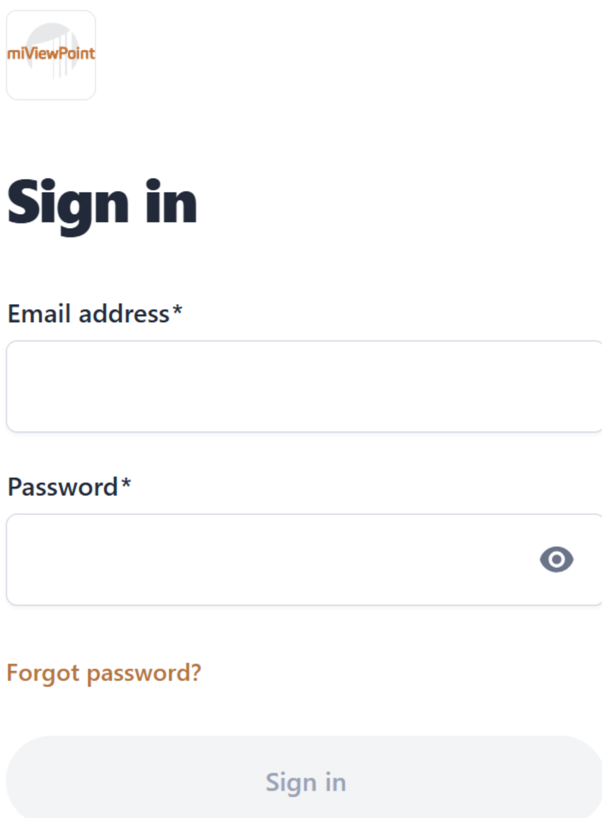
miViewpoint- Basic

CASELLE®

Log in

Logging On

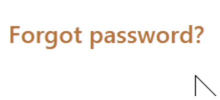
1. Go to the site address provided by the welcome email or by your site administrator.
2. Enter your email address in the Email field.
3. Enter your password in the Password field.
4. Click Log in.

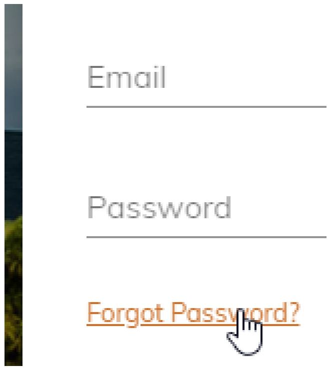


Resetting Your Password

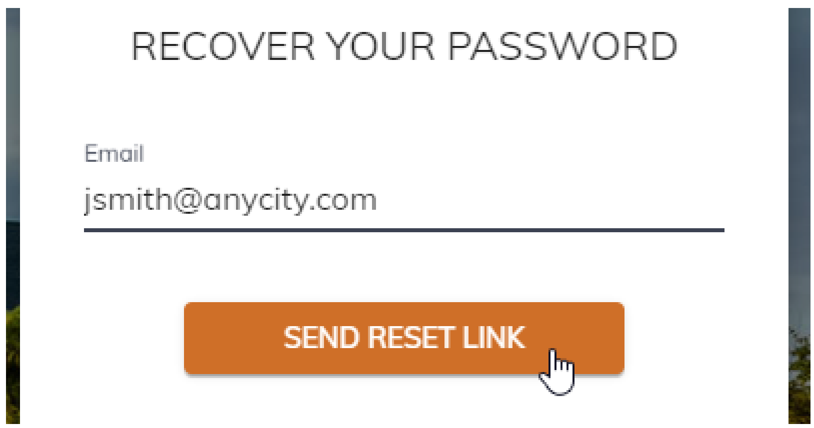
If you have forgotten your password or wish to change it, follow these steps to reset it:

1. Go to your miViewpoint site.
2. Click on Forgot Password? on the log in page.





3. Enter your email and click Send Reset Link.

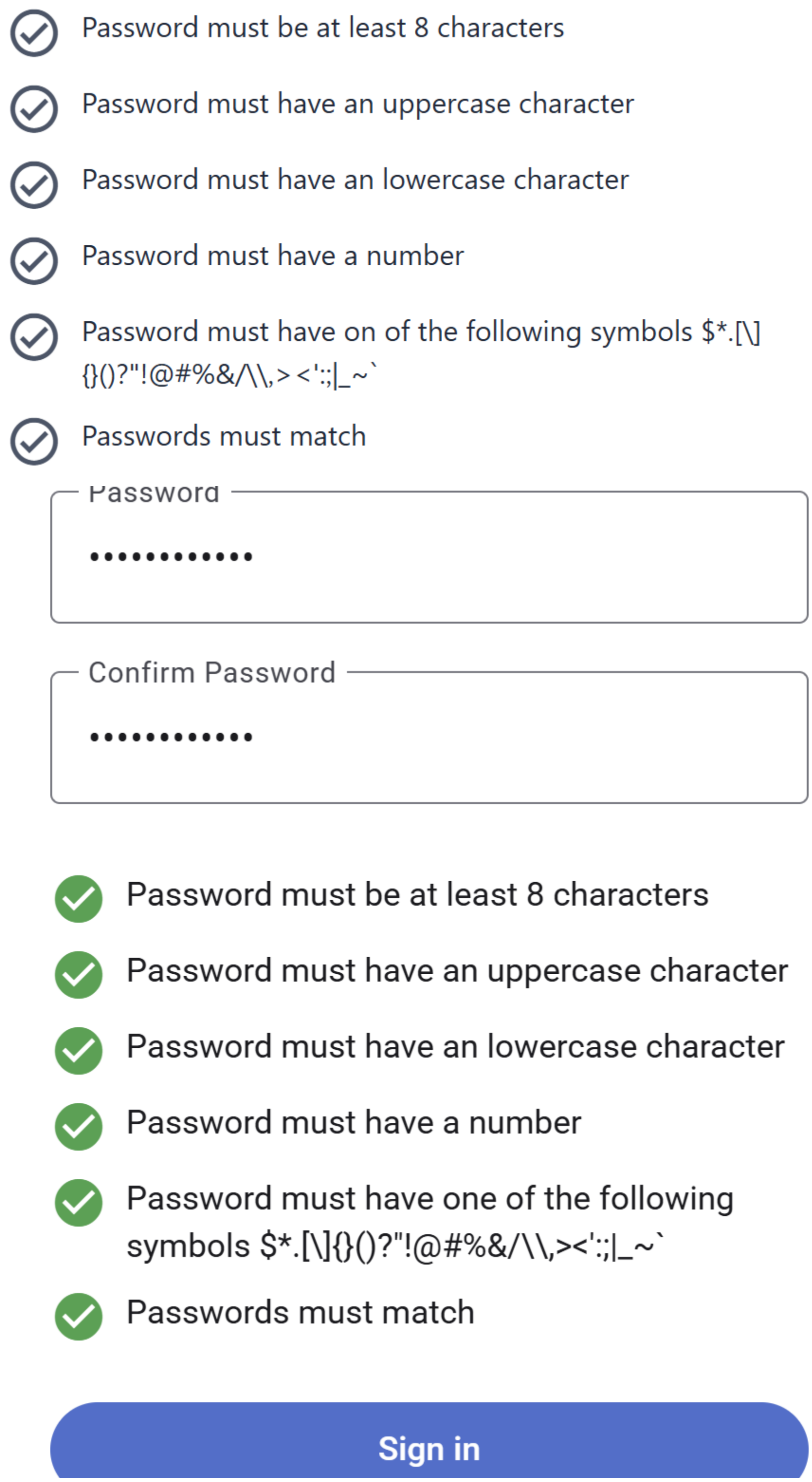


4. Click on the link in the Password Reset Email.

As requested you can click below to reset your portal account password

Click here to reset your password

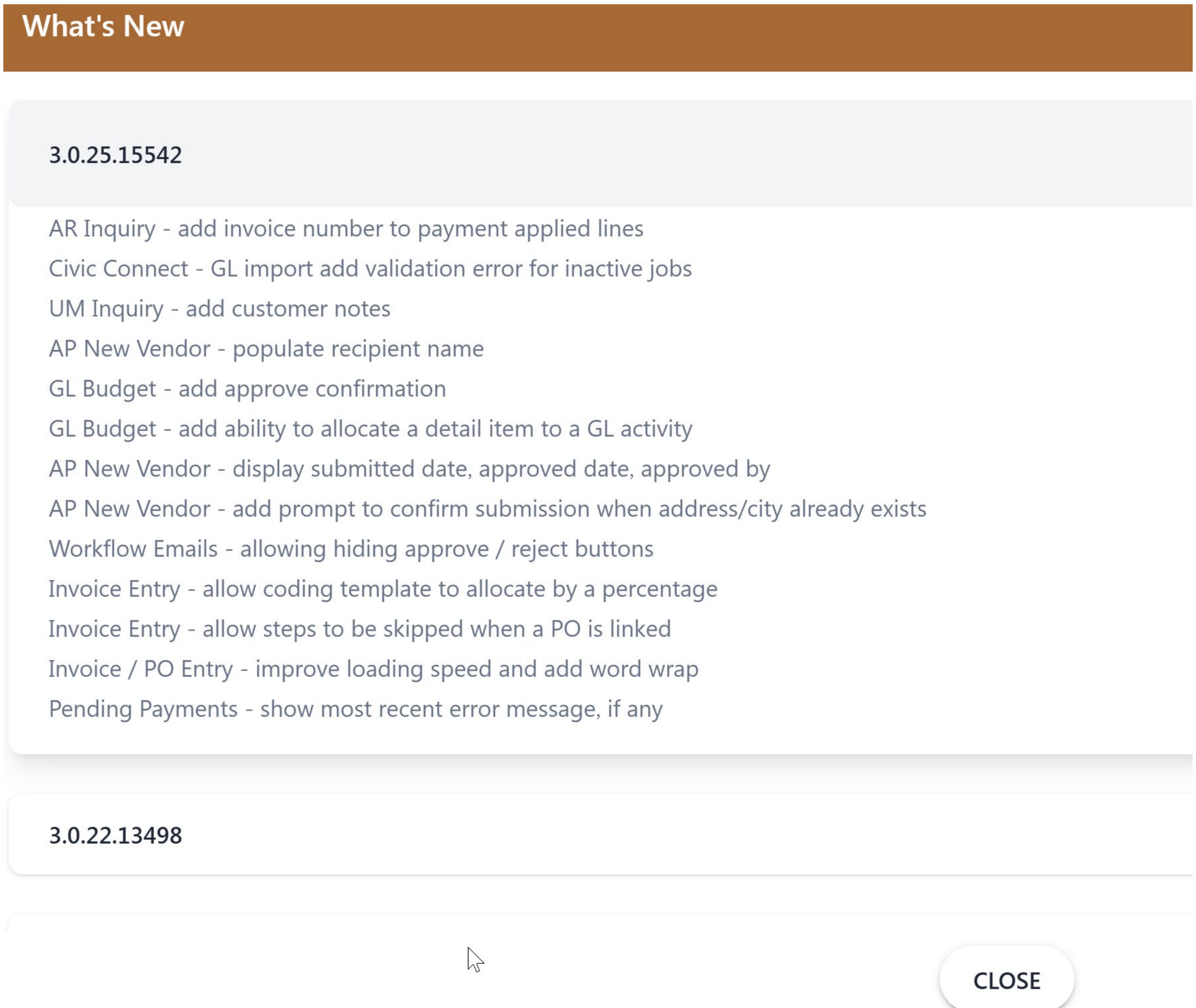
5. Enter a password in the Password field and confirm your password in the Confirm password field. Below are the password requirements.



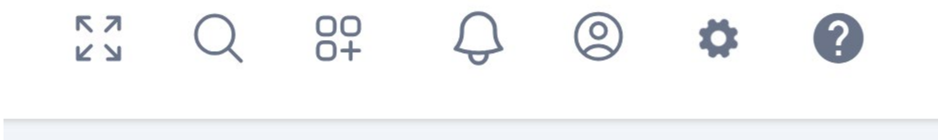
6. Click the Sign In button to save.

What's New

You may receive a What's New pop-up message at login. This pop-up appears if there has been a new release installed since your last login. The What's New will list all the changes and enhancements on this latest release. Review the list and click Close when finished. This list can be accessed at any time by clicking the version number at the bottom of the menu on the left.



Display and Navigation Settings

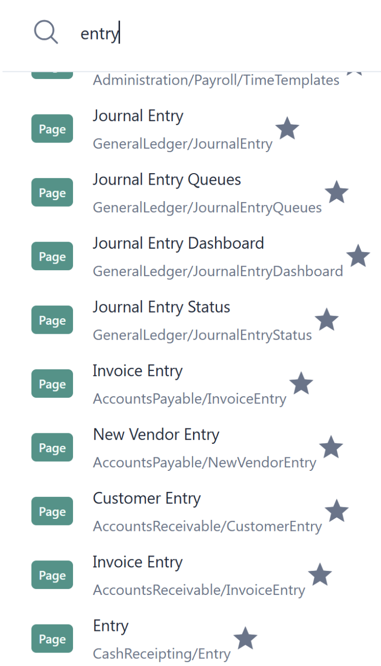


Toggle Fullscreen-

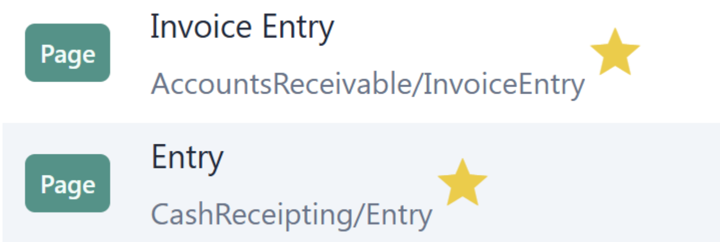
This icon allows your miViewpoint screen to expand to full screen. To enter/exit full screen mode, simply click the icon.

Adding Shortcuts-

To add items as a miViewpoint Shortcut, simply click the search icon and type in your desired shortcut. For example, let's say I most often use miViewpoint for entering invoices or entering cash receipts. I can search Entry and click the Star next to those items to add them to my favorites.

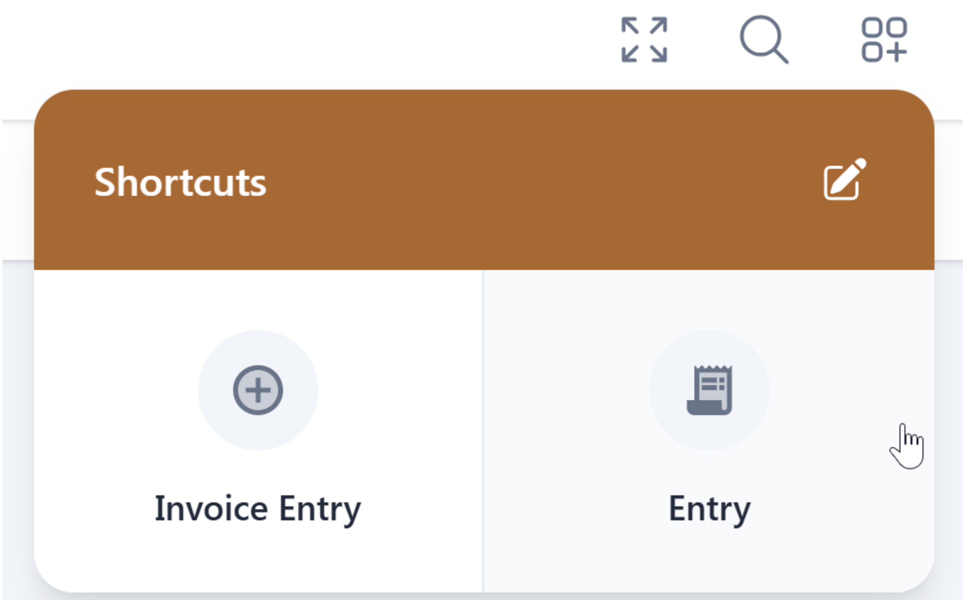


When you click the star, that star becomes yellow symbolizing that this has been added as a shortcut.



Accessing Shortcuts-

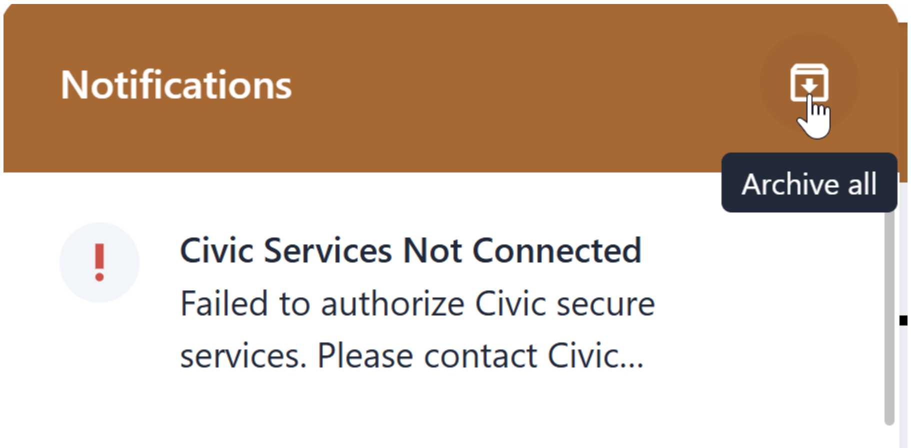
Click the above icon to access your saved shortcuts in miViewpoint.



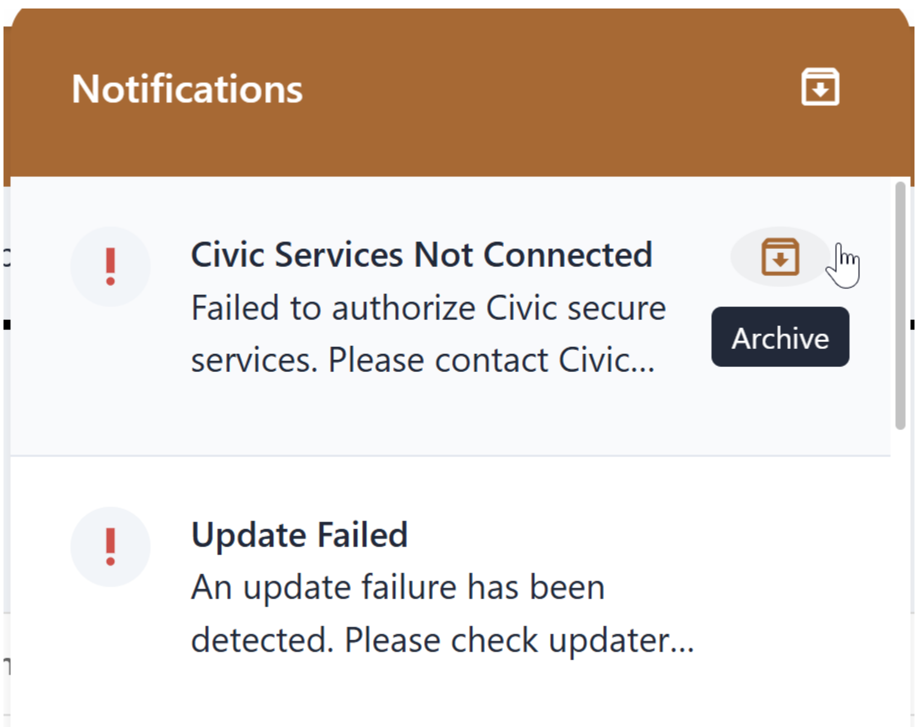
To access a shortcut, simply click on that selection from your Shortcuts and you will be taken to that screen in miViewpoint.

Notifications

The bell icon will display any notifications. After you have viewed any notifications, if you wish to clear them you can click Archive All to remove all existing notifications from your view.

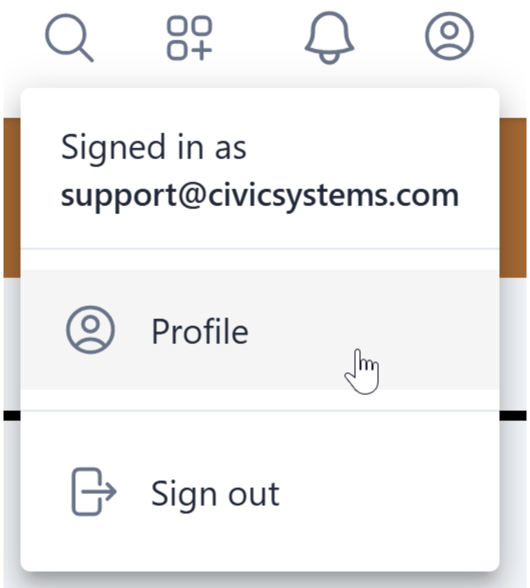


You can also choose to just archive one or more notifications by hovering over that notification and clicking Archive.



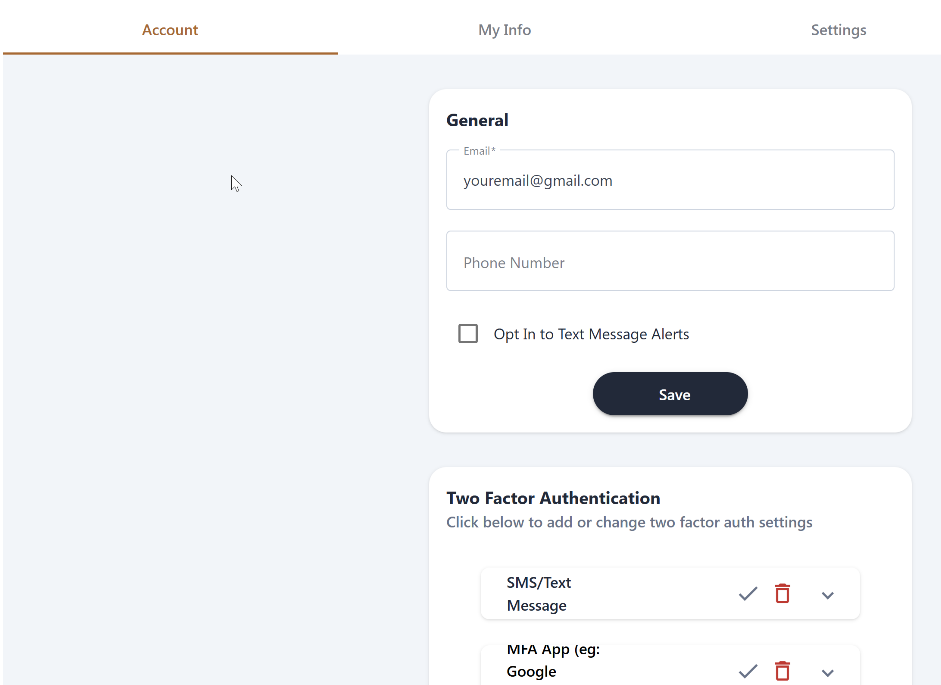
Profile

Click the above icon to log out of miViewpoint or to view your Profile.



