to tell the program how you want penalties calculated. In order for penalties to be calculated, the **Enable Penalty Calculation** option in **Setup, Configuration Options** must be set to Y.

Remember the penalty amounts printed on forms are for information only. The actual penalties computed are based entirely on what is in the penalty schedule at the time it is computed. The user is responsible for setting the penalty schedule to match the penalties shown on the license forms.



If a four step penalty system is used the penalty schedule must be set each time.

In the first field enter the **Minimum Amount** that must be owed (e.g. $.01, $.50, $1.00) before a penalty will be calculated. Default is 0. In the **Amount Exempt** field enter the portion (in dollars) of the amount owed that will be exempt from the penalty calculation. If no amount is exempt, leave the default of $0 as is.

If the license form you are using does not print the late payment amounts then you need not be concerned with the penalty amounts shown in the Printing Options window.

In the **Minimum Penalty Fee** field enter the minimum amount the penalty fee will be if a penalty is calculated. The default is $0 (no penalty).

In the **Maximum Penalty Fee** field enter the amount the penalty fee will not exceed, regardless of the penalty calculated. An amount must appear in this field, to a maximum of $999,999,999.99.

If the license (renewal or delinquent) form prints the amounts due if paid late, the information used to calculate the amount is taken from the printing options data in **Setup, Printing Options**, Penalties Tab, and the penalty exempt status of each fee type as set in **Setup, Fee Types**.

If penalty calculation is not enabled in ***File, System Setup and Utilities, Configuration Options, Enable Penalty Calculation, then*** *the penalty window will not appear.*

Nothing is used from the penalty schedule. If any fee type is exempt from penalty, then the amount due at each payment date increment will only calculate based on what fee types a penalty can calculate on. When penalties are calculated (**Compute, Penalty Charges**) the computations are based on the values in the penalty schedule (**Setup, Penalty Schedule**) and the penalty exempt status of each fee type as set in the fee types window (**Setup, Fee Types).**

You must change the penalty schedule to match the fees as you want them to print on the licenses. The default is set to no flat penalty fees and will charge a penalty only on the license fee.

Be aware that some of the special hard coded forms print a fixed 10, 15, 20, 25 percent penalty regardless of the percentages in the printing options window. All forms that print late amounts will use the printing options data. The minimum, maximum and exempt amounts in the penalty schedule are also applied. This means that it is possible for the calculated penalty amount to be different from the amount printed on the forms even if the flat penalty and percent amounts are the same. What was printed on the forms has no bearing on the computation, as these are two separate fields.

In the **Flat Penalty Fee** field penalties are computed as a flat fee plus a percentage within the minimum and maximum amounts. This means that penalties can be charged a flat amount plus the percentage for that month. Enter the amount to suit your ordinances before computing penalties. In the last field, **Plus Penalty Percent**, enter the percent of the amount of penalty to be owed this month, such as 10% for October, 15% for November, 20% for December and 25% for January. This is the percentage you are charging this month on delinquent licenses. It should be entered as 10.000 or 25.000, etc. Any fee type that has been marked **Exempt** or an amount in the **Amount Exempt** box will not be figured into the penalty percentage calculation.

For example, if the amount owed is $65.00, and the amount exempt from penalty was $5.00, then the qualifying amount would be $60.00. If the percent scheduled is 10% , then the penalty calculated would be $6.00. When done, click OK.

Business Codes

Some users choose business codes to correspond with the business ordinances; others find it easier for clerks entering licenses to use easier to remember letters (like "REST" for restaurant or "WAREHS" for warehouse.

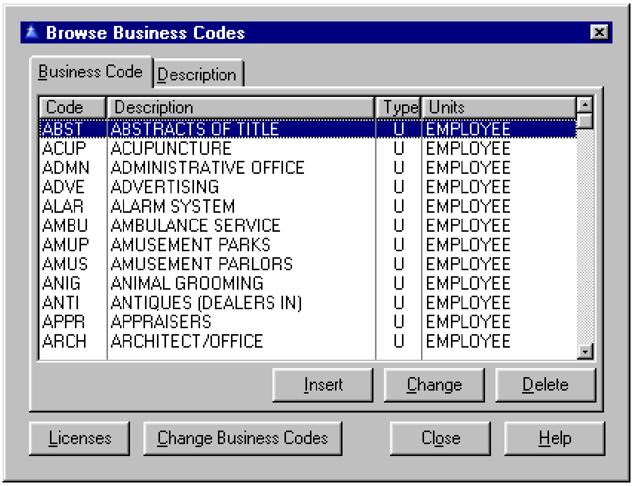
Business codes are used to identify a specific type of business and its corresponding fee structure. These are derived from the ordinances as specified within each city. Business codes are made up of up to eight characters - either letters, numbers, or a combination of both. Within the business code there is one of two fee types (a fee type is the same thing as a fee structure): flat and table-based. A flat fee means that all businesses with that code will be charged the same license fee.

A table-based fee can be calculated based on the inventory a business has or the units it has (e.g. rooms in a motel, stations in a salon). The next three topics describe how to enter business codes for flat fees, those based on inventory, and those based on units.

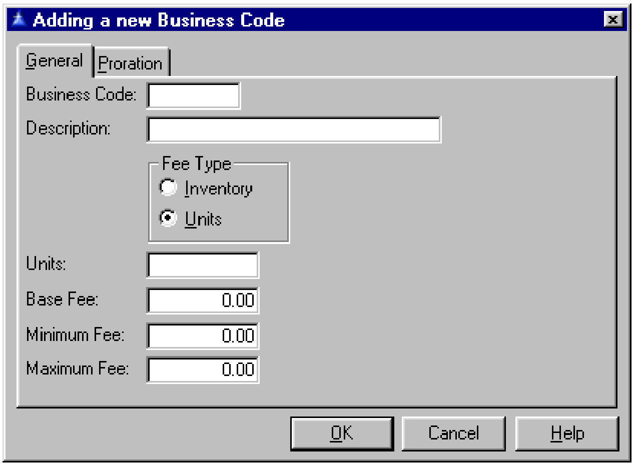
Entering flat fee business codes

Flat fees are those which are the same for every business with that business code. Go to **Setup, Business Codes**. Click on **Insert**. The Adding a New Business Code screen will appear.

Note: To change an existing business code to a new one, you would need to insert the new business code first, then select Change Business Code instead of Insert. Type in old business code and then new code that replaces it.



If you have enabled Fee Proration in the [Configuration Options](#) settings, you will see a Proration folder next to General. You have the choice of selecting to prorate for Partial Year.



Business codes always enter and appear in uppercase letters.

Type the name of the first business code to add, to a maximum of six characters.

The description entered here will also be used as the default Description 1 when adding a license.

Type a description of the type of business, to a maximum of 30 characters. Click on the button next to **Units**, or use the Tab Key to enter through the fields. For flat fees, the **Units** field should be empty. Click on the **Base Fee** field. Enter the amount of the fee. Click OK when you're done, and the business code will be added.

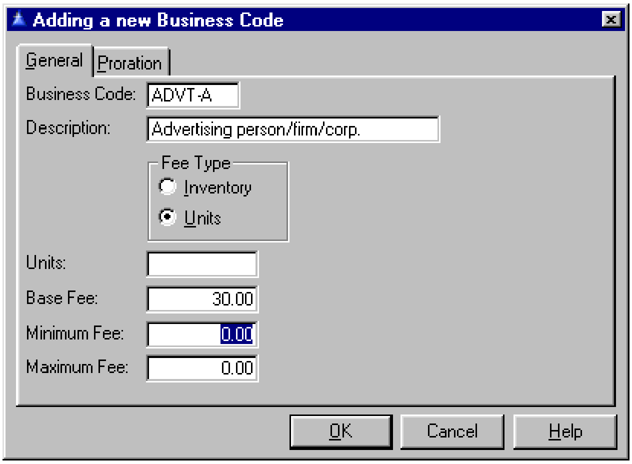
Flat Fee example

The business ordinance reads as follows:

```
ADVERTISING AGENTS OR AGENCY:
      (a.) Persons, firms or
corporations
      ...............30.00
```

This means that all advertising persons or agencies with this business code will pay a flat $30.00 for their occupational licenses. The code would be set up as follows:

The Fee Table and Proration folders only appear once you have entered information in the Units field..



Entering Business Codes Based on Units

Go to **Setup, Business Codes**. There are two pages of information to be entered for each business code based on units: General and Fee Table. Each of these appears as a separate tab on the screen. Click on Insert. The Adding a New Business Code screen will appear.

Business codes always enter and appear in uppercase letters

Type the name of the first business code to add, to a maximum of six characters.

The description entered here will also be used as the default ***Description 1*** *when adding a license.*

Type a description of the type of business, to a maximum of 30 characters.

Check the space next to **Units**. Then click on the **Units** field. Enter the name of the unit (e.g. *rooms, chairs, employees, seats*). When you move to the next field, the Fee Table Tab will appear.

Enter the information requested into each field. For more information on what each field should contain, consult the Glossary. When you are finished with the General screen, click on the Fee Table Tab to go to the next screen.

Click or tab to the **Minimum Fee** field – this is where a minimum fee amount would be entered. For example, if a fee is based on Units of Chairs, at a $5.00 per chair charge, with a minimum fee of $20.00 you would enter $20.00 into the **Minimum** field and set your table up to reflect the $5.00 per chair charge.

When entering numbers into the fee table, please note that the number 0 is currently counted as one whole number. So in using the range 0-10 you are actually counting 11 of the title of the units. This will show up when you calculate fees later.

Click or tab to the **Maximum Fee** field. Enter the maximum amount you can charge for that particular business code. Using our example above, at $5.00 per chair with a minimum of $20.00 for the business license, the ordinance may state that there is a maximum of $100.00 that can be charged. When that amount is entered into the **Maximum** field, the table will calculate based on the $5.00 per chair amount, but the highest amount that can be charged for the license will be $100.00, so the license amount will never exceed that. When you have filled in the General Tab go to the Fee Table Tab to finish setting up the Fee Table. Each level of the table contains a beginning and ending unit count and a fee amount in dollars plus a specified per unit fee. Most fee structures can be accomplished by taking advantage of the flexibility in the fee table.

If you prefer you may enter 0-11 to ensure that your range is really 0-10 for fee calculation purpose.

Enter the information requested for each level. When you reach the highest level of the fee table, press the End Key in the **To** field. This will set the units to 99,999,999,999, and erase all subsequent levels.

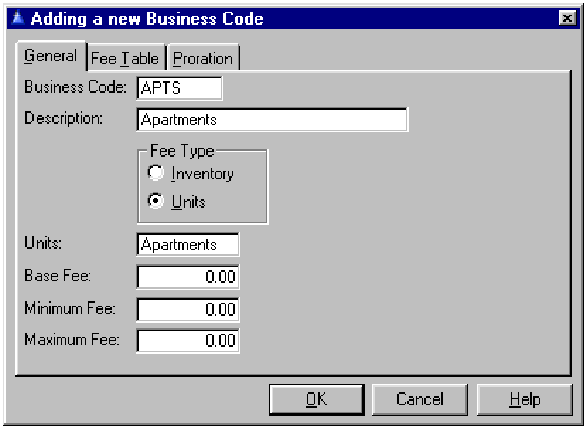
When complete, click OK. To enter more business codes, click on Insert.

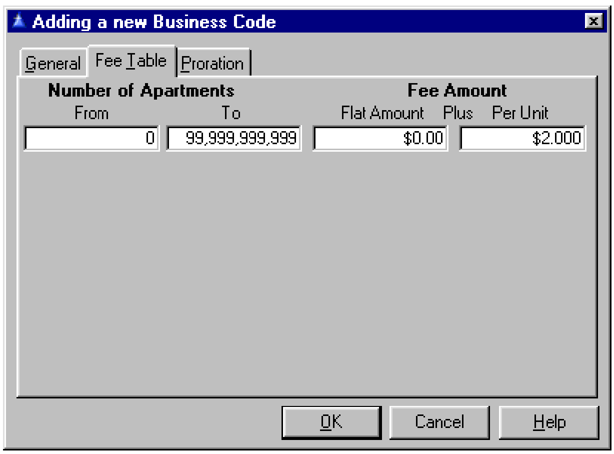
Unit-based example #1

The business ordinance reads as follows:

```
        35
APARTMENT HOUSES:
     Each apartment per year.. 2.00
```

This means that the license fee for all apartment buildings is $2.00 per apartment. The code would be set up as follows:



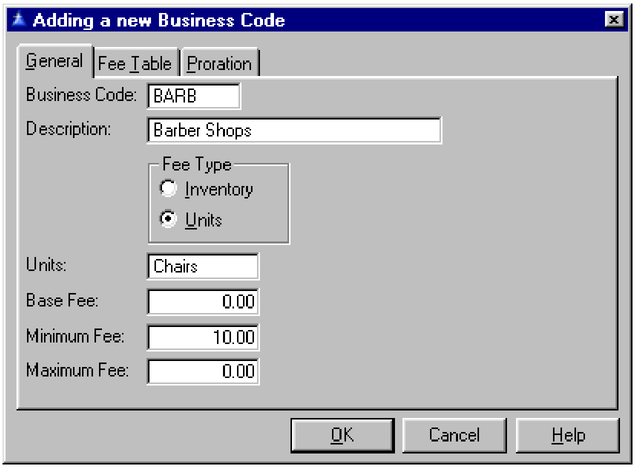


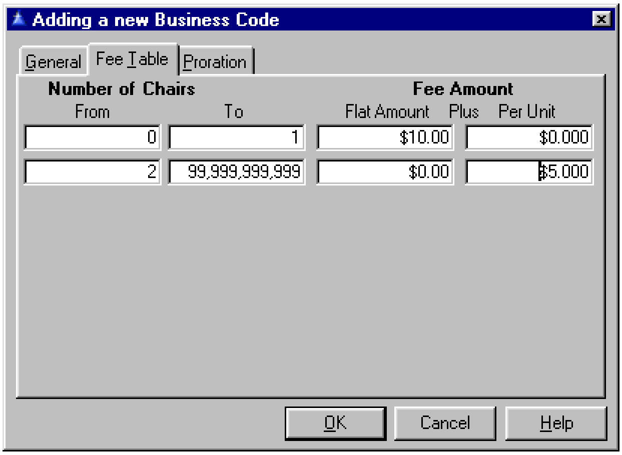
Unit-based example #2

The business ordinance reads as follows:

```
BARBER SHOPS:
      (a.) First chair…......10.00
      (b.) For each additional chair
           (in use or not).......5.00
```

The code would be set up as follows:



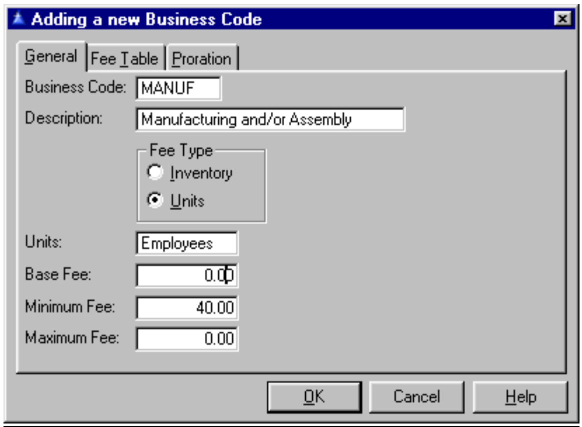


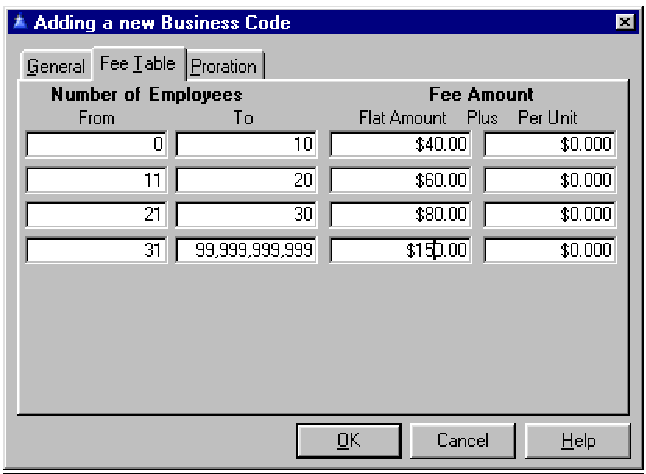
Unit-based example #3

The business ordinance reads as follows:

```
MANUFACTURING AND/OR ASSEMBLY
PLANTS:
      (a.) 1 - 10 employees... 40.00
      (b.) 11 - 20 employees.. 60.00
      (c.) 21 - 30 employees.. 80.00
      (d.) over 30 employees..150.00
```

The code would be set up as follows:



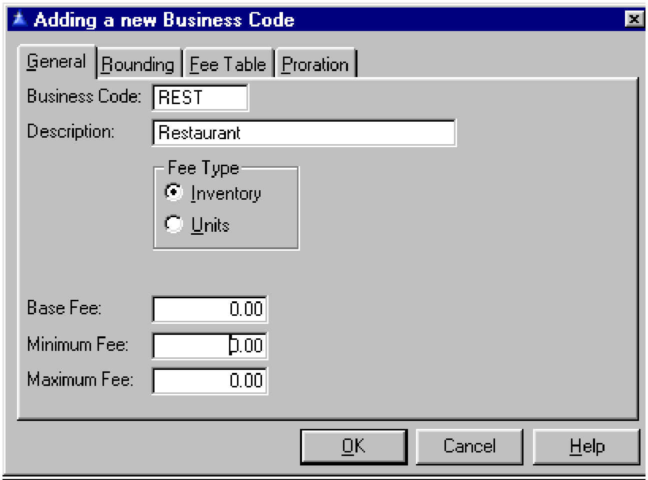


Entering business codes based on inventory

There are three sections of information to be entered for each business code based on inventory: General, Rounding, and Fee Table. Each of these appears as a separate tab on the screen. Go to **Setup, Business Codes**.

Click on **Insert**. The Adding a New Business Code screen will appear.

Your screen will not appear like this with 4 folders until you select the Inventory as your Fee Type.



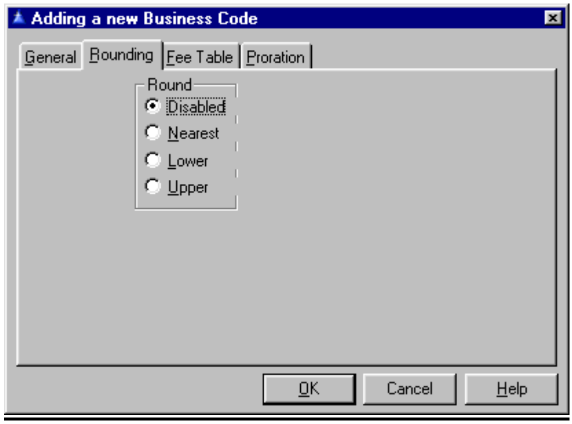
Business codes always enter and appear in uppercase letters.

Type the name of the first business code to add, to a maximum of six characters. Type a description of the type of business, to a maximum of 30 characters. Click in the space next to **Inventory**.

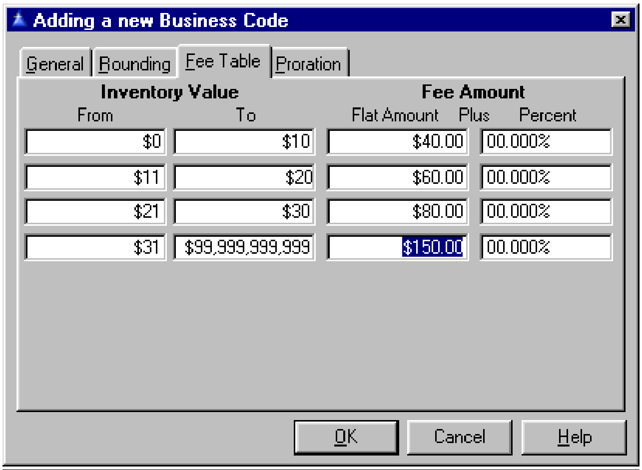
The description entered here will also be used as the default Description 1 when adding a license.

