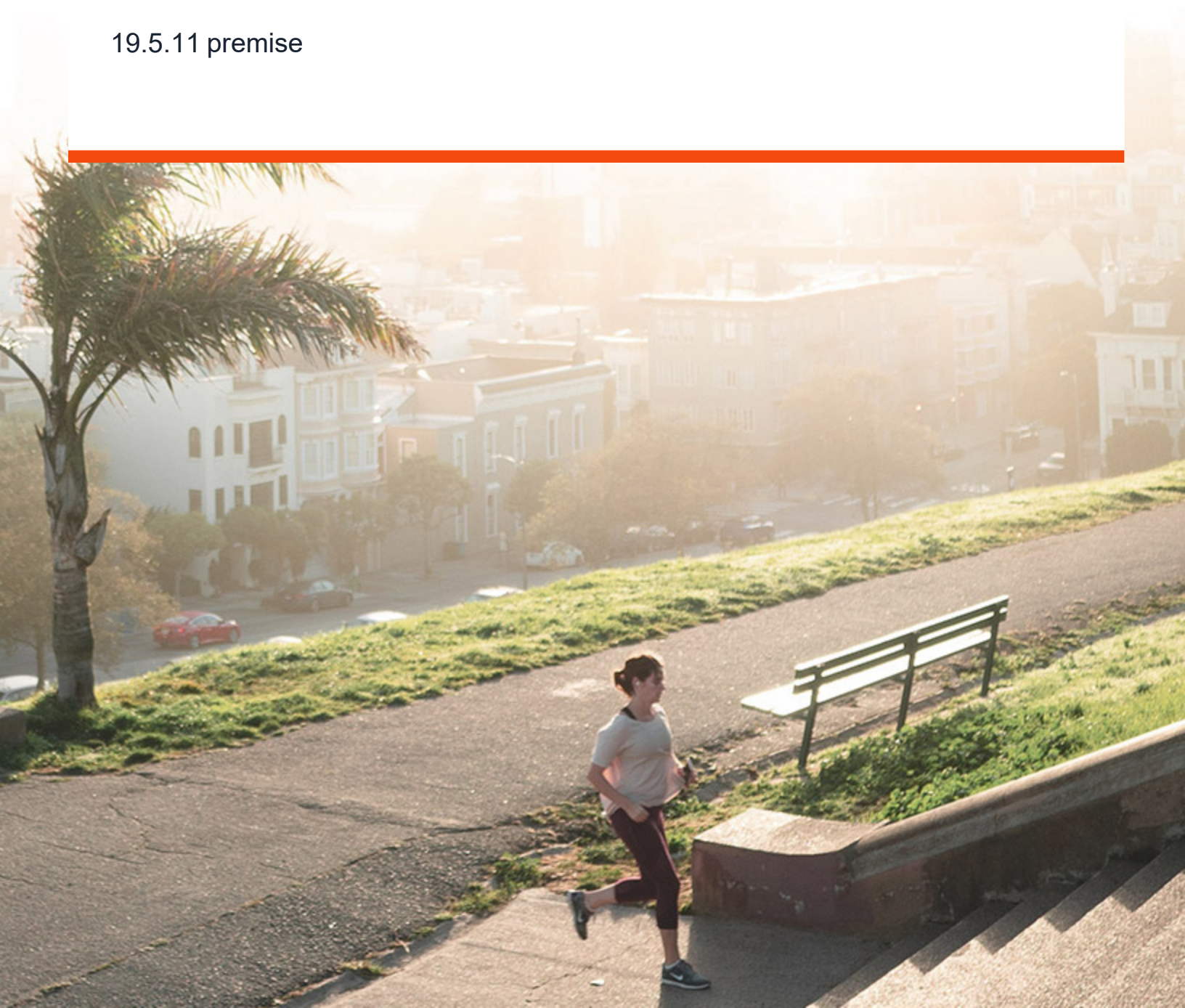




Community Development User Guide

19.5.11 premise



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Introduction to Community Development

Community Development software applications work together to help you streamline department workflows. Community Development enables agencies to automate the management of project development, permitting, code compliance, citizen issues, and business and occupational licenses through its applications. The Community Development applications are:

- Community Development, which includes the following modules:
 - Land Management
 - GIS
 - Projects and Planning
 - Permitting
 - Licensing
 - Code Compliance
 - CRM
 - Entity Management
- Citizen Engagement
- eTRAKiT
- CentralSquare Mobiles
- Interactive Voice Response (IVR)
- Mobile PDA

This user guide focuses on using Community Development and the Community Development modules.

About this guide

This document uses stylistic conventions to enhance your access to information.

Button, tab, menu, and field names appear in bold formatting.

Example: Select **OK**.

Quoted material, emphasized words, and guide names appear in italic formatting.

Example: Location names *must* use the proper format.

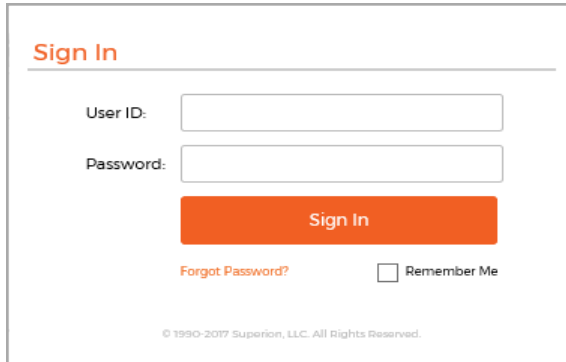
Tips contain noncritical information but are useful notes about special cases or setup-related variables, alternative methods, and benefits or suggested uses of program features.

Tip: Select **Add to Favorites** to add the selected report to your **Favorites** list.

Signing in

To sign in to Community Development, complete these steps:

1. In the **User ID** field, type your user ID. Your user ID is assigned by your system administrator.
2. In the **Password** field, type your password.
3. Select **Sign In**.

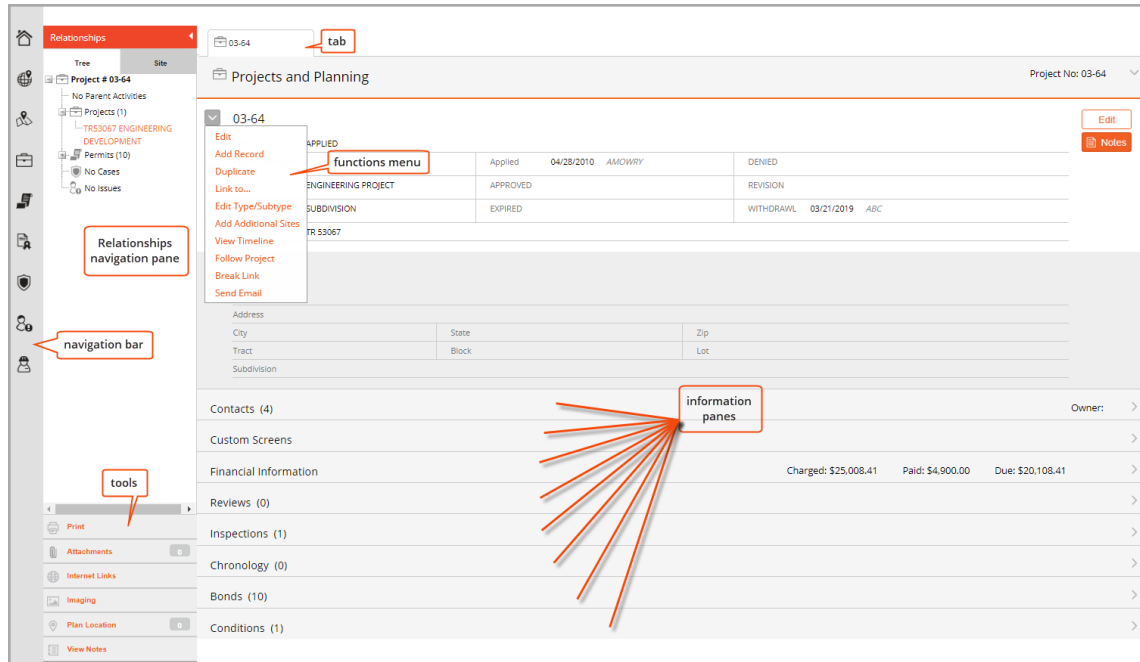


The image shows a 'Sign In' form with the following elements:

- Sign In** (header)
- User ID:** (label) [text input field]
- Password:** (label) [text input field]
- Sign In** (orange button)
- [Forgot Password?](#) (link)
- ☐ **Remember Me** (checkbox and label)
- © 1990-2017 Superior, LLC. All Rights Reserved. (copyright notice)

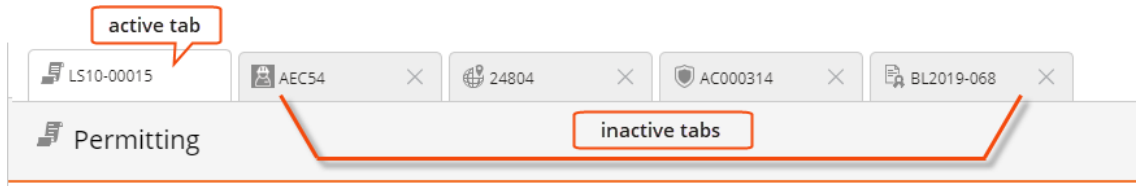
Community Development interface

Community Development offers numerous navigational and functional elements to improve your access to database information. The following diagram illustrates common elements in the user interface (UI):



- Tabs provide quick access to open records.
- Information panes organize record data into functional areas. The available panes vary based on the module.
- Functions menus, sometimes called context menus, provide access to pane-specific functions.
- The **Relationships** pane provides links to related records, search results, and other modules.
- Community Development tools provide quick access to common functions, such as printing documents, adding attachments, and accessing internet links.
- The navigation bar provides quick access to modules in Community Development. To open a module, select the module icon.

Tabs





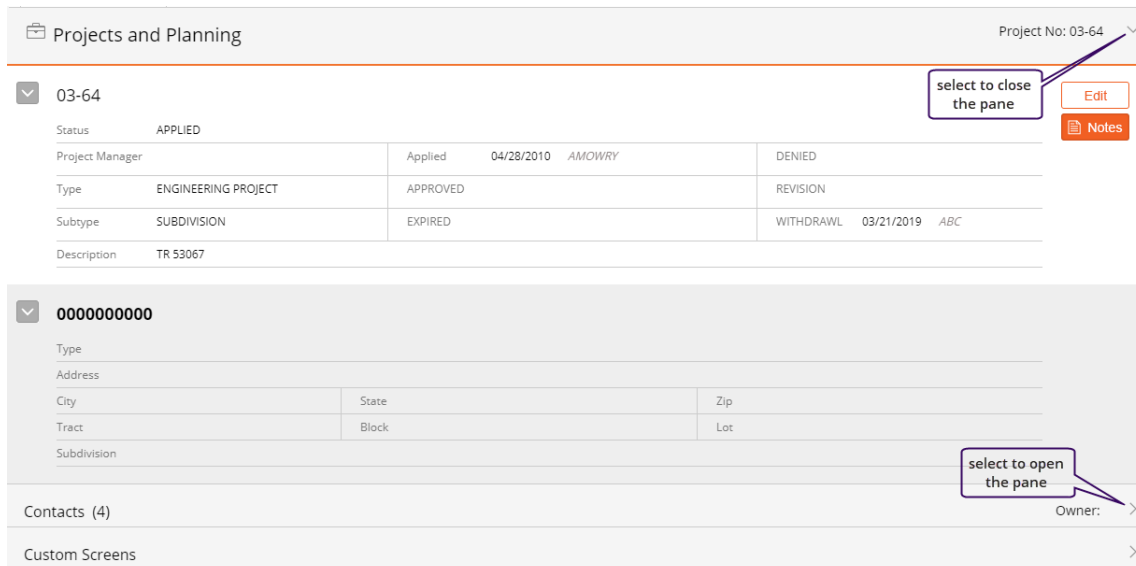
Community Development automatically displays the last five records you viewed. The tab for the active record is always on the left.

Inactive tabs display other open records and appear to the right of the active tab. Select an inactive tab to make it the active tab and view the record.



To close a tab, select . At least one tab must remain open. You cannot close the active tab.

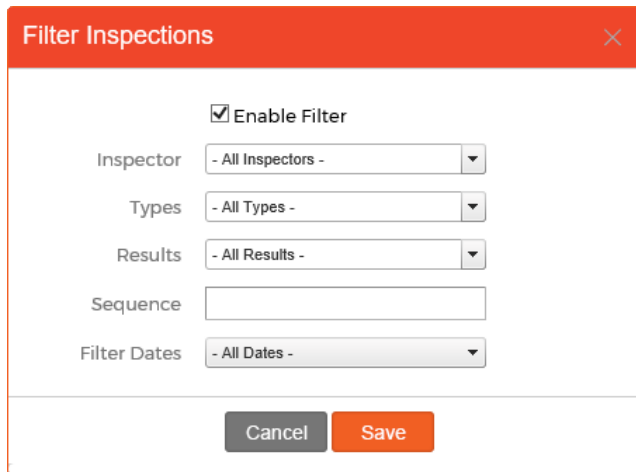
Information panes

Information panes group related fields into sections that are either displayed or hidden. The available panes vary depending on the type of record you are viewing. Select  to expand a pane. Select  to collapse a pane.




Some information panes include filter and sort options:

- Select  to enable filtering and select criteria for narrowing the results shown in the pane. The **Filter** button stays highlighted while the filter is applied. To remove the filter, select  and then clear the **Enable Filter** option.



The 'Filter Inspections' dialog box has a red header with the title 'Filter Inspections' and a close button. It contains the following controls:

- ☒ Enable Filter
- Inspector: - All Inspectors -
- Types: - All Types -
- Results: - All Results -
- Sequence: (empty text field)
- Filter Dates: - All Dates -
- Buttons: Cancel, Save

- Select  to sort the list in the information pane. Options vary depending on the information pane and module.

Additional functions are available in some panes. For example, the **Inspections** pane includes buttons for adding inspections. The **Valuations** pane includes options for adding valuations, applying a model home, and adding model home options.

License data panes

In Entity Management, use the **License Information** pane and **License Types** pane to view, add, and change business license data for entities. Entity Management records can have multiple business licenses, with one license designated as the primary license.

The **License Information** pane includes the following license details and actions for each license on the record:

- In the pane header, **Registration #** and **Expiration**: These fields show the registration number and expiration date from the primary license.
- Agency name: Agency that issued the license. This field is not labeled.
- **License #**: License number assigned by the licensing agency.
- **Issued**: Date the license was issued.
- **Expires**: Date the license expires.
- **Edit**: Select this button to edit the license details.

License Information (3)			Registration #: LICNO218	Expiration: 4/23/2025	
Add Items			Default		
▼	Agency Name				Edit
	License #	LICNO218	Issued	4/23/2020	Expires 4/23/2025
▼	Another Agency				Edit
	License #	LICNO0423	Issued	4/23/2020	Expires 4/23/2025
▼	This Agency				Edit
	License #	20-1234-567	Issued	4/23/2020	Expires 4/23/2025

The **License Information** pane also includes the following features:

- **Add Items:** Select this button to add a license to the record. Complete the fields and then select **Save**.

License

048178

Agency Name

License #

Primary License

Issued

Today

Expires

Today

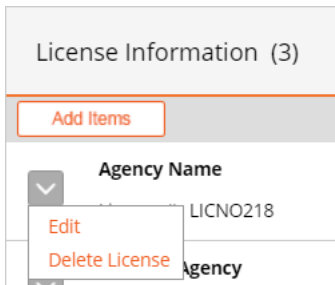
Save

Cancel

- **Sort:** You can sort the license list by license number, issued date, or expires date. By default, the primary license is listed first, followed by additional licenses.

License Information (3)			Registration #: LICNO218	Expiration: 4/23/2025	
Add Items			Default		
▼	Agency Name				
	License #	LICNO218	Issued	4/23/2020	Expires 4/23/2025

- **Functions menu:** From this menu, you can choose to edit or delete licenses.



The **License Types** pane includes the following fields:

- **Types:** If you require a contractor to have a specific license type when applying for certain permits online, that license type must be selected here. You can select up to six license types for an Entity Management record.

License types, as well as the types required for online permit applications, are defined in Web Utilities & Maintenance (WUM).



- **Categories:** Two freeform text fields. Typically these fields are not used unless your agency has defined a use for them.
- **Max Job Value:** If you want to set a maximum job value for this Entity Management record, select a value in this field. The options in the drop-down list are defined in WUM. When the entity applies for a permit or project online, the job value cannot exceed the value in the **Max Job Value** field.

License Types




License Types			
Types	ELECTRIC	Categories	category 1
	PLUMBING		category 2
	MECHANICAL		
	ELECTRIC	Max Job Value	
	PLUMBING		
	MECHANICAL		

Personally identifiable information (PII)

Federal Employer Identification Numbers (FEIN) and Social Security numbers (SSN) in the **FEIN or SSN** field are masked on the Licensing and Entity Management main information panes. Also, depending on your Web Utilities & Maintenance (WUM) settings, additional Licensing fields might be masked.

Masked fields appear as dots rather than characters. Users with appropriate privileges can view the value in a masked field by selecting  and then mask the value by selecting . When you unmask

the value, if the field is blank, **N/A** appears.

License Information				
1805-0001				
Status	UNDER REVIEW	Licensee Name		
Type	HOTEL MOTEL	FEIN or SSN	N/A	
SubType	5 SSN		*****	
4 CLASSIFICATION CODE	7 STATE/ LOCAL RESALE ID			
3 SIC CODE	*****	2 TYPE OF OWNERSHIP	*****	

Note: For more information about user privileges and Licensing fields that can be masked, contact your system administrator.

Relationships pane

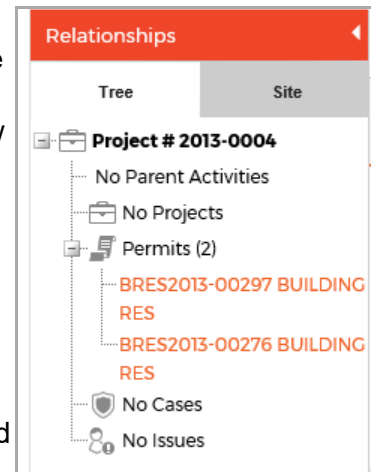
The **Relationships** pane provides links to related records.

Tree tab

The **Tree** tab displays records related to the current record. It represents other activities that are involved in the same process as the record. These related records are not necessarily linked to the same site in the Land Management module. For example, a project for a new development might have a subpermit for a new single family house on one lot in the development.

A permit can be linked to a parent permit, a parent project, subpermits, subcases, and issues.

- A project can be linked to a parent project, subpermits, subcases, and issues.
- A case can be linked to a parent project, a parent permit, cases, and issues.
- An issue can be linked to permits, projects, cases, and issues.
- An Entity Management record can be linked to a parent Entity Management record and sub-Entity Management records.
- An Entity Management record can be associated with permits, projects, code compliance cases, and licenses.



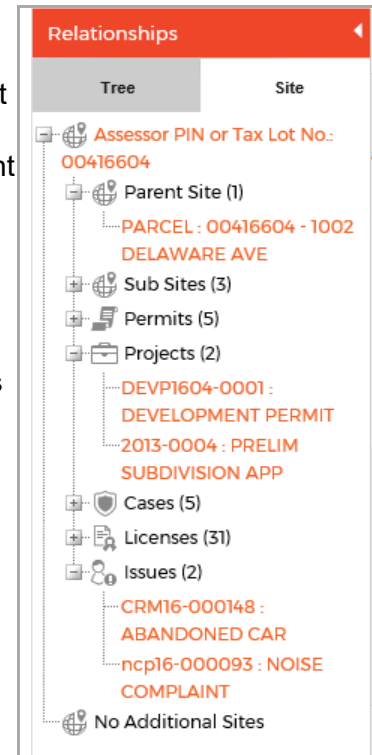
Site tab

The **Site** tab displays records related to the site record in Land Management as well as additional sites to which the current record is linked. It represents activities that involve the same Land Management record as the current record. These records are not necessarily involved in the same process as the record. For example, the site might have a closed permit for the hot tub installed by the previous owners, while the current record might be a permit for a new garage on the same property five years later.

- A permit, project, case, license, or issue might be linked to a site
- A permit, project, case, or license might be linked to additional sites

Using the Tree and Site tabs

1. Locate the permit, project, case, license, issue, or Entity Management record.
2. Select the **Tree** or **Site** tab to view it.
3. On the tab, you can take the following actions:
 - View a list of related records by selecting the plus sign next to a category.
 - Navigate directly to a related record by selecting the record number.
 - Point to a record link to see summary information.



Tip: A plus sign (+) next to a category indicates that it can be expanded; a minus sign (–) indicates that it can be collapsed. If neither icon appears next to a category, the category does not have any related records for that category.

Navigation

The navigation bar at the far left of the UI provides quick access to Workspace and Community Development modules.



Workspace: Opens your customized Workspace, which provides a summary view of recent activity and includes links to frequently used records and information.



Land Management: Opens the Land Management module, which contains comprehensive land data and enables you to view data related to a parcel, subdivision, etc., as well as owner information, and add or link permits, projects, code cases, or licenses to a land record.



GIS: Opens the geographic information system (GIS) tools, which include a dynamic map and tools for identifying land parcels, adding permits and other records to a land parcel, routing inspections, measuring and drawing, saving bookmarks, and more.



Projects and Planning: Opens the Projects and Planning module, which manages the workflow for projects, including applications, reviews, and inspections, and retains project history such as communications and notes.



Permitting: Opens the Permitting module, which manages the workflow and information for permits issued by your agency. Manage contacts, reviews, inspections, financial details, relationships to other permits and projects, and more in this module.



Licensing: Opens the Licensing module, which issues and tracks licenses such as business, animal, and facilities licenses. Licensing records include details about insurance, fees, contacts, and other relevant information.



Code Compliance: Opens the Code Compliance module, which helps you manage incidents and activity related to code enforcement cases. In Code Compliance, you can maintain contact information, attach documents and images, follow multiple violations on a code enforcement case, email notifications, generate notices, and more.



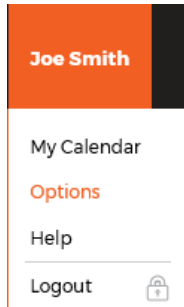
CRM: Opens the CRM module, which provides tools for opening, tracking, managing, and closing Citizen Response Management (CRM) issues.



Entity Management: Opens the Entity Management module, which manages data for contacts such as owners, architects, engineers, and contractors, surveyors, and other professionals who work with your agency. Entity Management records include information about insurance, fees, permits, licenses, and more.

User options

Use the **Options** dialog box to define your email address, customize Workspace, set up favorites links, set options related to inspections and GIS, set search preferences, and change your password.

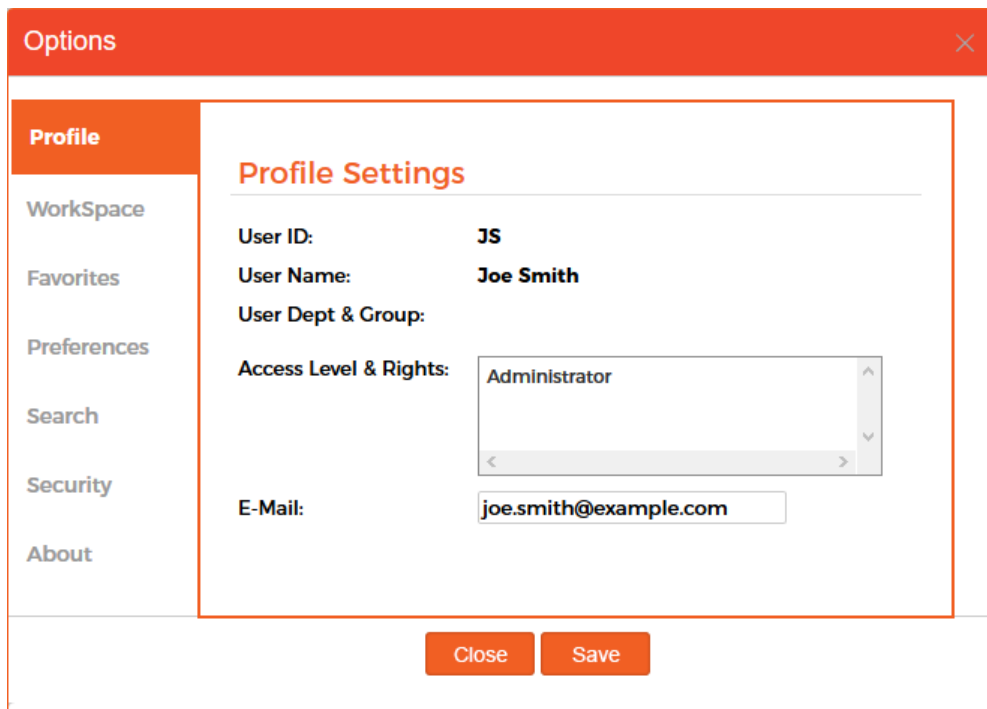


To access the **Options** dialog box, point to your name in the Community Development application header and then select **Options**.

Select options on each page in the dialog box and then select **Save**. If you do not want to save your changes, select **Close**.

Profile

Use the **Profile Settings** page to view information about your profile, and enter or change your email address.

The "Options" dialog box is shown with the "Profile" tab selected. The "Profile Settings" section displays the following information: User ID: JS, User Name: Joe Smith, User Dept & Group: (empty), Access Level & Rights: Administrator (selected in a dropdown menu), and E-Mail: joe.smith@example.com (in a text input field). At the bottom of the dialog are "Close" and "Save" buttons.

Profile Settings	
User ID:	JS
User Name:	Joe Smith
User Dept & Group:	
Access Level & Rights:	Administrator
E-Mail:	joe.smith@example.com

Details in the **Access Level & Rights** field vary based on your access level. If you are assigned the **ADMINISTRATOR** or **OBSERVER** access level, **Administrator** or **Observer** appears in this field. For more information about your privileges, contact your system administrator.

Email

Community Development uses the email address you define in the **Options** dialog box to send email from you to Community Development contacts directly from the Community Development application. Depending on your setup, the application might send certain email messages automatically.

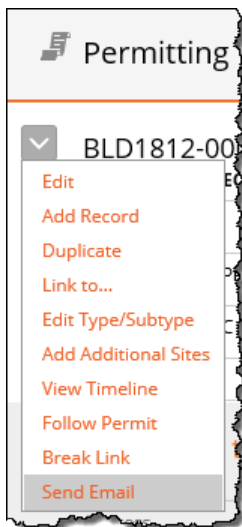
You can send email manually from a record's main information pane or **Contacts** panes by using the functions menu. Alternatively, you can select an email address in any pane.

Note: Community Development does not keep a record of email that has been sent. Instead, copies are sent to the email addresses that you define in your user email setup. If you want to add the email as an attachment or save a note or chronology action to the record, you must perform those actions manually.

To use the **Send Email** function, complete the following steps:

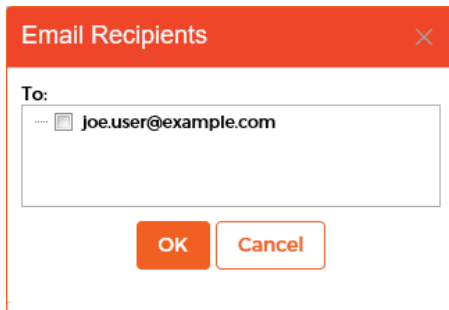
Note: Before you use this feature, add email addresses for any contacts you want to email.

1. Navigate to the activity record in Land Management, Projects and Planning, Permitting, Licensing, Code Compliance, CRM, or Entity Management.
2. Point to the functions menu and select **Send Email**.



3. In the **To** field, select all the email addresses you want to send the email to. The list includes all of the record's contacts that have an email address defined. If you want to send the email

to someone other than a contact on the record, do not select any email addresses.

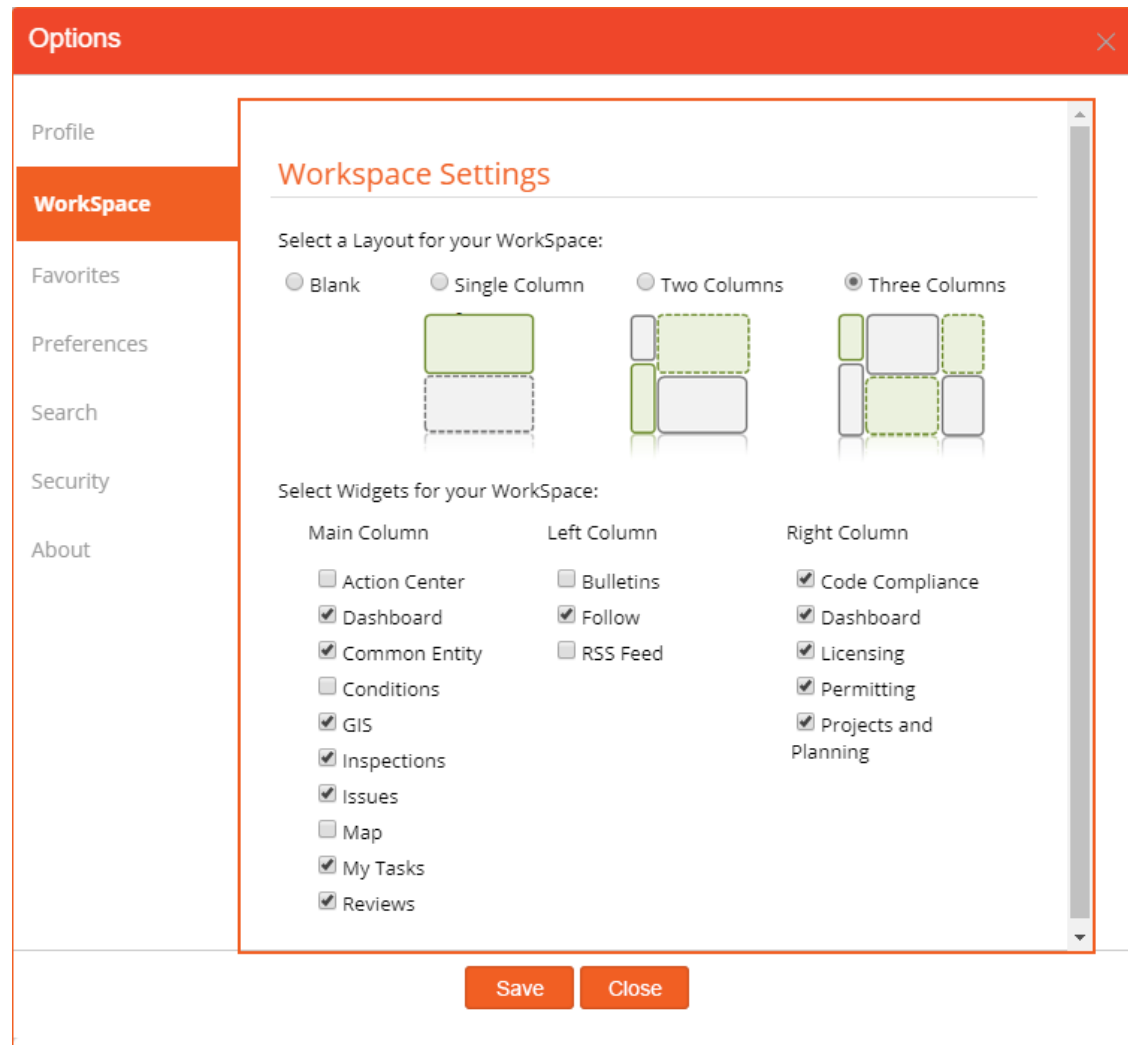
A screenshot of a dialog box titled "Email Recipients" with a red header bar and a close button (X) in the top right corner. Below the header, there is a "To:" label followed by a text input field containing the email address "joe.user@example.com". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

4. Select **OK**. A draft email is opened in your default email application. The **To** field in the email shows the users you selected. The **Subject** field reflects the activity record number and the site address (if applicable). You can change these fields if you want to.
5. Enter the email message and then send the email. Depending on the settings in your default email application, the email is saved in your email application as a sent item.

Note: Community Development does not save any record of the sent email. If you want to add the email as an attachment, or save a note or chronology action to the record, you must complete those actions manually.

Workspace

Use the **Workspace Settings** page to customize the appearance of your Workspace. Workspace provides a central location from which you can perform your daily activities and review key information. After you log in to Community Development, Workspace appears.



Options

Profile

WorkSpace

Favorites

Preferences

Search

Security

About

Workspace Settings

Select a Layout for your WorkSpace:

☐ Blank ☐ Single Column ☐ Two Columns ☒ Three Columns

Select Widgets for your WorkSpace:

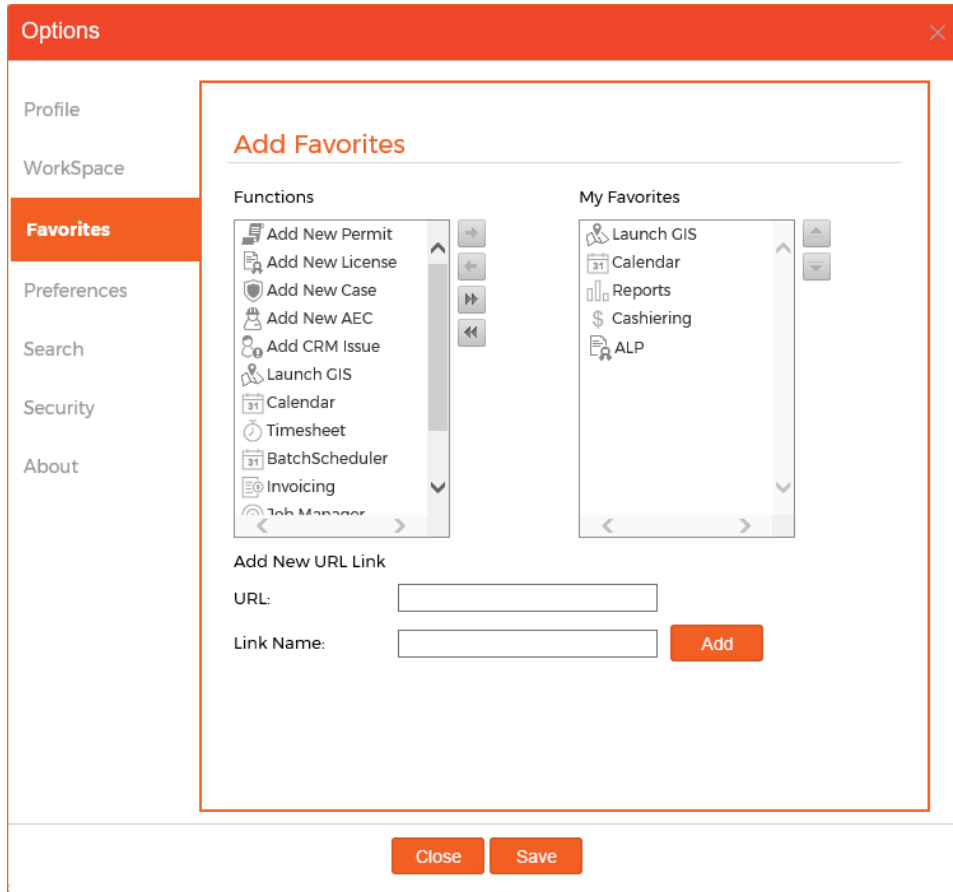
Main Column	Left Column	Right Column
<input type="checkbox"/> Action Center	<input type="checkbox"/> Bulletins	<input checked="" type="checkbox"/> Code Compliance
<input checked="" type="checkbox"/> Dashboard	<input checked="" type="checkbox"/> Follow	<input checked="" type="checkbox"/> Dashboard
<input checked="" type="checkbox"/> Common Entity	<input type="checkbox"/> RSS Feed	<input checked="" type="checkbox"/> Licensing
<input type="checkbox"/> Conditions		<input checked="" type="checkbox"/> Permitting
<input checked="" type="checkbox"/> GIS		<input checked="" type="checkbox"/> Projects and Planning
<input checked="" type="checkbox"/> Inspections		
<input checked="" type="checkbox"/> Issues		
<input type="checkbox"/> Map		
<input checked="" type="checkbox"/> My Tasks		
<input checked="" type="checkbox"/> Reviews		

Save **Close**


On the **Workspace Settings** page, select the layout you want for Workspace. You can choose blank (no information panes), one (single) column, two columns, or three columns. Then select the information panes you want to see in each area. For details about each available information pane, see [Using Workspace](#).


Favorites



Use the **Add Favorites** page to add, remove, and reorder links to frequently used areas in Community Development and websites.




The screenshot shows the 'Options' dialog box with the 'Favorites' tab selected in the sidebar. The main content area is titled 'Add Favorites' and contains two lists: 'Functions' and 'My Favorites'. The 'Functions' list includes items like 'Add New Permit', 'Add New License', 'Add New Case', 'Add New AEC', 'Add CRM Issue', 'Launch GIS', 'Calendar', 'Timesheet', 'BatchScheduler', 'Invoicing', and 'Job Manager'. The 'My Favorites' list includes 'Launch GIS', 'Calendar', 'Reports', 'Cashiering', and 'ALP'. Between the lists are arrows for moving items. Below the lists is a section for 'Add New URL Link' with input fields for 'URL:' and 'Link Name:', and an 'Add' button. At the bottom of the dialog are 'Close' and 'Save' buttons.

To add items to your **Favorites** list, select the item in the **Functions** list and then select .

To remove items from your **Favorites** list, select the item in the **My Favorites** list and then select .

To reorder items in your **Favorites** list, select the item you want to move and then use  to move the item up or  to move the item down.

To add all functions to the **My Favorites** list, select . To remove all items from the **My Favorites** list, select .

To access the favorites you set up, point to **Favorites** in the Community Development application header.

Note: Depending on your agency's settings and your user privileges, some **Favorites** options might not be available to you.

Preferences

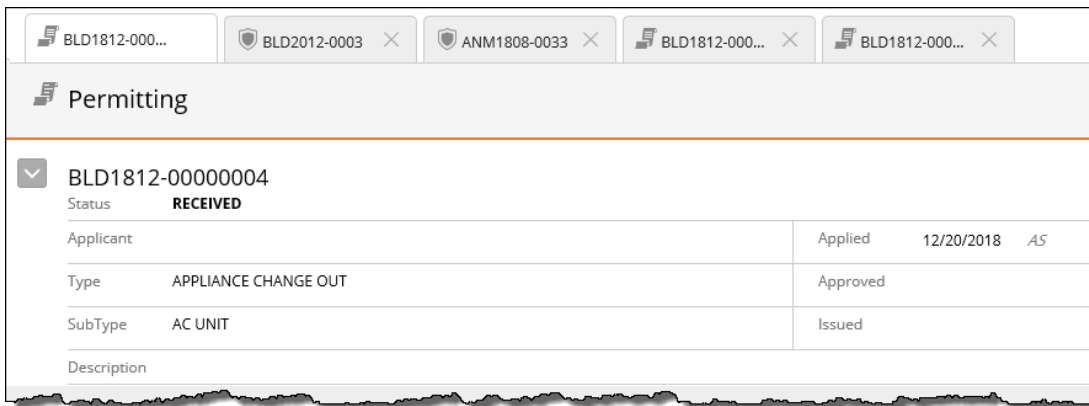
This page includes the following tabs:

- [General](#)
- [Inspection](#)
- [Calendar](#)
- [Review](#)

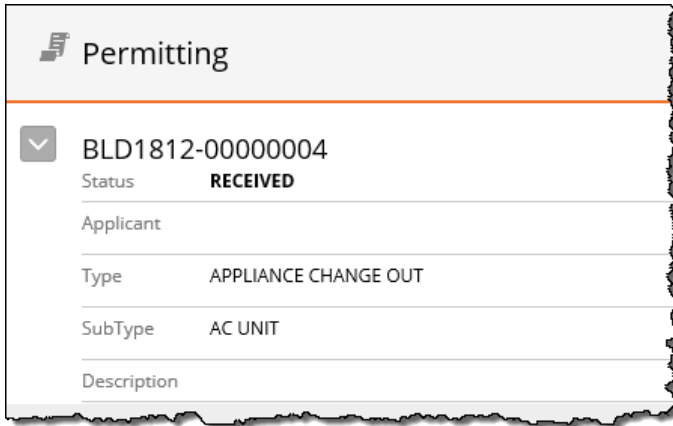
General

Use the General Preferences page to:

- Define beginning and ending addresses for routing in GIS.
For more information about routing, see [Route Inspections tool](#).
- Enable or disable the Tabs feature. If this feature is enabled, tabs appear for the last five records you viewed.



If you disable this feature, only the current record appears.

 Permitting

▼

BLD1812-00000004

Status

RECEIVED

Applicant

Type

APPLIANCE CHANGE OUT

SubType

AC UNIT

Description

- Indicate whether to show Workspace or last work area when Community Development opens.
- Reset preferences to default settings.

Options

Profile

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About

General

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Calendar

Review

Default Start Location (GIS):

Default End Location (GIS):

Show Module Tabs:

☒

Start Application In:

☒ Workspace ☐ Last Work Area

Reset Preferences:

Reset

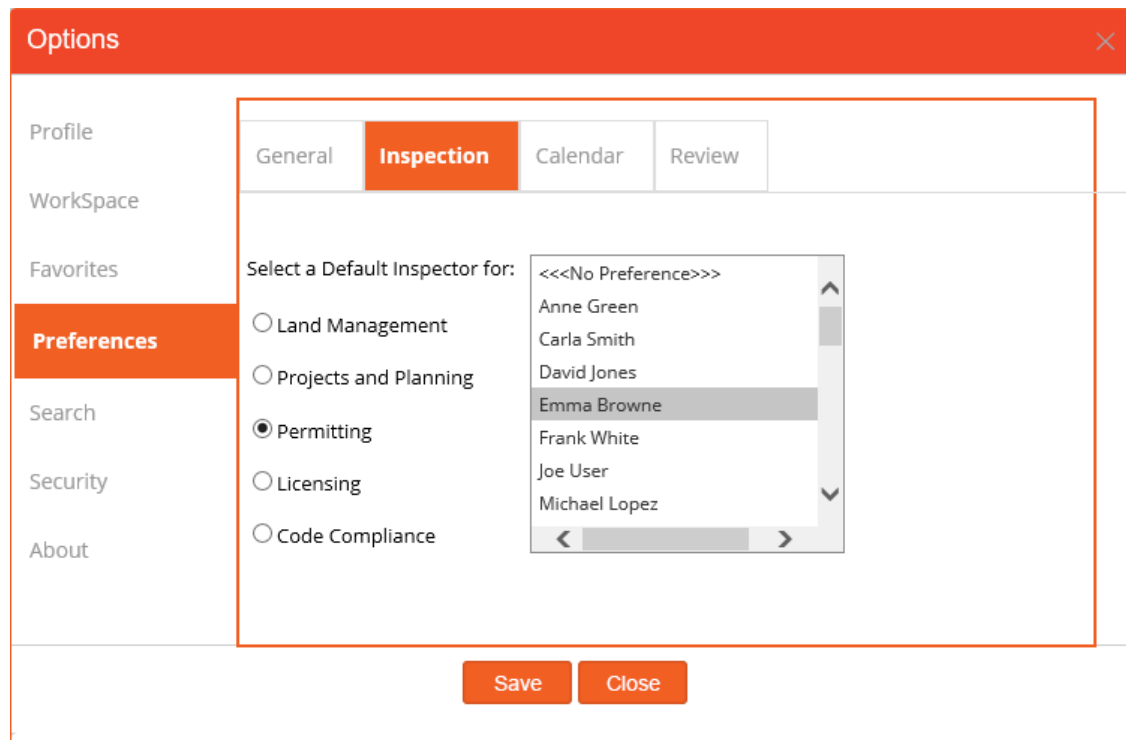
Close

Save

Inspection

Use this tab to select a default inspector for each module that supports inspections. This inspector is selected by default when you add an inspection, but you can change the inspector if needed.

Select a module and then select the default inspector for that module. Select another module and then select the default inspector for that module. Continue until you have selected a default inspector for each module. To use the default inspector for an inspection type, select **No Preference**.



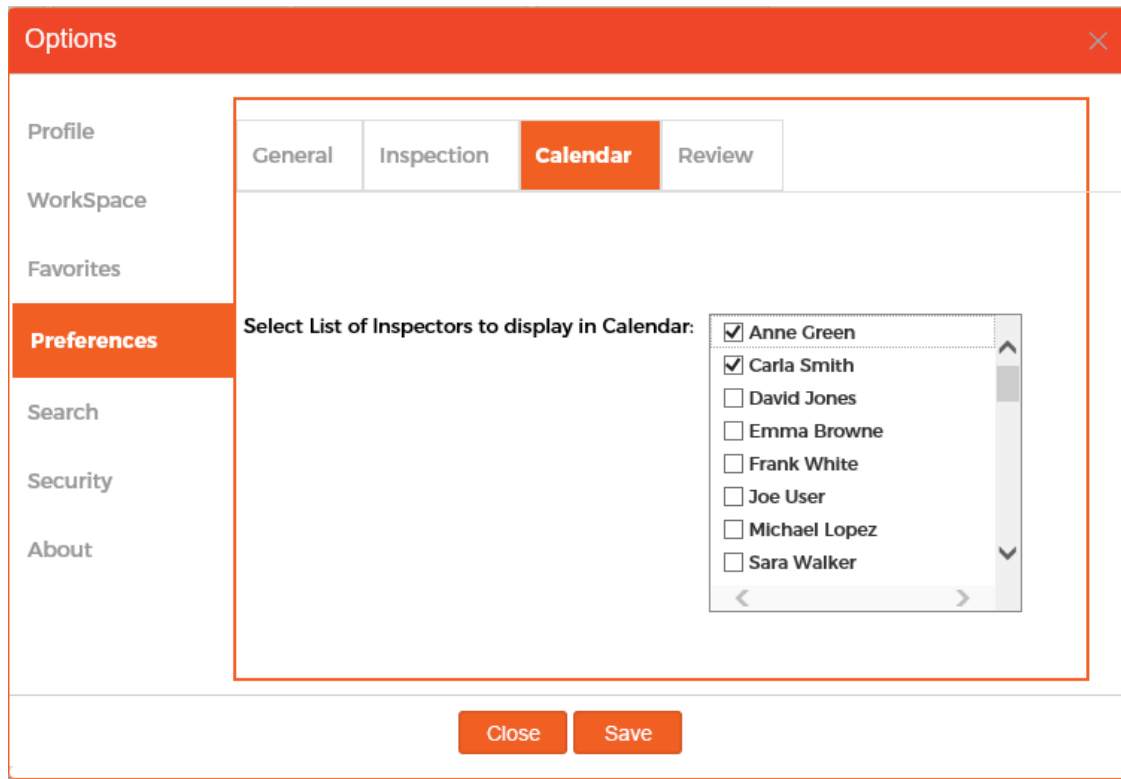
The screenshot shows the 'Options' dialog box with the 'Inspection' tab selected. The left sidebar contains links to Profile, WorkSpace, Favorites, Preferences (highlighted), Search, Security, and About. The main area has tabs for General, Inspection, Calendar, and Review. Under the 'Inspection' tab, there is a section 'Select a Default Inspector for:' with radio buttons for Land Management, Projects and Planning, Permitting (selected), Licensing, and Code Compliance. A dropdown menu is open, showing a list of users: <<<No Preference>>>, Anne Green, Carla Smith, David Jones, Emma Browne (highlighted), Frank White, Joe User, and Michael Lopez. At the bottom are 'Save' and 'Close' buttons.

Calendar

Use this tab to define the users who are listed on your Community Development calendar.

Tip: For more information about the Calendar feature, see [Using the calendar](#).

Select all users whose schedule you want to be able to see.



Options

Profile
WorkSpace
Favorites
Preferences
Search
Security
About

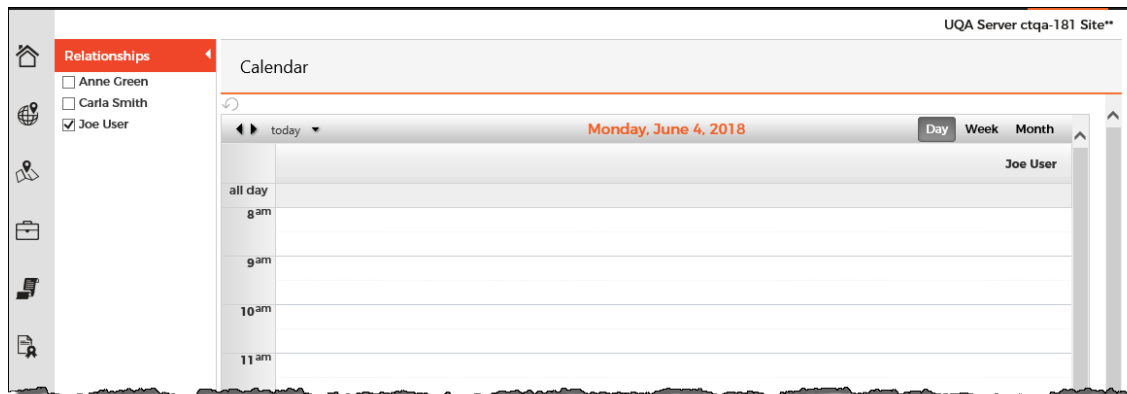
General Inspection **Calendar** Review

Select List of Inspectors to display in Calendar:

- ☒ Anne Green
- ☒ Carla Smith
- ☐ David Jones
- ☐ Emma Browne
- ☐ Frank White
- ☐ Joe User
- ☐ Michael Lopez
- ☐ Sara Walker

Close Save

In your calendar (accessed from **Favorites**), the users you selected are listed in the **Relationships** pane.



UQA Server ctqa-181 Site**

Relationships

- ☐ Anne Green
- ☐ Carla Smith
- ☒ Joe User

Calendar

today Monday, June 4, 2018 Day Week Month

all day 8 am 9 am 10 am 11 am

Joe User

Review

Use this tab to select a default reviewer for each module that supports reviews. This reviewer is selected by default when you add a review, but you can change the reviewer if needed.

Select a module and then select the default reviewer for that module. Select another module and then select the default reviewer for that module. Continue until you have selected a default reviewer

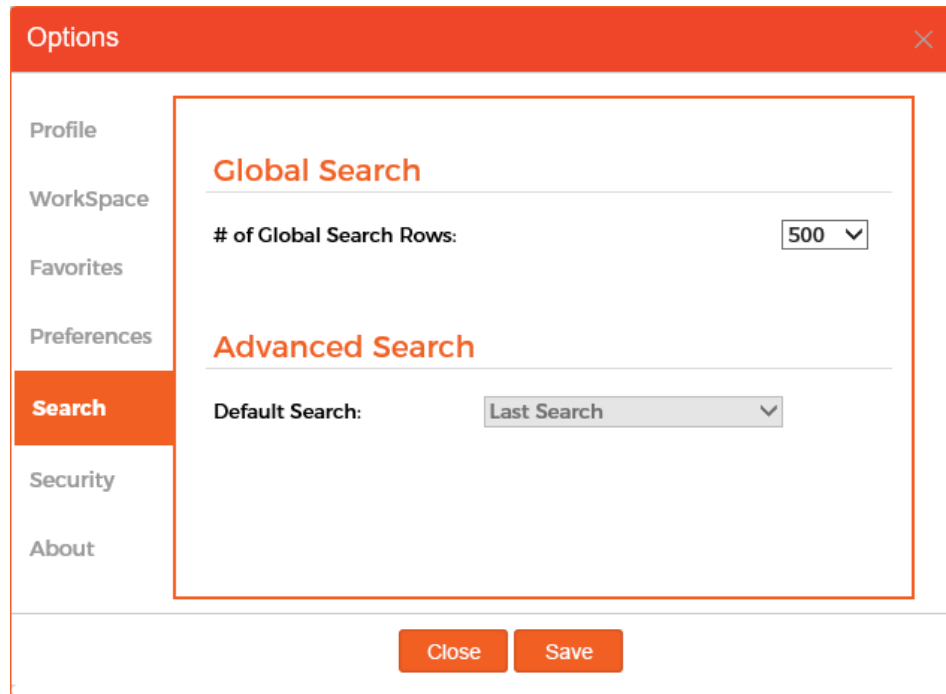
for each module. To use the default inspector for a review type, select **No Preference**.

The screenshot shows the 'Options' dialog box with the 'Preferences' tab selected. The 'Review' sub-tab is active. Under 'Select a Default Reviewer for', the 'Permitting' radio button is selected. A dropdown menu is open, showing a list of users: '<<<No Preference>>>', 'Anne Green', 'Carla Smith', 'David Jones', 'Emma Browne', 'Frank White', 'Joe User', and 'Michael Lopez'. The 'Save' and 'Close' buttons are at the bottom.

Search

Use these options to set the following search preferences:

- **# of Global Search Rows:** Select the default maximum number of results returned when you perform a global search.
- **Default Search:** Currently this option is not used.



Options

Profile

WorkSpace

Favorites

Preferences

Search

Security

About

Global Search

of Global Search Rows: 500 ▼

Advanced Search

Default Search: Last Search ▼

Close Save

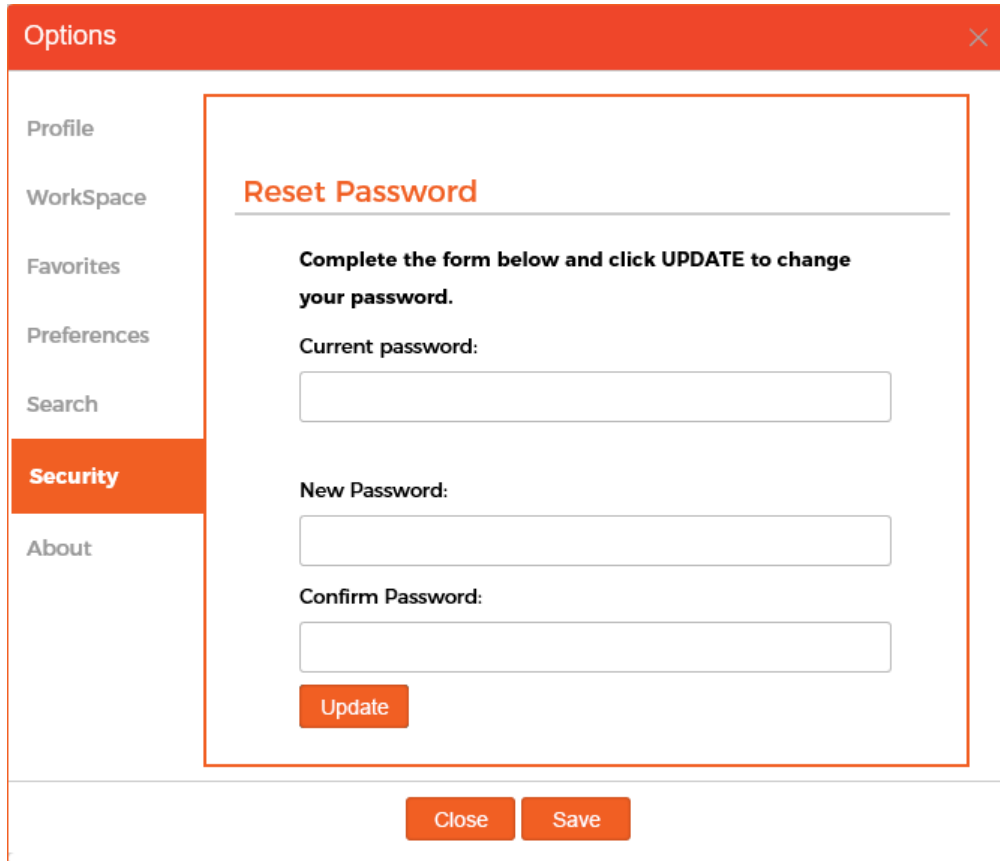
Security

Use the **Reset Password** page to change your password.