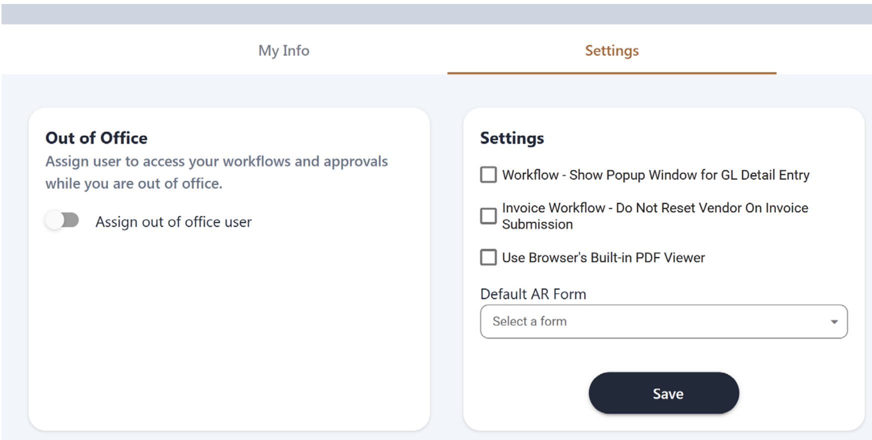
Profile- Account

Here you can see/modify your email address you use to log into miViewpoint. You can choose to add a phone number and to opt in to receive text message alerts. This is also where you can set up/modify two factor authentication.



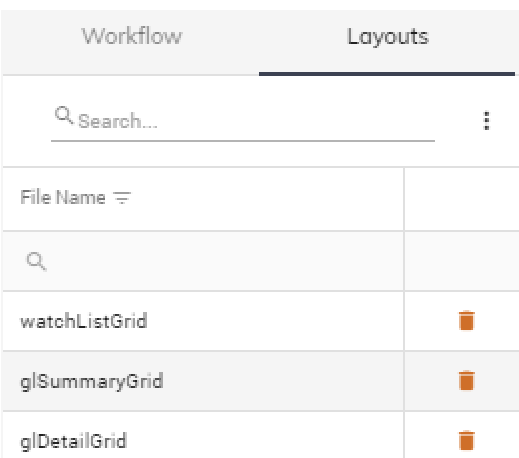
Profile- Settings

If you are going to be out of the office, you can assign an out of office user to take on your workflow/approval steps until you return. You can also change certain workflow settings on this screen. More details on workflows would be covered in a separate manual.



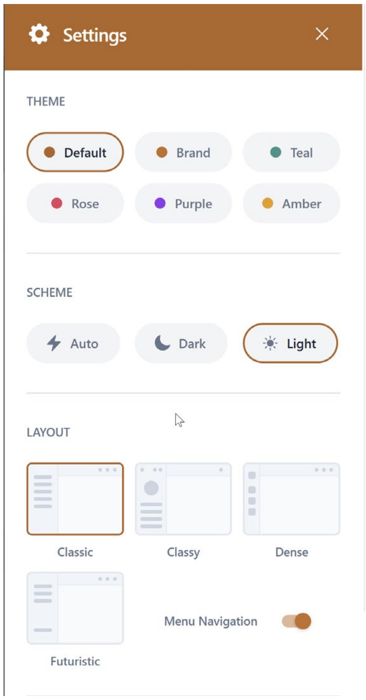
Profile- Layouts

This tab provides the ability to remove filtered settings within your profile. You can do this by clicking on the trash can across the grid name. This only removes filters from the screen, and deleting layout filters will not delete your data. This is a helpful took if you feel that you are not seeing all data on a screen you are viewing.



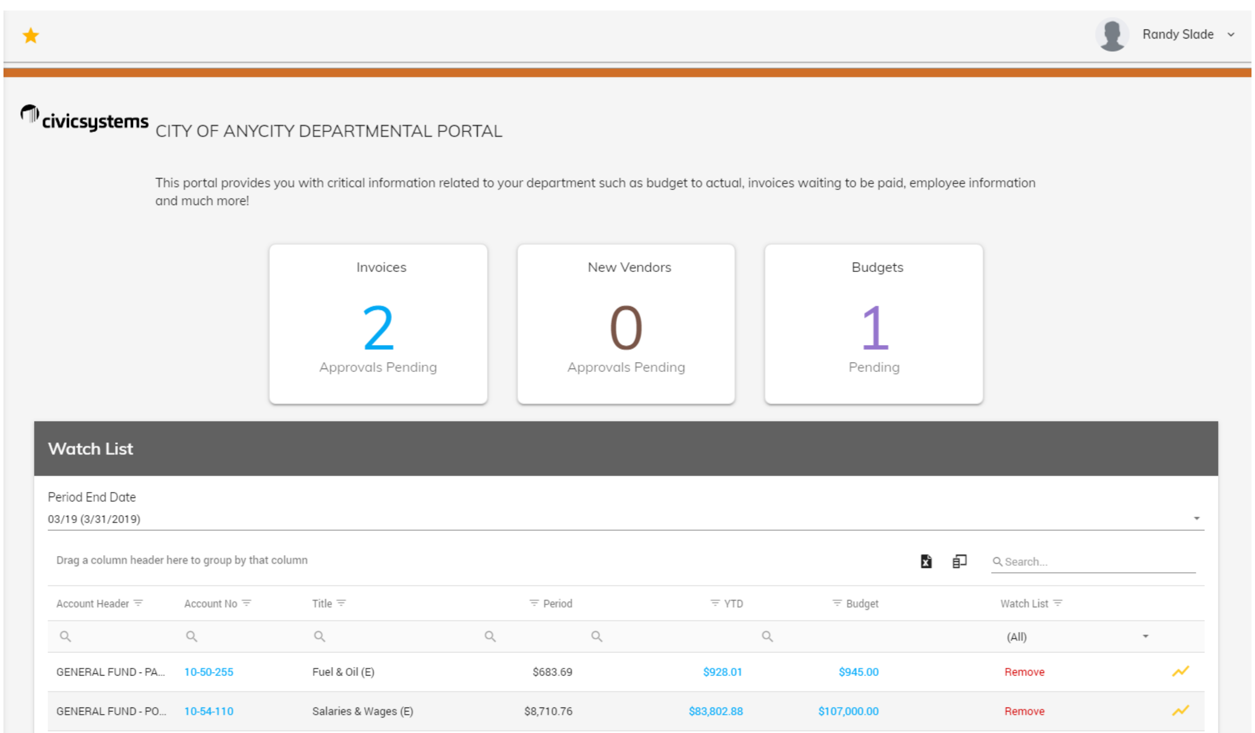
Settings

On the Settings screen, you can change your display settings such as color themes and page layouts.



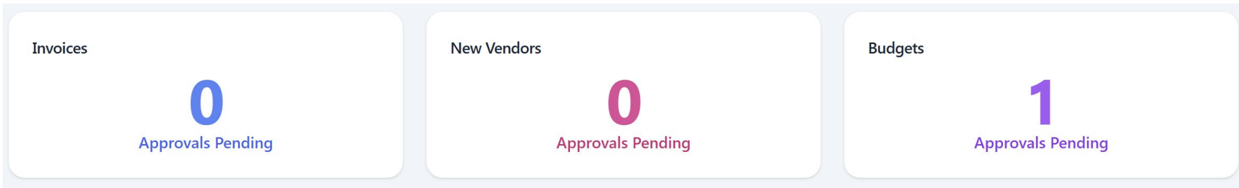
Home Screen

After logging in, you will land on the Home page. The Home page communicates items in your queue awaiting your approval and shows any accounts in your Watch List.



Approval Queues

The **Home** page will show any items needing your attention in tiles at the top. The tiles displayed depend upon what workflows have been implemented by your organization.

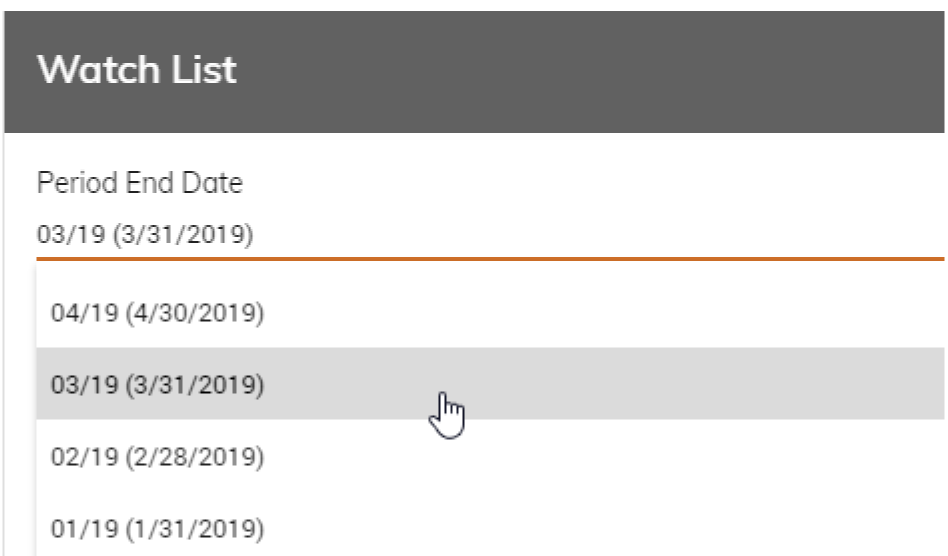


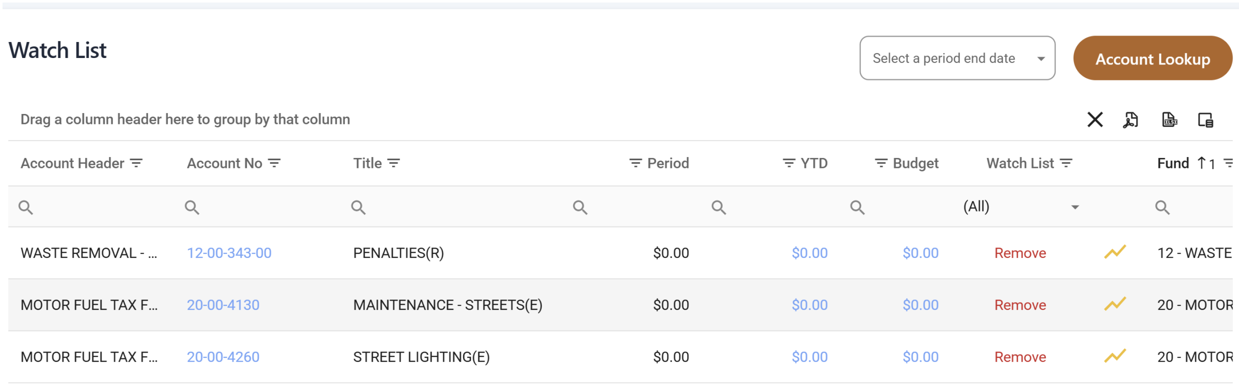
Watch List

The Watch List allows you to monitor the balances and activity of accounts you determine are a priority. The following lists the capabilities of the Watch List.

Period End Date

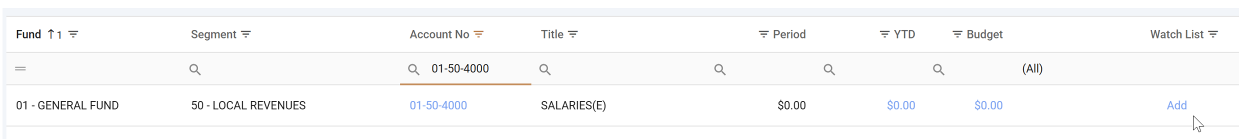
You can change the period end date to any date in the past or future by clicking on the Period End Date drop-down field. The columns in the Watch List will update automatically when the date is changed. The Watch List will always default to the current month unless a different month is selected from the Period End Date drop-down.



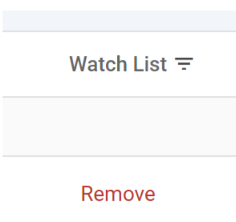


Adding an Account to Watch List

Navigate to General Ledger | Account Lookup. Search for an account you would like to add and click 'ADD' under the Watch List column.



If an account if on your Watch List it will only have the Remove option under Watch List column. To remove an account from your Watch List, click Remove.



Export All Data

You have the ability to export the data in the Watch List to Excel. Simply, click the Export button found on the right side of the screen. Depending upon what browser you are using, you may have a couple more steps to follow to export the data into Excel.

Column Chooser

You can customize the Watch List by adding or removing columns from the Watch List. Simply, click the Column Chooser button found on the right side of the screen. A pop-up will appear providing you with a list of additional columns that can be added to the grid. Add a column by clicking and dragging it into the appropriate place in the Watch List grid. Alternatively, you can remove a column by clicking and dragging the column from the grid back into the Column Chooser list.

<u>The following are the columns available and a brief description of each:</u>

Account Header – This is the group the account belongs to. Normally, the group is the Fund and Department name.
Account No – This is the formatted account number. You will notice that the account number is hyperlinked. Clicking on the Account No will show account and budget notes related to the account number.
Title – This is the title given to the account within the General Ledger. The letter shown in parenthesis behind the title identifies the account type: A = Asset, L= Liability, Q=Equity, R=Revenue, E=Expenditure.
Period – This amount represents the dollar amount of activity in the account for the selected month/period.
YTD – This amount represents the year-to-date balance of the account as of the selected month/period. This amount is hyperlinked. Clicking on the YTD amount will allow you to see all transactions that have been recorded to that account number through the month/period selected.
Budget – This amount represents the budget amount for the account as of the selected month/period. This amount is hyperlinked. Clicking on the Budget amount will allow you to see all budget transactions that have been recorded to that account number.
Watch List – This column gives you the ability to remove the account from the Watch List on the Home page. You can still view this account in your Account List, but it will no longer be shown on your Home page.

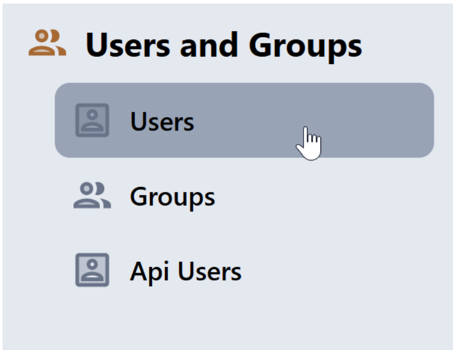
Graph – This will give you the ability to see four years' worth of history (budget and actual) in a trend graph.
AccountID – This is the reference number of the account behind the scenes in the software.
Account No – This is the unformatted account number. This will have the same number as the default Account No in the grid but it will not contain any dashes or periods that format your account numbers.
Account Type – This will show the type of account: Asset, Liability, Equity, Revenue, or Expenditure.
PY1 – This amount represents the prior end-of-year balance. This amount is hyperlinked. Clicking on the PY1 amount will allow you to see all transactions that have been recorded to that account number for the prior year.
PY1YTD – This amount represents the prior year-to-date balance as of the selected month/period. This amount is hyperlinked. Clicking on the PY1YTD will allow you to see all transactions that have been recorded to that account number for the prior year through the month/period selected.
Budget Variance – This amount represents how much is left to spend or earn for the account. The variance is the difference between the year-to-date balance and the budget amount.
PY Variance – This amount represents how much is left to spend or earn from the prior year. The variance is the difference between the prior year-to-date balance and the prior year budget amount.

% Budget Variance – This amount represents the percent variance of the account. The percentage is derived by dividing the budget variance into the year-to-date balance.
% Budget Spent – This amount represents the percent of budget spent through the month/period selected. The percentage is derived by dividing the year-to-date balance by the budget amount.
% Budget Spent Chart – This chart will reflect the percent of the budget spent in a horizontal bar chart. Green means that less than 70% of the budget has been spent. Yellow means that between 70% and 100% of the budget has been spent. Red means that over 100% of the budget has been spent.
% PY Variance – This chart represents the prior year percent variance of the account. The percentage is derived by dividing the prior year budget variance into the prior year-to-date balance.
Encumbrance – This number represents the amount of open purchase orders related to this account as of the period selected.

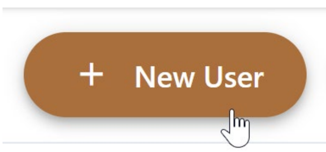
Users/Groups

Adding user

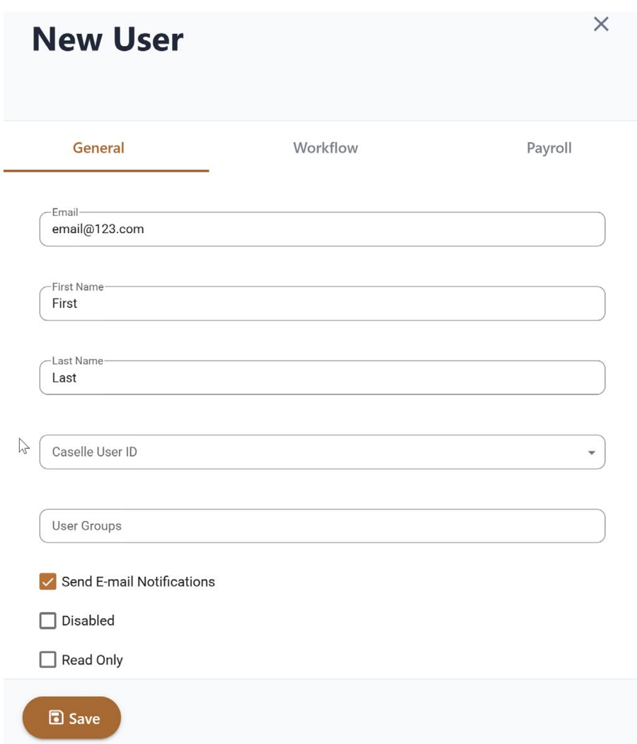
To add a user, go to Administration > Users.



Select New User.



Enter the email address, first name, last name, and caselle user (if applicable). Caselle User is only required for certain tasks, so this can be left blank.



We recommend checking Send Email Notifications.

If you know the user group this new user should be in, you can add that miViewpoint User Group also.

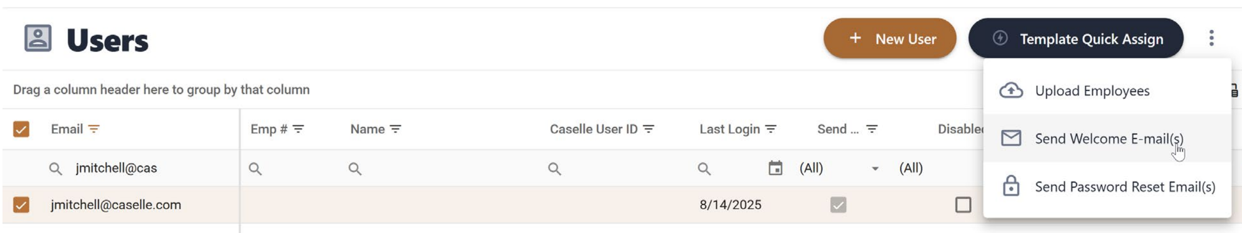
Click ‘Save’

Welcome Email

After you add a user, you must send them a welcome email so they can set up their password and verify their email address. The email will originate from noreply@miviewpoint.net. It will contain a link to click on so that the user can confirm their email address and set their initial password.

Sending Welcome Email

After adding a user in Administration > Users, select the checkbox next to the user/s you wish to send a Welcome Email to. Select the 3 dots and click Send Welcome Email.

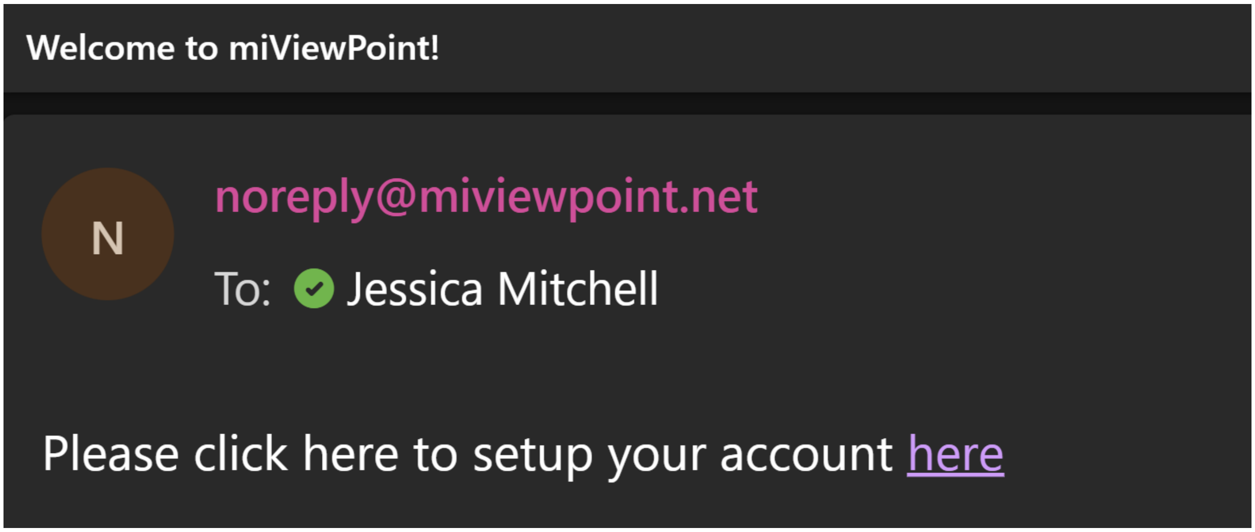


- **<u>Please note</u>**: The links in the Welcome Email expire after 3 days. If someone does not complete the link before it expires, you can simply resend another Welcome Email the same way as before.