Enter the information requested into each field. When you are finished with the General Tab, click on the Rounding Tab to go to the following screen.

When you select Nearest, Lower, or Upper a little box with a Digits Title appears asking you to select a numerical limit of rounding. See *Rounding* .



After you have made a rounding choice, click on the Fee Table Tab to go to the next screen.



For more information on entering fee tables, refer to the topic *Fee table hints*.

Each level of the table contains a beginning and ending inventory value and a fee amount in dollars plus a specified percentage of the rounded inventory value. Most fee structures can be accomplished by taking advantage of the flexibility in the fee table. Enter the information requested for each level. When you reach the highest level of the fee table, press the End Key in the **To** field.

This will set the value to $99,999,999,999, and erase all subsequent levels. When complete, click OK. To enter more business codes, click on Insert.

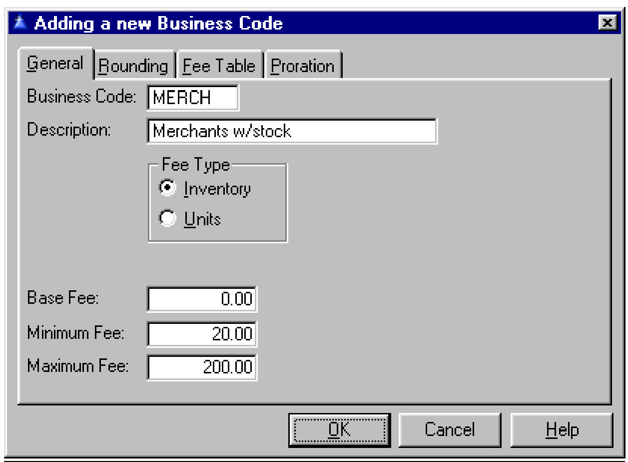
The Misc.Tab in the license record is where the inventory value of the business is entered.

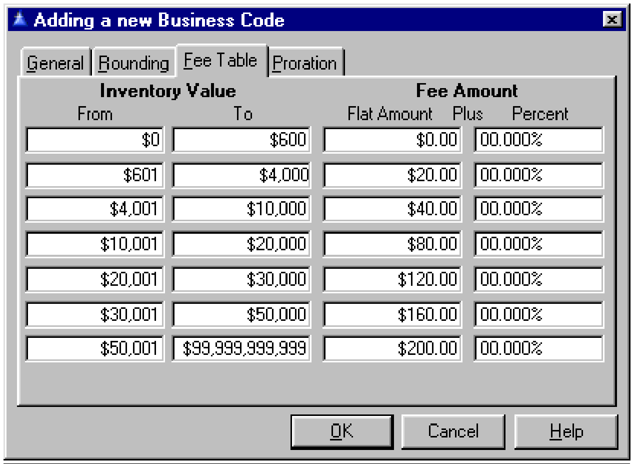
Inventory-based example

The business ordinance reads as follows:

```
MERCHANTS: (Other than those
specifically mentioned; having a
stock of merchandise the value of
which is)
(a.) $600.00 or more,
 but less than $4,000.00..... 20.00
(b.) $4,001.00
but less than $10,000.00.....40.00
(c.) $10,001.00
but less than $20,000.00.....80.00
(d.) $20,001.00
but less than $30,000.00....120.00
(e.) $30,001.00
but less than $50,000.00....150.00
(f.) More than $50,000.00....180.00
```

The code would be set up as follows:





Blank Business Codes

Go to **Utility, Blank Business Codes**. This utility lists any licenses with a missing business code. The business code is important because fees cannot be calculated if the business code is blank.

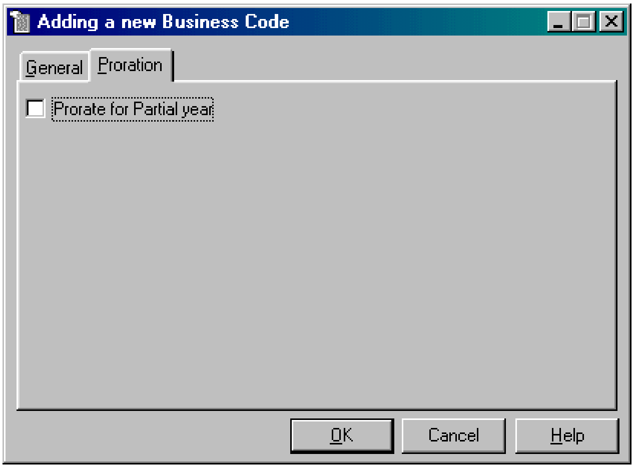
Rounding

For fees based on inventory, rounding may be applied to the inventory value before entering the fee table. There are five options for rounding. When rounding is *disabled*, no inventory rounding will take place. Fees will be calculated from the actual value of the inventory.

The Digits field does not appear if rounding is disabled.

The *nearest* rounding choice causes inventory to be rounded up or down, according to which is nearest the actual value. Amounts that are zero in all rounded digits are not rounded up. The *lower* option rounds the inventory down to the next level. The *upper* option rounds the inventory up to the next level.

The Proration Tab just contains a checkbox asking you if you want to prorate for a partial year.



Fee Table Hints

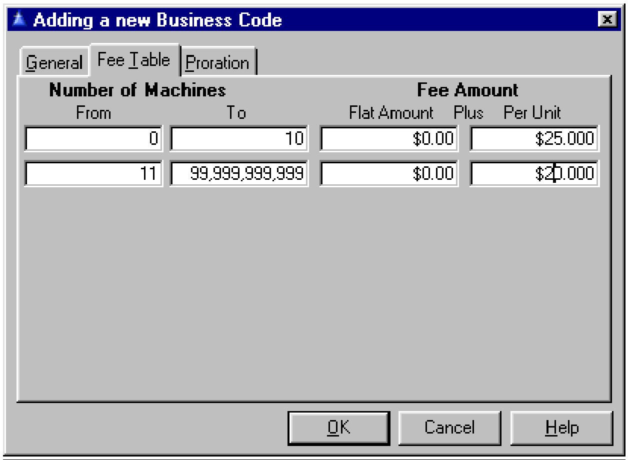
Most fee structures can be accomplished by taking advantage of the flexibility in the fee table. Some examples follow. These examples use the units table, but they can just as easily apply to the inventory value table.

Declining Rate Table

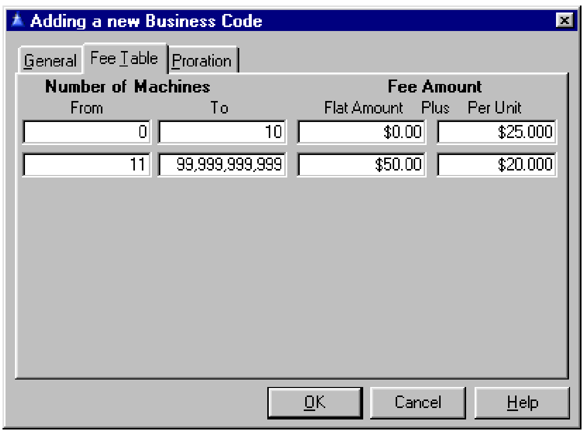
Multiply first, then add.

The rate for a business code is $25 per unit up to 10 units, and $20 per unit thereafter. The rate can be interpreted as $25 for each unit up to the break point of 10 units, plus $20 per unit for all above the break point. If a business has 15 units the fee would be ($25 x 10) + ($20 x 5) = $350.

This means the fee charged per unit changes at each break point, but only for those units within that rate level.



To set up such a rate, enter the same values in the table with the exception of the flat amount for the second level. The flat fee amount for the second table level (11 to 99,999,999,999 units) should be equal to the difference in unit cost between it and the prior level times the number of units at the break point. In this example that would be ($25-$20) x 10 = $50. The table would look like this:

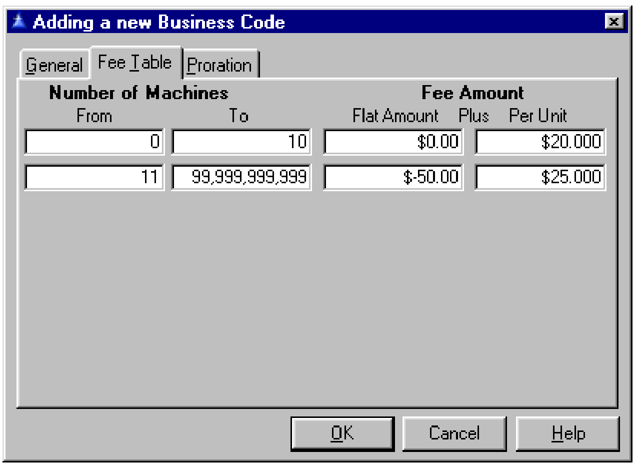


Now let's calculate the fee for 15 units. The fee would be \$50 + (\$20 x 15) = \$350. This technique can be applied at each level of the table.

Advancing Rate Table

If the fee per unit increases at a break point and you want to charge the fee per unit at each level of the table (the second of the two methods discussed above), the same method works. The only difference is that the flat fee amount at the second table level will be negative. Using our original example, let's reverse the rates: The fee is \$20 per unit for the first 10 units, and \$25 per unit above 10. For a business with 15 units that makes the fee (\$20 x 10) + (\$25 x 5) = \$325.

Using the same formula as above, the flat fee amount will be the difference between the unit fee at the two levels times the number of units at the break point. This works out to be (\$20 - \$25) x 10 = -\$50. Using the table set up this way results in a fee for a business with 15 units to be (\$25 x 15) + -\$50 = \$325. This is how the table would appear:



Printing Options

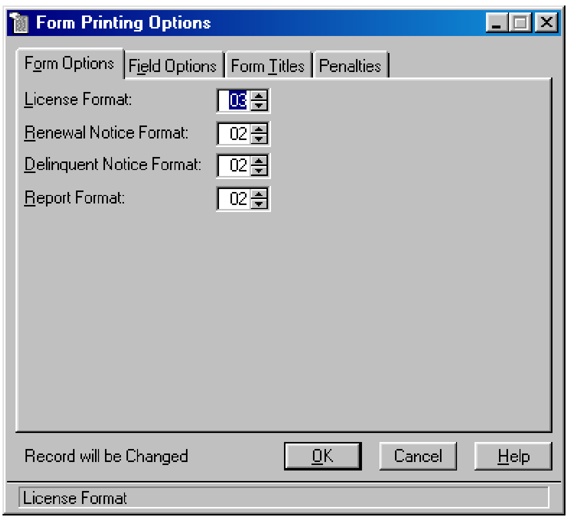
The **Occupational Licenses Manager** contains several variations of each form and report. This discussion and the two following will focus on the printing options contained in the **Setup**. After you add new licenses you will have a better idea how you'd like your license forms, renewal notices, and delinquent notices to look.

A definition of each field on these screens can be found in the Glossary.

The printing options item has tabs for four screens, Form Options, Field Options, Form Titles, and Penalties (when the enable **Penalty Calculation** box is checked in **Configuration Options**). The Form Options screen addresses the format of licenses, renewal notices, delinquent notices, and reports. Go to **Setup, Printing Options, Form Options.**

Form Options Formats:

There are several form layouts each for licenses, renewal notices and delinquent notices. Previously the format number selected here was the number of the form layout. Beginning with version 4.352 it is the ID number of the form as set up in **Setup,** Form Titles.



Form option 1 is the standard form for impact printers. This is for DOS users of this program. This form requires a pre-printed form containing the field titles, city name, and other text. It may also be a multi-part form. Renewal notices and delinquent forms are part of the DOS multi-part form, and those options are not used in the printing process as the forms print when licenses are printed.

If the form number is set to an invalid number, form number 1 will be printed.

Form option 2 is the standard laser/inkjet form. It is intended for printing on blank paper using a laser or inkjet printer. All field titles, city name, etc., are printed. The only requirement for the paper is that it be 8 ½ x 11" with perforations at 1/3 intervals (3.5 inches). The optional fields that print above the business mailing address on the license form will not show in a standard window envelope. It prints 3 copies of each license on each page. These copies can then be distributed to the customer and one for your files. The bottom 1/3 of the page is left blank. The total fee amount on license form 2 will print in bold on all forms of the page.

Renewal and delinquent notices are printed at 1/3 intervals (3.5 inches), 3 different licenses per page. These are all formatted to fit into a standard window envelope.

Form option 3 is a laser/inkjet form. It is intended for printing on blank paper using a laser or inkjet printer. All field titles, city name, etc., are printed. The only requirement for the paper is that it be 8 ½ x 11" with perforations at 1/3 intervals (3 ½ inches) It prints 3 copies of each license on each page. Renewal and delinquent notices are always printed as 1 notice per license, 3 license per page.

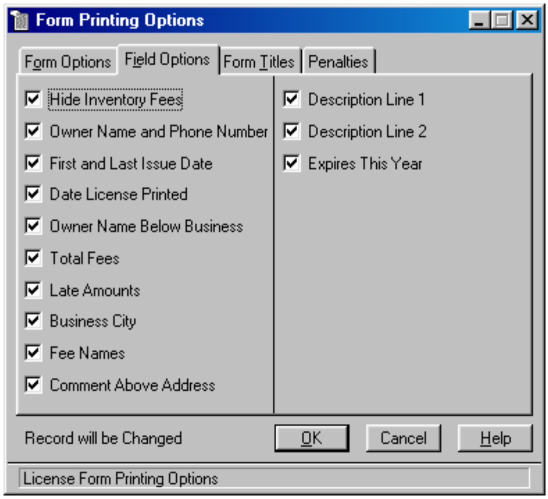
The optional fields that print above the business mailing address on the license form will not show in a standard window envelope. The signature line will print on this form for licenses if a signature is specified by the form. The total fee amount on license form 3 will print in bold on all forms of the page.

Form option 4 is a laser/inkjet form. It requires that the paper be 8 ½ x 11". It is intended for printing on blank paper using a laser or inkjet printer. All field titles, city name, etc., are printed. The only requirement for the paper is that it be 8 ½ x 11" with perforations at 1/3 intervals (3 ½ inches). It prints 3 different licenses per page. This would be used for users that mail out a license and do not keep a copy of the license on file. The optional fields that print above the business mailing address on the license form will not show in a standard window envelope.

Form option 5 and up are for custom forms designed by the individual users. Custom forms for individual users can be obtained from IMS at their regular programming charge and incorporated into the program.

The **Report Format** field selects the format for reports (not licenses). *Option 1* is the standard report format which prints in landscape mode on 8 ½ x 11" paper. *Option 2* prints reports on 8 ½ x 11" paper in portrait mode.

Option 3 prints reports on 8 ½ x 14" paper (the old standard green bar paper) on a dot matrix printer. Click on the Field Options Tab. The Field Options screen allows you to choose which of 12 specific fields (and optionally 13) will be printed on the licenses.



For each of the fields shown on the screen, add a check to the box to print the field on the license form. When you are done, click OK. Most of the field options are self-explanatory. If the **Hide Inventory Fees** field is checked the fee amounts will not be printed on renewal notices if the license is coded for fees based on inventory values. The purpose of this option is to allow sending out renewal notices before the inventory value for the year has been determined.

If the field **Late Amounts** is checked, then the fees specified on the Penalties Tab (usually a 5% increase per month) will be added for each increment specified. Penalties are normally calculated October, November, December and January, and should be entered on the Penalties Tab section, then those dates will be printed on the license.

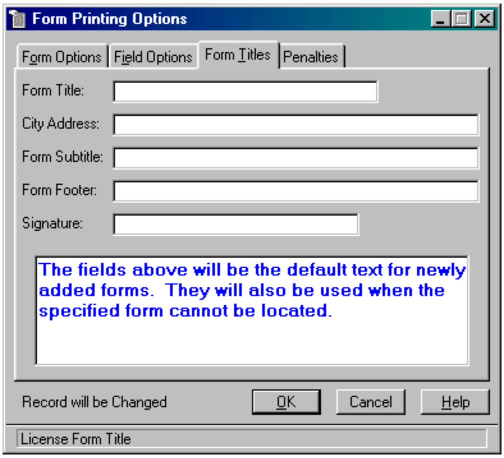
If you are using *Form 1 (dot matrix)* and the field **First and Last Issue Date** is checked, then another field, **Expires This Year**, appears. This option controls what years are printed for the beginning and ending license validity range. The laser format

(*Forms 2, 3 or 4*) obtains this information from the field **Form Subtotal** in the Form Titles Tab.

If checked, the range the license is valid will be from the prior year to the current year, as determined by the system date. (This is the date you set in the **Setup, System Date** window, not necessarily the computer system date). If not checked, the license is valid from the current year to the next year. For example: Assume the current year is 1997. If this option is checked, the year the license is valid will print as 1996-1997. If not it will print as 1997-1998.

Form Printing Options item has tabs for four screens, form options, field options, form titles and penalties. The Form Titles screen controls fields that print on the laser license, delinquent notice, and renewal forms (*Forms 2,3,4*). It has no effect on the other form options. Click on the Form Titles Tab. The format number is the ID number of the form as set up in **Setup,** Form Titles.

See also *Form Titles*



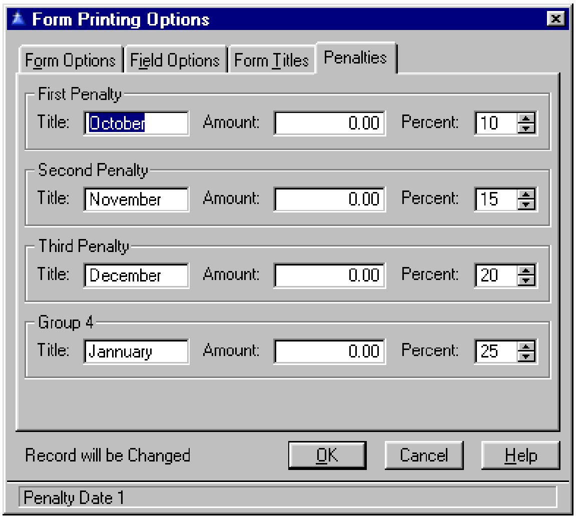
Enter the name you want to have printed in large bold type just below the city name on your form in the **Form Title** field. The **Form Title** field is generally *OCCUPATIONAL LICENSE*, but this field can be changed at the time Renewal Notices are printed to say *RENEWAL NOTICE*, and the same for printing a delinquent notice to say *DELINQUENT NOTICE*.

Enter the address that the licensee is to mail back their license payment. Enter information to be included beneath the form title (if any), such as the term of the license (license year) into the **Form Subtitle** field. The **Form Footer** field prints centered horizontally at the bottom of the license form. It can be used for any purpose (or not at all), and typically is used for a message indicating that the license is required to be displayed prominently. Click on the **Signature** field.

This title prints immediately below the signature line, and is usually the title of the person or department issuing the license. If this field is left blank the signature line will not be printed.

A **Signature** image can be optionally printed on license forms 2, 3, and 4. To implement this feature, create a bitmap image of the signature, place it in the **Occupational Licenses Manager** program folder on your computer, and name it SIGN.BMP. The image should have an aspect ratio of 4:1 (width is 4 times the height). The signature will print only if the signature line prints. Whether or not the signature line prints is in turn controlled by whether or not the signature line text has been defined. (This is the text that prints under the signature line, usually the signer's title or a generic title like "License Official").