Password requirements are defined by your agency and might include:

- A minimum and/or maximum length
- At least one uppercase letter
- At least one lowercase letter
- At least one number
- At least one special character

In addition, Community Development restricts users from setting commonly used passwords. For example, *Password123!* is not allowed.



The screenshot shows a web application interface with a sidebar menu on the left and a main content area. The sidebar menu includes links for Profile, WorkSpace, Favorites, Preferences, Search, Security (highlighted in orange), and About. The main content area displays a 'Reset Password' form. The form has a title 'Reset Password' in orange, followed by instructions: 'Complete the form below and click UPDATE to change your password.' Below the instructions are three input fields: 'Current password:', 'New Password:', and 'Confirm Password:'. An orange 'Update' button is positioned below the 'Confirm Password' field. At the bottom of the dialog box, there are two buttons: 'Close' and 'Save'.

Options

Profile

WorkSpace

Favorites

Preferences

Search

Security

About

Reset Password

Complete the form below and click **UPDATE** to change your password.

Current password:

New Password:

Confirm Password:

Update

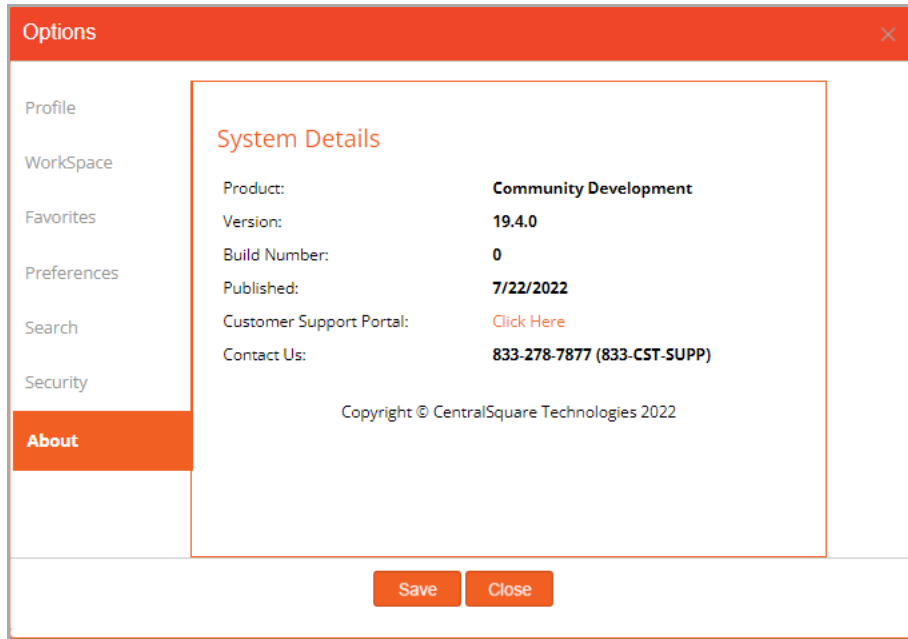
Close Save

To change your Community Development password:

1. Enter your current password.
2. Enter your new password.
3. Enter your new password again in the **Confirm Password** field.
4. Select **Update**.

About

Use the **System Details** page to view information about the Community Development application and access the customer support portal.



Using Workspace

Workspace provides a central location from which you can perform your daily activities and review key information. After you log in to Community Development, Workspace appears. Workspace can include the following panes:

- [Action Center \(page 33\)](#)
- [Dashboard \(page 29\)](#) (can appear in the center, on the right, or both)
- [Entity Migrations](#)
- [Conditions \(page 36\)](#)
- [GIS \(page 32\)](#)
- [Inspections \(page 38\)](#)
- [Issues \(page 37\)](#)
- [Map \(page 32\)](#)
- [My Tasks \(page 41\)](#)
- [Reviews \(page 40\)](#)
- [Bulletins \(page 29\)](#)
- [Follow \(page 29\)](#)
- [RSS \(Really Simple Syndication\) feed \(page 32\)](#)
- [Code Compliance \(page 25\)](#)
- [Licensing \(page 26\)](#)
- [Permits \(page 27\)](#)
- [Projects and Planning \(page 28\)](#)

You can customize which panes appear on your Workspace by selecting information panes in **Options > WorkSpace**. For more information, see [Workspace](#).

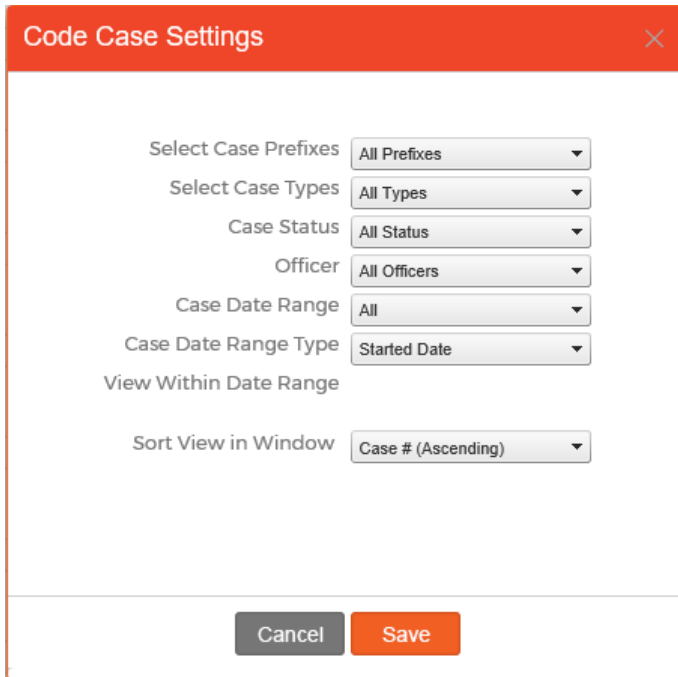
Tip: In Workspace, you can drag panes within a column to customize the order of panes.

Code Compliance

In the **Code Compliance** pane, an address in red text indicates an overdue case.

To customize the **Code Compliance** pane, complete the following steps:

1. Select .



The **Code Case Settings** dialog box is shown. It has a red header bar with the title and a close button. The main area contains several settings, each with a label and a dropdown menu:

- Select Case Prefixes**: All Prefixes
- Select Case Types**: All Types
- Case Status**: All Status
- Officer**: All Officers
- Case Date Range**: All
- Case Date Range Type**: Started Date
- View Within Date Range**: (no dropdown)
- Sort View in Window**: Case # (Ascending)

At the bottom are two buttons: **Cancel** and **Save**.

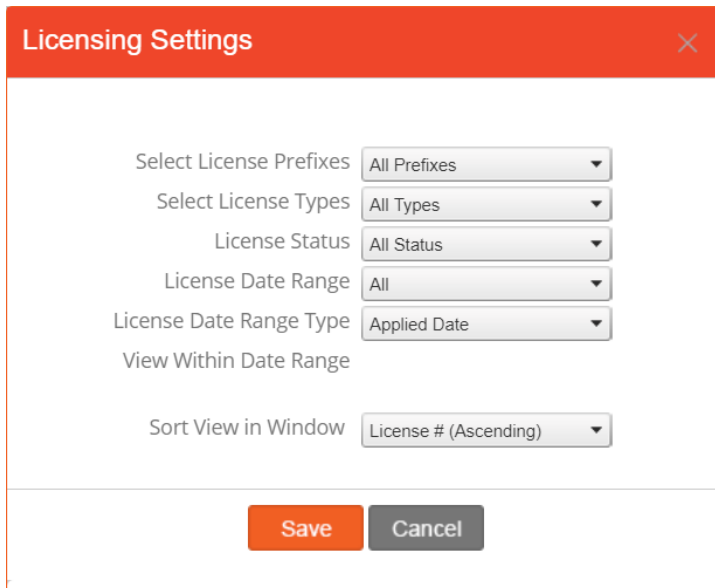
2. In the **Select Case Prefixes** drop-down list, select one or more code case prefixes. Only code cases with the selected prefixes will appear in your Workspace.
3. In the **Select Case Types** drop-down list, select one or more case types. Only code cases of these types will appear in your Workspace. To see all code cases, select **All Types**.
4. In the **Case Status** drop-down list, select one or more statuses. Only code cases with the selected statuses will appear in your Workspace.
5. In the **Officer** drop-down list, select one or more officers. Only code cases with the selected officers will appear in your Workspace.
6. In the **Case Date Range** drop-down list, select a date range to use. Depending on your selection, you might need to specify a date range in the **View Within Date Range** fields. Only code cases with a date within this range will appear in your Workspace.
7. In the **Case Date Range Type** drop-down list, select the date field you want to use for filtering (for example, last action date or closed date).
8. In the **Sort View in Window** field, select how you want your cases sorted.

9. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

Licensing

To customize the **Licensing** pane, complete the following steps:

1. Select .



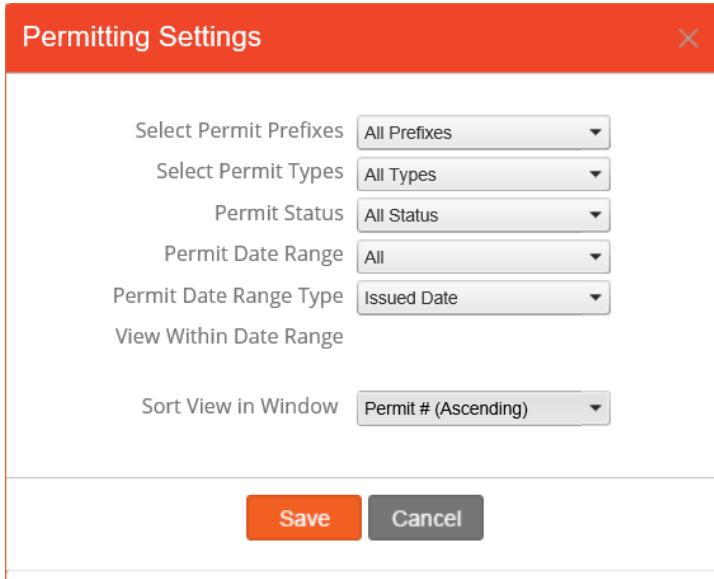
The image shows a 'Licensing Settings' dialog box with a red header bar containing the title and a close button. The main area contains several settings, each with a label and a dropdown menu: 'Select License Prefixes' (All Prefixes), 'Select License Types' (All Types), 'License Status' (All Status), 'License Date Range' (All), 'License Date Range Type' (Applied Date), and 'View Within Date Range' (empty). At the bottom, there is a 'Sort View in Window' dropdown set to 'License # (Ascending)'. At the very bottom are two buttons: 'Save' (orange) and 'Cancel' (gray).

2. In the **Select Prefixes** drop-down list, select one or more license prefixes. Only licenses with the selected prefixes will appear in your Workspace.
3. In the **Select License Types** drop-down list, select one or more license types. Only licenses of these types will appear in your Workspace.
4. In the **License Status** drop-down list, select one or more statuses. Only licenses with the selected statuses will appear in your Workspace.
5. In the **License Date Range** drop-down list, select a date range to use. Depending on your selection, you might need to specify a date range in the **View Within Date Range** fields. Only licenses with a date within this range will appear in your Workspace.
6. In the **License Date Range Type** drop-down list, select the date field you want to use for filtering (for example, applied date or expired date).
7. In the **Sort View in Window** field, select how you want licenses sorted.
8. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

Permits

To customize the **Permits** pane, complete the following steps:

1. Select .

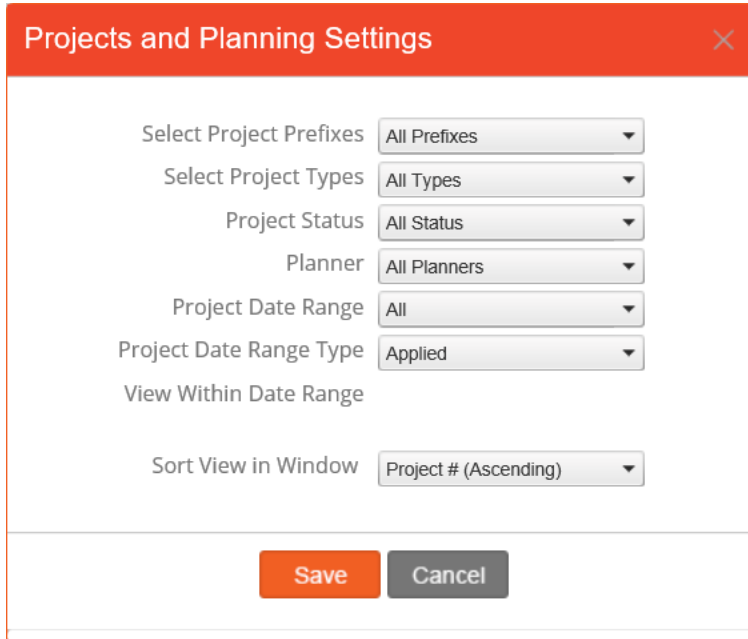
A dialog box titled "Permitting Settings" with a red header bar and a close button (X) in the top right corner. The dialog contains several dropdown menus for filtering permits. The first five dropdowns are grouped together: "Select Permit Prefixes" (All Prefixes), "Select Permit Types" (All Types), "Permit Status" (All Status), "Permit Date Range" (All), and "Permit Date Range Type" (Issued Date). Below these is a label "View Within Date Range" followed by a text input field. At the bottom, there is a "Sort View in Window" dropdown menu set to "Permit # (Ascending)". At the very bottom of the dialog are two buttons: "Save" (orange) and "Cancel" (gray).

2. In the **Select Permit Prefixes** drop-down list, select one or more permit prefixes. Only permits with the selected prefixes will appear in your Workspace.
3. In the **Select Permit Types** drop-down list, select one or more permit types. Only permits of these types will appear in your Workspace.
4. In the **Permit Status** drop-down list, select one or more statuses. Only permits with the selected statuses will appear in your Workspace.
5. In the **Permit Date Range** drop-down list, select a date range to use. Depending on your selection, you might need to specify a date range in the **View Within Date Range** fields. Only permits with a date within this range will appear in your Workspace.
6. In the **Permit Date Range Type** drop-down list, select the date field you want to use for filtering (for example, applied date or expired date).
7. In the **Sort View in Window** field, select how you want permits sorted.
8. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

Projects and Planning


To customize the **Projects and Planning** pane, complete the following steps:

1. Select .



2. In the **Select Project Prefixes** drop-down list, select one or more project prefixes. Only projects with the selected prefixes will appear in your Workspace.
3. In the **Select Project Types** drop-down list, select one or more project types. Only projects of these types will appear in your Workspace.
4. In the **Project Status** drop-down list, select one or more statuses. Only projects with the selected statuses will appear in your Workspace.
5. In the **Project Date Range** drop-down list, select a date range to use. Depending on your selection, you might need to specify a date range in the **View Within Date Range** fields. Only projects with a date within this range will appear in your Workspace.
6. In the **Project Date Range Type** drop-down list, select the date field you want to use for filtering (for example, applied date or expired date).
7. In the **Sort View in Window** field, select how you want projects sorted.
8. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

Bulletins




Use bulletins to display Community Development-wide information. Select  to choose a sort order for the **Bulletins** pane or to add a bulletin.

Dashboard



Dashboard provides at-a-glance access to Community Development data through live charts.

The **Dashboard** pane can appear in the middle column, the right column, or both columns, depending on your selections in user options.

To customize the **Dashboard** pane, complete the following steps:

1. Select .
2. Select the charts and graphs you want to see.
3. Define the order of the charts and graphs by selecting an item and then selecting  to move an item up in the list or  to move an item down in the list.
4. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

You can perform the following actions from the **Dashboard** pane:

- To scroll through the charts, select  and .
- To change the date range of the data in the chart, select the date range drop-down list below the chart.
- To display the title and total for a segment of the chart, point to that segment.

Follow

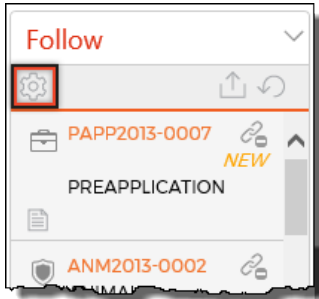
Use the Follow feature to maintain a list of records you frequently access or need to check on.

Depending on your WUM settings, a **NEW** indicator appears on records in the **Follow** pane when the record is updated.

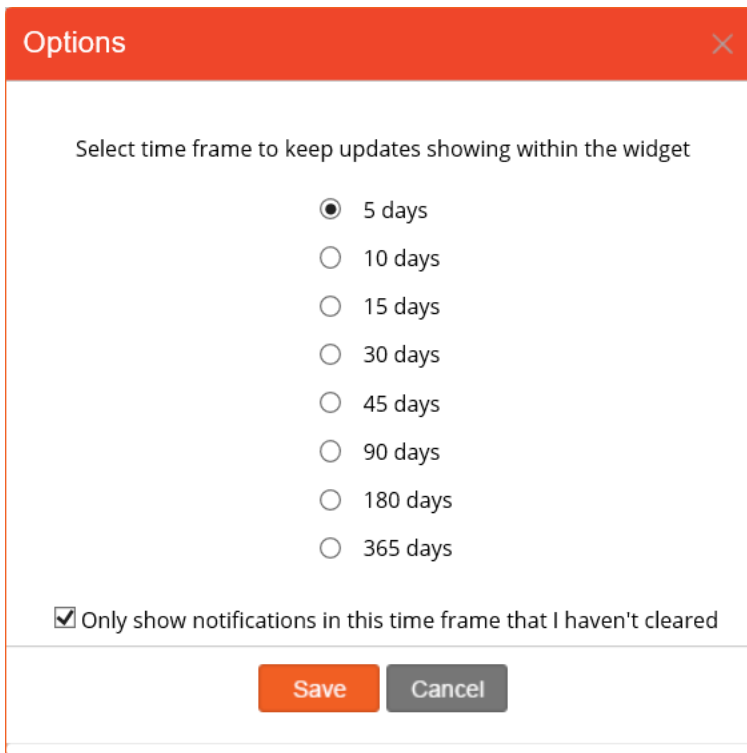
Configuring Follow

To customize the **Follow** pane, complete the following steps:

1. Select .



2. Select a time frame. The time frame determines how long the **NEW** indicator appears in the **Follow** pane.

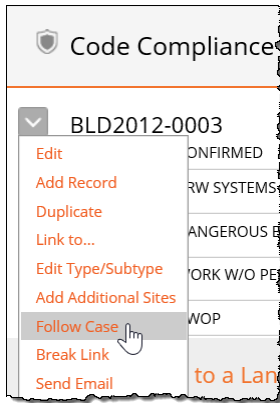


3. If you want to be able to clear the **NEW** indicator after you review updates, select the **Only show notifications in this time frame that I haven't cleared** option.
4. Select **Save** to save your settings or select **Cancel** to close the dialog box without saving changes.

Following a record

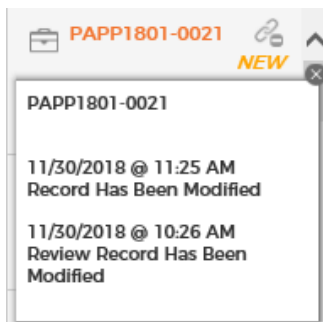
To follow a record, complete the following steps:


1. Go to the record. For more information about searching for a record, see [Locating records](#).
2. On the functions menu, select **Follow**. This adds the record to your Follow list.



Note: The menu option varies by module. For example, in Code Compliance, the option is **Follow Case**. In Land Management, the option is **Follow Land Management Record**.


3. Depending on your agency's WUM settings, the **NEW** indicator appears on the record in the **Follow** pane. Point to the word **NEW** or the record number to view a pop-up window with a description of recent changes to the record and the related address.



4. Select  to close the pop-up window.

Stop following a record

Use one of the following methods to stop following a record.

- In the Workspace **Follow** pane, select  for the record you no longer want to follow.
- Go to the record. From the functions menu, select **Un-Follow**.

Note: The menu option varies by module. For example, in Land Management, the option is **Un-Follow Land Management Record**. In Permitting, the option is **Un-Follow Permit**.

GIS

Use the **GIS** pane to select an object (such as a parcel, building, or hydrant), view the record information, and attach a new activity record to an object.

To add a record to a GIS object, complete the following steps:


1. Locate the GIS object by navigating on the map.
2. Select the GIS object.
3. Select **Add**.
4. In the **Create New** field, select the type of record to create from. The **Add Record** screen changes based on your selection.

Note: The following steps might not be required.

5. Select a record type from the **Record Type** field.
6. Select a record subtype from the **Record Subtype** field.
7. Select a prefix from the **Prefix** field.
8. In the **Description** field, enter a brief description.
9. In the **Number of Records** field, select the number of records to add. Use this feature to add and attach multiple records to the selected GIS object.
10. Select **Add**.

RSS (Really Simple Syndication) feed

To customize the **RSS Feed** pane, complete the following steps:

1. Select .
2. Enter the RSS URL.
3. Select **Save** to save your changes. Select **Cancel** to close the dialog box without saving changes.

Map

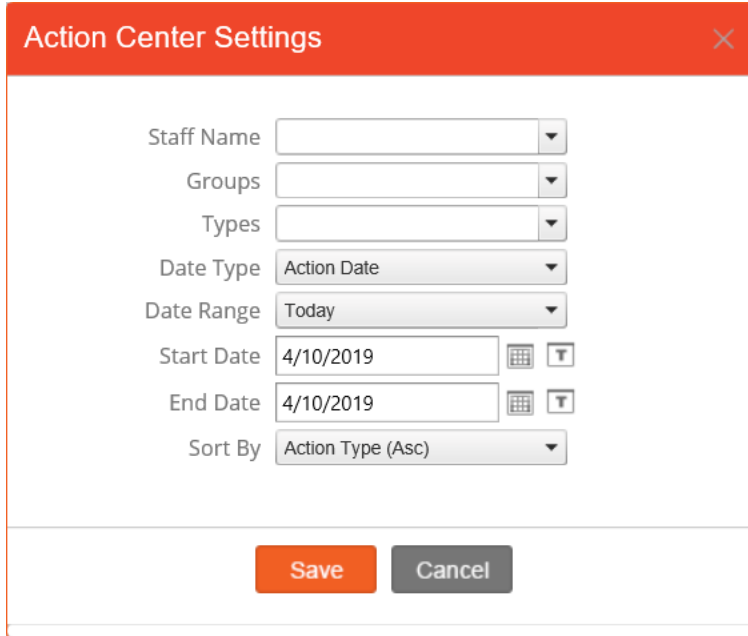
The **Map** pane provides access to Google Maps. Select a location on the map to search for records attached to that address. Use the controls on the map to zoom in, zoom out, and switch between map and satellite views.

Action Center

The **Action Center** pane provides a central location where you can view and edit chronology actions on any permit, project, case, or license.

To customize the **Action Center** pane, complete the following steps:

1. Select .



The **Action Center Settings** dialog box is shown. It contains the following fields and controls:

- Staff Name**: A drop-down menu.
- Groups**: A drop-down menu.
- Types**: A drop-down menu.
- Date Type**: A drop-down menu with the value "Action Date" selected.
- Date Range**: A drop-down menu with the value "Today" selected.
- Start Date**: A text field with the value "4/10/2019", a calendar icon, and a clear icon.
- End Date**: A text field with the value "4/10/2019", a calendar icon, and a clear icon.
- Sort By**: A drop-down menu with the value "Action Type (Asc)" selected.
- Buttons**: "Save" and "Cancel" buttons at the bottom.

2. From the **Staff Name** drop-down list, select one or more users.
3. From the **Groups** drop-down list, select one or more modules.
4. From the **Types** drop-down list, select one or more activities.
5. In the **Date Type** field, select one of the following options:
 - **Action Date**: Select actions with an action date within the date range specified in the **Date Range** field.
 - **Overdue + Action Date**: Select actions with an action date within the date range specified in the **Date Range** field plus overdue actions.
 - **Completed Date**: Select actions with a completed date within the date range specified in the **Date Range** field.
6. Set a date range by either selecting a predefined range from the **Date Range** drop-down list or by manually setting start and end dates.
7. From the **Sort By** field, select how you want your actions sorted.

8. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

For more information about how to enter activity notes or details, see [Adding actions](#).

Action Center functions

You can access the following functions from the functions menu in the **Action Center** pane:

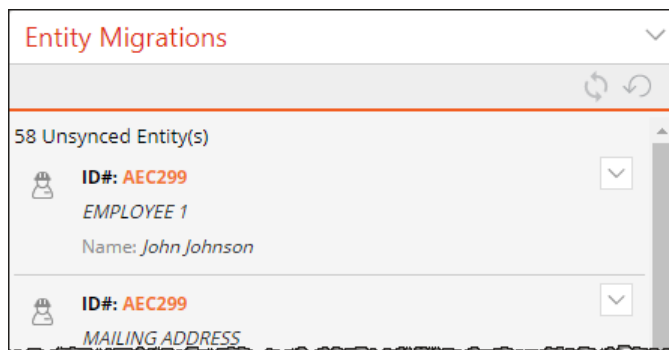
- To modify the action, select **Edit**.
- To view all activities on the record, select **History**.
- To add an activity not previously listed, select **Add Action**.
- To void an activity, select **Void**.
- To add an attachment, select **View/Add Attachments**.
- To print a Chronology-related document, select **Print**.

Entity Migrations

Use this pane to view a list of contacts that were updated in CentralSquare Mobiles or eTRAKiT, and then update those contacts with the new details from CentralSquare Mobiles or eTRAKiT.



When you synchronize contacts, Community Development compares the new or updated contacts to existing contacts. For new contacts, if an existing contact with the same name is found, you can choose to use the existing contact or add a contact. This check helps prevent duplicate contact entries. For updated contacts, Community Development updates the existing contact with the update from Mobiles or eTRAKiT.

The total number of unsynchronized entities appears above the list of contacts.



From this pane, you can synchronize all contacts or an individual contact:


- To synchronize all contacts listed, select  in the pane's header.

If many contacts are listed, you might need to use the  function multiple times. If the process ends and contacts are still listed in the **Entity Migrations** pane, select  again. Repeat until all

contacts are synchronized.

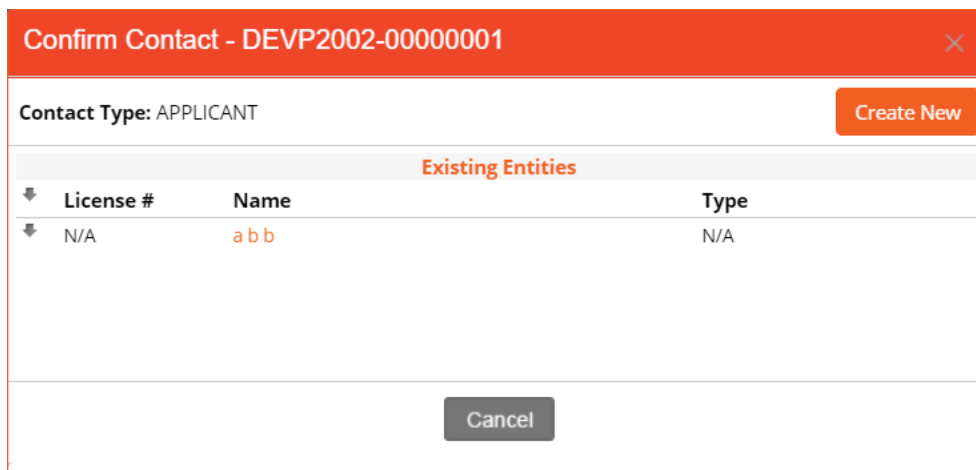
- To synchronize individual contacts, select ☐ next to the contact name, and then select **Sync**.

When you synchronize contacts, Community Development checks for existing contacts that match the contact from Mobiles or eTRAKiT. If Community Development does not find any matches, the contact is added. If Community Development finds a possible match, the **Confirm Contact** dialog box appears. This dialog box lists contacts that match the contact you are synchronizing and includes the following features:

- **Create New** button: Select this button if none of the contacts listed match the contact you are synchronizing.
- Arrow  in each contact row: Select the arrow to see more or less detail about the contact.
- **License #** column: Shows the Entity Management record number for an Entity Management record or **N/A** for a standalone contact.
- **Type** column: Shows the contact type from the Entity Management record (for example, architect, electrical engineer, or contractor), or **N/A** for a standalone contact.
- Multiple ways to select a contact: Select the license number link or name link to select the contact.

Important: Community Development synchronizes the contact as soon as you select the license number or name link, and the synchronization cannot be undone. Be sure you choose the correct contact before you select the link.



- **Cancel** button: Select **Cancel** to close the dialog box without synchronizing the contact and return to Workspace.



The image shows a 'Confirm Contact' dialog box with a red header bar containing the title 'Confirm Contact - DEVP2002-00000001' and a close button. Below the header, the 'Contact Type' is set to 'APPLICANT', and there is a 'Create New' button. A table titled 'Existing Entities' contains one row with columns for 'License #', 'Name', and 'Type'. The 'License #' is 'N/A', the 'Name' is 'a b b', and the 'Type' is 'N/A'. A 'Cancel' button is at the bottom.

Existing Entities		
License #	Name	Type
N/A	a b b	N/A

The **Entity Migrations** pane includes these additional functions:

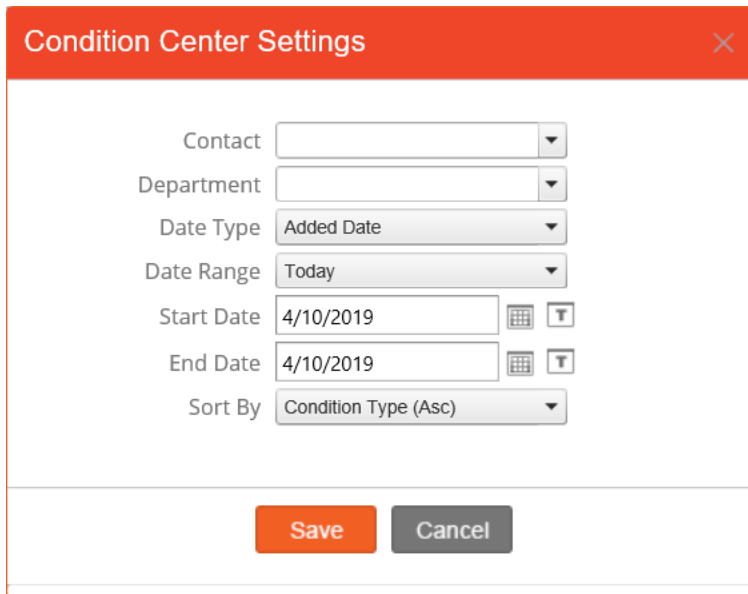
- **Edit:** Modifies an individual contact. Select  next to the contact name, and then select **Edit**. Complete fields as needed in the **Contacts** dialog box, and then select **OK**.
- **Refresh:** Updates the list in the pane. Select  in the pane's header.

Conditions

The **Conditions** pane provides a central location from which you can view and edit conditions on any permit, project, or license.

To customize the **Conditions** pane, complete the following steps:

1. Select .



The **Condition Center Settings** dialog box is shown. It has a red header bar with the title and a close button. The main area contains several fields: **Contact** (a dropdown menu), **Department** (a dropdown menu), **Date Type** (a dropdown menu with 'Added Date' selected), **Date Range** (a dropdown menu with 'Today' selected), **Start Date** (a text field with '4/10/2019' and a calendar icon), **End Date** (a text field with '4/10/2019' and a calendar icon), and **Sort By** (a dropdown menu with 'Condition Type (Asc)' selected). At the bottom, there are two buttons: **Save** (orange) and **Cancel** (gray).

2. Select one or more users from the **Contact** drop-down list.
3. Select one or more departments from the **Department** drop-down list.
4. Select which conditions to you want to see by selecting a date in the **Date Type** field.
5. Set a date range by either selecting a predefined range from the **Date Range** drop-down list or by manually setting start and end dates.
6. Select how you want conditions sorted from the **Sort By** drop-down list.
7. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

For more information about how to enter condition results/notes, see [Editing conditions](#).

Conditions functions

You can access the following functions from the functions menu in the **Conditions** pane:

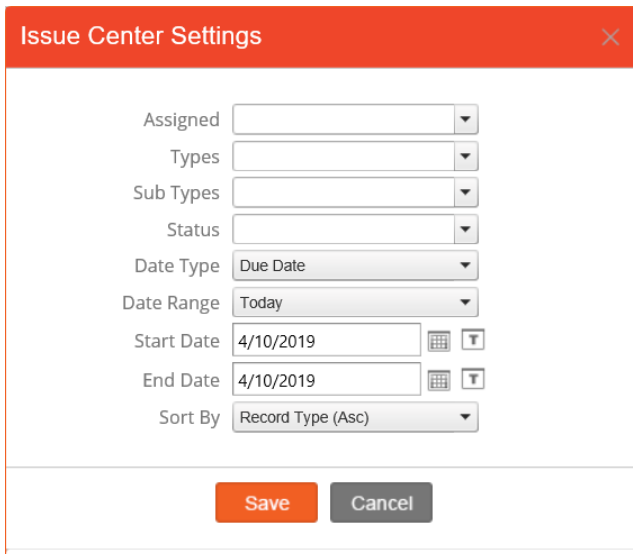
- To edit the record, select **Edit**.
- To view all conditions on the record, select **History**.
- To add a condition not previously listed, select **Add**.
- To void a condition, select **Void**.
- To add an attachment, select **View/Add Attachments**.
- To print a Condition-related document, select **Print**.

Issues

The **Issues** pane provides a central location from which you can view and edit CRM issues.

To customize the **Issues** pane, complete the following steps:

1. Select .



The **Issue Center Settings** dialog box is shown with a red header bar and a close button (X) in the top right corner. It contains several configuration options for the Issues pane:

- Assigned:** A dropdown menu.
- Types:** A dropdown menu.
- Sub Types:** A dropdown menu.
- Status:** A dropdown menu.
- Date Type:** A dropdown menu with "Due Date" selected.
- Date Range:** A dropdown menu with "Today" selected.
- Start Date:** A date input field showing "4/10/2019" with a calendar icon and a "T" icon.
- End Date:** A date input field showing "4/10/2019" with a calendar icon and a "T" icon.
- Sort By:** A dropdown menu with "Record Type (Asc)" selected.

At the bottom of the dialog are two buttons: **Save** (orange) and **Cancel** (gray).

2. Select one or more users from the **Assigned** drop-down list.
3. Select one or more issue types from the **Types** drop-down list.
4. Select one or more issue subtypes from the **Sub Types** drop-down list.
5. Select one or more issue status values from the **Status** drop-down list.
6. Select the issues you want to see by selecting a date in the **Date Type** drop-down list.
7. Set a date range by either selecting a predefined range from the **Date Range** drop-down list or by manually setting start and end dates.

8. In the **Sort By** field, select a sort option.
9. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

Issues functions

You can access the following functions from the functions menu in the **Issues** pane:

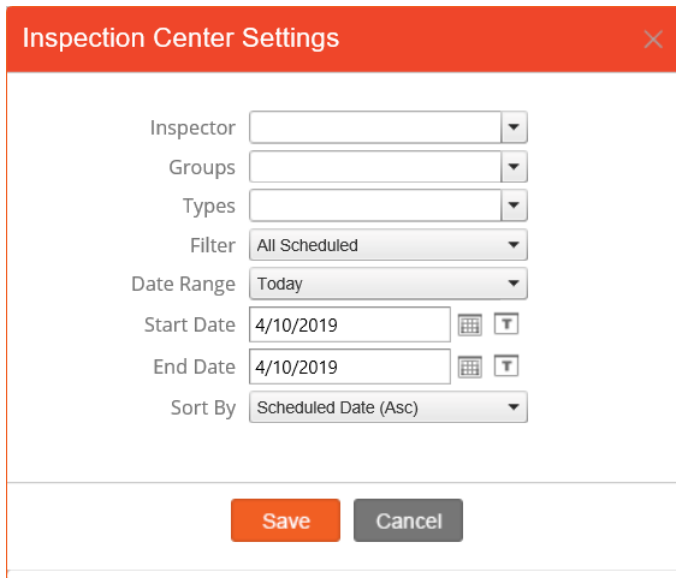
- To edit the record, select **Edit**.
- To view all activities on the record, select **Issue History**.
- To add an issue not previously listed, select **Add Another Issue**.
- To add an attachment, select **View/Add Attachments**.
- To print an issue-related document, select **Print**.

Inspections

The **Inspections** pane provides a central location from which you can view and edit inspections on any permit, project, case, or license.

To customize the **Inspections** pane, complete the following steps:

1. Select .



The **Inspection Center Settings** dialog box is shown with a red header and a close button (X) in the top right corner. It contains the following fields and controls:

- Inspector**: A text input field with a dropdown arrow.
- Groups**: A text input field with a dropdown arrow.
- Types**: A text input field with a dropdown arrow.
- Filter**: A dropdown menu currently showing "All Scheduled".
- Date Range**: A dropdown menu currently showing "Today".
- Start Date**: A text input field showing "4/10/2019" with a calendar icon and a "T" icon to the right.
- End Date**: A text input field showing "4/10/2019" with a calendar icon and a "T" icon to the right.
- Sort By**: A dropdown menu currently showing "Scheduled Date (Asc)".

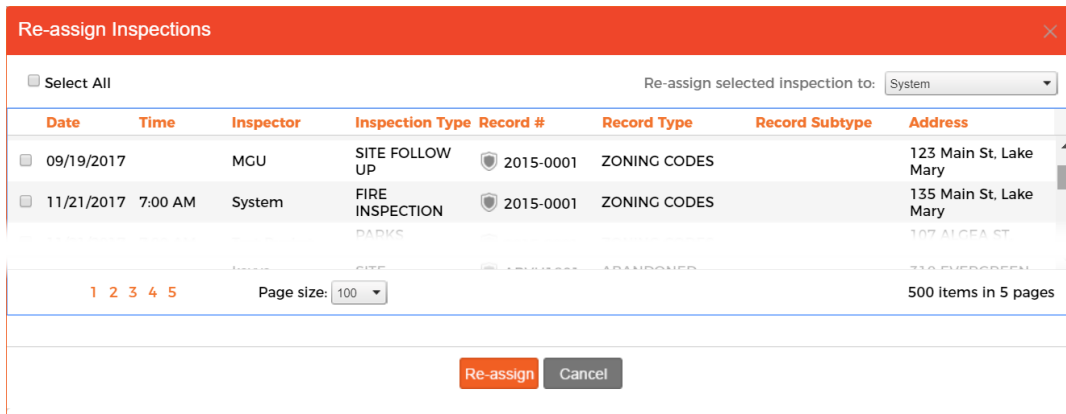
At the bottom of the dialog are two buttons: **Save** (orange) and **Cancel** (gray).

2. Select one or more inspectors from the **Inspector** drop-down list.
3. Select one or more modules from the **Groups** drop-down list.
4. Select one or more inspection types from the **Types** drop-down list.
5. Select a filter option in the **Filter** drop-down list.

6. Set a date range by either selecting a predefined range from the **Date Range** drop-down list or by manually setting start and end dates.
7. Select how you want your inspections sorted from the **Sort By** drop-down list.
8. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

To reassign inspections to another inspector:

1. Select .



The dialog box titled "Re-assign Inspections" has a red header bar with a close button (X) in the top right corner. Below the header, there is a "Select All" checkbox on the left and a "Re-assign selected inspection to:" dropdown menu on the right, currently set to "System". The main area contains a table with the following columns: Date, Time, Inspector, Inspection Type, Record #, Record Type, Record Subtype, and Address. The table lists two inspections: one from 09/19/2017 by MGU (SITE FOLLOW UP) and another from 11/21/2017 by System (FIRE INSPECTION). Below the table, there are pagination controls showing "1 2 3 4 5", a "Page size:" dropdown set to "100", and a status "500 items in 5 pages". At the bottom of the dialog, there are two buttons: "Re-assign" (orange) and "Cancel" (grey).

Date	Time	Inspector	Inspection Type	Record #	Record Type	Record Subtype	Address
09/19/2017		MGU	SITE FOLLOW UP	2015-0001	ZONING CODES		123 Main St, Lake Mary
11/21/2017	7:00 AM	System	FIRE INSPECTION	2015-0001	ZONING CODES		135 Main St, Lake Mary

2. Select one or more inspections that you want to reassign.
3. Select the inspector.
4. Select **Re-assign**.

Inspections functions

You can access the following functions from the functions menu in the **Inspections** pane:

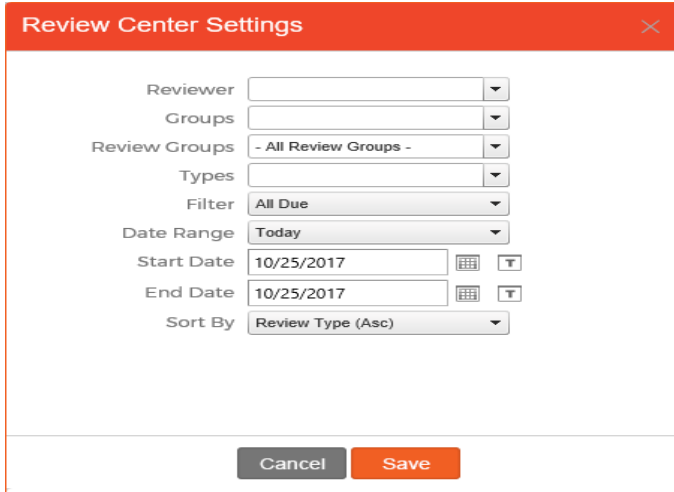
- To edit the record, select **Edit**.
- To view all inspections on the record, select **Inspection History**.
- To add an inspection not previously scheduled, select **Add Another Inspection**.
- To void an inspection, select **Void Inspection**.
- To add an attachment, select **View/Add Attachments**.
- To print an inspections-related document, select **Print**.

Reviews

The **Reviews** pane provides a central location where you can view and edit reviews on any permit, project, or license. The reviews that are listed depend on your **Reviews** pane settings.

To customize the **Reviews** pane, complete the following steps:

1. Select .

A screenshot of the 'Review Center Settings' dialog box. It has a red header bar with the title 'Review Center Settings' and a close button (X). The dialog contains several settings: 'Reviewer' (a dropdown menu), 'Groups' (a dropdown menu), 'Review Groups' (a dropdown menu with '- All Review Groups -'), 'Types' (a dropdown menu), 'Filter' (a dropdown menu with 'All Due'), 'Date Range' (a dropdown menu with 'Today'), 'Start Date' (a date input field with '10/25/2017' and a calendar icon), 'End Date' (a date input field with '10/25/2017' and a calendar icon), and 'Sort By' (a dropdown menu with 'Review Type (Asc)'). At the bottom, there are two buttons: 'Cancel' and 'Save'.

2. Select one or more reviewers from the **Reviewer** drop-down list.
3. Select one or more modules from the **Groups** drop-down list.
4. Select one or more review groups from the **Review Groups** drop-down list.
5. Select one or more review types from the **Types** drop-down list.
6. Select a filter option in the **Filter** drop-down list.
7. Set a date range by either selecting a predefined range from the **Date Range** drop-down list or by manually setting start and end dates.
8. Select how you want your reviews sorted from the **Sort By** drop-down list.
9. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

Reviews functions

You can access the following functions from the functions menu in the **Reviews**pane:

- To enter review results, select **Edit**. For more information about entering review results, see [Editing reviews](#).
- To view all reviews on the record, select **Review History**.
- To add a review not previously listed, select **Add Review**.

- To void a review, select **Void Review**.
- To add an attachment, select **View/Add Attachments**.
- To print a review-related document, select **Print**.

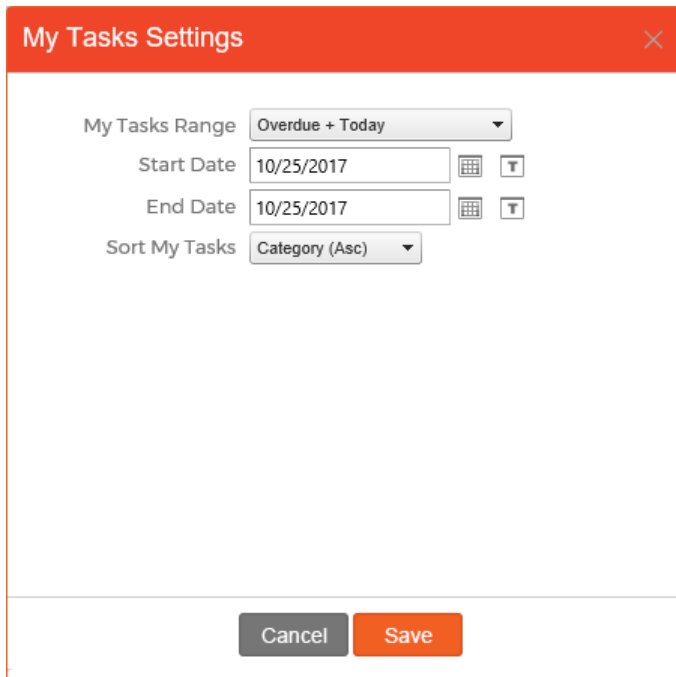
My Tasks

The **My Tasks** pane provides a central location where you can view and edit conditions, inspections, issues, and reviews.

Items appear in **My Tasks** only if they have a scheduled completion date. For example, conditions must have a date in **Date Required** and actions must have a date in **Action Date**.

To customize the **My Tasks** pane, complete the following steps:

1. Select .

A screenshot of the 'My Tasks Settings' dialog box. The dialog has a red header bar with the title 'My Tasks Settings' and a close button (X). The main area contains four settings: 'My Tasks Range' with a dropdown menu showing 'Overdue + Today'; 'Start Date' with a text input '10/25/2017' and a calendar icon; 'End Date' with a text input '10/25/2017' and a calendar icon; and 'Sort My Tasks' with a dropdown menu showing 'Category (Asc)'. At the bottom, there are two buttons: 'Cancel' and 'Save'.

2. Select a date or date range from the **My Tasks Range** drop-down list.
3. If you selected **Overdue + Selected Dates**, enter start and end dates.
4. From the **Sort My Tasks** drop-down list, select how you want your reviews sorted.
5. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

My Tasks functions

You can access the following functions from the functions menu in the **My Tasks** pane:

- To edit a task, select **Edit**.
- To view task history, select **History**.
- To add a task, select **Add Another**.
- To void a task, select **Void**.
- To add an attachment, select **View/Add Attachments**.
- To print a related document, select **Print**.

GIS

Overview

GIS (geographic information system) is a spatial solution for working with Community Development records. Using an interactive map, users can work with a variety of geographic features such as parcels, streets, hydrants, addresses, billboards, cell towers, apartment units, and office suites.



Using GIS, you can:

- Create activity records
- Add attachments or restrictions
- Create custom notices and reports, such as owner notification letters, for selected parcels
- Print a quick map of an area of interest
- Find the most efficient route between scheduled inspections and print directions utilizing a Network Analyst Service
- Query using advanced search plotting to simulate hotspot analysis of areas with dense activity
- Query using advanced search charting to view a time line of permits issued by date

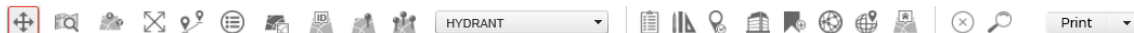
GIS is accessible through many of the Community Development features, including the navigation bar and individual Community Development records. You can also add GIS to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

Getting started

To open GIS, use one of the following procedures:

- In the navigation bar, select .
- From a Land Management record, point to the functions menu and then select **Launch in GIS** to open GIS, centered on the associated point usershape on the map.
- In a search results listing, select  next to a record to open that record in GIS.

Use the GIS toolbar to access GIS tools.






Navigation features


Use navigation features to display different sections of a map at various magnification (zoom) levels.

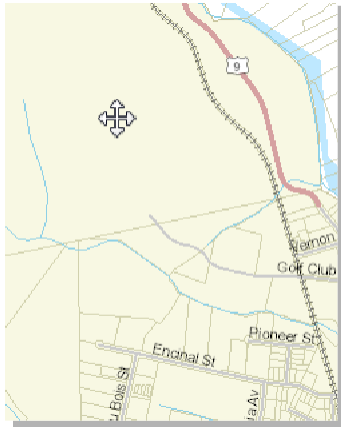
Magnification

Change the magnification of the map using the following options:

- **Zoom In:** Rotate the wheel button forward, double-click the map, select , or use the **Zoom In** tool .
- **Zoom Out:** Rotate the wheel button backward or select .

Navigate tool


Display a different map section in panning mode by selecting  and then dragging the map.



Zoom In tool

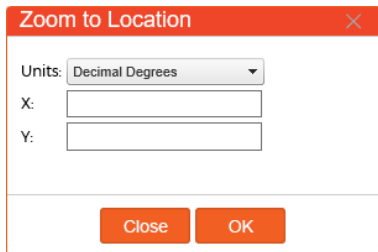
Use the **Zoom In** tool to magnify an area. Select  and then drag to select an area on the map.

Zoom-to-Coordinates tool

Zoom to exact coordinates on the map using the **Zoom-to-Coordinates** tool .


1. In the **Zoom to Location** window, select the units to be used: **Decimal Degrees** or **Map Units**.
2. Enter the longitude in the **X** field and the latitude in the **Y** field.

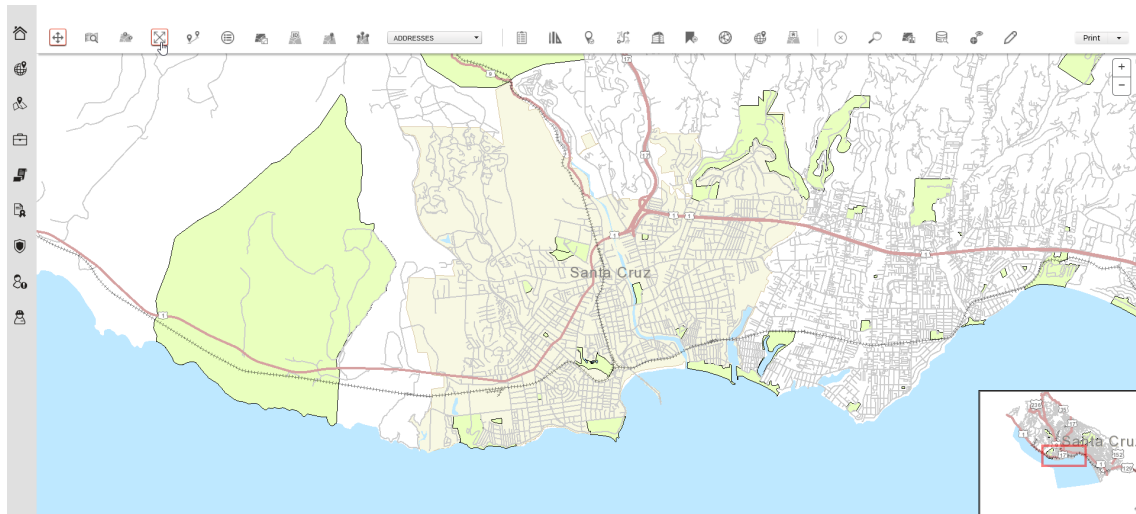
3. Select **OK** to zoom the map to these exact coordinates.



A dialog box titled "Zoom to Location" with a close button (X) in the top right corner. It contains a "Units:" dropdown menu set to "Decimal Degrees". Below this are two input fields labeled "X:" and "Y:". At the bottom are two buttons: "Close" and "OK".

Full Extent tool

Reset the screen display to the full extent of the map by selecting on the **Full Extent** tool .




Measurement features

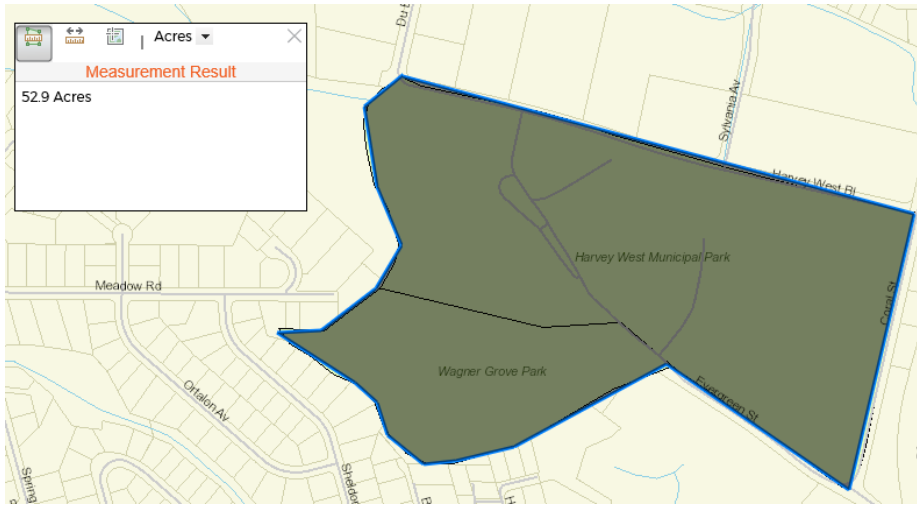
Using measurement features, you can measure area and distance, as well as find the latitude and longitude coordinates of an exact location on a map.

Area tool

Measure an area by first selecting the **Measure** tool .


1. In the pop-up window, select the **Area** tool  and the unit of measurement.
2. Select a point on the map to begin forming the area to measure. Select another point on the map to establish a vertex and repeat until all vertices are added. Double-click to complete the area shape.

The measurement of the selected area appears in the pop-up window.