Completing Welcome Email

To confirm your email address and set your password follow these steps:

1. Open the **Welcome Email** sent to you from noreply@miviewpoint.net and click on the link.

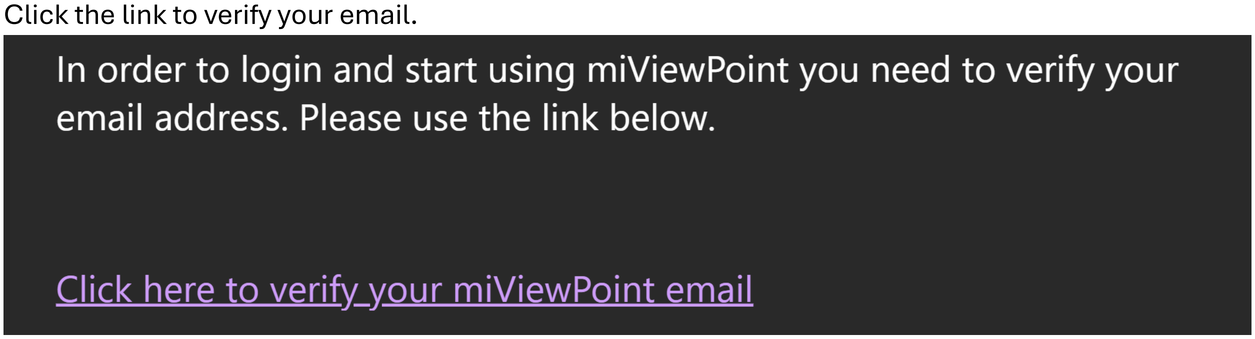


Please Note: Bookmark this website so you can log in later.

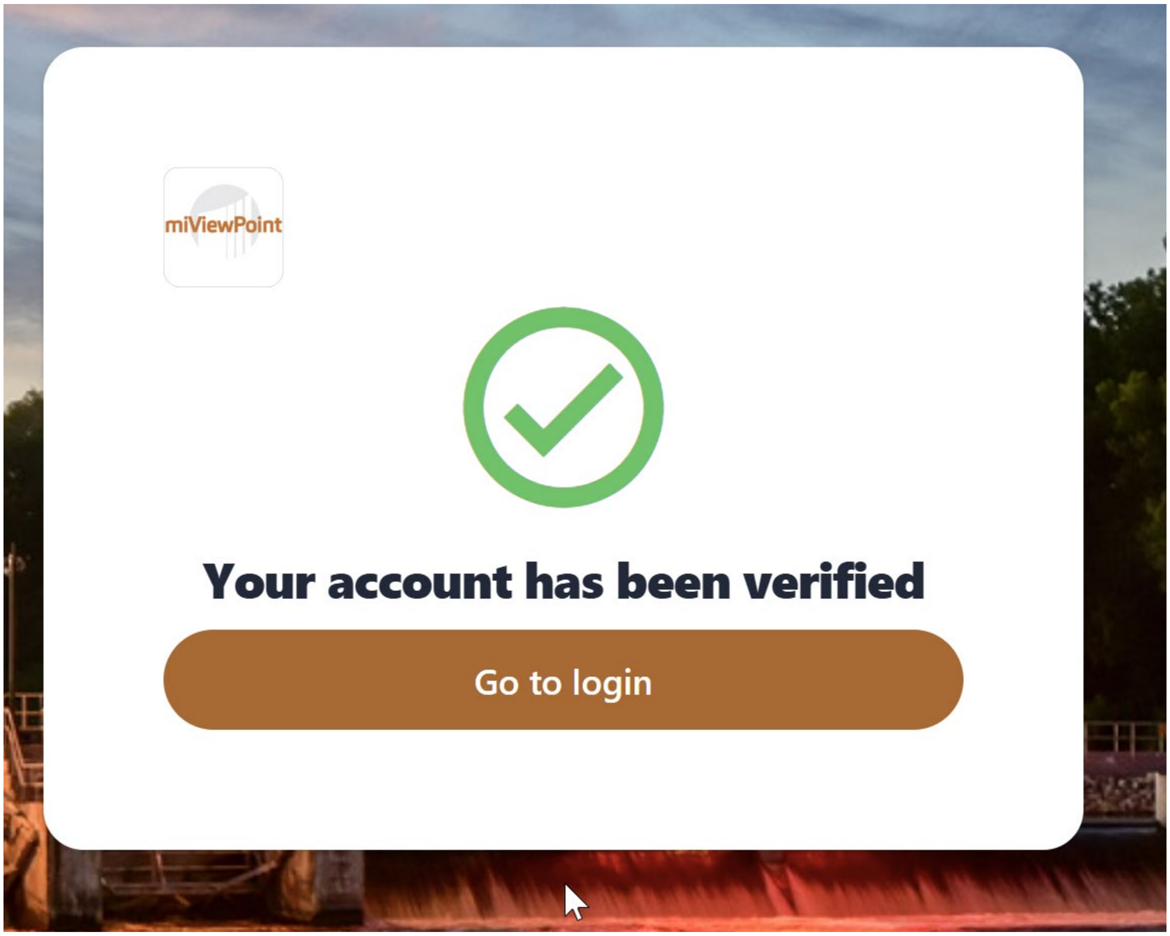
2. Enter your email address and password in the **Password** field and confirm your password in the **Confirm password** field. Below are the password requirements.

- Password must be at least 8 characters
- Password must have an uppercase character
- Password must have an lowercase character
- Password must have a number
- Password must have on of the following symbols $*.[\]{}()?"!@#%&/\\,><':;|_~`
- Passwords must match

3. Click **Sign In**.
4. You will receive an additional email asking you to verify your email address. Click the link to verify your email.



5. Your account has been verified!



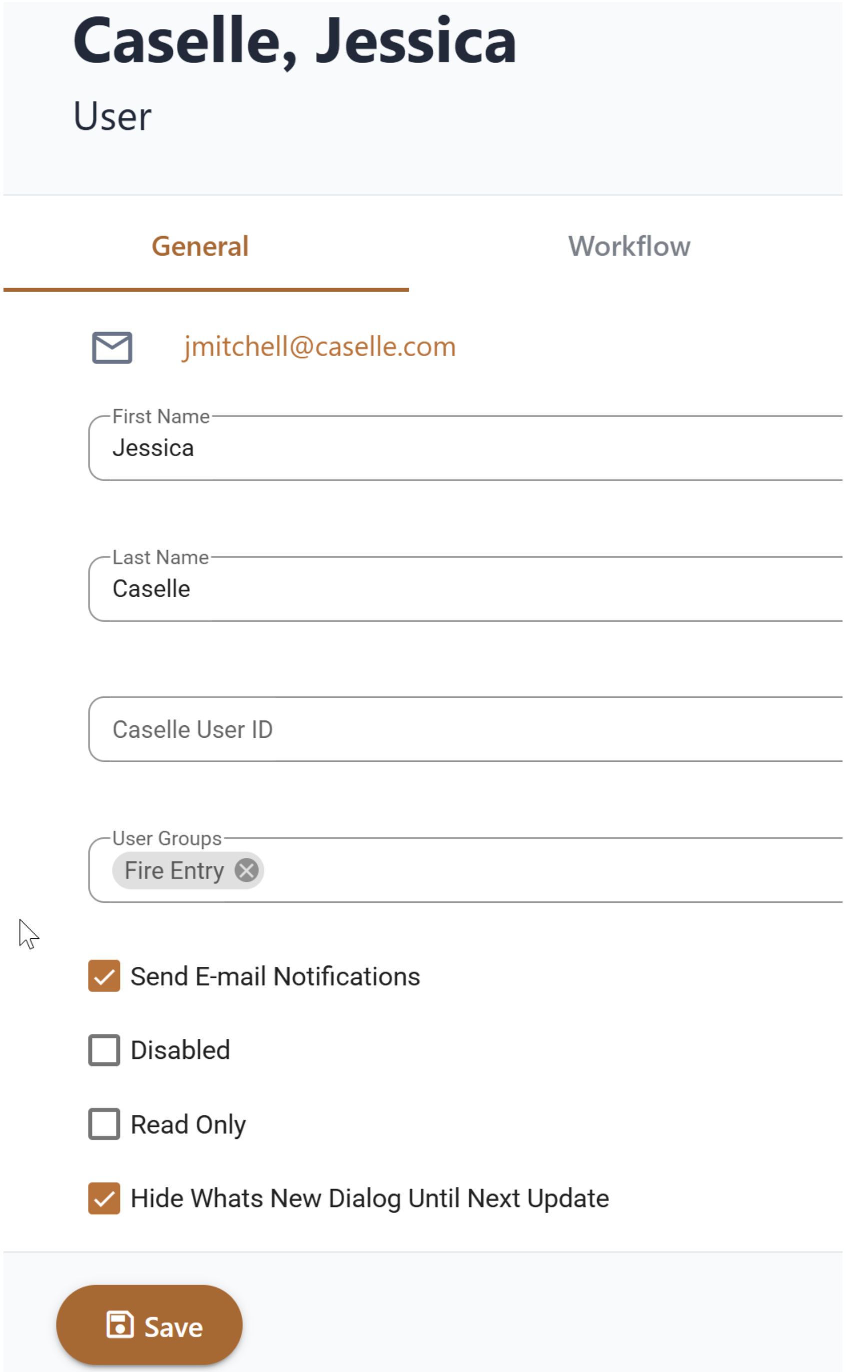
6. You can now log into miViewpoint.

Groups

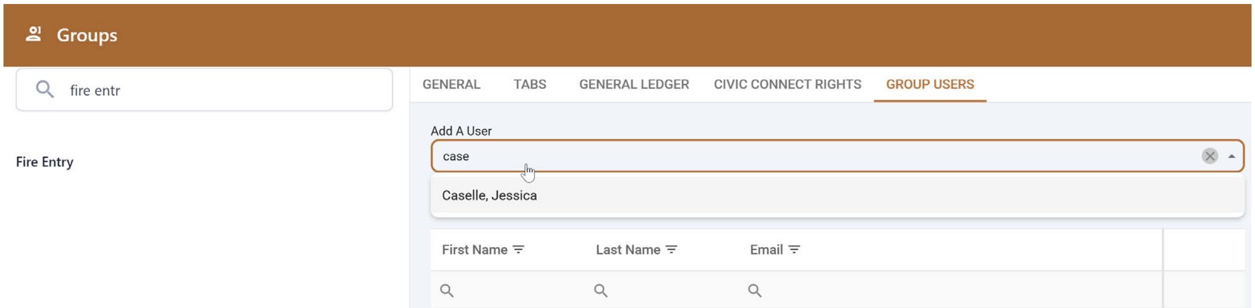
Adding a user to a group

In miViewpoint, permissions are determined by the group/s they are in.

To add a user to a group, you can navigate to Administration | Users, select the user, add a User Group and click Save.



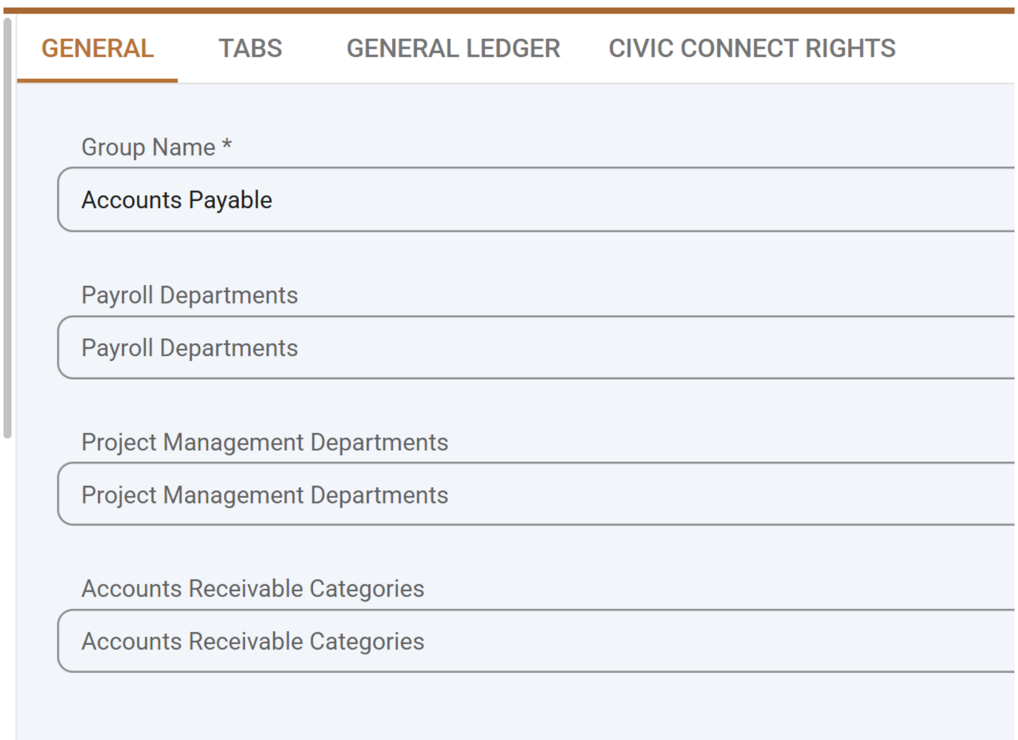
You can also add a user to a group under the Groups screen. Go to Administration | Groups, select the group you would like the user to be in. Click the Group Users tab. Type in the name of the user you want to add. Select them from the dropdown. Remember to click Save to apply your changes.



Creating a Group

Go to Administration | Groups. Select Add New from the bottom of the screen.

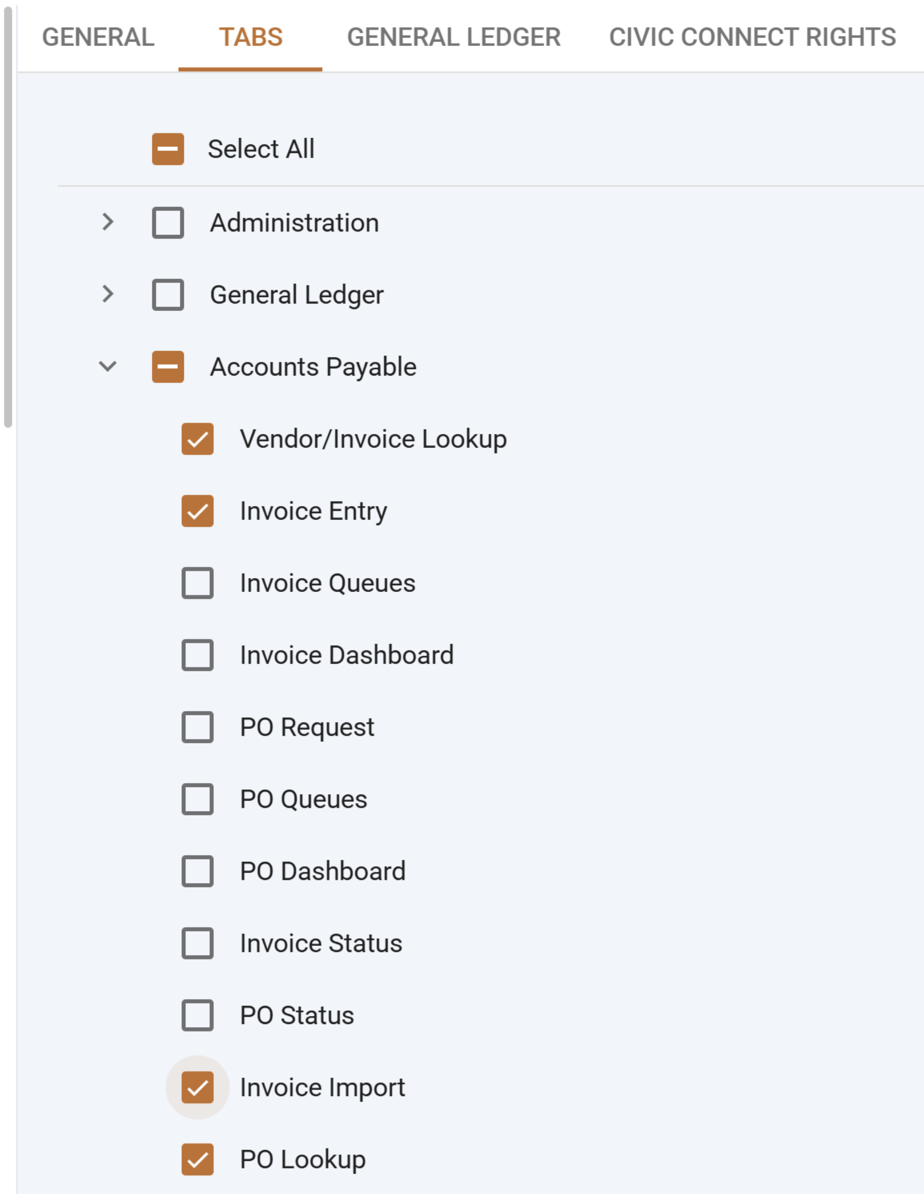
On the General Tab, enter in the Group Name.



Enter in other fields (if applicable).

Go to the Tabs option.

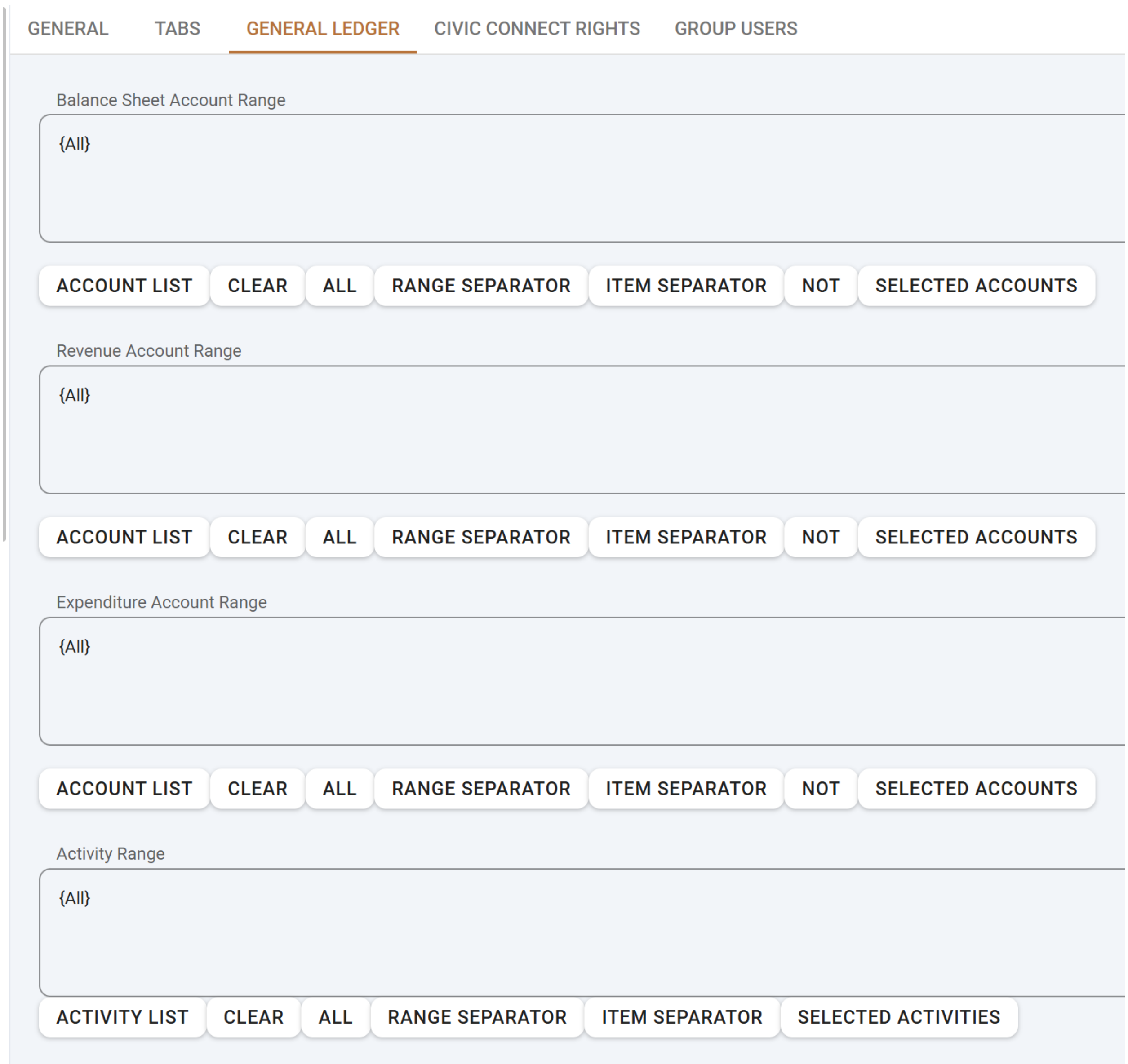
TABS is where you can select which buttons you want users in this group to have access to. For example, in the below, these users would have access to Accounts Payable | Vendor Invoice Lookup, Invoice Entry, Invoice Import, and PO Lookup. Anything that is NOT checked means users in this group will not see those tabs available when they log into miViewpoint. They will only see tabs that they have access to.



General Ledger tab

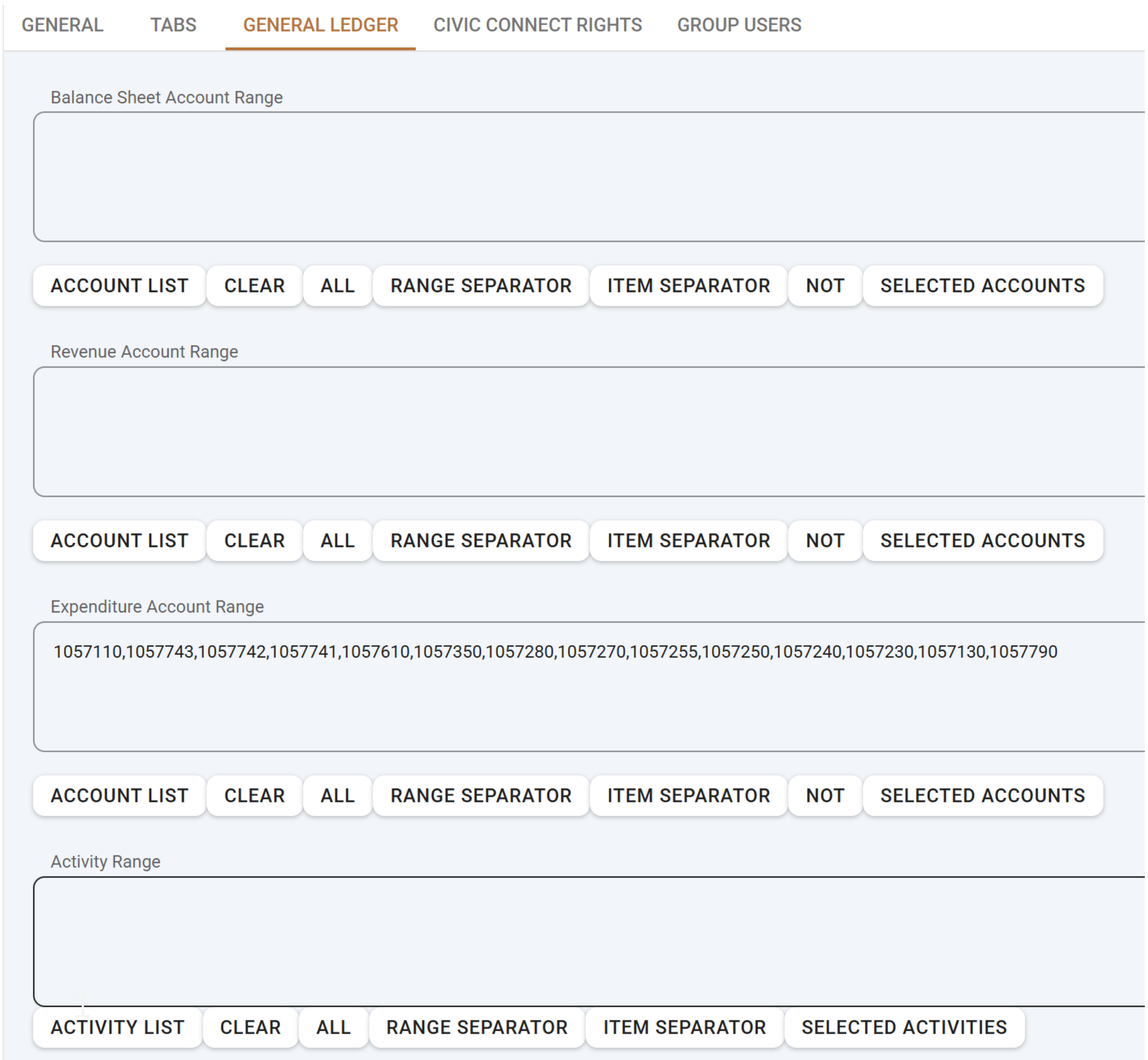
The General Ledger tab for the groups is where you can pick which General Ledger accounts users in a group should be able to have access to. This applies to Entry screens as well as lookup screens.