Next, go to **Setup, Printing Options**, Penalties Tab.



The total amounts due are calculated from the percent penalty indicated by the user, and printed on the form. When **Enable Penalty Calculation** is checked in **Configuration Options**, the following additional Penalties field will be available to input data. This is where you set the percentages on penalties that print in the **Late Amounts** area when selected from the Field Options.

The screen above displays penalty percent amounts as they would be set up at the beginning of the license year. The **Percent** should be adjusted each month after Penalties are computed with the Penalty

Schedule to print the correct total amount due for that period on the Delinquent Notices, if the **Late Amounts** box has been checked on the Field Options section.

The **Percent** in this section will calculate based on the total amount due for each license, so a license of $100 with a 10% penalty calculated for the first late month would now have a total amount due of $110. When printing the delinquent notice, you would adjust each of the percents to reflect the 10% already calculated, so October should be set to 0% , November would be 5%, December would be 10% and January would be 15%.

Each month that the Penalty is calculated using the Penalty Schedule, if Delinquent Notices are to be printed with the Late Amounts showing, this section will need to be adjusted to reflect the correct Total Amount Due each month.

Form Titles

Go to **Setup, Form Titles**. The titles, watermarks and signature images on forms may now be set individually for each form type. This allows easy switching between different license types. This procedure allows the creation of the text printed in the titles of licenses, renewal notices, and delinquent notices. This option is available only on certain laser forms. Excluded are impact forms and private custom forms. When creating a form type the default text is as displayed **Setup, Printing Options,** Form Titles Tab.

This system is optional. After version 4.352 is installed all forms will print as before if no forms are created. If you do not create any forms it will continue to function as before. Once a form is created you must set the form numbers in **Setup, Printing Options** to indicate the form desired. If you specify a form number that does not exist the titles on the form will default to those in**, Printing Options, Form Titles**.

The same is true for images. If you do not create a form the images will print as before. If a valid form is specified the information in the form will be used instead of the defaults. If the image file name is left blank no image will print.

See Form Options

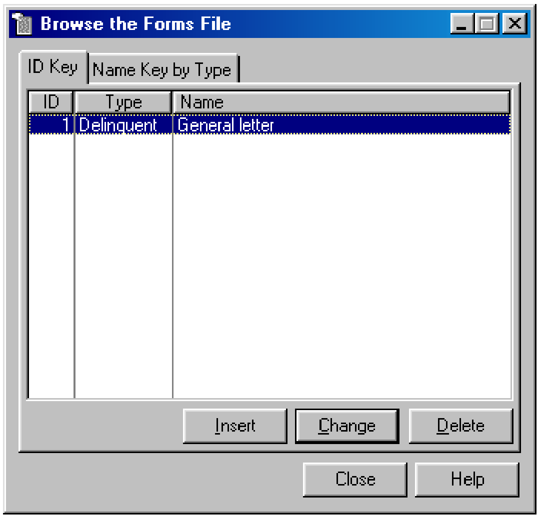
In the form titles window is a field labeled **Form Option** which specifies which of the form layouts are used by the form type. When forms are printed the settings in **Setup, Printing Options, Form Options** will determine which form type is used, and the form type will in turn specify the form layout. (If the number selected is a valid form type its name will appear to the right of the spin box.)

When editing a form type in **Setup, Form Titles**, the **Form Type** field specifies the general form category (license, renewal or delinquent). This field, in conjunction with the form option field specify the form layout which will be used.

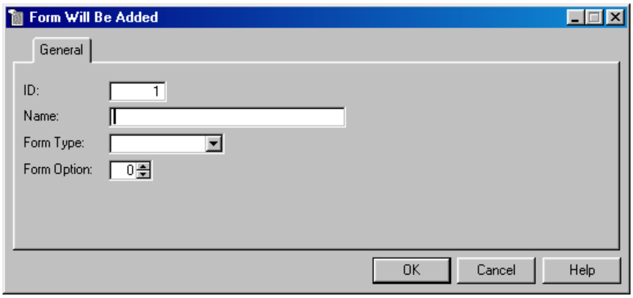
The name of the specified layout will be displayed, and the tabs for titles that are available on that layout will be displayed. If a tab is not shown it means the title may not be changed. This window also serves to indicate if an invalid form layout is selected. However it is possible to select a form layout that is available in more than one form category, such as license and renewal.

If a renewal form is specified in **Setup, Printing Options** as the license form, for example, the form printed will be the license form, not the renewal form. The titles printed on the form will be those from the specified form even though it is identified as a renewal form. It is up to the user to make sure the form types agree with the form layout specified in each.

When editing form titles in **Setup, Form Titles** the title fields may allow multiple lines and very long text. But the limiting factor is the form layout. To be safe you should limit the size of any text to that which is allowed in **Setup, Printing Options,** Form Titles Tab.

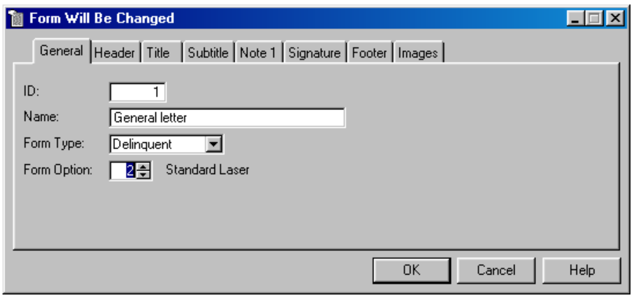


To create a new form title press the Insert Button. To edit and existing press the Change Button or the Delete Button to delete it.



The **ID** is automatically entered for you. Enter the **Name** of the new form title, select the **Form Type** from the drop down list and select which **Form Option.**

If you select anything higher than *Form Option 1* you will be able to continue on with more Tabs to fill out. These are essentially blank boxes for you to enter information into.



The Images Tab allows you to access a graphic for your printouts which you must have on your computer somewhere. It will place it on your printout as a watermark(very light graphic). **File Name** is the location of that graphic image. The **Horizontal** and **Vertical Positions** of each image must be specified in inches measured from the left and top of the form.

The image **Width** and **Height** must also be specified in inches. The image will be sized to fit the width and height specified regardless of its native size. To avoid distortion such as squeezing, stretching or squashing you should set the display width and height so as to produce the same aspect ratio (width divided by height) as the native image. For reference, see the default values for the images as of this release.

The titles, watermarks and signature images on forms may now be set individually for each form type. This allows easy switching between different license types.

Instead of using **Setup, Printing Options, Form Titles** and changing the title text, the titles may be changed by going to **Setup and Utilities, Printing Options, Form Options** and selecting a different form number.

Setup, Form Titles allows creating and specifying the text printed in the titles of licenses, renewal notices, and delinquent notices. This option is available only on certain laser forms. Excluded are impact forms and private custom forms. When creating a form type the default text is as displayed in **Setup, Printing Options**, Form Titles Tab. The translation between the names in Printing Options and Form Titles is as follows:

See Printing Options

Printing Options	Form Titles
City Name	Header
City Address	Note 1
Form Title	Title
Form Subtitle	Subtitle
Form Footer	Footer
Signature	Signature

The window located at **Setup, Printing Options**, Form Options Tab appears identical to that in previous releases, but there are subtle yet important differences. There are several form layouts each for licenses, renewal notices and delinquent notices. The format number selected here is the ID number of the form as set up in **Setup, Form Titles**.

When forms are printed the settings in **Setup, Printing Options, Form Options** will determine which form type is used, and the form type will in turn specify the form layout. (If the number selected is a valid form type its name will appear to the right of the spin box.) When editing a form type in **Setup, Form Titles**, the **Form Type** field specifies the general form category (license, renewal or delinquent).

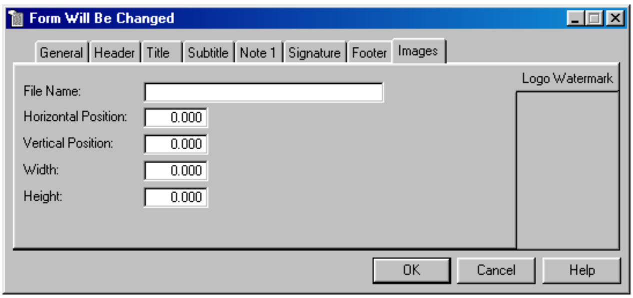
This field, in conjunction with the form option field specify the form layout which will be used. The name of the specified layout will be displayed, and the tabs for titles that are available on that layout will be displayed. If a tab is not shown it means the title may not be changed. This window also serves to indicate if an invalid form layout is selected.

However it is possible to select a form layout that is available in more than one form category, such as license and renewal. If a renewal form is specified in **Setup, Printing Options** as the license form, for example, the form printed will be the license form, not the renewal form. The titles printed on the form will be those from the specified form even though it is identified as a renewal form. It is up to the user to make sure the form types agree with the form layout specified in each.

When editing form titles **Setup, Form Titles** the title fields may allow multiple lines and very long text. But the limiting factor is the form layout.

To be safe you should limit the size of any text to that which is allowed **Setup, Printing Options**, Form Titles Tab.

This system is optional. When this release is installed all forms will print as before if no forms are created. If you do not create any forms it will continue to function as before. Once a form is created you must set the form numbers in **Setup, Printing Options** to indicate the form desired. If you specify a form number that does not exist the titles on the form will default to those in **Setup, Printing Options, Form Titles**. The same is true for images. If you do not create a form the images will print as before. If a valid form is specified the information in the form will be used instead of the defaults. If the image file name is left blank no image will print. Press OK when done.

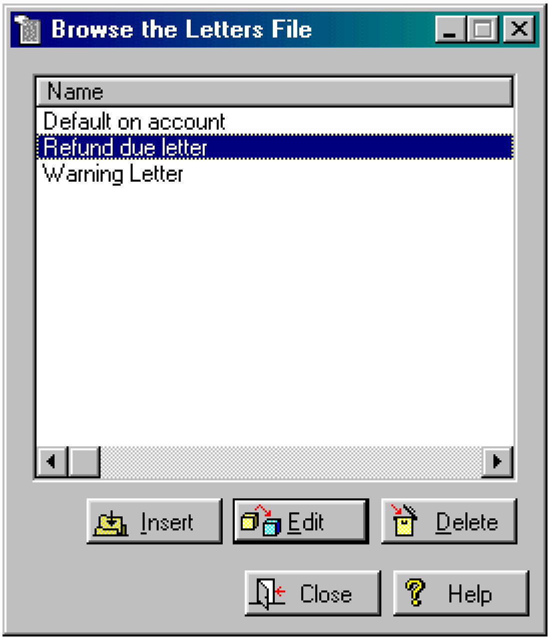


Letters & Labels

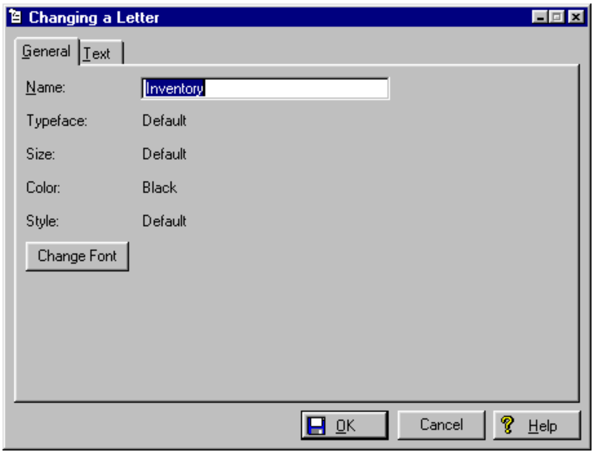
<u>Letters</u>

Pull down **Setup, Letters.** The number of different letters available is essentially unlimited. You may add new letters or edit old ones.

All of the contents of a letter are defined by you, the user and enhanced by a system of variables which allow each letter to be personalized by a symbol, consisting of a dollar sign followed by a two character code. To access this list use the hot key F3. Make sure that your cursor is in the letter box to access the hot key.



Start creating your own custom letter. Select Insert and start adding information based on the symbols list. For changes, simply select the Change Button and rename the letter after the new changes have been added.

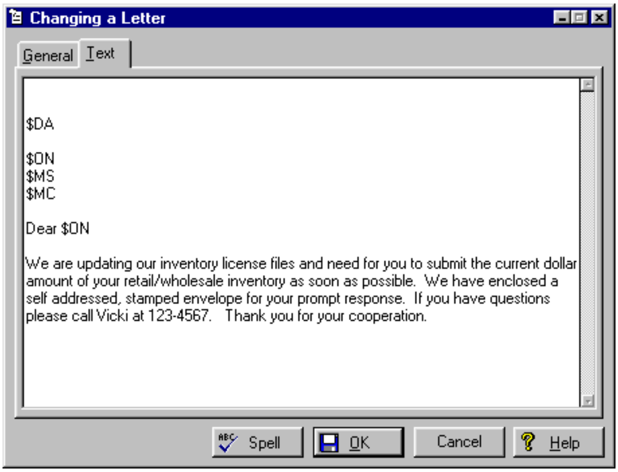


The font name, size, color, and style may be set by pressing the Font Button on the General Tab.

On the General Tab a literal dollar sign can be placed in the text by using a double dollar sign ($$). Note: The owner name is often an individual, and cities may enter the field in the last name, first name format so the names will collate in last name order.

If you select owner name, and the field contains a comma, the names will be turned around so the first name prints first. If there are no commas it will print as it is stored in the file. For example, "Smith, John" will become "John Smith" if you select $ON. However, "John Smith Chevrolet" will print as is. Beware of owner names such as "The Better Way, Inc." which will print as "Inc. The Better Way".

Spell checking is now available for the notes field in the license record and the letter text of form letters for users that have Microsoft Word installed on their computer. If the Spell Button appears on the window it means Word is present. If the button does not appear, either Word is not present or is an incompatible version.

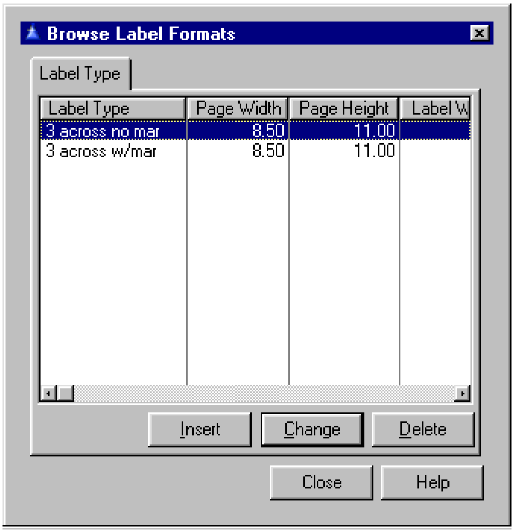


Note that when checking form letters each of the "dollar" variables will trigger a spelling error. One workaround other than pressing the Ignore button for each, is to configure Word to ignore upper case words. (In Word, use Tools, Options, Spelling and Grammar, Ignore words in UPPERCASE.) Of course, the dollar codes should be in upper case, and the letter should not, because any upper case words in the body of the letter will not be checked.

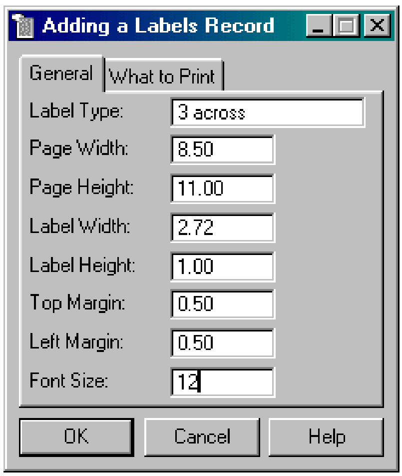
Labels

The **Occupational License Manager** makes it easy to print mailing labels of all sizes. All you need is the label you want to use and a ruler.

Go to **Setup**, **Label Formats**. The Browse Label Formats screen appears.



Press Insert. The Adding a Labels Record screen will appear.



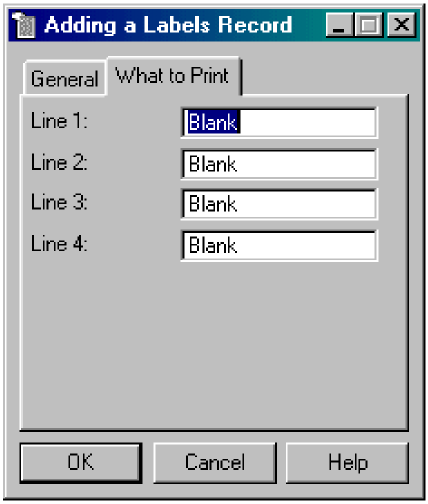
Give this label format a name, up to 15 characters, and put it in the **Label Type** field. *Example:* 3 *across laser.*

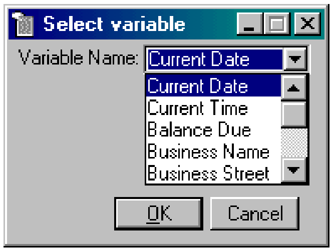
Measure the width and height of your page of labels, and enter these measurements (in inches) in the **Page Width and Page Height** fields, respectively. These measurements are also available on most laser label packages, with the standard width being 8.5 and the standard height as 11.

Measure the width and height of an individual label on the page. Enter these measurements into the **Label Width and Label Height** fields. *Example*: **Label Width** is 2.72 and **Label Height** is 1 (for one inch). Measure how far from the top margin of the page your first label is. Enter that into the **Top Margin** field. We recommend starting with .50 and adjusting up or down as you need. Measure how far from the left margin of the page your labels are. Enter that into the **Left Margin** field.

Finally, choose the **Font Size** (in points) you want your labels printed in. Make sure you choose one that your printer can produce, and also one that isn't so big you can't fit what you want to print on one line. Usually a font size of 10 or 12 will be adequate for most labels. When you're done, click OK. To enter more label formats, click on Insert and repeat this process. When you've entered all you want to, click on Close.

On the What to Print Tab, what prints in each of the four label lines may be selected from the 29 variables available for form letters. Use the hot key (F3 or right click) to select the value to be printed. When this version is installed all existing label formats will be initialized to print the default values of previous versions (License number, Business name, Business address, Business city) but may be changed to whatever desired.


Adding a Labels Record
General
What to Print
Line 1:
Blank
Line 2:
Blank
Line 3:
Blank
Line 4:
Blank
OK
Cancel
Help


Select variable
Variable Name:
Current Date
Current Date
Current Time
Balance Due
Business Name
Business Street
OK
Cancel

Day-to-Day Use

The Business File

To make the best use of browsing the business file, you need to be able to see all of the browse data and to view it in an order that is meaningful to your particular task.

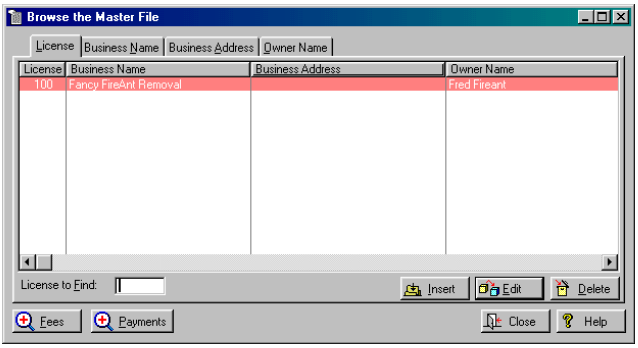
For each license, the Browse Master File display shows the license number, business code, business name, number and street name, suite number, owner name, and NAIC code. Because of the amount of information being displayed, you can't see everything at once. Each line in the display represents a business which may have anywhere from one to 100 licenses. If a business has more than a single license it will be displayed in red. When adding a business to the master file, the license file will be updated if the license number is changed from the system generated value. The two following topics will show you how to change the size of a field display and how to sort the license file in different orders. The applicant, owner name and address fields hold up to 40 characters. If you want to view the individual licenses in a lineup use **File, License**.