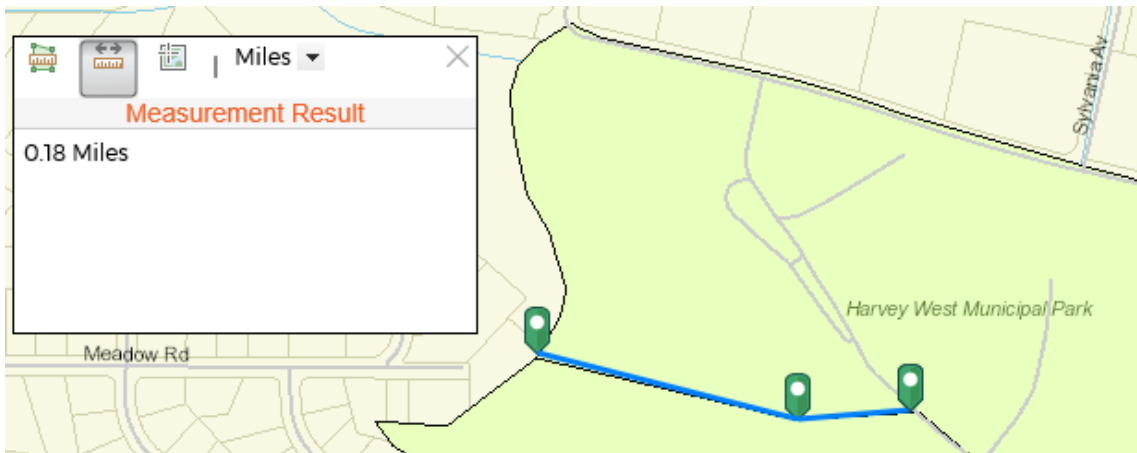


Distance tool

Measure a distance by selecting the **Measure** tool  and then completing these steps:

1. In the pop-up window, select the **Distance** tool  and the unit of measurement.
2. Select on the map to select the beginning point of the measurement. Select additional points on the map to add intermediate points to your line. Double-click on the map to select the ending point of the measurement.

The length of the line appears in the pop-up window.

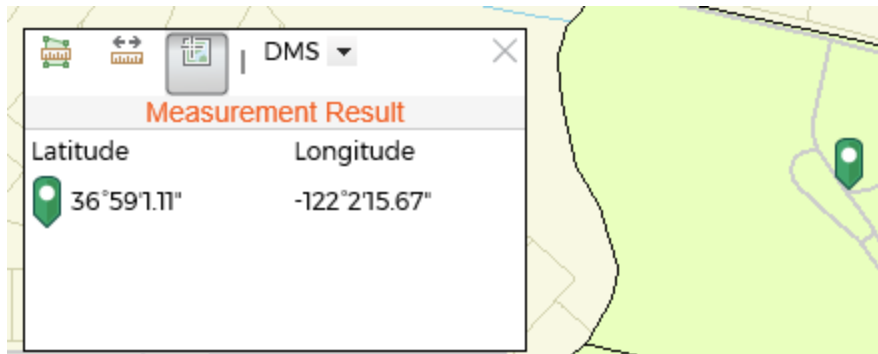


Location tool

Find a location by first selecting the **Measure** tool .

1. In the pop-up window, select the **Location** tool  and the unit of measurement.
2. Select a point on the map.


The latitude and longitude of the selected point on the map appear in the pop-up window.



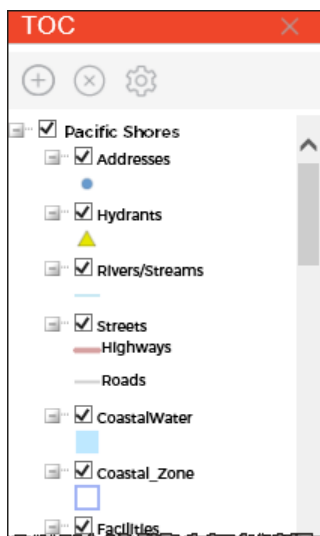
Viewing features

Viewing features enable you to display map information and map layers in different ways.

Table of Contents tool


View a list of all of the layers in a map using the **Table of Contents** tool . Your agency's GIS specialist manages the available layers.

- **View map layers:** Select the plus sign beside the map name to expand the layers.
- **Display map layers:** Select the check box next to the layer name.
- **Hide map layers:** Clear the check box next to the layer name.




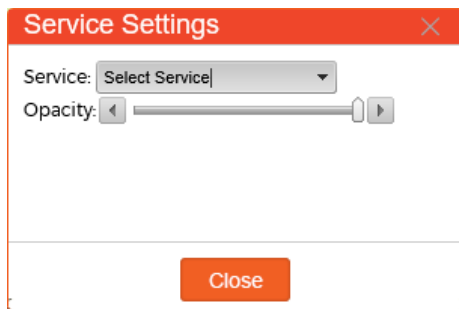
Removing a map service

The map services is removed for you during the current user session only. Other users are not affected, and the map service is available the next time you log in.


1. In the **TOC** window, select .
2. Select the map that you want to remove from the list.
3. Select **OK**.

Adjusting map service settings

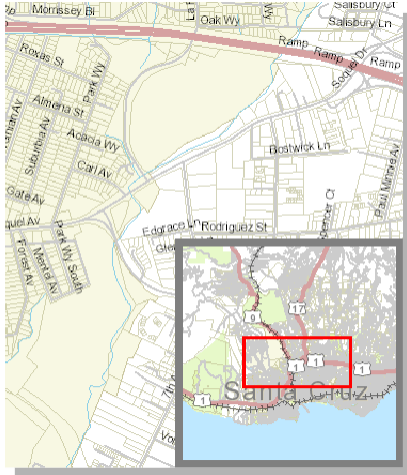
1. In the **TOC** window, select .
2. Select a service.
3. Move the slider to adjust the opacity of the map layer for the user view.
4. Select **Close**.




Overview Map tool


Use the **Overview Map** tool  to show or hide a small overview map with a bounding box showing the current view in the main map window.

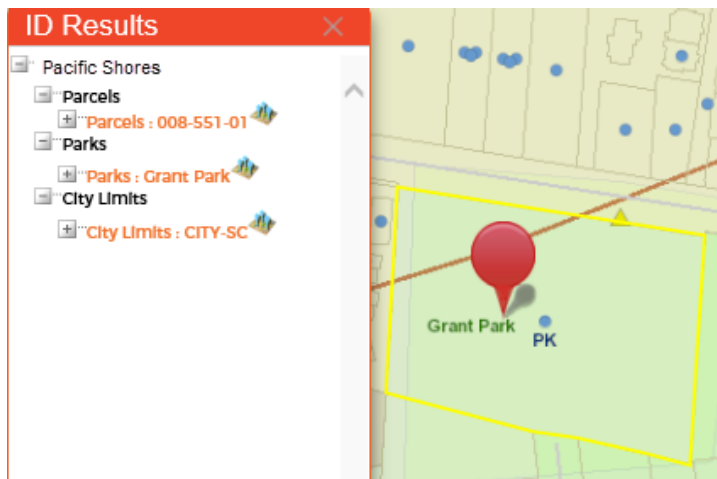
As you move and zoom within the main map window, the overview window adjusts. You can also drag the bounding box in the overview window to reposition the main map.



ID tool

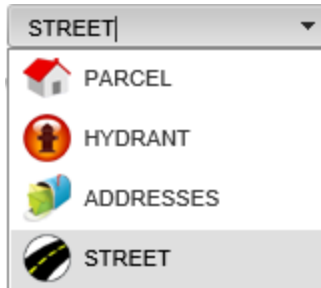
Display features associated with map layers using the Identify (ID) tool  and selecting on the map. From the pop-up window, you can:

- Expand the listed layers to display the GIS attributes of the features.
- Select a feature hyperlink to highlight the feature on the map.
- Select the Multi Select icon  to select surrounding features. Be sure to select a geotype feature (for example, hydrant, address, street, or parcel).



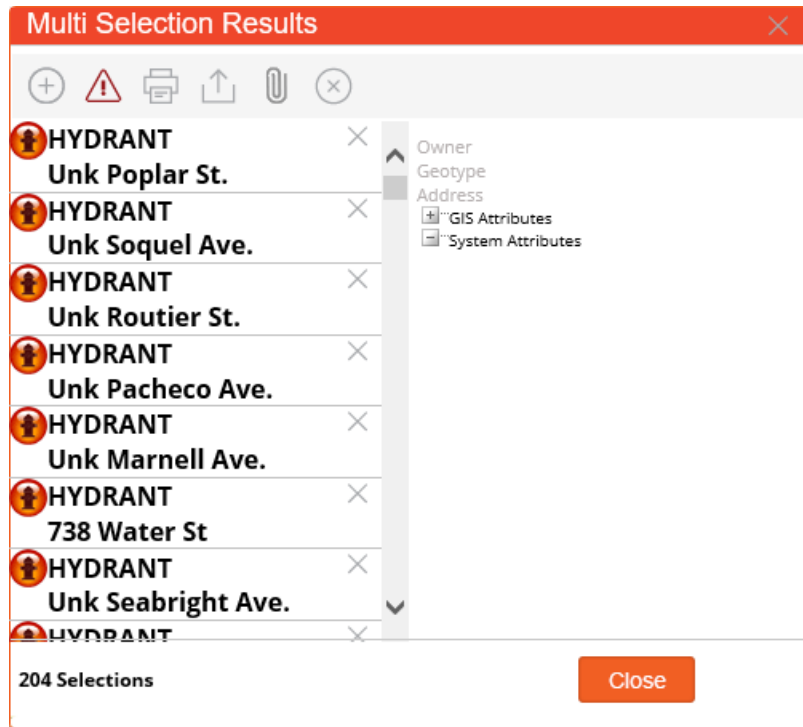
To use the Multi Select tool, complete the following steps:

1. From the geotype feature list, select the geotype feature you want to work with.



2. In the Select By Feature window:
 - a. Select an option in the **Selection Method** field. The options are:
 - Intersect With: Select surrounding features that intersect with the selected feature
 - Buffer: Select features that are within a specific area around the selected feature
 - b. Select an option in the **Selection Type** field. The options are:
 - New: Create a new selection
 - Add To: Supplement previous selections
 - Remove From: Subtract from a previous selection
 - c. If you selected **Buffer** in the **Selection Method** field, enter the distance and select a unit of measurement for the buffer area.

- d. Select **OK**. The **Multi Selection Results** window appears.



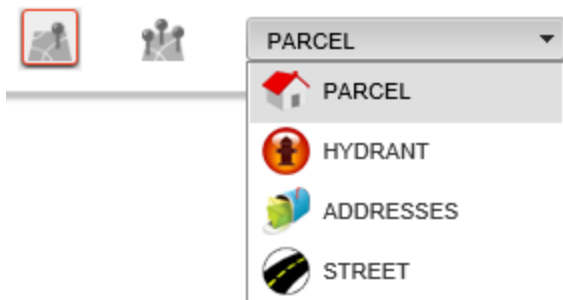
From the **Multi Selection Results** window, you can work with selection results and related records. For more information, see [Multi-selection results](#).

Selection features

Selection features show geometric shapes that identify a set of features.

Single Select tool

1. Zoom to an area of interest on the map.
2. Select the geotype feature you want to select from the feature list.

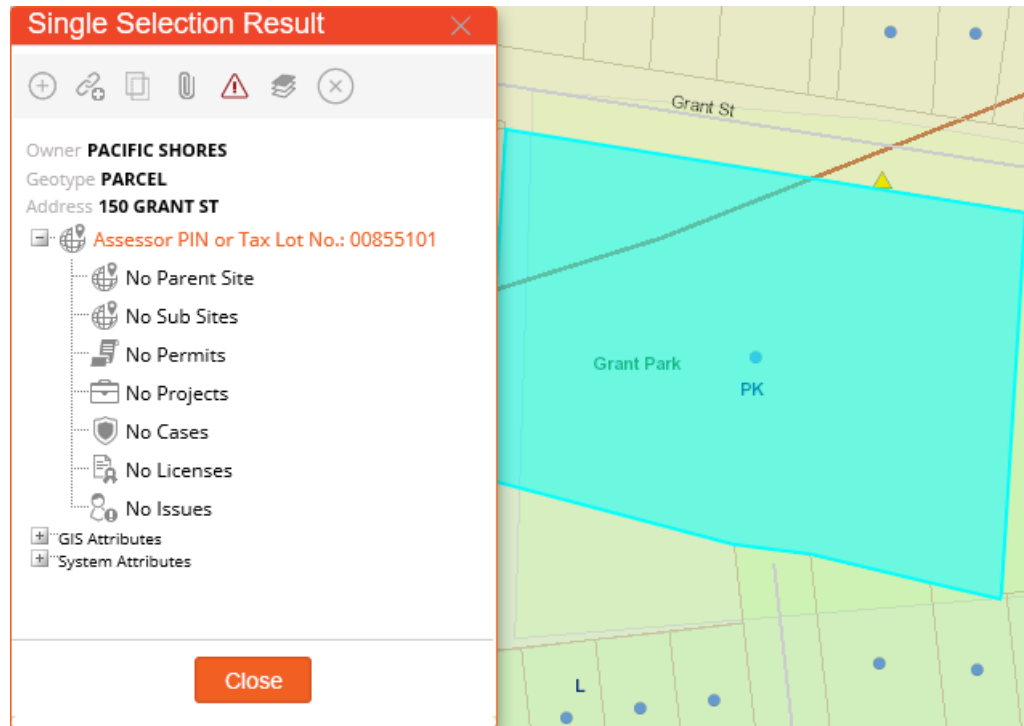


3. Select the **Single Select** tool . The pop-up window appears.

- On the map, select a feature to select it. The feature you select must be the type of feature selected in step 2. The selection is highlighted on the map and details about the selection appear in the pop-up window.

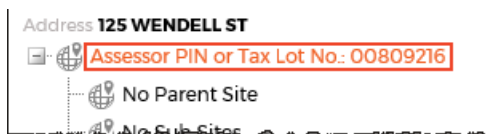
Single selection results


The **Single Selection Result** window appears after you select a feature using the single select tool.

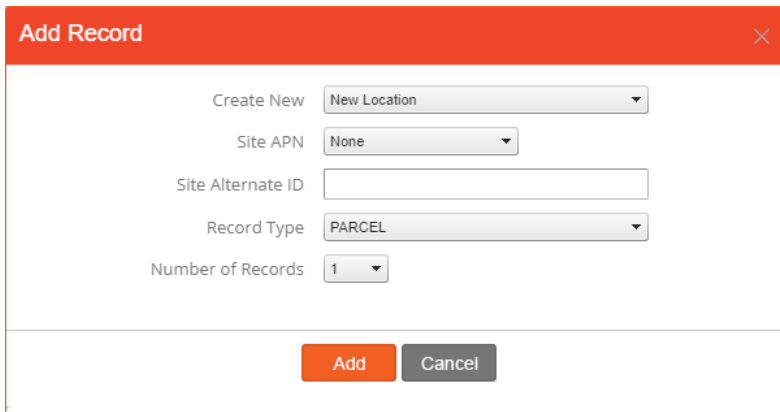


From the **Single Selection Result** window, you can:

- Select a link to open a related record.



- Add a record. Select  and then select options for the new record.

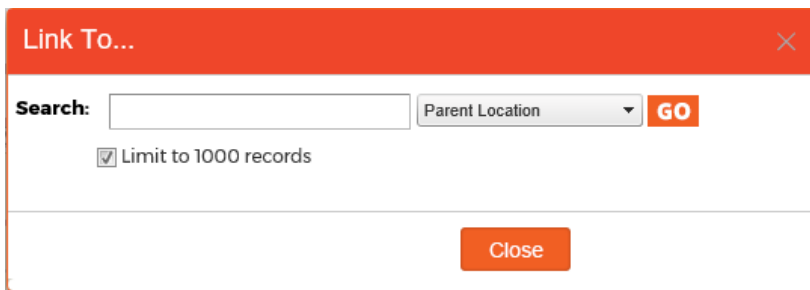


Add Record [X]

Create New: New Location [v]
 Site APN: None [v]
 Site Alternate ID: [text field]
 Record Type: PARCEL [v]
 Number of Records: 1 [v]

[Add] [Cancel]


- Link to a record. Select , search for the record to link to, and select where to link the record.

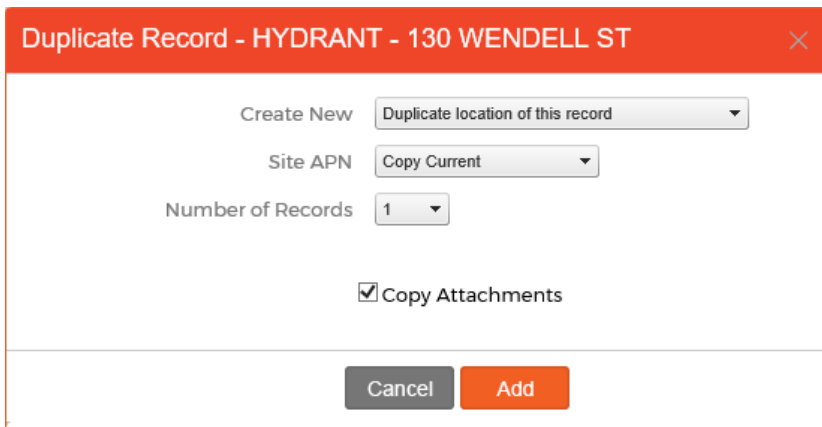


Link To... [X]

Search: [text field] Parent Location [v] **GO**
☒ Limit to 1000 records

[Close]

- Duplicate a record. Select  and then select options for copying the current geotype record.




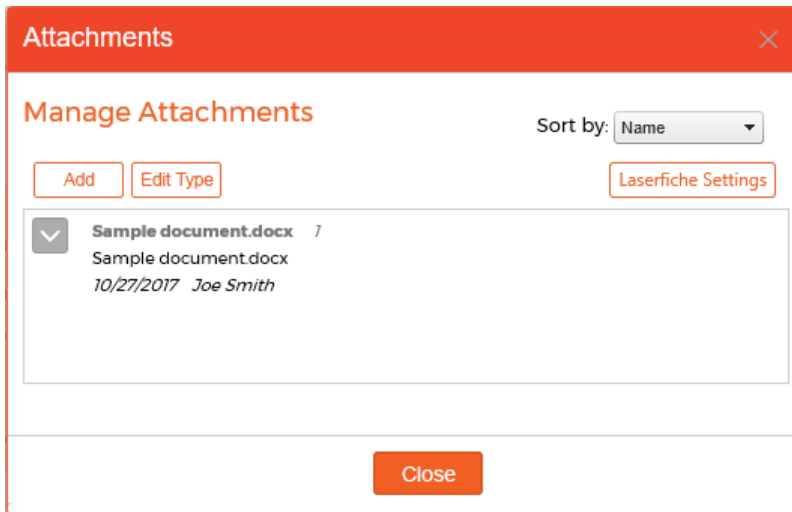
Duplicate Record - HYDRANT - 130 WENDELL ST [X]

Create New: Duplicate location of this record [v]
 Site APN: Copy Current [v]
 Number of Records: 1 [v]


☒ Copy Attachments

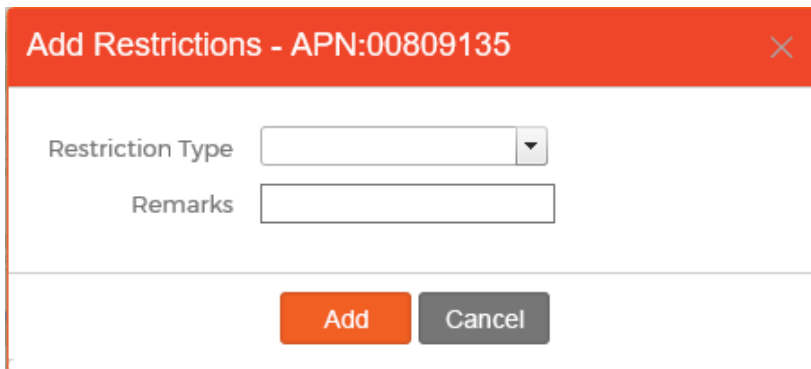
[Cancel] [Add]

- Manage attachments. Select  to add an attachment, change settings on existing attachments, or change settings for your document management system.




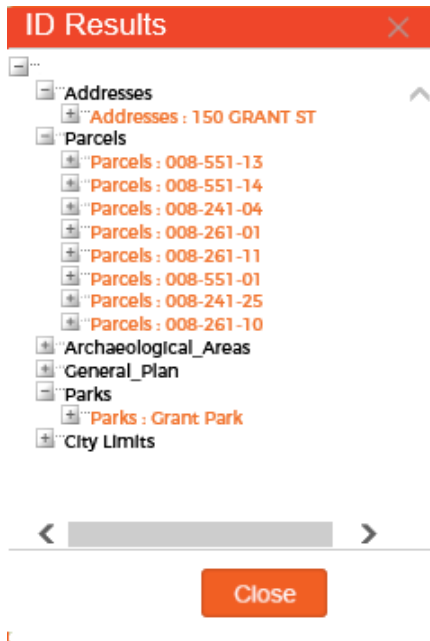
The 'Attachments' modal window has a red header with the title 'Attachments' and a close button. Below the header is a section titled 'Manage Attachments'. On the right side of this section is a 'Sort by:' dropdown menu currently set to 'Name'. Below the title are three buttons: 'Add', 'Edit Type', and 'Laserfiche Settings'. The main area contains a list of attachments. The first item is 'Sample document.docx' with a checkmark icon to its left. Below the filename, it shows 'Sample document.docx' and '10/27/2017 Joe Smith'. At the bottom of the modal is a 'Close' button.


- Add a restriction to a record. Select  and then select a restriction type and type related remarks. For more information about restrictions, see [Restrictions](#).



The 'Add Restrictions - APN:00809135' modal window has a red header with the title and a close button. The main area contains two input fields: 'Restriction Type' with a dropdown arrow and 'Remarks' with a text box. At the bottom are two buttons: 'Add' and 'Cancel'.

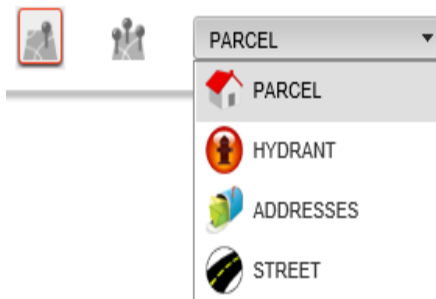
- Drill down to view additional details. Select  and then expand each layer to show the GIS details.




- Clear the active selections from the map by selecting .

Multi-Select tool

1. Zoom to an area of interest on the map.
2. From the geotype feature list, select the geotype feature you want to work with.



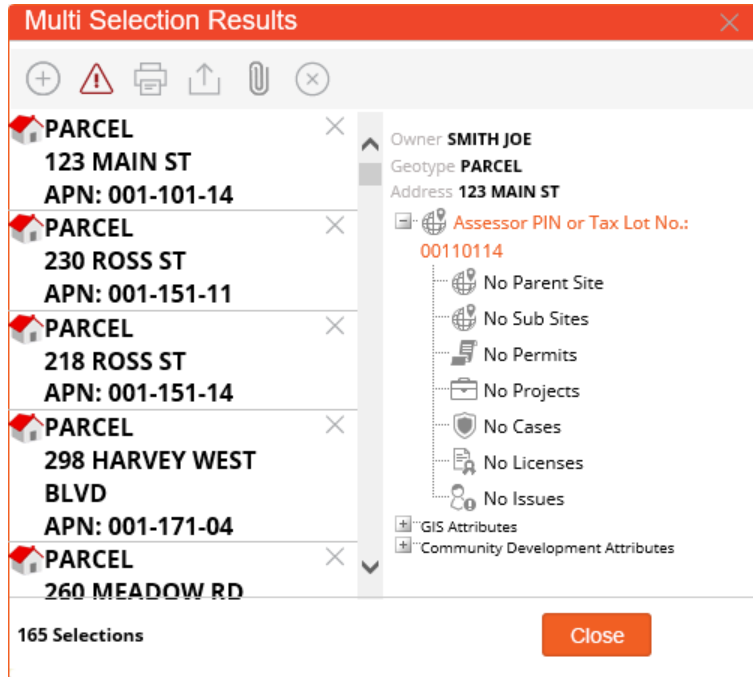
3. Select the **Multi-Select** tool . The pop-up window appears.
4. In the **Multi Select** window:
 - a. Select an option in the **Selection Method** field. The options are:
 - Rectangle: Select a point on the map to use as the upper left corner of the area and then drag to include the entire area you want to select.
 - Point: Select on the map.

- Polygon: Select a point on the map and drag to define the shape. Select for each additional vertex. Double-click to complete the polygon.
 - Line: Select a point on the map for the beginning point of the line. Select to add additional points on the line. Double-click to end the line.
 - Buffer: Enter the distance of the buffer in the Distance field, select the measurement unit, and select a feature on the map.
 - Radius: Enter the distance of the radius in the Distance field, select the measurement unit, and select a point on the map.
 - Circle: Select a point on the map to establish the center of the circle and drag to establish the area.
 - Ellipse: Select a point on the map to establish the center of the ellipse and drag to establish the area.
 - Freehand Polygon: Select a point on the map to establish one corner of the polygon and drag to complete the shape.
 - Freehand Polyline: Select a point on the map for the beginning point of the line and drag to complete the line.
 - Travel Time: Enter the number of minutes and select on the map to view the buffer area. A Network Analyst Service, for example Esri or Drivetime, must be active to use this feature.
 - Buffer Polygon: Enter the distance of the buffer, select for each vertex, and double-click to finish the shape.
 - Buffer Line: Enter the distance for the buffer, select for each point, and double-click to finish.
- b. Select an option in the **Selection Type** field. The options are:
- New: Create a new selection
 - Add To: Supplement previous selections
 - Remove From: Subtract from a previous selection
5. Enter the distance and unit of measurement if applicable to your selection method.
6. On the map, select a feature to select it. The feature you select must be the type of feature selected in step 2. The selection is highlighted on the map and details about the selection appear in the pop-up window.

Tip: To disable features, select **Clear Selection** ⓘ in the **Multi Selection Results** window *before* exiting the Multi Select tool.

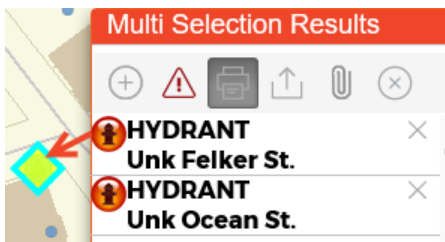
Multi-selection results

The **Multi Selection Results** window displays the features that are within the area you selected using the Multi Select tool.

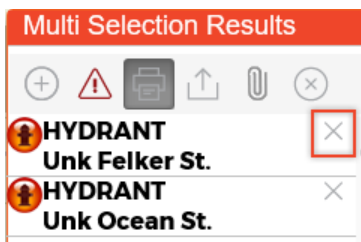


From the **Multi Selection Results** window, you can:

- Zoom to an individual geotype by selecting the icon in the results listing.




- Clear a geotype from the results listing by selecting X.



- Select a link to open a related record.



- Add a record. Select  and then select options for the new record. For more information about adding records, see [Adding activity records](#).

Add Record

Create New

New Location

Site APN

None

Site Alternate ID

Record Type


PARCEL

Number of Records

1

Add

Cancel

- Add a restriction to a record. Select  and then select a restriction type and type related remarks. For more information about restrictions, see [Restrictions](#).


Add Restrictions -

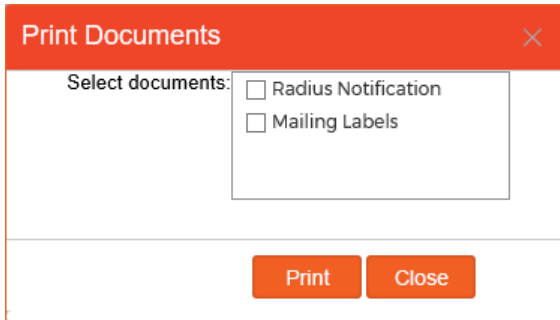
Specify the restriction type to add for all restrictions:


Remarks

Add

Cancel

- Print related documents. Select  and then select the document(s) to print.




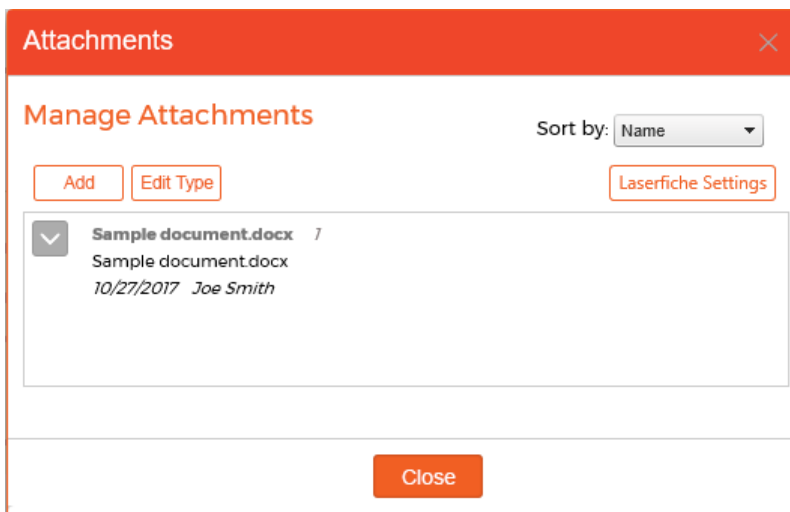
- Export selection results to a Microsoft Excel file. Select  and then follow the directions provided by your internet browser.


When you use the Export function, the following message might appear in Microsoft Excel:

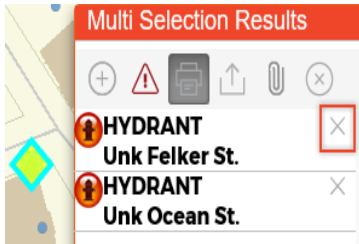
"The file format and extension of 'dataTableToExcel.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?"

Microsoft Excel displays this message as a security measure against potentially harmful files. Because Community Development is a trusted source, select **Yes** to continue with the export.

- Manage attachments. Select  to add an attachment, change settings on existing attachments, or change settings for your document management system.



- Clear the active selections from the map by selecting .







Sketching features

Use sketching features to add, save, and edit shapes or drawings that enhance GIS data.

To use the Sketch tools, select .

The **Sketch** window includes the following functions:

-  Save Sketch: Enter a name for the sketch, and select the icon again to save the sketch into the user folder on the server.
-  Open Sketch: In the **Open Sketch** dialog box, you can open a saved sketch, delete a saved sketch, or attach the sketch to a record.
-  Clear Sketch: Select to erase all active sketches on the map.
-  Edit Sketch: Select the shape to edit. The **Edit Sketch** window appears. Editing options include shape, color, line color, and line width. Global editing options include:
 - Refresh sketch
 - Delete sketch
 - Save sketch

Additionally, you can move the vertices on the sketch by dragging them and you can add notes to the sketch.

To add a sketch, complete the following steps:



1. In the **Sketch** dialog box, make the following selections:
 - Shape: Select a shape.
 - Color: Select a fill color. This option is not available if you selected **Polyline**, **Freehand Polyline**, or **Text** in the **Shape** field.
 - Line Color: Select a line color. This option is not available if you selected **Pushpin** or **Text** in the **Shape** field.
 - **Line Width**: Select a line width. This option is not available if you selected **Pushpin** or **Text** in the **Shape** field.

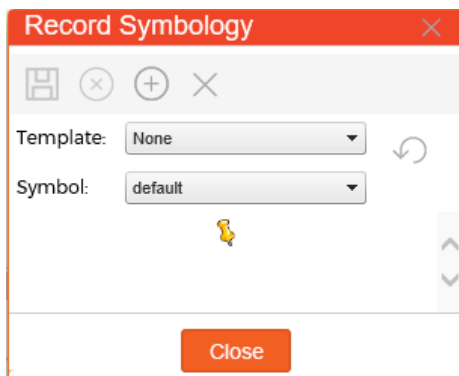
2. Sketch a shape on the map. For details about drawing most shapes, see the [Multi-Select tool](#) section. If you selected **Pushpin**, **Arrow**, **Triangle**, or **Text** in the **Shape** field, click on the map to place the shape.
3. **Text**: Select size, color, and font. Enter the text to appear on the map. Select anywhere on the shape to display the notes.
Text notes do not appear on printed maps.
4. Select **Close** when sketches are complete.

Other features

Record symbology


Use this tool to change the pushpin symbol that is used when you select **Plot on Map** from the advanced search results window. It can also be used *after* the search results have been plotted on the map.

1. Select  to add a pushpin. The **Record Symbology** window appears.
2. Select the desired symbol from the list and then select .

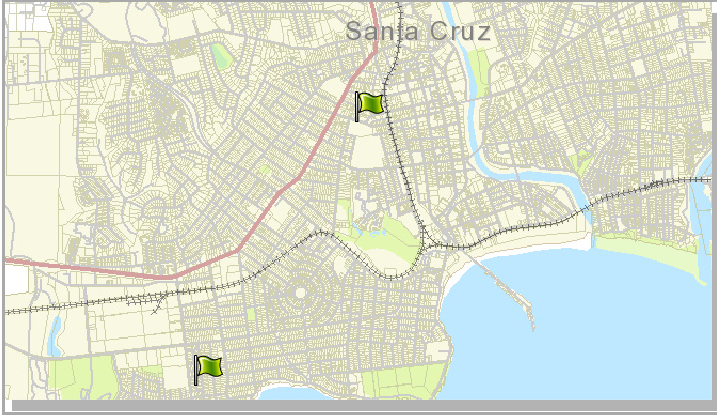


3. Point to **Advanced Search** and select a search from the menu.



4. If necessary, choose the search parameters.
5. Select **Search**. A list of records appears.
6. Select  to display the record pushpins. You can save the results as a sketch.

Tip: Select the **Full Extent** tool to zoom out and see the pushpins that were placed on the map. When you print the map, pushpins are included on the printed map.

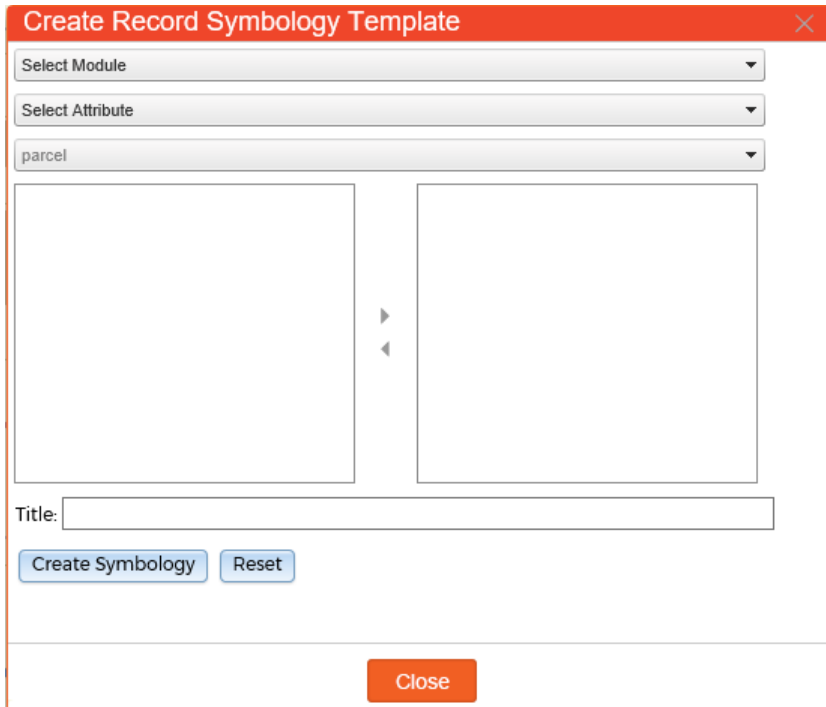


Pushpin tool symbology templates

From the **Record Symbology** dialog box, you can save a sketch, clear records, add record symbology templates, delete record symbology templates, and refresh symbology.

To add a record symbology template so that specific record types are associated with user-selected icons, complete the following steps:



1. Select .





The dialog box titled "Create Record Symbology Template" has a red header bar with a close button (X). It contains three dropdown menus: "Select Module", "Select Attribute", and "parcel". Below these is a visual interface with two large empty boxes and a double-headed arrow between them. At the bottom, there is a "Title:" text input field, two buttons labeled "Create Symbology" and "Reset", and a large orange "Close" button at the very bottom.

2. Select the module for the record.
3. Select the module-related attribute.
4. Select the icon to be used.


Note: To add a custom icon, save the icon as a PNG file in the arcGIS\icons folder.

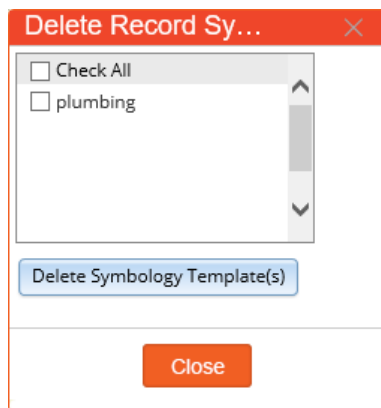
5. Select the status or type to be represented by the icon.
6. Select  to move the relationship into the selection box. To remove the relationship, select .
7. Enter a title for the template.
8. Select **Create Symbology** to create the template.

To activate the template, select the template in the **Record Symbology** dialog box and then select .


To save as a sketch, select , enter a name, and then select  to save the sketch to the user folder on the server.

To clear the active pushpins from the map, select .

To select and remove a template, select . In the dialog box, select one or more templates to delete and then select **Delete Symbology Template(s)**.




3D Views tool



Use this tool to view 3D maps in Google Street View and Bing Bird's Eye View. To view a location in 3D, select . In the dialog box, select the view. On the map, select a location.

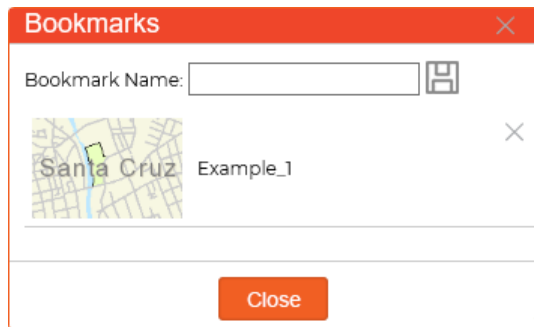


Tip: When using Google Street View, select near a visible road. Selecting too far away from a road might prevent Google Street View from loading the location.

Bookmarks tool


Use the Bookmarks tool to save a specific map location and magnification level. Select  to open the **Bookmarks** dialog box. From this dialog box, you can:

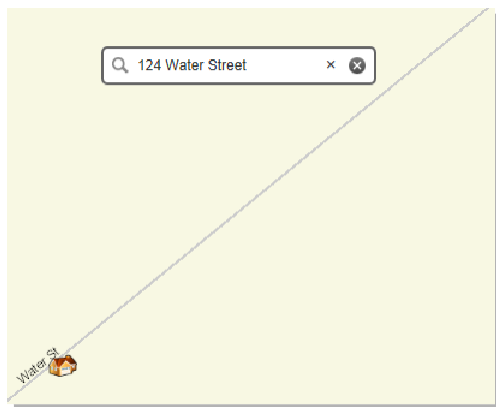
- View a bookmark. Select a bookmark in the list. The map view zooms to the location and magnification of the bookmark.
- Add a bookmark. Find the area on the map and adjust to the zoom level you want. In the **Bookmarks** dialog box, enter a name for the bookmark and then select . The current map view and name appear in the bookmark list.
- Delete a bookmark. In the **Bookmarks** dialog box, select  next to the bookmark name.



Geocode tool

Use the Geocode tool to zoom to a street address. Complete the following steps:

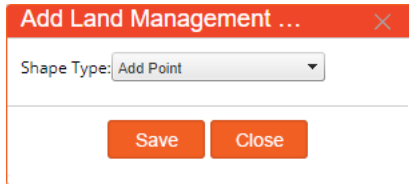
1. Select .
2. Enter the street address, including number and street name.
3. Press Enter.



Add Land Management Record tool

Use the **Add Land Management Record** tool to add a point, line, or polygon shape as a land record.

1. Select .
2. In the **Add Land Management Record** dialog box, select the shape type.




3. Draw the shape on the map based on the shape type you selected.
 - If you selected **Add Point**, select a point on the map.
 - If you selected **Add Line**, select on the map to set the starting point of the line. Select additional points on the map to set intermediate points on the line (for example, to change the direction of the line to follow a road or border a building). Double-click to set the ending point of the line.
 - If you selected **Add Polygon**, select on the map to set one corner of the polygon. Select additional points on the map to set additional corners. Double-click a point on the map to close the shape.
4. In the **Add Geo Record** dialog box, select **Save**. Select **Add** in the confirmation dialog box.

The new record appears in the Land Management module, allowing permits and other information to be added.

Plot Inspections tool

Use the **Plot Inspections** tool to place location pushpins on the map for inspections.


To plot inspections, complete the following steps:

1. Select .
2. In the **Plot Inspections** dialog box, make selections for the following options:
 - **Inspector**: Select the name of one or more inspectors or select **All** to plot inspections for all inspectors. The default inspector is the current user.
 - **Groups**: Select one or more categories (such as permits and licenses) or select **All** to plot inspections for all categories.
 - **Type**: Select one or more types that correspond to the value you selected for **Group** or select **All** to plot inspections for all types.

- **Filter:** Select an option for filtering inspections based on whether the inspection is scheduled, completed, incomplete, or overdue.
- **Date Range:** Select a predefined date range (such as today, tomorrow, or yesterday) or choose **Selected Dates**.
- **Start Date** and **End Date:** If you chose **Selected Dates** in the **Date Range** field, enter start and end dates. If you selected a predefined date range in the **Date Range** field, you do not need to enter start and end dates.
- **Sort By:** Select the field you want to use to sort inspections and whether to sort in ascending or descending order.

3. Select **OK**.


Clear Graphics tool

Use the **Clear Graphics** tool to remove all graphics that you added to the map, such as sketches, measurement selections, and ID pushpins. To remove all graphics, select  on the GIS toolbar.

Advanced GIS Search tool

Use the **Advanced GIS Search** tool to apply a query to a specific area drawn on the map.

To use the Advanced GIS Search tool:

1. On the GIS toolbar, select .
2. Choose a selection method (for example, a polygon, buffer, or radius).
3. Draw the selected shape on the map. For details about drawing shapes, see [Multi-Select tool](#).
4. When the advanced search window appears, select the parameters.
 - **Search Results Format:** Select to access and change the current search settings. In this screen, the module and field settings can be changed, additional parameters added or removed, and settings saved as a new default by checking the **Default Format** box. New formats can also be saved, reloaded, and removed here.

Note: When license type and permit type fields are added under **Search Results Format**, additional check boxes might be selectable in the advanced search.

- **Save:** Enter a name in the **Save Search to My Profile as** field and select to save a search.
- **Locate in (Module):** Select the module in which to focus the search.
- **Using Format:** Use the default search, select **My Last Search**, or select a saved search from the drop-down.
- **Limit To:** Use the default setting or select an option to return a limited number of records.

- Select the search field from the first drop-down menu. Fields vary by module.
 - Select a search condition from the second drop-down menu. The options are: **Contains**, **Is**, **Is Not**, **Begins With**.
 - Enter the criteria for the search in the field provided.
 - **Add**: Select to add another line of search criteria.
 - **Delete**: Select to delete the line of search criteria.
5. Select **Search** to view the listed record results. The result window includes the following options:
- **Edit Search**: Select to view and change current search parameters.
 - **New Search**: Select to return to the initial query screen that has no search parameters selected.
 - **Export**: Select to save your search results in a Microsoft Excel file.

Note: When you use the Export function, the following message might appear in Microsoft Excel:

"The file format and extension of 'RadGridExport.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?"

Microsoft Excel displays this message as a security measure against potentially harmful files. Because Community Development is a trusted source, select **Yes** to continue with the export.

- **Browse**: Select to load records from the resulting list to review one at a time.
- **Plot on Map**: Select to place pushpins on record locations on the map.

Print tool (GIS)

Use this tool to print a GIS map with or without annotations, margins, date, ratio, and scale.






1. On the GIS toolbar, choose one of the following actions:
 - Select **Print** to print the map using your default print settings
 - Select the **Print** arrow and then select a print option

Community Development processes the print job. When processing is complete, the **Print** tool button changes to a **Printout** link.

2. Select **Printout** to view the map in the default application.
3. In the default application, you can view, save, or print the map.

GIS Advanced

If you are licensed at the GIS Advanced level, the following additional features are available in GIS:


-  [Route Inspections tool](#)
-  Charting tool
-  Advanced Query tool
-  Visual Analysis tool
-  [Edit Features tool](#)

Note: The above tools require special services.

Route Inspections tool

Use the **Route Inspections** tool to create a custom route for scheduled inspections including the ability to rearrange the inspection order and produce driving directions.

To create a custom route, complete the following steps:

1. Select .
2. Select the inspector name from the drop-down list.
3. Select the inspection start and end dates.
4. Select **Plot**. The inspection locations appear on the map and the **Routing** dialog box appears.
5. In the **Routing** dialog box, you can:
 - Refresh: Select to display the route on the map; repeat to update after changes.
 - Delete Route: Select to clear the entire route, including the locations.
 - Print: Select to print the step-by-step driving directions of the inspection route.
6. The **Inspections** tab displays a list of the inspection route addresses, including a hyperlink to the Land Management record and a hyperlink to the inspection linked permit, code, or license record. On this tab, you can:
 - Delete: Select to remove a specific location from the route.
 - Rearrange: Select an address and drag it up or down in the list until a small gray arrow appears at the new placement.
 - Edit Inspection: Select to enter site follow-up notes on an inspection record.
7. The **Directions** tab displays step-by-step driving directions for the inspection route. Select the refresh button to display the directions.

Tip: A Network Analyst Service must be active to use the driving directions feature.

Edit Features tool

Use the **Edit Features** tool  to save, cancel, undo, redo, navigate, and zoom in.

Note: Use **Undo** to reverse the action *from the last save*. If your edit was *not* saved, use **Cancel** to reverse the last unsaved action. Use **Redo** to restore forward with respect to the last save.

When the **Edit Features** tool is selected, all other tools on the toolbar are unavailable.

The **Edit Features** dialog box includes the following tabs:

- **Edit Tools:** Use the tools on this tab to move, size, shape, delete, or add features. The selected layer determines which tools will be active for use on that feature layer.

Edit tools utilize advanced GIS functions and system administrators can restrict user access to any or all of the individual edit tools, depending upon the specific goals of the agency.

Depending on the map being used, the area must be zoomed 2x–5x in order to see available features and select the feature layer. Although it can be altered by the system administrator, the necessary view is typically limited to show 1,000 features due to the vast amount of geographic data being accessed.

- **Edit Feature Attributes:** When a feature is selected, the Edit Feature tool is used to access the geodata downloaded from the assessor.
- **Warning:** While these fields might be editable, some information might still be overwritten by the next download of assessor data.
- **Edit Feature Vertices:** This tool allows the selected object to be changed by dragging the active vertices.
- **Move Feature:** This tool allows the selected object to be moved by dragging the mouse in any direction.
- **Rotate Feature:** This tool allows the selected object to be rotated by selecting and moving the active handle.
- **Scale Feature:** This tool allows the object to be enlarged or reduced in size by selecting and moving the handles.
- **Reshape Feature:** This tool allows the selected object to be reshaped by drawing a line through the selected feature to form a new shape. A confirmation message appears before the action is completed.
- **Cut Feature:** This tool allows the selected object to be separated into two shapes by drawing a line through it to create two separate polygons. A confirmation message appears before the action is completed.
- **Select Features to Delete:** This tool allows the selected object to be deleted and presents a confirmation message before completing the action.

- **Add Feature:** This tool allows the user to create a feature on the currently selected layer. The user must choose from available options (for example, a zone designation) before the zone feature can be drawn.
- **Snapping Tool:** Use this tab when drawing. Select the **Enable Snapping** option, and select a layer on which to apply the snapping function. While drawing, press the Ctrl key to snap.
- **Layer Transparency:** Use this tab to adjust the transparency of the selected layer.

Locating records


Community Development provides multiple tools to find records, including simple search, advanced search, and search by assessor parcel number (APN).

Global search

Use the search field in the Community Development header to perform a simple search.

1. Enter the word, phrase, or number you want to search for.




2. Select  or **Go** to search for all records that contain your criteria. Community Development searches the following fields for records that match your search text: parcel number, alternate site ID, record number, site address, city, owner name, company name, and description. Results appear in the **Global Search** dialog box.

Depending on your agency's WUM settings, if you initiate a search while in Land Management, the **Tax Map# Search** dialog box might appear instead of the **Global Search** dialog box. In this case, the remaining steps in this procedure do not apply. For more information about the Tax Map# Search feature, see [Search by APN](#).

The following WUM options control the Tax Map# Search feature:


- **Enable Tax Map# Search**
- **While in Land Management clicking on the Global Search textbox instantly opens the Tax Map# Search window**

For more information about these options, contact your system administrator or refer to the *Community Development WUM guide*.

3. In the **Global Search** dialog box, you can make the following selections:
 - Change your search term. Type a word, phrase, or number in the **Search** field and then select **GO**.
 - Open the Search by Tax Map# feature. Select **Search by Tax Map#**. This option appears only if the Search by Tax Map# feature is enabled in WUM. For more information about this feature, see the [Search by APN](#) section.
 - Open the Advanced Search feature. Select the **Advanced Search** link.
 - Narrow your results to a specific module. In the **Filter by** field, select a module.
 - Save a default module to search. Select the module you want to search by default and then select  to save the selected filter as the default. After you save a default, search results are limited to the module you selected and saved. At any time, you can expand search results to other modules by changing the **Filter by** field or you can select a different





















module or **All Modules** and save your new selection as the default.

The  button appears only when the **Filter by** field is different than your saved setting.

- Limit the number of results or view all results. Select the **Limit to x records** check box to limit results to the number of records you selected in the **# of Global Search Rows** option in user **Options > Search**. Clear this option to see all results that match your search term.
- View a record. In the **Record #** column, select the link.
- View the record's location on a map. Select . This option might not be available for some records.

Global Search

Search: ☐ Search GIS [Search by Tax Map#](#) | [Advanced Search](#) Filter by: All Modules ☒ Limit to 200 records

Record #	Status	Result	Source	Type	Address
 ANEX1903-0001	RECEIVED	123 "MAIN" ST.	Site Address	ANNEXATION	 123 "Main" St.
 CUSE2013-0001	APPROVED	342 MAIN ST	Site Address	CONDITIONAL USE PERMIT	 342 MAIN ST SANTA CRUZ
 DEVP1711-0001	ACTIVE	123 MAIN STREET A	Site Address	DEVELOPMENT PERMIT	 123 Main Street A San Diego
 DEVP2013-0009	RECEIVED	AKIN GERMAINE GRANGER TRUSTEE	Owner name	DEVELOPMENT PERMIT	 1003 CEDAR ST SANTA CRUZ
 DPLR1603-0001	RECEIVED	342 MAIN ST	Site Address	DEVELOPMENT PLAN REVIEW	 342 MAIN ST SANTA CRUZ
 PAPP1603-0006	RECEIVED	123 MAIN STREET A	Site Address	PREAPPLICATION	 123 Main Street A San Diego
 PAPP1604-0001	RECEIVED	318 MAIN ST	Site Address	PREAPPLICATION	 318 MAIN ST SANTA CRUZ
 PAPP1604-0002	RECEIVED	342 MAIN ST	Site Address	PREAPPLICATION	 342 MAIN ST SANTA CRUZ
 PAPP1604-0003	RECEIVED	342 MAIN ST	Site Address	PREAPPLICATION	 342 MAIN ST SANTA CRUZ
 PAPP1709-0015	UNDER REVIEW	1456 MAIN ST	Site Address	PREAPPLICATION	 1456 Main St San Diego

Close

Total Record Count: 200

Search by APN

If your agency enabled the Search by Tax Map# feature in WUM, you can use the **Search by Tax Map#** link in the **Global Search** dialog box to search for records by APN. When you select **Search by Tax Map#**, the **Tax Map# Search** dialog box appears. The dialog box includes a separate box for the parts of the APN you can search, as set up in WUM by your system administrator. In the applicable box, enter the text you want to find and then select **OK**.

Tax Map# Search

*APN part 1

APN part 2

APN part 3

*Asterisks before labels denote a required field. These must be filled in with at least 1 character to execute a Search.

Search results appear in the **Global Search** dialog box.

The following WUM options control the Search by Tax Map# feature:

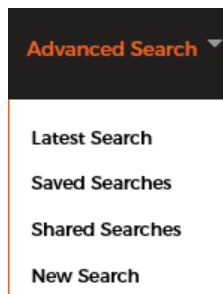
- **Enable Tax Map# Search**
- **While in Land Management clicking on the Global Search textbox instantly opens the Tax Map# Search window**
- **Enable the ability for Community Development to read SiteAPN's as they are instead of formatting them**
- Tax map number search listing

For more information about these options, contact your system administrator or refer to the *Community Development WUM guide*.

Advanced search

Advanced Search provides powerful search and ad hoc reporting capabilities by enabling you to choose multiple custom search criteria for a selected module and customize the layout of the search results. You can save searches for your own use and share searches with others in your agency.

Searches return data from the main table (and custom fields) that match the criteria, along with the count of the rows in the subtables that match the search criteria (for example, search for permits in the Permitting module, or projects in the Projects and Planning module).



To perform an advanced search, point to **Advanced Search** in the Community Development header and select one of the following options from the menu:

- **Latest Search:** Select **Latest Search** if you want to use parameters from the most recent search you performed.
- **New Search:** Select **New Search** if you want to manually select all criteria for a custom search (ad hoc search). The **Advanced Search** page appears so you can select criteria and perform your search. For more details about ad hoc searches, see [Ad hoc search](#).
- **Shared Searches:** Point to **Shared Searches** if you want to use a search that was previously saved and shared with a group in your agency. A list of shared searches appears. Select the search you want to perform. The **Advanced Search** page appears showing the shared search criteria. For more details about shared searches, see [Shared Searches tab](#).