If you want someone to have access to ALL GL Accounts, you would click ALL. 

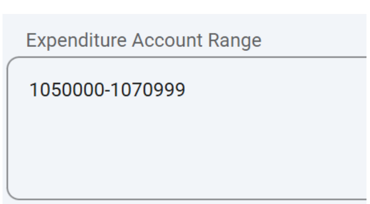


If you want groups to only have access to some accounts, you would specify that on this tab.

In the below example, users in this group would only have access to the specified expenditure accounts listed.



You can separate by commas (like in the example above) or you can add a range of accounts when needed (see below).



You can also choose to mask the accounts list (see below). You can do this by placing an underscrore for each character you do not list.

Expenditure Account Range

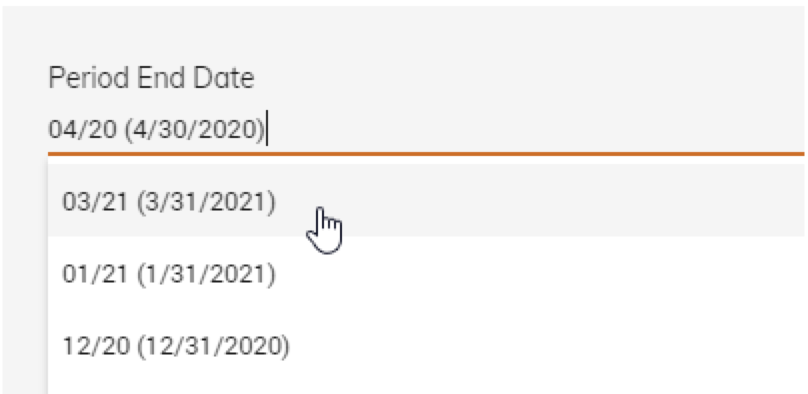
___150____,112_______,120_______,121_______

General Ledger

The General Ledger menu provides you with the ability to view balances and activity from three different points-of-view: Account Lookup, Activity Lookup, and Journal Lookup. If some of these options are not listed in the General Ledger menu, the administrator has not given you rights to view these.

Period End Date

You can change the **Period End Date** to any date in the past or future by clicking on the **Period End Date** drop-down field. The columns in the grid will update automatically when the date is changed. The **Account, Activity, and Journal Lookup** will always default to the current month unless a different month is selected from the **Period End Date** drop-down.



Export Data

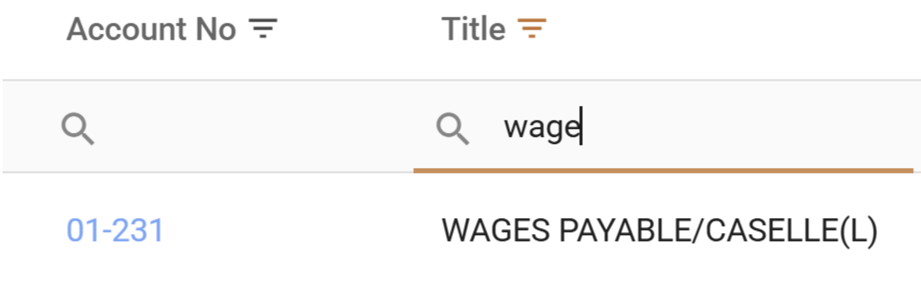
You have the ability to export the data in the **Account, Activity, or Journal Lookup** to Excel. Simply, click the **Export** button  found on the right side of the screen. Depending upon what browser you are using, you may have a couple more steps to follow to export the data into Excel.

Column Chooser

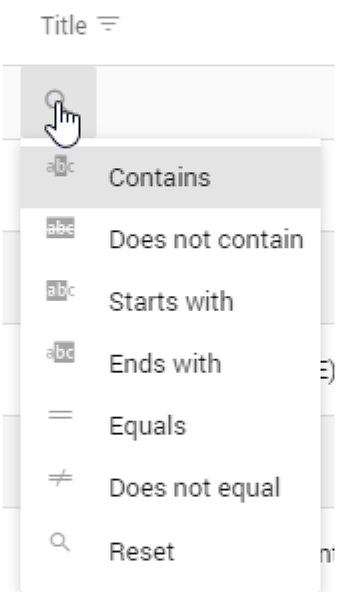
You have the ability to customize the **Account, Activity, or Journal Lookup** by adding or removing columns from the data grid. Simply, click the **Column Chooser** button  found on the right side of the screen. A pop-up will appear providing you with a list of additional columns that can be added to the grid. Add a column by clicking and dragging it into the appropriate place in the grid. Alternatively, you can remove a column by clicking and dragging the column from the grid back into the **Column Chooser** list.

Filtering

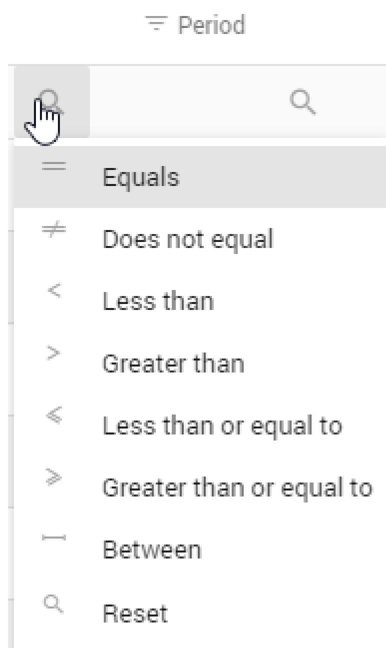
You can filter a screen’s grid by typing in the space below the column headings. As you type, the grid will filter to only show what matches. For example, if you type “wage” in the **Title** filter, only those accounts with the word “wage” in it will appear. No wildcards are necessary. The system will search through every part of the **Title** in this example.



Additional filtering capabilities exist depending upon the type of column that it is. You can access these additional capabilities by hovering over the magnifying glass at the top of any column.

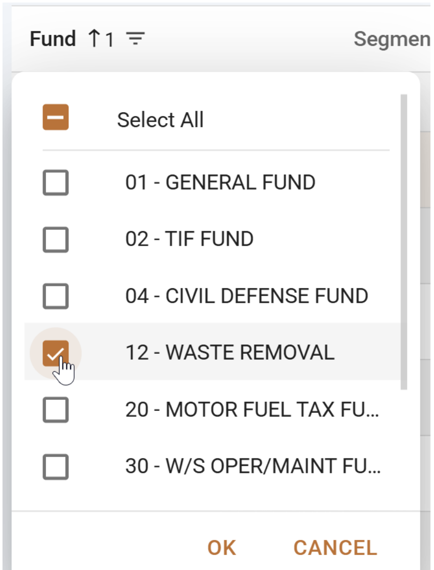


Filtering options for Text field



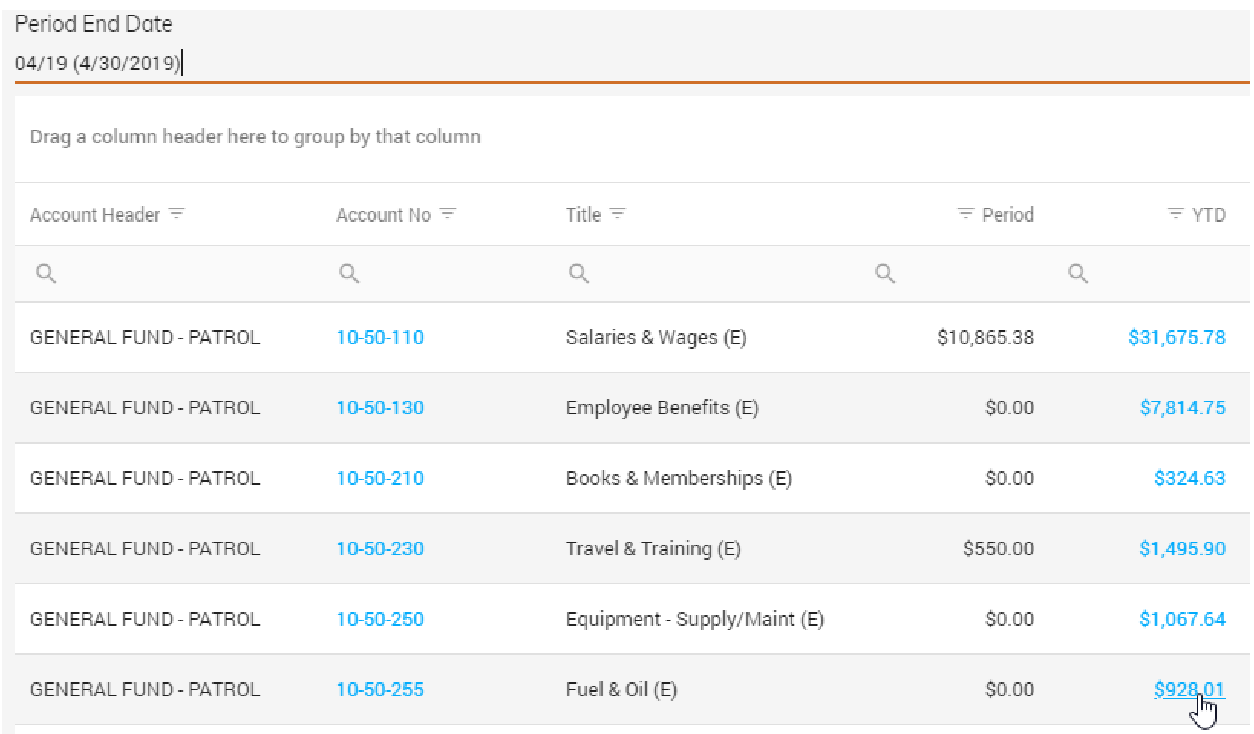
Filtering options for Number field

You can also click the 3 lines by a field to check boxes to filter by. For example, in the below this would filter to show me only fund 12- Waste Removal.



Drill-Down

Fields within the grid that appear in a blue or red font are hyperlinks. These hyperlinks will allow you to drill-down to get more information. Depending upon what hyperlink you click on, the information provided in the drill-down will vary.


Period End Date
04/19 (4/30/2019)

Drag a column header here to group by that column

Account Header	Account No	Title	Period	YTD
GENERAL FUND - PATROL	10-50-110	Salaries & Wages (E)	$10,865.38	$31,675.78
GENERAL FUND - PATROL	10-50-130	Employee Benefits (E)	$0.00	$7,814.75
GENERAL FUND - PATROL	10-50-210	Books & Memberships (E)	$0.00	$324.63
GENERAL FUND - PATROL	10-50-230	Travel & Training (E)	$550.00	$1,495.90
GENERAL FUND - PATROL	10-50-250	Equipment - Supply/Maint (E)	$0.00	$1,067.64
GENERAL FUND - PATROL	10-50-255	Fuel & Oil (E)	$0.00	$928.01

Account Lookup

The Account Lookup provides a list of all account numbers you have been granted access to view. This grid allows you to monitor the balances and activity of each account. To access the Account Lookup, move your mouse to the left so that the menu slides out and select General Ledger | Account Lookup.

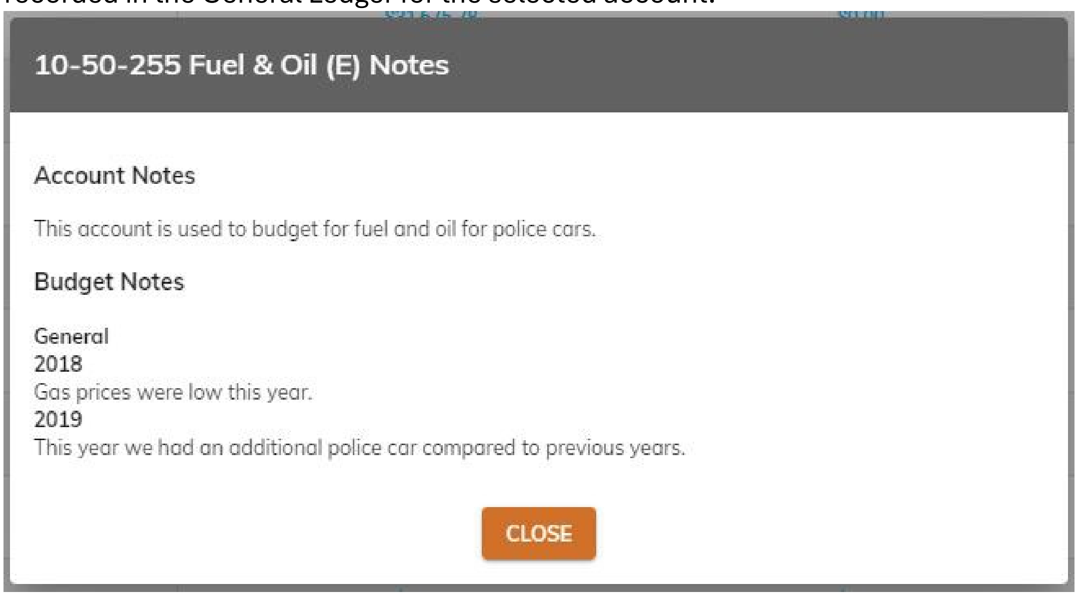
Column Chooser Choices for Account Lookup:

Account Header – This is the group the account belongs to. Normally, the group is the Fund and Department name.
Account ID – This is the reference number of the account behind the scenes in the software.
Account No – This is the formatted account number. You will notice that the account number is hyperlinked. Clicking on the Account No will show account and budget notes related to the account number.
Account No – This is the unformatted account number. This will have the same number as the default Account No in the grid but it will not contain any dashes or periods that format your account numbers.
Account Type – This will show the type of account: Asset, Liability, Equity, Revenue, or Expenditure.
Budget – This amount represents the budget amount for the account as of the selected month/period. This amount is hyperlinked. Clicking on the Budget amount will allow you to see all budget transactions that have been recorded to that account number.
Budget Variance – This amount represents how much is left to spend or earn for the account. The variance is the difference between the year-to-date balance and the budget amount.
Encumbrance – This number represents the amount of open purchase orders related to this account as of the period selected.
Period – This amount represents the dollar amount of activity in the account for the selected month/period.
PY Variance – This amount represents how much is left to spend or earn from the prior year. The variance is the difference between the prior year-to-date balance and the prior year budget amount.
PY1 – This amount represents the prior end-of-year balance. This amount is hyperlinked. Clicking on the PY1 amount will allow you to see all transactions that have been recorded to that account number for the prior year.
PY1YTD – This amount represents the prior year-to-date balance as of the selected month/period. This amount is hyperlinked. Clicking on the PY1YTD will allow you to see all transactions that have been recorded to that account number for the prior year through the month/period selected.

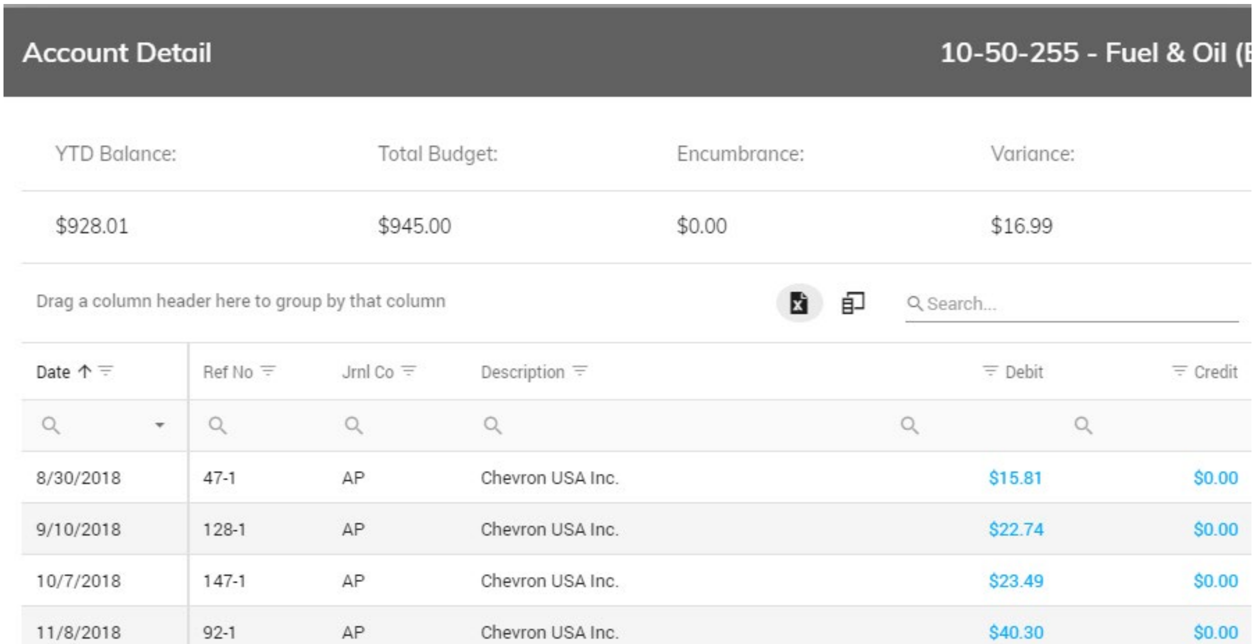
Sparkline – This will give you the ability to see four years worth of history (budget and actual) in a comparison line graph.
Title – This is the title given to the account within the General Ledger. The letter shown in parenthesis behind the title identifies the account type: A = Asset, L= Liability, Q=Equity, R=Revenue, E=Expenditure.

Watch List – This column gives you the ability to remove the account from the Watch List on the Home page. You can still view this account in your Account List, but it will no longer be shown on your Home page.
YTD – This amount represents the year-to-date balance of the account as of the selected month/period. This amount is hyperlinked. Clicking on the YTD amount will allow you to see all transactions that have been recorded to that account number through the month/period selected.
% Budget Spent – This amount represents the percent of budget spent through the month/period selected. The percentage is derived by dividing the year-to-date balance by the budget amount.
% Budget Spent Chart – This chart will reflect the percent of the budget spent in a horizontal bar chart. Green means that less than 70% of the budget has been spent. Yellow means that between 70% and 100% of the budget has been spent. Red means that over 100% of the budget has been spent.
% Budget Variance – This amount represents the percent variance of the account. The percentage is derived by dividing the budget variance into the year-to-date balance.
% PY Variance – This chart represents the prior year percent variance of the account. The percentage is derived by dividing the prior year budget variance into the prior year-to-date balance.

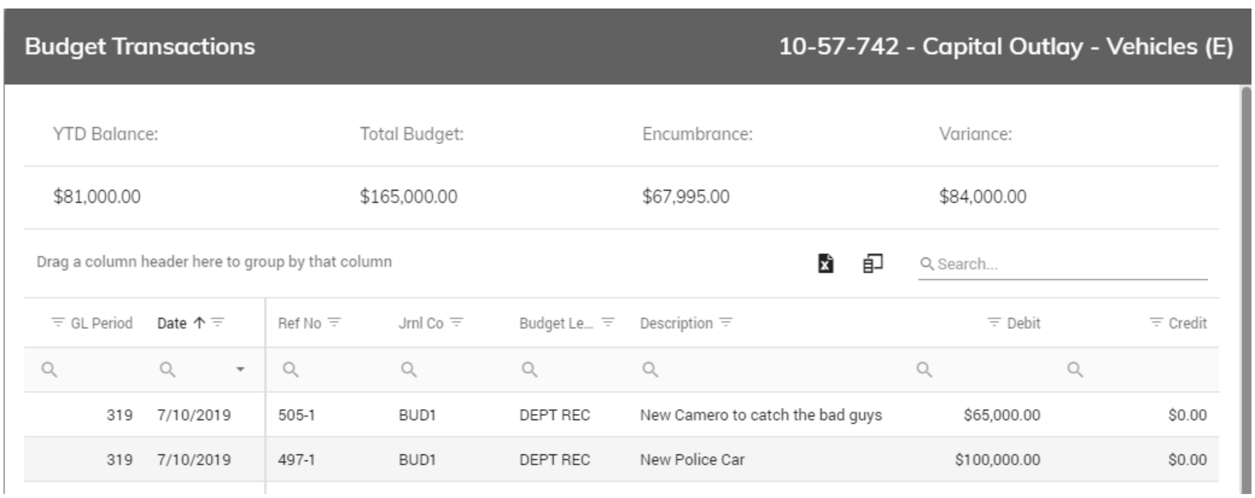
Drill down options for account lookup:
Account Number – Clicking on the Account Number will show any account notes or budget notes recorded in the General Ledger for the selected account.



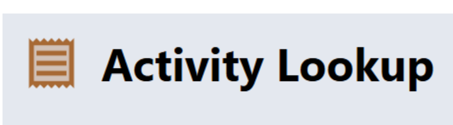
YTD – Clicking on a YTD number will show each transaction that comprises the year-to-date balance. Often you will have the ability to drill-down further from this screen to see the detail of a payroll posting, when a check has cleared the bank, the image of an invoice if your organization is using Accounts Payble Workflow, and more.