The **License** item browses the license file rather than the master business file. Thus if a business has more than one license it will appear once for each license. The license file is indexed by and thus may be located by license number, business code, NAIC code and license status. (Note that this is license status, not business status.) The NAIC location option is not shown if there are no NAIC codes in the system. In general you can perform the same functions from either browse, so the choice of which to use should be governed by how you intend to locate the record. However, there is a subtle difference between the two procedures when a business has multiple licenses: If using **File, Business**, the Payments Button will show payments for all licenses issued to the business. If using **File, License**, the Payments Button will show only payments for the selected license.

Seeing an entire field

The **Occupational Licenses Manager** uses standard Windows conventions for changing the size of a field. When you bring up the Browse Master File using **File**, **Business**, you initially see a display similar to this:

Licenses which appear in gray type are inactive.



The Payments Button leads to the **Receipts** file. Payments may be made from this license window, but is not recommended because it does not allow entering a receipt number or specifying the type of payment. See Entering Payments through the Business File further along in the manual . See Entering Payments through the Receipts File to properly enter payments.

When this button is pressed the window opened will list all payments for the selected business, each identified by the business code to which each was applied.

The Fees Button leads to a condensed version of **File, Business**, Edit Button, Fees Tab - see the Changing License Fees window. If the business has more than one license a pair of "VCR" buttons will appear. These may be used to scroll forward and backward through the licenses for the business.

In this window you can see the license number, business code, business name, and number and street name, but you can't see the suite number, the owner's name, or the NAIC code.

You can click on either the left or right arrow to move the display *incrementally, or you may drag the handle on the scroll bar to move more quickly.*

You can use the scroll bar at the bottom of the screen to move the display left and right. In some of the lengthier fields, the display may be truncated. In order to see the complete contents of these fields, you will need to resize their display.

Position the cursor at the right edge of the column heading to be resized. Drag the column edge right to increase the field display size (or left to decrease it).

Changing the display order

Being able to change the order in which the browse license file screen information is displayed can meet your needs for certain tasks as well as your preferences.

Changes, additions, and deletions to the license file may be made when the list is sorted in any order.

Each of these orders is displayed as a tab above the license file column headings. These tabs function almost like file folders.

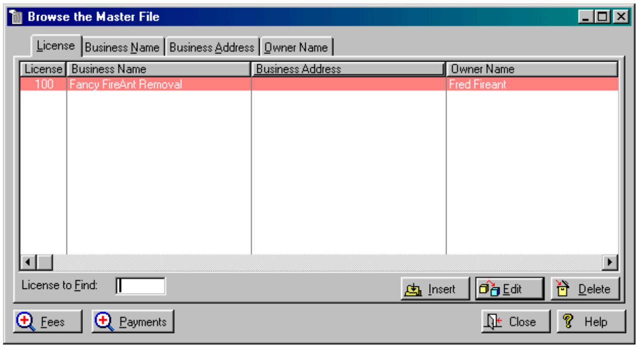
When you click on one, it brings the list in that order to the front. You can then search that section for a specific license, business name, address, etc.

Clicking on Business Name will sort licenses alphabetically by Business Name – Owner name will do the same, sorting owners alphabetically by the name as entered. It is important to remember when entering an Owner name on the license to enter it last name, first name if you will want to search by the last name of the Owner.

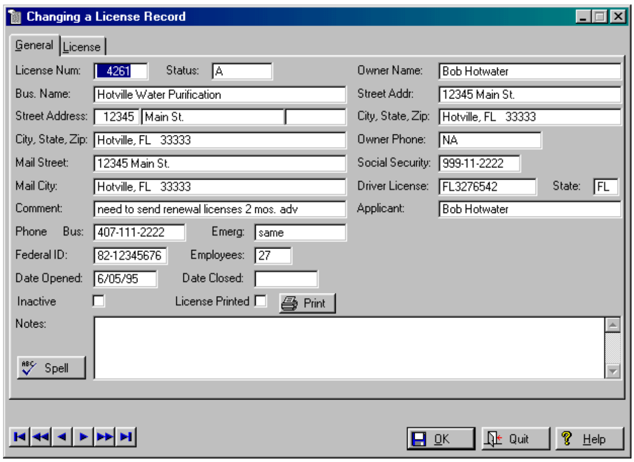
Adding new licenses/ change existing licenses

During the year, businesses which are new to the area will apply for and be issued occupational licenses. The license data will need to be entered into the license file. Go to **File, Business**.

You may locate a license by changing the display order of the Browse the License File screen



To add new licenses click on Insert. To edit existing licenses press the Delete or Edit Button. The Adding a License Record screen appears.



On the General Tab the insertion point is positioned in the **License Number** field, and the next available license number is displayed. This number can be changed, but if it is changed to a number which is already in use, you will get a CREATES DUPLICATE ENTRY KEY error when you attempt to add the license.

You may use alphabetic entries here also. Licenses may be renumbered to any unused number. If the multiple license option is installed all licenses for a business will be renumbered. All receipts will also be renumbered so they will remain with the license.

Both the new master business file and the license file have a **Status** field. It will hold 8 characters. This is a user defined field which is not used by the system. The **Status** field in the license file is the same size but has a different function. It is one of the license key fields, and is restricted to 5 predefined values: *New, Renewed, Transfer, Inactive, and Other*.

Enter the information requested into each field. For more information on what each field should contain, consult the Glossary. When you are finished with a screen, click on the next tab (e.g. Misc., Owner, or Fees) to go to the following screen.

The default information for City, State and Zip will fill in each field as you tab through the form. These fields can be changed on the form by the user, if they are different from the default. When viewing a license with *View Only* access, no changes are allowed, and the social security number is not displayed.

The information for city, state and zip that is the default information comes from **Setup, Titles** – Default City and State.

Each business and each of its licenses may be flagged as inactive individually. Setting the inactive flag on a business automatically sets all of its licenses inactive, but they may be also set individually. Licenses cannot be printed for inactive businesses.

When a business has a single license the license print button will print when the OK Button is pressed. If the business has multiple licenses the print button will cause all licenses for that business that are not already flagged as printed to be printed when the OK Button is pressed. There is also a Print Button on the License Tab. This works exactly as the one on the General Tab, except that it prints only the license for the currently selected business code. When adding a business to the master file, the license file will be updated if the license number is changed from the system generated value.

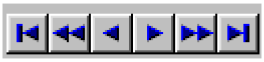
The **License Printed** checkbox on the General Tab works if there is only a single license for the business. The corresponding checkbox on the License Tab will be synchronized with that on the General Tab.

You can add another license to the business being displayed by right clicking and selecting Insert. A new blank tab will be added to the bottom of the window. It will be filled in as soon as a business code for the new license is selected. You can also delete any one of the licenses from this window by first selecting the tab of the license to be deleted, then right clicking on the tab and selecting Delete.

When a license is deleted you have the option of retaining the receipts history or deleting it, provided the option **Deny Receipts Deletions** is not set (**Setup, Configuration Options**). The license is not actually deleted at that time.

The text on the tab of the license to be deleted will change to red, indicating it will be deleted. The actual deletion takes place when the OK button is pressed. All changes to a business made using **File, Business**, Edit Button are temporary until the OK Button is pressed.

All changes, including adding or deleting licenses or receipts, may be rescinded by pressing the Quit Button or the Escape Key. The exception to this rule is if the VCR buttons at the bottom of the window are used. Changes made to the current business and its licenses will be saved before moving to the next business. Think of the VCR buttons as performing the same actions as pressing the OK Button, selecting another license, and pressing the Edit Button.



"VCR Buttons" First Record through Last Record - 4 other buttons available also. Each has a definition that drops down if you place your cursor on it. With these buttons you may step through the file in the selected key order. You may also go forward and backward in 10 record steps as well as go to the first or last record in the file.

Note that if a license record is changed the change will be saved when any of the VCR Buttons is pressed. If the OK Button is pressed any changes to the current record will be saved and the update window will be closed.

When the "VCR" buttons at the bottom of the window are used to scroll it is to the previous or next business, not license for the business. There are only two tabs at the top of the window, General and License.

Notice the Spell Check Button.

The **Notes** field for the business is on the General Tab and the **Notes** field for each license is on the License Tab. When data is converted from previous versions the notes field will be identical in both windows. The fields on the General Tab are related to the business and thus are the same for each license.

The information specific to the license record is displayed on the License Tab. When the License Tab at the top of the window is selected, and the business has more than one license, the business code related to each license will be shown as tabs at the bottom of the window. The currently selected license will be displayed in bold type. All of the information displayed will be that of the currently selected license.

The fees shown on the License Tab are the current fees for the license being displayed. If the business has multiple licenses a **Show All** checkbox will be available. When this box is checked the amount of fees and payments shown will be the sum of all licenses for the business.

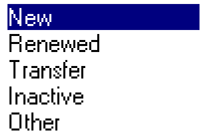
Remember to use the Tab Key to move to the next field.

On the License Tab fill in the **Business Code**, the **Units**, and the different **Fee** and **Paid** amounts for the different fields. When the business code of a license is changed all receipts for the license will be updated accordingly. Any receipts listed in **Payment History** for the license being viewed will disappear as soon as the business code is changed, but will be updated when the OK Button is pressed and reappear the next time the license is viewed.

Enter the **BASE** fee amount, and the **Total Amount** will be figured automatically. Type in the **Date Paid**, the **Receipt** number, and check the **Payment Type**. Any license may be flagged individually as **Exempt** from any fee type.

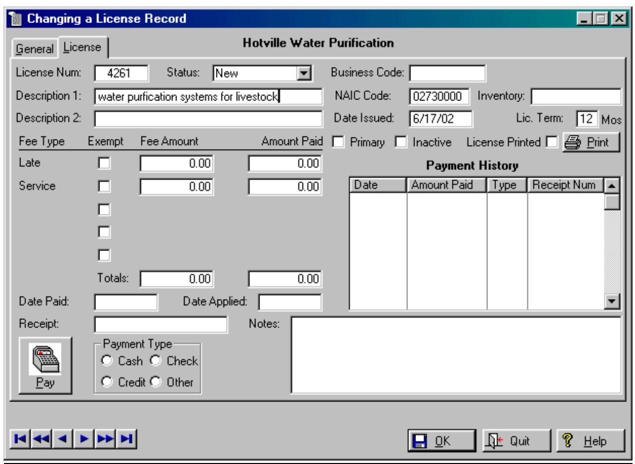
Select one of the following from the Status field. The **Status** field in the license file is the same size but has a different function than the status field on the General Tab (business information). It is one of the license key fields, and is restricted to 5 predefined values: *New, Renewed, Transfer, Inactive, and Other.*

When viewing a license using **File, Business,** Edit Button, License Tab the **Units** field and prompt are hidden or revealed depending on whether or not there is a value in the **Units** field of the business code.



When editing a license record you will be required to select from one of these options instead of being allowed to enter anything you desire. When this release is installed the status code will be assigned according to following rules:

If the license is flagged as inactive the status will be set to "Inactive". If the license term is less than 12 months the status will be set to "New". Otherwise it will be set to "Renewed". When licenses are added (**File, Business**, Insert Button) they are automatically given a status of "New". When fees for the new year are computed (**Compute, License Fees**) all active licenses will be given a status of "Renewed". You may select a report that prints a business list for a selected status (**Print, Business List, By Status**).



If the multiple license option is installed, any license of a business may be designated as a **Primary** business activity for the business. In version 4.400 all licenses will be flagged as primary upon installation. When either of the merge utilities are used, all merged licenses will have the primary flag cleared. The purpose of this added field is to support giving discounts to licenses other than the primary one.

If a business has multiple licenses, a separate comment is available for each license as well as for the business. The business comment is displayed in **File, Business,** Edit Button, General Tab, and the license comment is displayed on the License Tab. When data is converted from version 4.3x the comment from the old master record is copied into the license record. When a license is added to a business the comment on the General Tab will be copied into the comment field of the new license, but may be changed as desired. The form printing option in **Setup, Printing Options, Field Options, Comment Above Address** refers to the license comment, not the comment on the General Tab of **File, Business**, Edit.

A system field (**Setup, Fee Types, Discount for Secondary Licenses**) allows specifying the percent discount to apply when computing the license fee for licenses other than the primary one. Note that the discount applies only to the first fee category, usually the license fee. If the discount field is left at zero the **Primary** flag will have no effect on fees. There is no limit on how many licenses for a business may be designated as primary (anywhere from none to all). The primary flagging option is not available if the multiple license option is not installed, because it would serve no purpose. See also Setup, Fee Types for creating these fees.

Cash Register Button
This button allows you to pay the balance owed. Pay by check, cash, credit, or other.

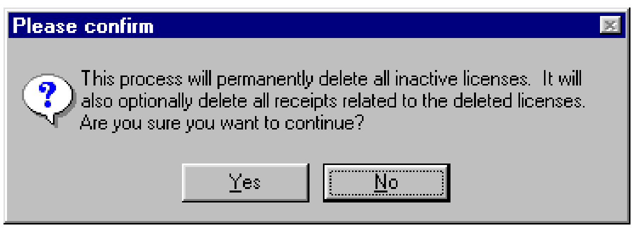
When viewing a license the date paid is displayed for individual licenses. The actual amounts paid are displayed in the Payment History window, but this is still an entry field if a payment is added in this window.

To review this procedure for users with a short memory, the fields in the **Fee Amount** and **Amount Paid** column are entry fields. If amounts are placed in any of the **Amount Paid** fields, a payment will be entered for the difference between the original amounts paid and the new values when the OK Button is pressed.

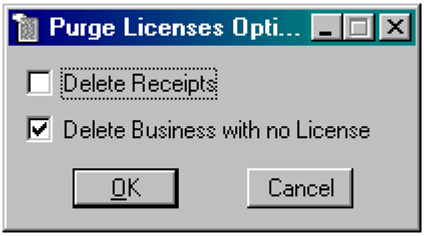
After all the information has been entered, click OK. The license will be added to the Browse License File List. Click on Insert to add more licenses.

<u>Purging Inactive Licenses</u>
You have the option to get rid of all inactive licenses. This should be done only if you do not need any information regarding the licenses and their receipts.

The license is inactive when you have checked the Inactive box on the license change form. When you purge all inactive licenses, the program will delete all receipts related to the deleted licenses. Go to **Utility, Purge Inactive Licenses**.



Purging inactive licenses is usually performed prior to the license year to clean up the license file. Because a license may be purged and the business remain, an option exists to purge the businesses that have no remaining licenses after the inactive ones are purged.



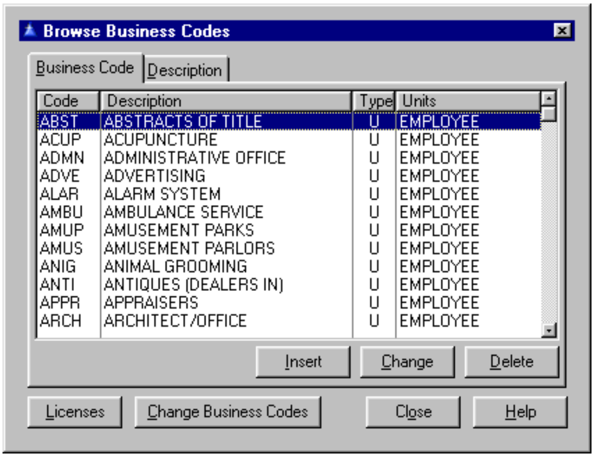
The default option for the checkbox "**Delete Business with no License**" checks for systems that do not have the multiple license option installed. (To explain, the purge utility actually purges inactive licenses, not the master business record. When the option is checked, if after purging all inactive licenses for a business there are no remaining licenses, the master business record will be deleted.) The option to retain the business even if no longer licensed for anything is still available by unchecking the box.

Changing business codes on a group of licenses

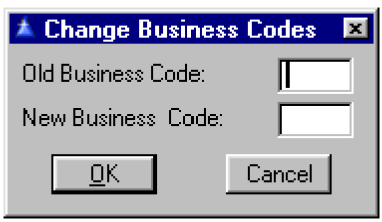
Business codes are used to identify a specific type of business and its corresponding fee structure. Business codes are made up of up to six characters - either letters, numbers, or a combination of both.

When a user desires to change a business code to another code, the licenses using the old code must also be changed and doing that function by hand, one-by-one would be time consuming if there are many licenses assigned to the old code.

A user may desire to change a business code to make it more user-friendly, such as when business codes are all entered using the ordinance number, and the user desires to change them to an alphabetical index, i.e. J13 changes to an abbreviation of ATTY for all attorneys. Go to **Setup, Business Codes**.



To accomplish this change, you would first add in the new business code by clicking on Insert to add in the new business code abbreviation , description and fee structure. Click on the Change Business Codes Button. The Change Business Codes screen will appear.



Enter the old business code name and the new business code name and then click OK. *Example:*

To see a list of all current business codes, press F3. If the Select Business Code screen appears the system is telling you the old code is not in the file. Simply click on Cancel and continue.

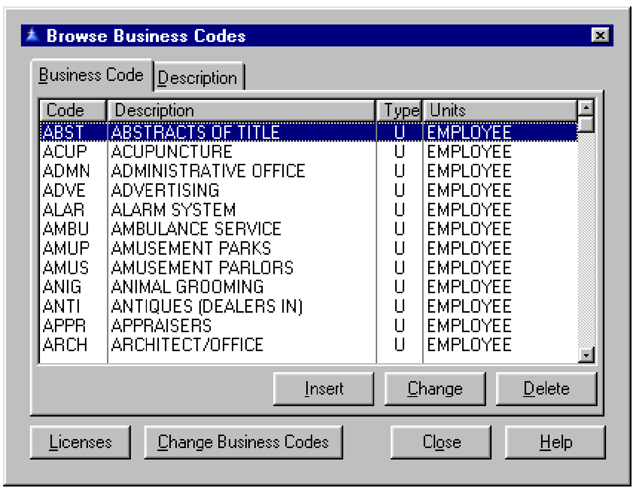
If you change the name of business code A14 to Automobile Dealers (AUTO-D) then all licenses with a business code of A14 will change to a business code of AUTO-D.

Changing information about a specific business code

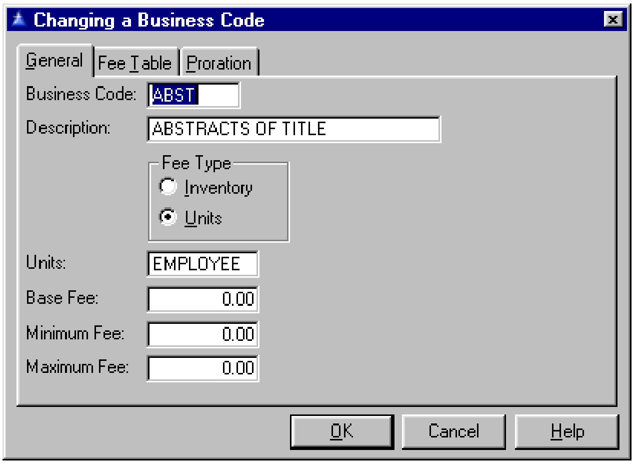
Business codes are used to identify a specific type of business and its corresponding fee structure. Business codes are made up of up to six characters - either letters, numbers, or a combination of both.

For an in-depth discussion of business codes see Business Codes.