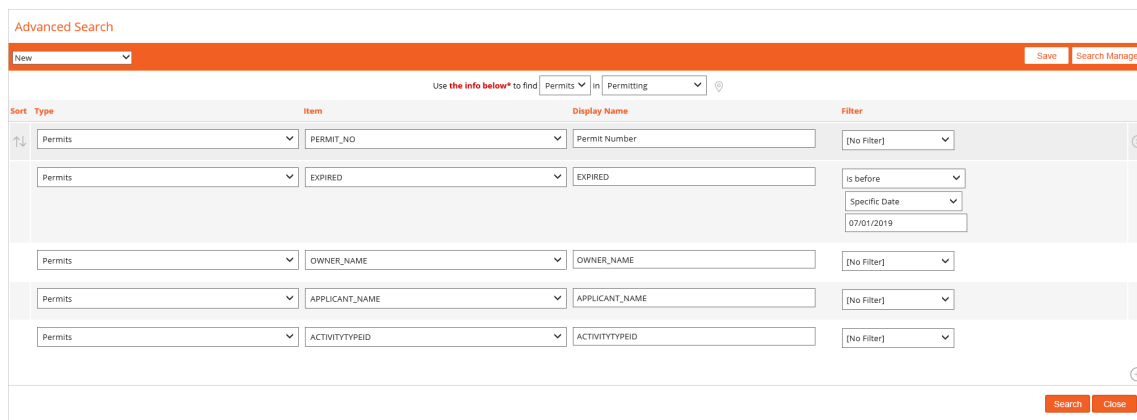
- **Saved Searches:** Point to **Saved Searches** if you want to perform a search that you previously saved. A list of saved searches appears. Select the search you want to perform. The **Advanced Search** page appears showing the saved search criteria. For more details about saved searches, see [Saving searches](#) and [Using saved searches](#).

Ad hoc search

Use the **New Search** option on the **Advanced Search** menu to manually select criteria for a custom search. After you select search criteria, you can save or share the search.

Main table (activity search) example

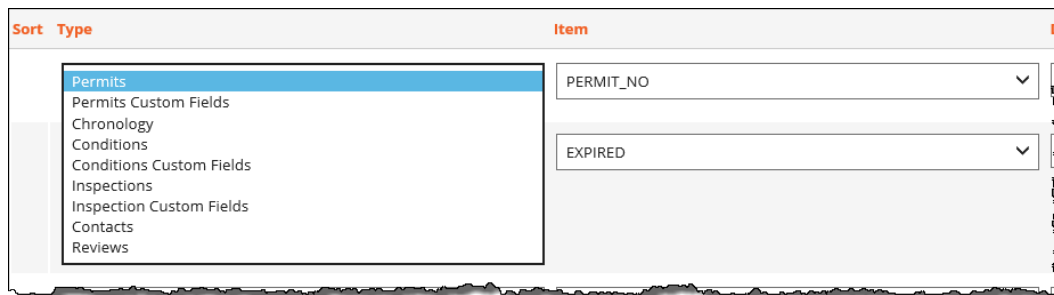
The steps below provide an example of searching the main table (searching an activity record).



1. On the **Advanced Search** page, select the module you want to search.

Use **the info below*** to find Permits in Permitting

2. Select an option in the **Type** column. This indicates the database table you want to search.



3. Select an option in the **Item** column. These options are the available fields (columns in the database table) for the type you selected.
4. In the **Display Name** column, enter the column header as you want it to appear in the search results.

5. Select an option in the **Filter** column. These options enable you to type or select specific values or a range of values to narrow results. Additional fields appear if applicable to the search field and your selection in the **Filter** field. For example, if you include a date field in your search and then select **is** in the **Filter** field, additional fields appear so that you can choose a specific date.

Filter

is
▼

Specific Date
▼

Note: You can use the underscore (`_`) in text fields for the following purposes:

- To replace special characters that cannot be entered in filter text fields. Enter an underscore (`_`) in place of disallowed special characters. For example, you cannot enter `@` in filter text fields. To search for the email address `info@example.com`, type **info_ example.com**.
- As a wildcard character to replace a single character when you select the **begins with**, **ends with**, or **contains** option.

Important: The underscore works as a wildcard only for text fields used with the filter options listed. For example, if you include status in your search, and select **begins with** in the **Filter** field, and then type `_en` in the text field, results will include records with a status of **Pending** or **Renewal**, but not **Delinquent**.

6. Select + to add another search parameter to your search.
7. Select × to delete a search parameter.
8. Repeat steps 2–7 as necessary.
9. Adjust the order of the fields by selecting ↑↓ in the row you want to move and dragging the row up or down.

Tip: The order of the search criteria list determines the order of the columns in the search results.

10. Select a table. The options in this field depend on the search criteria you selected.

Use **Flat Fee*** ⓘ to find

Licenses
Chronology
Conditions
Inspections

in

Licensing
▼

Ⓜ

ay Name

11. Select **Search**. The search results appear.
12. Some search results contain hyperlinks that you can use to drill down to the subactivity level. Select the link to open a pop-up window that contains more information.

Advanced Search

Edit Search New Search Export Map Browse Save Search Manager

Now displaying **Unsaved Search*** results as of 7/3/2019 2:36 PM

	EXPIRED	OWNER_NAME	APPLICANT_NAME	ACTIVITYTYPEID	Conditions
	03/04/2019	No Company		1	0
	12/31/2018	UNIVERSITY BUSINESS PARK LLC		1	0
	04/09/2016			1	0
	04/18/2016			1	0
	05/30/2016		Jones Enterprises, LLC	1	0
	03/15/2017			1	2
	10/30/2017			1	0

Advanced Search Drilldown - Internet Explorer

Displaying Conditions data for key field value "BCOM16-00011"

CONDITION_TYPE	EXPIRED	OWNER_NAME	APPLICANT_NAME	ACTIVITYTYPEID
BLD SMOKE DETECTOR REQUIREMENTS	03/15/2017			1
BLD HOURS OF WORK	03/15/2017			1

Subtable (subactivity search) example

The images below show an example of searching a subtable (searching a subactivity record).

Criteria List

Advanced Search

Flat Fee Flat Fee Use Flat Fee* to find Licensing Licensing

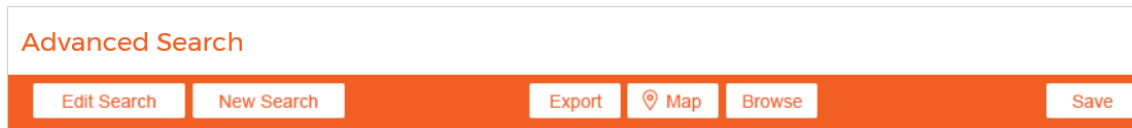
Sort Type Item Filter

Licenses	BALANCE_DUE	BALANCE_DUE	[No Filter]
Chronology	ACTION_DATE	ACTION_DATE	[No Filter]
Conditions	CONDITION_TYPE	CONDITION_TYPE	begins with a
Inspections	INSPECTIONTYPE	INSPECTIONTYPE	[No Filter]

Search Close

Advanced Search tools

When your search results appear, use the Advanced Search tools to edit your search, start a new search, export search results, browse search results in a separate window, plot search results on a map, and save your search results.



- Select **Edit Search** to view and change current search parameters.
- Select **New Search** to return to the initial query page that has no search parameters selected.
- Select **Export** to save your search results in a Microsoft Excel file.

Note: When you use the Export function, the following message might appear in Microsoft Excel:

"The file format and extension of 'RadGridExport.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?"

Microsoft Excel displays this message as a security measure against potentially harmful files. Because Community Development is a trusted source, select **Yes** to continue with the export.

- Select **Map** to display your search result locations as pushpins on the GIS map.
- Select **Browse** to open the search results in a separate window. This enables you to work with search results or start another search while retaining the results list.
- Select **Save** to save your search results.

The footer area of the search results shows the total number of records found and the number of pages of results. This area also includes navigation links so you can review the results.

« First < Prev Page 1 of 113 Next > Last »

Records 1 to 25 of 2801

- Select « **First** to navigate to the first page of results.
- Select < **Prev** to navigate to the previous page of results.
- Select **Next** > to navigate to the next page of results.
- Select **Last** » to navigate to the last page of results.

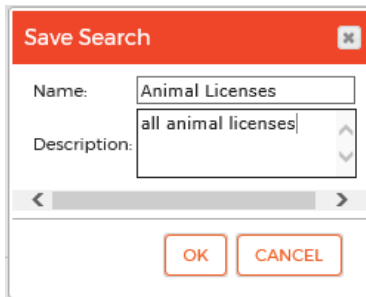
Saving searches

If you often search using the same criteria, you can store the set of search criteria as a saved search. Use the saved search when you need to produce a listing or report of records that meet the

criteria.

To save a search, complete the following steps:

1. Select all the parameters you want to include in your search.
2. Select **Save**.
3. In the **Name** field, enter a name for your search.
4. In the **Description** field, enter a description or purpose of this search.



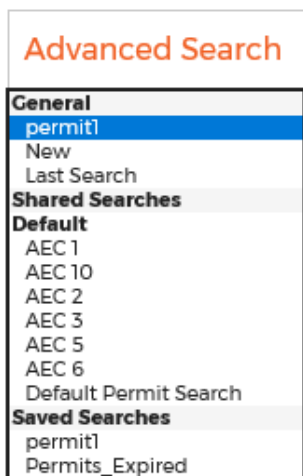
A dialog box titled "Save Search" with a close button (X) in the top right corner. It contains two text input fields: "Name:" with the text "Animal Licenses" and "Description:" with the text "all animal licenses". Below the fields is a horizontal scrollbar. At the bottom are two buttons: "OK" and "CANCEL".

5. Select **OK**. The search is saved and is available from the search list.

Using saved searches

The search list includes general, shared, default, and saved searches. The list under **General** includes the following options:

- Current search. This can be a saved search or unsaved search.
- **New**. Select this option to reset the search parameters to default options so you can build a new search.
- **Last Search**. Selection this option to use parameters from the most recent search you performed.



A dropdown menu titled "Advanced Search" in orange text. The menu is open, showing a list of search options. The "General" section is highlighted in blue and contains "permit1", "New", and "Last Search". Below this is the "Shared Searches" section, followed by the "Default" section which lists "AEC 1", "AEC 10", "AEC 2", "AEC 3", "AEC 5", "AEC 6", and "Default Permit Search". The "Saved Searches" section is at the bottom and lists "permit1" and "Permits_Expired".

Select the search you want to use.

Tip: If a description of the search is saved in WUM, ⓘ appears next to the search name. Point to the icon to view a tooltip.

Use **Flat Fee*** ⓘ to find in ⓘ

If you select a saved search, you can edit the search parameters or use the search as is. If you edit the saved search, you can resave it to permanently update the search criteria for that saved search.

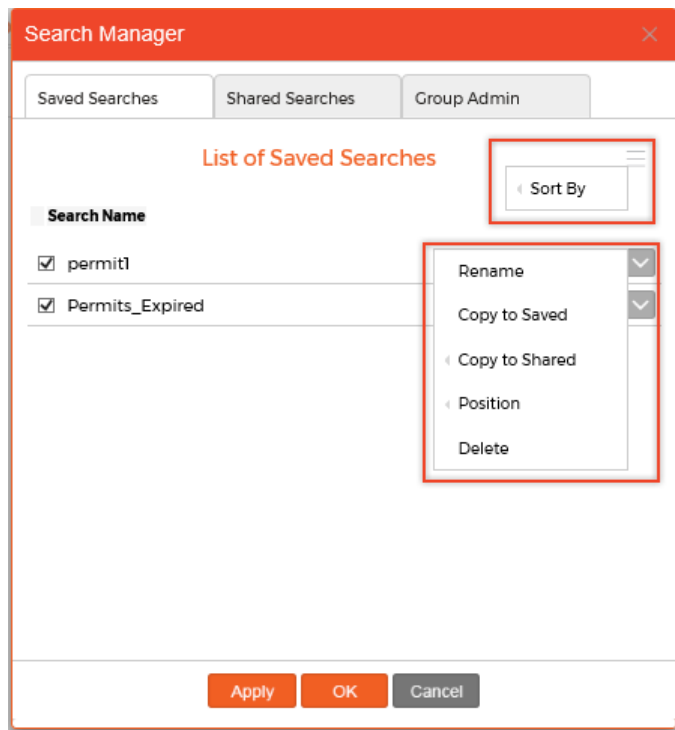
After you select all search parameters, select **Search**. The search results appear.

Search Manager

Use this feature to save searches, set up search user groups, and share searches with search user groups. Select **Search Manager** to open the **Search Manager** dialog box.

Saved Searches tab

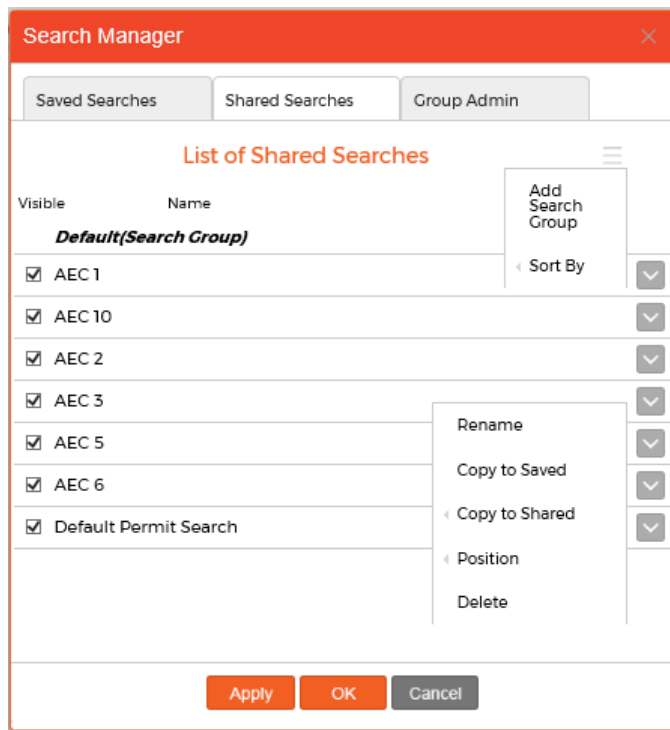
After you save a search, it is listed on this tab. You can sort the list of saved searches and also rename, copy, reposition, and delete saved searches.



Shared Searches tab

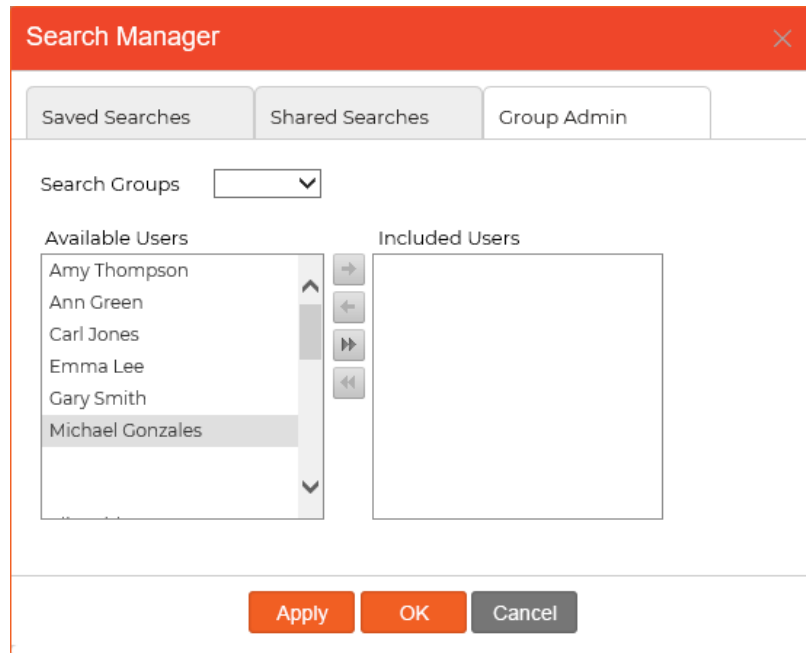
After a search is shared, it is listed on this tab. You can organize the list by adding to, searching for, grouping, and sorting the search list. You can rename, copy, reposition, or delete each saved search.

Note: To use a shared search in ALP processing, copy that search to the Advanced License Processing (ALP) group. For more information about ALP, see [Advanced License Processing](#).



Group Admin tab

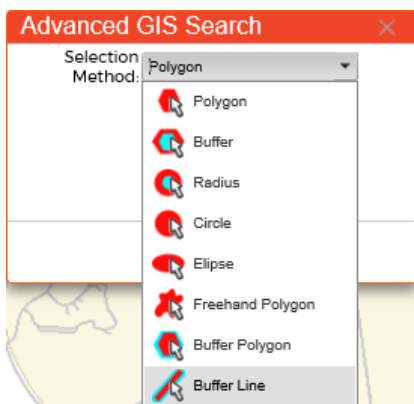
Set groups by moving users from the **Available Users** column to the **Included Users** column. Shared searches are available to the defined group.



Advanced GIS Search

Select the **Advanced GIS Search** tool (📍) to use a map to add or change geographical boundaries for your search.

1. Choose a selection method.



2. Draw the selected shape on the map. For details about drawing shapes, see [Multi-Select](#)

[tool](#).

3. When the advanced search window appears, select the parameters.

Adding records

Community Development records manage information associated with various departments, including:

- Locations, such as parcels, buildings, and suites (Land Management)
- Activities that occur at locations, such as permits (Permitting), projects (Projects and Planning), code enforcement cases (Code Compliance), and licenses (Licensing)
- People and businesses associated with activities, such as architects, engineers, and contractors (Entity Management)

Land Management

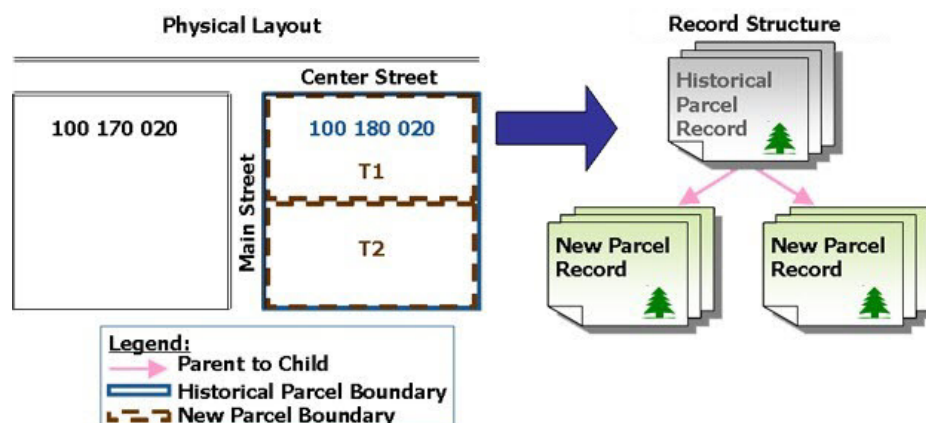
About Land Management records

Land Management records manage information associated with locations within a municipality, including parcels, buildings on parcels, suites within buildings, historical parcels that have since been subdivided, or any combination of these. Additionally, Land Management records can be linked to each other in parent-child relationships.

When adding a Land Management record, you must choose to either duplicate an existing parcel number (if the parcel number is not changing) or use a temporary parcel number (if the parcel number is changing). Depending on your setup, Community Development might automatically generate a temporary parcel number or you might enter the parcel number manually.

Example 1: Subdivided parcels

You have a new subdivision that has been approved for development, and an existing parcel (Parcel 100 180 020) is being split into two parcels. You might want to retain all historical information about the original parcel but issue permits on the new parcels. In this example, there are three potential Land Management records: the historical parcel and the two new parcels. The two new parcels might be created as subrecords of the original parcel and the status of the original parcel might be set as inactive. Also, since the parcel numbers might be changing, you might add the new parcels using temporary parcel numbers (Parcels T1 and T2).

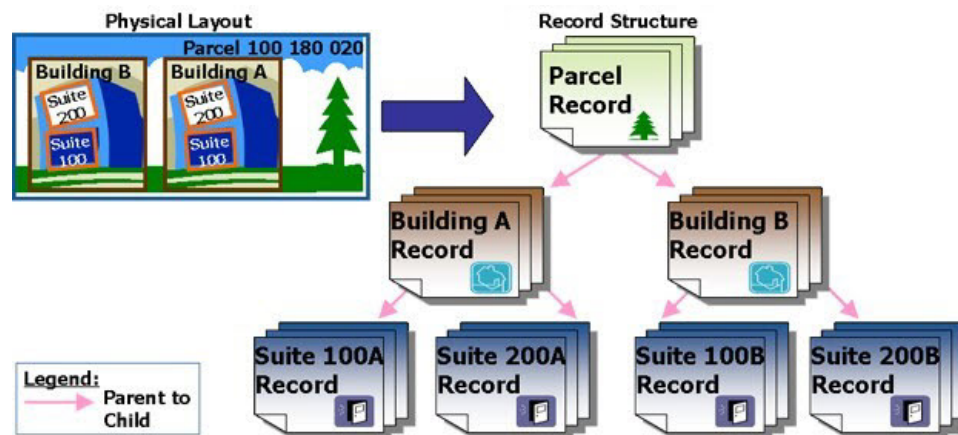


Example 2: Parcels with multiple units

You have a parcel (Parcel 100 180 020) with two buildings (Buildings A and B) on it, and each building has two suites in it (Suites 100 and 200). In this example, there are seven potential Land Management records:

- Parcel 100 180 020
- Building A
- Building B
- Suite 100A
- Suite 200A
- Suite 100B
- Suite 200B

Also, Suites 100A and 200A are subrecords (children) of Building A, Suites 100B and 200B are subrecords of Building B, and Buildings A and B are subrecords of Parcel 100 180 020. The building and suite subrecords might have the same parcel number as the main parcel record, so you might choose to duplicate the existing parcel number when creating the subrecords.



Adding Land Management records

To add a Land Management record, complete the following steps:

1. Go to Land Management.
2. Point to the Land Management functions menu on any record and then select **Add Record**.
3. Perform one of the following options for adding Land Management records:
 - To add a subsite of the current parcel with a temporary parcel number: Select **Sub location linked to this record** and select **None** from the **Site APN** field. (In Example 1, use this option to create Parcel T1 as a subrecord of Parcel 100 180 020.)

- To add a subsite of the current parcel with the same parcel number as the current parcel: Select **Sub location linked to this record** and select **None** from the **Site APN** field. (In Example 2, use this option to create Building A as a subrecord of Parcel 100 180 020.)
 - To add a record with the same parcel number as the current parcel: Select **New Location** from **Create New** and select **Copy Current** from the **Site APN** field. (In Example 2, use this option to create Building A without a link to main Parcel 100 180 020.)
 - To add a record with a temporary parcel number: Select **New Location** from the **Create New** field and select **None** from the **Site APN** field. (In Example 1, use this option to create Parcel T1 without a link to historical Parcel 100 180 020.)
4. Enter an ID in the **Site Alternate ID** field.
 5. Select an option in the **Record Type** field, if applicable. (In Example 2, you might select **Building** for Building A.)
 6. Select the number of records to add.
 7. Select **Add**.

Importing parcel data from GIS

Use this feature to add parcel data from GIS to a new Land Management record in Community Development.

Before you can use this feature, set up the **Parcels** geotype in WUM **System Settings > Interfaces > Spatial Connect**.

To use the Import from GIS feature, complete the following steps:

1. Log in to Community Development.
2. Go to Land Management.
3. From the main information pane's functions menu, select **Import from GIS**.
4. In the **Search** field, enter the APN (assessor parcel number) of the parcel you want to add to Community Development.
5. Select **GO**.
6. A message appears indicating the status of the import, which can be one of the following scenarios:
 - Parcel added to Community Development: The parcel was not in Community Development but was in GIS. The parcel data was imported.
 - Parcel exists: The parcel already exists in the Community Development database, so no parcel data was imported. Search by parcel (APN) number to find the existing record.
 - Parcel does not exist in GIS: The parcel is not in Community Development or GIS, so no parcel data was imported. Verify the APN.

Select **OK** to close the message.

7. To close the dialog box, select ✕. If the record was added, you can find the new record by searching for the APN in the **Search** field or the Advanced Search feature.

Adding activity records

You can add activity records for permits, projects, cases, issues, and licenses. You can add activity records with or without a link to a Land Management record unless your agency requires that activity records are linked to a Land Management record. Contact your system administrator to find out the requirements for your agency.

To add an activity record linked to a Land Management record:

1. Locate the Land Management record.
2. On the Land Management functions menu, select **Add Record**.
3. In the **Create New** field, select the type of record (for example, **Permit linked to this record**). Available options vary by user based on the module and user privileges.
4. Select options or type values for the remaining fields in the dialog box. Fields vary based on your selection in the **Create New** field and can include:
 - **Record Type**
 - **Site APN**
 - **Site Alternate ID**
 - **Record Subtype**
 - **Prefix**
 - **Description**
 - **Licensee Name**
 - **Number of Records**
 - **Sync Sub-Projects**
 - Options for adding multiple subprojects linked to the parent record
5. Depending on the type of record you are adding and the next action you want to take, select

Add, Save, or Save and Add Owner.

Add Record

Create New

New Project

Record Type

CONDITIONAL USE PERMIT RESIDENTIAL

Record Subtype

RESIDENTIAL (40 UNITS OR LESS)

Prefix

CUP

CONDITIONAL USE PERMIT

Year/Month

1907

Description

TR 53067

Number of Records

1

Sync Sub-Projects

☒ Set status To: APPROVED

Add Multiple subProjects Linked to Parent Record:

Record Type

ANNEXATION

Record SubType

INHABITED

+

Add

Cancel

Tip: Depending on your setup, you might use a year/month code in your record numbering format. For example, permit numbers for building permits entered in December 2019 might begin with B1912, where *B* is the prefix for building, *19* is the year code, and *12* is the month code. This option gives you a grace period to account for interruptions such as vacations and holidays. If you use the year and month in your record numbering format, this option is available at the beginning and end of each month. If you use the year only, this option is available at the beginning and end of each year. If applicable, select the year/month in which you want to track the record.

Adding activity records not linked to a Land Management record

Complete the following steps to add an activity record that is not linked to a Land Management record:

Notes:

This process is not available for projects, permits, and cases *if* your agency requires linking those record types to a Land Management record. Contact your system administrator for more information.

For details about adding Entity Management records, see [Contacts](#).

1. From the module main screen (for example, Permitting), point to the functions menu and select **Add Record**.

Tip: You can also access Add functions from the **Favorites** menu if you added those functions to your **Favorites** listing. For more information about adding features to your **Favorites** list, see [Favorites](#).

2. In the **Create New** field, select the type of record you want to add.

Note: The remaining fields available vary based on the module.

3. Enter details in additional fields, such as **Record Type**, **Record Subtype**, **Prefix**, **Description**, or **Licensee Name**. The fields vary depending on the Community Development module.

Note: A prefix might be required depending on your agency's configuration.

4. Depending on the type of record you are adding and the next action you want to take, select **Add**, **Save**, or [Save and Add Owner](#).

The site information on the new activity record is blank. This record can be linked to a Land Management record at any time by selecting the **Click to link to a Land Management Record** link.

Save and Add Owner function

If you are adding a license in the Licensing module or a linked license in Land Management, you have the option to go directly from the **Add Record** dialog box to the **Contacts** dialog box to add a contact type of *owner*. To use this feature, follow the steps in the previous sections for adding a record but select the **Save and Add Owner** button instead of **Save** or **Add**.

Tip: The **Save and Add Owner** button appears only when the **Create New** field is **New License** in the Licensing module or **License linked to this record** in the Land Management module.

If an owner contact already exists on the record, the owner's information appears in the **Contacts** dialog box. You can change this information if necessary. You can also search for an existing contact or add the new contact to Entity Management.

For information about adding a contact, see [Adding Contacts](#).

Adding subprojects and subpermits

You can add subactivity records for projects and permits when you add the parent record. To add subprojects or subpermits at the time the parent record is added, complete the following steps:

1. Locate the Land Management record.
2. Select **Add Record** from the functions menu.
3. Select either **Permit with Subs linked to this record** or **Project with Subs linked to this record**, depending on whether you are adding permit or project records.
4. Select **Create**.
5. Select the record type.
6. Select the subtype.
7. Select one or more subpermits or subprojects. For each subpermit or subproject, select an associated subtype.
8. Enter a description.
9. Each default contact type appears on a separate tab within the dialog box. Enter contact information for each contact type. The contact information you enter here is copied to every subrecord. For each contact type, you can:
 - Use the Search feature to find an existing Entity Management record or standalone contact
 - Add contact information and then select **Add to AEC** to add the contact to Entity Management with the information you entered
 - Add contact information without adding the contact to Entity Management

10. Select **Add**.

Add Multiple Records - USERSHAPE #JCM:2004060347030000
✕

Primary Permit Type APPLIANCE CHANGE OUT

Primary Permit Sub Type TANK WATER HEATER

Select Sub Permits

☐ APPLIANCE CHANGE OUT

☐ BUILDING COM

☐ BUILDING RES

☐ CJ TEST

Description

APPLICANT

CONTRACTOR

OWNER

Search

GO

Add to AEC

Name

Address 1

Address 2

City, State, Zip

Country

Phone

Fax

Cell

Email

Other Info

Add

Cancel

Duplicating records

Use the **Duplicate** function to add a record that has the same basic information as another record (in other words, copy a record). The **Duplicate** function works particularly well in the following scenarios:

- Using the Model prefix in Permitting when a contractor has a reviewed and approved floor plan that will be built more than once. Use the Model prefix to add and track the basic information, plan reviews, and approvals for the first permit, and then add duplicates of the model permit for each subsequent permit with the same floor plan.
- Correcting an application or issue that was submitted in eTRAKiT with the wrong record type or subtype.

Duplicating a record makes a copy. The original record remains in Community Development with all its information, including paid fees and bonds. If you are duplicating a record to correct an error, you might need to adjust the original record as follows, according to your agency's policies:

- Manually close or delete the original record.
- Refund or void the paid fees and paid bonds on the original record.

| To duplicate a record:

1. Go to the record you want to duplicate.
2. From the functions menu, select **Duplicate**. The **Duplicate Record** dialog box appears. In this dialog box, the **Create New** field defaults to **Duplicate of this record**.
If you select a different option in the **Create New** field, the dialog box changes to the **Add Record** dialog box. For an overview about adding records, see [Adding records](#).
3. If you want the new record to have a different type or subtype than the original record, select the new type from **Record Type** or the new subtype from **Record Subtype**.
If you do not want to change these fields, skip this step.
If you change the type or subtype, some components cannot be copied to the new record. For more details, see step 7.
4. By default, the **Prefix** field contains the prefix that corresponds to the record type. If you want to change the prefix used for the record number, select a different prefix from the drop-down list.
5. In the **Number of Records** field, select the number of records you want to add.
6. Select options in the remaining drop-down and date fields. These fields vary by module.
7. Select which components of the source record you want to copy to the new record. Select the check box for components you want to copy. Clear the check box for components you do not want to copy. The components vary by module.

In modules that allow you to copy contacts, select the **Copy Default Contacts** check box to copy the contacts that are defined in WUM as default contacts for the activity record type. If you select the **Copy Default Contacts** check box, the **Include Added Contacts** check box is enabled. Select this check box to copy all contacts you added to the source record in addition to the default contacts for the activity record type.

If you changed the record type or subtype, the following components cannot be copied to the new record:

- Unpaid fees. Paid fees can be copied to the new record, but unpaid fees cannot.
- Inspections.
- Chronology.

- Conditions.
- Reviews.
- Unpaid bonds. Paid bonds can be copied to the new record, but unpaid bonds cannot.

8. Select **Add**.

Notes:

- If you changed the record type or subtype, any automatic fees, inspections, reviews, or other workflow items defined in WUM for the record type and subtype are added to the new record.
- If you set the **Applied** date (Permitting, Projects and Planning, or Licensing) or **Opened** date (Code Compliance) to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue and add the duplicate record. Select **Cancel** to return to the **Duplicate Record** dialog box and change the date.
- When you duplicate an entity record, you must select whether the duplicated record is numbered manually or automatically. Select automatic numbering for contacts that do not have a state registration number (for example, architects). Community Development assigns a unique registration number to the contact. Select manual numbering for state-registered contractors. If you select manual numbering, enter the contractor's registration number in the box. CentralSquare recommends using the contractor's state registration number as the Community Development contact number whenever available.

Changing type or subtype

You can change the record type or subtype for an existing record by using the **Edit Type/Subtype** function.

When you change the type or subtype for a record:

- Automatic workflows are disabled. All fees, inspections, reviews, and contacts that would be added automatically to a new record must be added manually after you change the type or subtype.
- The change is logged in audit history.
- The prefix in the record number does *not* change.

Tip: If you want to retain automatic workflows or change the prefix in the record number, you can use the **Duplicate** function. For more information, see [Duplicating records](#).

| To change the type or subtype for a record:

1. Go to the record you want to work with.
2. In the main information pane, from the functions menu, select **Edit Type/Subtype**.

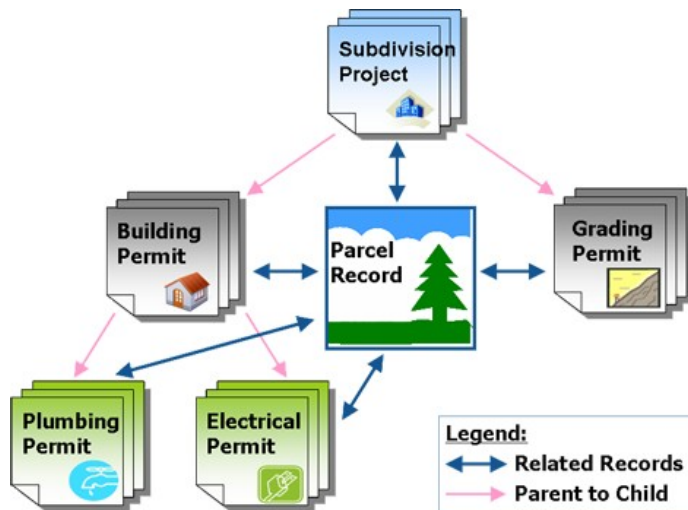
Note: In Land Management, the option is **Edit Type**. Land records do not have subtypes.

3. To change the type, select an option from the **Set Type** drop-down list.
4. To change the subtype, select an option from the **Set SubType** drop-down list.
5. Select **Save**.
6. Add fees, inspections, reviews, or contacts as needed for the new record type or subtype and your agency's policies. Automatic workflows are disabled when you change the type or subtype, and so these items are not added automatically.

Linking records

Community Development records can be linked together in a number of ways:

- Permit, project, case, license, parcel, and CRM records can be linked to a Land Management record. Linked records can be accessed directly through the **Tree** or **Site** tabs in the **Navigation** pane.
- Permit, project, case, and property records can be linked in parent-child relationships. For example, a building permit might have a subpermit for electrical work. In this example, the main building permit is the parent record and the electrical permit is the child record.




- Case records can be linked to one another.
- An association can be established between entity records and permit, project, case, and license records that allows you to navigate to related permits or pay fees on related records directly from an entity.

Linking records

To link records, complete these steps:

1. Locate a record that you want to link from.
2. Select **Click to link to a Land Management Record**.

 **Licensing**

☒ **BLPM2019-018**

Status

PENDING

Type

FIREWORKS BOOTH PERMIT

SubType

☒ **Click to link to a Land Management Record**

Type

Address

3. Locate the record using the Search feature.
4. Select the record number in the results listing.

Link To...











Search:

B-

Permit

GO

☒ Limit to 1000 records

Record #	Result	Source	Type
 BCOM2013-00009	B3385520-9BE4-44CF-B87B...	Alternate ID	BUILDING COM
 BCOM2013-00015	F099573E-853C-426A-932B...	Alternate ID	BUILDING COM
 BCOM2013-00033	A048B9D8-005D-4147-A4E...	Alternate ID	BUILDING COM
 BCOM2016-00008	8B213B4D-6398-4C4C-89FB...	Alternate ID	BUILDING COM
 BLD16-00004	B003E71A-95B0-4309-B57B...	Alternate ID	NEW APPLIANCE
 BLD17-00133	26F59B70-FFA0-4C3F-BD9B...	Alternate ID	APPLIANCE CHAN...
 BLD17-00134	F95E3614-43FA-456E-81FB...	Alternate ID	APPLIANCE CHAN...
 BLD17-00135	26F59B70-FFA0-4C3F-BD9B...	Alternate ID	APPLIANCE CHAN...
 BLD17-00137	1A3B1567-732B-42F8-AC89...	Alternate ID	APPLIANCE CHAN...
 BLD17-00138	26F59B70-FFA0-4C3F-BD9B...	Alternate ID	NEW APPLIANCE

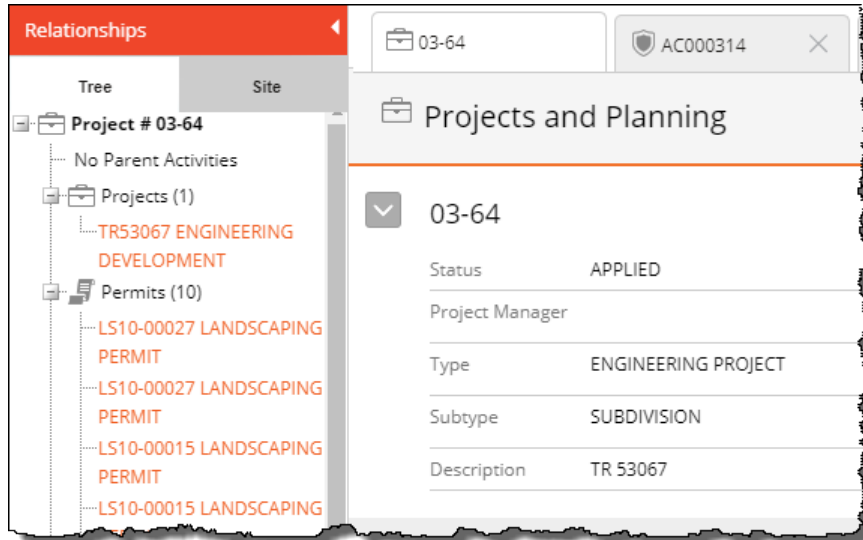
Total Record Count: **127**

Close

5. Select **OK** to confirm the link.

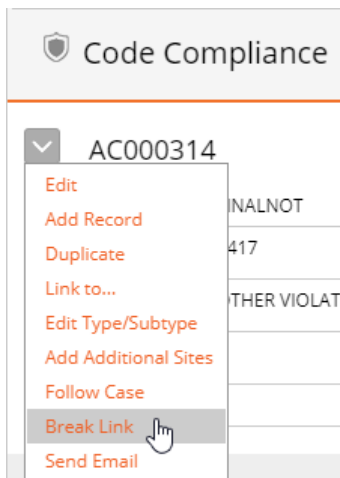
Breaking a link

Existing links appear in the **Tree** tab for related permits and the **Site** tab for additional sites.

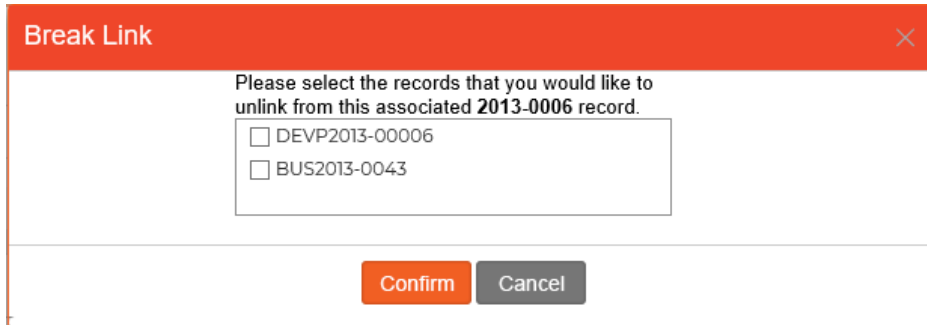


To break a link, complete the following steps:

1. From the functions menu, select **Break Link**.



2. Select the records you want to unlink and then select **Confirm**.



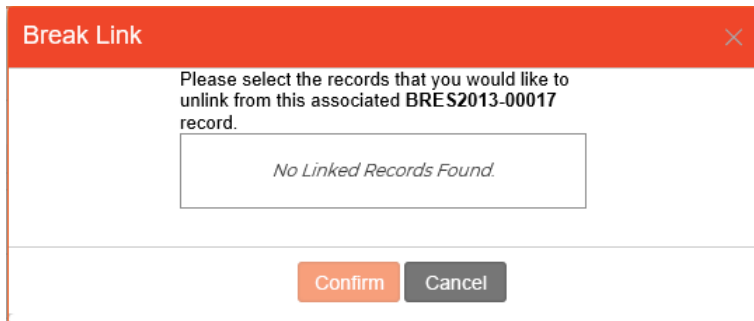
Break Link [X]

Please select the records that you would like to unlink from this associated **2013-0006** record.

- ☐ DEVP2013-00006
- ☐ BUS2013-0043

Confirm **Cancel**

3. Verify all links were broken by viewing both the **Tree** tab and **Site** tab. Or, select **Break Link** from the functions menu and verify that the unlinked records are not in the list.



Break Link [X]

Please select the records that you would like to unlink from this associated **BRES2013-00017** record.

No Linked Records Found.

Confirm **Cancel**

Linking an activity record to a Land Management record

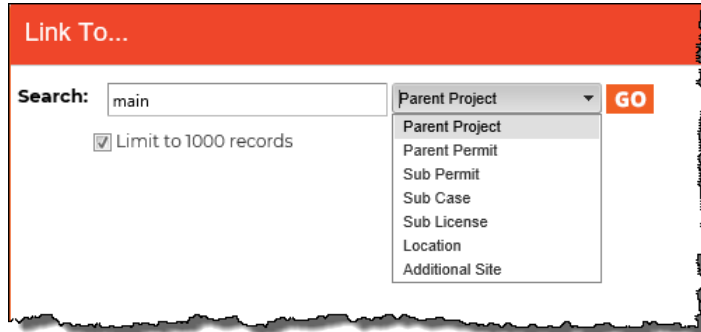
Adding a permit, project, or case through Land Management automatically establishes a link between the Land Management record and the Permitting, Projects and Planning, or Code Compliance record.

Note: If your agency is set up to require permits, projects, and cases to be linked to a Land Management record, you must follow the procedure in the [Adding activity records](#) section for adding an activity record linked to a Land Management record.

To link a permit, project, case, issue, or license record to a Land Management record, complete the steps below.

1. Locate the activity record.
2. Point to the functions menu and then select **Link to Land Management**.
3. Locate the Land Management record using the Search feature.
4. Select a record number in the results listing to automatically populate the site information.
5. Select **OK** to confirm the link.

To link additional site records to a single permit, project, or case, select **Link To** on the functions menu and then select **Additional Site**.

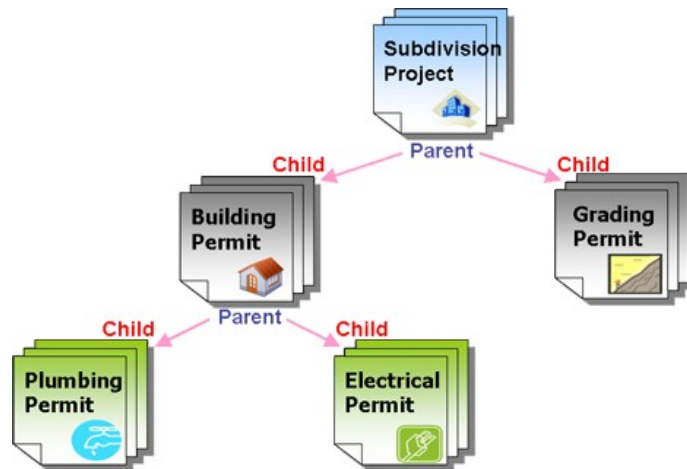


Tips:

- Additional site records are listed on the **Site** tab in the **Navigation** pane.
- **Refresh from Land Management** updates the site information and owner information from the linked Land Management record.

Parent-child relationship

Records can be linked together in a parent-child relationship. You can establish this link by adding a linked record or linking existing records.

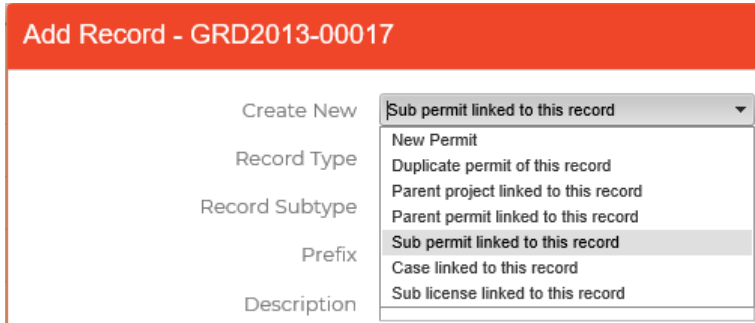


Adding linked records

To add a linked record, complete the following steps:

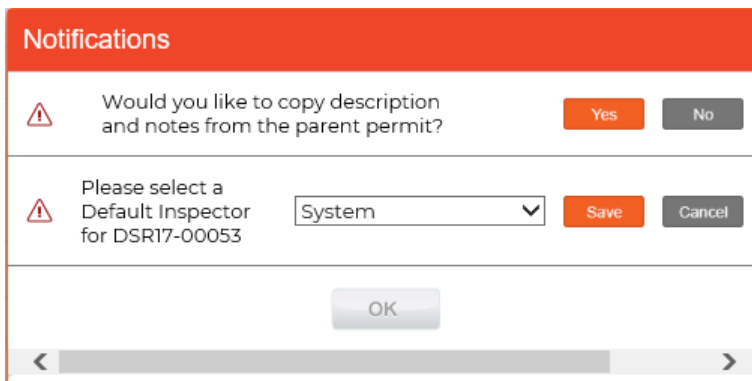
1. Locate the existing record.
2. Select **Add Record** from the functions menu.

3. In the **Create New** field, select the option to add a subrecord. For example, in the Permitting module, select **Sub permit linked to this record**.



Note: If you add a subpermit linked to an existing permit (for **Create New**, you select **Sub permit linked to this record**) and the link-to permit is linked to a project, the new subpermit is also linked to the project.

4. Complete fields in the dialog box. The fields vary depending on the module.
5. Select **Add**.
6. Select whether to copy information from the parent record to the new record.
7. Select other options as available and save your settings. For example, for a subpermit, select a default inspector and then select **Save**.



8. Select **OK**.

Linking existing records

1. Go to the record.
2. Select **Link To** from the functions menu.
3. Select the type of link relationship from the **Link To** menu.
4. Locate the record using the **Search** feature.

5. Select the record number in the results listing.
6. Select **OK** to confirm the link.

Linking case records

Case records can be cross-linked to each other.

Adding linked case records

To add a case record that is linked to an existing case record:

1. Locate the existing record in the Code Compliance module.
2. Select **Add Record** from the functions menu.
3. Select **New linked case to this record** from the **Create New** field.

Add Record

Create New: New Case

Record Type: New Case, Duplicate case of this record, **New linked case to this record**, Parent project linked to this record

Record Subtype: BC BUILDING

Case Name:

Number of Records: 1

Add **Cancel**

4. Select a record type.
5. Select a prefix.
6. Enter a description.
7. Select the number of records you want to add.
8. Select **Add**.

Associating activity records with Entity Management records

Associations between Entity Management records and activity records such as permits, projects, cases, and licenses enable you to navigate to related records directly from Entity Management. Creating an Entity Management record through the **Contacts** pane of the activity record automatically makes an association.

In order to preserve historical information, contact information about individual activity records is not updated automatically when the associated Entity Management record is updated. You can choose

to update individual contacts as needed.

For more information about using Entity Management records as contacts, see [Adding contacts](#).

Locking records

Community Development can lock records as follows:

- Lock Land Management records to freeze activity for a property that has an outstanding issue on a permit, project, or case record.

When a Land Management record is locked, no records can be created from or linked to that property and a red flag appears on the property record and on all linked permit, project, and case records.


For more details, refer to [Locking a record through an activity](#) and [Locking a record through Land Management](#).

- Lock fees so that fees cannot be paid on an activity record that has a transaction with a status of **AwaitingResponse** or **TimedOut**. This feature is controlled by the **Lock Fees associated to outstanding transactions** check box in WUM. For more details, refer to the *Community Development WUM guide*.

Locking a record through an activity

Your agency might choose to lock a Land Management record when there is an outstanding issue on a permit, project, or case that is linked to the property. Depending on your setup, an outstanding issue is identified by certain status codes in Permitting, Projects and Planning, and Code Compliance. For example, your agency might choose to lock a property that is in violation of a code (Code Compliance status of Non-compliance). When a permit, project, or case record is set to one of these record-locking status codes, the property is locked by the activity.

To lock a property record through an activity, complete these steps:

1. Locate the permit, project, or case record with an outstanding issue in Permitting, Projects and Planning, or Code Compliance.
2. Ensure that the record is linked to Land Management.
3. Edit the record's status and select a lock status (as defined by your system administrator).
4. Select **Save**. The linked Land Management record is locked. All records linked to the property are displayed .

To unlock a property record locked by an activity, complete these steps:

1. Locate the permit, project, or case record with an outstanding issue in Permitting, Projects and Planning, or Code Compliance.
2. Edit the record's status and select a non-locked status (as defined by your system administrator).
3. Select **Save**. The linked Land Management record is unlocked.

Locking a record through Land Management

To lock a property record manually through Land Management, complete the following steps:

1. Go to the record in Land Management.
2. Select **Edit**.
3. Select a lock status (as defined by your system administrator).

The screenshot shows the 'Land Management' interface. At the top, there's a header 'Land Management' with a globe icon. Below it, a dropdown menu shows '302-001-190'. The main area is a table with columns 'Type', 'ADDRESS', 'Status', and 'Improvements'. The 'Type' column has a value 'Land'. The 'ADDRESS' column has a value '0'. The 'Status' column has a dropdown menu open, showing options: 'ACTIVE', 'INACTIVE', 'LOCKED', and 'TEST'. The 'LOCKED' option is highlighted.

4. Select **Save**.

Tips:

- If you lock a record manually through Land Management, Community Development lists the record as being locked by status.
- Only system administrators or users with the CAN UNLOCK A LOCKED PARCEL privilege can unlock a record that is locked through Land Management.

Contacts





Activity records include *contacts*—individuals or businesses associated with the activity. Contact information is specific to a single activity record. The **Contacts** pane shows information for all contacts associated with the activity record. From the **Contacts** pane, you can view related information, open related records, and complete contact-specific actions such as adding or modifying contacts.

Contacts pane

The **Contacts** pane shows:

- Contacts that Community Development added automatically when you added the activity record based on the contact types defined in WUM for the activity record type.
- Additional contacts that a user added to the activity record.

The following icons in the **Contacts** pane indicate additional information is available:

-  indicates an associated Entity Management record. Point to the icon to view the record number. Select the icon to open the Entity Management record.
-  indicates an associated land record. Point to the icon to view the record number. Select the icon to open the land record.
-  indicates an associated license record. Point to the icon to view the record number. Select the icon to open the license record.
-  indicates one or more of the following conditions:
 - The record status is inactive or not valid
 - The contact's license expired
 - The contact's insurance expired

Point to the icon to view the details of the alert.

You can complete the following actions from the **Contacts** pane:

- Add a contact. See [Adding contacts](#).
- Update a blank, default contact type that was added automatically based on WUM settings. See [Modifying contacts](#).
- Modify an existing contact. See [Modifying contacts](#).
- Clear contact information (remove the association to an Entity Management record). See [Clearing a contact](#).
- Duplicate (copy) a contact. See [Duplicating contacts](#) and [Duplicating records](#).
- Update a contact on an activity record when the associated Entity Management record has updated details. See [Update from AEC function](#).

- Print related documents.
- [Send an email](#) to the contact.
- [Sort](#) the contacts listing.

Adding contacts

Use the **Contacts** pane to add a contact to an activity record when the activity record requires more contacts than those that were added automatically based on WUM settings when you added the activity record.

Though you can add additional contact types to an activity record, you can have only one contact per contact type on an activity record. For example, if an activity record already has an **Owner** contact type based on your WUM settings, you cannot add another contact with the contact type of **Owner**.

To add a contact, complete the following steps:

1. Go to the record you want to work with.
2. In the **Contacts** pane, select **Add Contacts**.
3. In the **Contact Type** field, select a type. You must select an option in this field to make the other fields available for entry.
4. To add a new contact, enter the contact's name, select **Create new**, and then go to step 6.


To search for an existing contact, you can:






- Use the **Search** field. Enter the full Entity Management record number or part or all of the contact's name and then select **Go**. The results list appears.
- Use the **Name** field. Enter part or all of the contact's name. A drop-down list shows existing contacts that match the text you entered. Select the contact you want to use. If the name you select matches multiple contacts, the results list appears.

If the contact does not exist, select **Create new**.

Note: You can also search by Entity Management record number in the **Name** field. You must enter the entire record number if you use this method—partial matches will not be found. After you select a contact, the **Name** field always shows the contact name, not the record number.

From the results list, find and select the contact you want to use. The results list includes the following features:

- Arrow  in each contact row: Select the arrow to see more or less detail about the contact.
- **License #** column: Shows the Entity Management record number for an Entity Management record or **N/A** for a standalone contact.

- Icon next to the contact name: Indicates whether the contact is an Entity Management record  or a standalone contact .
 - **Type** column: Shows the contact type from the Entity Management record (for example, architect, electrical engineer, or contractor), or **N/A** for a standalone contact.
 - Multiple ways to select a contact: Select the license number link, icon, or name link to select the contact.
 - Page navigation options: Use these options to move through long lists of results.
 - **Cancel** button: Select **Cancel** to return to the **Add Contacts** dialog box.
5. If you select an Entity Management record that has a status of inactive or not valid, or if the license or insurance of the contact expired, an alert icon  appears. To view details about the alert, point to . To update one of these dates, select , select a date, and then select **OK**.
 6. Complete or update the address, phone, email, and other fields.

Note: If you add an existing entity from Entity Management as a contact for an activity record, the primary license number is used for the license number in the new contact record. If the Entity Management record does not have a license designated as primary, then no license number is added to the new contact record.

7. If you want to add this contact to Entity Management with all the information you entered, select **Add to AEC** and then complete the following steps:
 - a. Select one of the following options from the **Numbering** field:
 - **Automatic:** Select this option if you want Community Development to assign a unique ID number to the Entity Management record. Typically, you select this option for entities that do not have a state license or registration number (for example, architects).
 - **Manual:** Select this option if *you* want to assign the ID number used for this Entity Management record in Community Development. Typically, you select this option for state-registered contractors so that you can use the contractor's license or registration number as the Community Development ID. Enter the license or registration number in the unlabeled field under **Manual AEC Number**.
-
- Tip:** CentralSquare recommends using the contractor's state registration number as the Community Development ID whenever available.
-
- b. Select the contact type.
 - c. Select **OK**.

Note: Contact information is specific to the activity record. Although you can link a contact to an Entity Management record, in order to preserve historical information, contact information on individual activity records is not updated automatically when the associated Entity Management record is updated. You can choose to update individual contacts as needed. For more information about this feature, see [Update from AEC function](#).