Budget – Clicking on a Budget number will show all budget transactions that comprise the budget.



Activity Lookup



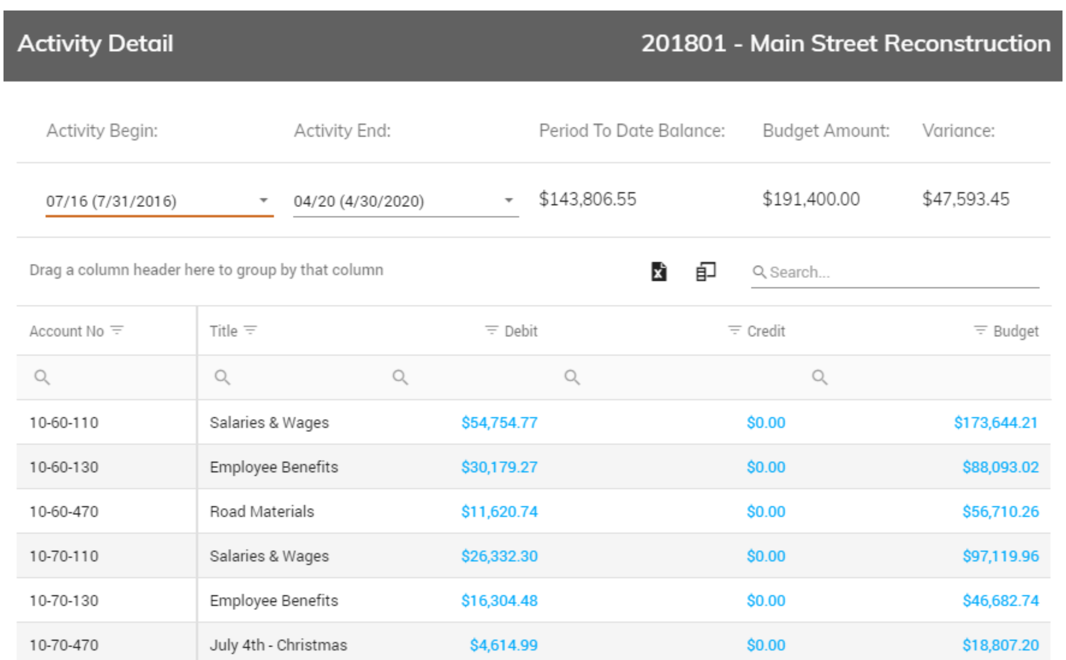
The Activity Lookup provides a list of all activity numbers you have been granted access to view. This grid allows you to monitor the balances and activity of each activity. To access the Activity Lookup, move your mouse to the left so that the menu slides out and select General Ledger | Activity Lookup.

Column Chooser Choices for Activity Lookup:

Act No – This is the activity number assigned in the General Ledger.
ActivityID – This is the reference number of the activity behind the scenes in the software.
Amount – This amount represents the start-to-date balance of the activity as of the selected month/period. This amount is hyperlinked. Clicking on the **Amount** will allow you to see which accounts were used to record transactions related to this activity.
Budget – This amount represents the budget amount for the activity as of the selected month/period. This amount is hyperlinked. Clicking on the **Budget** amount will allow you to see all budget transactions that have been recorded to that activity.
Encumbrance – This number represents the amount of open purchase orders related to this activity as of the period selected.
End Date – This is the end date of the activity.
Start Date – This is the start date of the activity.
Title – This is the title given to the activity within the General Ledger.
Variance – This amount represents how much is left to spend for the activity. The variance is the difference between the amount and the budget amount.
% Variance – This amount represents the percent variance of the activity. The percentage is derived by dividing the variance into the amount.

Drill Down Options for Activity Lookup:

Amount – Clicking on an Amount will show each account utilized to record transactions to that activity number. You can further drill-down to see the detail transactions recorded to that account by clicking on the Debit or Credit number.

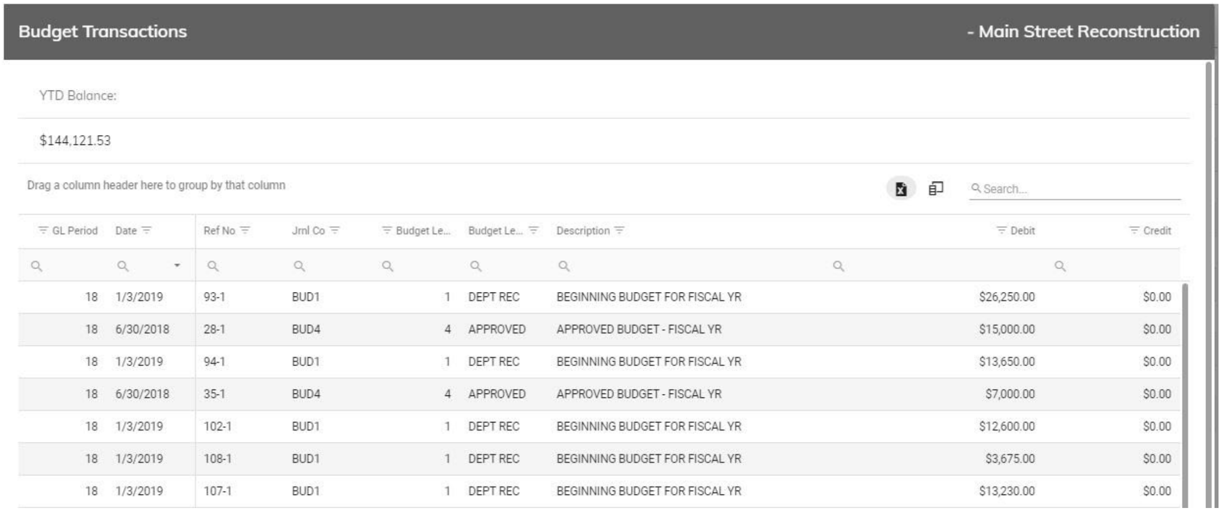

Activity Detail 201801 - Main Street Reconstruction

Activity Begin:	Activity End:	Period To Date Balance:	Budget Amount:	Variance:
07/16 (7/31/2016)	04/20 (4/30/2020)	$143,806.55	$191,400.00	$47,593.45

Drag a column header here to group by that column
Search...

Account No	Title	Debit	Credit	Budget
10-60-110	Salaries & Wages	$54,754.77	$0.00	$173,644.21
10-60-130	Employee Benefits	$30,179.27	$0.00	$88,093.02
10-60-470	Road Materials	$11,620.74	$0.00	$56,710.26
10-70-110	Salaries & Wages	$26,332.30	$0.00	$97,119.96
10-70-130	Employee Benefits	$16,304.48	$0.00	$46,682.74
10-70-470	July 4th - Christmas	$4,614.99	$0.00	$18,807.20

Budget – Clicking on a Budget number will show all budget transactions that comprise the budget.



Budget Transactions - Main Street Reconstruction

YTD Balance:

$144,121.53

Drag a column header here to group by that column

GL Period	Date	Ref No	Jrnl Co	Budget Le...	Budget Le...	Description	Debit	Credit
18	1/3/2019	93-1	BUD1	1	DEPT REC	BEGINNING BUDGET FOR FISCAL YR	$26,250.00	$0.00
18	6/30/2018	28-1	BUD4	4	APPROVED	APPROVED BUDGET - FISCAL YR	$15,000.00	$0.00
18	1/3/2019	94-1	BUD1	1	DEPT REC	BEGINNING BUDGET FOR FISCAL YR	$13,650.00	$0.00
18	6/30/2018	35-1	BUD4	4	APPROVED	APPROVED BUDGET - FISCAL YR	$7,000.00	$0.00
18	1/3/2019	102-1	BUD1	1	DEPT REC	BEGINNING BUDGET FOR FISCAL YR	$12,600.00	$0.00
18	1/3/2019	108-1	BUD1	1	DEPT REC	BEGINNING BUDGET FOR FISCAL YR	$3,675.00	$0.00
18	1/3/2019	107-1	BUD1	1	DEPT REC	BEGINNING BUDGET FOR FISCAL YR	$13,230.00	$0.00

Journal Lookup

The Journal Lookup provides a list of all transactions recorded to a specified journal code. Only those transactions recorded to accounts that you have been granted access will appear. To access the Activity Lookup, move your mouse to the left so that the menu slides out and select General Ledger | Journal Lookup.

Column Chooser Choices for Journal Lookup:

Date – This is the date of the transaction.
Debit – This amount represents a debit to the account.
Description – This is the description of the transaction.
Credit – This amount represents a credit to the account.
Jrl Code – This is the journal code used to record the transaction that appear.
Ref No – This is the reference number of the transaction assigned by the software.

Drill Down Options for Journal Lookup:

Debit or Credit – Clicking on a Debit or Credit number will show each individual transaction that makes-up that entry along with the account number used.

Journal Details

Journal Entries (JE)

Period Date:

419 (4/30/2019)

Add attachments

Journal | Approvals

Drag a column header here to group by that column

Search...

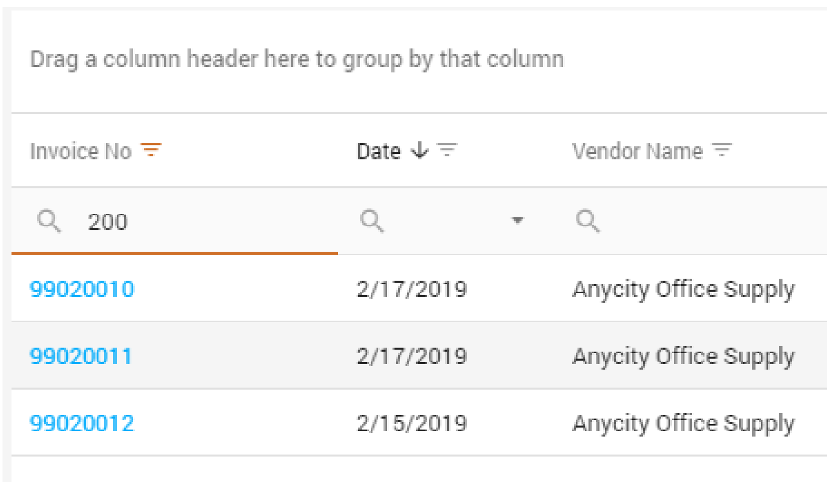
Date	Frmt Acct No	Title	Ref No	Description	Debit	Credit
4/30/2019	10-57-110	Salaries & Wages	1-1	Reclassify Wages	$10,000.00	$0.00
4/30/2019	10-54-110	Salaries & Wages	1-2	Reclassify Wages	$0.00	($10,000.00)

Accounts Payable

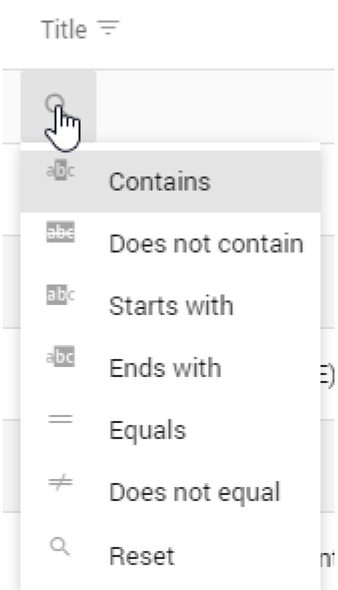
The **Accounts Payable** menu provides you with the ability to view vendor transactions, upload invoice images, and review purchase order history. If some of these options are not listed in the **Accounts Payable** menu, the administrator has not given you rights to view these.

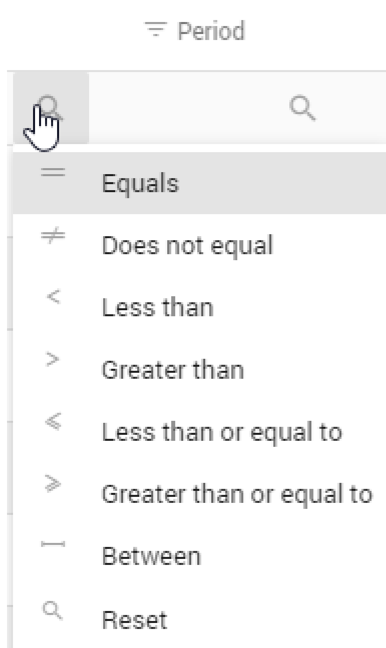
Filtering

You can filter a screen's grid by typing in the space below the column headings. As you type, the grid will filter to only show what matches. For example, if you type "200" in the **Invoice No** filter, only those invoices with "200" in it will appear. No wildcards are necessary. The system will search through every part of the **Invoice No** in this example.

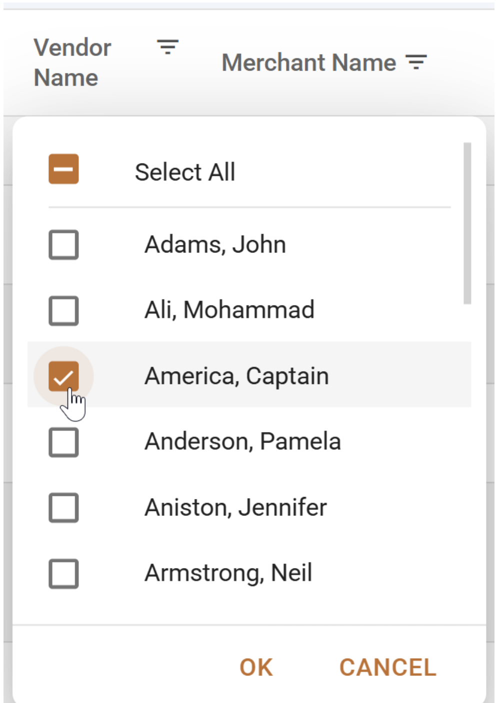


Additional filtering capabilities exist depending upon the type of column that it is. You can access these additional capabilities by hovering over the magnifying glass at the top of any column.





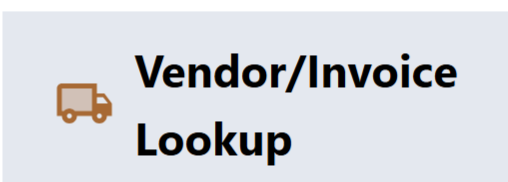
You can also click the 3 lines by a field to check boxes to filter by. For example, in the below this would filter to show me only vendor Captain America.



<u>Drill-Down</u>

Fields within a grid that appear in a blue or red font are hyperlinks. These hyperlinks will allow you to drill-down to get more information. Depending upon what hyperlink you click on, the information provided in the drill-down will vary.

Vendor/Invoice Lookup



The Vendor/Invoice Lookup provides you with the ability to lookup invoices that have been entered into Accounts Payable. To access the Vendor/Invoice Lookup, move your mouse to the left so that the menu slides out and select Accounts Payable | Vendor/Invoice Lookup.

<u>Lookup Fields</u>

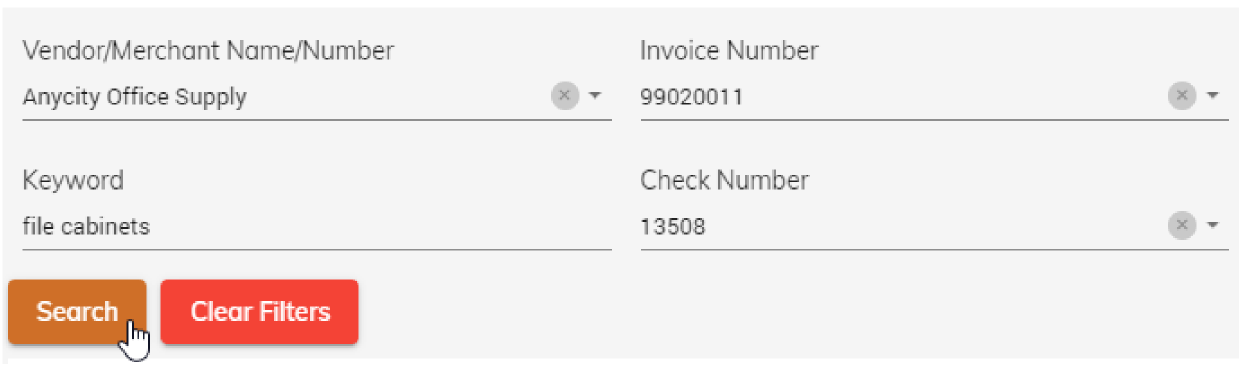
You can find an invoice based on several criteria: **Vendor/Merchant Name/Number**, **Invoice Number**, **Keyword**, and/or **Check Number**. When you are done entering your criteria, click the **Search** button.

Vendor/Merchant Name/Number – Type the vendor name, number, or merchant name into this field. As you type into this field, the closest matches will appear. You can then continue to type or click a selection. Alternatively, you can click the drop-down and select a vendor from the list.

Invoice Number – If you know the invoice number you are trying to find, type the invoice number into this field.

Keyword – You can type a keyword or keywords to search through all invoice descriptions. For example, if I type "file cabinets", the search will find all vendors where file cabinets were purchased.

Check Number – If you know the check number you are trying to find, type the check number into this field.



<u>Export Data</u>

You have the ability to export the data in the **Vendor/Invoice Lookup or PO Lookup** to Excel. Simply, click the **Export** button  found on the right side of the screen. Depending upon what browser you are using, you may have a couple more steps to follow to export the data into Excel.

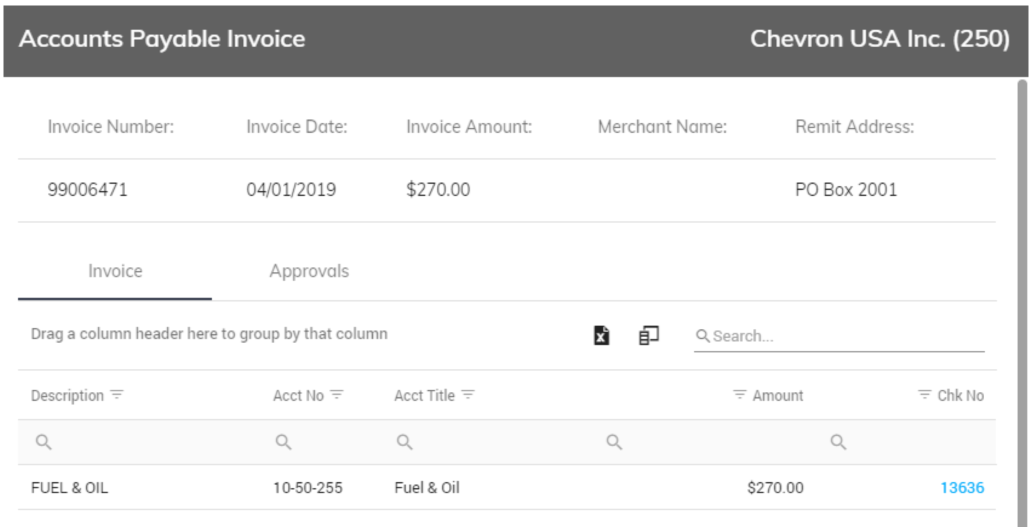
Column Chooser Options for Vendor/Invoice Lookup:

Amount – This is the amount of the invoice.
Chk No – This is the check number used to pay for the invoice.
Date – This is the date of the invoice.
Input Date – This is the date the invoice was entered into the system.
Invoice Number – This is the number of the invoice utilized by the vendor.
Merchant Name – This is the name of the vendor paid. For example, if payment was made to Visa for a purchase at Ace Lumber, Ace Lumber will appear in this field and Visa will appear in the **Vendor Name** field.
Payment Due Date – This is the due date of the invoice entered into the system.
Rating – This is the rating of the vendor entered into the system.

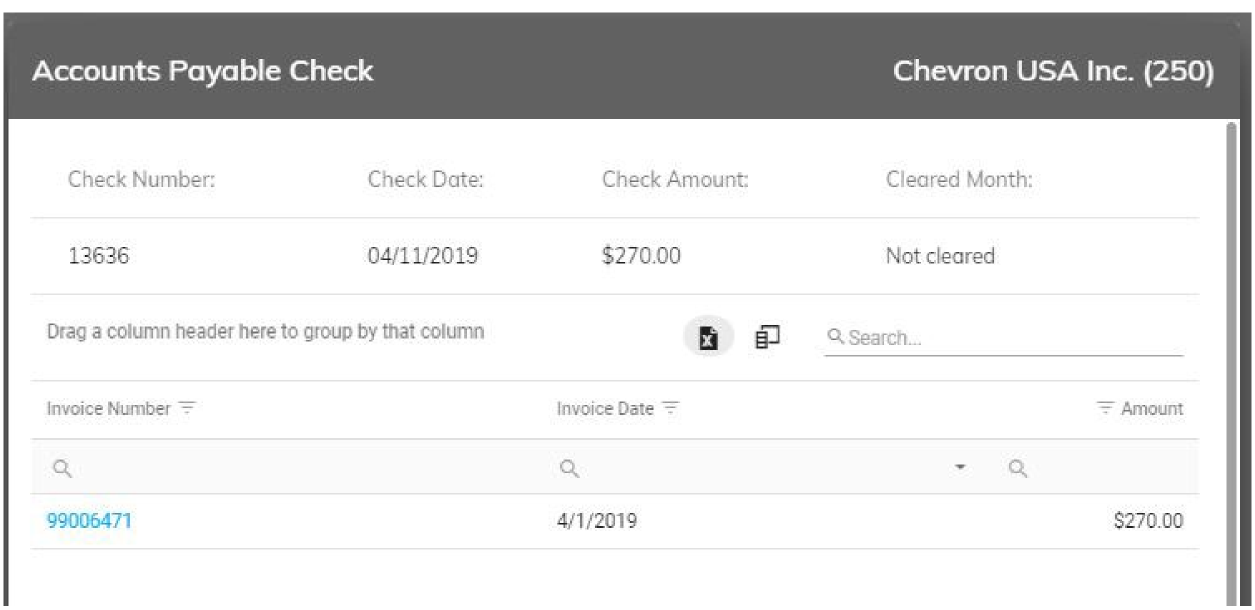
RemitAddress – This is the address where the check was mailed.
Vendor Number – This is the number of the vendor assigned by the system.
Vendor Name – This is the name of the vendor.

Drill Down Options for Vendor/Invoice Lookup:

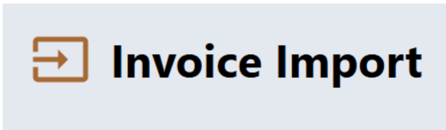
Invoice No – Clicking on the Invoice Number will show details for that invoice. The details include description, account number, amount, check number, and more. You will only see those accounts listed that you have been granted access to. You can continue to drill-down by clicking on the Chk No. This field will be blank if the invoice has not been paid.