There are two types of information to be entered for each business code: General and Fee Table. If fees are based on inventory, you will also need to enter rounding information. Each of these appears as a separate tab on the screen. Go to **Setup, Business Codes**. The Browse Business Codes screen will appear.



Highlight the business code you wish to change and click on Change. The Changing a Business Code screen will appear.



For more detailed instruction on business codes, refer to "Entering business codes based on units" and "Entering business codes based on inventory".

The current information about that business code is displayed. Make changes as necessary. Click on the other tab(s) (Fee Table, Rounding folders when inventory is selected) to make changes on those pages. When all the information is correct, click OK.

Collecting license fees

As payments are received on licenses, they are entered into either the license file or the receipts file. Instructions for entering payments through the receipts file follows this section. Entering payments through the **File, Receipts** selection is the quickest way to enter many payments for many licenses.

If you do not want any receipts to be deleted, select Deny Receipts Deletion in the Configuration Options. They may then only be deleted by a reversing receipt.

Entering payments through the license file

This would normally be used only when you have a new license and after inputting the information on that license, you would input the collected receipt information at the same time. Pull down the **File** menu and select **Business**. The Browse the Master File screen will appear.

Payments may be added in any of three ways. A payment may be entered in **File, Business, Edit**, License Tab. (see also the License File) If the business has more than one license the payment entered will be applied to the license indicated by the lower tab with the business code in bold type. If the license has a prior payment, the amount added to the receipts file will be the difference between the original amount and the new amount.

The receipts file is updated when the OK Button is pressed. The Pay Button (at the lower left of the license window, with a cash register icon) may be used to save keystrokes. It will fill in the payment amounts in each fee category to fully pay the license, and set the payment date and the apply date (if enabled) to defaults. All that needs to be entered is the payment type and the optional receipt number. If a business has more than one license you may enter payments individually for any license, or pay them all at once.

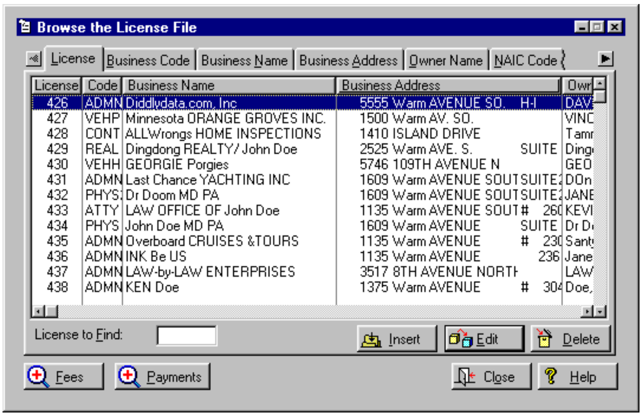
If the **Show All** box is checked the totals for all licenses will be shown. Pressing the Pay Button when the **Show All** box is checked will pay all amounts owed for all licenses. When the OK Button is pressed all payments will be added to the receipts file, a separate payment for each license belonging to this business, each marked with the business code of the license. Payments may also be entered using **File, License**, Payments Button, Insert Button or **File, Receipts**, Insert Button.

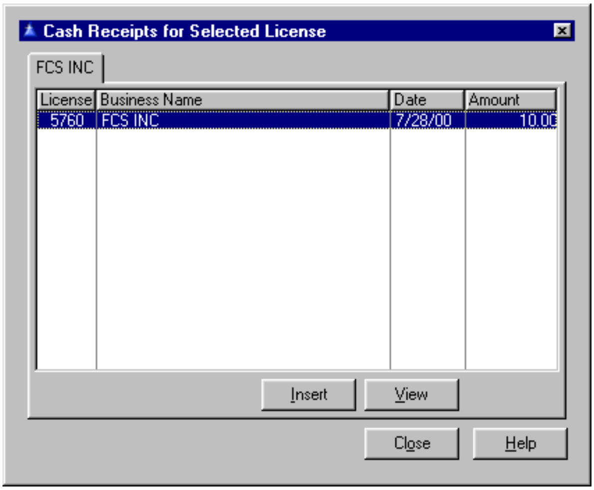
The difference between these two methods is that in the former the license number will be filled in, and in the latter you must enter the license number or use a hot key to browse and select the license.

If the business you selected has a single license the business code will be displayed, and the amount owed will be filled in.

If the business has multiple licenses the business code field will be blank, and the amounts filled in for the payment will be the total of all licenses for this business.

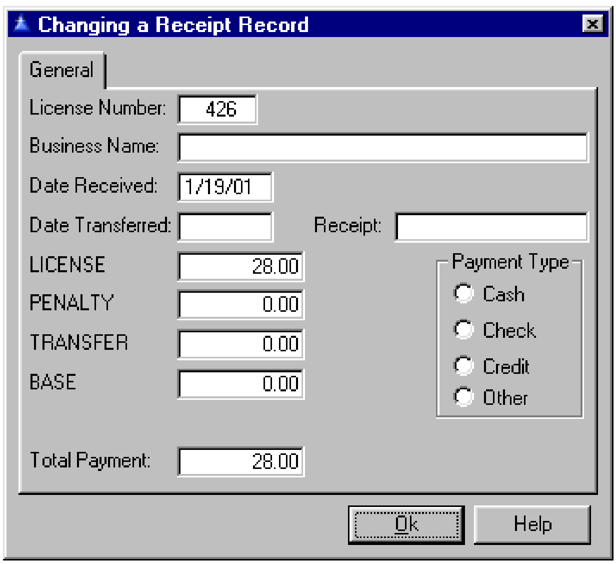
If you accept this payment amount by pressing the OK button you may make all payments in a single operation. A separate payment will be added for each license belonging to this business, each marked with the business code of the license. If you want to enter a payment for only one of the licenses of this business you may enter the business code, or use a hot key to get a drop list of the licenses for this business. Once you select the business code the payment amounts will be updated to that owed for the selected license only.





Highlight the license for which you want to enter a payment. Click on the Payments Button. The Cash Receipts for Selected License screen will appear.

Click on Insert to add information. The View Button just lets you view it. The Adding a Receipt Record screen will appear.



The selected license number and business name will be displayed as well as **Payment Type.** When the **Enable Apply Date** box is checked in **Configuration Options**, the **Date Applied** field will be displayed. This date field, when filled in, allows tracking payments for license renewals paid in the old fiscal year , that need to be applied in the new fiscal year for which the license will be issued. If this option is enabled, receipts reports may be printed based on either the date received or the date applied. The date applied for payments made using **File, License**, Edit Button is written to the cash receipts file The date in the **Date Received** field is the current system date. You may change the date these payments are posted by changing the date shown.

You may locate a license by changing the display order of the Browse the Cash File screen. See *Changing the Display Order*.

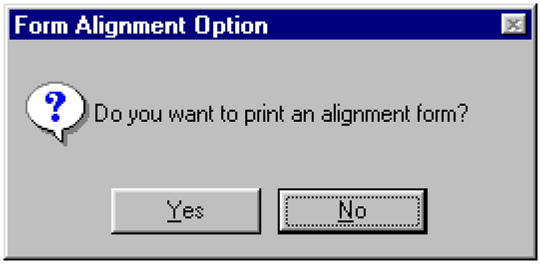
The date in the **Date Received** field is the current system date. You may change the date these payments are posted by changing the date shown. You may change the date these payments are posted by changing the date shown. When the information is correct as shown, click OK.

Printing licenses

Licenses may be printed in any one of five orders: license order, business name, business address, business code, or owner name. When the total fee amount is printed on forms, the prompt will show ‘Total Paid" on license forms.

Go to the **Print** menu and select **License Forms**. Click on the order in which you want the licenses to print.

If you’re using *Form 1 (dot matrix)* the program asks you if you want to check the alignment of the forms in the printer.

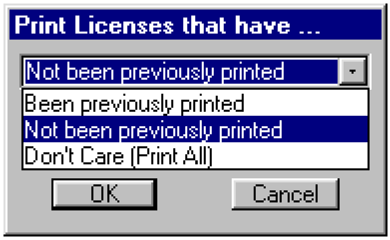


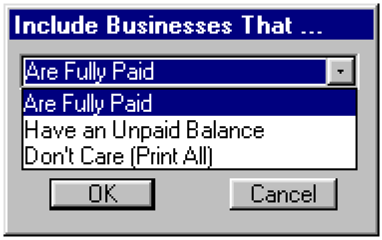
Most users will be using license format 2, 3 or 4 which are all laser forms, and in that case, will not be asked to print an alignment form.

If you choose Yes, a test form will be sent to the printer. You will be given the opportunity to print as many test forms as you need to. If you choose No, the program will continue with the next prompt.

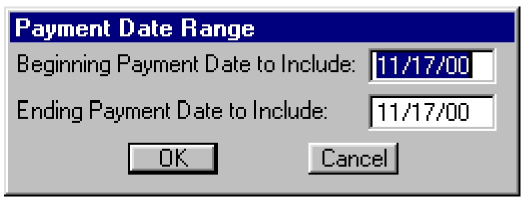
Now you may choose which licenses to print: those not printed before, those printed before, or all. When this screen appears, the default is those not previously printed. When printing a group of licenses, which have been receipted all week, this option of those not previously printed will only print those licenses that have not been previously printed, such as those licenses printed individually or in prior weeks. Click on the down arrow in the field to see the other options. When you've made your choice, click OK.

Now you'll be asked to choose the payment status of the businesses to print licenses for: Your choices include those fully paid, unpaid (those with unpaid balances), or all. The default is those which are fully paid. Click on the down arrow in the field to see the other options. When you've made your selection, click OK. Again, by selecting the default of those licenses not previously printed, and those which are fully paid, the user can receipt licenses all week and then print all the receipted licenses at one time.

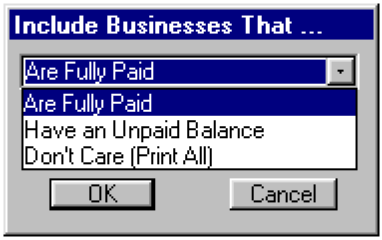




If you chose to print licenses for businesses paid in full, you are given the option of specifying the payment dates you want to include. (In other words, "Include business which paid between this date and this date.") The default is the current system date and can be changed to include whatever date range the user prefers. With this option, the user can print paid licenses daily, weekly or for whatever time period chosen. Enter your choices and click OK.



If you chose to print licenses for all licenses or those with an unpaid balance, the next screen will be displayed.



A print range screen appears for the order you selected (license number, business name, business address, business code, or owner name). Enter the beginning and ending points for the renewal notices you want to print and click OK. The default for any of these categories will be the first license in that category to the last license in the category, and ONLY licenses the meet all selection criteria will be printed.

A confirmation screen will appear showing the options you have selected. Review the information. If it is correct, choose OK. If it is not what you wanted, click Cancel. Once you've chosen OK, the licenses will be sent to the printer.

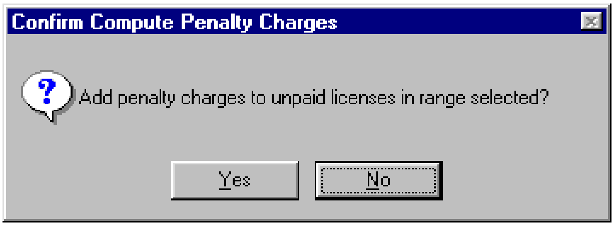
Penalty Charges

If your system is set to **Enable Penalty Calculation** then penalty charges may be calculated automatically for those licenses which are unpaid. These calculations are generally done at the beginning of the penalty month. (For information on **Enable Penalty Calculation**, refer to Configuration options).

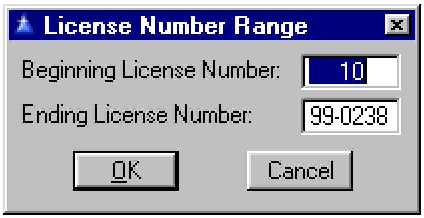
Penalty charges are computed based on the penalty schedule. (For more information, see Penalty schedule). Once the Penalty Schedule has been set up you are ready to compute.

Pull down the **Compute** menu and select **Penalty Charges**.

A prompt appears asking you to confirm that you want penalty charges added to all licenses in the range you will specify at the next prompt. Click on Yes to continue, or No to cancel.



A license number range screen will appear. Enter the beginning and ending license numbers to compute penalty charges for. The defaults shown are the first and last license numbers. Click OK.



The penalty charges will be computed. They appear in each license record , on the second fee type which should always be named PENALTY.

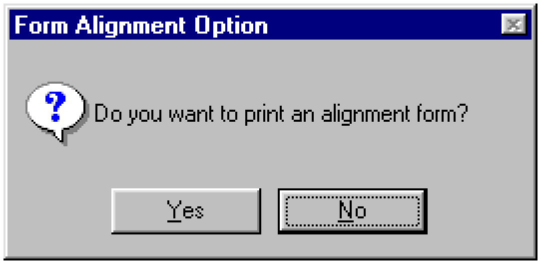
Printing Delinquent Notices

See Printing Options for more information on forms.

Delinquent notices may be printed in any one of five orders: license order, business name, business address, business code, or owner name.

Go to **Print, Delinquent Notices**. Click on the order in which you want the notices to print.

If you're using certain forms the program asks you if you want to check the alignment of the forms in the printer and on some you may preview the report.



If you choose Yes, a test form will be sent to the printer. You will be given the opportunity to print as many test forms as you need to.

If you choose No, the program will continue with the next prompt.

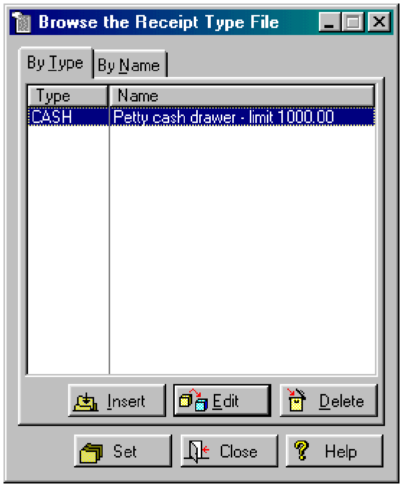
A print range screen appears for the order you selected (license number, business name, business address, business code, or owner name). Enter the beginning and ending order for the renewal notices you want to print and click OK.

When the total fee amount is printed on forms, the prompt will show "Total Due" on renewal and delinquent forms.

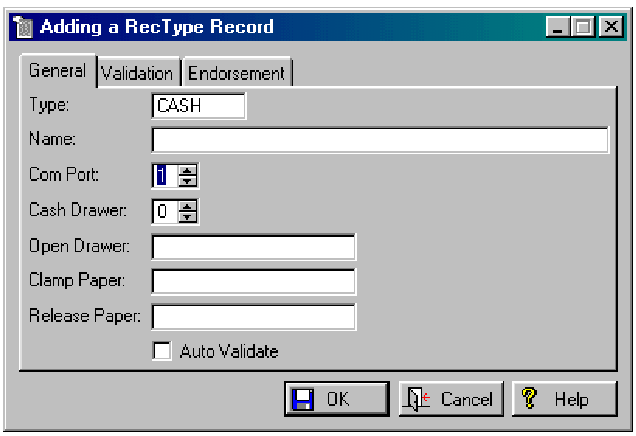
A confirmation screen will appear showing the options you have selected. Review the information. If it is correct, choose OK. If it is not what you wanted, click Cancel. Once you've chosen OK, the notices will be sent to the printer.

Receipts

Go to **File**, **Receipts.** Information about payments received is stored in the receipts file. If you have not set up your receipts types you will need to do this before working with any receipts. Go **to Setup, Receipts Types**. Select Insert to add new receipt type information or Edit to change existing receipt type information.



This button will set the selected receipt type as the default.



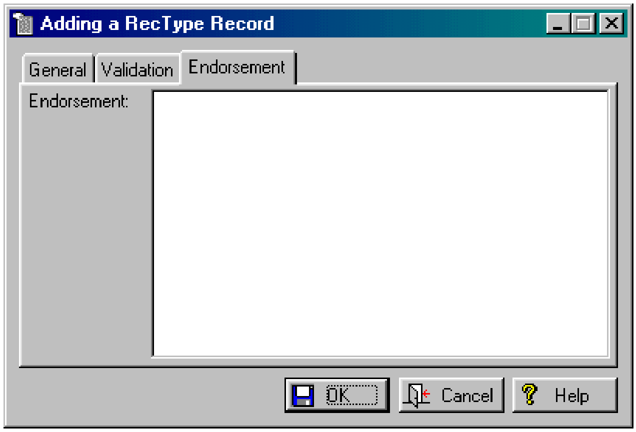
A serial validation/receipt/endorsement printer may be used when entering receipts. Before it can be used, at least one Receipt Type must be set up. Once a receipt type has been set up, it must be assigned to the current station by pressing the Set button. When viewing receipt types, the assigned type will be displayed in red.

The receipt type assignment is stored locally, so each workstation may have its own receipt type. Each receipt type specifies the com port and cash drawer number, and the codes for manipulating the printer and cash drawer. It also specifies the text printed when validating a receipt or endorsing a check. The validation or endorsement text may contain any of five "dollar codes" representing runtime variables:

$D = Date
$T = Time
$Y = Receipt type name
$R = Receipt number
$L = Amount received

When the text is printed the symbols will be replaced with the current value of the specified variable. If an assigned receipt type with a com port specified exists, a printer control window will pop up when receipts are added, with buttons to open the cash drawer, print a receipt, etc. Only a single validation will be offered for each payment, whether it is for a single license or a multiple license business.

The receipts will always be saved individually for each license, however. If the printer control window does not appear then there is either no assigned receipt type or no com port is specified in the assigned type. When a payment for several licenses for a business are entered as a single payment using **File, Receipts**, the payment date is updated on all licenses.



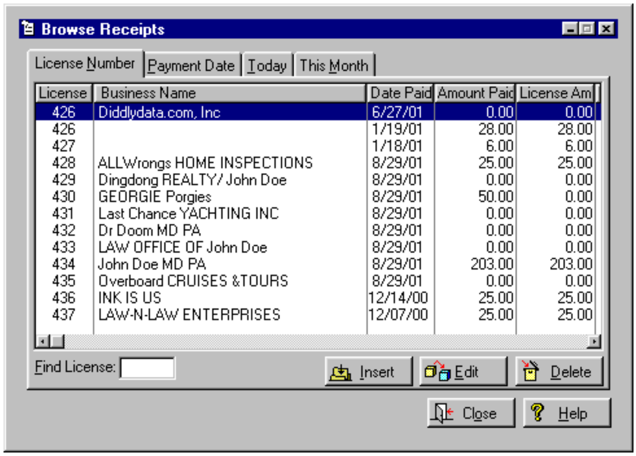
You may view and edit the receipts for today, this month, in order by license number, or in order by payment date. A default date may now be set for the apply date for payments. When configured for apply date, **Setup, System Date** will also allow setting the apply date. When payments are entered the date will be filled in automatically from the default.

The Browse the Cash File screen appears. The License Number Tab is on top showing the cash receipts for the current day.

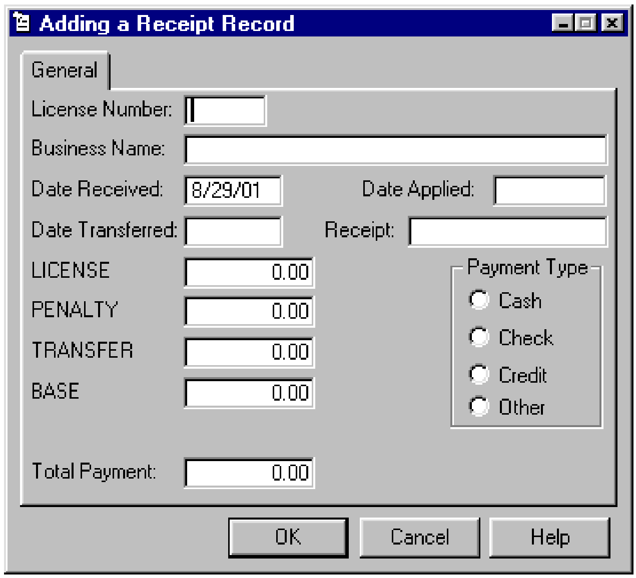
To view the cash receipts for the current month, click on the This Month Tab. To view all of the cash receipts for the current fiscal year, click on either License Number or Payment Date to display them in the desired order.