8. Select **Save**.
9. If the contact you added is an Entity Management record and you changed the contact details (such as address, phone number, or email address), a prompt appears so you can choose whether you want to update the Entity Management record with the changed details:
 - Select **Yes** to update Entity Management with the changes you made. Community Development updates the Entity Management record, but does not update other activity records associated with the Entity Management record.
 - Select **No** to use the updated details in the current contact only without updating the Entity Management record.

If you change the business license number field for a contact linked to an Entity Management record, and then choose to update the Entity Management record with the contact's information:

- If the license you entered already exists on the Entity Management record, the license number you entered is designated as the primary license.
- If the license does not exist on the Entity Management record, a message appears indicating the license is not on the Entity Management record. Select the link in the message to go to the Entity Management record and add the license. Select **OK** to close the message.

Modifying contacts

Use the **Edit** function to modify an existing contact on an activity record for:




- [Existing contacts](#) with incomplete or incorrect information
- [Blank, default contacts](#) automatically added by Community Development when you added the activity record


Tips:

- To update a contact that is associated with an Entity Management record with changes made in Entity Management, follow the procedure in [Update from AEC function](#).
 - When a contact type changes from one person or business to another, you must clear the contact record using the **Clear** function before using the **Edit** function to update the new contact. For more details, see [Clearing a contact](#).
-

Existing contacts

To update details for an existing contact on an activity record, complete the following steps:

1. Go to the activity record.
2. In the **Contacts** pane, find the contact you want to modify and then select **Edit**.
3. If you select an Entity Management record that has a status of inactive or not valid, or if the license or insurance of the contact expired, an alert icon  appears. To view details about the alert, point to . To update one of these dates, select , select a date, and then select **OK**.
4. Update contact details.

The **Name** field is not available for editing unless you select . This feature helps deter users from changing the current contact to another contact without using the **Clear** function. When a contact type changes from one person or business to another, you must clear the contact record using the **Clear** function before using the **Edit** function to add the new contact details.

If you add an existing entity from Entity Management as a contact for an activity record, the primary license number is used for the license number in the new contact record. If the Entity Management record does not have a license designated as primary, then no license number is added to the new contact record.

5. If the contact is not in Entity Management, you can add this contact to Entity Management. Select **Add to AEC** and then complete the following steps:
 - a. Select one of the following options from the **Numbering** field:
 - **Automatic:** Select this option if you want Community Development to assign a unique ID number to the Entity Management record. Typically, you select this option for entities that do not have a state license or registration number (for example, architects).
 - **Manual:** Select this option if you want to assign the ID number used for this Entity Management record in Community Development. Typically, you select this option for state-registered contractors so that you can use the contractor's license or registration number as the Community Development ID. If you select this option, the **AEC Number** field appears. Enter the license or registration number in the **AEC Number** field.

Tip: CentralSquare recommends using the contractor's state registration number as the Community Development ID whenever available.

- b. Select the contact type.
- c. Select **OK**.

Note: Contact information is specific to the activity record. Although you can link a contact to an Entity Management record, in order to preserve historical information, contact information on individual activity records is not updated automatically when the associated Entity Management record is updated. You can choose to update individual contacts as needed. For more information about this feature, see [Update from AEC function](#).

6. Select **Save**.
7. If the contact you edited is an Entity Management record, a prompt appears so you can choose whether you want to update the Entity Management record with the changed details:
 - Select **Yes** to update Entity Management with the changes you made. Community Development updates the Entity Management record, but does not update other activity records associated with the Entity Management record.
 - Select **No** to use the updated details in the current contact only without updating the Entity Management record.

If you change the business license number field for a contact linked to an Entity Management record, and then choose to update the Entity Management record with the contact's information:

- If the license you entered already exists on the Entity Management record, the license number you entered is designated as the primary license.
- If the license does not exist on the Entity Management record, a message appears indicating the license is not on the Entity Management record. Select the link in the message to go to the Entity Management record and add the license. Select **OK** to close the message.

Blank contacts by contact type

Community Development automatically adds specific contact types when you add activity records. The contact types are assigned in WUM for the activity record type. Complete the following steps to update the blank contact types with contact-specific details:

1. Go to the record you want to work with.
2. In the **Contacts** pane, find the contact you want to modify and then select **Edit**.
3. To add a new contact, enter the contact's name and then go to the next step.

To search for an existing contact, you can:







- Use the **Search** field. Enter the full Entity Management record number or part or all of the contact's name and then select **Go**. The results list appears.

- Use the **Name** field. Enter part or all of the contact's name. A drop-down list shows existing contacts that match the text you entered. Select the contact you want to use. If the name you select matches multiple contacts, the results list appears.

If the contact does not exist, select **Create new**.

Note: You can also search by Entity Management record number in the **Name** field. You must enter the entire record number if you use this method—partial matches will not be found. After you select a contact, the **Name** field always shows the contact name, not the record number.

From the results list, find and select the contact you want to use. The results list includes the following features:

- Arrow  in each contact row: select the arrow to see more or less detail about the contact.
 - **License #** column: shows the Entity Management record number for an Entity Management record or **N/A** for a standalone contact.
 - Icon next to the contact name: indicates whether the contact is an Entity Management record  or a standalone contact .
 - **Type** column: shows the contact type from the Entity Management record (for example, architect, electrical engineer, or contractor), or **N/A** for a standalone contact.
 - Multiple ways to select a contact: select the license number link, icon, or name link to select the contact.
 - Page navigation options: use these options to move through long lists of results.
 - **Cancel** button: select **Cancel** to return to the **Add Contacts** dialog box.
4. If you select an Entity Management record that has a status of inactive or not valid, or if the license or insurance of the contact expired, an alert icon  appears. To view details about the alert, point to . To update one of these dates, select , select a date, and then select **OK**.
 5. Complete the address, phone, email, and other fields.

Note: If you add an existing entity from Entity Management as a contact for an activity record, the primary license number is used for the license number in the new contact record. If the Entity Management record does not have a license designated as primary, then no license number is added to the new contact record.

6. If you want to add this contact to Entity Management with all the information you entered, select **Add to AEC** and then complete the following steps:

-
- a. Select one of the following options from the **Numbering** field:
- **Automatic:** Select this option if you want Community Development to assign a unique ID number to the Entity Management record. Typically, you select this option for entities that do not have a state license or registration number (for example, architects).
 - **Manual:** Select this option if *you* want to assign the ID number used for this Entity Management record in Community Development. Typically, you select this option for state-registered contractors so that you can use the contractor's license or registration number as the Community Development ID. Enter the license or registration number in the unlabeled field under **Manual AEC Number**.

Tip: CentralSquare recommends using the contractor's state registration number as the Community Development ID whenever available.

- b. Select the contact type.
- c. Select **OK**.

Note: Contact information is specific to the activity record. Although you can link a contact to an Entity Management record, in order to preserve historical information, contact information on individual activity records is not updated automatically when the associated Entity Management record is updated. You can choose to update individual contacts as needed. For more information about this feature, see [Update from AEC function](#).

7. Select **Save**.
8. If the contact you added is an Entity Management record and you changed the contact details (such as address, phone number, or email address), a prompt appears so you can choose whether you want to update the Entity Management record with the changed details:
- Select **Yes** to update Entity Management with the changes you made. Community Development updates the Entity Management record, but does not update other activity records associated with the Entity Management record.
 - Select **No** to use the updated details in the current contact only without updating the Entity Management record.

If you change the business license number field for a contact linked to an Entity Management record, and then choose to update the Entity Management record with the contact's information:

- If the license you entered already exists on the Entity Management record, the license number you entered is designated as the primary license.

- If the license does not exist on the Entity Management record, a message appears indicating the license is not on the Entity Management record. Select the link in the message to go to the Entity Management record and add the license. Select **OK** to close the message.

Clearing a contact

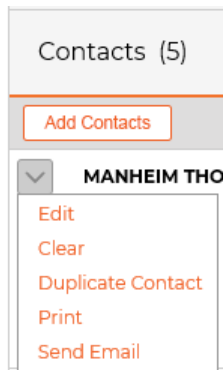
Clearing a contact removes all information from the selected contact record and the association to the Entity Management record. The contact type remains on the record, but all contact details are removed.

Use this function when a contact type changes from one person or business to another. For example, if a contractor changes during a permitting process, clear the previous contractor information and then add the new contractor.

Tip: Do not use the **Edit** function directly to change a contact from one person or business to another. Always use the **Clear** function first, and then edit the contact.

To clear contact information, complete the following steps:

1. Go to the activity record.
2. In the **Contacts** pane, find the record you want to clear.
3. From the functions menu for the contact, select **Clear**.



4. Select **Yes** to confirm the action.

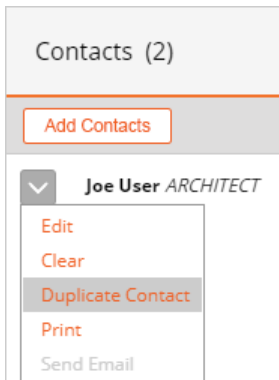
Now you can add information for a different contact to this contact type or associate the contact type with an existing Entity Management record. See [Modifying contacts](#).

Duplicating contacts

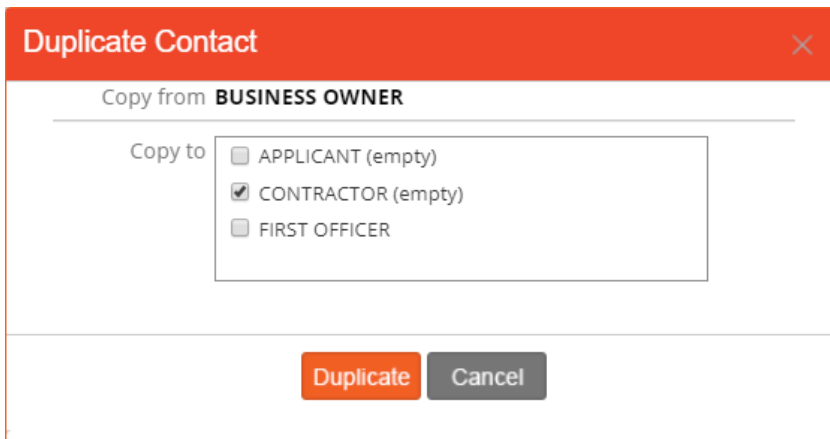
Use the **Duplicate Contact** function to copy information from one contact to one or more contacts on the same permit, project, code case, license, or Entity Management record.

1. Go to the activity or Entity Management record.
2. In the **Contacts** pane, find the record you want to duplicate.

- From the functions menu for the contact, select **Duplicate Contact**.



- Select the contact you want to copy information to.



- Select **Duplicate**.

Update from AEC function

Use this function to update a contact on an activity record when the associated Entity Management record has updated details. This function is available only for contacts that are associated with an Entity Management record.

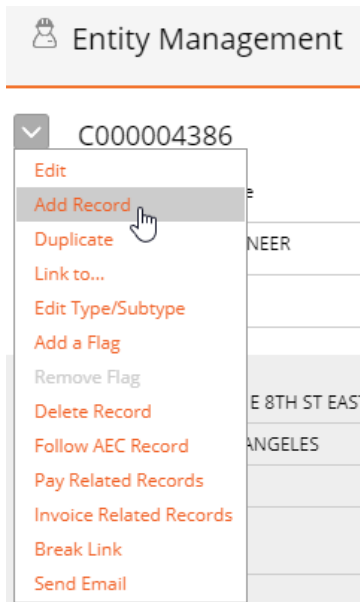
To update a contact, select **Update from AEC** on the functions menu in the **Contacts** pane. Select **Yes** to confirm the update.

Adding Entity Management records

Complete the following steps to add a record in the Entity Management module.

Note: To add a contact from the **Contacts** pane in an activity record, follow the procedure in the [Adding contacts](#) topic.

1. From the functions menu in any Entity Management record, select **Add Record**.



2. Use the default selection in the **Create New** field, which is **New AEC Record**.

Note: The drop-down list includes the following additional options:

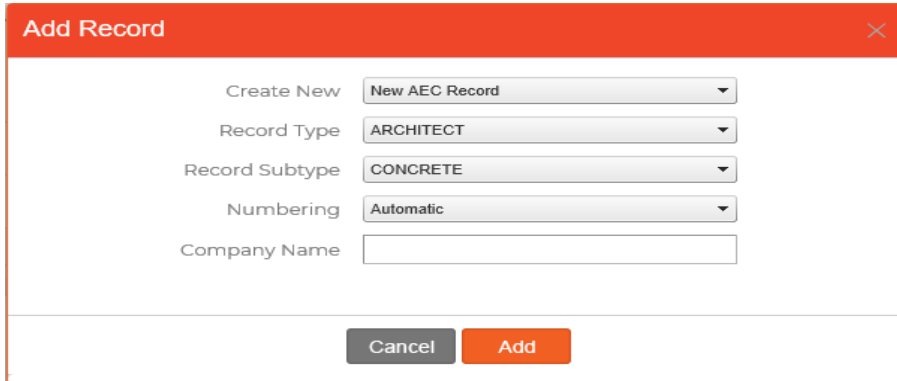
- **Duplicate AEC of this record:** If you want to duplicate (copy) the current Entity Management record, select this option and follow the procedure in [Duplicating records](#).
- **License linked to this record:** If you want to add a linked license record, select this option and follow the procedure in [Adding activity records](#).

3. Select a record type.
4. If applicable, select a record subtype.
5. In the **Numbering** field, select one of the following options:
 - **Automatic:** Select this option if you want Community Development to assign a unique ID number to the Entity Management record. Typically, you select this option for entities that do not have a state license or registration number (for example, architects).
 - **Manual:** Select this option if *you* want to assign the ID number used for this Entity Management record in Community Development. Typically, you select this option for state-registered contractors so that you can use the contractor's license or registration number as the Community Development ID. If you select this option, the **AEC Number** field appears. Enter the license or registration number in the **AEC Number** field.

Tip: CentralSquare recommends using the contractor's state registration number as the AEC number whenever available.

Important: Community Development accepts an asterisk (*) in the AEC license number; however, an asterisk might cause unexpected issues with other systems.

6. Enter a company name.



The "Add Record" dialog box features a red header with a close button. It contains five dropdown menus: "Create New" (set to "New AEC Record"), "Record Type" (set to "ARCHITECT"), "Record Subtype" (set to "CONCRETE"), and "Numbering" (set to "Automatic"). Below these is a text input field for "Company Name". At the bottom are "Cancel" and "Add" buttons.

7. Select **Add**.

Tips:

- After you add the Entity Management record, update information in each pane as needed. For example, to update the address, email address, or website, select **Edit** in the main information pane.
 - Entity Management records contain an IVR (Interactive Voice Response) PIN and a password. The IVR PIN is used as the password for the IVR system. The **Password** field is used to log in to eTRAKiT. When you add or update the IVR PIN, Community Development sets the password to the value entered in the **IVR PIN #** field.
-

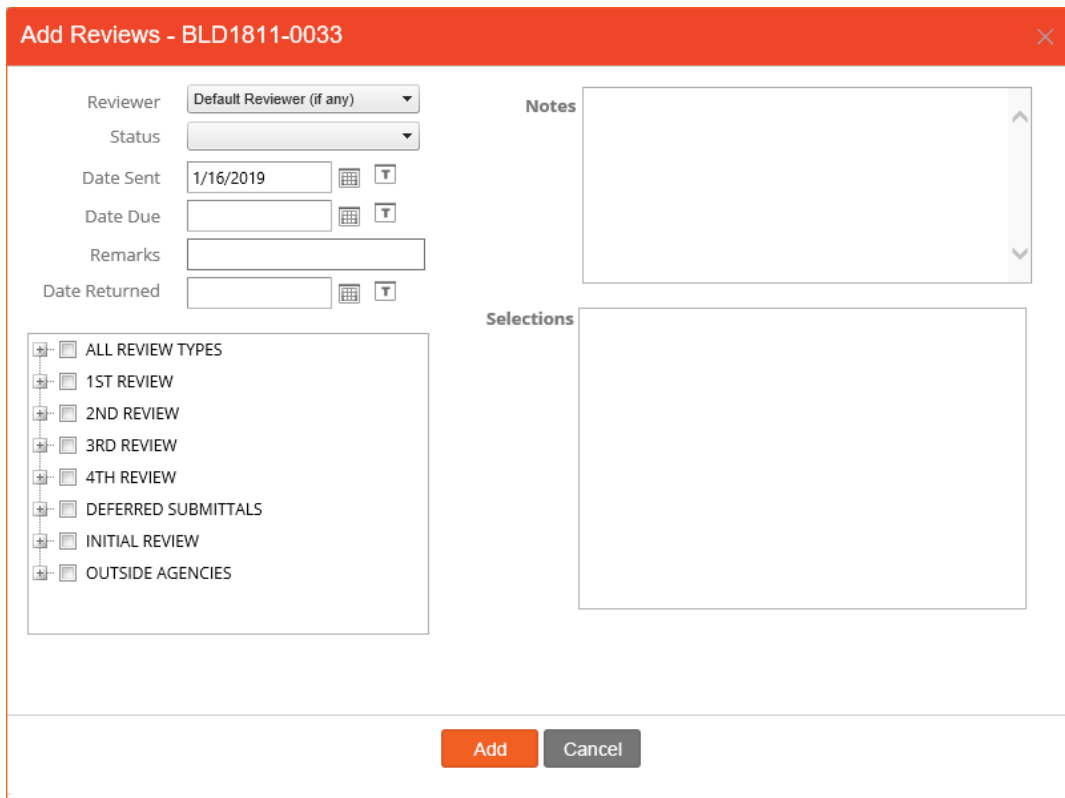
Reviews

Community Development can track reviews associated with records in Permitting, Projects and Planning, and Licensing. You can add, edit, void, and delete reviews. You can also automatically generate emails to reviewers and set up alternate reviewers.

Adding reviews

To add a review to a permit, project, or license record, complete the following steps:

1. In a permit, project, or license record, open the **Reviews** pane.
2. Select **Add Reviews**.



3. Select a reviewer. If you select **Default Reviewer (if any)**, the review is assigned to the reviewer defined in WUM.
4. In the **Status** field, select the status of the review.
5. In the **Date Sent** field, select the date the review items are sent to the reviewer.
6. In the **Date Due** field, select the date the review items are due back.

Tip: Based on options in WUM, the reviewer, date sent, and date due can be set automatically when a review is added to a record.

7. In the **Remarks** field, type remarks related to the review.
8. In the **Date Returned** field, select the date the review was completed, if the review is complete.
9. Select one or more review types. The review types you select appear in the **Selections** box. The reviewer, status, date sent, date due, remarks, date returned, and notes you entered are applied to all reviews you select.
10. In the **Notes** box, type notes related to the review.
11. Select **Add**.

Notes:

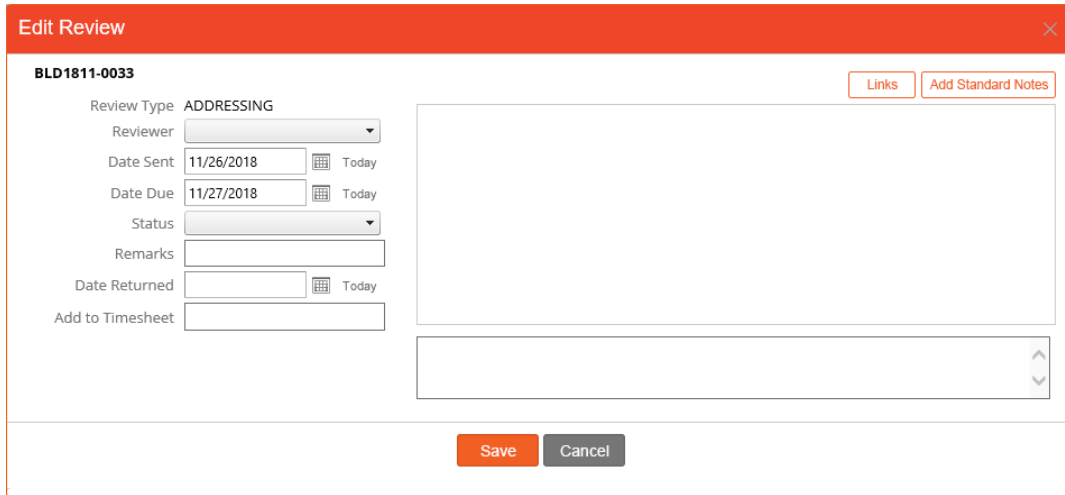
- If you set the **Date Sent**, **Date Due**, or **Date Returned** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.
 - Depending on your WUM settings, an automatic email might be sent to reviewers when a review for a permit or project record is added in Community Development.
-

Editing reviews

You can edit reviews from the record in Permitting, Projects and Planning, and Licensing or from Workspace **Reviews** pane. For more information about using the Workspace **Reviews** pane, see [Reviews](#).

To edit reviews from the permit, project, or license record, complete the following steps:

1. In a permit, project, or license record, open the **Reviews** pane.
2. Select **Edit** next to the review that you want to add information to.



The 'Edit Review' dialog box has a red header bar with the title 'Edit Review' and a close button. Below the header, the review ID 'BLD1811-0033' is displayed. To the right of the ID are two buttons: 'Links' and 'Add Standard Notes'. The main area of the dialog is divided into two columns. The left column contains several form fields: 'Review Type' (a dropdown menu set to 'ADDRESSING'), 'Reviewer' (a text input field), 'Date Sent' (a date picker showing '11/26/2018' with a 'Today' button), 'Date Due' (a date picker showing '11/27/2018' with a 'Today' button), 'Status' (a dropdown menu), 'Remarks' (a text input field), 'Date Returned' (a date picker with a 'Today' button), and 'Add to Timesheet' (a checkbox). The right column is a large text area for additional comments. At the bottom of the dialog are two buttons: 'Save' (in orange) and 'Cancel' (in grey).

3. Update the review with the reviewer, dates, status, remarks, and other details.

Depending on your WUM settings, when you change the **Reviewer** field to add a reviewer or change the reviewer, Community Development might send an email to the new reviewer.

If your system administrator set up standard internet links in WUM, either as global internet links or module-specific links, the **Links** button appears in this dialog box. Select the button to see a list of available links. If you select a link, the website opens in a separate browser tab or window. For more information about internet links, refer to the *Community Development WUM* guide, “Global Internet Links” and “Module-Specific Internet Links.”

4. To add standard notes, select **Add Standard Notes**, select the notes you want to add, and then select **OK**.

You can add standard notes, a custom note, or both. Standard notes are configured by your system administrator.

5. Select **Save**.

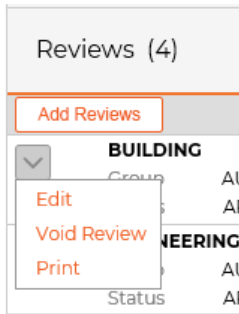
Note: If you set the **Date Sent**, **Date Due**, or **Date Returned** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

Voiding reviews

Users who do not have the CAN DELETE REVIEWS privilege can void reviews but not delete them.

To void a review, complete the following steps:

1. Open the **Reviews** pane.
2. Select **Void Review** from the functions menu.

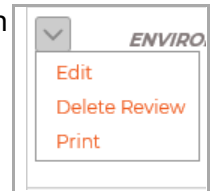


3. Select **Yes**.

Deleting reviews

Only system administrators or users with the CAN DELETE REVIEWS privilege can delete reviews. A review must be voided before it can be deleted.

1. Open the **Reviews** pane.
2. Select **Delete Review** from the functions menu.
3. Select **Yes** to confirm the deletion.



Automating emails by module and review type

Use this feature to automatically generate emails from custom templates both by module and review type. When enabled and set up in Web Utilities & Maintenance (WUM), each review type generates an email to the assigned reviewer when a review is added. For more information about automatic emails for reviews, contact your system administrator or refer to the *Community Development WUM* guide.

Alternate reviewer

Use this feature to assign an alternate reviewer when the default reviewer is out of the office or does not respond to the review in a timely manner. Reviews are assigned to the alternate reviewer under the following conditions:

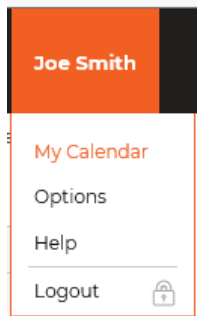
- The default reviewer does not acknowledge the review within two days of assignment
- The default reviewer is unavailable for the entire review period (day the review was assigned through the due date)

Note: If both the default reviewer and alternate reviewer are unavailable, the review is assigned to the alternate reviewer.

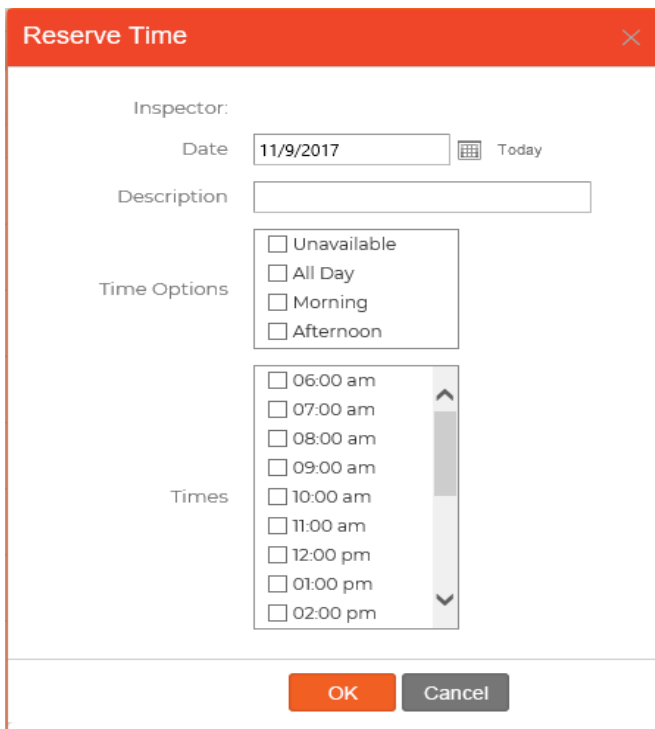
To use this feature, complete the following setup:

1. *System Administrator:* In WUM, set up alternate reviewers for each review type in each module.

2. **Reviewers:** In Community Development, designate time when you are unavailable by completing the following steps:
 - a. Point to the user menu and then select **My Calendar**.



- b. In the **Relationships** pane, select **Reserve Time**.
 - c. Select the out-of-office date and time.



- d. Select **OK**.

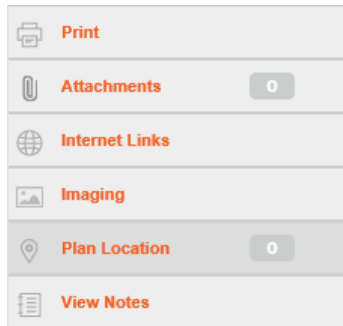
Note: In WUM (for Permitting and Projects and Planning), the **Review Trigger** preference enables the status of projects and permits to be changed automatically when all review statuses are set to a specified status (or list of statuses).

Plan Location

Plan Location manages and tracks the physical location of all plan items that are associated with a record in the Permitting or Projects and Planning module.

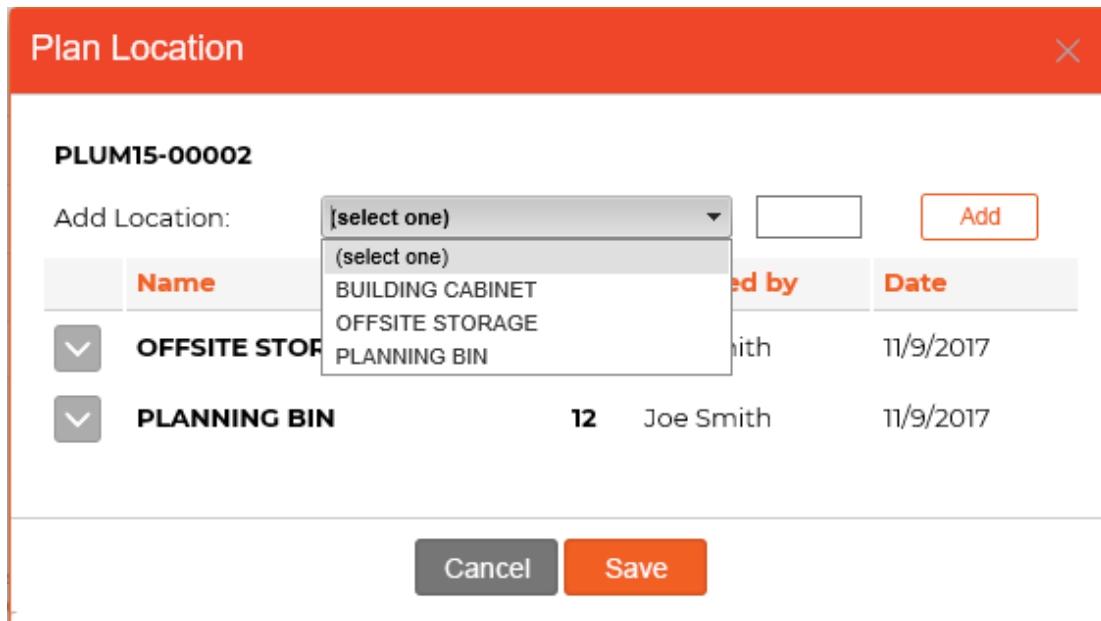
Note: The list of plan locations must be set up by a system administrator before you can use this feature in Community Development.

To access Plan Location, select **Plan Location** in the **Relationships** pane.



From the **Plan Location** dialog box, you can:

- Assign a plan location. First, select the location type. Community Development assigns an available location. Select **Add**.



Plan Location [X]

PLUM15-00002

Add Location: [select one] [] **Add**

	Name		Assigned by	Date
▼	OFFSITE STORAGE	12	Joe Smith	11/9/2017
▼	PLANNING BIN	12	Joe Smith	11/9/2017

Cancel **Save**

- Release a location. Point to the functions menu next to the location you want to release and then

select **Release Location**.

Plan Location

PLUM15-00002

Add Location:

(select one)

Add

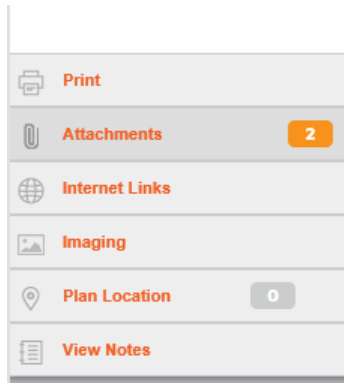
	Name	#	Assigned by	Date
▼	OFFSITE STORAGE	10	Joe Smith	11/9/2017
▼	PLANNING BIN	12	Joe Smith	11/9/2017

Release Location

Attachments

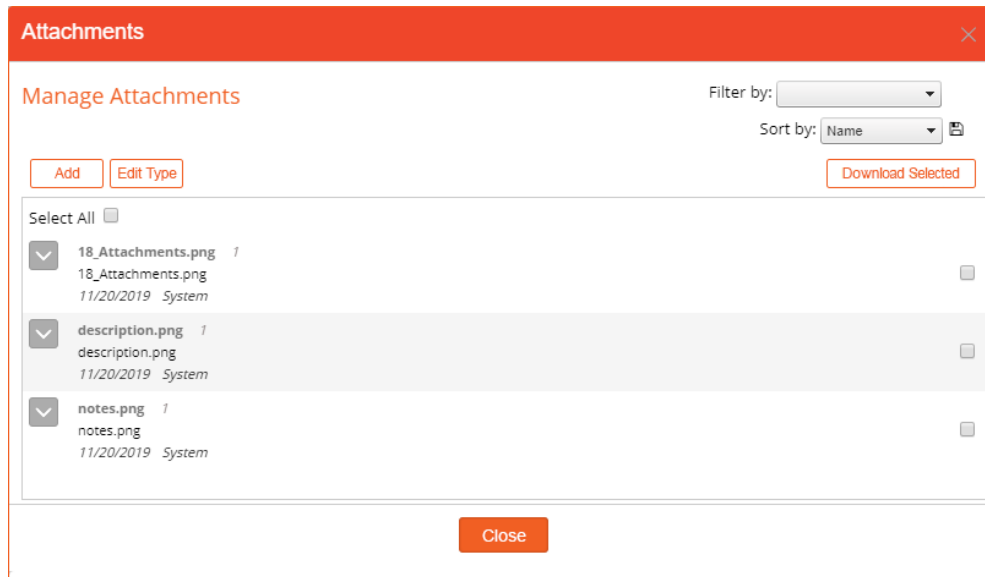
You can attach a file with any file format to a record in Permitting, Projects and Planning, Code Compliance, Licensing, Entity Management, Land Management, or CRM. Attachments are stored on the server.

To manage attachments, go to the record and then, in the **Relationships** pane, select **Attachments**.



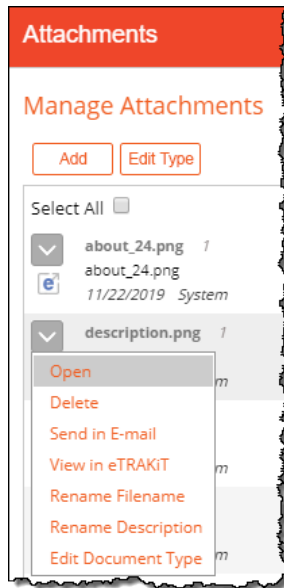
In the **Attachments** dialog box, you can view a list of attachments and perform the following functions using buttons and drop-down lists:

- [Add attachments](#).
- [Filter the attachments list](#).
- [Sort the attachments list](#) and [save a default sort order](#) for the record type.
- [Download attachments](#).
- Set options and perform functions related to your document management system, depending on the system you use and your setup.



Additionally, from the functions menu for each attachment, you can:

- [Open the attachment](#). Attachments open in the default program associated with the file type (for example, PDF files typically open in Acrobat Reader).
- [Delete the attachment](#).
- [Send the attachment in an email](#).
- Make an attachment available or unavailable to [view in eTRAKiT or Citizen Engagement](#).
- [Rename the attachment](#).
- Add, remove, or change the [description of the attachment](#).
- Set options and perform functions related to your document management system, depending on the system you use.



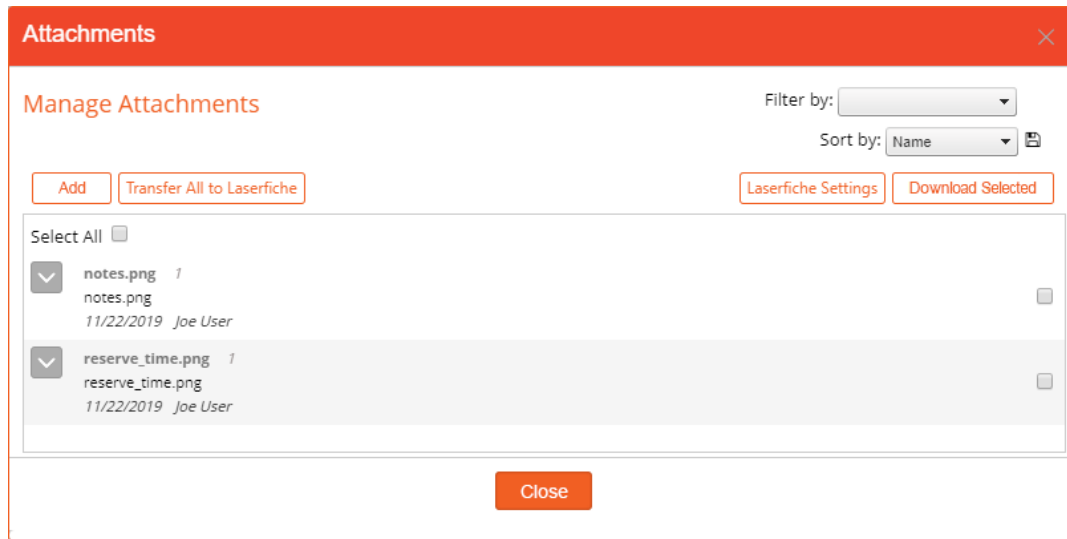
If you use a document imaging system (for example, Laserfiche), additional options might be available.

Attaching files

To attach a file to a Community Development record, complete the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.

Note: Options in this dialog box vary depending on the document management system you use.



3. Select **Add**.
4. Select **Choose Files**.
5. Navigate to the folder where the attachment is located, and then select the file you want to attach. You can select multiple files from the same folder.
6. Select **Open**.

Tip: Attachment file names cannot include the plus sign (+), pound sign (#), percentage sign (%), ampersand (&), or non-ASCII characters. If the file name of an attachment contains any characters that are not allowed, Community Development changes the characters to an underscore (_) when uploading the file.

Attachments that were uploaded in some earlier versions of the application might contain one of these characters. These attachments must be renamed manually to change the character to an underscore or other allowed character. You cannot view or edit these attachments until you rename them.

To rename a file, select **Attachments** in the **Relationships** pane. Point to the functions menu for the file you want to rename and then select **Rename Filename**. Enter the file name changes and then select **Save**.

7. In the unlabeled text field, enter a file description. The file name is the default description.
8. In **Document Type**, select a document type.

Note: This field appears only if your agency enabled the Document Type feature in the `prmry_preferences` table by setting `allow_select_attachment_doctype` to YES. Your agency defines the document types. For more information about the Document Type feature, see [Document Type feature](#).

9. If you want users to be able to view the attachment on your eTRAKiT public website, select the unlabeled check box next to the file name.
10. Select **OK**.
11. Select **Close** to close the **Attachments** dialog box.

Note: The date and the name of the user who attached the document are recorded automatically.

Tip: You can attach some reports and documents when you use the **Print** function to produce those reports and documents. For more information, see [Print documents](#).

Filtering the attachments list

Use the **Filter by** drop-down list to limit the attachments list to the file types you select. You can select more than one option in the drop-down list. The options are:

- **All Image Types:** Only image files appear in the list. Images are files with BMP, GIF, JPG, PNG, TIF, YUV, PSD, PSPIMAGE, or THM file extensions.
- **All Document Types:** Only document files appear in the list. Documents are files with DOC, DOCX, LOG, MSG, PAGES, RTF, TXT, WPD, WPF, PDF, MP3, M4A, TRKM, DWG, or DGN file extensions.
- Files with a specific file extension. This list is record-specific and includes the extensions for all attachments on the record.

Sorting the attachments list

Use the **Sort by** drop-down list to sort the attachments list by one of the following options:

- **Name:** Sort by file name, in alphabetical order from A to Z.
- **Type:** Separate the listing into groups of document files and image/photo files. If you select this option, document files appear first in the listing, followed by image/photo files.

Documents are files with DOC, DOCX, LOG, MSG, PAGES, RTF, TXT, WPD, WPF, PDF, MP3, M4A, TRKM, DWG, or DGN file extensions.

Images are files with BMP, GIF, JPG, PNG, TIF, YUV, PSD, PSPIMAGE, or THM file extensions.
- **Owner:** Sort by the name of the user who uploaded the document, in alphabetical order by first name from A to Z.

- **Date:** Sort by the upload date, with the most recently uploaded at the top of the list.
- **Document Type:** Sort by document type category. Your agency defines these categories. For more information about the Document Type feature, see [Document Type feature](#).

Saving the sort order

You can save a sort order for the list of attachments in the **Attachments** dialog box. The saved sort order is module-specific.

In the **Attachments** dialog box, select an option in the **Sort by** field and then select **Save** .

After you save a sort order, attachments are listed in that order each time you open the **Attachments** dialog box for the same type of activity record. For example, if you view attachments for a permit record and you save **Type** as the sort order, attachments are listed in type order for any permit record you view. You can save a different sort order for each type of activity record.

Note: The **Save** button appears only when the **Sort by** field is different than your saved setting.



Downloading attachments

You can download one or more attachments. To download attachments, complete the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears. An unlabeled check box appears in the row for each attachment.
3. Select the check box for the attachments you want to download. Or, if you want to download all attachments, select the **Select All** check box.

Note: If you filter the attachments list and then select **Select All**, all the attachments that are showing in the list are selected. Attachments that are hidden by the filter are not selected.

4. Select **Download Selected**.
5. Go to the folder where you want to save the files, and then select **Save**. The attachments you selected are downloaded in a ZIP file. The default file name for the ZIP file is based on the

date and time of the download.

6. Select **Close** to close the **Attachments** dialog box.

Opening attachments

You can open images and documents that are attached to a Community Development record.

To open images and documents, complete the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.
3. From the functions menu for the attachment you want to view, select **Open**. The file opens in the default associated application. For example, PDF files generally open in Acrobat Reader.

Deleting attachments

To delete an attachment, complete the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.
3. From the functions menu for the attachment you want to delete, select **Delete**.
4. Select **Yes** to confirm the deletion.
5. Select **Close** to close the **Attachments** dialog box.

Sending an attachment in an email

To send a Community Development attachment in an email, complete the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.
3. From the functions menu for the attachment you want to work with, select **Send in E-mail**.
4. Add the following information:
 - a. In the **To** field, enter the recipient's email address.
 - b. In the **Subject** field, enter a subject or use the default subject.
 - c. In the **Body** field, enter a message or use the default message.
5. Select **Send Email**. A confirmation message appears.
6. Select **Close**.
7. Select **Close** to close the **Attachments** dialog box.

Renaming attachment file names

To change the file name of an attachment, complete the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.
3. From the functions menu for the attachment you want to work with, select **Rename Filename**.
4. Enter the new file name, without the file extension.
5. Select **Save**. The new file name appears in the dialog box.
6. Select **Close** to close the **Attachments** dialog box.

Renaming attachment descriptions


You can add, change, or delete an attachment's description. When you add an attachment, the file name is added as the file description. You can change the description at that point or later.

To manage an attachment's description, complete the following steps:


1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.
3. From the functions menu for the attachment you want to work with, select **Rename Description**.
4. Add, change, or delete the description as needed.
5. Select **Save**. The new file description (or no file description, if you deleted the description) appears in the dialog box.
6. Select **Close** to close the **Attachments** dialog box.

Viewing an attachment in eTRAKiT or Citizen Engagement

You can make attachments available to eTRAKiT or Citizen Engagement users by completing the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.
3. From the functions menu for the attachment you want to work with, select **View in eTRAKiT**. A confirmation message appears.
4. Select **OK**. eTRAKiT or Citizen Engagement users can now view the attachment. In the **Attachments** dialog box in Community Development, the **Viewable in eTRAKiT** icon  appears, indicating this attachment is available in eTRAKiT or Citizen Engagement.


To change an attachment from available to unavailable in eTRAKiT or Citizen Engagement, point to the functions menu and select **Remove from eTRAKiT**. Select **OK** in the confirmation message.

The **Viewable in eTRAKiT** icon  no longer appears in the dialog box and eTRAKiT or Citizen Engagement users cannot access the attachment.

Document Type feature

The Document Type feature helps you categorize attachments attached to activity records. Your agency sets up the document types (categories) and then you assign a document type to attachments when you upload them.

If your agency uses the Document Type feature, complete the following steps to set up the document types:

1. ***This step should be completed by an administrator.*** In the `prmry_preferences` table, set `allow_select_attachment_doctype` to YES. This preference makes the **Document Type** field available in the **Upload Attachments** dialog box, as well as other features for managing and applying document types.
2. Log in to Community Development.
3. Go to any activity record.
4. In the **Relationships** pane, select **Attachments**.
5. Select **Edit Type**.
6. Select **Add** and then update each option in the new row as follows:
 - a. **eTRAKiT**: Select this option to assign this document type when users upload documents through eTRAKiT or Citizen Engagement. You can select this option for one document type only.
 - b. **iTRAKiT**: Select this option to assign this document type when users upload documents through Mobiles. You can select this option for one document type only.
 - c. **Document Type**: Enter the name of the document type.
 - d. **DMS Reference No.**: Enter the document management system reference number.
7. Repeat the previous step to add additional document types.
8. To delete a document type added in error or no longer needed, select  in the row.
9. Select **Save**.

After you set up the document types, you can assign a type to each attachment you upload following the procedure in [Attaching files](#).

To change a document type after you upload the attachment, complete the following steps:

1. Go to the record you want to work with.
2. In the **Relationships** pane, select **Attachments**. The **Attachments** dialog box appears.
3. From the functions menu for the attachment you want to change, select **Edit Document Type**.

4. In the **Change to** field, select the new document type.
5. Select **Save**.
6. Select **Close** to close the **Attachments** dialog box.

Valuations

Community Development can calculate and track the job value for a record in Permitting. Use the **Valuation Details** pane to manage job value details.

The screenshot shows the 'Valuation Details' pane within the 'Permitting' section. The pane has a header with 'Permitting' and 'Permit No: B16-00066'. Below the header, there are tabs for 'Contacts (4)', 'Valuation Details', and 'Job Value: \$350.00'. The 'Valuation Details' tab is active, showing a table with columns: Description, QTY, Units, Unit Cost, and Amount. The table contains one row: 'COST OF IMPROVEMENT' with QTY 1, Units EA, Unit Cost \$0.00, and Amount \$350.00. There are buttons for 'Add Valuations', 'Apply Model Home', 'Add Options', 'Config Model Homes', 'Model Home Calculations', 'Admin Options', and 'Edit All'. The 'Job Value' section at the bottom shows 'Job Value: \$350.00' and an 'Edit All' button.

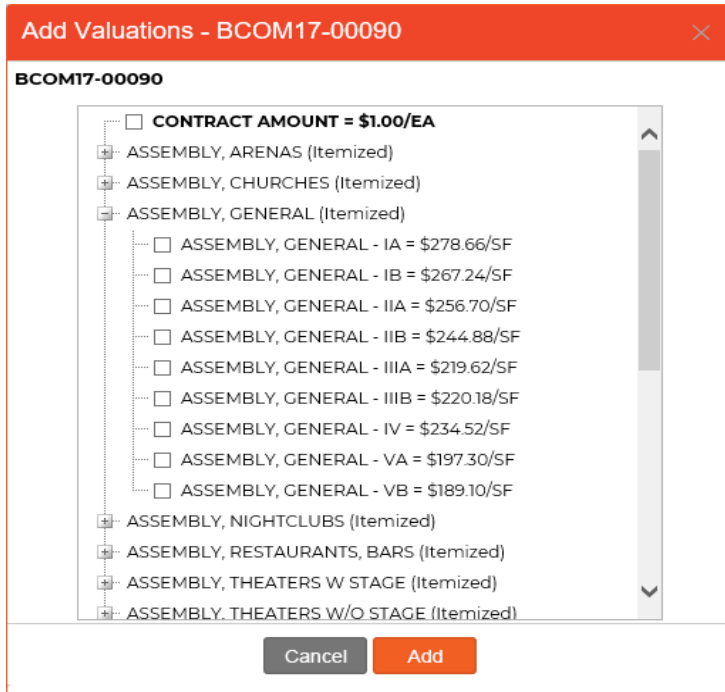
Description	QTY	Units	Unit Cost	Amount
COST OF IMPROVEMENT	1	EA	\$0.00	\$350.00

Job Value: \$350.00

Adding valuations

To add a valuation, complete the following steps:

1. Open the **Valuation Details** pane.
2. Select **Add Valuations**.
3. Select one or more valuation items by which the job value is calculated. To expand a valuation category, select the plus sign (+).



Add Valuations - BCOM17-00090

BCOM17-00090

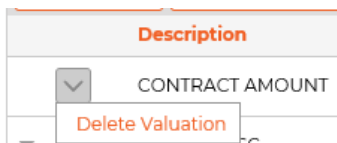
- ☐ **CONTRACT AMOUNT = \$1.00/EA**
 - ☒ ASSEMBLY, ARENAS (Itemized)
 - ☒ ASSEMBLY, CHURCHES (Itemized)
 - ☒ ASSEMBLY, GENERAL (Itemized)
 - ☐ ASSEMBLY, GENERAL - IA = \$278.66/SF
 - ☐ ASSEMBLY, GENERAL - IB = \$267.24/SF
 - ☐ ASSEMBLY, GENERAL - IIA = \$256.70/SF
 - ☐ ASSEMBLY, GENERAL - IIB = \$244.88/SF
 - ☐ ASSEMBLY, GENERAL - IIIA = \$219.62/SF
 - ☐ ASSEMBLY, GENERAL - IIIB = \$220.18/SF
 - ☐ ASSEMBLY, GENERAL - IV = \$234.52/SF
 - ☐ ASSEMBLY, GENERAL - VA = \$197.30/SF
 - ☐ ASSEMBLY, GENERAL - VB = \$189.10/SF
 - ☒ ASSEMBLY, NIGHTCLUBS (Itemized)
 - ☒ ASSEMBLY, RESTAURANTS, BARS (Itemized)
 - ☒ ASSEMBLY, THEATERS W STAGE (Itemized)
 - ☒ ASSEMBLY, THEATERS W/O STAGE (Itemized)

Cancel **Add**

4. Select **Add**.

Deleting valuations

1. Open the **Valuation Details** pane.
2. In the listing, find the valuation or subvaluation item you want to delete.
3. Point to the functions menu and then select **Delete Valuation** or **Delete Sub-Valuation**, depending on the level of the item you are deleting.

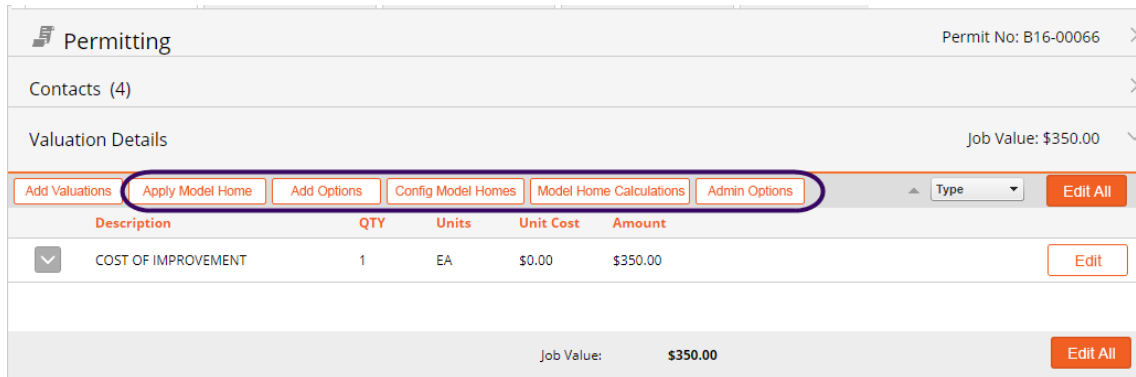


Description
<div> <div>▼</div> <div>CONTRACT AMOUNT</div> </div> <div>Delete Valuation</div>

4. Select **Yes** to confirm the deletion.

Model home templates

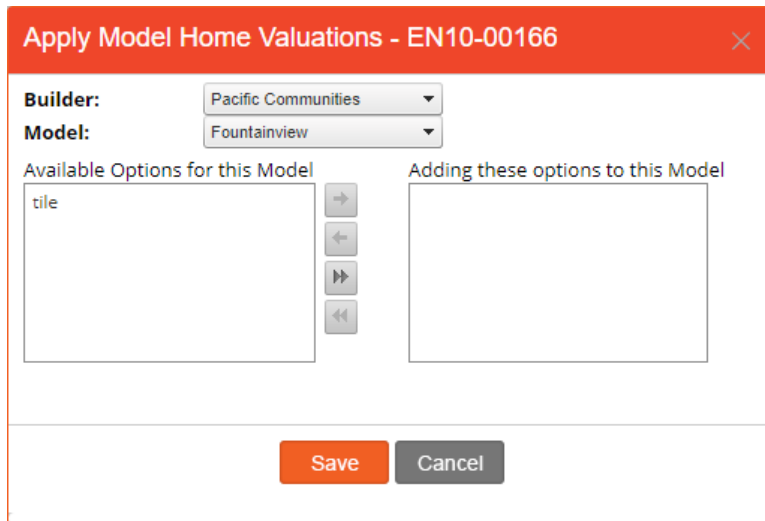
This feature streamlines the workflow for model home permits and projects using model home templates. Templates are configurable according to builders, models, base configuration, and optional valuations.



The screenshot shows the 'Valuation Details' section of a software interface. At the top, there's a 'Permitting' header with 'Permit No: B16-00066'. Below it, 'Contacts (4)' is listed. The 'Valuation Details' section shows 'Job Value: \$350.00'. A row of buttons is visible: 'Add Valuations', 'Apply Model Home' (highlighted with a red circle), 'Add Options', 'Config Model Homes', 'Model Home Calculations', and 'Admin Options'. Below these buttons is a table with columns: 'Description', 'QTY', 'Units', 'Unit Cost', and 'Amount'. The table contains one row: 'COST OF IMPROVEMENT' with a quantity of 1, units of EA, unit cost of \$0.00, and an amount of \$350.00. An 'Edit' button is next to this row. At the bottom, a summary bar shows 'Job Value: \$350.00' and an 'Edit All' button.

Apply Model Home function

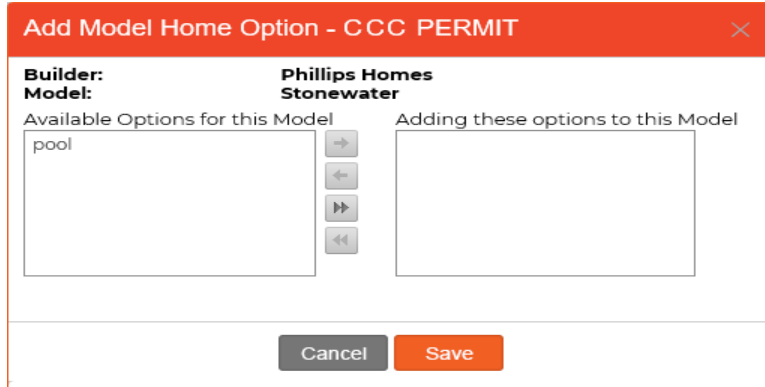
Select **Apply Model Home** on the **Valuations** pane to select the builder and model for the template. If options are known at this point, you can choose the options.



The screenshot shows a dialog box titled 'Apply Model Home Valuations - EN10-00166'. It has a red header bar with a close button. Inside, there are two dropdown menus: 'Builder:' set to 'Pacific Communities' and 'Model:' set to 'Fountainview'. Below these are two text areas: 'Available Options for this Model' containing the word 'tile', and 'Adding these options to this Model' which is empty. Between the text areas are four arrow buttons: a single right arrow, a single left arrow, a double right arrow, and a double left arrow. At the bottom are 'Save' and 'Cancel' buttons.

Add Options function

Select **Add Options** on the **Valuations** pane to select additional options for the template.