Chk No – Clicking on the Check Number will show details for the check. The details include invoice numbers paid on this check, invoice date, check date, check amount, the month the check cleared the bank, and more. you can contineu to drill-down by clicking on the Invoice Number.



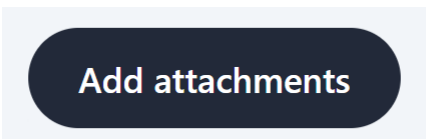
Invoice Import



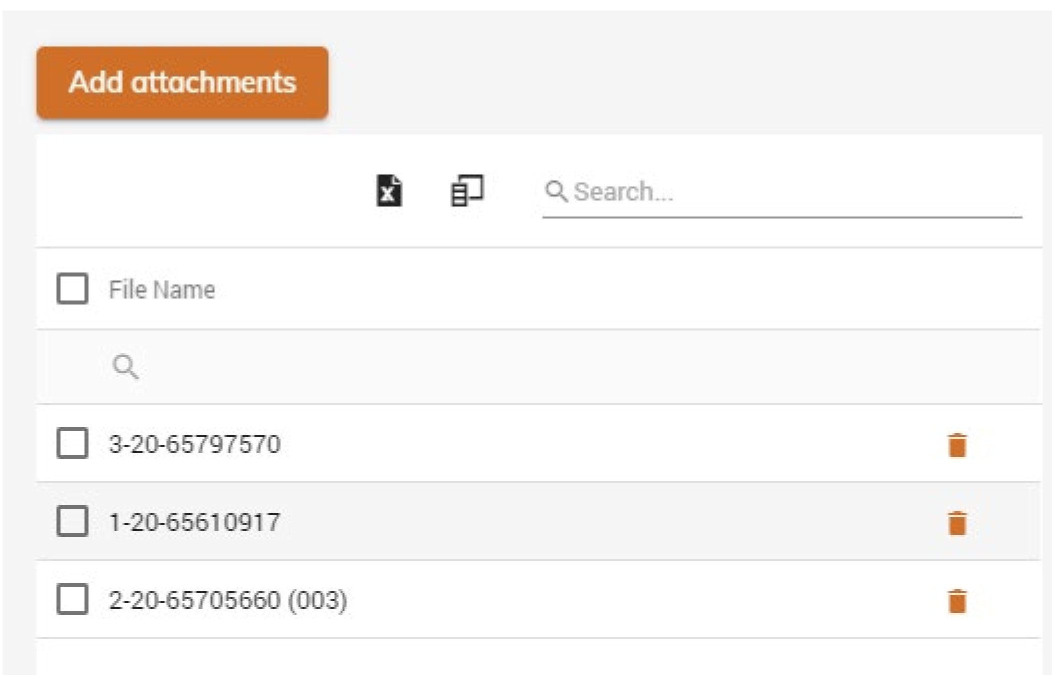
Invoice Import provides the ability to attach a scanned image of the invoice after the invoice has been entered and processed.

To attach an image of the invoice, follow these steps:

1. Select Invoice Import
2. Click **Add attachments** at the top.

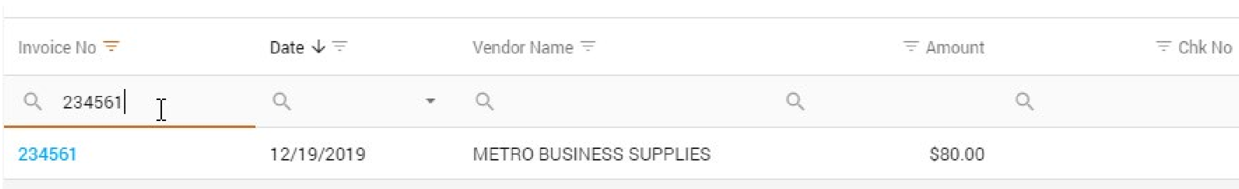


3. Browse to find the invoices you want to attach. You can select more than one invoice by using the Shift and Control keys. Click **Open** when ready. Alternatively, if you have File Explorer or an email open, you can click and drag the file into the area that says **No data**.



4. After the images have been added, click on any file. The invoice will be rendered on the right side of the screen and the check box to the left of the file name will be checked.

5. You can then use the filter fields below the column headings to find the invoice you would like to attach the image to. For example, you can type the invoice number into the **Invoice No** filter field.



6. Once you find the invoice, click on the appropriate line in the grid.

7. Make sure the correct image from step 3 is checked. Click **Link**.

The image will now be viewable from **Account Lookup** and **Vendor/Invoice Lookup**.

8. Repeat steps 4 – 7 for each image.

PO Lookup

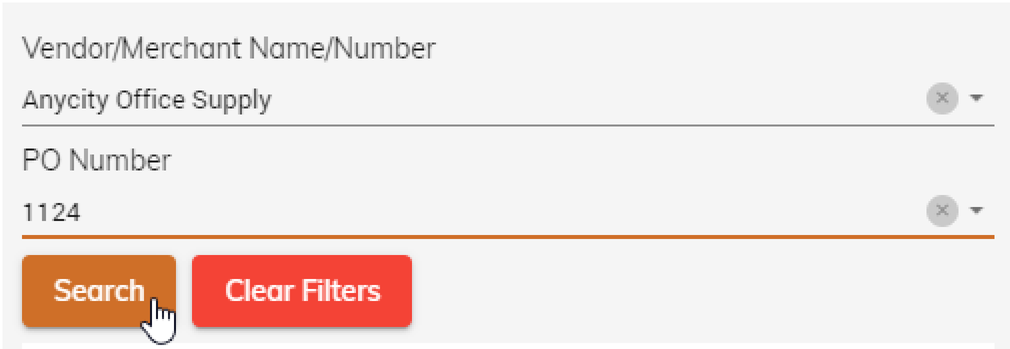
PO Lookup provides you with the ability to lookup purchase orders to view their status, the invoice tied to the purchase order, print the purchase order, and more. To access the PO Lookup, move your mouse to the left so that the menu slides out and select Accounts Payable | PO Lookup.

<u>Lookup Fields</u>

You can find an invoice based on several criteria: **Vendor/Merchant Name/Number** and/or **PO Number**. When you are done entering your criteria, click the **Search** button.

Vendor/Merchant Name/Number – Type the vendor name, number, or merchant name into this field. As you type into this field, the closest matches will appear. You can then continue to type or click a selection. Alternatively, you can click the drop-down and select a vendor from the list.

PO Number – If you know the purchase order number you are trying to find, type the putchase order number into this field.

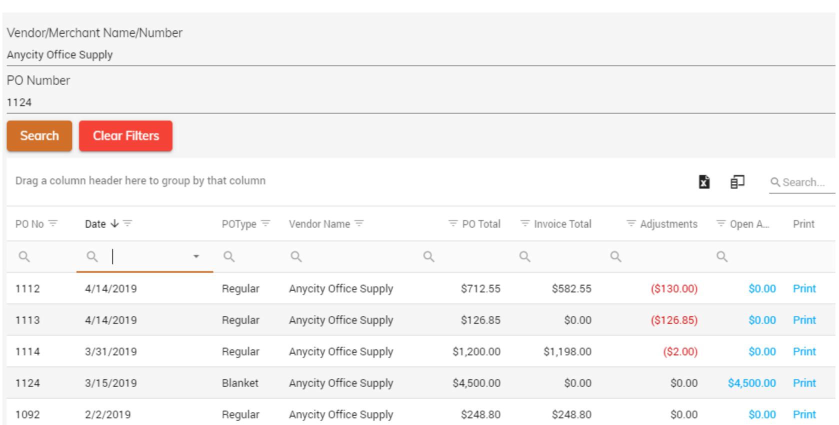


Column Chooser Options for PO Lookup:

Adjustments – This is the total amount of adjustments of the purchase order.
Date – This is the date of the purchase order.
Invoice Total – This is the total amount of invoices used to pay off the purchase order.
Open Amount – This is the open amount of the purchase order. This is derived by taking the **PO PO No –** This is the number of the purchase order.
PO Total – This is the total amount of the purchase order.
POType – This is type of purchase order. There are two options: regular or blanket.
Print – This will provide you with the ability to print an actual purchase order to provide to the vendor.
Total minus the **Invoice Total** plus/minus the **Adjustments**.
Vendor Number – This is the number of the vendor assigned by the system.
Vendor Name – This is the name of the vendor.

Drill Down Options for PO Lookup:

Open Amount – Clicking on the Open Amount will show details for that purchase order. The details include description, account number, amount, and more. You will only see those accounts listed that you have been granted access to. You can scroll down to see what specfic invoices were used to pay off the purchase order.



Total: $1198.00

Create Filter

Drag a column header here to group by that column

Search...

Description	PO No	Invoice No	Acct No	Acct Title	Amount	Chk No
Chamber Celebration Printing...	1114	022315	10-44-610	Miscellaneous Supplies	$1,198.00	

Total: $1198.00

Print – Clicking the Print hyperlink will print a copy of the actual purchase order. Please note, this form may not be the same as the form that was printed from Accounts Payable.

Accounts Receivable

Acccounts Receivable menu provides you with the ability to view customer transactions and invoices outstanding to your organization by billing category. If some of these options are not listed in the **Accounts Receivable** menu, the administrator has not given rights to view these.

Export Data

You have the ability to export the data in the **Customer or Category Lookup** to Excel. Simply, click the **Export** button found on the right side of the screen. Depending upon what browser you are using, you may have a couple more steps to follow to export the data into Excel.

Column Chooser

You have the ability to customize the **Customer or Category Lookup** by adding or removing columns from the data grid. Simply, click the **Column Chooser** button found on the right side of the screen. A pop-up will appear providing you with a list of additional columns that can be added to the grid. Add a column by clicking and dragging it into the appropriate place in the grid. Alternatively, you can remove a column by clicking and dragging the column from the grid back into the **Column Chooser** list.

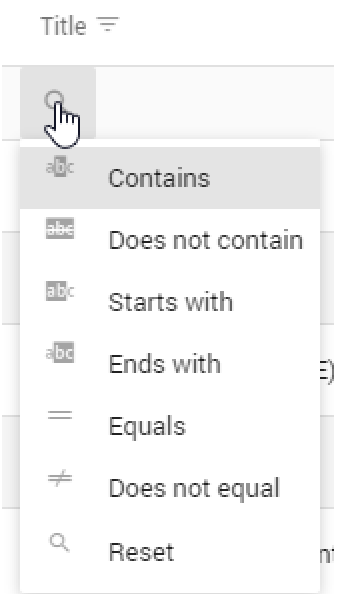
Filtering

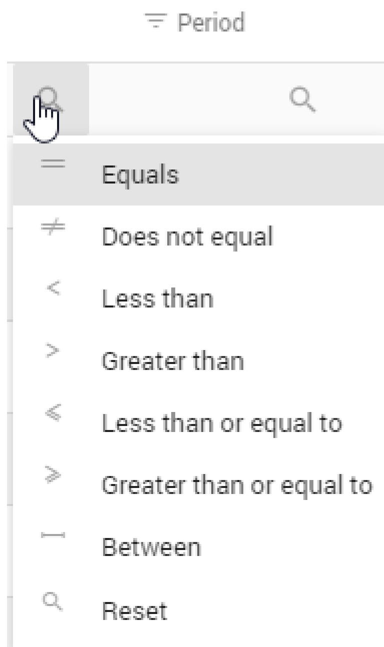
You can filter a screen's grid by typing in the space below the column headings. As you type, the grid will filter to only show what matches. For example, if you type "gen" in the **Category** filter, only those invoices with "gen" in it will appear. No wildcards are necessary. The system will search through every part of the **Category** in this example.

Drag a column header here to group by that column

Custom...	Customer Name	Date	Type	Category
				gen
1000	Test Customer	6/8/2010	Invoice	GENERAL FUND

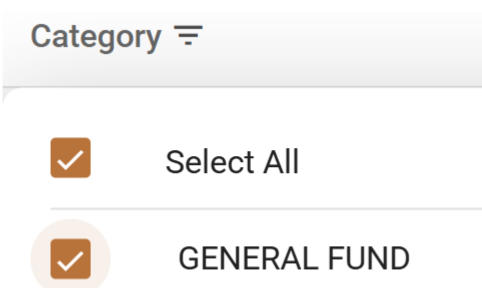
Additional filtering capabilities exist depending upon the type of column that it is. You can access these additional capabilities by hovering over the magnifying glass at the top of any column.



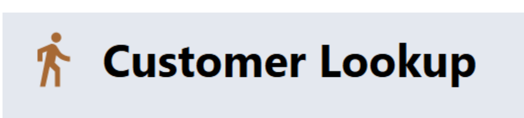


Filtering options for Text field *Filtering options for Number field*

You can also click the 3 lines by a field to check boxes to filter by. For example, in the below this would filter to show me General Fund.



Customer Lookup



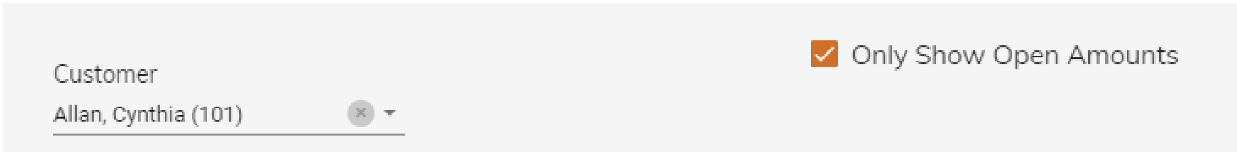
Customer Lookup provides you with the ability to lookup a customer to view billing and payment history and see what invoices are outstanding. To access the Customer Lookup, move your mouse to the left so that the menu slides out and select Accounts Receivable | Customer Lookup.

Lookup Fields

You can find a customer based on **Customer Name/Number**. In addition, you can choose to see only those invoices that are open or outstanding. After selecting a customer, the grid will provide you with the transactions.

Customer Name/Number – Type the customer name or number into this field. As you type into this field, the closest matches will appear. You can then continue to type or click a selection. Alternatively, you can click the drop-down and select a customer from the list.

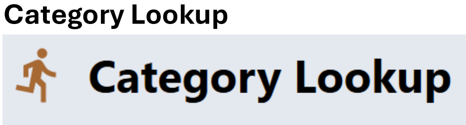
Only Show Open Amounts – Check this box if you would like to only see those invoices that are outanding for that customer.



Column Chooser Options for Customer Lookup:

Amount – This is the amount of the transaction.
Applied Amount – This is the amount that has been applied to another transaction.
Balance – This is the balance due from the customer after the transaction.
Category – This defines what type of transaction it is.
Category Code – This is the code of the category used as assigned by the system.
Cust No – This is number of the customer.
Cust Name – This is name of the customer.
Date – This is the date of the transaction.
Description – This is the description of the invoice or payment.
Due Date – This is the due date of the invoice.
ReferenceNumber – This is the invoice number or other reference number assigned by the system.
Type – This is the type of the transaction. Types include Invoice, Payment, Credit Memo, and more.
Unpaid – This is the amount of the invoice that is unpaid.

Category Lookup



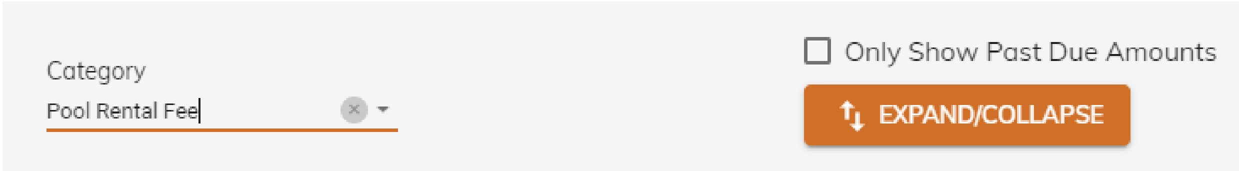
Category Lookup provides you with the ability to lookup what customers have outstanding invoices for a specific billing category. To access the **Category Lookup**, move your mouse to the left so that the menu slides out and select **Accounts Receivable | Category Lookup**.

<u>Lookkup Fields</u>

You can view outstanding invoices for a specific category by using the **Category** drop-down. In addition, you can choose to see only those invoices that are past due. After selecting a category, the grid will provide you with the transactions.

> **Category** – Type the category name into this field. As you type into this field, the closest matches will appear. You can then continue to type or click a

selection. Alternatively, you can click the drop-down and select a customer from the list.
Only Show Past Due Amounts – Check this box if you would like to only see those invoices that are past due on payment.

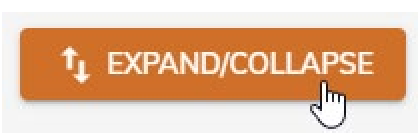


Column Chooser Options for Category Lookup:

Amount – This is the amount of the transaction.
Applied Amount – This is the amount that has been applied to another transaction.
Category – This defines what type of transaction it is.
Category Code – This is the code of the category used as assigned by the system.
Cust Number – This is number of the customer.
Customer Name – This is name of the customer.
Date – This is the date of the transaction.
Description – This is the description of the invoice or payment.
Due Date – This is the due date of the invoice.
ReferenceNumber – This is the invoice number or other reference number assigned by the system.
Type – This is the type of the transaction. Types include Invoice, Payment, Credit Memo, and more.
Unpaid – This is the amount of the invoice that is unpaid.

Expand/Collapse Button

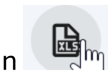
When you select a **Category**, a list of customers with invoices outstanding for that category will appear. You can click the **Expand/Collapse** button to expand the grid so that you see each outstanding invoice rather than just the name of the customer. You can also expand or collapse an individual customer by clicking on the right-pointing arrow to the left of the customer name.



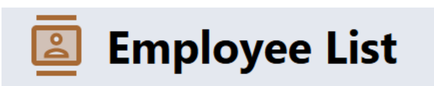
Payroll

Payroll menu provides you with the ability to view employee pay, benefits, overtime, leave balances and more. If some of these options are not listed in the **Payroll** menu, the administrator has not given you rights to view this.

Export Data

You have the ability to export the data in the **Employee List, Overtime Alalysis, Leave Time, or Pay Period Analysis** to Excel. Simply, click the **Export** button  found on the right side of the screen. Depending upon what browser you are using, you may have a couple more steps to follow to export the data into Excel.

Employee List



Employee List provides you with the ability to see wages, overtime, expenses, and benefits for the employees you have access to. To access the **Employee List**, move your mouse to the left so that the menu slides out and select **Payroll | Employee List**.

Lookup Fields

You can filter the employees that appear in the grid by **Department**, **Job Position**, **Status**, and/or **Employee Type**. In addition, you can choose to see **Terminated Employees** and view information for the **Current Year**, **Prior Year**, or for a date range. When you are done entering your criteria, click the **Search** button.

Department – You can select a department from the drop-down. This is useful if you are in-charge of more than one department. Otherwise, all employees for all departments assigned to you will appear in the grid.

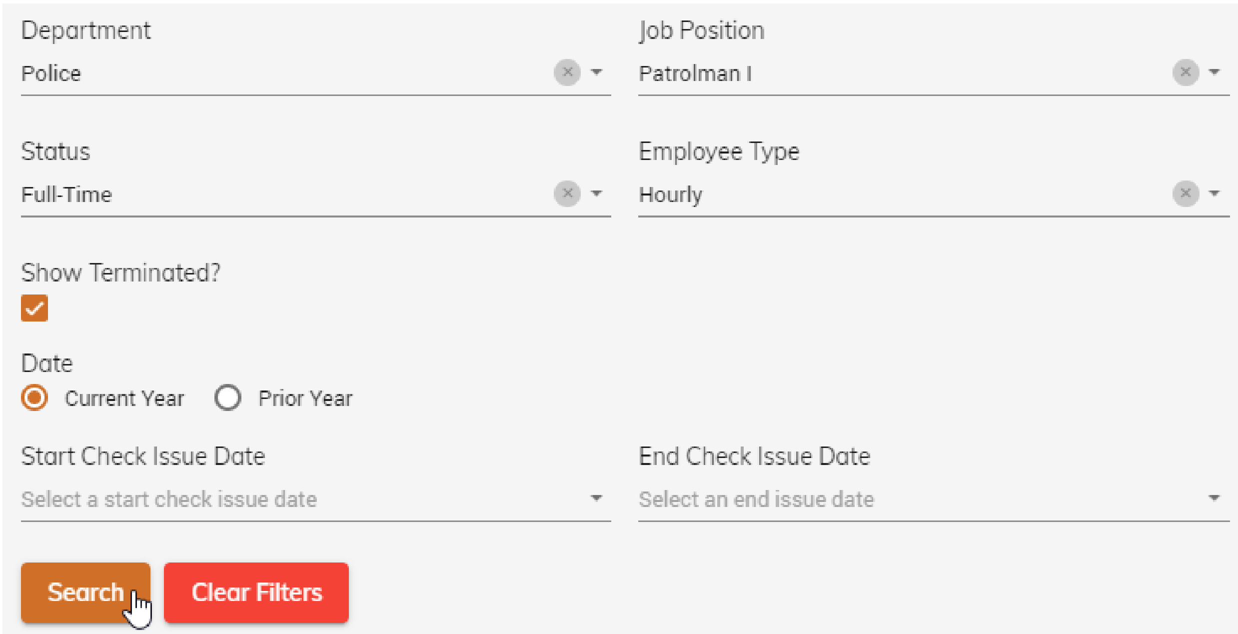
Job Position – You can select a particular job position from the drop-down. Once selected, only those employees will appear in the grid.

Status – You can select a status from the drop-down. Examples of status include full-time, part-time, temporary, and more. Once selected, only those employees will appear in the grid.

Employee Type – You can select an employee type from the drop-down. Examples of employee teypes include hourly, salary, and more. Once selected, only those employees will appear in the grid.

Show Terminated – Check this box if you would like to see employees that are no longer with your organization in the grid.

Date – You have the ability to change what wages, benefits, etc. that you see in the grid. There are three (3) options: Current Year, Prior Year, or date range. If you would like to use a date range, click on the drop-down to select a Start Check Issue Date and an End Check Issue Date.