Entering payments through the receipts file

Go to **File**, **Receipts**. The Browse the Cash File screen is displayed, with the Today Tab on top.



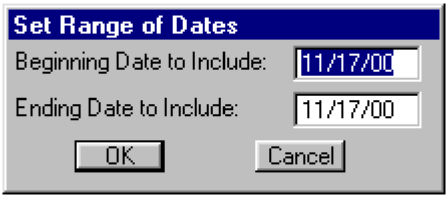
Click on Insert to add information. The View Button allows you viewing of the information only. The Adding a Receipt Record screen will appear.



Enter the license number of the desired business and press Tab. The business name will be displayed as well as **Payment Type**. When the information is correct, click OK. If **Deny Receipts Deletion** is checked in Configuration Options, you cannot delete a receipt record by pressing the Delete Button. You must use a reversing receipt.

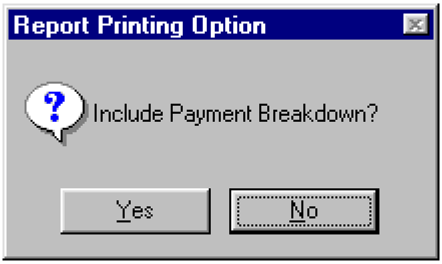
Printing a receipts report

Receipts reports are used by accounting departments to reconcile licenses paid with money received.
Go to **Print, Receipts Report**. The Set Range of Dates screen appears. The business codes will print to aid in identifying payments by businesses with multiple licenses.



Enter the start and end dates for this report. Click OK. The Report Printing Option screen appears.

Press F3 to display a calendar for the current month. Double click on the desired date.



Click on Yes or No to have the fees to which the payment was applied appear on this report. The program asks you to confirm your request.

Double-check the dates displayed on the screen to make sure they match what you wanted. Click OK to proceed, or Abort to cancel.

See Print Preview

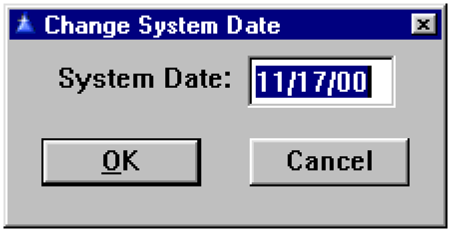
The program asks you if you want to preview the report. If you wish to view the information on the screen, choose Yes. If you wish to have it print to the printer, choose No.

If you chose No, the report will be sent to the printer. If you chose Yes, the report will be displayed on the screen after it is generated. You can view the report and then print it from the print preview screen. See Appendix B for a sample of this report.

System Date

Go to **Setup, System Date**. Within the configuration options, you can set up your **Occupational Licenses Manager** so that it automatically gets its system date from the computer (see Configuration Options). If you don't enable **Auto System Data Maintenance**, then you'll use this function to update the system date.

However, even if your system date is maintained automatically, there are times when you need to change it for certain activities. An example of this would be changing the system date so payments entered would be posted on the date received, rather than the date entered. A default date may be set for the apply date for payments. When configured for apply date, **Setup, System Date** will also allow setting the apply date. When payments are entered the date will be filled in automatically from the default.

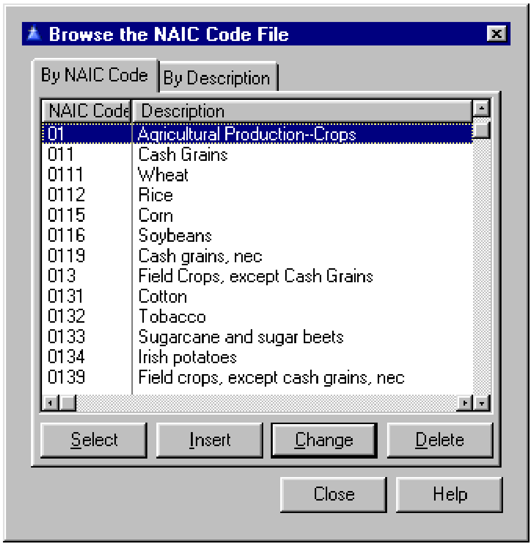


Enter the desired system date in the format MM/DD/YY. Click OK.

Editing NAIC Codes

The NAIC codes, or North American Industrial Classification codes have been entered into the NAIC Code File for use in the License File. If for some reason changes (or additions) need to be made to these codes, they may be made under **File, Business** or under **Setup, NAIC Codes**, Change Button. The installation will create a business code for each record in the NAIC code file (siccode.ol) for users that prefer to have their business codes correspond to the NAIC system. It can also be used with an existing business code file. It will add the NAIC codes to the existing codes. In cases where the code has already been used it will leave the existing business code unchanged.

Go to **File, Business.** Select any entry and press the Edit Button. You aren't actually going to change the license information, you are just going to get a pop up screen of the NAIC codes to change them. On the General Tab Press F3 when your cursor is in the **NAIC Code** field. The Browse the NAIC Code File screen appears.

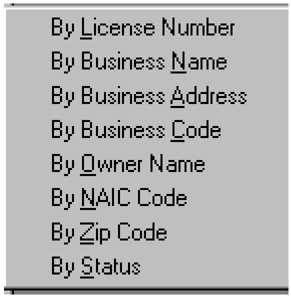


Click on the Change Button when you have highlighted a code. The Changing a NAIC Record screen will appear.

Click on the NAIC code to change. Make changes to the code and description as necessary, then click OK. Click Close when you are done.

Printing the Business List

Go to Print, Business List. The **Occupational Licenses Manager** prints several reports to help you manage your licenses. The Business List will print a list of a range of businesses in the order you choose. Click on the order you want the businesses printed from.



The information included in this report is the license number, business name, business address, business code, telephone number, fees, amount paid, and date paid and balance.   You may select to print active only, inactive only.

The Print Range screen will appear. (Which Print Range screen appears will of course depend on the order you want the business to appear in.)

Pressing F3 will cause the Browse License File screen to appear so you may choose the first/last license with Select or a double-click.

The first and last records in the license file are shown as defaults in the print range screen.
Enter your desired starting and ending points and click OK.

The program then shows you the order and range of licenses you've chosen to print and asks you to confirm it. If what is shown is correct, click OK. Otherwise, choose Abort.

You'll be asked if you want to preview this report. If you'd like to see the report on the screen, click OK.

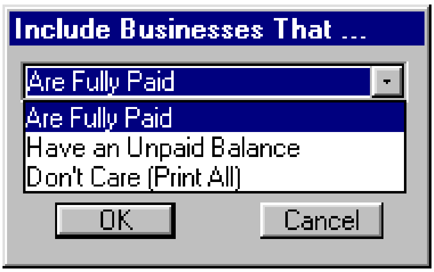
If you chose Yes, the Print Preview screen will appear. See Print Preview for information on this screen. If you chose No, the report will be sent to the printer. See Appendix B for a full size sample of this report.

Printing Business Details

The **Business Details** report will print a list of all the information in the license file about a range of businesses in order by license number, business name, business address, business code, owner name or NAIC code, zip code, and utilities. The details include license numbers, code numbers, Federal ID number, date issued, opened, and closed.

Go to **Print, Business Details**. Click on the order you want the businesses sorted in.

Now you'll choose the payment status of the businesses to print the detail for: Your choices include those fully paid, unpaid (those with unpaid balances), or all. The default is those which are fully paid. Click on the down arrow in the field to see the other options. When you've made your selection, click OK.



Pressing F3 will Cause the Browse License File screen to appear again.

The Print Range screen will appear. (Which Print Range screen appears will of course depend on the order you want the business to appear in.) The first and last records in the license file are shown as defaults in the print range screen. Enter your desired starting and ending points and click OK. You'll be asked if you want to preview this report. If you'd like to see the report on the screen, click OK. If you chose Yes, the Print Preview screen will appear. See the Print Preview for information on this screen. If you chose No, the report will be sent to the printer. See a full size sample of Business Details.

Printing the Business Code List

The **Business Code List** will print a list of all business codes currently in the system along with a description, the type, type of units, base fee, minimum fee, maximum fee, and number of licenses with that business code. It can be printed with or without the related fee schedules.

Go to **Print** menu and select **Business Code List**. You will be asked if you want to include fee schedules in the report. Click on Yes or No.

You'll be asked if you want to preview this report. If you'd like to see the report on the screen, click OK. If you chose Yes, the Print Preview screen will appear. See Print Preview for information on this screen. If you chose No, the report will be sent to the printer. See the full view of the Business Code List.

Utilities

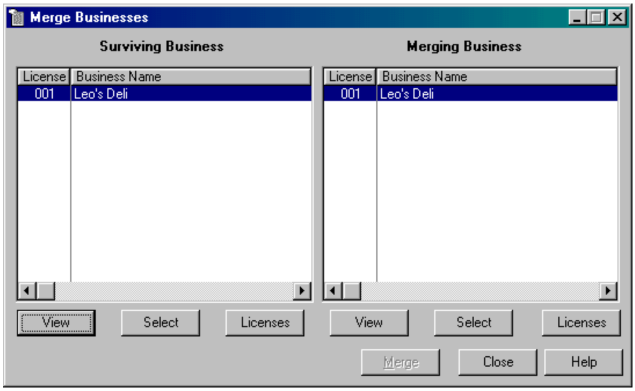
There are 6 utilities. Some are covered in more detail under the appropriate sections.
Adjust Fee Rates

Purge Inactive License

Justify Street Numbers
Go to **Utility, Justify Street Numbers**. This will run a check on the street numbers and justify them all to the right or left.

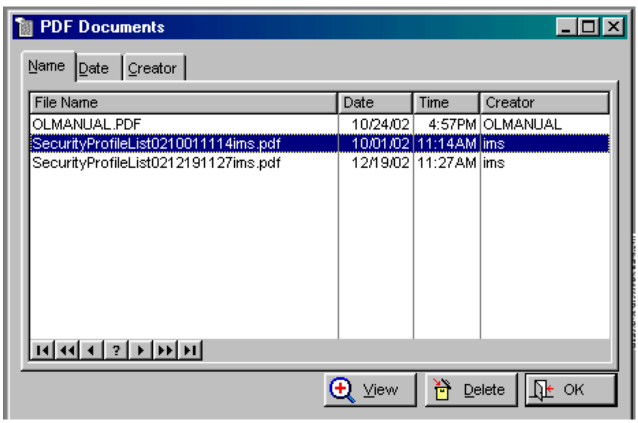
Blank Business Codes

Merge Duplicate Businesses
Go to **Utility, Merge Duplicate Businesses**. You may merge individually or mass merge. Select the **Surviving Business** and the business that will be merged into it. Pressing the License Button will allow you to browse a list of licenses associated with each business. The View Button allows you to view the license form for each one.



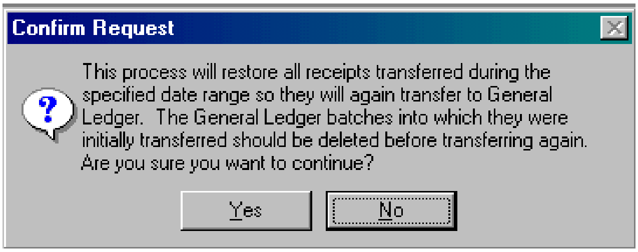
Purge PDF Reports

Go to **Utility, Purge PDF Reports**. This utility will purge archived PDF reports. Whenever a date is entered for the oldest report to retain, the list of candidates for purge (older than the date specified) is updated. Pressing the Delete Button will delete the list. This utility functions similarly to the PDF view and Print procedure in that only the documents created by the logged in user will be shown unless the user has *Supervisor* access, in which case all documents are shown. You may also delete or view these pdf reports under **Print, PDF Reports**.



Restore Transferred Receipts

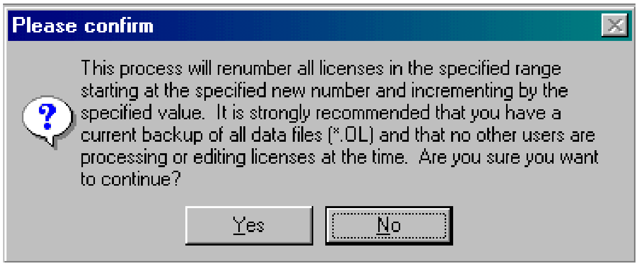
Go to **Utility, Restore Transferred Receipts**. A utility program that restores receipts that were previously transferred within a specified date range so they may be transferred again. This utility is limited to users with system update access or higher. It should be used only in extraordinary circumstances. All **General Ledger** transaction batches from **Occupational Licenses** during the specified time period must be killed to prevent double posting of receipts. There is an important distinction between this utility and similar ones in **Accounts Payable** and **Building Permits**: This utility uses the date the receipts were transferred, not the date they were received.

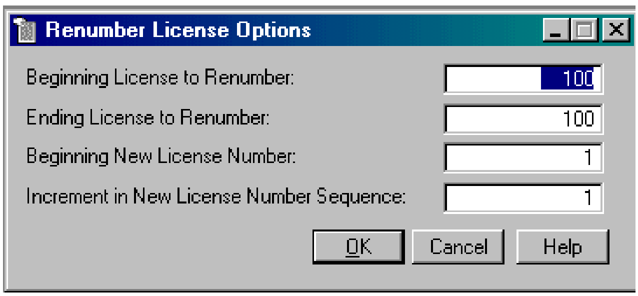


Renumber Licenses

Go to **Utility, Renumber Licenses**. This utility may renumber in whole or in part. Licenses may be renumbered partially by specifying the range of old numbers to be renumbered. If all licenses are renumbered there will never be a number conflict. If a partial renumbering is specified, the licenses outside of the range to be renumbered will retain their old numbers. If the new number of one of the licenses being renumbered is the same as the existing number of one of the licenses not being renumbered, an error message will be displayed and the renumber process will not take place.

The Master, License, and Cash files are affected by the renumber process. The original files will be saved with a .BAK extension after the process is completed. If for any reason you don't want to retain the new numbers, data may be restored to its old form by copying the three .BAK files over the corresponding .OL files before any other changes are made.





PDF Reports

Go to **Print, Reports, PDF Reports**. The option to create PDF files of reports was added. This option is available only if the PDF module is installed. To set it up, go to **Setup, Configuration Options**. See the location for PDF information.

If the PDF module is installed two new checkboxes (**Create PDF Report Files** and **Disable Hard Copy Reports**) will appear. They work in conjunction with the **Disable Print Preview** checkbox.

Each of the three controls functions individually. Any combination of the three is allowable except the one that disables all print output (**Disable print Preview** checked, **Create PDF Report Files** unchecked, and **Disable Hard Copy Reports** checked). You can, for example, set the system up to create PDF files for all reports without showing a preview or printing a hard copy. If print preview is enabled hard copy must also be enabled if you want the option to print or not print hard copy after viewing the preview.

The printer button will still appear in the preview header, but pressing it will not print a hard copy if it has been disabled in **Configuration Options**. These options affect all built in reports, but do not affect forms such as purchase orders and checks. (A separate PDF purchase order option is described above.)

All PDF report files will saved in the document path and named in the format XXXXXYYMMDDHHMMUUUUU.PDF, where XXXXX is the title of the report (may be up to 20 characters long), YYMMDD is the date the document was created, HHMM is the time it was created (24 hour time), and UUUUU is the login name of the creator.

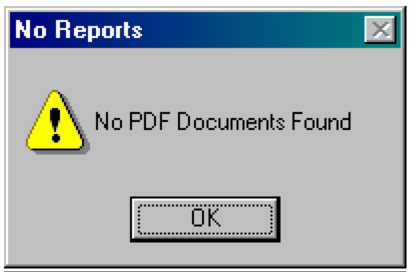
In **Setup, Document Path** should be set to the directory where the PDF documents are to be saved. If left blank they will be saved in the program directory. A menu item at **Print, Reports, PDF Reports** will display all saved PDF documents and allow viewing and printing. You may view the selected document by pressing the View button or double clicking on the document.

The viewing and printing option requires that a PDF viewer be installed on the computer, and registered as the handler of files with the .pdf extension.

The Adobe Reader is distributed at no cost and is available at http://www.adobe.com. The listing of documents may be shown in order of file name, date created, or creator (user login).

Dates are in descending sequence (last first). Only the documents created by the logged in user will be shown unless the user has *Supervisor* access, in which case all documents are shown. (For those curious enough to notice details, the creation time shown in the document list will differ slightly from the time as embedded in the file name.

That is because the file name is assigned at the time the process of generating the PDF is started, whereas the time shown in the Time column is the creation time from the file directory, which is the time the file is saved. The difference is the time it took to generate and save the PDF.) If there are no PDF documents to be found a screen will tell you so.



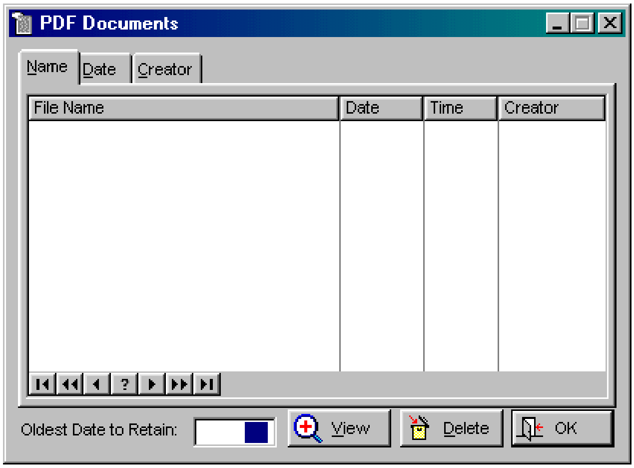
Security rules allow system wide access to reports while restricting delete rights. All PDF documents will now be available to all users unless the creator specifies that it is a private report.

Before a report is created the user will be given the option of flagging it as a public or private report in the same dialog that requests the name to assign to the file. The setting of the private flag is "sticky". That is, it will retain whatever setting was selected for the previous report. It is also saved locally, so that each workstation may have a different default setting. If a report is flagged as private it will be available only to the creator and to users with *Supervisor* access. Otherwise it will be available to all users. A report may be deleted only by the creator or a user with *Supervisor* access, regardless of whether the report is private or not. When this release is installed all existing PDF reports will be treated as public.

The file name displayed in **Reports, PDF Reports** now includes only the basic name assigned by the user. Previously it included creation date and time and the creator. This was redundant information since they are displayed in other columns.

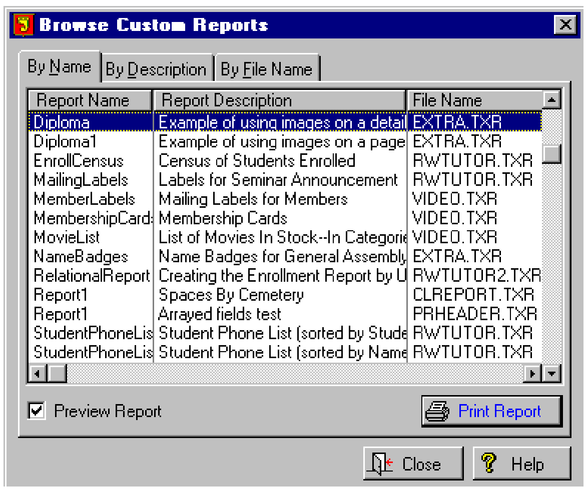
Purge PDF Reports

Go to **Utility, Purge PDF Reports**. This utility allows you to delete pdf reports that you don't want. You may view them as well by pressing the View Button. **Oldest Date to Retain** is the date of the earliest report you want to keep. The Date and Creator tabs simply allow you to view the reports by those categories.