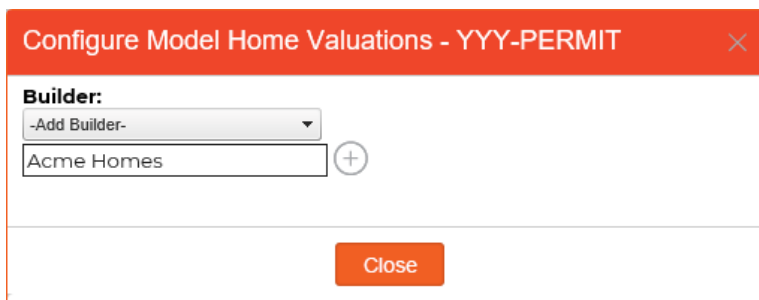
The dialog box is titled "Add Model Home Option - CCC PERMIT". It contains two main sections: "Available Options for this Model" on the left and "Adding these options to this Model" on the right. The "Available Options" list contains the item "pool". Between the two lists are four arrow buttons: a single right arrow, a single left arrow, a double right arrow, and a double left arrow. At the bottom of the dialog are "Cancel" and "Save" buttons.

Configure Model Homes function

Use the **Config Model Homes** button to set up the builders, models, and both the base and options valuations for the model home template.

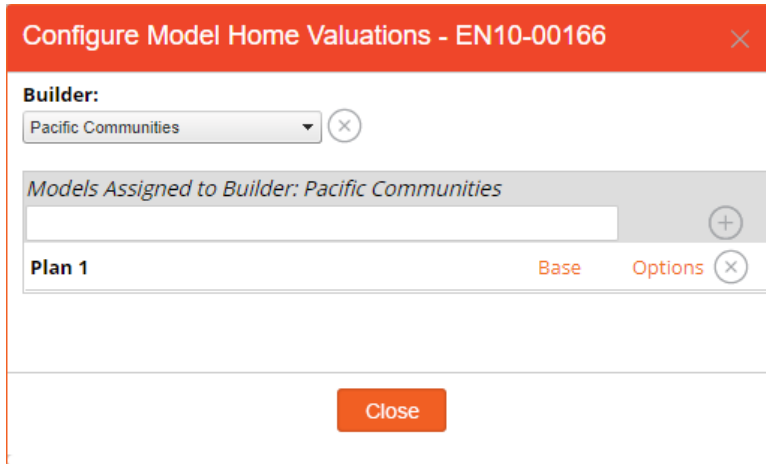
To set up a model homes with base and optional valuations, complete the following steps.

1. Select **Config Model Homes**.
2. Select a builder or add a builder. To add a builder, select **Add Builder**, enter the builder's name, and then select \oplus .



The dialog box is titled "Configure Model Home Valuations - YYY-PERMIT". It features a "Builder:" label above a dropdown menu currently showing "-Add Builder-". Below the dropdown is a text input field containing "Acme Homes" and a plus icon (\oplus) to its right. At the bottom center of the dialog is a "Close" button.

3. If the model is not already set up, set up the model by typing the name of the model and then selecting \oplus .



Configure Model Home Valuations - EN10-00166

Builder:
Pacific Communities

Models Assigned to Builder: Pacific Communities

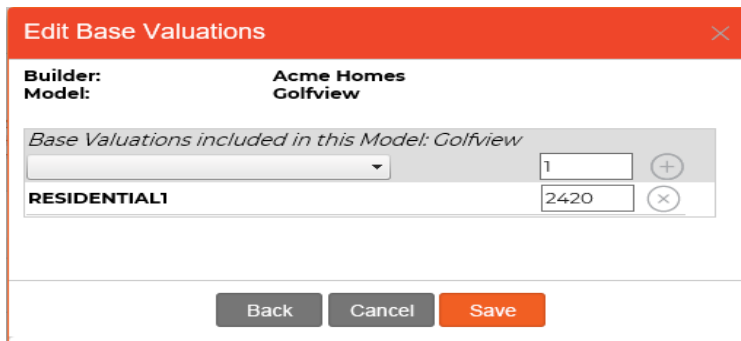
Plan 1 **Base** **Options**

Close

4. Select **Base** next to the model you want to configure.

Note: The **Base** link must be tied to the appropriate valuation(s) for model home templates to function properly.

5. Select from the available choices in the drop-down menu and then select **+**. Enter the applicable square feet in the corresponding field. Select **Save** and then select **Back**.



Edit Base Valuations

Builder: Acme Homes
Model: Golfview

Base Valuations included in this Model: Golfview

RESIDENTIAL1 2420

Back **Cancel** **Save**

Note: The valuation options are set up in the Master Valuation List in Web Utilities & Maintenance (WUM).

6. Select **Options** next to the model you want to configure. Enter an option and then select **+**.

Edit Model Home Template - Golfview

Builder:
Model:

Acme Homes
Golfview

Options included in this Model: Golfview

+

Pool

Options

×

Kitchen-granite countertops

Options

×

Back

Close

7. Edit option valuations by completing these steps:
 - a. Select the **Options** link for an option.
 - b. Select and add each valuation to be included with the option.
 - c. Enter the square feet.
 - d. Repeat for each option.

Note: The **Options** link must be tied to the appropriate valuation(s) for model home templates to function properly.

Edit Option Valuations

Builder:
Model:

Acme Homes
Golfview

Option:

Kitchen-granite countertops

Base Valuations:

Valuation Category	Quantity
RESIDENTIAL1	2420

Option Valuations:

Valuations included in this Option: Kitchen-granite countertops

+

CONTRACT AMOUNT

775

×

Back

Save

Cancel

Model Home Calculations function

Select **Model Home Calculations** to display the total cost of a model home template according to the selected builder, model, and additional options.

View Model Home Calculations - YYY-PERMIT

Builder:
Model:

Acme Homes
Golfview

Valuation	Option	Quantity	Cost	Amount
RESIDENTIAL1	BASE	1	\$12.00	\$12.00
Total:				\$12.00

Cancel

Admin Options function

Select **Admin Options** to select and effectively limit option valuations that are available as choices when configuring model homes.

Admin Options

Available Valuation Components

INITIAL PROJECT COST
ESTIMATE
CUSTOM VALUATION
STANDARD MANHOLE (<10)
(NO DESCRIPTION GIVEN)
REMOVE/ABANDON
MANHOLE
BREAK INTO EXISTING
MANHOLE
CHIMNEY
MTRDSERV ALL WTR SERV5
LESS THN OR 2INCH

→
←
→
←

Included Valuation Components

APPROVED PROJECT COST
ESTIMATE

Save

Cancel

Note: All remaining model home administrator functions, including valuation setup, are included in the *Community Development WUM guide*.

Fees

Fees can be applied to records automatically based on WUM settings or manually in the Community Development **Financial Information** pane. You can also collect payments, print receipts, and perform other cashiering functions from the **Financial Information** pane.

Fees fall into one of the following categories:

- Due amount, either unpaid or paid.
- Credit amount: A *credit* is a negative amount that is applied to a fee through the **Apply Credit** function. For more information about credits, see [Applying a credit](#). Credits appear in red text in the **Financial Information** pane and **Payment** dialog box.
- Record credit amount: A *record credit* is a calculated fee that results in a negative amount, in effect providing a credit on the record. A record credit can be a single fee or the sum of subfees. The record credit can be used to pay other fees. Record credit amounts appear in parentheses () in the **Financial Information** pane and **Payment** dialog box.

Note: In the **Financial Information** pane, the **Paid** and **Due** fields never show a negative amount because credits can only be used to pay fees. Credits cannot be used for a refund.

Financial Information pane

The **Financial Information** pane shows all fees assessed on a record and gives you access to fee functions and payment transactions. *Fees* are amounts charged by your agency, such as permit application fees or inspection fees, as well as deposits, refunds, and discounts. *Payment transactions* track and manage the state of payments and refunds. The **Financial Information** pane shows fees and their related payment transactions for a particular record and provides access to more detailed payment transaction information.

The **Financial Information** pane header shows the following totals:

- **Charged:** Total amount of all fees charged on this record.
- **Paid:** Total amount of fees paid on this record.
- **Due:** Total amount due for all fees on this record.

At the end of the fees listing, the same totals appear, as well as **Deposit Bal**, which is the total balance of deposits on the record.

The **Financial Information** pane includes two tabs: **Fees** and **Transactions**. Use the [Fees tab](#) to work with fees on the record. Use the [Transactions tab](#) to work with payment transactions on the record.

From the **Financial Information** pane, you can:

- [View fees](#) on the record
- Sort and filter the fee listing

-
- [Add fees](#)
 - [Pay fees](#)
 - [Issue refunds](#)
 - [View and print receipts](#)
 - [View and export fee history](#)
 - [View and add deposits](#)
 - [Generate invoices](#)
 - [Delete fees](#)
 - [Apply credits](#)
 - [Access detailed transaction information](#)
 - [Check transaction status](#)

Fees tab


Use the **Fees** tab in the **Financial Information** pane to work with fees on the record.

From the **Financial Information** pane, you can:

- [View fees](#) on the record
- Sort and filter the fee listing
- [Add fees](#)
- [Pay fees](#)
- [Issue refunds](#)
- [View and print receipts](#)
- [View and export fee history](#)
- [View and add deposits](#)
- [Generate invoices](#)
- [Delete fees](#)
- [Apply credits](#)
- [Access detailed transaction information](#)
- [Check transaction status](#)

Each fee is listed in its own row. If a fee has subfees, ▶ appears in the row. Select the row to expand or collapse the subfees list.

The listing shows the following information for each fee:

- Functions menu: Hover over  to see a list of actions you can perform for this fee. Functions that are not available appear in gray text.
- **Description:** Description of the fee and account number this fee posts to. These are defined in WUM.

Select the description link to open **Fee Information**. For more information about the **Fee Information** feature, see [Fee Information](#).

- **Qty:** Quantity used to calculate the fee. If this is blank, quantity is not used to calculate the fee.
- **Amount:** Amount of the fee. If the fee was paid, the word **Paid** appears next to the amount.
- **Comments:** Comments about the fee. If no comments were added, this is blank.
- **Invoice:** Invoice number and date if the fee is included on an invoice.
- **Last Transaction Status:** Status, date, time, and payment method of the transaction.

Select the status link to open **Payment Transaction Detail**. For more information about the **Payment Transaction Detail** feature, see [Payment Transaction Detail window](#).

- **Reference#:** Payment processing system and reference number associated with the fee payment. For payments processed through a third party (such as a credit card processor), the reference number is typically the number assigned by the processor. For payments processed within Community Development, the reference number is typically the receipt number.

Transactions tab

Use the **Transactions** tab in the **Financial Information** pane to work with payment transactions on the record.

Important: Transaction details are available only for transactions created after you install release 19.3 HF07.

The listing shows the following information for each fee:

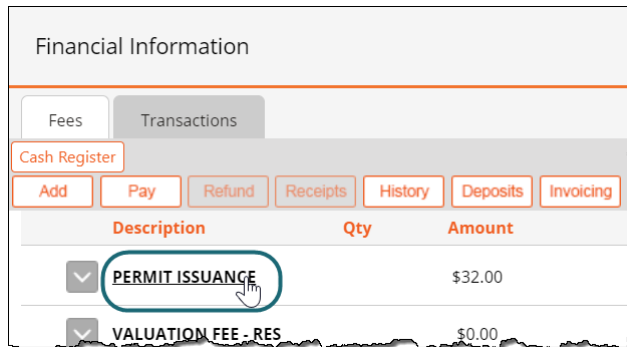
- **Type:** Type of transaction, either **Payment** or **Refund**. Select the type link to open **Payment Transaction Detail**.
- **Last Updated:** Date and time the status of this payment transaction was updated.
- **Cashier:** Community Development user ID of the person who processed the payment. The following system-generated IDs can also appear:
 - **CZP:** Citizen Engagement portal—payment made by a citizen in Citizen Engagement.
 - **EAUS:** eTRAKiT anonymous user—payment made in eTRAKiT by a user who was not logged in.

-
- **ECON:** eTRAKiT registered contractor—payment made in eTRAKiT by a user logged in as a contractor.
 - **EPRS:** eTRAKiT public registered user—payment made in eTRAKiT by a user logged in as a public user.
 - **Amount:** Amount of the payment transaction. This amount can include multiple fees.
 - **Processor:** Payment processing system used for the payment transaction. This can be a third-party processor such as Cardknox or Paymentus, or **Internal** for payments processed by Community Development Cashiering.
 - **Reference Number:** Reference number associated with the fee payment. For payments processed through a third party (such as a credit card processor), the reference number is typically the number assigned by the processor. For payments processed within Community Development, the reference number is typically the receipt number.
 - **Status:** Status of the payment transaction:
 - **Authorized:** The payment processor completed the transaction. Fees, including convenience fees if applicable, are paid.
 - **Posted:** The transaction was authorized and then posted in Community Development. Fees, including convenience fees if applicable, are paid.
 - **AwaitingResponse:** The payment was initiated but the application has not received a response from the payment processor. Fees, including convenience fees if applicable, are unpaid.
 - **TimedOut:** Community Development did not receive a response from the payment processor within the time allotted. Fees, including convenience fees if applicable, are unpaid.
 - **Failed:** The payment was not processed due to bad data, server timeout, or other issue. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Voided:** The transaction was voided in Community Development. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Canceled:** The user canceled the transaction before it was completed or the transaction could not be located by the third party. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Declined:** The payment processor declined (refused to accept) the transaction. Fees are unpaid. Any convenience fees charged with the transaction are deleted.

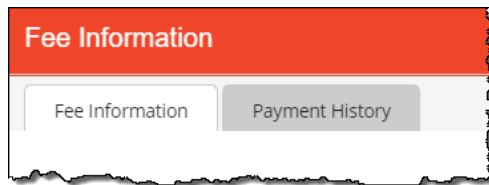
Viewing fee information details

Use the **Fee Information** feature to view more details about a fee, including the fee code, fee formula, and paid-by name.

To open **Fee Information**, go to the record you want to work with and then open the **Financial Information** pane. On the **Fees** tab, select the fee description link.



Fee Information includes two tabs: [Fee Information](#) and [Payment History](#).



Fee Information

The **Fee Information** tab shows the following details:

- **Description:** Description of the fee.
- **Account:** Your agency's internal account number associated with this fee.
- **Fee Type:** Type of fee as defined in WUM, such as **FEE**, **BOND**, or **DEPOSIT**.
- **Fee Assessed By:** Community Development user ID of the person who added the fee. If the fee was added automatically when the record was added in Community Development, this field shows the ID of the person who added the record. The following system-generated IDs can also appear:
 - **CZP:** Citizen Engagement—automatic fee was generated when a user completed an application in Citizen Engagement.
 - **EAUS:** eTRAKiT anonymous user—automatic fee was generated when a user completed an application in eTRAKiT while not logged in.

- **ECON:** eTRAKiT registered contractor—automatic fee was generated when a user completed an application in eTRAKiT while logged in as a contractor.
- **EPRS:** eTRAKiT public registered user—automatic fee was generated when a user completed an application in eTRAKiT while logged in as a public user.
- **Assessed Date:** Date and time the fee was added to the record.
- **Code:** Fee code as defined in WUM.
- **Quantity:** Quantity used to calculate the fee. If this is blank, quantity is not used to calculate the fee.
- **Formula:** Formula used to calculate the fee amount.

Payment History

The **Payment History** tab includes two sections. The upper section of the tab shows the following details:

- **Pay Method:** Payment method, such as **CASH** or **CHECK**.
- **Paid Date:** Date and time the fee was paid.
- **Receipt Number:** Number of the receipt that includes this payment.
- **Paid By:** Name of the person who paid the fee.
- **Reference Number:** Reference number associated with the fee payment. For payments processed through a third party (such as a credit card processor), the reference number is typically the number assigned by the processor. For payments processed within Community Development, the reference number is typically the receipt number.
- **Check:** Check number, if the fee was paid by check. If the fee was paid by a different payment method, this is blank.
- **Cashier:** Community Development user ID of the person who processed the payment. The following system-generated IDs can also appear:
 - **CZP:** Citizen Engagement portal—payment made by a citizen in Citizen Engagement.
 - **EAUS:** eTRAKiT anonymous user—payment made in eTRAKiT by a user who was not logged in.
 - **ECON:** eTRAKiT registered contractor—payment made in eTRAKiT by a user logged in as a contractor.
 - **EPRS:** eTRAKiT public registered user—payment made in eTRAKiT by a user logged in as a public user.

The lower section shows the **Transactions** listing, which includes the following details:

- **Type:** Type of transaction, either **Payment** or **Refund**.
- **Last Updated:** Date and time the transaction status was updated.

-
- **Cashier:** Community Development user ID of the person who processed the payment. The following system-generated IDs can also appear:
 - **CZP:** Citizen Engagement portal—payment made by a citizen in Citizen Engagement.
 - **EAUS:** eTRAKiT anonymous user—payment made in eTRAKiT by a user who was not logged in.
 - **ECON:** eTRAKiT registered contractor—payment made in eTRAKiT by a user logged in as a contractor.
 - **EPRS:** eTRAKiT public registered user—payment made in eTRAKiT by a user logged in as a public user.
 - **Amount:** Amount paid.
 - **Status:** Status of the payment transaction:
 - **Authorized:** The payment processor completed the transaction. Fees, including convenience fees if applicable, are paid.
 - **Posted:** The transaction was authorized and then posted in Community Development. Fees, including convenience fees if applicable, are paid.
 - **AwaitingResponse:** The payment was initiated but the application has not received a response from the payment processor. Fees, including convenience fees if applicable, are unpaid.
 - **TimedOut:** Community Development did not receive a response from the payment processor within the time allotted. Fees, including convenience fees if applicable, are unpaid.
 - **Failed:** The payment was not processed due to bad data, server timeout, or other issue. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Voided:** The transaction was voided in Community Development. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Canceled:** The user canceled the transaction before it was completed or the transaction could not be located by the third party. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Declined:** The payment processor declined (refused to accept) the transaction. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
-

Adding fees

Fees can be applied to records automatically based on WUM settings or manually in the Community Development **Financial Information** pane. For more information about setting up automatic fees or the automatic fees already set up for your agency, contact your system administrator.

To add (assess) fees manually, complete the following steps:

1. Go to the record you want to work with.
2. Open the **Financial Information** pane.
3. Select **Add**.
4. Use the **Expand All** and **Collapse All** buttons to show or hide subfees. You can also expand or collapse the subfee list for a single fee by selecting the plus (+) or minus (–) next to the fee name. By default, subfee lists are hidden or appear based on your agency's selection for the **Expand Fee Schedule tree when Inserting New Fees** check box in **WUM System Settings > Accounting > Fees**.
5. Select one or more fees to assess. If you select a fee, all related subfees are selected. If you clear a fee, all related subfees are cleared. To clear all your selections, select **Uncheck All**.

Tip: In the Licensing module, you can assess a prorated fee (less than 100 percent) or a penalty fee (more than 100 percent). Select the fees to assess, and then select a percentage from the **Pro-Rate/Penalty %** drop-down list.

Add Fees - ROOF1906-00000002

Schedule: 2019Final

Expand All Collapse All Uncheck All

- ☐ BUILDING FEES = [ITEMIZE]
 - ☐ ADDITIONAL PLAN REVIEW = 65*QTY
 - ☐ BASEMENT EGRESS FEE = 100
 - ☐ BUILDING - MISC
 - ☐ BUILDING APPLICATION FEE = 50
 - ☐ BUILDING DEMOLITION = BLDGSF*.25
 - ☐ NUMBER OF WINDOWS = [WINDOWS]
 - ☐ RE-ROOF = (BLDGSF * .25) / (MAX(1,BLDINFO_NO_STO))

Add Cancel

6. Select **Add**.

7. If a fee account number is required, a notification appears. Enter the fee account number, select **Save**, and then select **OK**.
8. Select **Save**.

Paying fees or subfees (over-the-counter transactions)

You can pay fees on multiple records and provide a single receipt using Community Development Cashiering.

Community Development Cashiering

Use one of the following methods to access the Community Development Cashiering feature:

- In the **Financial Information** pane for an activity record, select **Pay**.
- Point to **Favorites** and then select **Cashiering**. To use this access method, you must first add **Cashiering** to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

Note: If the **Lock Fees associated to outstanding transactions** check box in WUM is selected, you cannot process payments on records that have a transaction with a status of **AwaitingResponse** or **TimedOut**. For more details, refer to the *Community Development WUM guide*.

To process a payment for fees, complete the following steps:



1. Open Community Development Cashiering using one of the following methods:
 - In the **Financial Information** pane for an activity record, select **Pay**.
 - Point to **Favorites** and then select **Cashiering**. To use this access method, you must first add **Cashiering** to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).
2. Search for the record that has fees you want to pay. (Skip this step if you are paying fees for only one record and you accessed Cashiering from the **Financial Information** pane for that record.)

If only one record matches your search criteria, the record is automatically added to the dialog box.

If multiple records match your search criteria, a selection list appears. Select the records and then select **Add**.

Payment


Select records to add to the register.

Record #	Total Due	Address	Owner Name
<input type="checkbox"/>  BLD2018-000218	1604.3		
<input type="checkbox"/>  BRES2012-00218	100	238 MARNELL AVE	HEINRICH CAROLYN M/W SS

Add

Cancel

Repeat this step until you have selected all records that are being paid.

3. Remove any fees that will not be paid by this transaction. (This removes the fee from the dialog box, but the fee remains on the record.) To remove fees, select  next to the fee you want to remove. When you remove a fee, Community Development removes related subfees and credits.

Payment

Search Record:

Record #

Contains

218

Load Cart

Record #	Address	Unpaid Total
BLD2018-000218		\$1,614.30
<div>×</div> <div>\$ AFFORDABLE HOUSING LINKAGE</div> <div>100.456.285</div>	\$1,380.00	\$1,380.00
<div>×</div> <div>\$ APPLICATION/PERMIT FEE</div>	\$100.00	\$100.00
<div>×</div> <div>\$ DEPOSIT</div> <div>400.456.412</div>	\$25.00	\$25.00
<div>×</div> <div>\$ BUILDING FEES</div>	\$60.00	
<div>×</div> <div>\$ BUILDING APPLICATION FEE</div> <div>100.485.236</div>	\$50.00	\$50.00
<div>×</div> <div>\$ ARCHIVE FEE</div>	\$49.30	\$49.30
		Total: \$1,614.30
		Fees Selected: \$1,604.30
		Credits Selected: \$0.00
		Total Payment: \$1,604.30

Next

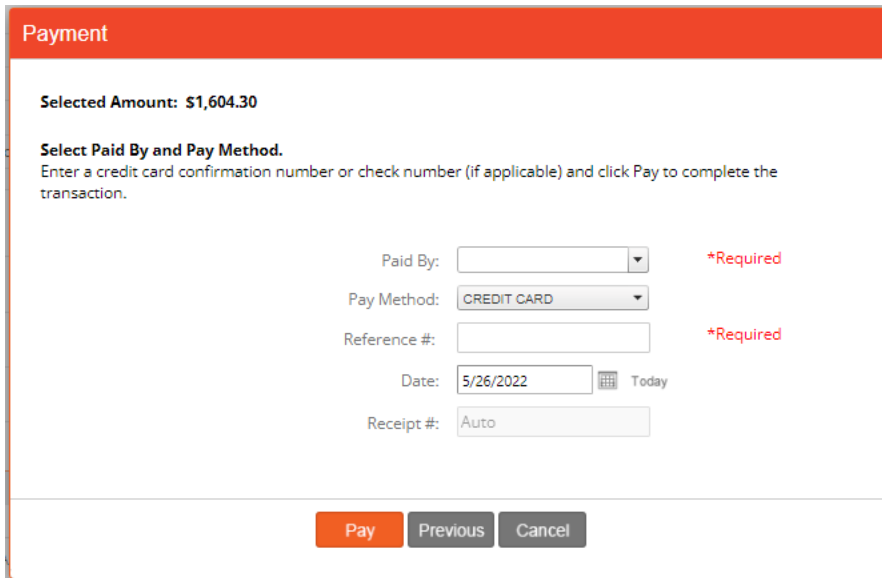
Cancel

- If the payment amount is different from the amount due, enter the payment amount in the **Unpaid Total** box.

Note: If you selected **Pay** from the functions menu, the box is not labeled.

- Select **Next**.
- In the **Paid By** field, enter the name of the person who is paying the fee. *The **Paid By** name is required.* You can select a contact name from the list or enter a name.
- Select an option from the **Pay Method** drop-down list.
 - If you select **Check**, then a check number is required.
 - If you select **Credit Card**, then a credit card authorization number (reference number) is recommended.

- If you select **Cash** and are using TRAKiT Connect and Cash Drawer, see [Using a cash drawer](#).
 - If you select **Deposit**, a list of available deposits appears. By default, all available deposits are selected. Clear the check box for any deposits you do not want to use for this payment. For more details about using deposits to pay fees, see [Using deposits to pay fees](#). For an overview about deposits, see [Deposits](#).
 - If you select **Trust Account**, see [Using a trust account](#).
 - If you select **EMV**, select an option in the **Payment Vendor** field. The **Payment Vendor** field lists all payment processors that are configured in WUM.
8. Add payment-method-specific information, such as check or reference number. Some payment methods do not require additional information.
 9. The **Date** field defaults to the current date. If you want the payment date to be a different date, change the date.



The screenshot shows a 'Payment' dialog box with a red header. Below the header, it displays 'Selected Amount: \$1,604.30'. A section titled 'Select Paid By and Pay Method.' contains instructions: 'Enter a credit card confirmation number or check number (if applicable) and click Pay to complete the transaction.' Below this are several input fields: 'Paid By:' with a dropdown menu, 'Pay Method:' with a dropdown menu set to 'CREDIT CARD', 'Reference #' with a text input field, 'Date:' with a date picker showing '5/26/2022' and a 'Today' button, and 'Receipt #' with a text input field set to 'Auto'. Red asterisks and the word '*Required' are placed next to the 'Paid By:' and 'Reference #' fields. At the bottom of the dialog are three buttons: 'Pay' (orange), 'Previous' (gray), and 'Cancel' (gray).

10. To complete the transaction, select **Pay**. To view the list of fees and make additional changes, select **Previous**. To close the dialog box without saving changes, select **Cancel**.
11. The receipt appears in a new browser tab in PDF format. You can print or save the file. After you complete actions for the receipt, close the browser tab. For more information about receipts, see [Receipts](#).

Using a cash drawer

If an individual pays fees in cash and you use TRAKiT Connect and Cash Drawer, the application performs the following actions after you select **Pay** in the **Payment** window:

Note: TRAKiT Connect must be running before you select **Pay**.

- Checks the status of the cash drawer and attempts to open the cash drawer. A status window appears and displays the status of the cash drawer (for example, the cash drawer is opening).
- Processes and logs the transaction.
- Produces a receipt in PDF format and saves the receipt to the record.

Note: To view the receipt, go to the **Financial Information** pane and select **Receipts**.

Using a trust account

Before you can use a trust account to pay fees, the trust account must have funds and the entity must be associated as a contact on the activity record. For information about setting up trust accounts, see [Trust accounts](#).

To pay fees using a trust account, complete the following steps:

1. Go to the record you want to work with.
2. Ensure that the individual or contractor record from Entity Management is associated in the **Contacts** pane.
3. In the **Financial Information** pane, select **Pay**.
4. Remove fees that will not be paid by this transaction, change payment amounts if needed based on amounts being paid, and then select **Next**.

Note: For more details about removing fees and changing payment amounts, see [Paying fees or subfees \(over-the-counter transactions\)](#).

5. In the **Paid By** field, select the individual or contractor who is paying the fee.

Note: If you do not see the individual or contractor in the **Paid By** drop-down list, then the record is not correctly linked in the **Contacts** pane. Cancel the payment, link the contact in the activity record, and start this procedure again.

6. In the **Pay Method** field, select **Trust Account**. The trust account number appears. Select this link to display the trust account's current balance.

Note: If the **Paid By** name does not have an attached trust account, a warning message appears.

7. The **Date** field defaults to the current date. If you want the payment date to be a different date, change the date.
8. To complete the transaction, select **Pay**. To view the list of fees and make additional changes, select **Previous**. To close the dialog box without saving changes, select **Cancel**.
9. If the payment was successful, a message appears. Select **Close**.

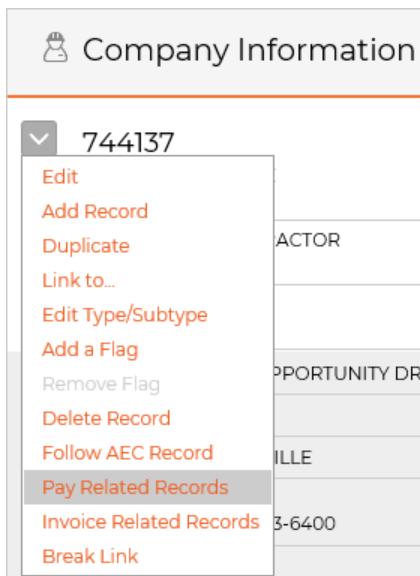
10. The receipt appears in a new browser tab in PDF format. You can print or save the file. After you complete actions for the receipt, close the browser tab. For more information about receipts, see [Receipts](#).

Paying fees from Entity Management

This feature enables you to pay fees for multiple records associated with the entity without having to search for individual records.


To process payments from Entity Management, complete the following steps:

1. In Entity Management, go to the record.
2. From the functions menu, select **Pay Related Records**.



Note: If the record has unused record credits, a dialog box appears. Choose whether you want to use record credits to pay fees. If the amount of record credits equals or exceeds the selected fees, the payment is processed automatically. If the amount of record credits is less than the selected fees, the record credit is added to the list of fees.

Credit Available

 Unused credit(s) are available as a payment option. Would you like to pay with credit(s)?

Note: Subfee credits are automatically applied and cannot be deleted.

3. In the **Payment** dialog box, fees for related records are listed.

Complete the following steps:

- If you want to add fees from additional records, search for the record that has fees you want to pay. Select fees to add.
- Remove fees that are not being paid.

Note: For details about how to search for, add, and remove fees, see [Paying fees or subfees \(over-the-counter transactions\)](#).

- If the payment amount for a fee is different from the amount due, enter the payment amount in the **Unpaid Total** box.
- Select **Next**.
- If the record has unused record credits and the total of fees you selected is less than the record credit, a dialog box appears. Choose whether you want to use record credits to pay fees:
 - If you choose not to use the record credit to pay the fees, return to the **Payment** dialog box and select fees so that the total fees are greater than the record credit.
 - If you choose to use the record credit to pay the fees, Community Development processes the payment automatically and this procedure is complete. Skip the remaining steps.
- Enter payment information.

Note: For details about entering payment information, see [Paying fees or subfees \(over-the-counter transactions\)](#).

- Select **Pay**.

Fee history

To view or export fee history, go to the **Financial Information** pane and then select **History**. The **Fee History** window appears. This window shows a list of fee activities sorted oldest to newest with the following details:

- **User:** ID of the user who performed the action.
- **Date/Time:** Date and time the action was performed.
- **Actions:** Type of action performed, such as **Fee Created**, **Fee Altered**, or **Fee Payment**. For payments and voids, the receipt number and payment method are included.
- **Orig Amt:** Amount of the fee before the action was performed. If **Actions** is **Fee Created**, the original amount is zero.
- **New Amt:** Amount of the fee after the action was performed.
- **Code:** Fee code as defined in WUM.
- **Item:** If this is a subfee, fee code defined in WUM for the subfee. If it is not a subfee, this is blank. **Refund** indicates a refund was processed.

To export the fee history list, complete the following steps:

1. Select **Export List**.
2. Select a file location and enter a file name.
3. Select **Save**. The file is saved in XLS format.

Note: When you open the export file in Microsoft Excel, the following message might appear:

"The file format and extension don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?"

Microsoft Excel displays this message as a security measure against potentially harmful files. Because Community Development is a trusted source, select **Yes** to continue.

Deposits

Contractors and other entities can place deposits on a record to use toward fees on that record. Adding the deposit and paying (collecting) the deposit work much the same way as adding and paying fees. When other fees on the record are paid, deposits are applied according to your Web Utilities & Maintenance (WUM) settings.

Before you use this feature, your system administrator must enable the Deposits feature in WUM, set up fees with a fee type of **DEPOSIT** for each module, and make other fees payable by deposit. For more information about WUM setup for deposits, refer to the *Community Development WUM guide*.

Working with deposits includes the following steps:

1. [Adding deposits to a record](#): Add deposits you want to collect to the record.
2. [Collecting deposit funds](#): Collect payment for deposits following the same process as processing a payment for a fee. The process is described in [Paying fees or subfees \(over-the-counter transactions\)](#).
3. [Using deposits to pay fees](#): Select deposit funds to use to pay other fees. Using deposits to pay fees follows a similar process to processing other payment types.

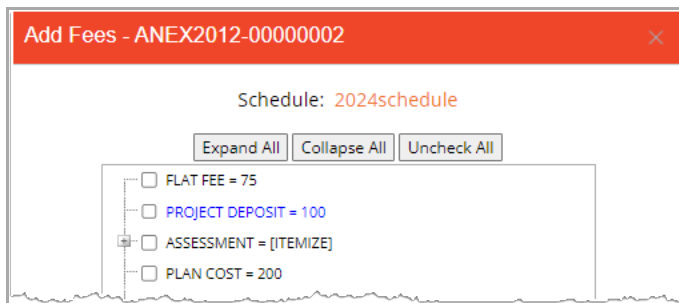
Adding deposits to a record

To add a deposit to a Community Development record, complete the following steps:

Note: Before you use this feature, your system administrator must enable the Deposits feature in WUM, set up fees with a fee type of **DEPOSIT** for each module, and make other fees payable by deposit. For more information about WUM setup for deposits, refer to the *Community Development WUM guide*.

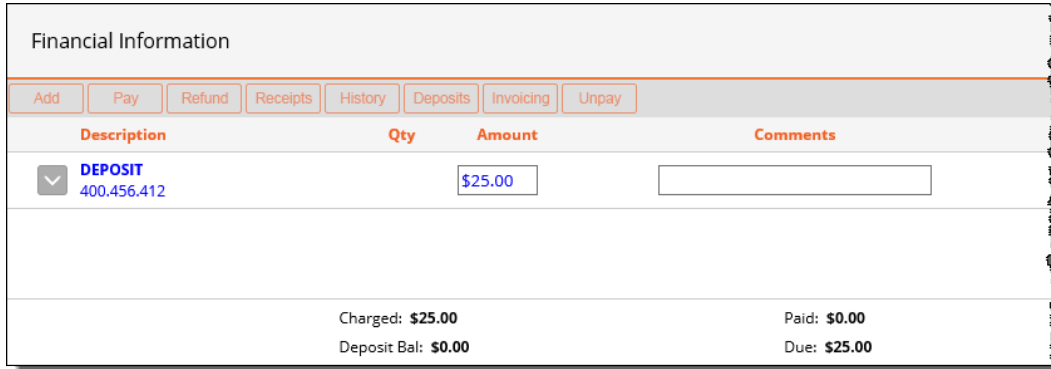
1. Go to the record you want to work with.
2. Open the **Financial Information** pane.
3. Select **Add**.
4. Select one or more deposits to collect.

Tip: Deposits appear in blue text in the list of fees.



5. Select **Add**.
6. Depending on your WUM settings, you might need to enter a fee account number. If the prompt appears, enter the fee account number, select **Save**, and then select **OK**.
7. If a formula was set up in WUM for the deposit type, the deposit amount is calculated automatically. If the deposit is a different amount, you can change it in the **Financial Information** pane under **Amount**.

8. If you want to add a comment, enter the text in the **Financial Information** pane under **Comments**.



The screenshot shows the 'Financial Information' pane with a table of transactions. The table has columns for Description, Qty, Amount, and Comments. A deposit entry is shown with a description of 'DEPOSIT 400.456.412', a quantity of 1, and an amount of \$25.00. Below the table, there is a summary section showing 'Charged: \$25.00', 'Paid: \$0.00', 'Deposit Bal: \$0.00', and 'Due: \$25.00'.

Description	Qty	Amount	Comments
DEPOSIT 400.456.412	1	\$25.00	

Charged: \$25.00 Paid: \$0.00
Deposit Bal: \$0.00 Due: \$25.00

9. In the **Financial Information** pane, select **Save**.

Deposits appear in blue text in the **Financial Information** pane. The balance of unused deposits shows in **Deposit Bal** at the end of the listing.



Collecting deposit funds

Collecting payment for deposits follows the same process as processing a payment for a fee. That process is described in [Paying fees or subfees \(over-the-counter transactions\)](#).

Using deposits to pay fees

If a deposit was collected for a record, the deposit funds can be used to pay other fees on the record.

To use deposit funds to pay a fee, complete the following steps:

1. Go to the record you want to work with.
2. Open the **Financial Information** pane.
3. Select **Pay**. All unpaid fees are listed in the **Payment** dialog box.
4. To add fees from other records, use the **Search Record** fields:
 - a. Select the data to search for, such as **Record #** or **Contact Name**.
 - b. Select an operator. The options are **Begins With**, **Contains**, or **Equals**.
 - c. Enter the search text.
 - d. Select .
 - e. Select the records that have fees you want to include in the transaction.
 - f. Select **Add**.
5. Remove any fees that are not being paid by this transaction. This removes the fee from the dialog box, but the fee remains on the record. To remove fees, select  next to the fee you

want to remove or use the search fields to narrow the list to fees related to a specific record number, address, contact, or reference number. When you remove a fee, Community Development removes related subfees and credits.

6. If the payment amount is different from the amount due, enter the payment amount in the **Unpaid Total** box.
7. Select **Next**.
8. In the **Paid By** field, enter the name of the person who is paying the fee. *The **Paid By** name is required.* You can select a contact name from the drop-down list or enter a name.
9. For **Pay Method**, select **DEPOSIT**.
10. The **Date** field defaults to the current date. If you want the payment date to be a different date, change the date.
11. If your agency requires it, update **Receipt #**.
12. Deposits you can use are listed and selected. Clear the check box for deposits you do not want to use.

Activity Type	Activity	Available Balance
▼ Project	ANX1906-0000	\$155.00
Description	Comments	Balance
<input checked="" type="checkbox"/> TEST DEPOSIT 12345		\$55.00
<input checked="" type="checkbox"/> TEST DEPOSIT 12345JC		\$100.00

13. Select **Pay**.
Funds are applied first from the largest deposit amount to the largest fee and then to the remaining fees you selected in order of largest to smallest. If the largest deposit reaches a \$0 balance and additional fees remain, the next largest deposit is used and applied to the fees in the same order (largest to smallest). This process continues until all fees you selected are paid. If the largest deposit has enough funds to pay all the fees, other deposits are not used.
Deposits can be used to pay fees on the record they are associated with only. For example, deposits on permit ADD-0050 can only be used to pay fees on that permit. You could not use deposits from permit ADD-0050 to pay fees on a project, license, or other permit.
14. The receipt appears in a new browser tab in PDF format. You can print or save the file. After you complete actions for the receipt, close the browser tab. For more information about receipts, see [Receipts](#).

Trust accounts

Trust accounts are an additional payment source that is available for an Entity Management record. The feature enables a company or individual to place on deposit a sum of money that can be used to pay fees in any Community Development module.

Important: Adding funds to a trust account does not generate a payment transaction, which means you cannot track and manage this type of payment in the same way as fee payments and refunds. For more information about payment transactions, see [Payment transactions \(page 165\)](#).

Note: You cannot void trust account payments.

To add funds to a trust account, complete the following steps:

1. Locate the Entity Management record.
2. Expand the **Trust Account** pane.
3. Select **Add Items**.
4. Enter the transaction details:
 - **Paid By:** Enter the name of the company or person who is paying the funds.
 - **Amount:** Enter the amount of the transaction.
 - **Pay Method:** Select the payment method. Additional fields appear depending on the payment method. For example, for payment by check, a check number field appears.

Note: Deposits and payment cards cannot be used as the payment method for adding funds to a trust account.

 - **Date:** Enter the transaction date.
 - **Receipt #:** Enter the receipt number for the transaction from a point-of-sale (POS) system or receipt book.
 - **Description:** Enter a description of the transaction.
5. Select **Add**.

Administrative functions

Certain payment-related functions are typically performed by a manager or administrator at your agency.

Applying a credit

Use the **Apply Credit** function to apply a credit to a fee. A *credit* is a negative amount that is applied to a fee. When the fee is paid, Community Development deducts the credit amount from the fee

amount. A credit appears in red text in the **Financial Information** pane and the **Payment** dialog box.

Note: Credits can be paid in Citizen Engagement or with the **Pay** function in Community Development.

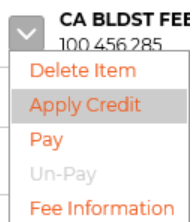
<div> Add Pay Refund Receipts History Deposits Invoicing Unpay </div>			
Description	Qty	Amount	Comments
<div> <div> </div> <div> CERTIFICATE OF OCCUPANCY 4615-100-00000 </div> </div>		\$50.00	
<div> <div> </div> <div> RENEWAL </div> </div>		\$100.00	
<div> <div> </div> <div> RENEWAL 101.654.458 </div> </div>			\$127.39
<div> <div> </div> <div> 11/5/2018: 101.654.458 </div> </div>			\$27.39

Fees with applied credits are processed according to the following rules:

- When you pay the fee, the credit must be used toward the fee payment.
- The credit can be used only on the fee to which it was applied.
- In the **Payment** dialog box, for a fee that has subfees and an applied credit, if you remove subfees and the remaining amount due is less than the credit amount, Community Development removes the credit as well.

To apply a credit to a fee, complete the following steps:

1. Go to the record you want to work with.
2. Open the **Financial Information** pane.
3. From the functions menu, select **Apply Credit**.



4. In the **Fee to Credit** field, select the fee to which you are applying a credit.

Apply Credit
✕

YYY-PERMIT

Total Charged: **\$61.36**

Fee to Credit: CA BLDST FEE ▼

Fee Amount: **\$4.00**

Amount to Credit:

Reason:

Cancel
Apply

5. In the **Amount to Credit** field, enter the credit amount.
6. In the **Reason** field, enter a description of the credit.
7. Select **Apply**. The credit is added as a subfee item and appears in red text.

Overriding a fee

You can change (override) the quantity, fee amount, and comments for a fee that is not paid.

To change fee details, complete the following steps:

1. Go to the record you want to work with.
2. Open the **Financial Information** pane.
3. Select **Edit** in the row for the fee you want to override. Boxes appear for information you can change.

Tip: To override or edit more than one fee, select **Edit All** in the **Financial Information** pane.

If **Edit** does not appear in the row, the fee cannot be changed because it was already paid. If boxes do not appear, that detail cannot be changed. For example, **Qty** might not be required, so a box does not appear. Or, a fee amount might be the sum of subfees, so you must change the subfee amounts instead of the fee amount.

Financial Information

Add Pay Refund Receipts History Deposits Invoicing Unpay

Description	Qty	Amount	Comments	Paid
<input type="checkbox"/> COMPUTER TRACKING FEE 101-261780		\$10.00		09/21/18 CASH
<input type="checkbox"/> ENG. FOLLOW-UP PLAN REV. (add account number)		<input type="text" value="\$300.00"/>	<input type="text"/>	
Charged: \$3,843.00			Paid: \$3,528.00	
Deposit Bal: \$0.00			Due: \$315.00	

- Enter the changes.
- Select **Save**.

Issuing refunds

Use the **Refund** function to return funds to the payer for payments that were already posted. You can refund fees or deposits.

If the **Refund** function is unavailable, the record has no posted fees that can be refunded.

Tip: Refunds are processed as subfees of the fee you are refunding. Refunding a payment generates a new payment transaction that you can void or post. After you void or post a refund, the refund can no longer be updated.

To issue a refund, complete the following steps:

- Go to the record you want to work with.
- Open the **Financial Information** pane.
- Ensure that an account number is assigned to the fee you want to refund. If the fee has an account number, the number appears in the **Financial Information** pane under the fee description. Depending on your setup, account numbers might be assigned automatically or added on the **Fee Information** pane's **Account #** column.
- Select **Refund**.
- If you are refunding subfees, select ▸ next to the parent fee to expand the subfee.
- In the **Refund Amount** column, enter the amount of the refund.
- In **Refund Method**, select the method of refund, such as **CASH** or **CHECK**.
- In **Refund To**, enter the name of the person who will receive the refund. Select a name from the drop-down list or enter a name.
- In **Date**, enter the date to apply to this refund. You can enter the current date or a past date; you cannot enter a future date.

Note: Backdated refunds are excluded from financial exports and must be manually adjusted.

10. In **Reference Number**, enter the reference number associated with the original payment.
11. In **Reason**, enter a reason for the refund.

Refund
✕

Description	Code	Pay Method	Paid Amount	Refund Amount
MECHANICAL PERMITS 101-4220-232100	1030	CCR	10.05	<input style="width: 80px;" type="text" value="10.05"/>

Refund Method: CASH

Refund To: Joe User

Date: 6/20/2023 📅 Today

Reference Number: 123ABC

Reason:

Total: \$10.05

Backdated refunds are excluded from financial exports
and must be manually adjusted.

Refund
Cancel

12. Select **Refund**.

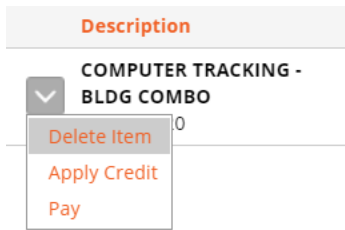
Deleting a fee or subfee

You cannot delete a fee that is paid.

To delete a fee or subfee that is not paid, complete the following steps:

1. Go to the record you want to work with.
2. Open the **Financial Information** pane.
3. Find the fee you want to delete.

4. From the functions menu for the fee or subfee, select **Delete Item**.



5. Select **Yes** to confirm the deletion.

Payment transactions

Paying and refunding fees generates *payment transactions* in Community Development. With payment transactions, you can track and manage the state of payments and refunds. A payment transaction can include a single fee or multiple fees, and fees for a single record or multiple records.

You can view payment transaction information and work with payment transactions from:

- [Payment Transactions window](#), accessed from the **Favorites** menu
- [Payment Transaction Detail window](#), accessed from the **Financial Information** pane or **Payment Transactions** window

Payment Transactions window

Use the **Payment Transactions** feature to view details for payments, [check the status](#) of certain transactions, and to [post](#) transactions.

Tip: To use this feature, you must first add **Payment Transactions** to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

To open the **Payment Transactions** listing, point to **Favorites** and then select **Payment Transactions**.

When you first open the window, transactions processed by you on the current day appear in the listing. To find other transactions, enter filter criteria and then select **Search**. You can enter selections for any of the following criteria:

- **Filter** fields:
 - **Cashier:** Community Development user ID of the person who processed the payment. You can also enter the following system-generated IDs:
 - **CZP:** Citizen Engagement portal—payment made by a citizen in Citizen Engagement.
 - **EAUS:** eTRAKiT anonymous user—payment made in eTRAKiT by a user who was not logged in.

- **ECON:** eTRAKiT registered contractor—payment made in eTRAKiT by a user logged in as a contractor.
- **EPRS:** eTRAKiT public registered user—payment made in eTRAKiT by a user logged in as a public user.
- **Activity Number:** Number of the activity record (for example, project number or permit number).
- **Activity Type:** Type of activity record, such as permit, project, or license.
- **Reference Number:** Reference number associated with the fee payment. For payments processed through a third party (such as a credit card processor), the reference number is typically the number assigned by the processor. For payments processed within Community Development, the reference number is typically the receipt number.
- **Vendor:** Name of the third-party payment processor used for this transaction.
- **Status:** Status of the payment transaction:
 - **Authorized:** The payment processor completed the transaction. Fees, including convenience fees if applicable, are paid.
 - **Posted:** The transaction was authorized and then posted in Community Development. Fees, including convenience fees if applicable, are paid.
 - **AwaitingResponse:** The payment was initiated but the application has not received a response from the payment processor. Fees, including convenience fees if applicable, are unpaid.
 - **TimedOut:** Community Development did not receive a response from the payment processor within the time allotted. Fees, including convenience fees if applicable, are unpaid.
 - **Failed:** The payment was not processed due to bad data, server timeout, or other issue. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Voided:** The transaction was voided in Community Development. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Canceled:** The user canceled the transaction before it was completed or the transaction could not be located by the third party. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Declined:** The payment processor declined (refused to accept) the transaction. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Date Range:** Enter a beginning date and an ending date. If you do not want to use a date range, clear the date fields.

To clear all the criteria, select **Clear Filters**.

The **Payment Transactions** listing shows the following details for each transaction that meets the search criteria:

- **Detail** link: Select this link to open the [Payment Transaction Detail window](#).
- **Last Updated**: Date the transaction status was last updated.
- **Cashier**: Community Development user ID of the person who processed the payment. The following system-generated IDs can also appear:
 - **CZP**: Citizen Engagement portal—payment made by a citizen in Citizen Engagement.
 - **EAUS**: eTRAKiT anonymous user—payment made in eTRAKiT by a user who was not logged in.
 - **ECON**: eTRAKiT registered contractor—payment made in eTRAKiT by a user logged in as a contractor.
 - **EPRS**: eTRAKiT public registered user—payment made in eTRAKiT by a user logged in as a public user.
- **Amount**: Transaction amount.
- **Type**: Type of transaction, either **Payment** or **Refund**.
- **Processor**: Payment processing system used for the payment transaction. This can be a third-party processor such as Cardknox or Paymentus, or **Internal** for payments processed by Community Development Cashiering.
- **Reference Number**: Reference number associated with the fee payment. For payments processed through a third party (such as a credit card processor), the reference number is typically the number assigned by the processor. For payments processed within Community Development, the reference number is typically the receipt number.
- **Status**: Status of the payment transaction:
 - **Authorized**: The payment processor completed the transaction. Fees, including convenience fees if applicable, are paid.
 - **Posted**: The transaction was authorized and then posted in Community Development. Fees, including convenience fees if applicable, are paid.
 - **AwaitingResponse**: The payment was initiated but the application has not received a response from the payment processor. Fees, including convenience fees if applicable, are unpaid.
 - **TimedOut**: Community Development did not receive a response from the payment processor within the time allotted. Fees, including convenience fees if applicable, are unpaid.
 - **Failed**: The payment was not processed due to bad data, server timeout, or other issue. Fees are unpaid. Any convenience fees charged with the transaction are deleted.

- **Voided:** The transaction was voided in Community Development. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Canceled:** The user canceled the transaction before it was completed or the transaction could not be located by the third party. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Declined:** The payment processor declined (refused to accept) the transaction. Fees are unpaid. Any convenience fees charged with the transaction are deleted.

Check Status appears next to third-party processor transactions that do not have a status of **Posted**, if the processor supports this feature. Paymentus and Municipal Services Bureau do not support the Check Status feature.

For more information about checking transaction status, see [Checking transaction status](#).

You can sort the listing by any criteria by selecting the column heading.

To post transactions, select **Post**. For more information about posting transactions, see [Posting transactions](#).

Payment Transactions

Filter:

Cashier

Activity Number

Activity Type

Reference Number

Vendor

Status

Date Range:

6/12/2020

8/13/2020

Clear Filters

Search

Post

	Last Updated	Cashier	Amount	Type	Processor	Reference Number	Status	
Detail	7/2/2020 5:18:26 PM	CZP	210.84	Payment	Cardknox		Canceled	Check Status
Detail	7/2/2020 5:10:24 PM	VH	15	Payment	Internal	R591	Posted	
Detail	7/2/2020 5:10:06 PM	VH	20	Payment	CashReceipts	00000071498	Posted	
Detail	7/2/2020 5:05:47 PM	CZP	10	Payment	Cardknox		Canceled	Check Status
Detail	7/2/2020 5:03:41 PM	ZF	4960.5	Payment	Internal	R592	Authorized	
Detail	7/2/2020 4:38:49 PM	CZP	9	Payment	Cardknox		Canceled	Check Status
Detail	7/2/2020 4:38:37 PM	CZP	10	Payment	Cardknox		Canceled	Check Status
Detail	7/2/2020 4:38:22 PM	CZP	2	Payment	Cardknox		Canceled	Check Status
Detail	7/2/2020 4:32:43 PM	CZP	2.12	Payment	Cardknox		Canceled	Check Status
Detail	7/2/2020 4:23:23 PM	CRW	2.12	Payment	Cardknox		Canceled	Check Status
Detail	7/2/2020 4:10:19 PM	CZP	168	Payment	Paymentus		AwaitingResponse	

1 2 3 4 5 6 7 8 9 10 11 12

Close

Payment Transaction Detail window

Use the **Payment Transaction Detail** window to:

- View transaction detail. For more information, see [Detail tab](#).
- View transaction history. For more information, see [History tab](#).
- Check the status of a transaction. For more information, see [Checking transaction status](#).

- Void a transaction. For more information, see [Voiding payments](#).
- Override transaction status. For more information, see [Overriding transaction status](#).

Access the **Payment Transaction Detail** window using one of the following methods:

- From the **Financial Information** pane:
 - On the **Fees** tab, select the link in the **Last Transaction Status** column.
 - On the **Transactions** tab, select the link in the **Type** column.
- In the **Payment Transactions** window, select the **Detail** link.

Detail tab

The **Payment Transaction Detail** window's **Detail** tab provides information about a specific payment transaction as well as access to [Check Status](#), [Void](#), and [Override Status](#) functions.

Payment Transaction Detail

Detail

History

Id: 84fa2b93-f21d-4081-aa64-1aea11f19973

Created: 6/17/2020 1:05:16 AM

Processor: Internal

Created By: JCM

Reference Number: R498

Paid By: JCM

Status: Authorized

Transaction Type: Payment

Check Status

Void

Override Status

Activity Type	Activity Id	Description	Code	Selected Amount	Pay Method
PERMIT	LS-00000001	COMPUTER TRACKING - ENG 101-261780	COMPTRACK	10	CASH

Close

The upper area of the **Detail** tab shows the following information for the payment transaction:

- **Id**: Internal transaction ID. This ID is used by CentralSquare Support and Development.
- **Created**: Date and time the transaction was created.
- **Processor**: Payment processing system used for the payment transaction. This can be a third-party processor such as Cardknox or Paymentus, or **Internal** for payments processed by Community Development Cashiering.
- **Created By**: Community Development user ID of the person who processed the payment.

- **Reference Number:** Reference number associated with the fee payment. For payments processed through a third party (such as a credit card processor), the reference number is typically the number assigned by the processor. For payments processed within Community Development, the reference number is typically the receipt number.
- **Paid By:** Name of the person who paid the fee.
- **Status:** Status of the payment transaction:
 - **Authorized:** The payment processor completed the transaction. Fees, including convenience fees if applicable, are paid.
 - **Posted:** The transaction was authorized and then posted in Community Development. Fees, including convenience fees if applicable, are paid.
 - **AwaitingResponse:** The payment was initiated but the application has not received a response from the payment processor. Fees, including convenience fees if applicable, are unpaid.
 - **TimedOut:** Community Development did not receive a response from the payment processor within the time allotted. Fees, including convenience fees if applicable, are unpaid.
 - **Failed:** The payment was not processed due to bad data, server timeout, or other issue. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Voided:** The transaction was voided in Community Development. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Canceled:** The user canceled the transaction before it was completed or the transaction could not be located by the third party. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
 - **Declined:** The payment processor declined (refused to accept) the transaction. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Transaction Type:** Type of transaction, either **Payment** or **Refund**.