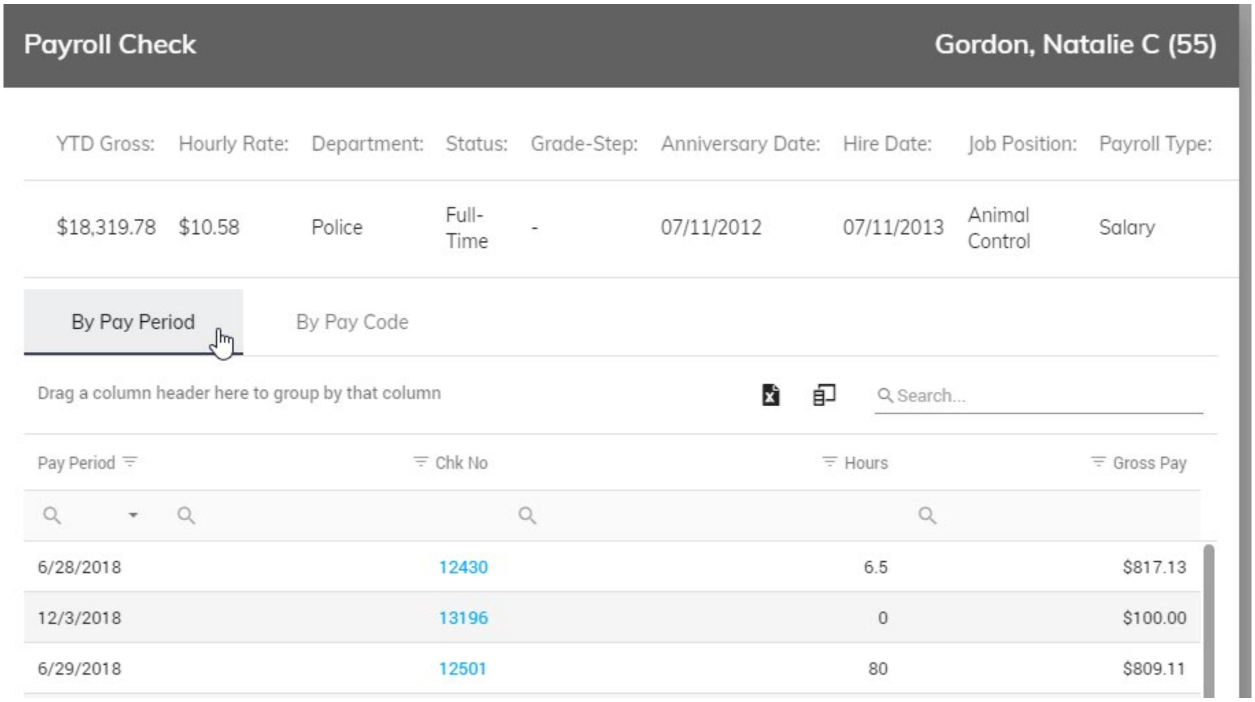


Column Chooser Options for Employee List:

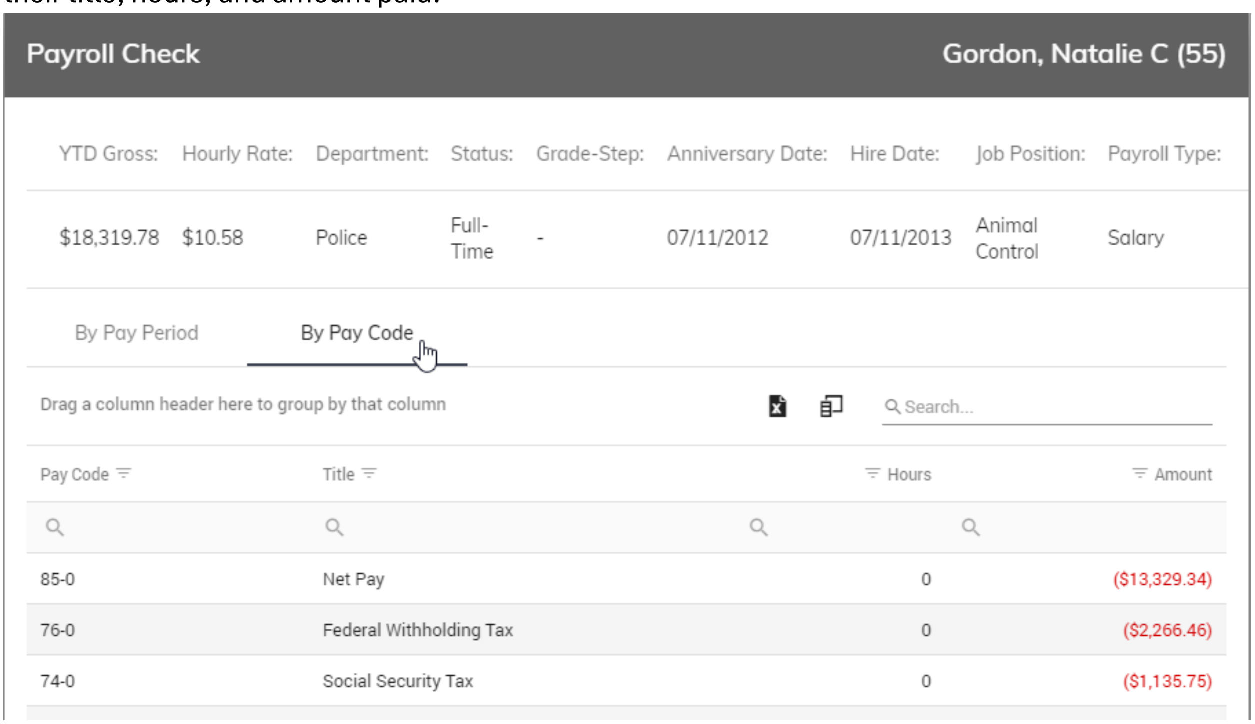
Department – This is the department the employee is associated with.
Emp No – This is the number of the employee as assigned in the system.
Employee Name – This is the name of the employee.
Job Position – This is the current position held by the employee with the organization.
Status – This is the employment status of the employee (e.g. full-time, part-time).
Type – This is the employment type of the employee (e.g. hourly, salary)
YTDGross – This is the total wages paid to the employee.
YTDOvertime – This is the total overtime paid to the employee.
YTDExpenses – This is the total expenses paid to the employee.
YTDBenefits - This is the total benefits paid by the employer on behalf of the employee.

Drill Down Options for Employee List:

YTDGross – Clicking on the **YTDGross** will show more detail about that employee. Details include hourly rate, anniversary date, hire date, and more. In addition, in the grid you will see check number, hours, and gross pay for each pay period. You can click on any check number to see more details about that check.



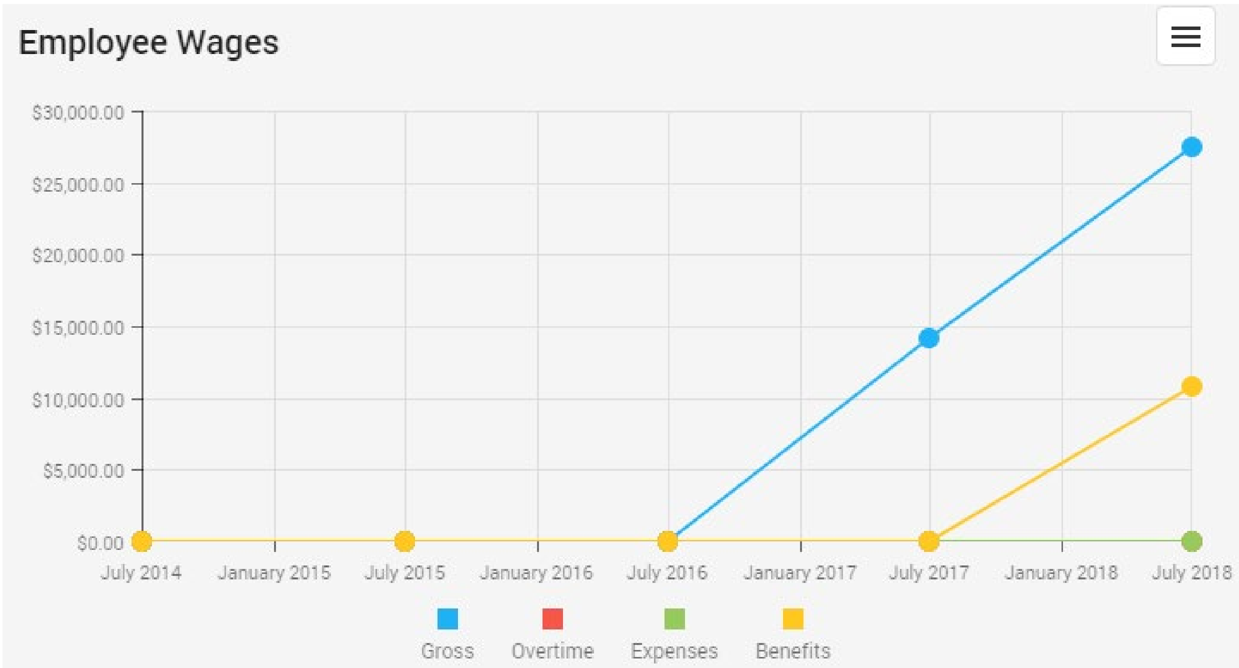
You also have the ability to see what has been paid to an employee **By Pay Code** rather than **By Pay Period**. To do this, click on the **By Pay Code** tab. You will then see a list of pay codes, their title, hours, and amount paid.



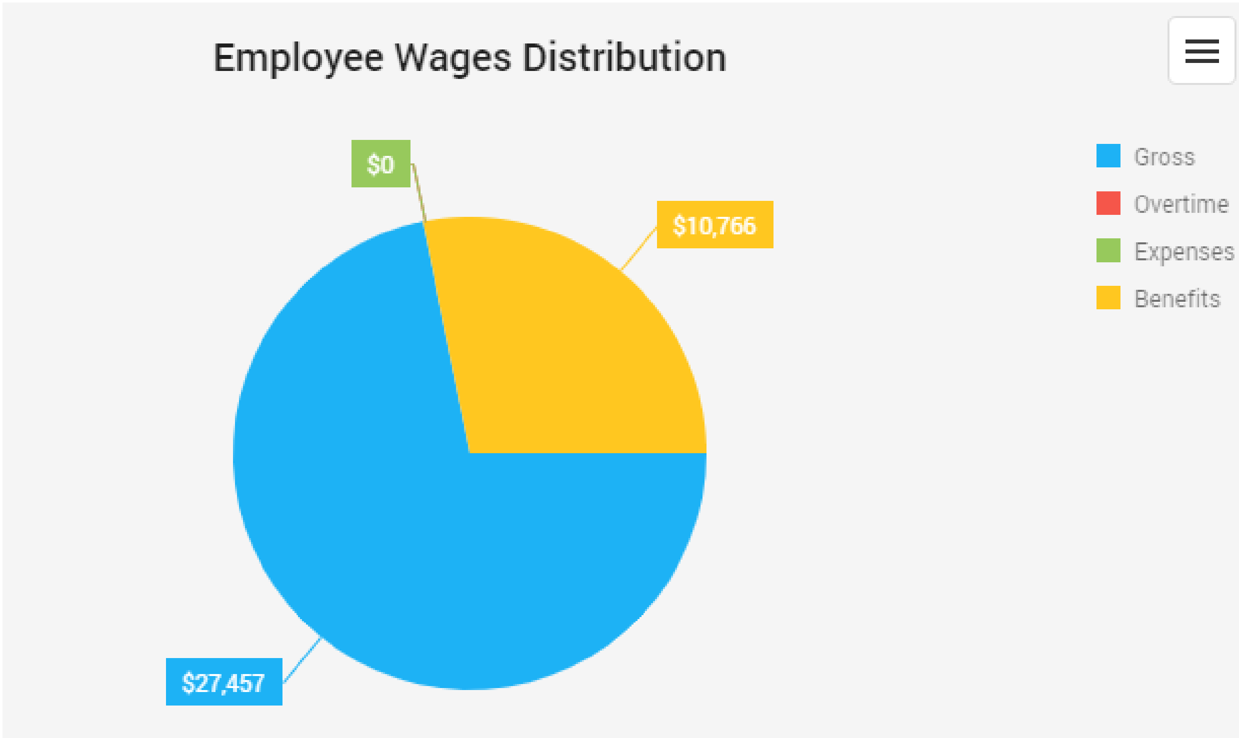
Graphs

By clicking on any employee in the grid, two graphs will generate: **Employee Wages** and **Employee Wage Distribution**.

The **Employee Wages** graph will show how an employee has been paid over time broken down by gross, overtime, expenses, and benefits. You can click on the exporting/pringtin button for options to print or save the graph.



The **Employee Wages Distribution** graph will show a pie chart breaking down how much an employee's pay is gross, overtime, expenses, or benefits. You can click on the exporting/printing button for options to print or save the graph.



Overtime Analysis

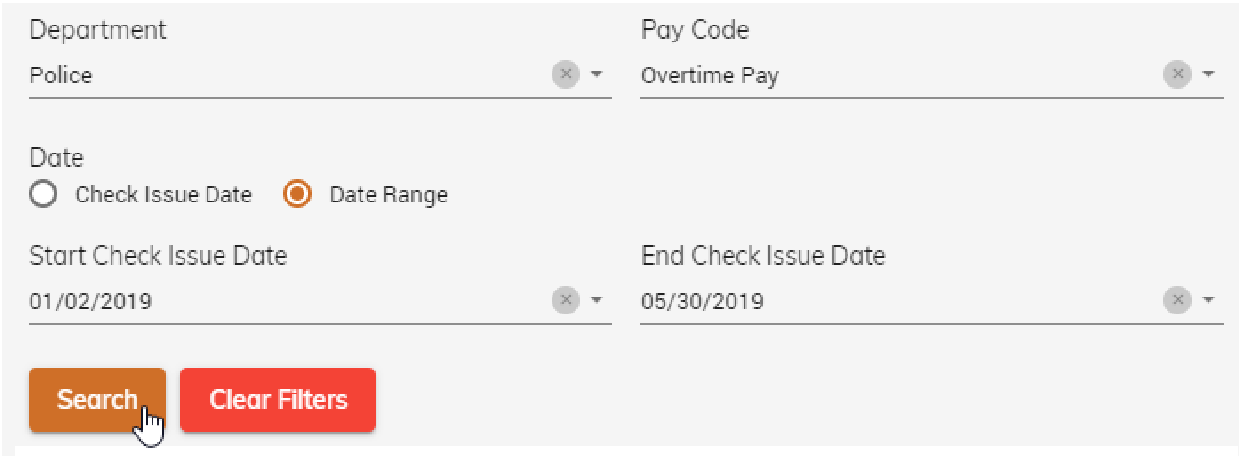
Overtime Analysis provides you with the ability to see total overtime paid for the employees you have access to. To access the **Overtime Analysis,** move your mouse to the left so that the menu slides out and select **Payroll | Overtime Analysis**.

<u>Lookup Fields</u>

You can filter the employees that appear in the grid by **Department** and **Pay Code**. In addition, you can view overtime for a **Check Issue Date** or for a **Date Range.** When you are done entering your criteria, click the **Search** button.

> **Department –** You can select a department from the drop-down. This is useful if you are in-charge of more than one department. Otherwise, all employees for all departments assigned to you will appear in the grid.
> **Pay Code –** You can select a particular overtime pay code from the drop-down. For example, if you only want to see how much has been paid in doube-time, you can select that pay code from the drop-down. Once selected, only those employees will appear in the grid.
> **Date –** You have the ability to see how much overtime has been paid for a Check Issue Date or for a Date Range. To view a specific check date, click the Check Date radio button and select a date from the drop-down.

To view a date range, click the **Date Range** radio button and enter a **Start Check Issue Date** and an **End Check Issue Date**.

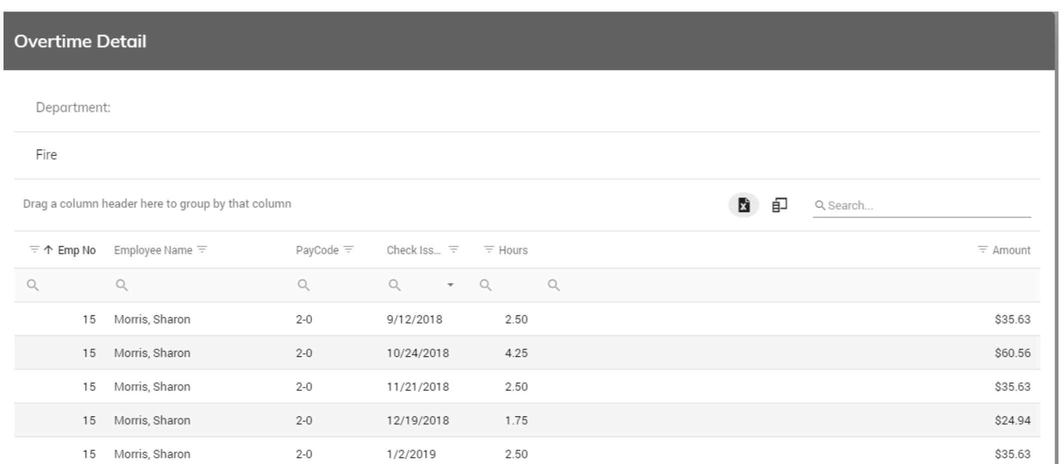


Column Chooser Options for Overtime Analysis:

Amount – This is the total overtime paid to the employee.
Department – This is the department the employee is associated with.
Emp No – This is the number of the employee as assigned in the system.
Employee Name – This is the name of the employee.
Hours – This is the total hours of overtime paid to the employee.

Drill Down Options for Overtime Analysis:

Hours and **Amount** – Clicking on either the **Hours** or the **Amount** will show more detail about the overtime paid to that employee. Details include pay code, check issue date, hours, and amount paid.


Overtime Detail

Department:

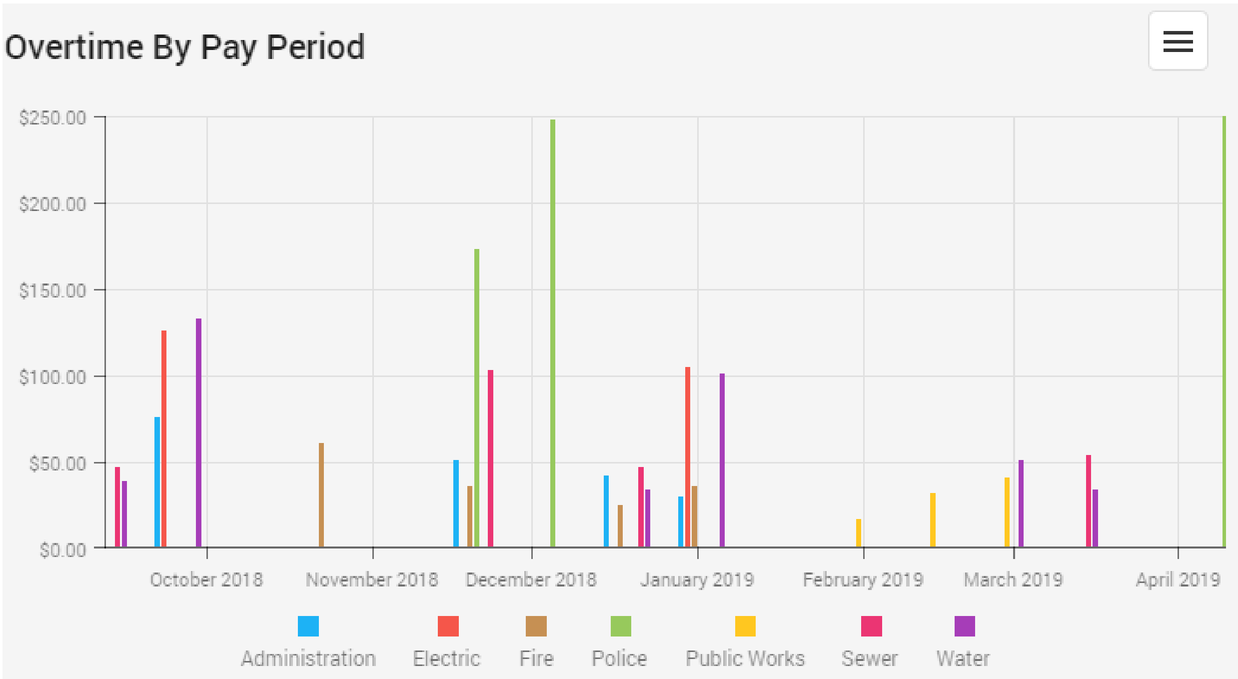
Fire

Drag a column header here to group by that column

Emp No	Employee Name	PayCode	Check Iss...	Hours	Amount
15	Morris, Sharon	2-0	9/12/2018	2.50	$35.63
15	Morris, Sharon	2-0	10/24/2018	4.25	$60.56
15	Morris, Sharon	2-0	11/21/2018	2.50	$35.63
15	Morris, Sharon	2-0	12/19/2018	1.75	$24.94
15	Morris, Sharon	2-0	1/2/2019	2.50	$35.63

Graphs

A bar graph will generate showing how much overtime has been paid over time if you using a **Date Range**. This graph will show a separate bar for each department.



In addition, you have the ability to drill-down from the graph itself by clicking on any bar. By clicking on a bar, a pop-up will appear showing you the pay code, check issue date, hours, and amount for each employee that makes-up that bar in the graph.

You can click on the exporting/printing button  for options to print or save the graph.

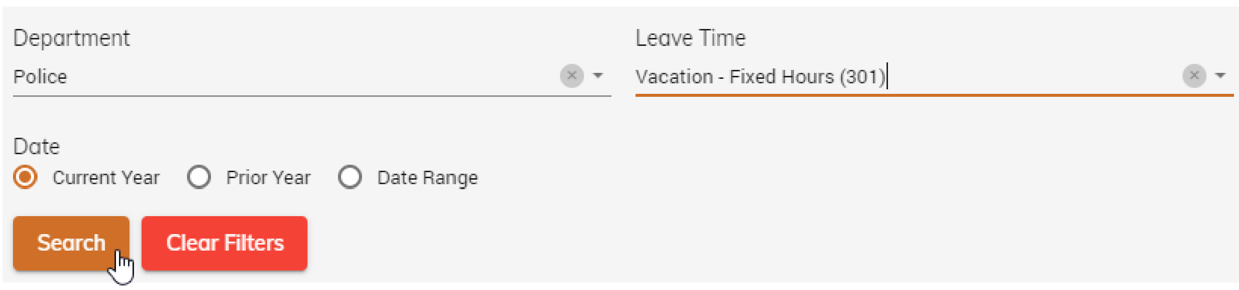
Leave Time

Leave Time provides you with the ability to see leave for the employees you have access to. To access **Leave Time**, move your mouse to the left so that the menu slides out and select **Payroll | Employee List**.