Custom Reports

Go to **Print, Custom Reports, Run Report**. As an option to the **Occupational Licenses Manager**, you may create and print custom reports. This feature allows running reports created by the Clarion Report Writer 5.0 runtime system.



If the Clarion Report Writer has been purchased, it can be invoked from within **Occupational Licenses Manager** to create a new report or modify an existing report. However, it is not necessary for running custom reports created elsewhere. This topic discusses how to print the reports once created. The Browse the Reports File screen will appear.

*Custom report files appear as *.TXR in your **Occupational Licenses Manager** Directory.*

Highlight the report you wish to print. The reports file can be displayed in any of these orders:

Report Name (By Name)
Report Description (By Description)
Report File Name (By Report)

Each of these orders is displayed as a tab above the reports file column headings. These tabs function almost like file folders. When you click on one, it brings the list in that order to the front. You can then search that section for a specific report.

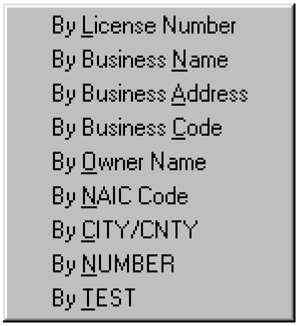
The box in the lower left-hand corner of the screen, when checked, will send a copy of the report as it will appear on your printer to the screen. For more information on this, see Print preview. When you have chosen a report and indicated whether you want it first sent to the screen, click on Print Report.

Printing Letters & Labels

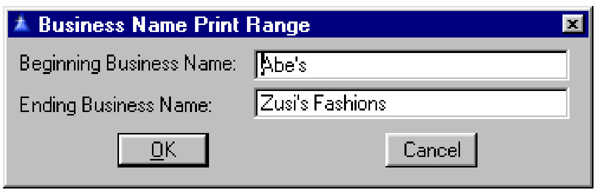
Form Letters

Pull down the **Print** menu and select **Form Letters**. Choose which method you prefer. A box will appear and ask if you wish to preview the report. Select Yes, then check the boxes you prefer - include active businesses or inactive businesses. You may choose either or both options.

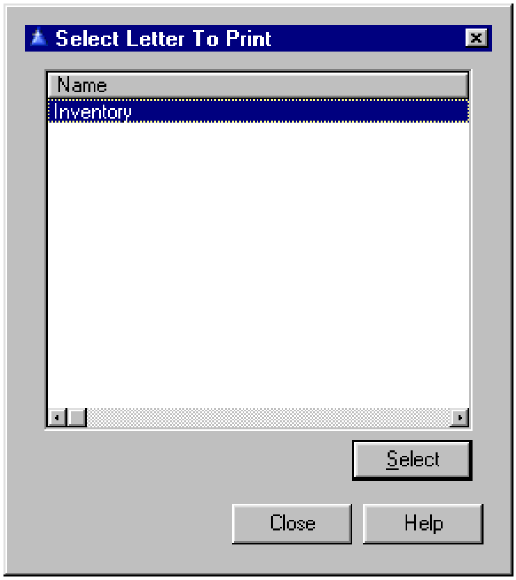
When printing in an order corresponding to a field in the master business file, all licenses for a business will be included. This includes license number, business name or address, owner name, zip code, and any of the user defined fields. If printing in business code or NAIC code order (these fields are in the license record), the report or forms will include only those licenses that qualify according to the parameters specified, and will not necessarily include all licenses for a particular business.



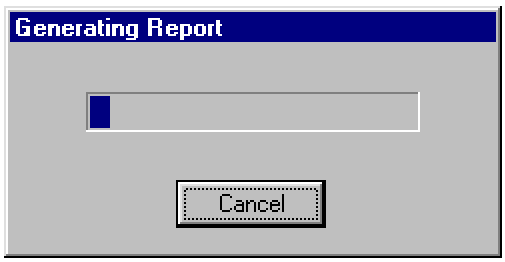
Select the range from which to print. This box will appear no matter which method you choose in step 1. Example 1: By name



To create a new form letter, see Letters.



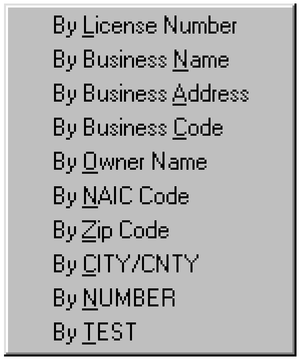
The program will begin processing the report. You will then be taken to the preview screen where you can decide if you want to print the letter as it is.



To make changes, repeat these steps and make different selections. To make changes to the letter itself, go back to the **Setup, Letters**, and make your changes there. You may want to give your new letter a different name if you want to keep the old one as it is.

Labels

Go to **Print, Mailing Labels**. Click on the order you want the businesses printed by.



The program asks you if you want to preview the report. If you wish to view the information on the screen, choose Yes. If you wish to have it print to the printer, choose No. You may also select to print active only, inactive only.

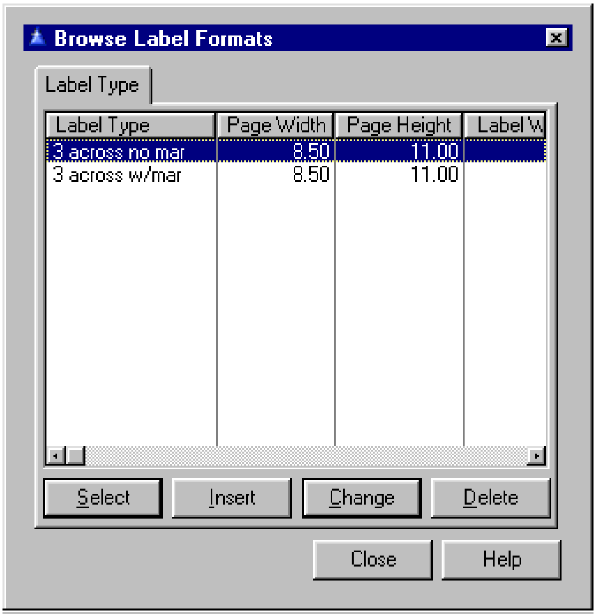
See [Print preview](#).

You'll now choose whether to print the business address or the mailing address on the labels. The default is the business address. Click on the down arrow to see your other choice. When you have chosen, click OK.

See also [Label Formats](#).

Now you'll choose the payment status of the businesses to print labels for: Your choices include those fully paid, unpaid (those with unpaid balances), or all. The default is those which are fully paid. Click on the down arrow in the field to see the other options. When you've made your selection, click OK.

A print range screen appears for the order you selected (license number, business name, business address, business code, or owner name). Enter the beginning and ending points for the labels you want to print and click OK. The Browse Label Formats screen appears.



Highlight the mailing label format you wish to use and click on Select. The labels will be sent to the printer. (To add a new mailing label format click on Insert. For more information, see Label Formats).

Printing the NAIC Code List

The **NAIC Code List** will print a list of all North American Industry Classification System codes and their descriptions. Pull down the **Print** menu and select **NAIC Code List**.

You'll be asked if you want to preview this report. If you'd like to see the report on the screen, click OK.

If you chose Yes, the Print Preview screen will appear. See the Print Preview topic for information on this screen. If you chose No, the report will be sent to the printer. See the full view of the NAIC Code List.

Print Preview

The **Occupational Licenses Manager** has a feature which allows you to see your reports on the screen before they print. This is useful when you only want to see the information on the screen, but it also gives you the opportunity to fine-tune the appearance of reports you will be sending to the printer.

While the report shown on this screen will obviously change from use to use, the print preview screen shows the buttons with a report.

See each of the Print Preview Buttons individually in the Glossary, to explain how they'll affect your report.

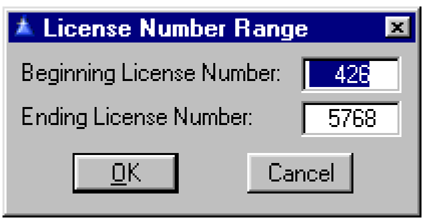
Getting Ready

Computing License Fees

Pull down the **Compute** menu and select **License Fees**. The process of computing license fees clears all the receipts and calculates fees for the new year. This procedure should ONLY be done once a year, before renewal notices are sent. When fees are computed, any payments after this date are applied to the new fiscal year. If no date is entered, a check is made during the initialization process for payments made for a license within the last 6 months.

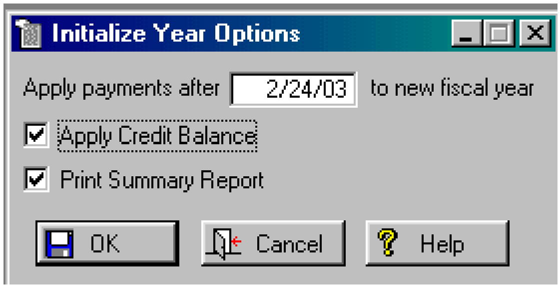
If one is found, the user is warned and the option to skip the license is provided. This is to prevent clearing the payment record for payments already posted for the new fiscal year in the event that a user accidentally initializes a second time. The payments may be in effect moved to the new year by reinitializing with the cutoff payment date specified.

A screen appears asking you the range of the license numbers.



The next screen asks you whether you want a summary report.

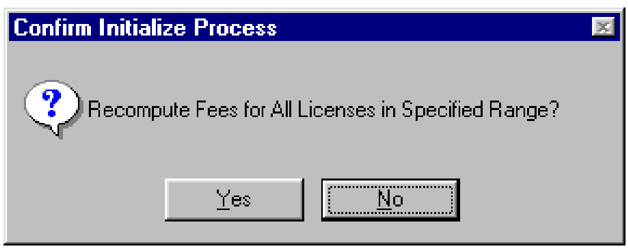
If no date is entered, the program will check for payments made in the last 6 months and warn you with an option to skip the license.



If checked **Apply Credit Balance** it will be applied toward the newly computed fees if the license had a credit balance, effectively reducing the new fees by the amount of the credit. If the license had an outstanding balance it will also be carried forward and added to the fees for the new year. Users of this option should be wary of the possible conflict between this option and the "Apply payments after xx/xx/xx to new fiscal year" option. If a date is entered, and the credit balance is a result of a payment made after the specified date, it will be applied both as a reduction of the new fee and a payment.

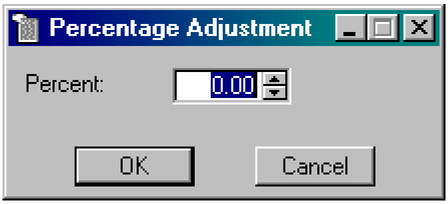
If you prorated fees for new licenses during the year, the fees calculated for the new year will be for a full year, if Adjust Partial Fees in your configuration options is set to Y .

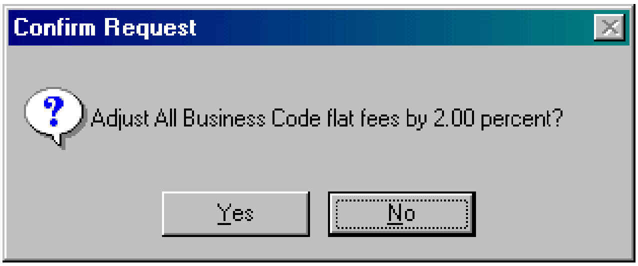
Click on Yes if this is acceptable. The program will begin processing records. This process clears all fees for each license process and recomputes fees. If any fees have been added manually they will be lost. The progress bar will let you know how the procedure is progressing.



Adjust Fee Rates

Go to **Utility, Adjust Fee Rates**. This utility will adjust the base fee amount of all business codes by a specified percentage. Only business codes with a type of "U" and with a blank Units field are affected. If the business code has a maximum fee amount and the new base fee exceeds the maximum, the maximum will be adjusted upward to match. Note that this does not adjust fee amounts in individual licenses, only those in the business codes. The new fees would apply when fees are computed using **Compute, License Fees**, or when a new license is added.



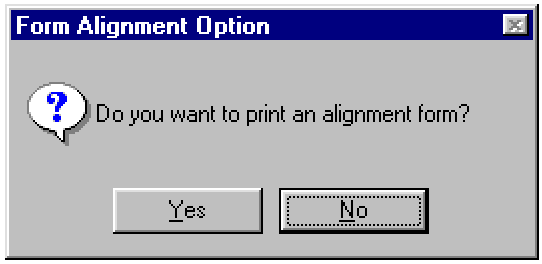


Printing Renewal Notices

Go to **Print, Renewal Notices**. Click on the order in which you want the notices to print. Renewal notices may be printed in any one of six orders: license order, business name, business address, business code, or owner name. When the total fee amount is printed on forms, the prompt will show "Total Due" on renewal and delinquent forms. The logo will not print on the renewal form by business address if the form does not specify a logo.

See Printing options for more information on forms.

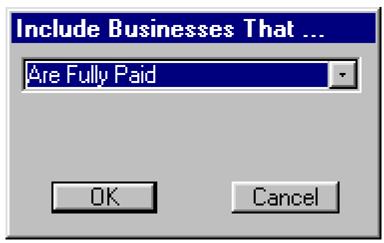
If you're using *Form 1* (dot matrix) the program asks you if you want to check the alignment of the forms in the printer.



If you choose Yes, a test form will be sent to the printer. You will be given the opportunity to print as many test forms as you need to. If you choose No, the program will continue with the next prompt.

When license fees are computed, all payment information is cleared so all licenses are unpaid. You would normally want to select "all" at this option.

Now you'll choose the payment status of the businesses to print licenses for: Your choices include those fully paid, unpaid (those with unpaid balances), or all. The default is those which **Are Fully Paid.** Click on the down arrow to highlight Unpaid and click OK.



A print range screen appears for the order you selected (license number, business name, business address, business code, or owner name). Enter the beginning and ending points for the renewal notices you want to print and click OK.

A confirmation screen will appear showing the options you have selected. Review the information. If it is correct, choose OK. If it is not what you wanted, click Cancel. Once you've chosen OK, the notices will be sent to the printer.

How Fees are Calculated

When your **Occupational Licenses Manager** is installed, you make choices about fee and penalty calculations and prorating. These choices are called Configuration options. Under normal conditions, you'd have no reason to change these. However, if your renewal notices are not what you expected, you might review your choices there.

Appendix A

Parent/Child Relationship Rules

June 2001

All of the IMS program databases have parent-child relationships. It is generally bad practice to allow a database to accumulate orphans, which are child records whose parent has been deleted. Parent deletions can be done in one of two ways depending on the individual situation: either you delete all children when the parent is deleted (cascade) or deny if the parent has any children. The relationships and dependencies are shown as in the excerpt from the data dictionary summary below:

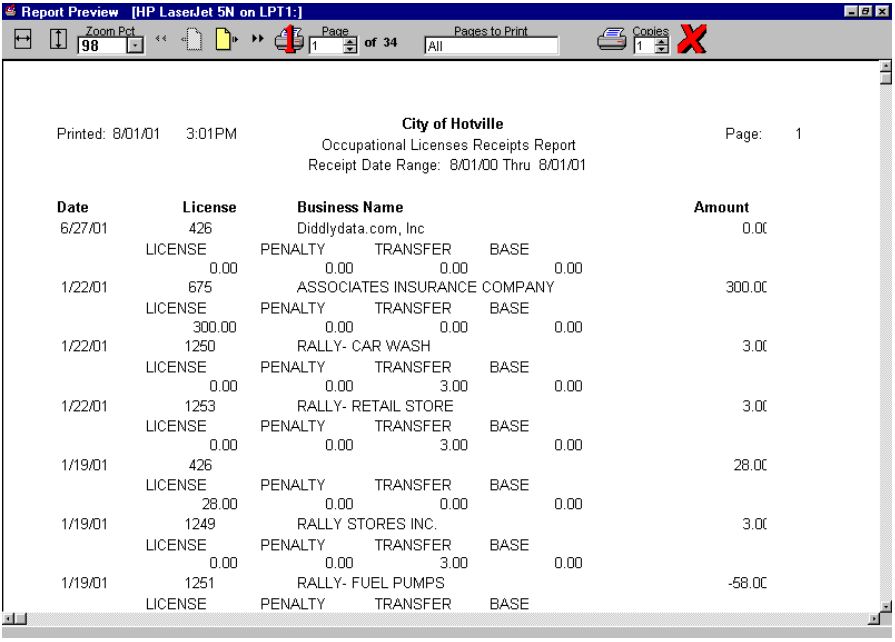
```
WTask
FILE,DRIVER('TOPSPEED'),RECLAIM,NAME(wtaname),P
RE(WTA),BINDABLE !Work order task
By_Task
KEY(WTA:Task),DUP,NOCASE,OPT
!Task Key
By_Order
KEY(WTA:WorkOrder),DUP,NOCASE,OPT
!Work Order Key
WTA:By_Task <<--> TAS:By_Task  Update=CASCADE
Delete=RESTRICT
WTA:By_Order <<--> ORD:By_ID  Update=CASCADE
Delete=RESTRICT
```

The double arrow is on the side of the "many" file in a many to one relationship. So the single arrow points to the parent key and the double arrow to the child. The *Update* and *Delete* indicate what happens when a parent is updated and deleted. A blank means it is allowed and no action is taken. *Restrict* means it is not allowed (the user will get a warning message). *Cascade* means all children will be deleted. In the case of an update action, if a key value in a parent is changed, cascade means all children will be changed likewise.

Appendix B

Large Screens

Print Preview



Business List

Amt & date paid, and balance not shown here, but are included in the report.