The listing in the lower area of the tab shows the following details for each fee paid by this transaction:

- **Activity Type:** Type of activity record (for example, permit or project).
- **Activity Id:** Number of the activity record.
- **Description:** Description of the fee and account number this fee posts to. These are defined in WUM.
- **Code:** Fee code as defined in WUM.
- **Selected Amount:** Amount paid for this fee with this transaction.
- **Pay Method:** Payment method, such as **CASH** or **CHECK**.

History tab

The **Payment Transaction Detail** window's **History** tab lists each status change for the payment transaction.

Payment Transaction Detail			
<div> <div>Detail</div> <div>History</div> </div>			
Date	Cashier	Status	Reason
6/17/2020 1:05 AM	JCM	Authorized	Payment succeeded.
6/17/2020 1:05 AM	JCM	AwaitingResponse	Transaction created.
<div>Close</div>			

The listing shows the following details for each status change:

- **Date:** Date and time the status of this payment transaction was updated.
- **Cashier:** Community Development user ID of the person who processed the payment. The following system-generated IDs can also appear:
 - **CZP:** Citizen Engagement portal—payment made by a citizen in Citizen Engagement.
 - **EAUS:** eTRAKiT anonymous user—payment made in eTRAKiT by a user who was not logged in.
 - **ECON:** eTRAKiT registered contractor—payment made in eTRAKiT by a user logged in as a contractor.
 - **EPRS:** eTRAKiT public registered user—payment made in eTRAKiT by a user logged in as a public user.
- **Status:** Status of the payment transaction:
 - **Authorized:** The payment processor completed the transaction. Fees, including convenience fees if applicable, are paid.
 - **Posted:** The transaction was authorized and then posted in Community Development. Fees, including convenience fees if applicable, are paid.
 - **AwaitingResponse:** The payment was initiated but the application has not received a response from the payment processor. Fees, including convenience fees if applicable, are unpaid.
 - **TimedOut:** Community Development did not receive a response from the payment processor within the time allotted. Fees, including convenience fees if applicable, are unpaid.

- **Failed:** The payment was not processed due to bad data, server timeout, or other issue. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Voided:** The transaction was voided in Community Development. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Canceled:** The user canceled the transaction before it was completed or the transaction could not be located by the third party. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Declined:** The payment processor declined (refused to accept) the transaction. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Reason:** Reason for the status change. If the status was changed using the **Override Status** function, **Manual Override** appears before the reason.

Voiding payments

Use the **Void** function to cancel a payment transaction before it is posted.

Tip: Use the **Void** function only if the payment was not received or posted. If the payment was already posted, use the **Refund** function to return funds to the payer.

The process for voiding payments depends on when the fee was paid:

- If the fee was paid in Community Development 19.3 HF06 or earlier, void the individual fee payment. These payments are sometimes called *legacy payments*. For these payments, the **Financial Information** pane's **Last Transaction Status** column says **Transaction Unavailable**. For details about voiding legacy payments, see [Voiding payments](#).
- If the fee was paid in 19.3 HF07 or later, void the payment transaction. For these payments, the **Financial Information** pane's **Last Transaction Status** column shows the transaction's status and includes a link to open the **Payment Transaction Detail** window. For details about voiding payment transactions, see [Voiding transactions](#).

To void any payment or transaction, you must have the CAN VOID TRANSACTION privilege.

Payments into trust accounts cannot be voided.

Voiding payments

Use this procedure to void a fee payment that was processed in 19.3 HF06 or earlier. For these payments, the **Financial Information** pane's **Last Transaction Status** column says **Transaction Unavailable**.

Complete these steps:

1. Go to the record you want to work with.
2. In the **Financial Information** pane, locate the fee.

3. From the functions menu, select **Void Payment**. The **Void Legacy Payment** window appears.
4. Select **OK**.
5. Enter a reason for the void, and then select **OK**. The default reason is **Void Legacy Transaction**, but you can change it.
6. Select **Close**.

The payment is now voided, and details of the void are available as follows:

- In the **Financial Information** pane's **Fees** tab, the **Last Transaction Status** column shows **Payment Voided** along with the date and time the void was processed.
- The **Financial Information** pane's **Transactions** tab shows the void transaction.
- The [Fee History](#) window shows the void transaction.
- The **Payment Transaction Detail** window's **History** tab shows three transactions:
 - A transaction for the original payment. Community Development generates this transaction so that there is a transaction to void. This transaction has a status of **AwaitingResponse**. The **Reason** column shows the date of the original payment.
 - An authorization transaction for the original payment. The authorization transaction finalizes the original payment transaction with a status of **Authorized**. The **Reason** column shows **Legacy Transaction**.
 - The void transaction. This transaction has a status of **Voided**. The **Reason** column shows **Void Legacy Transaction** or the reason you entered when you initiated the void.

Voiding transactions

Use this procedure to void a fee payment that was processed in 19.3 HF07 or later. For these payments, the **Financial Information** pane's **Last Transaction Status** column shows the transaction's status and includes a link to open the **Payment Transaction Detail** window.

Tip: If the payment was already posted, use the **Refund** function to return funds to the payer.

You must void the entire payment transaction. If the transaction includes multiple fees, payments for all the fees are voided.

To void a transaction, you must have the CAN VOID TRANSACTION privilege *for each module involved in the transaction*. For example, if the transaction includes payments on both a permit and a project, you must have the CAN VOID TRANSACTION privilege in both Permitting and Projects and Planning.

To void a transaction, complete these steps:

1. Go to the record you want to work with.
2. In the **Financial Information** pane, locate a fee that is part of the transaction you want to void. Then, select the link in the **Last Transaction Status** column. The **Payment Transaction Detail** window appears.

Tip: You can open the **Payment Transaction Detail** window from multiple UI locations. For details, see [Payment Transaction Detail window](#).

3. Select **Void**. The **Void Confirmation** window appears.
4. If the payment processor is not **Internal**, the **Void Confirmation** window includes a list of **Post void to** locations that can include the payment processor and others. By default, all locations are selected. Clear the check box for any location you do not want to post to. For example, if the payment processor already processed the void, clear the check box for the payment processor.
5. Enter a reason for the void, and then select **Confirm**. A confirmation message appears.
6. Select **Close**.
7. In the **Payment Transaction Detail** window, select **Close**.

Posting transactions

Use the **Post** function to close out your cash drawer at the end of the day or end of a shift. The **Post** function is available in the [Payment Transactions window](#).

The **Post** function processes transactions with a status of **Authorized** that meet the search criteria you entered in the **Payment Transactions** window and that you have access to post. WUM privileges determine whether you can post only transactions you processed, or transactions processed by you or other cashiers. You cannot add or remove transactions before posting.

Post does not post to external (third-party) applications.

The **Post** function updates transactions as follows:

- Changes the transaction status to **Posted**.
- Locks the transaction so that it cannot be changed or voided. Note that users with certain privileges can override the transaction status even when the transaction is locked.
- Updates the last transaction status date and time.
- Prepares the transaction for inclusion in financial exports to external applications, if used by your agency.

To post transactions, complete the following steps:

1. Point to **Favorites** and then select **Payment Transactions**.
To use this feature, you must first add **Payment Transactions** to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).
2. Select **Post**. The **Post Summary** window appears.
3. If you want to enter comments about this batch of transactions, enter the text in **Comment**.
4. Select **Confirm**. A confirmation message appears.
5. Select **Close**.
6. In the **Payment Transactions** window, select **Close**.

Checking transaction status

Use the **Check Status** function to synchronize a transaction with updates from the payment processor. **Check Status** is available only if the payment processor supports this feature, and only for transactions that do not have a status of **Posted**.

Note: Paymentus and Municipal Services Bureau do not support the Check Status feature.

The **Check Status** function is available in the [Payment Transactions window](#) and in the [Payment Transaction Detail window](#).

When you select **Check Status**, Community Development contacts the payment processor for the transaction status. If the processor's status matches the Community Development status, a message appears indicating the status is up to date. If the processor's status is different than the Community Development status, Community Development updates the status to match the processor's status and displays a message indicating the transaction was updated.

Overriding transaction status

Use the **Override Status** function to correct an entry error or to manually synchronize the Community Development transaction status with the payment processor transaction status.

Tip: This function is available only if the **Enable Manual Override** check box is selected in **WUM System Settings > Accounting > Transactions**.

The **Override Status** function is available in the [Payment Transaction Detail window](#).

To override the status of a transaction, complete the following steps:

1. Go to the record you want to work with.
2. In the **Financial Information** pane, locate a fee that is part of the transaction you want to change. Then, select the **Last Transaction Status** link. The **Payment Transaction Detail** window appears.

Tip: You can open the **Payment Transaction Detail** window from multiple UI locations. For details, see [Payment Transaction Detail window](#).

3. Select **Override Status**. The **Status Override** window appears.
4. From the **Update Status To** drop-down list, select the new transaction status.
5. In the **Reason** field, enter the reason for the status change.
6. Select **Confirm**.
7. Select **Close**.
8. In the **Payment Transaction Detail** window, select **Close**.

Receipts

Receipts are automatically produced when you process a payment in Community Development. After you complete the payment, the receipt appears in a new browser tab in PDF format. You can print or save the PDF file using your browser's functions. After you complete actions for the receipt, close the browser tab.

You can also view or print a receipt for a previous payment by completing these steps:

1. Go to the record you want to work with.
2. To print a receipt for a fee or deposit, go to the **Financial Information** pane. To print a receipt for a bond, go to the **Bonds** pane.
3. Select **Receipts**. All receipts associated with the record show in the listing.
4. Select ▸ to expand details for a specific receipt. Select ▾ to collapse details.
5. Select 🖨 next to the receipt you want to print or view. The receipt appears in a new browser tab in PDF format. You can print or save the PDF file. After you complete actions for the receipt, close the browser tab.
6. After you complete all actions with the receipts, select **Close**.

Receipt numbering

Community Development provides two types of cashiering receipts: manual numbering for individual receipts and automatically generated (known as *autogen*) numbering for multiple receipts. Your system administrator sets the type of numbering you use in Web Utilities & Maintenance (WUM).

Individual (manual) receipts

If an autogen name is *not* configured for receipts in Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management, enter the receipt number prefix in the **Receipt #** field when the fee is paid.

Payment

Selected Amount: \$11.00

Select Paid By and Pay Method.

Enter a credit card confirmation number or check number (if applicable) and click Pay to complete the transaction.

Paid By: CentralSquare Technologie

*Required

Pay Method: CREDIT CARD

*Required

Reference #: 012345

*Required

Date: 5/26/2022

Today

Receipt #: RCPT2017

Pay

Previous

Cancel

The receipt name is reflected in the **Receipts** dialog box, which you access from the **Financial Information** pane or **Bonds** pane by selecting **Receipts**.

Receipts

PLUM16-00001

Details of associated fees paid by each receipt

Receipt #	Date	Amount
<div>RCPT2017</div> <div>CHECK, by: Joe Smith</div>	11/17/17	\$25.00

Total Collected: **\$25.00**

Close

Multiple (autogen) receipts

If an autogen name is configured for receipts in Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management, the receipt prefix defaults to the configuration setup for that type of receipt. When multiple receipts from different modules are paid at the same time, the default configuration is the one set up for **Multi_Receipt**.

Payment

Selected Amount: \$1,604.30

Select Paid By and Pay Method.

Enter a credit card confirmation number or check number (if applicable) and click Pay to complete the transaction.

Paid By:

*Required

Pay Method:

CREDIT CARD

Reference #:

*Required

Date:

5/26/2022

Today

Receipt #:

Auto

Pay

Previous

Cancel

Invoicing

Use the Invoicing features to [generate new invoices](#) or to [pay](#), [reprint](#), or [view a summary](#) of existing invoices.

Use one of the following methods to access the Invoicing feature:

- To generate a new invoice:
 - Go to the **Financial Information** pane and then select **Invoicing**.
 - or
 - Point to **Favorites** and then select **Invoice Creation**.

Tip: To use this access method, you must first add **Invoice Creation** to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

- To work with existing invoices, point to **Favorites** and then select **Invoicing**.

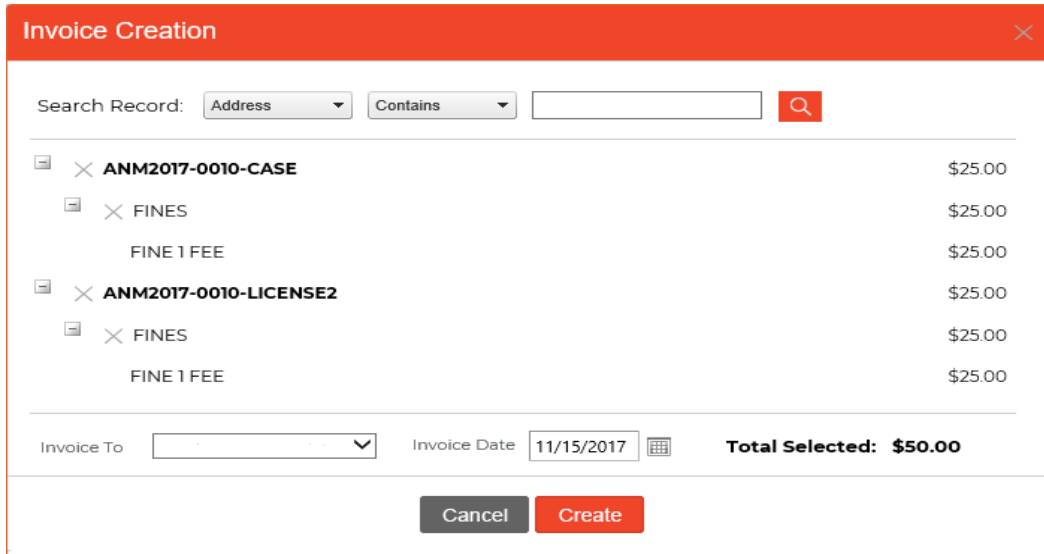
Tip: To use this access method, you must first add **Invoicing** to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

Generating an invoice

To generate an invoice, complete the following steps:

1. Go to the record you want to work with.
2. In the **Financial Information** pane, select **Invoicing**.

Tip: If you added **Invoice Creation** to your **Favorites** list, you can open the **Invoice Creation** dialog box from the **Favorites** menu. When you open the **Invoice Creation** dialog box from the **Favorites** menu, no fees are listed. Search for and select the record you want to work with and then continue to the next step.



- Remove any items you do not want listed on this invoice. To remove items, select **X** next to the item you want to remove or use the search fields to narrow the list to items related to a specific record number, address, contact, or reference number.

Note: This removes the item from the dialog box but the item remains on the record.

- From the **Invoice To** drop-down list, select a contact.
- The invoice date defaults to the current date. If you want a different date on the invoice, enter or select the date.
- Select **Create** to generate the invoice. The invoice appears in a new browser tab in PDF format. You can print or save the PDF file. After you complete actions for the invoice, close the browser tab.

Paying an invoice

Use the Invoicing feature to pay an invoice.

Note: If the **Lock Fees associated to outstanding transactions** check box in WUM is selected, you cannot process payments on records that have a transaction with a status of **AwaitingResponse** or **TimedOut**. For more details, refer to the *Community Development WUM guide*.

To collect payment for an invoice, complete the following steps:

- Point to **Favorites** and then select **Invoicing**.
- Ensure that **Search by unpaid** is selected.
- Search for the invoice by record number or invoice number.

4. Select the invoice you want to pay and then select **Next**.

Invoice Search

Search:

Record #

GO

☒ Search by unpaid
 ☐ Search by paid

<input type="checkbox"/>	Invoice	Date	Address	Contact	Total	Paid Amount	Unpaid Amount
<input checked="" type="checkbox"/>	R-1152	11/15/17	1627 KING ST	Joe Smith	\$25.00	\$0.00	\$25.00

Cancel

Next

5. Select ▸ to expand the list of fees on the invoice. Select ▼ to collapse the list of fees. You can view the fees on the invoice but you cannot add or remove fees.
6. Use options on the functions menu to reprint the invoice or view an invoice summary.

Invoice Details

Selected Invoices

Description

▼

▼

Invoice #R-1152

Reprint Invoice

Invoice Summary

7. Select **Next** to continue to pay the invoice.
8. Complete the payment information:
- In the **Paid By** field, enter the name of the person who is paying the fee. You can select a contact name from the drop-down list or enter a name.
 - In the **Pay Method** drop-down list, select an option.
 - If you select **Cash** and are using TRAKiT Connect and Cash Drawer, see [Using a cash drawer](#).
 - If you select **Check**, then a check number is required.
 - If you select **Credit Card**, then a credit card authorization number (reference number) is recommended.
 - If you select **Deposit**, see [Deposits](#).
 - If you select **Trust Account**, see [Using a trust account](#).

- If you select **EMV**, select an option in the **Payment Vendor** field. The **Payment Vendor** field lists all payment processors that are configured in WUM.
- c. If applicable, enter payment-method-specific information, such as check or reference number.
- d. The payment date defaults to the current date. If you want a different date on the invoice, enter or select the date.
- e. If your agency does not use automatic receipt numbering, enter the receipt number in the **Receipt #** field.

Invoice Details

Amount Due: \$87.75

Select Paid By and Pay Method.
Enter a credit card confirmation number or check number (if applicable) and click Pay to complete the transaction.

Paid By:

Pay Method: CASH

Date: Today

Receipt #:

Pay
Previous
Cancel

9. To complete the transaction and generate an itemized receipt, select **Pay**. To view the list of fees, select **Previous**. To close the dialog box without saving changes, select **Cancel**.

Invoice Sample

 JOE SMITH 1627 KING ST	Pacific Shores XYZ Systems 100 Main St. Pacific Shores, CA 99999	INVOICE # R-1152 Date Due: 12/15/2017
--------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------	------------------------------------------------------------------

Invoice Date: 11/15/2017

Record #	Record Type	Fee Group	Fee Description	Quantity	Amount
ANM2017-0010	ANIMAL		FINE 1 FEE	0	\$25.00
			FINE 1 FEE	0	\$25.00
					\$50.00
Invoice Total: \$50.00					

Please send your payment to this address:

100 Main St.
Pacific Shores, CA 99999

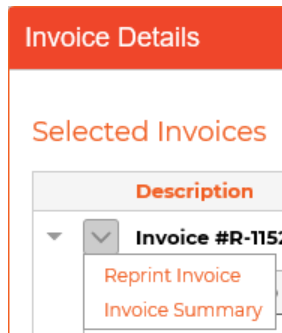
Printed: Wednesday, November 15, 2017 12:41 PM 1 of 1

Note: If only some fees on the invoice are paid and a balance still remains, **Invoice Details** shows the original amount, the outstanding balance in red text, and both the paid date and method in green text next to the paid fees.

Reprinting an invoice

To reprint an invoice, complete the following steps:

1. Point to **Favorites** and then select **Invoicing**.
2. To find an unpaid invoice, select **Search by unpaid**. To find a paid invoice, select **Search by paid**.
3. From the drop-down list, select **Invoice #** or **Record #**. Enter the invoice or record number and then select **GO**.
4. Select the invoice you want to reprint and then select **Next**.
5. Point to the functions menu and then select **Reprint Invoice**.



Community Development generates the invoice and the invoice appears in a new browser tab in PDF format. The word *Reprint* appears in the invoice header. You can print or save the file. After you complete actions for the invoice, close the browser tab.

6. In the Community Development **Invoice Search** dialog box, select **Cancel** to close the dialog box.

Invoice summary

To view a summary of an invoice, complete the following steps:

1. Point to **Favorites** and then select **Invoicing**.
2. To find an unpaid invoice, select **Search by unpaid**. To find a paid invoice, select **Search by paid**.
3. From the drop-down list, select **Invoice #** or **Record #**. Enter the invoice or record number and then select **GO**.
4. Select the invoice you want and then select **Next**.
5. Point to the functions menu and then select **Invoice Summary**. The **Invoice Summary** window appears showing the invoice details. You can view the details but you cannot change them.
6. To close the **Invoice Summary** window, select **Close**.

Invoice Summary

Invoice #R-1131

Payments Applied 10/16/2017 by AS

Amount	Date Paid	Pay Method
\$100.00	10/17/2017	CASH

Total Invoiced: \$135.00

Payments Made: \$100.00

Outstanding Balance: \$35.00

Close

7. In the **Invoice Details** dialog box, select **Cancel**.

Bonds

The **Bonds** pane shows bonds on a permit or project. Use the buttons and functions menus in this pane to:

- [Add](#) a bond
- [Edit](#) a bond
- [Pay](#) a bond
- [Print a receipt](#) for a bond
- [Reduce](#) a bond
- [Release](#) a bond
- [Add or view attachments](#)
- [Print](#) bond-specific documents
- Work with [bond contacts](#)
- [Unpay](#) a bond
- [Delete](#) a bond

The Bonds feature is available in Permitting and Projects and Planning.

Bonds are treated as fees. Before you use this feature, your system administrator must set up fees with a fee type of **BOND**. For more information about WUM setup for bonds, refer to the *Community Development WUM guide*.

Important: Paying or unpaying a bond does not generate a payment transaction, which means you cannot track and manage this type of payment in the same way as other fee payments and refunds. For more information about payment transactions, see [Payment transactions](#).

Bonds (1)			
<div>Add Pay Unpay Receipts</div>			
Description			
▼	\$50,000.00	PROJECTBOND TEST	Original \$0.00 Expires
Charged: \$50,000.00 Active: \$0.00 Due: \$50,000.00			

The **Bonds** pane shows the following details for each bond on the record:

- Bond amount
- Bond description
- **Original:** Original amount of the bond.
- **Expires:** Date the bond expires.

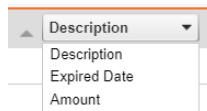
Select ▸ to see the following additional details for the original bond and bond reductions:

- **Applied:** Date the bond was added to the record.
- Bond action: **(ORIGINAL)** or **(REDUCED TO)**.
- **Paid:** Date the bond was paid, receipt number, and payment method.
- **Remarks:** Comments about the bond.
- **Expires:** Date the bond expires.
- **Released:** Date the bond was released.
- Contact type and name: If you added a contact from the **Bonds** pane, the contact type appears followed by the contact name. Select the name link to open the **Contacts** dialog box where you can view or update the contact's information.

If a bond has notes,  appears in the **Bonds** pane. Hover over  to see the note text.

Select ▾ in a row to collapse the bond information.

You can sort the listing by bond description, expiration date, or amount by selecting an option from the drop-down list in the pane header.



The pane footer shows totals of bonds charged, active, and due. Select the **Due** amount link to process a payment.

Adding bonds

To add bonds, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, select **Add**.
3. Select one or more bonds to add to the record. Your selections show on the right side of the window.
4. Select **OK**. The bond appears in the **Bonds** pane with default details that include the bond

description and amount and the expiration date set to the current date.

Add Bonds - 0001

0001 Selections

- ☐ BOND 10000
- ☐ MAINTENANCE BOND 50000
- ☐ PERFORMANCE BOND 15000

OK Cancel

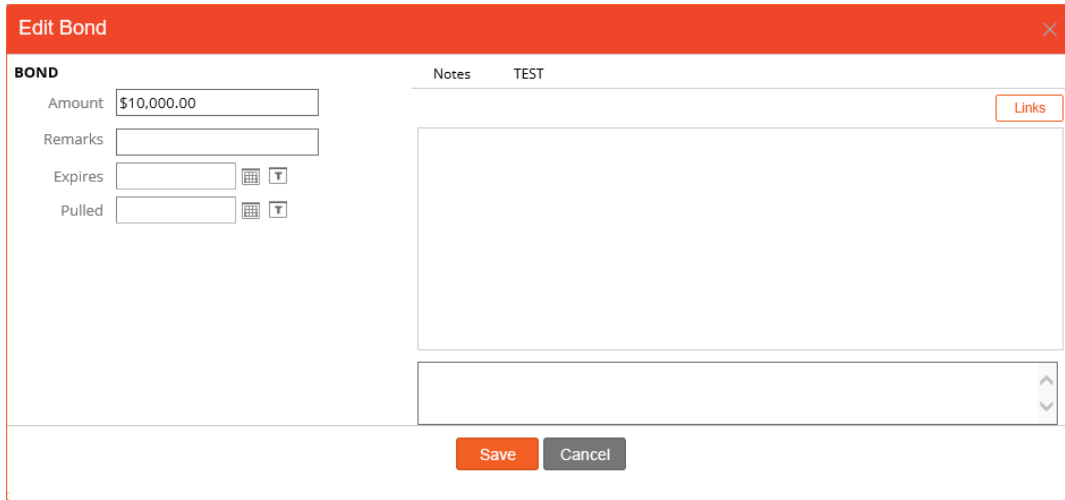
Editing a bond

When you add a bond to a record, only the bond description, amount, and the expiration date (set to the current date) are added. To add or change information about a bond, complete the following steps:

Tip: For a bond that was reduced or released, you can add or edit notes but you cannot change other bond details.

1. Go to the record you want to work with.
2. In the **Bonds** pane, find the bond you want to work with and then select ▾.
3. From the functions menu, select **Edit Bond**, or select the **Edit** button.
4. To change the bond amount, enter the new amount in the **Amount** field.
5. In the **Remarks** field, enter comments.
6. In the **Expires** field, enter the expiration date.
7. In the **Pulled** field, enter the pulled date.
8. Existing notes appear in the upper right area. Enter new notes in the unlabeled field in the lower right area of the window.

Tip: If a bond has notes,  appears in the **Bonds** pane.



9. If your agency set up custom screens for bonds, the screen names appear above the notes. To update custom screen fields, select the screen name and then complete the fields.
10. Select **Save**.

Paying a bond

To process a payment for a bond, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, select **Pay**.
Alternatively, you can select the **Due** link in the pane footer, or select **Pay Bond** from a bond's functions menu. If you use a bond's functions menu, only that bond appears in the **Cashiering** dialog box.
3. Remove bonds that are not being paid by this transaction by selecting **×** next to the bond you want to remove.
4. The payment amount defaults to the due amount. If a different amount is being paid, enter the payment amount.
5. In the **Paid By** field, enter the name of the person who is paying the fee. You can select a contact name from the drop-down list or enter a name.
6. From the **Pay Method** drop-down list, select an option. Available options are defined in WUM **System Settings > Accounting > Bonds**.

Tip: The pay method is sometimes called the secured-by code.

7. Enter payment method-specific information, such as check number or confirmation number. Some payment methods do not require additional information.

8. The **Date** field defaults to the current date. If you want the payment date to be a different date, change the **Date** field.

Cashiering
×

WEB2013-00007
Total Due: **\$50.00**

Description	Amount	Payment
× \$ MAINTENANCE BOND <small>100.516.987</small>	\$50.00	<input style="width: 80px;" type="text" value="\$50.00"/>

Paid By:

Pay Method:

Check #:

Date: Today

Receipt #: **Auto**

Fees Selected: **\$50.00**


Total Payment: **\$50.00**

Cancel
Pay

9. Select **Pay**.
10. The receipt appears in a new browser tab in PDF format. You can print or save the file. After you complete actions for the receipt, close the browser tab. For more information about receipts, see [Receipts for bonds](#).

Receipts for bonds

To view or print a bonds receipt, complete the following steps:

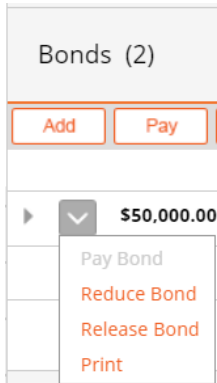
1. Go to the record you want to work with.
2. In the **Bonds** pane, select **Receipts**. All bonds receipts associated with the record appear in the listing.
3. Select ▸ to expand details for a specific receipt. Select ▾ to collapse details.
4. Select  next to the receipt you want to print or view. The receipt appears in a new browser tab in PDF format. You can print or save the PDF file. After you complete actions for the receipt, close the browser tab.
5. After you complete all actions with receipts, select **Close**.

For more information about receipts, see [Receipts](#).

Reducing a bond

To reduce a bond, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, find the bond you want to work with.
3. From the bond's functions menu, select **Reduce Bond**.



4. Enter the new bond amount. The new bond amount must be less than the current bond amount.
5. If you want to reduce the bond using the same payment information used for the original bond, select **Use the same payment information**. Clear this check box if you want to use different payment information.

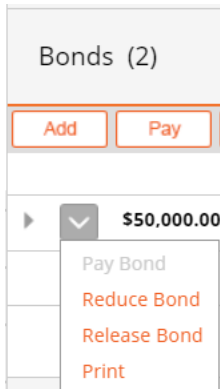
If you want to use different payment information, complete the reduction and then pay the bond using the new payment information. For more information about paying bonds, see [Paying a bond](#).

6. Select **Yes** to confirm the reduction.

Releasing a bond

To release a bond, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, find the bond you want to work with.
3. From the bond's functions menu, select **Release Bond**.



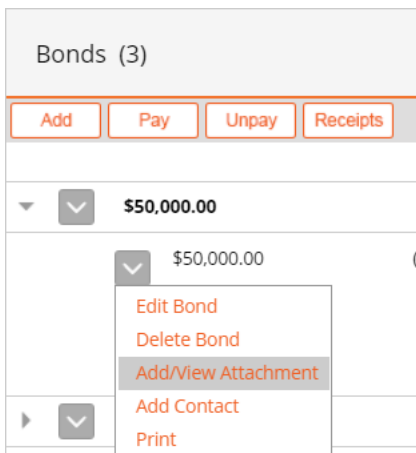
4. Select **Yes** to confirm the release.

Add/View Attachment (from the Bonds pane functions menu)

From the **Bonds** pane, you can add bond-specific attachments and then view, print, download, or email the attachments. These attachments are separate from the attachments accessed in the **Relationships** pane, but the functionality is almost identical.

To work with bond-specific attachments, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, find the bond you want to work with.
3. Expand the bond to show subitems.
4. From the subitem's functions menu, select **Add/View Attachment**.

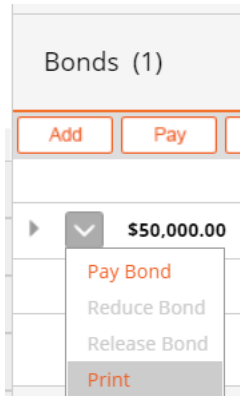


The **Attachments** dialog box appears. This dialog box provides the same functionality described in [Attachments](#), but shows only bond-specific attachments. These bond-specific attachments can be accessed from the **Bonds** pane only.

Printing bond-specific documents

If your agency set up bond-specific documents in WUM **System Settings > Interfaces > Forms and Reports**, you can print the documents from the **Bonds** pane by completing these steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, find the bond. Select the functions menu and then select **Print**.



The **Print Documents** dialog box appears.

3. Select one or more documents.
4. Select the output type.
 - To print the document without previewing it, select **Default Printer 1 or 2**.
 - To preview the document, select **Display**. You can print, save, or modify the document in the application that created it (for example, Microsoft Word).
 - To export the document to PDF format, select **PDF**. The file opens in Acrobat Reader. Be sure to save and rename the file before closing it—the file is not saved automatically.
 - To display the document and attach a copy to the activity record, select **Attach & Display**.
 - To send the document via email as an attachment, select **Email**. You can add comments and recipients before sending the email.
 - To attach a PDF of the document to an email and send it, select **Attach & Email**.

If you selected more than one document in the previous step, the only available options are **Display** and **PDF**.

5. Select **Print**.

If all the parameters for the document you are printing are already defined, the document is produced in the format you selected in the **Output** field.

If the document requires you to define additional parameters, parameter options appear in a new browser tab. Make your selections for each parameter and then select **View Report**.

The document is produced in the format you selected in the **Output** field. Parameters you select are saved until you close the report browser window.

Bond contacts

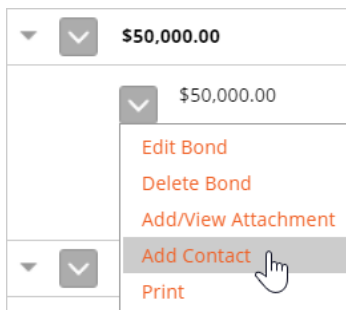
Bond contacts are contact types defined in WUM specifically for bonds. From the **Bonds** pane, you can view the contact name and type and update contact details. Bond contacts also appear in the **Contacts** pane.

To use this feature, bond contacts must be set up in WUM **System Settings > Accounting > Bonds**.

To view details for an existing bond contact, find the bond you want to work with. Select ▾ and then select the name link.

To add a bond contact, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, find the bond you want to work with and then select ▾.
3. From the functions menu, select **Add Contact**.



4. Follow the procedure for adding a contact in [Adding contacts](#), beginning with step 3.

Unpaying a bond

Use the Un-Pay feature to correct a data entry mistake made during the bond collection process. CentralSquare recommends that you use this feature only on the same day as the original transaction.

To unpay a bond, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, select **Unpay**.
3. Select the bond to unpay.

Un-Pay

WEB2013-00007

Select the fees to un-pay by selecting the corresponding checkbox below:

Description	Date Paid	Payment
<input type="checkbox"/> \$ MAINTENANCE BOND 100.516.987	11/17/2017	\$50.00

Total Selected to Un-Pay: **\$0.00**

Cancel

Un-pay

4. Select **Un-pay**.

Deleting a bond

To delete a bond, complete the following steps:

1. Go to the record you want to work with.
2. In the **Bonds** pane, find the bond you want to work with and then select ▾.
3. From the functions menu, select **Delete Bond**.

Bonds (1)

Add

Pay

Unpay

Receipts

▼

▼

\$50.00

▼

\$50.00

Edit Bond

Delete Bond

Add/View Attachment

Add Contact

Print

4. Select **Yes** to confirm the deletion.

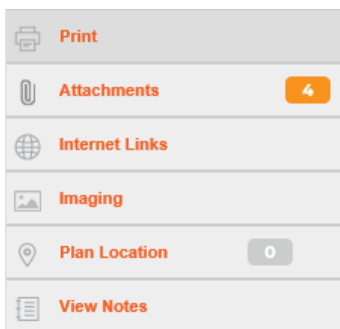
Documents

You can create documents, such as inspection cards, notification letters, and certificates of occupancy, by using the **Print** tool in Permitting, Projects and Planning, Code Compliance, Licensing, or Entity Management. You can also create your own merge documents to use with Community Development. All documents can be printed, sent to contacts via email, displayed, and attached to a record.

Print tool

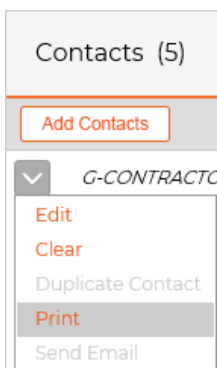
To use the **Print** tool for a record, complete these steps:

1. Go to the record you want to work with.
2. Select **Print** in the tools area.



To print a document at the function level (Chronology, Contacts, Conditions, Inspections, or Reviews), complete the following steps:

1. Go to the record you want to work with.
2. From the functions menu in the pane, select **Print**.



If your agency set up documents for this function, the document list appears.

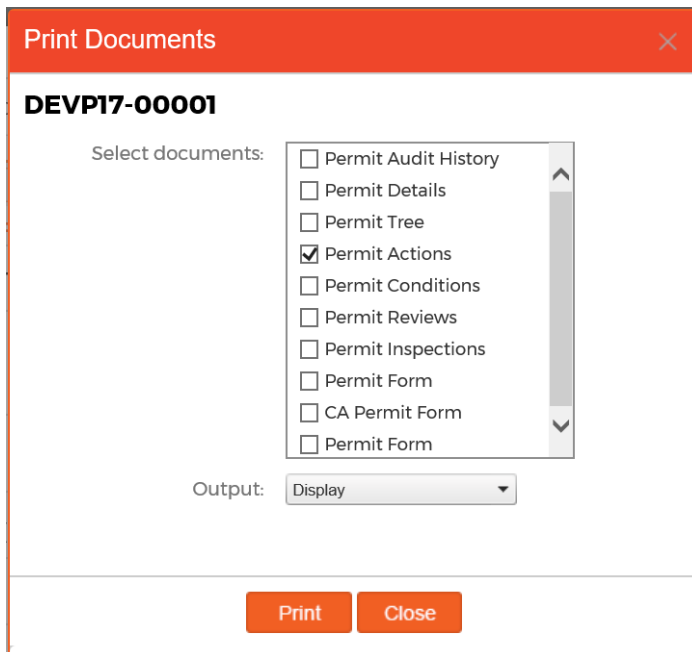
3. Select the documents you want to print.
4. Select the output type:

- **Display:** The document appears as a web page in a separate browser tab. You can scroll through the document, save the document, or print the document.
- **PDF:** The document appears as a PDF in a separate browser tab. You can scroll through the document, download the document, or print the document.
- **Attach:** The document is saved as an attachment on the record and appears in a separate browser tab. You can scroll through the document, save the document, or print the document from the new tab. You can open the attachment any time by selecting **Attachments** in the **Relationships** pane.
- **Email:** The document is saved as a PDF attached to an email form.
 - In **To** field, add recipients. If the record includes contacts with email addresses, you can select the email addresses from a drop-down list. You can also enter email addresses manually in the **To** field. Separate email addresses with a semicolon (;).
 - In the **Subject** field, enter the subject of the email.
 - In the **Body** field, enter a message for the recipients.
 - Select **Send**.

Note: If you select **Email**, you can select only one document.

Print documents

1. In the tools area, select **Print**. The **Print Documents** dialog box appears.

The image shows a 'Print Documents' dialog box with a red header bar containing the title and a close button. Below the header, the record ID 'DEVPI7-00001' is displayed. A section labeled 'Select documents:' contains a list box with the following items: 'Permit Audit History', 'Permit Details', 'Permit Tree', 'Permit Actions' (which is checked), 'Permit Conditions', 'Permit Reviews', 'Permit Inspections', 'Permit Form', 'CA Permit Form', and 'Permit Form'. Below the list box is an 'Output:' label and a dropdown menu currently set to 'Display'. At the bottom of the dialog are two orange buttons: 'Print' and 'Close'.

2. Select one or more documents.

3. Select the output type.

- To print the document without previewing it, select **Default Printer 1 or 2**.
- To preview the document, select **Display**. You can print, save, or modify the document in the application that created it (for example, Microsoft Word).
- To export the document to PDF format, select **PDF**. The file opens in Acrobat Reader. Be sure to save and rename the file before closing it—the file is not saved automatically.
- To display the document and attach a copy to the activity record, select **Attach & Display**.
- To send the document via email as an attachment, select **Email**. You can add comments and recipients before sending the email.
- To attach and email a copy of the document, select **Attach & Email**.

Note: If you selected more than one document in the previous step, the only available options are **Display** and **PDF**.

4. Select **Print**.

If all the parameters for the document you are printing are already defined, the document is produced in the format you selected in the **Output** field.

If the document requires you to define additional parameters, parameter options appear in a new browser tab. Make your selections for each parameter and then select **View Report**. The document is produced in the format you selected in the **Output** field. Parameters you select are saved until you close the report browser window.

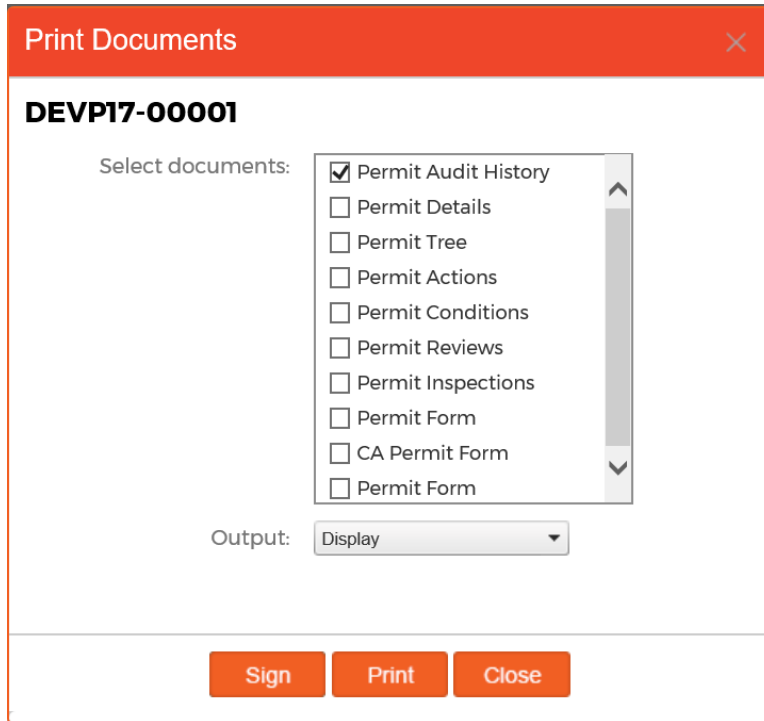
Note: Some documents might require a signature before they can be printed. For more information, see [Using a signature pad](#).

Using a signature pad

Some documents require a signature before they can be printed.

Note: Contact your system administrator for more information about which documents are configured to require a signature.

If you use a signature pad and TRAKiT Connect, the **Sign** button appears in the **Print Documents** dialog box when you select a document that requires a signature.



Print Documents [X]

DEVPI7-00001

Select documents:

- ☒ Permit Audit History
- ☐ Permit Details
- ☐ Permit Tree
- ☐ Permit Actions
- ☐ Permit Conditions
- ☐ Permit Reviews
- ☐ Permit Inspections
- ☐ Permit Form
- ☐ CA Permit Form
- ☐ Permit Form

Output: Display

Sign Print Close

You must complete the following steps to be able to print the document:

1. Ensure TRAKiT Connect is running. If TRAKiT Connect is not running, start it.
2. In the **Print Documents** dialog box, select the document and the output type.
3. Select **Sign**. TRAKiT Connect runs and a pop-up window appears.

Note: Your browser must be set to enable pop-up windows for the Community Development website. Contact your IT department if you need help enabling this setting.



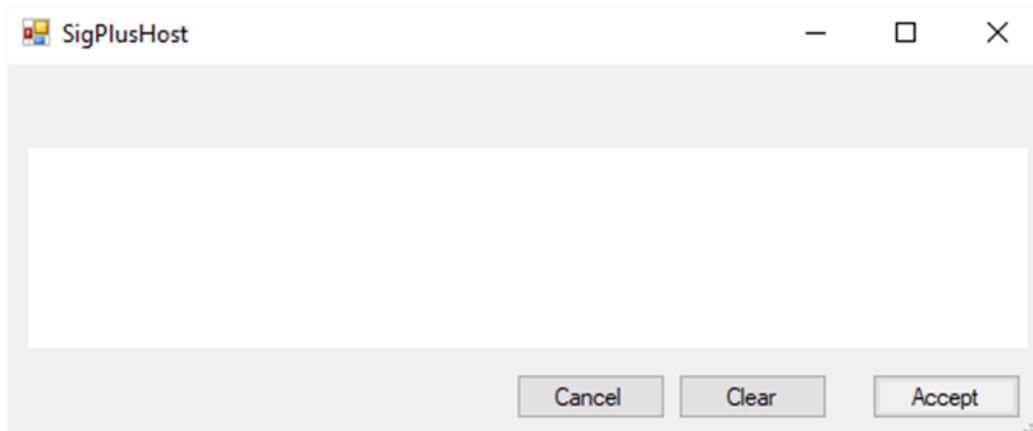
Collect Signature - Internet Explorer [Min] [Max] [Close]

Please make sure TRAKiTConnect is running and sign on the SignPad.

Close

4. Sign on the signature pad and then select one of the following buttons:
 - Select **Accept** to save the signature and include it on the printed document. After you select **Accept**, the pop-up window closes and you can print the document.
 - Select **Clear** to erase the signature and sign again.

- Select **Cancel** to close the signature window without saving a signature. You will not be able to print the document.



Inspections

Use the **Inspections** pane to manage inspection information associated with a record in Permitting, Projects and Planning, Code Compliance, or Licensing.

Inspections (10)					
Add Inspection Add Calendar Set Sequence					Filter Default
<input checked="" type="checkbox"/>	**BUILDING FINAL	Inspector <i>(no inspector)</i> Remarks <i>(no remarks)</i>	Scheduled <i>(mm/dd/yy) (hh:mm)</i> 180 mins Completed <i>(mm/dd/yy) (hh:mm)</i>	Result <i>(no result)</i>	Edit
<input checked="" type="checkbox"/>	DRYWALL	Inspector <i>(no inspector)</i> Remarks <i>(no remarks)</i>	Scheduled <i>(mm/dd/yy) (hh:mm)</i> 60 mins Completed <i>(mm/dd/yy) (hh:mm)</i>	Result <i>(no result)</i>	Edit

Scheduling inspections

You can schedule inspections from the [Inspections pane](#), from the Community Development [calendar](#), or using the [Batch Scheduler feature](#). From the **Inspections** pane you can schedule inspections for a single record. From the Community Development calendar and Batch Scheduler, you can schedule inspections for multiple records.

Note: Depending on your setup, some inspections might require prerequisite inspections to be completed with a specified status before you can schedule the inspection. If you attempt to schedule an inspection before the prerequisites are completed, the inspection is not scheduled and Community Development displays a message indicating which prerequisites are not met.

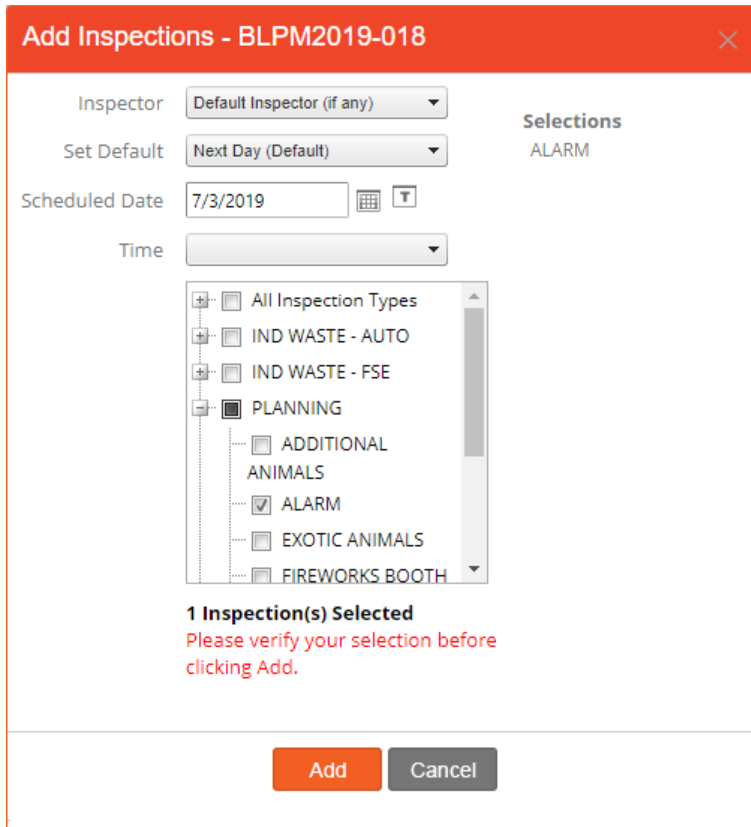
Your system administrator defines the prerequisites in Web Utilities & Maintenance (WUM).

Using the Inspections pane

To schedule inspections on a single record, complete the following steps:

1. Go to the record you want to work with.
2. Open the **Inspections** pane.
3. Select **Add Inspection**.
4. Complete the inspections information:
 - Select an inspector.
 - In the **Set Default** field, select a default date setting:
 - **Next Day:** Sets the scheduled date to the next calendar day.
 - **Today:** Sets the scheduled date to the current date.
 - **Specified Date:** Sets the date to the date you enter in the **Scheduled Date** field.

- **Next Available:** Sets the scheduled date to the soonest available date. This option is valid only if the Inspection Cap feature is in use.
- **No Specified Date:** No date is set.
- Select the time of the inspection, if applicable.
- Select one or more inspections to schedule.
- Depending on your database settings, additional fields might be listed, such as **Completed Date** and **Result**. Complete the fields.



5. Select **Add**.

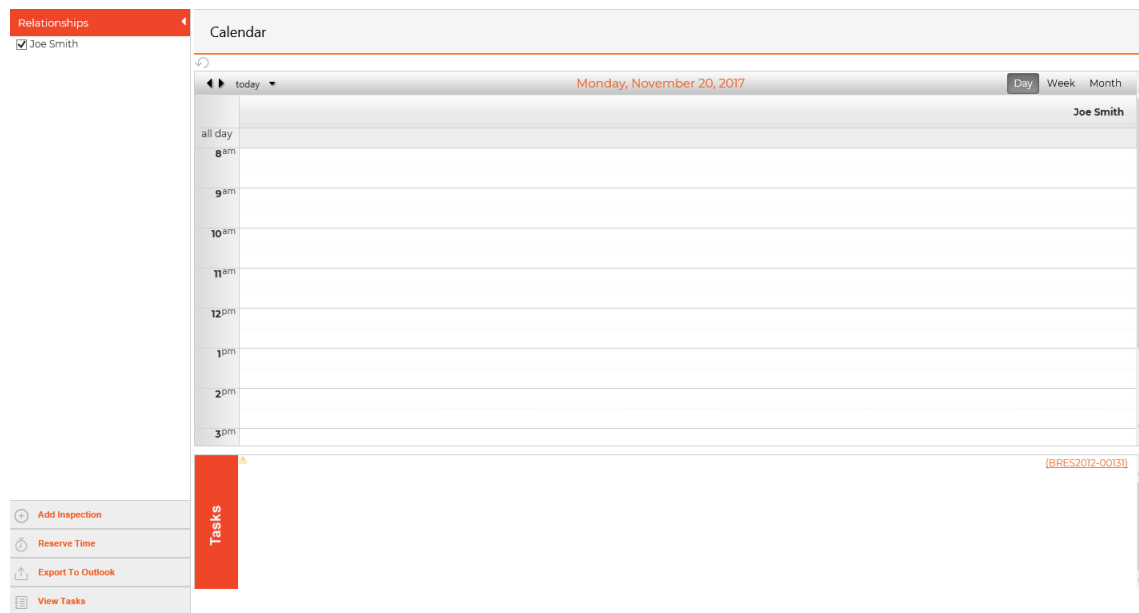
Note: If you set the **Scheduled Date** field to a date or time in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

6. If the inspection type has custom screens that your agency requires to be completed when the inspection is added, select **Edit** in the **Inspections** pane. Complete the custom fields and then select **Save**.

Using the calendar

Use the Calendar feature to add inspections, reschedule inspections, result inspections, reserve time, export an inspection to Microsoft Outlook, and view tasks. To access your calendar, point to your name in the Community Development application header and then select **My Calendar**.

Tip: You can add the Calendar to your **Favorites** menu and then access it by pointing to **Favorites** and selecting **Calendar**. For more information about adding features to your **Favorites** list, see [Favorites](#).



If you added other users' calendars in user **Options > Preferences > Calendar**, the list of available calendars appears in the **Relationships** pane. Select the check box for calendars you want to view. If you have the System Wide FULL ACCESS privilege, you can see other users' reserved time. If you do not have the System Wide FULL ACCESS privilege, you can see all activity except reserved time.

You can view the calendar by day, week, or month. In the **Day** view, you can see multiple calendars side by side. In the **Week** or **Month** view, you can see one calendar at a time.

To use the calendar function to schedule inspections, access the calendar and then complete the following steps:

1. Select **Add Inspection**.



2. Search for the record.

3. In the results listing, find the record you want and select the link in the **Record #** column.
4. Complete the inspections information:
 - Select an inspector.
 - In the **Set Default** field, select a default date setting:
 - **Next Day**: Sets the scheduled date to the next calendar day.
 - **Today**: Sets the scheduled date to the current date.
 - **Specified Date**: Sets the date to the date you enter in the **Scheduled Date** field.
 - **Next Available**: Sets the scheduled date to the soonest available date. This option is valid only if the Inspection Cap feature is in use.
 - **No Specified Date**: No date is set.
 - Select the time of the inspection, if applicable.
 - Select one or more inspections to schedule.

Add Inspections - BLPM2019-018
×

Inspector Default Inspector (if any) ▼

Set Default Next Day (Default) ▼

Scheduled Date 7/3/2019 📅 🕒

Time ▼

☐ All Inspection Types

☐ IND WASTE - AUTO

☐ IND WASTE - FSE

☒ PLANNING

☐ ADDITIONAL ANIMALS
☒ ALARM
☐ EXOTIC ANIMALS
☐ FIREWORKS BOOTH

Selections

ALARM

1 Inspection(s) Selected

Please verify your selection before clicking Add.


Add
Cancel

5. Select **Add**.

If you set the **Scheduled Date** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

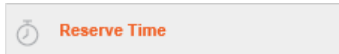
Tips:

You can drag an inspection item to another date or another authorized inspector's calendar.

To edit the details of a scheduled inspection, select **Edit Appointment**  in the calendar appointment.


To add reserved time to your calendar, access the calendar and then complete the following steps:

1. Select **Reserve Time**.



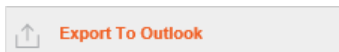
2. Enter a date.
3. Enter a description (for example, **Out of Office**).
4. If you want to reserve a half day or whole day, select the appropriate option in **Time Options**. The options are:
 - **Unavailable** or **All Day**: Reserves the entire work day.
 - **Morning**: Reserves 8 AM to 12 PM.
 - **Afternoon**: Reserves 1 PM to 5 PM.
5. If you did not select an option in **Time Options**, select times. Time is reserved in hour increments. Select the start time to reserve one hour (for example, select **9:00 am** to reserve one hour from 9 AM to 10 AM). Select the beginning and end times to reserve more than one hour. For example, select **12:00 pm** and **3:00 pm** to reserve three hours from 12 PM to 3 PM.

To change the details of the reserved time, double-click the entry on the calendar.

To delete the reserved time, select  in the entry on the calendar and then select **OK**.

To export a scheduled inspection to Microsoft Outlook, access the calendar in Community Development and then complete the following steps:

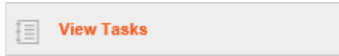
1. Select the inspection on your Community Development calendar.
2. Select **Export To Outlook**.



3. Select **Open**.

4. Adjust the details as needed.
5. Save and close the task.

Your tasks (Chronology activities) appear on your calendar in the **Tasks** pane when you view your calendar by day or week. To show or hide the **Tasks** pane, select **View Tasks**.