Lookup Fields

You can filter the employees that appear in the grid by **Department** and **Leave Time**. In addition, you can view leave time for the **Current Year**, **Prior Year**, or for a **Date Range.** When you are done entering your criteria, click the **Search** button.

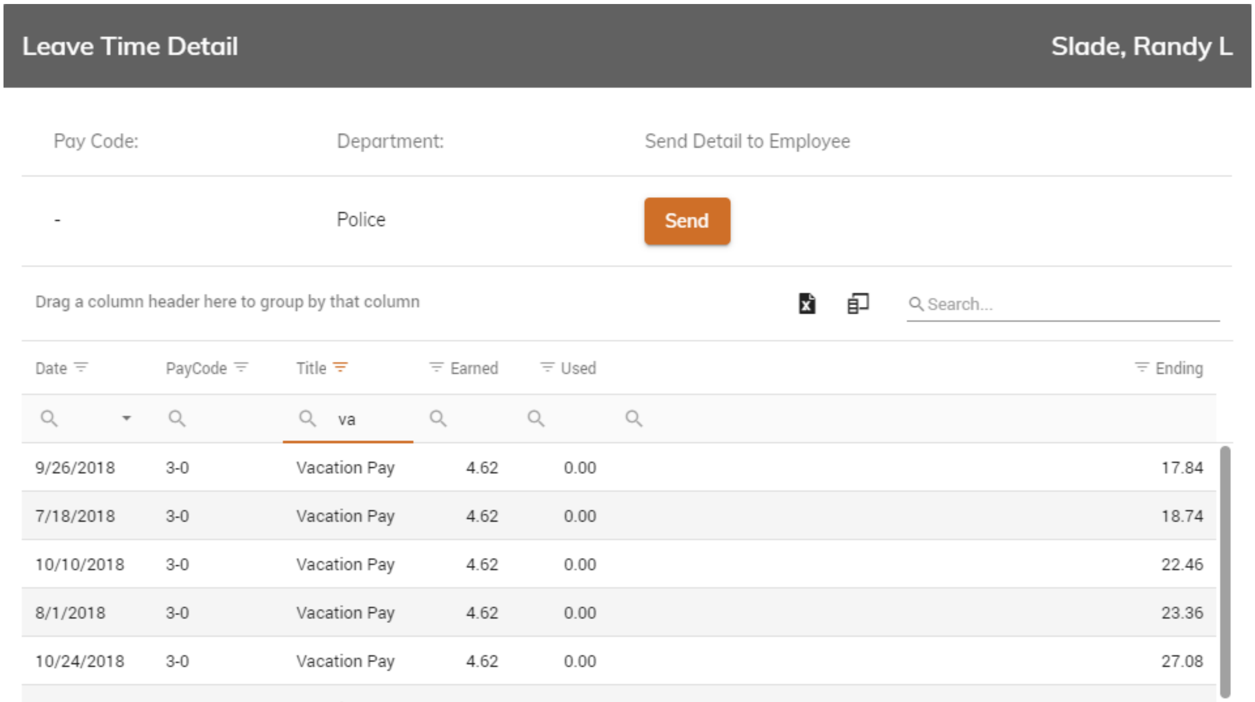
Department – You can select a department from the drop-down. This is useful if you are in-charge of more than one department. Otherwise, all employees for all departments assigned to you will appear in the grid.
Leave Time – You can select a particular leave time pay code from the drop-down. For example, if you only want to see how much sick leave employees have, you can select that leave time pay code from the drop-down. Once selected, only those employees will appear in the grid.
Date – You have the ability to see how much leave employees have for the Current Year, Prior Year, or for a Date Range. To view leave balances for any of these, click the appropriate radio button. If you select the Date Range radio button, you will need to enter a Start Check Issue Date and an End Check Issue Date.



Column Chooser Options for Leave Time:

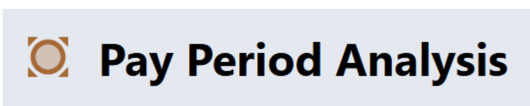
Beginning – This is the beginning balance for the date range specified.
EmployeeID – This is the id assigned by the system for that employee.
Emp No – This is the number of the employee as assigned in the system.
Employee Name – This is the name of the employee.
Department – This is the department the employee is associated with.
DepartmentID – This is the id assigned by the system for that department.
Earned – This is the amount of leave earned for the date range specified.
Email – This is the employee's email address.
Ending – This is the ending balance for the ending date range specified.
Leave Rate – This is the title of the leave (e.g. vacation, sick).
LeaveRateID – This is the id assigned by the system for that leave rate.
PayCode – This is the pay code as assigned within payroll.
PC Title – This is the pay code's title.
Rate – This is the employee's hourly rate of pay.
Used – This is the amount of leave used for the date range specified.

Drill Down Options for Leave Time:
Employee Name and **Used –** Clicking on either the **Employee Name** or the **Used** will show more detail about the leave hours for that employee by pay period. Details include pay period date, pay code title, earned, used, and ending.



You do have the ability to send this summary to the employee by clicking the **Send** button at the top of the drill-down screen.

Pay Period Analysis

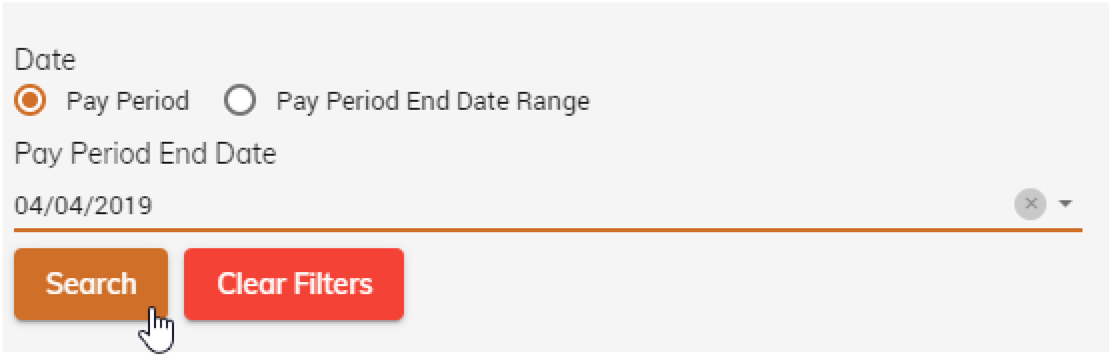


The Pay Period Analysis Time provides you with the ability to see employee pay charged to the accounts you have access to by pay period or date range. To access the **Pay Period Analysis**, move your mouse to the left so that the menu slides out and select **Payroll | Pay Period Analysis**.

<u>Lookup Fields</u>

You can view information for a specific **Pay Period** or for a **Date Range.** When you are done entering your criteria, click the **Search** button.

Date – You have the ability to specify the Pay Period or Pay Period End Date Range. To view a specific pay period or date range, click the appropriate radio button. If you select the Pay Period radio button, you will need to select a pay period end date from the drop-down. If you select the Pay Period End Date Range from the enter a Start Check Issue Date and an End Check Issue Date



Column Chooser Options for Pay Period Analysis:

Acct Hdr – This is the group the account belongs to. Normally, the group is the Department name.
AccountID – This is the reference number of the account behind the scenes in the software.
Acct No – This is the formatted account number.
Account No – This is the unformatted account number. This will have the same number as the default Account No in the grid but it will not contain any dashes or periods that format your account numbers.
Benefits - This is the total benefits charged to the account number.
Expense – This is the total expenses charged to the account number.
Gross Regular – This is the total wages charged to the account number.
Gross Overtime – This is the total overtime charged to the account number.
Gross Misc – This is the total miscellaneous wages charged to the account number.
Title – This is the title given to the account within the General Ledger.
Total – This is the total charged to the account number.

Drill Down Options for Pay Period Analysis:
Gross Regular – Clicking on **Gross Regular** will show all regular wages charged to this account. The drill-down will show Employee, pay code, hours, rate, amount, and more.

Transactions 10-54-110 - Salaries & Wages

Pay Period:

03/22/2019 - 04/04/2019

Drag a column header here to group by that column

Search...

Employee...	Employee Name	Pa...	PC Desc	Cate...	Hours	Rate	Amount
60	McNeil, Annie	1-0	Regular Pay	Gross	40	$6.00	$240.00
55	Gordon, Natalie C	1-0	Regular Pay	Gross	80	$10.58	$846.15
85	Ellison, Ray	1-0	Regular Pay	Gross	80	$12.50	$1,000.00
105	Price, Gordon	1-0	Regular Pay	Gross	80	$12.50	$1,000.00
35	Slade, Randy L	1-0	Regular Pay	Gross	80	$33.00	$2,640.00

Gross Overtime – Clicking on **Gross Overtime** will show all ovetime wages charged to this account. The drill-down will show Employee, pay code, hours, rate, amount, and more.

Transactions 10-54-110 - Salaries & Wages

Pay Period:

03/22/2019 - 04/04/2019

Drag a column header here to group by that column

Search...

Employee...	Employee Name	Pa...	PC Desc	Cate...	Hours	Rate	Amount
60	McNeil, Annie	2-0	Overtime Pay	Gross	3.5	$9.00	$31.50
85	Ellison, Ray	2-0	Overtime Pay	Gross	5.5	$18.75	$103.13
55	Gordon, Natalie C	2-0	Overtime Pay	Gross	7.25	$15.87	$115.02

Expenses– Clicking on **Expenses** will show all employee expenses, like mileage, charged to this account. The drill-down will show Employee, pay code, hours, rate, amount, and more.

Transactions — **10-54-230 - Travel & Training**

Pay Period:

03/22/2019 - 04/04/2019

Drag a column header here to group by that column

Search...

Employee...	Employee Name	Pa...	PC Desc	Cate...	Hours	Rate	Amount
85	Ellison, Ray	21-0	Travel Reimbursment	Expense	0	$0.00	$125.00
105	Price, Gordon	21-0	Travel Reimbursment	Expense	0	$0.00	$203.75

Benefits – Clicking on **Benefits** will show all employee benefits charged to this account. The drill-down will show Employee, pay code, amount, and more.

Transactions — **10-54-130 - Employee Benefits**

Pay Period:

03/22/2019 - 04/04/2019

Drag a column header here to group by that column

Search...

Employee...	Employee Name	Pa...	PC Desc	Category	Amount
35	Slade, Randy L	74-0	Social Security Tax	Tax	$163.68
35	Slade, Randy L	75-0	Medicare Tax	Tax	$38.28
55	Gordon, Natalie C	90-0	PERA	Informational	$83.53
85	Ellison, Ray	90-0	PERA	Informational	$108.90
105	Price, Gordon	90-0	PERA	Informational	$112.97

Utility Management

From the Utility Management menu, you can look up limited customer information.

<u>Export Data</u>

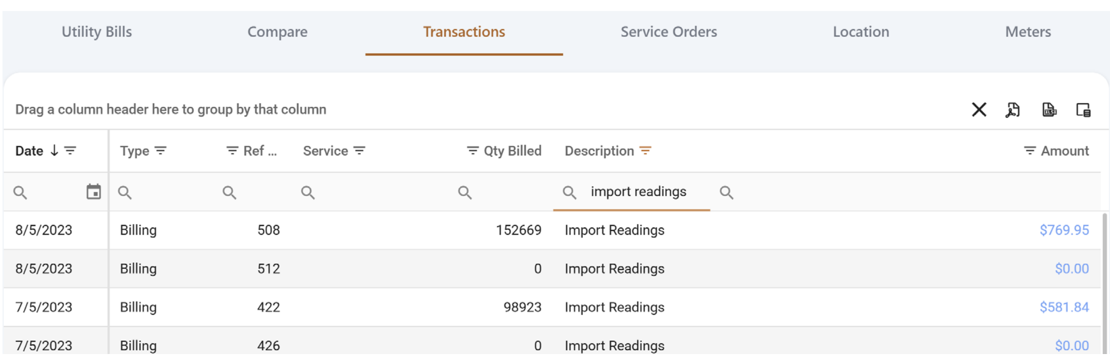
You have the ability to export the data in **Customer Inquiry or Police Customer Lookup** to Excel. Simply, click the **Export** button found on the right side of the screen. Depending upon what browser you are using, you may have a couple more steps to follow to export the data into Excel.

<u>Column Chooser</u>

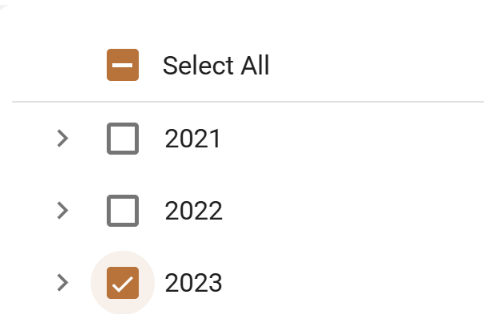
You have the ability to customize the **Customer Inquiry or Police Customer Lookup** by adding or removing columns from the data grid. Simply, click the **Column Chooser** button found on the right side of the screen. A pop-up will appear providing you with a list of additional columns that can be added to the grid. Add a column by clicking and dragging it into the appropriate place in the grid. Alternatively, you can remove a column by clicking and dragging the column from the grid back into the **Column Chooser** list.

<u>Filtering</u>

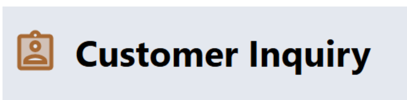
You can filter the grid by typing in the space below the column headings. As you type, the grid will filter to only show what matches. For example, if you type “import readings” in the **Transaction Description** filter, only those descriptions with import readings in them will appear. No wildcards are necessary.



You can also click the 3 lines by a field to check boxes to filter by. For example, in the below this would filter to show me only bill dates in 2023.



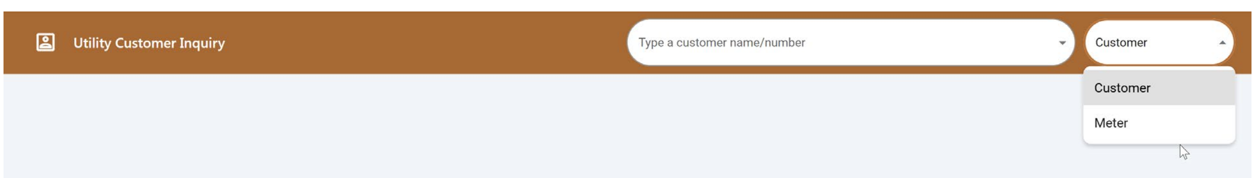
Customer Inquiry



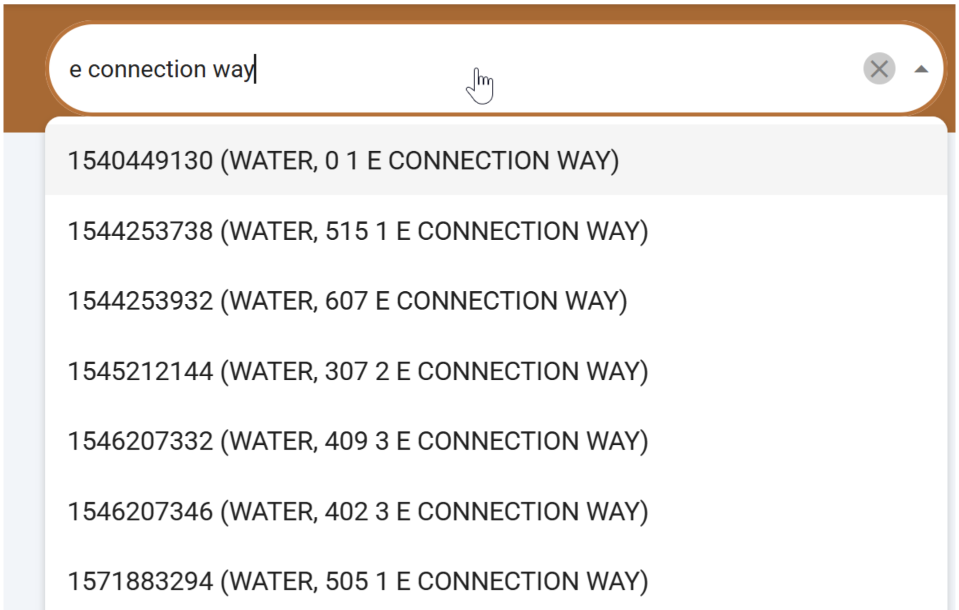
Customer Inquiry provides you with the ability to look up utility customers to view billing and payment history along with consumption. To access Customer Inquiry, move your mouse to the left so that the menu slides out and select Utility Management | Customer Inquiry.

<u>Lookup Fields</u>

You can find a customer based on several criteria: **Customer Name/Number, Meter ID, or Service Address**.



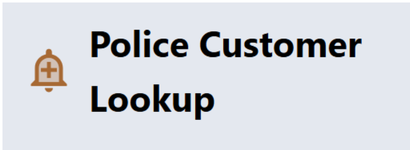
Customer Name/Number – Type the customer name or number into this field. As you type into this field, the closest matches will appear. You can then continue to type or click a selection. Alternatively, you can click the drop-down and select a customer from the list.
Meter – Type the service address or Meter ID into this field. As you type into this field, the closest match will appear. You can then continue to type or click a selection. You can start typing the street name and it will show all addresses on that street for you to select.



Column Chooser Options for Customer Inquiry:

Cust Address 1 – This is the mailing address 1 of the customer.
Cust Address 2 – This is the mailing address 2 of the customer.
Cust City – This is the city of where the utility bill is mailed.
Cust Name – This is name of the customer.
Cust No – This is number of the customer.
Cust State – This is the state of where the utility bill is mailed.
Cust Tele 1 – This is the telephone number for the customer.
Cust Zip – This is the zip code of where the utility bill is mailed.
Final Bill Date – If the customer has been terminated, this is the final bill date.
Landlord Name – If the service address is a tenant property, this is the landlord that owns the property.
Landlord Phone - If the service address is a tenant property, this is the landlord's phone number.
Latitude – This is the latitude of the service address.
ParcelID – This is the parcel number for the service address.
Service Address – This is the service address of the customer.
Service City – This is the city of the service address.
Service State – This is the state of the service address.
Service Zip – This is the zip code of the service address.

Police Customer Lookup

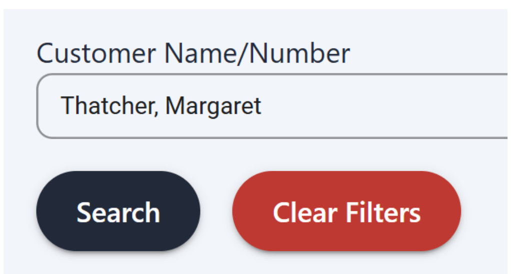


The **Police Customer Lookup** provides you with the ability to look up basic information related to utility customers. This view was meant for dispatch to simply view who the active resident is at a service address along with their telephone number and other information. To access the **Police Customer Lookup**, move your mouse to the left so that the menu slides out and select **Utility Management | Police Customer Lookup**.

<u>Lookup Fields</u>

You can find a customer based on **Customer Name/Number**. When you are done entering your criteria, click the **Search** button.

> **Customer Name/Number –** Type the customer name or number into this field. As you type into this field, the closest matches will appear. You can then continue to type or click a selection. Alternatively, you can click the drop-down and select a customer from the list.



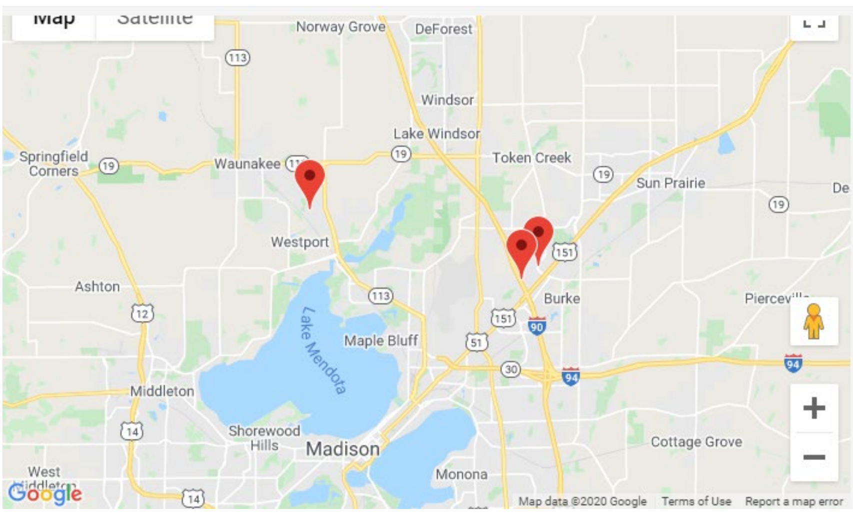
Column Chooser Options for Police Lookup:

> **Cust Address 1** – This is the mailing address 1 of the customer.
> **Cust Address** 2 – This is the mailing address 2 of the customer.
> **Cust City** – This is the city of where the utility bill is mailed.
> **Cust Name –** This is name of the customer.
> **Cust State** – This is the state of where the utility bill is mailed.
> **Cust Tele 1** – This is the telephone number for the customer.
> **Cust Zip** – This is the zip code of where the utility bill is mailed.
> **Land Address 1 –** If the service address is a tenant property, this is the landlord's address.
> **Land Address 2** – If the service address is a tenant property, this is the landlord's address.
> **Land City** – If the service address is a tenant property, this is the landlord's city.
> **Land State** – If the service address is a tenant property, this is the landlord's state.
> **Land Zip** – If the service address is a tenant property, this is the landlord's zip.
> **Landlord** – If the service address is a tenant property, this is the landlord that owns the property.
> **Landlord Tele** – If the service address is a tenant property, this is the landlord's phone number.

Notes – This will show any notes associated with the service location.
ParcelID – This is the parcel number for the service address.
Service Address – This is the service address of the customer.
Service City – This is the city of the service address.
Service State – This is the state of the service address.
Service Zip – This is the zip code of the service address.

Graphs

If you click on the check box next to any customer or customers, a pin appear on the Google map indicating the physical location of that address or addresses.

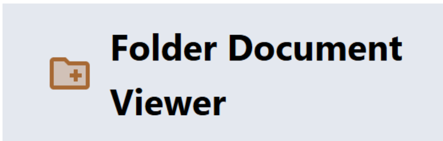


You can click on the exporting/printing button ≡ for options to print or save the graph.

Other

From the Other menu, you can view reports that have been from the system.

Folder Document Viewer



Folder Document Viewer provides you with the ability to view reports that someone has generated from the financial or utility billing system for you to view. To access the Folder Viewer, move your mouse to the left so that the menu slides out and select Other | Folder Viewer.

Simply click on any report that appears in the list. The report will then appear on the right side of the screen.