Printed 8/01/01 4:30PM

City of Hotville

List of Paid Licenses by License Number

Included in This Report : 426 Thru 441

License	Business Name	Business Address	Code	Telephone	Fees
426	Diddlydata.com, Inc	5555 Warm AVENUE SO. H-I	ADMN	(123)555-5555	28.00
427	Minnesota ORANGE GROVES INC.	1500 Warm AV. SO.	VEHP	(000)000-0000	6.00
428	ALLWrongs HOME INSPECTIONS	1410 ISLAND DRIVE	CONT	(000)000-0000	25.00
429	Dingdong REALTY/ John Doe	2525 Warm AVE. S. SUITE L	REAL	(000)000-0000	25.00
431	Last Chance YACHTING INC	1609 Warm AVENUE SOUTH SUITE2C	ADMN	(000)000-0000	25.00
432	Dr Doom MD PA	1609 Warm AVENUE SOUTH SUITE2C	PHYS2	(000)000-0000	100.00
433	LAW OFFICE OF John Doe	1135 Warm AVENUE SOUTH # 26	ATTY	(000)000-0000	200.00
434	John Doe MD PA	1609 Warm AVENUE SUITE 2C	PHYS	(000)000-0000	203.00
435	Overboard CRUISES &TOURS	1135 Warm AVENUE # 230	ADMN	(000)000-0000	25.00
436	INK Be US	1135 Warm AVENUE 236	ADMN	(000)000-0000	25.00
437	LAW-by-LAW ENTERPRISES	3517 8TH AVENUE NORTH	ADMN	(000)000-0000	25.00
438	KEN Doe	1375 Warm AVENUE # 304	ADMN	(000)000-0000	25.00
439	Harleydavids and Assoc.	4970 98TH WAY NORTH	ADMN	(727)392-1912	25.00
440	CARLOANS	1150 RUE DES REINES #1A	ADMN	(000)000-0000	25.00
441	JACK MACK	7932 SAILBOAT KEY BLVD 8- 70	ADMN	(000)000-0000	25.00
Total for all listed	15	Licenses			787.00

Business Details

Printed 8/01/01 4:37PM

City of Hotville

Paid License Detail by License Number

Page 1

Included in This Report 426 Thru 429

License: 426 Code: ADMN Phone: (123)555-5555 Emerg: (123)555-5555 Fed. ID: 55-5555555 Issued: 1/19/01 Opened: 1/19/01 Closed: / /	Business: Diddlydata.com, Inc 5555 Warm AVENUE SO. H-I SOUTH Warm, FL 33333 Mailing Address Descrip. ADMINISTRATIVE OFFICE OCCUPATIONAL LICENSE	Owner: DAVID Diddly 5555 PASS-A-GRILLE WAY Hotville, FL. 33333 Phone: (123)555-5555 S.S.# 555-55-5555 Drv. Lic. State: Applicant DAVID Diddly Inventory: 0.00 Term 12 Mo TEST	CITY/CNTY NUMBER Employees 2 Status: A Fees: 28.00 Paid: 28.00 Date Paid 1/19/01
License: 427 Code: VEHP Phone: (000)000-0000 Emerg: (000)000-0000 Fed. ID: Issued: 1/18/01 Opened: / / Closed: / /	Business: Minnesota ORANGE GROVES INC. 1500 Warm AV. SO. Hotville, FL 33333 Mailing 505 17TH AV. N.E. Address Mainville. MN 11111 Descrip. VEHICLE PARKING LOTS/GARAGES OCCUPATIONAL .LICENSE	Owner: VINCENT SHOCKING Phone: (000)000-0000 S.S.# 000-00-0000 Drv. Lic. State: Applicant VINCENT SHOCKING Inventory: 0.00 Term 12 Mo TEST	CITY/CNTY NUMBER Employees 0 Status: A Fees: 6.00 Paid: 6.00 Date Paid 1/18/01
License: 428 Code: CONT Phone: (000)000-0000 Emerg: (000)000-0000 Fed. ID: Issued: 5/18/01 Opened: / / Closed: / /	Business: ALLWrongs HOME INSPECTIONS 1410 ISLAND DRIVE Hotville, FL 33333 Mailing 1410 ISLAND DRIVE Address Hotville, FL 33333 Descrip. HOME INSPECTIONS OCCUPATIONAL LICENSE	Owner: Tammy DoWrong Phone: (000)000-0000 S.S.# 000-00-0000 Drv. Lic. State: Applicant Tammy DoWrong Inventory: 0.00 Term 12 Mo TEST	CITY/CNTY NUMBER Employees 0 Status: A Fees: 25.00 Paid: 25.00 Date Paid 1/18/01
License: 429 Code: REAL Phone: (000)000-0000 Emerg: (000)000-0000 Fed. ID: Issued: 1/02/01 Opened: / / Closed: / /	Business: Dingdong REALTY/ John Doe 2525 Warm AVE. S. SUITE L Hotville, FL 33333 Mailing 2525 Warm AVE. S. SUITE L Address Hotville, FL 33333 Descrip. OCCUPATIONAL LICENSE REAL ESTATE AGENT	Owner: Dingdong REALTY Phone: (000)000-0000 S.S.# 000-00-0000 Drv. Lic. State: Applicant John Doe Inventory: 0.00 Term 12 Mo TEST	CITY/CNTY NUMBER Employees 0 Status: A Fees: 25.00 Paid: 25.00 Date Paid 1/02/01

Business Code List

Run: 8/01/01
4:40PM

Page: 1

City of Hotville
Business Code List

Code	Description	Type	Units	Base Fee	Minimum Fee	Maximum Fee	Licenses
ABST	ABSTRACTS OF TITLE	U	EMPLOYE	0.00	0.00	0.00	0
ACUP	ACUPUNCTURE	U	EMPLOYE	0.00	0.00	0.00	0
ADMN	ADMINISTRATIVE OFFICE	U	EMPLOYE	0.00	0.00	0.00	53
ADVE	ADVERTISING	U	EMPLOYE	0.00	0.00	0.00	2
ALAR	ALARM SYSTEM	U	EMPLOYE	0.00	0.00	0.00	0
AMBU	AMBULANCE SERVICE	U	EMPLOYE	0.00	0.00	0.00	0
AMUP	AMUSEMENT PARKS	U	EMPLOYE	0.00	0.00	0.00	0
AMUS	AMUSEMENT PARLORS	U	EMPLOYE	0.00	0.00	0.00	1
ANIG	ANIMAL GROOMING	U	EMPLOYE	0.00	0.00	0.00	2
ANTI	ANTIQUES (DEALERS IN)	U	EMPLOYE	0.00	0.00	0.00	0
APPR	APPRAISERS	U	EMPLOYE	0.00	0.00	0.00	0
ARCH	ARCHITECT/OFFICE	U	EMPLOYE	0.00	0.00	0.00	0
ARCH2	ARCHITECT, EA ADD'L	U		100.00	0.00	0.00	0
ARMC	ARMORED CAR SERVICE	U	EMPLOYE	0.00	0.00	0.00	0
ARTI	ARTISTS	U	EMPLOYE	0.00	0.00	0.00	1
ATTY	ATTORNEY/OFFICE	U	EMPLOYE	0.00	0.00	0.00	5
ATTY2	ATTORNEY, EA ADD'L PROF	U		100.00	0.00	0.00	7
AUCT	AUCTIONING	U	EMPLOYE	0.00	0.00	0.00	0
AUDI	AUDIO/VISUAL	U	EMPLOYE	0.00	0.00	0.00	0
AUDL	AUDIOLOGY	U	EMPLOYE	0.00	0.00	0.00	0
AVIA	AVIATION	U	EMPLOYE	0.00	0.00	0.00	0
BAND	BANDS/ORCHESTRAS	U	EMPLOYE	0.00	0.00	0.00	1
BARB	BARBERSHOPS	U	EMPLOYE	0.00	0.00	0.00	4

NAIC Code List

NAIC Code	Description
01	Agricultural Production--Crops
011	Cash Grains
0111	Wheat
0112	Rice
0115	Corn
0116	Soybeans
0119	Cash grains, nec
013	Field Crops, except Cash Grains
0131	Cotton
0132	Tobacco
0133	Sugarcane and sugar beets
0134	Irish potatoes
0139	Field crops, except cash grains, nec
016	Vegetables and Melons
0161	Vegetables and melons
017	Fruits and Tree Nuts
0171	Berry crops

Receipts Report

Printed: 8/02/01 2:07PM

City of Hotville
Occupational Licenses Receipts Report
Receipt Date Range: 8/02/99 Thru 8/02/01
License Number Range: 426 Thru 5768

Page: 1

Date	**License**	**Business Name**			**Amount**
6/27/01	426	Diddlydata.com, Inc			0.0(
	LICENSE	PENALTY	TRANSFER	BASE	
	0.00	0.00	0.00	0.00	
1/19/01	426				28.0(
	LICENSE	PENALTY	TRANSFER	BASE	
	28.00	0.00	0.00	0.00	
1/18/01	427				6.0(
	LICENSE	PENALTY	TRANSFER	BASE	
	6.00	0.00	0.00	0.00	
1/18/01	428	ALBRIGHT'S HOME INSPECTIONS			25.0(
	LICENSE	PENALTY	TRANSFER	BASE	
	25.00	0.00	0.00	0.00	
1/02/01	429	DOPHIN REALTY/ STEVE D. HUME			25.0(
	LICENSE	PENALTY	TRANSFER	BASE	
	25.00	0.00	0.00	0.00	
12/28/00	430	GEORGE ELLINGHAM			25.0(
	LICENSE	PENALTY	TRANSFER	BASE	
	25.00	0.00	0.00	0.00	
12/26/00	431	LAUDERDALE YACHTING INC			25.0(
	LICENSE	PENALTY	TRANSFER	BASE	

Default Values

	File Name	Horizontal	Vertical	Width	Height
	---------	----------	--------	-----	-----
Logos	logo.bmp	3.000	0.500	2.198	2.198
Years	year.bmp	5.740	0.500	1.800	1.800
Signatures	sign.bmp	5.583	2.323	2.400	0.600

Glossary

Amount Exempt This field in the penalty schedule is the dollar amount portion of the amount owed which will be exempt from penalty calculation.

Applicant The name of the person applying for the occupational license, to a maximum of 30 characters

Apply Date The purpose of this field is to allow payments for license renewals in the old fiscal year that are not to be applied until the new fiscal year for which the license will be issued. If this option is enabled, receipts reports may be printed based on either the date received or the date applied.

Base Fee This field on the General Tab of the Business Code data is the amount of license fee that will be charged regardless of the amount of inventory or units. Any fee calculated from the fee table will be added to this base fee.

Base Penalty This is equal to the Penalty Percent times the qualifying amount owed (amount owed less amount exempt).

Bus. Name See **Business Name**.

Business Address This is the address that the business is located at and is also known as the **Street Address**. (See **Street Address** Below)

Business Code This is a six character field which references a record in the business code file which contains a description of the type of business and the fee structure. It is shown in a field within the license record on the Fees Tab.

Business Description

See **Description 1** and **Description 2**.

Business Name

This is the name of the business, to a maximum of 40 characters. A license may be located by the business name.

Business Phone Number

The area code and phone number of the business.

City, State, Zip

The city, state, and zip code of the physical location of the business (or the owner, when displayed in the owner information). The default which appears is entered in /File/System Setup and Utilities/Titles, and may be up to 40 characters long.

General Buttons

Apply Button
Apply the change immediately.

Change Button
Change the access level for the highlighted item.

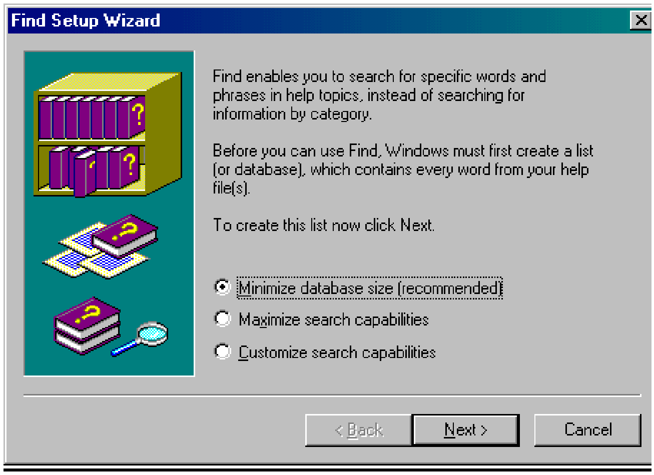
Change All Button
Change the access level for all items.

Close Button
Close this window.

Delete Button
Delete selected entry.

Edit Button
View or change selected entry.

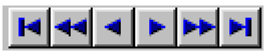
Help Button
For additional help press this button. You will be taken to the Find Setup Wizard



Insert Button
Add a component to this asset.

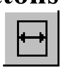
OK Button
Save changes and close window.

Quit Button
Abandon changes and close window.

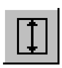


VCR Buttons
You may use these buttons to go through records like the buttons on a VCR.

Print Preview Buttons

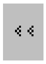


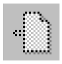
This button allows you to change the report so it uses the full available page width.

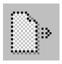


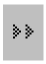
This button allows you to change the report so it uses the full available page height.

This box shows you what current percentage of full size the report is displayed in. You may enter a new percentage to change the size, or click on the down arrow to choose 25, 50, 75, or 100 percent.

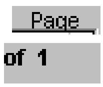

This button takes you to the first page of the report.


This button takes you to the previous page of the report.


This button takes you to the next page of the report.


This button takes you to the last page of the report.


This prints the current page only.

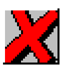


This box allows you to move to any page of the report. You may enter the desired page number, or use the up and down arrows to change the page number (the current page number is displayed.)

This box allows you to choose which pages to print. You may choose All, or enter ranges of pages such as 4-5,8,10-12,15.


This button sends the report as is to the printer.

This box allows you to print any number of copies you wish. You may enter the desired number, or use the up and down arrows to change the number of copies.


This closes the report preview window without printing.

Comment This is a field within the license record containing up to 40 characters which may be used for any notes relating to the business.

Date Closed The date the business was closed. This field is usually blank.

Date Issued This field within the license record shows the date the license was issued. Pressing F3 within this field will display a calendar.

Date Opened The date the business was opened. Pressing F3 within this field will display a calendar.

Date Paid This field within the license record shows the date of the last payment made.

Description This is a 20-character field within the Custom Reports function that is used to describe a particular custom report. A report may be located by its description

Description 1 One of two fields (also Description 2) in the master file, general license information. It will hold up to 40 characters and can be used to describe the business. The default is the description found in the business code data, dependent upon which business code a license is assigned. This will fill in when you select a business code for the license and can be changed by the user.

Description 2 See **Description 1**.

Digits This field within the business code based on inventory fee table appears only if rounding is enabled (or not disabled). The entry in this field tells the program at what level to round. Valid entries are numbers from zero (which is the same as no rounding), to 9. For example, if digits is set to 2, inventory value will be rounded up or down to the next $100. If digits is set to 3, the steps are $1000, etc.

Disabled This field within the business code based on inventory fee table, if selected, means that no inventory rounding will take place. License fees for this business code will be calculated from the actual value of inventory.

Driver's License The driver's license number of the business owner, if an individual.

Emergency Phone Number The area code and phone number where the owner (or other officer of the company) can be reached in case of an emergency (i.e. a fire).

Federal ID The employer Tax Identification Number of the business, usually a number such as 59-xxxxxxxx or 60-xxxxxxxx.

Fee Amount Within the license record on the Fees Tab this field appears for each of the active fee types.

Fee Paid On the Fees Tab within the license record this field showing the amount of the fee paid appears for each of the active fee types.

Flat Amount This field on the Inventory Fee Table is the fee amount to be charged if the rounded inventory value falls between the "From" and "To" values of this level.

Font Size This field on the Label Formats screen is the font size that will be used to print labels, in points. Be sure to select a font that will allow the full line widths to fit on the labels. Also, be sure you pick a font size that your computer can produce.

From This field on the Inventory Fee Table is filled in automatically. It is $0 for the first level of the table, and for all subsequent levels is the "To" value from the previous level plus $1.

Inactive This box in the license record, when checked, will cause the record to not be processed, nor listed in reports or browse listings. No fees or penalties will be computed, and receipts cannot be entered for an inactive license.

The only place inactive licenses will appear is in the main Browse the License File screen, where they will be displayed in gray.

Unchecking the inactive box will restore the license to the active condition, but will not perform any processing that may have been performed on all other licenses while it was set to inactive.

Inventory This is the dollar value of the business' inventory. This field is needed only if the fee schedule is based on inventory.

Label Height This field on the Label Formats screen contains the height of a single label. The relationship between this number and the page height determines how many rows of labels will be printed on a page. For example, a label height of 1.0 will fit into a page height of 10.0 ten times; thus, the labels will print ten rows to a page. This field is in inches.

Label Type This field on the Label Formats screen contains a descriptive name used to identify a mailing label format.

Label Width This field on the Label Formats screen contains the width of the label. The relationship between this number and the page width determines how many labels will be printed across. For example, a label width of 3.60 will fit in a page width of 7.50 two times, but not three times; thus, the labels will print two across. This field is in inches.

Left Margin This field on the Label Formats screen is the horizontal margin from the left side of the page in inches.

License File This is a collection of all the license information about all the individual businesses.

License Number This is the unique number that identifies a licensed business. It is automatically assigned when a license is entered, but may be changed. The valid number range is 1 to 9999999. A license may be located by its license number.

License Term This is the number of months for which a license is valid, and is usually 12 months. If fees are calculated by business code and prorating is enabled, entering a value other than 12 in this field will cause the license fee to be automatically prorated.

Lower This field within the business code based on inventory fee table, if selected, means that inventory value will be rounded down to the next level.

Mail City The second line of the mailing address of the business. It should contain the city, state, and zip code to which correspondence for the business should be sent and may contain up to 40 characters.

Mail Street The first line of the mailing address for the business. It will usually contain a street address or post office box number, and may be up to 40 characters long.

Maximum Fee This field within the Business Code data is the maximum fee amount charged regardless of what is determined by the base fee and fee table.

Maximum Penalty Fee This field within the Penalty Schedule shows the not-to-exceed amount, regardless of the penalty calculated.

Minimum Amount Owed This field on the Penalty Schedule is the amount which must be owed before a penalty will be calculated. The default is $0.

Minimum Fee This field within the Business Code data is the minimum fee amount charged regardless of what is determined by the fee table.

Minimum Penalty Fee This field in the Penalty Schedule says that the penalty fee will be at least this amount if a penalty is calculated.

NAIC Code North American Industry Classification code.

Name The name of the business owner. If this is an individual, the name should be entered in the last name, first name format for proper sorting. A license may be located by the owner's name. The field will hold 30 characters.

Nearest This field within the business code based on inventory fee table, if selected, means that inventory will be rounded up or down, depending on which is nearest to the actual inventory value.

Notes This field holds miscellaneous text. The capacity of the field is 1000 characters

Page Height This field on the Label Formats screen refers to the height of the label page. This field is in inches.

Page Width This field on the Label Formats screen refers to the width of the label page. This field is in inches.

Penalty Percent This field on the Penalty Schedule is that percentage of the qualifying amount owed (amount owed less amount exempt) which will be the base penalty, such as 10%, 15%, 20% and 25%.

Percent This field on the Inventory Fee Table is the percentage of the rounded inventory value which will be added to the amount in the Flat Amount field to produce the total fee amount from the fee table. This is in addition to the base fee, if any, and is subject to the maximum and minimum limits entered on the General Tab.

Phone The area code and phone number of the business owner.

Report Name This 20-character field is within the Custom Reports function and is the title given to a custom report.

Reversing Receipt A receipt entered to counterbalance another receipt for the same amount, but negative, so that the total is 0.

Social Security The social security number of the business owner, if an individual.

State In the owner information portion of the license record, the two-letter abbreviation of the state issuing the driver's license.

Status This is a user-defined field within the license record. It will hold up to 6 characters and may be used for anything.

Street Address Also known as the Business Address, this is the physical location of the business. It is divided into three components: Street Number (7 characters), Street Name (25 characters), and Suite Number (8 characters). When sorted by address, licenses appear alphabetically by street name, then numerically by street number, and then numerically by suite number.

The **Street Address** field is also found in the owner information portion of the license record. In that use it is a single 30 character field, and is not divided into components. A license may be located by its business street address.

To This field on the Inventory Fee Table is the cutoff value for the current level of the table. At the highest level of the table pressing the End Key will set the value to $99,999,999,999 and erase all subsequent levels.

Top Margin This field on the Label Formats screen is the vertical margin from the top of the page in inches.

TXR File This file contains one or more custom reports. All are shown in /Print/Custom Reports/Run Report.

Type See **Fee Type**.

Units For those business code fee schedules based on units, this field in the license record should contain the number of units. In a report, this heading shows the type of unit (chairs, rooms, etc.).

Upper This field within the business code based on inventory fee table, if selected, means that inventory value will be rounded up to the next level.

User-Defined Fields This is a set of up to 4 fields which are defined through **File, System Setup and Utilities, Titles**. The first three fields may be either alphanumeric fields (up to 8 characters) or date fields. The fourth field is an alphanumeric field of up to 30 characters

When you are viewing this document in Word, the Index is hyperlinked to the items listed.

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