From the **Tasks** pane, you can:

- Select the task title to edit the task
- Select the record number to open the record

Using the Batch Scheduler feature


Use the Batch Scheduler feature to schedule inspections for multiple records from a single screen.

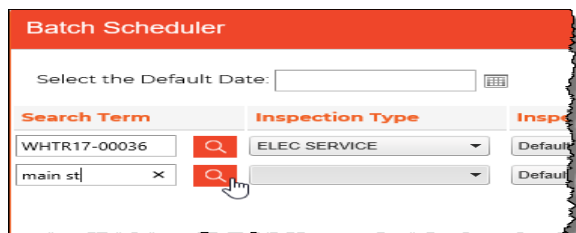
Note: To use Batch Scheduler, you must first add Batch Scheduler to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

To use Batch Scheduler, complete the following steps:

1. Point to **Favorites** and then select **Batch Scheduler**.
2. If you want to apply a default date, time, or remark to all the inspections you are scheduling, complete the following fields:
 - Set Default Date
 - Set Default Time
 - Set Default Remarks

If you change any of these fields after you add inspections to the batch, the existing inspections are updated with the new default values.

3. Search for the first record you want to schedule by typing in the **Search Term** field and then selecting . You must enter at least three characters in the **Search Term** field.

A screenshot of the "Batch Scheduler" web interface. At the top is a red header bar with the text "Batch Scheduler" in white. Below the header, there is a form with several fields. On the left, there is a "Search Term" field with the text "WHTR17-00036" and a magnifying glass icon to its right. Below this, there is another "Search Term" field with the text "main st" and a magnifying glass icon to its right. To the right of the "Search Term" fields, there is an "Inspection Type" dropdown menu with "ELEC SERVICE" selected. To the right of the "Inspection Type" dropdown, there is a "Default" button. At the bottom of the form, there is a "main st" field with a magnifying glass icon to its right.

If the search returns only one result, that result is added to the inspection list. The results listing does not appear. Skip the next step.

4. In the results listing, select the link in the **Record #** column to select the record.

Batch Scheduler				
Search: <input type="text" value="main"/>		<input type="button" value="Q"/>	<input type="button" value="All Modules"/>	
Record #	Result	Source	Type	
CUSE2013-0001	342 MAIN ST	Site Address	CONDITIONAL USE P...	3
DEVP1711-0001	123 MAIN STREET A	Site Address	DEVELOPMENT PER...	1
DEVP2013-0009	AKIN GER MAINE GRANGER T...	Owner name	DEVELOPMENT PER...	1
DPLR1603-0001	342 MAIN ST	Site Address	DEVELOPMENT PLA...	3
PAPP1603-0006	123 MAIN STREET A	Site Address	PREAPPLICATION	1
PAPP1604-0001	318 MAIN ST	Site Address	PREAPPLICATION	3
PAPP1604-0002	342 MAIN ST	Site Address	PREAPPLICATION	3
PAPP1604-0003	342 MAIN ST	Site Address	PREAPPLICATION	3
PAPP1709-0015	1456 MAIN ST	Site Address	PREAPPLICATION	1

5. Select the inspection type and inspector name.
6. If you did not set a default date, time, or remarks, or if you want to customize those fields for this inspection, update the **Date**, **Time**, and **Remarks** fields.

Batch Scheduler						
Set Default Date: <input type="text" value="8/16/2018"/>		Set Default Time: <input type="text"/>		Set Default Remark: <input type="text" value="from IVR"/>		
Search Term	Inspection Type	Inspector Name	Date	Time	Remarks	
WHTR17-00036	DRYWALL	Default Inspector (if a	<input type="text" value="8/16/2018"/>	<input type="text" value="8:00AM"/>	<input type="text" value="from IVR"/>	
CTR1803-0001	ANNUAL INSPECTION	Default Inspector (if a	<input type="text" value="8/16/2018"/>	<input type="text" value="9:00AM"/>	<input type="text" value="from IVR"/>	
<input type="text"/>		Default Inspector (if a	<input type="text" value="8/16/2018"/>	<input type="text" value="8:00AM"/>	<input type="text" value="from IVR"/>	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>						

7. To add another inspection, select or press Tab from the **Remarks** field.
8. Repeat steps 3–7 to add the inspection.

Note: To remove an inspection before you complete the batch scheduling, select in the row for the inspection you want to remove.

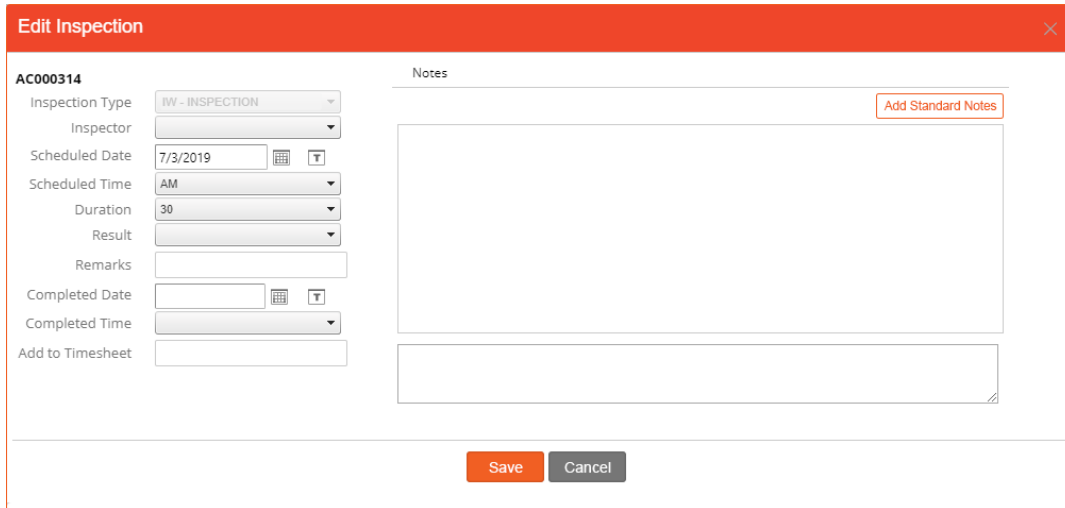
9. After you add all inspections for the batch, select **Save**.

Note: You cannot add inspections that cause a capped inspector to exceed his or her cap.

Entering inspection results

To enter inspection results on a single record in Permitting, Projects and Planning, Code Compliance, or Licensing, open the record in the module and complete the following steps:

1. Expand the **Inspections** pane.
2. Select **Edit** in the row for the inspection you want to change.
3. Update fields in the left area of the **Edit Inspection** dialog box:
 - **Inspection Type:** Type of inspection. Typically, you will not change this field, but you can, if necessary.
 - **Inspector:** Select the name of the inspector who completed the inspection.
 - **Scheduled Date:** Enter the scheduled date of the inspection.
 - **Scheduled Time:** Select the scheduled time of the inspection.
 - **Duration:** Select the duration of the inspection in minutes.
 - **Sequence:** For a series of inspections that must occur in a specific order, enter the sequence number for this inspection.
 - **Result:** Select the result code.
 - **Remarks:** Enter remarks.
 - **Completed Date:** Enter the date the inspection was completed.
 - **Completed Time:** Enter the time the inspection was completed.
 - **Add to Timesheet:** Enter the amount of accumulated time spent on the activity.
4. The right area of the **Edit Inspection** dialog box contains the **Notes** tab as well as tabs for custom screens, if your agency set up custom screens for this inspection type. Update fields on each tab as needed according to your agency's policies.



The 'Edit Inspection' dialog box has a red header bar with the title 'Edit Inspection' and a close button. Below the header, the ID 'AC000314' is displayed. The form is divided into two main sections. The left section contains several fields: 'Inspection Type' (a dropdown menu showing 'RW - INSPECTION'), 'Inspector' (a dropdown menu), 'Scheduled Date' (a date picker showing '7/3/2019'), 'Scheduled Time' (a dropdown menu showing 'AM'), 'Duration' (a dropdown menu showing '30'), 'Result' (a dropdown menu), 'Remarks' (a text input field), 'Completed Date' (a date picker), 'Completed Time' (a dropdown menu), and 'Add to Timesheet' (a checkbox). The right section is titled 'Notes' and contains a large text area with an 'Add Standard Notes' button in the top right corner. At the bottom of the dialog, there are two buttons: 'Save' (in orange) and 'Cancel' (in grey).

5. Select **Save**.

Note: If you set the **Scheduled Date** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

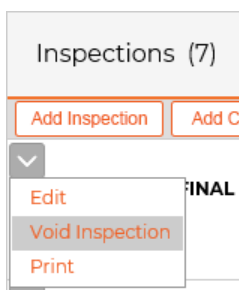
Tip: Depending on your setup, inspection results might trigger automatic reinspections or reinspection fees.

Voiding inspections

Users who do not have the CAN DELETE INSPECTIONS privilege can void inspections but not delete them. An inspection must be voided before it can be deleted.

To void an inspection, open the record in the module and complete the following steps:

1. Expand the **Inspections** pane.
2. Select **Void Inspection** from the functions menu.
3. Select **Yes**.



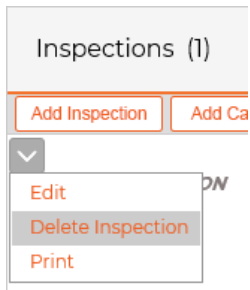
The image shows a UI element titled 'Inspections (7)'. Below the title are two buttons: 'Add Inspection' and 'Add C'. Below these buttons is a dropdown menu with a downward arrow icon. The dropdown menu is open, showing three options: 'Edit', 'Void Inspection' (which is highlighted in grey), and 'Print'. To the right of the dropdown menu, the word 'FINAL' is partially visible.

Deleting inspections

Only system administrators or users with the CAN DELETE INSPECTIONS privilege can delete inspections. An inspection must be voided before it can be deleted.

To delete an inspection, open the record in the module and complete the following steps:

1. Expand the **Inspections** pane.
2. Select **Delete Inspection** from the functions menu.



3. Select **Yes**.

Chronology

Use the **Chronology** pane to view and manage actions associated with an activity record. Activity records can have standalone actions as well as actions that are related to an event.

The **Chronology** pane listing includes the following details:

- **Action title.**
- **Staff:** Agency member responsible for completing the action.
- **Action:** Date the action should be completed.
- **Completed:** Date the action was completed. If this is blank, the action is not completed.
- **Event Type:** Event that this action is associated with, if the action was added through the **Schedule Event** function.


Note: The event type information is available for event-related actions added after you installed release 18.1 HF07 or later. **Event Type** is blank for actions added in earlier releases, even if the action is associated with an event.


Chronology (8)					
Add Actions Schedule Event Edit Event			Filter Default		
▼	30 Day Early Issue Sent	Staff System	Action 1/11/2020	Completed (mm/dd/yyyy)	Event Type (no event associated) Edit
▼	Newspaper Notices	Staff System	Action 1/3/2018	Completed (mm/dd/yyyy)	Event Type (no event associated) Edit
▼	Planning Meeting	Staff Joe User	Action 7/17/2019	Completed (mm/dd/yyyy)	Event Type Planning Commission Edit
▼	Action Letter to Applica...	Staff Joe User	Action 8/1/2019	Completed (mm/dd/yyyy)	Event Type Planning Commission Edit
▼	Reports Sent to Commissi...	Staff Joe User	Action 7/9/2019	Completed (mm/dd/yyyy)	Event Type Planning Commission Edit
▼	Staff Reports	Staff Joe User	Action 7/3/2019	Completed (mm/dd/yyyy)	Event Type Planning Commission Edit
▼	Mailed Notices	Staff Joe User	Action 6/26/2019	Completed (mm/dd/yyyy)	Event Type Planning Commission Edit

From the **Chronology** pane, you can access the following functions:

- **Add Actions** button: Select this button to add a standalone action to the activity record. For more information about adding actions, see [Adding actions](#).
- **Schedule Event** button: Select this button to schedule an event and prerequisite actions for this activity record. For more information about events, see [Using the Event Scheduler](#).
- **Edit Event** button: Select this button to change an event (a group of actions) for this activity record. For more information about events, see [Using the Event Scheduler](#).
- **Edit** button and **Edit** function: Select the **Edit** button in a row or choose **Edit** from the functions menu to change an action. For more information about modifying actions, see [Editing actions](#).

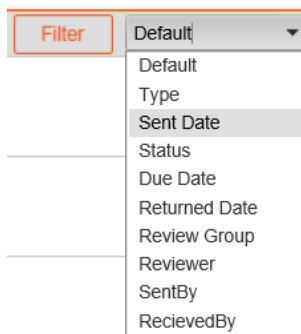
- **Void Item:** From the functions menu, select **Void Item** to void an action before it is deleted. For more information, see [Voiding actions](#).
- **Delete Item:** From the functions menu, select **Delete Item** to delete an action. For more information, see [Deleting actions](#).
- **Print:** If your agency setup includes printable documents for actions, select **Print** on the functions menu to print an available document. For a document to be available to print, your administrator must add the document to the module's **Chronology** folder in SSRS manager, and add the document in WUM (**System Settings > Interfaces > Forms & Reports > Add Report from SSRS**).

A notes icon  in the row indicates notes on the action. Point to the icon to view the notes. Select the icon to open the **View Notes** dialog box where you can view full details of notes, sort notes, or search for notes.



A void icon  indicates the action was voided and can be deleted by a user with delete privileges.

You can also filter and sort the listing:

- To sort the listing, select an option from the drop-down list.



- To filter the listing, complete the following steps:
 1. Select the **Filter** button.
 2. Select the **Enable Filter** check box.
 3. Select the criteria you want to use to filter the listing.
 4. Select **Save**. Actions that meet the criteria you selected appear in the **Chronology** pane.
- To remove the filter, select the **Filter** button, clear the **Enable Filter** check box, and then select **Save**.

Note: When the filter is disabled, the **Filter** button has a white background . When a filter is enabled, the **Filter** button has a gray background .

Adding actions

To add a single action to a record, go to the activity record and then complete the following steps:

1. Open the **Chronology** pane.
2. Select **Add Actions**.
3. Enter the following activity details for the action:
 - a. Select the staff member responsible for completing the action.
 - b. Enter the date the action should be completed. If you select multiple actions in the next step, this date applies to all of the actions you add.
 - c. Select one or more action types. The actions you select appear in the **Selected** area of the dialog box.
 - d. Add notes as necessary. If you selected multiple actions, you cannot add notes.

Add Actions - 011-TEMP

Staff: ECON DEV

Action Date: 7/2/2019

Notes:

Selected:

IN PERSON MEETING
1ST NOV SENT

ALL ACTION TYPES

- ☐ PHONE CALL
- ☐ EMAIL
- ☒ IN PERSON MEETING
- ☒ 1ST NOV SENT
- ☐ 2ND NOV SENT
- ☐ 3RD NOV SENT
- ☐ 4TH NOV SENT

Add **Cancel**

4. Select **Add**. The actions appear in the **Chronology** pane for the activity record and in Workspace **My Tasks** pane for the assigned staff member.

Editing actions

To edit a single action, go to the activity record and complete the following steps:

1. Open the **Chronology** pane.
2. Select the **Edit** button in the row or choose **Edit** from the functions menu.
3. Update fields as needed.
4. Select **Save**.

Edit Action

DSR1903-00000001

Links

Action Type

Phone Call

Staff

Joe User

Action Date

6/10/2019

Today

Completed Date

Today

Add to Timesheet

Save

Cancel

Using the Event Scheduler

An event is a series of actions that are related and occur in a sequence in a specified time frame. Your system administrator defines events in WUM. When you add the event to an activity record in Community Development, the Event Scheduler automatically schedules all the related actions. The due dates of action items are calculated based on the target date for the event.

Example: You want to schedule a public hearing for May 1. A Public Hearing event is already set up in WUM with a staff meeting 30 days prior to the hearing and a public notice 15 days prior to the hearing. When you schedule the event on an activity record, the Event Scheduler adds a staff meeting on April 1 and a public notice on April 15.

Tip: Events and prerequisites must be set up in WUM before this feature can be used in Community Development.

Adding an event

To add an event, go to the activity record and complete the following steps:

1. Open the **Chronology** pane.
2. Select **Schedule Event**.
3. Select an event type. Actions related to the event type appear in the dialog box.
4. Select the event date. Actions related to the event type appear in the dialog box.
5. For each action, modify the date or user, if needed. To delete an action, select **×** next to the action.

Schedule Event - SUBD2013-0049
✕

SUBD2013-0049

Event Type City Council Meeting

Event Date 5/15/2018

Actions to be Created **City Council Meeting**

4/23/2018	Joe User	15-day Notice	✕
4/25/2018	Joe User	Director Review and Approval	✕
4/30/2018	Joe User	Submit to Secretary	✕
5/12/2018	Joe User	Agenda Packet Review	✕
5/15/2018	Joe User	Council Meeting	✕
5/29/2018	Joe User	Action Recorded	✕

Cancel
Schedule

6. Select **Schedule**. All actions associated with the event appear in the **Chronology** pane.

Editing an event

Use the **Edit Event** button to change the date of an existing event on an activity record or to change details of actions related to the event. The **Edit Event** button is enabled only if you use the Cascading Dates feature for the event type and the record has pending (not completed) actions associated with the event.

Tip: The Cascading Dates feature automatically updates dates on future actions for an event when you change the date of the event or one of the related actions in Community Development. In WUM, you can choose whether to use this feature for each event type you set up.

To edit an event, go to the activity record and complete the following steps:

Note: If you want to change staff member assignments only and not the event or action dates, you need to know the current event date before you begin this procedure.

1. Open the **Chronology** pane.
2. Select **Edit Event**.
3. In the **Event Type** field, select the event you want to edit. The list includes all events currently on the activity record. If a record has multiple instances of the same event type, the multiple event types are numbered in the order you added them. For example: Public Hearing 1, Public Hearing 2, and so on.
4. In the **Event Date** field, enter the event date. After you select the event date, a list of pending actions for the event appears. Community Development automatically adjusts the dates of

the pending actions based on the new event date. If you do not want to change the date of the event, enter the date currently assigned to the event date.

5. Update the actions. You can make the following changes to the pending actions:
 - Change the action date
 - Change the staff member responsible for the action
 - Remove the action from the dialog box so that the action is not updated
6. Select **Schedule** to save your changes. Or select **Cancel** to close the dialog box without saving your changes. Community Development adds a note to actions you update.

Voiding actions

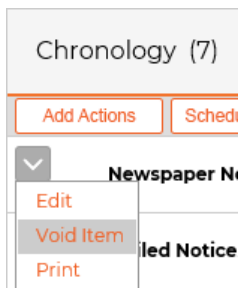
In Permitting, Projects and Planning, and Code Compliance, users who do not have the CAN DELETE CHRONOLOGY privilege can void actions but not delete them.

In Licensing and Entity Management, users can delete actions without voiding them first. No special privileges are required.

For more information about deleting actions, see [Deleting actions](#).

To void action items, complete the following steps:

1. Go to the record you want to work with.
2. Expand the **Chronology** pane.
3. Select **Void Item** from the functions menu.



4. Select **Yes**.

Deleting actions

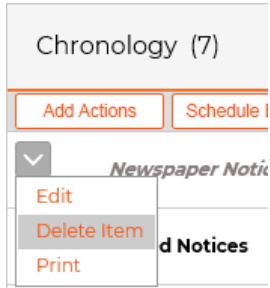
In Permitting, Projects and Planning, and Code Compliance, only system administrators or users with the CAN DELETE CHRONOLOGY privilege can delete actions. An action must be voided before it can be deleted.

In Licensing and Entity Management, users can delete actions without having to void the action first. No special privileges are required.

For more information about voiding actions, see [Voiding actions](#).

To delete an action, open the record in the module and then complete the following steps:

1. Expand the **Chronology** pane.
2. Select **Delete Item** from the functions menu.



3. Select **Yes**.

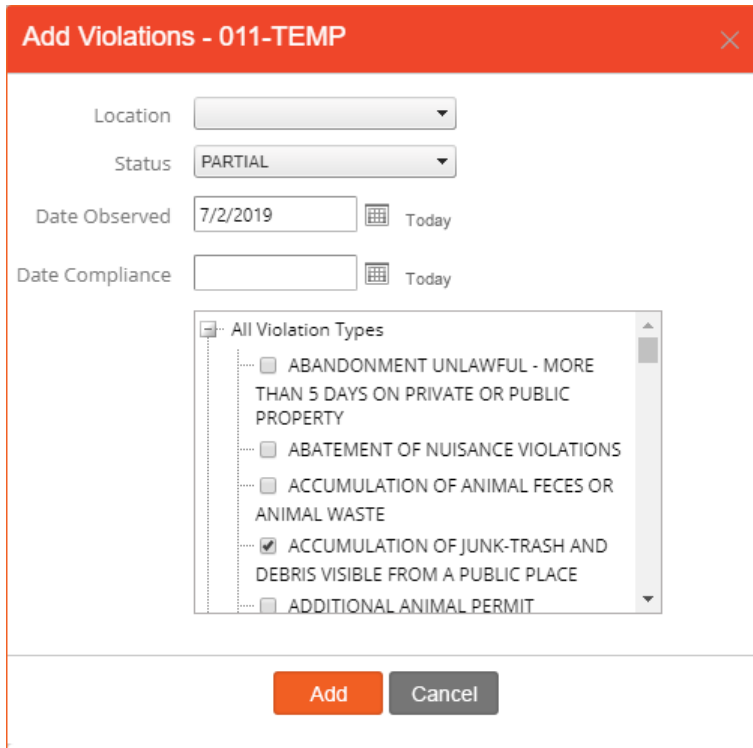
Violations

Community Development manages code enforcement violations through the **Violations** pane. Depending on your setup, Code Compliance handles violations in one of two ways: a single violation per case record or multiple violations per case record. Contact your system administrator for details about how your system is set up.

Adding violations

To add violations to a case record, complete the following steps:

1. Locate the case in Code Compliance.
2. Expand the **Violations** pane.
3. Select **Add Violations**.
4. Select a location.
5. Select a status for the violation.
6. Select the date that the violation was reported.
7. Select one or more violations to add to the case.



8. Select **Add**.

Note: If you set the **Date Observed** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

Editing violations

To edit violations on a case record, complete the following steps:

1. Locate the case in the Code Compliance module.
2. Expand the **Violations** pane.
3. Select **Edit** in the row for the violation you want to change.
4. Update fields in the left area of the **Edit Violation** dialog box:
 - a. **Violation Type**
 - b. **Location**
 - c. **Date Observed**
 - d. **Status**
 - e. **Date Corrected**
 - f. **Remarks**
5. Add notes in the right area of the dialog box.

The screenshot shows the 'Edit Violation' dialog box. The left pane contains the following fields:

- Violation Type: Construction/addition without p
- Location: [Dropdown]
- Date Observed: [Date Picker] Today
- Date compliance: [Date Picker] Today
- Status: COMPLIANCE
- Date Corrected: [Date Picker] Today
- Remarks: [Text Field]

The right pane is titled 'Notes' and contains:

- Links button
- Add Standard Notes button
- Note text: 7/9/2012 10:55:00 AM (System) CBC Chapter 1 Work without permit

At the bottom are Save and Cancel buttons.

6. Select **Save**.


Note: If you set the **Date Observed** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

Notes

Use the Notes feature to add a long description to a Permitting, Projects and Planning, Code Compliance, or Entity Management record. You can add standard (predefined) notes or custom notes.

Adding notes

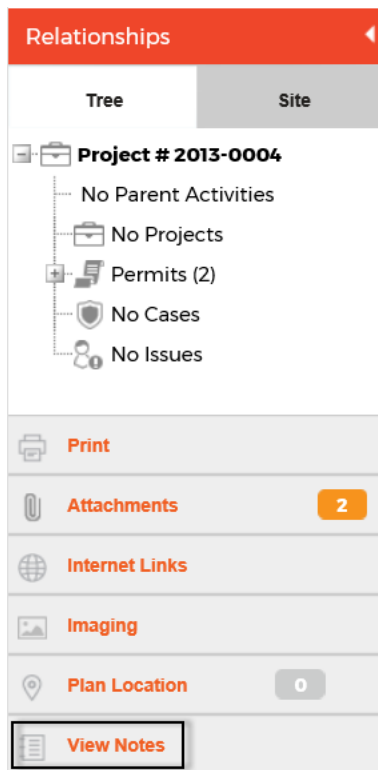
To use the Notes feature:

1. Locate the activity record.
2. From the main information pane, select  **Notes**.
3. Enter your notes.
4. Select **Save**.

The  **Notes** button changes to  **Notes** after a note is added to the record.

Viewing notes

To view all notes associated with an activity record, go to the record and then select **View Notes** in the **Relationships** pane.



The **View Notes** dialog box appears. In this dialog box, you can view notes, filter notes, and sort the notes in date or type order.

View Notes

ABVH2015-0002

Type (Asc) **GO**

CASE NOTES

Joe Smith
Abandoned vehicle with no license plate.
11/20/2017 2:04:05 PM

VIOLATIONS

Joe Smith
8.40.070(a) Every pool shall be enclosed by a barrier/fence
11/20/2017 1:39:27 PM

Close

To limit the notes in the listing, enter a word or phrase in the search field and select **Go**. To clear the filter, delete the search word or phrase and then select **Go**.

Standard notes

Use the Standard Notes feature to add predefined notes to an existing inspection, review, violation, or condition. The note can be unique to a functional area or a user. Standard notes are configured by your system administrator.

To add a standard note, complete the following steps:

1. Go to the record you want to work with.
2. Open the **Inspections**, **Reviews**, **Violations**, or **Conditions** pane.
3. Select **Edit** in the row for the item you want to add standard notes to.
4. Select **Add Standard Notes**.
5. Select one or more standard notes from the list.
6. Select **OK**.

Edit Review

SUBD2013-0049

Review TypeBUILDING

Reviewer

Date Sent6/10/2018Today

Date Due6/17/2018Today

Status

Remarks

Date ReturnedToday

Add to Timesheet

Add Standard Notes

☐ Provide dashed lines showing the names and widths of adjacent recorded subd...

☒ Clearly identify Phasing or Sections

☐ Easements: a. All existing easements encumbering the property shall be dep...

☐ Designation of any special purpose lots (i.e., park, landscaping, detention...

☒ Plat summary table: The following completed information shall appear in ONE...

OK

Cancel

Save

7. Select **Save**.

Conditions

Use the **Conditions** function to track conditions imposed on a Permitting, Projects and Planning, or Licensing record.

Conditions can be entered manually or using standard text (standard text requires setup by a system administrator) and can be edited for each record.

Notes as long as 8,000 characters can be added to conditions in Permitting and Projects and Planning.

Adding conditions

To add a condition, locate the Permitting, Projects and Planning, or Licensing record and then complete the following steps:

1. Expand the **Conditions** pane.
2. Select **Add Conditions**.
3. Complete the fields:
 - Select a department.
 - Select a contact.
 - Select a status.
 - Enter the date the condition is being added.
 - Enter a due date.

- Select one or more conditions.

Add Conditions - B1906-00000006

Department

Building and Safety

Contact

Default Contact (if any)

Status

REQUIRED

Date Added

7/2/2019

Date Due

☐ All Condition Types
 ☐ AIR QUALITY MD
 ☐ AV UNION HIGH SCHOOL
 ☐ BUILDING
 ☒ PLAN CHECK AND PERMIT FEES PAID
 ☐ CONCURRENT REVIEW RELEASE

1 Condition(s) Selected

Please verify your selection before clicking Add.

Add

Cancel

Selections

PLAN CHECK AND PERMIT FEES PAID

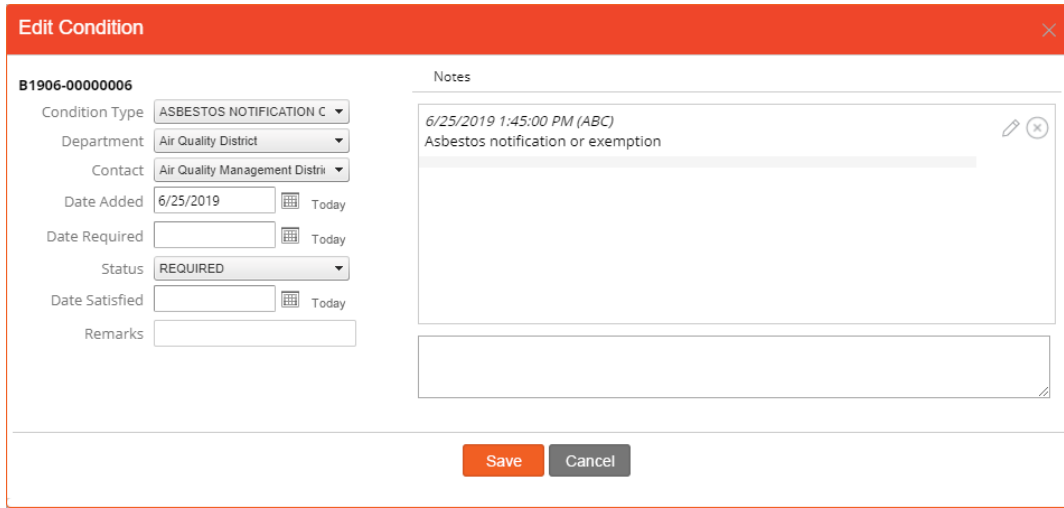
4. Select **Add**.

Note: If you set the **Date Added** or **Date Due** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

Editing conditions

To edit a condition, locate the Permitting, Projects and Planning, or Licensing record and then complete the following steps:

1. Expand the **Conditions** pane.
2. Select **Edit** next to the condition you want to change.
3. Enter or update information as needed.





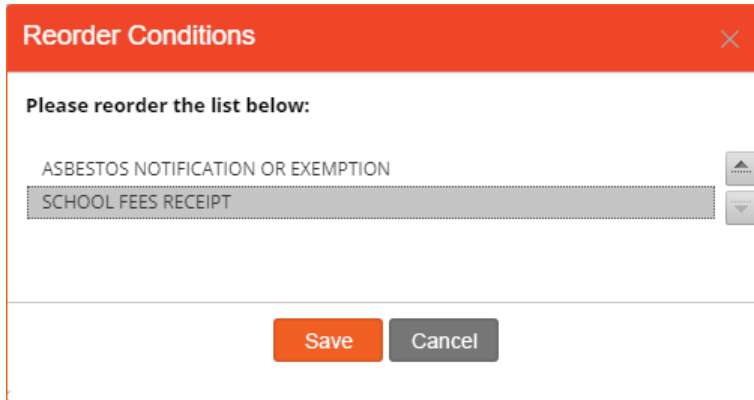
4. Select **Save**.

Note: If you set the **Date Added** or **Date Due** field to a date in the past, the action is logged in the audit table and a message appears. Select **OK** to continue with the date you selected or select **Cancel** to return to the dialog box and change the date.

Reordering conditions

Use the Reorder Conditions feature to define the sequence of conditions listed on an activity record. To reorder a set of conditions, locate the Permitting, Projects and Planning, or Licensing record and then complete the following steps:

1. Expand the **Conditions** pane.
2. Select **Reorder Conditions**.
3. Select a condition.
4. Select  to move the condition up or select  to move the condition down. Repeat this step with other conditions until all conditions are in the order you want.



Reorder Conditions [X]

Please reorder the list below:

ASBESTOS NOTIFICATION OR EXEMPTION	▲
SCHOOL FEES RECEIPT	▼

Save Cancel

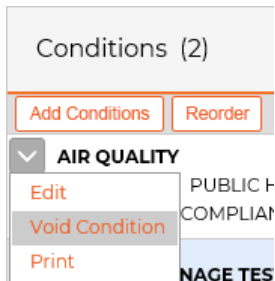
5. Select **Save**.

Voiding conditions

Users who do not have the CAN DELETE CONDITIONS privilege can void conditions but not delete them.

To void a condition, open the record in the module and complete the following steps:

1. Expand the **Conditions** pane.
2. Select **Void Condition** from the functions menu.



Conditions (2)

Add Conditions Reorder

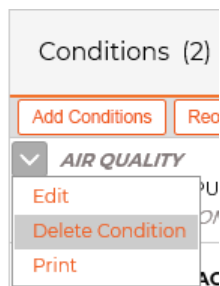
▼ **AIR QUALITY**

Edit	PUBLIC H
Void Condition	COMPLIAN
Print	NAGE TES

3. Select **Yes**.

Deleting conditions

Only system administrators or users with the CAN DELETE CONDITIONS privilege can delete conditions. A condition must be voided before it can be deleted.



Conditions (2)

Add Conditions Reorder

▼ **AIR QUALITY**


Edit	PU
Delete Condition	O/
Print	AC

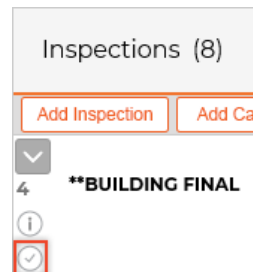
To delete a condition, open the record in the module and complete the following steps:

1. Expand the **Conditions** pane.
2. Select **Delete Condition** from the functions menu.
3. Select **Yes**.

Community Development checklists

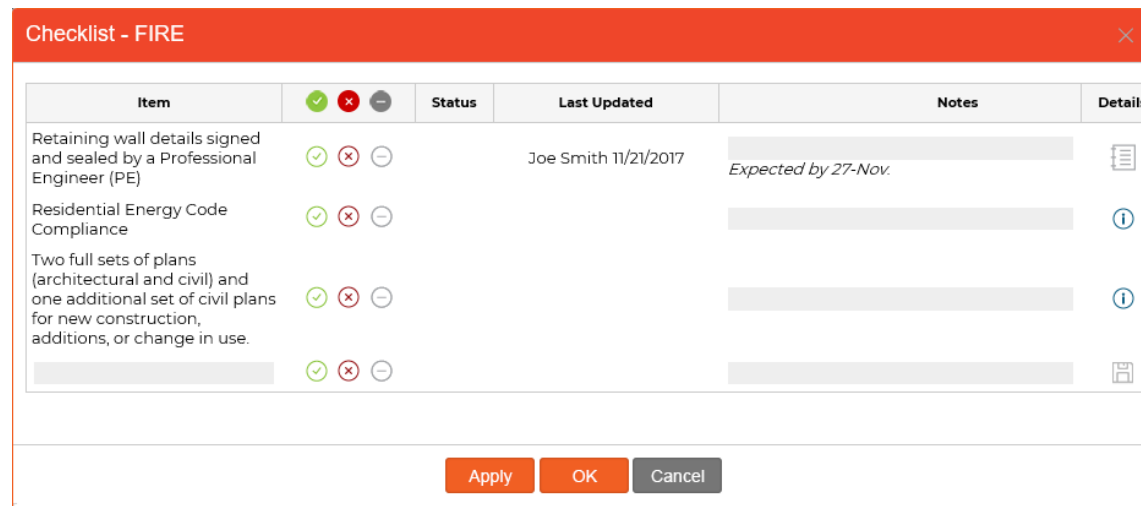
Use the Checklist feature to track the status of items that must be completed for an inspection or review. Your system administrator must configure checklists in Web Utilities & Maintenance (WUM) before the checklist can be used in Community Development. For more details about setting up checklists, refer to the *Community Development WUM guide*.

Each review type and inspection type can have its own checklist or no checklist. If a checklist is attached to an inspection or review,  appears in the **Inspections** or **Reviews** pane.



















Using checklists

Select  in the **Inspections** or **Reviews** pane to view the checklist.








The screenshot shows a dialog box titled "Checklist - FIRE". It contains a table with the following columns: Item, Status, Last Updated, Notes, and Details. The table has four rows of data, with the last row being a blank row for adding a new item. At the bottom of the dialog are three buttons: "Apply", "OK", and "Cancel".

Item	Status	Last Updated	Notes	Details
Retaining wall details signed and sealed by a Professional Engineer (PE)	  	Joe Smith 11/21/2017	Expected by 27-Nov.	
Residential Energy Code Compliance	  			
Two full sets of plans (architectural and civil) and one additional set of civil plans for new construction, additions, or change in use.	  			
	  			

The checklist includes the following columns:

- **Item:** List of items to be completed. The items are set up by your system administrator in WUM. You can also add a custom item that applies to this inspection or review only by typing an item in the last (blank) row in the listing.
- **Action:** Available actions. Select the icon in a row to update one item. Select the icon in the header to update all items that have no status to the status you select.

You can apply a status to multiple items but you cannot remove or change the status for multiple items. Statuses must be changed or removed for each item individually.

- Select  when an item passes inspection or review. The **Status** column changes to **Pass**. Select the icon again to remove the **Pass** status.
- Select  when an item fails the inspection or review. The **Status** column changes to **Fail**. Select the icon again to remove the **Fail** status.
- Select  if an item is not applicable for this inspection or review. The **Status** column changes to **NA**. Select the icon again to remove the **NA** status.
- **Status:** This column is blank until the inspection or review occurs. After the inspection or review, this column indicates your selection in the **Action** column.
- **Last updated:** Shows the most recent date the checklist item was changed and the person who made the change. This column is updated after you select **Apply** or **OK**.
- **Notes:** Shows the most recent comment about the item and enables you to add an additional comment. To add additional comments, type text in the box in this column and then select **Apply**.
- **Details:** Contains one of the following icons:
 -  : Select to view additional details. Select **Back** when you finish viewing.
 -  : Select to view a list of all notes for this item and the modified date. Select **Back** when you finish viewing.

Additional Details - Retaining wall details signed and sealed by a Professional Engineer (PE) ×

Current Status:

Notes	Modified
Waiting on PE.	11/21/2017 8:28:06 AM
Expected by 27-Nov.	11/21/2017 8:43:34 AM

Back

-  : Select to save a custom item that you added.

After you update all the items, select **Apply** and then **OK**. Or, select **Cancel** to close the checklist without saving your changes.

Checklist features

The following features are available when using checklists:

- When a reinspection or automatic next review is generated, checklists can be transferred automatically from the previous inspection or review of the same type.

- Certain actions are prevented when one or more checklist items are missing a status. For example, if one or more items are missing a status, you might not be able to change the status of the review.
- Certain workflow actions are triggered when giving a status to *all* items in a checklist. For example, if you update all items to **Pass**, the status of the inspection or review might be changed automatically.

Projects and Planning additional features

In the Projects and Planning module, you can set up triggers to prevent or enforce certain actions such as:

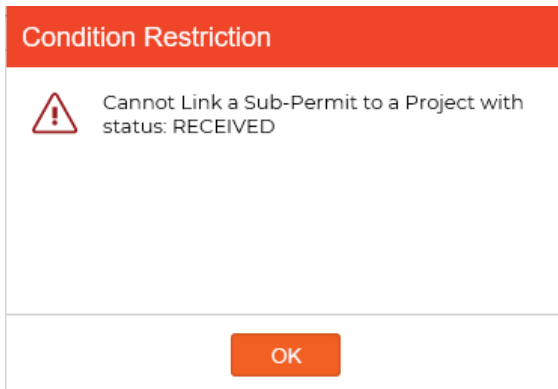
- Prevent the addition of subpermits based on the status of the project
- Prevent certain updates based on conditions
- Require a message to appear based on conditions

You can also synchronize descriptions, details, and dates from a project to its subprojects.

Triggers

When this feature is enabled, users can enforce locked conditions and impose restrictions on the creation of subprojects and subpermits based on the configuration of status conditions. You can set up restrictions to:

- Prevent the addition of subpermits based on status. For example, subpermits cannot be added to a project that has a status of **Received**.



- Lock the project status until specified conditions are satisfied. In this case, certain functions are not available until the conditions are satisfied.
- Lock the project fee status until specified conditions are satisfied. For example, you can add a condition that prevents a status change when fees are due.

Add Conditions - PAPP1903-0001
✕

Department BUILDING

Contact Default Contact (if any)

Status NOT IN COMPLIANCE

Date Added 7/2/2019

Date Due

☐ All Condition Types
☐ CITY PROJECTS

☒ CITY MUNICIPAL CODE
☐ LOCATION OF EASEMENT
☐ DEPARTMENT REQUIREME
☐ RESIDUAL COMPLIANCE

Selections

CITY MUNICIPAL CODE

1 Condition(s) Selected

Please verify your selection before clicking Add.

Add
Cancel

- Lock a project's subproject or subpermit status until specified conditions are met. In this case, certain functions are not available until the conditions are satisfied.

Condition Rule Selection

Please select the trigger(s) that you would like to link to this condition

☐ ENABLE SUB-PERMIT LIMITATION

Permit Types

List of Land Management Records

Number of Permits Allowed

0

☐ Apply a restriction message to All Linked Sites


Restriction Message

Confirm

Cancel

- Display a warning message to the user when a project's subproject or subpermit is created on a record with conditions.

Community Development

 There are restrictions. Do you want to continue?

Restrictions Found:


HOLD

Yes

No

- In eTRAKiT, display a warning message when a permit is created on a project that has conditions.

Location



Contact the Town for this - additional info needed to consider your request.

OK

Attachments

Filename

Select

Description

UPLOAD

CANCEL

NEXT STEP

Synchronizing project details

If the **Enable Project Sync Feature** check box is selected in WUM, you can add a project with linked subprojects and synchronized descriptions, details, and dates.

Synchronizing projects

When you add a project in the Projects and Planning module, select the **Sync Sub-Projects** check box to automatically update subprojects with the description, details, and dates from the parent project. Community Development sets the status of the subproject to **SYNC** to indicate that the subproject is linked to the parent project and will be updated when the parent project is updated.

Add Record

Create New: New Project

Record Type: PREAPPLICATION

Record Subtype: SITE PLAN

Prefix: PAPP Pre-Application Project

Description:

Number of Records: 1

Sync Sub-Projects: ☒ Set status to: ACTIVE

Add Multiple subProjects Linked to Parent Record:

Record Type: PREAPPLICATION Record SubType: SITE PLAN

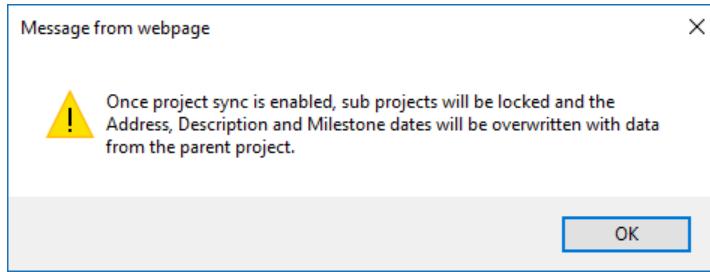
+ -

Cancel Add

Use options in the lower area of the dialog box to add subprojects to the parent project.

Unsynchronizing projects

If you decide that you want a synchronized subproject to have its own track to completion, you can unsynchronize (unsync) the subproject. To unsync a subproject, change its status to anything other than **SYNC**. A warning message appears and you must select **OK** to continue or select **×** to discard your changes.



If the subproject is later resynchronized, the descriptions, details, and dates from the parent project will *overwrite* any existing data in those fields. *Additional subproject information will be retained but not copied to the parent project.* The subproject is locked and a warning message appears. You must select **OK** to continue or select **×** to discard your changes.

Advanced License Processing

Use Advanced License Processing (ALP) to specify and perform license operations such as late fee assessment, automatic expiration, and email notification in bulk and unattended. Batch processes are set up in Web Utilities & Maintenance (WUM) and run in Community Development, where you can also view the resulting changes to Licensing records.

ALP is included with the purchase of Licensing.

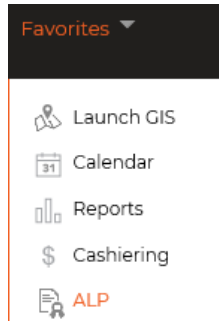
Before you can use ALP in Community Development, your system administrator must configure ALP options in WUM. For details about ALP configuration in WUM, refer to the *Community Development WUM guide*.

Note: Processes or operations you set up in ALP might not follow the usual workflows configured in WUM. CentralSquare recommends fully testing ALP configurations to verify expected results.

Accessing ALP for batch processing

To access ALP, first add ALP to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

After you add ALP to your **Favorites** list, access ALP by pointing to **Favorites** and then selecting **ALP**.



Setting up searches

ALP batch processing uses saved searches to build a list of licenses for possible inclusion in a batch. To be available for ALP processing, the saved search must be shared and copied to the ALP search group.

The saved search must include the LICENSE_NO item with the **Filter** column set to **No Filter**.

Sort	Type	Item	Display Name	Filter
		Licenses	LICENSE_NO	LICENSE_NO
				[No Filter]






Important: ALP cannot process records with fees that are not in the fee list in WUM. If you delete fees in WUM, you must also delete those fees from ALP configurations.

For more information about saving and sharing searches, refer to the following topics:

- [Saving searches](#)
- [Shared Searches tab](#)

Batch processing

To perform batch processing in ALP, complete the following steps:

1. Access ALP from the **Favorites** menu.
2. In the left pane, select the options you want to use to find licenses to update.
3. Select **Select** to see a list of licenses that meet your search criteria.
4. In the results listing, select the licenses you want to process. Information icons indicate whether the license can be renewed. The following information icons can appear in the listing:
 -  The license is ready to be renewed.
 -  The license is not eligible for renewal based on the renewal period.
 -  The license is not eligible for renewal based on user-supplied settings.
 -  The license is queued for processing.
 -  The license cannot be renewed because of a settings issue.
5. Verify your selection for the **Process Option** field.
6. Select **Submit**. The batch process appears in the **Processing Results** pane and batch processing occurs offline.

Use the **Processing Results** pane to perform the following actions:

- Review the status of a batch. The **Processing Results** pane displays the overall status of the batch. Select a date and time link to open the **Batch Operation Status** window and view more details about a batch process. In the **Batch Operation Status** window, you can select a link to view more details about updates for a specific license.
- Delete pending licenses in a submitted batch. To delete, select **×** in the **Delete** column. If all

licenses in a submitted batch are deleted, the batch is also deleted.

Processing Results				
	ID	Status	Notes	Delete
12/18/2017 3:24:19 PM	640	SUBMITTED		✖
12/18/2017 2:39:55 PM	639	SUBMITTED		✖
12/6/2017 10:30:54 AM	632	ERROR		
12/6/2017 10:29:25 AM	631	ERROR		
12/6/2017 9:31:03 AM	630	DONE		
12/6/2017 9:01:34 AM	629	DONE		
12/6/2017 8:36:58 AM	628	DONE		
12/5/2017 9:24:59 AM	627	ERROR		

Renewing a single license

You can renew a single license in Licensing if the license meets the following criteria:

- The license is not included in a batch that is being processed or is pending processing by ALP.
- The date you renew the license is within the renewal period for the license type. This applies only if license subtype settings are not established.
- The date you renew the license is within the renewal period for the license subtype, if a renewal period is set up for the license subtype. Note that subtype settings take precedence over type settings if subtype settings are established.
- The license was not renewed during the current renewal period.

Your system administrator sets up renewal periods in Web Utilities & Maintenance (WUM). For details about ALP configuration in WUM, refer to the *Community Development WUM guide*.

To renew a single license, locate the license in the Licensing module. Then, from the functions menu, select **Renew License**.

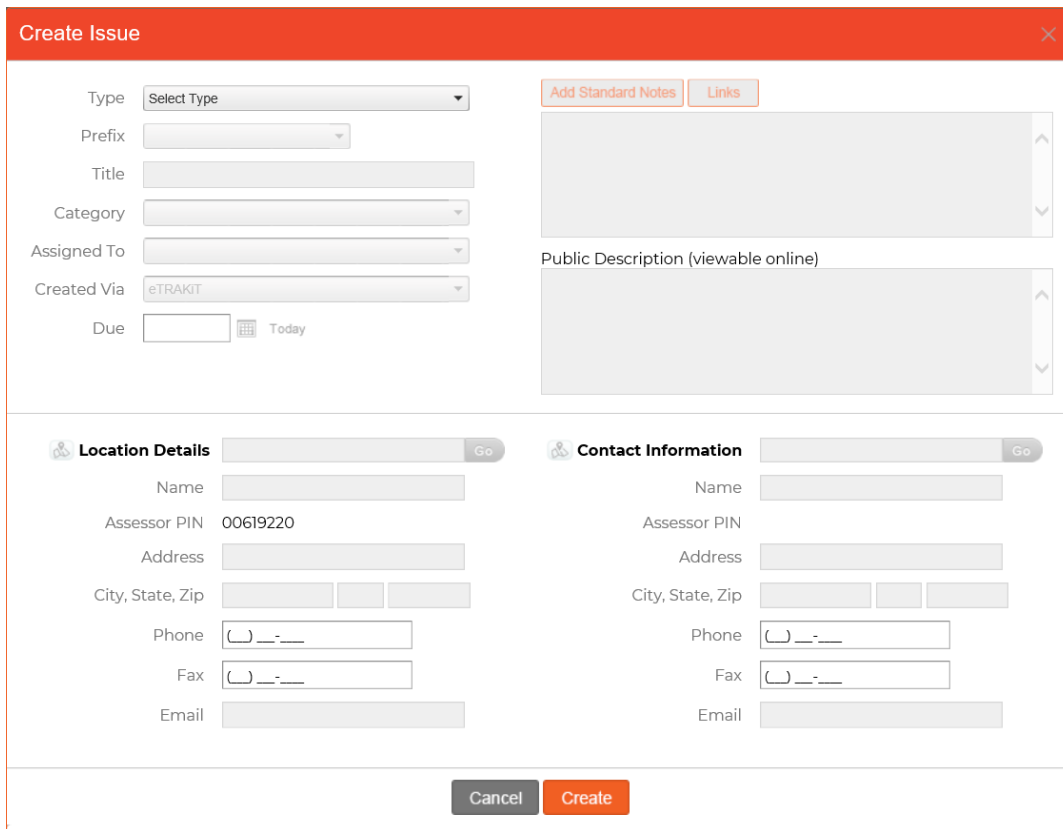
CRM

The CRM (Citizen Response Management) module provides the tools to efficiently and effectively manage citizen issues. CRM contains built-in workflow tracking so you can monitor open or closed issues and locations with recurring issues.



Adding issues

To add an issue, complete the following steps:

1. Open CRM.
2. From the functions menu, select **Add Record**.
3. In the **Create New** field, select **Issue**.
4. Select **Add**.




5. Complete the fields in the upper left area:
 - Type
 - Prefix (not required for all configurations)

- Title
 - Category
 - Assigned to
 - Created Via: Select how the issue was received
 - Due date
6. Enter customized notes, standard notes, or both.
 7. In the **Public Description** field, enter a description. This description appears on your eTRAKiT public website.
 8. In the **Location Details** section, search for a location or select  to select the location from a map. When you select a location, the details for that location are added to this section. You can type in additional details if available.
 9. In the **Contact Information** section, search for a location or select  to select the location from a map. When you select a location, the details for the contact for that location are added to this section. You can type in additional details if available.
 10. Select **Create**.

Log & History pane

Use the **Log & History** pane to view history related to new issues and status changes and to add a log entry.

To add a log entry, complete the following steps:

1. Expand the **Log & History** pane.
2. Select .
3. In the **New Entry** field, enter the log entry.
4. Select **Add**.

Description & Resolution pane

Use the **Description & Resolution** pane to add, change, or view a description of the resolution to the CRM issue. The left area of the pane contains the public description that appears on your eTRAKiT public website. The right area of the pane contains the resolution description for agency use only.

To view the description and resolution, expand the **Description & Resolution** pane.

To add the resolution, expand the **Description & Resolution** pane, select **Edit**, enter the description and resolution, and then select **Save**.

To change the resolution, expand the **Description & Resolution** pane, select **Edit**, modify the description and resolution, and then select **Save**.

Linking an issue to a Land Management record

To link an issue to a Land Management record, complete the following steps:

1. Locate the CRM record.
2. Expand the main information pane.
3. In either the **Location Details** or **Contact Details** area, point to the functions menu and then select **Link to Land Management**.
4. Search for the Land Management location by entering the address of either the issue location or complainant location and then selecting **Go**.
5. Select the link in the **Record #** column to select the Land Management record you want to link to.

Reports

Community Development includes many standard reports that you can produce using Community Development reporting or CentralSquare Analytics. Reports in Community Development are dynamic, enabling you to select and change parameter values to change the reported records. Reports are organized by activity or application.

Additionally, you can create custom reports using SQL Server Reporting Services (SSRS).

To access reports, point to **Favorites** and then select **Reports**. Alternatively, if you use CentralSquare Analytics, point to **Favorites** and then select **Cognos Reports**.

Notes:

Before you can access the Reports feature, you must add **Reports** to your **Favorites** list.

Before you can access the Cognos Reports feature, you must be set up as a Cognos user and you must add **Cognos Reports** to your **Favorites** list.

For more information about adding features to your **Favorites** list, see [Favorites](#).

Whether you use the Reports feature or the Cognos Reports feature, the process is similar: access the reports list, select a report, set search parameters, and select a report format. Refer to the following sections for more details:

- [Using Community Development reporting](#)
- [Using CentralSquare Analytics](#)
- [Reports List](#)

Using Community Development reporting

When you use the Reports feature, you select the report to produce and the applicable parameters. The report appears in a separate browser tab or window. From the browser, you can navigate through the report and use tools to complete other actions such as finding a specific word or exporting the report to a different format.

Note: Before you can access reports, you must add Reports to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

Producing reports

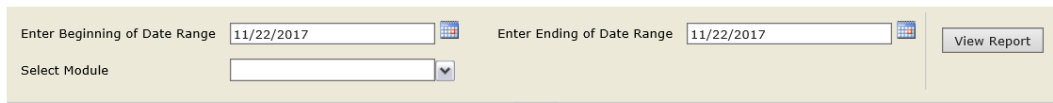

To produce a report, access Reports from your **Favorites** list and then complete the following steps:

Note: For details about using Cognos to produce Community Development reports, see [Using CentralSquare Analytics](#).

1. Point to **Favorites** and then select **Reports**.
2. Expand the category for the report you want to produce.
3. Select the report.

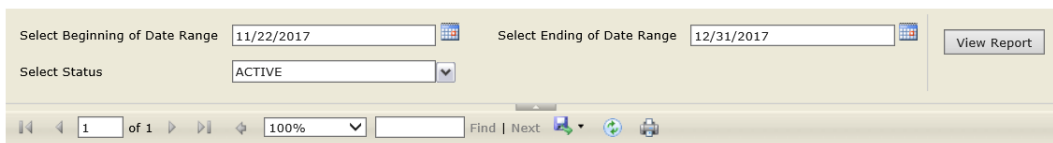

Tip: Select **Add to Favorites** to add the selected report to your **Favorites** list.

4. Select **Create**. A separate browser tab opens and displays either the report or parameter selections:
 - If the report does not require parameter selections, the report appears. Skip the remaining steps in this procedure.
 - If the report requires parameter selections, the fields appear so you can select parameter values. Complete the remaining steps to select parameter values and generate the report.
5. Select the parameter values. Parameters vary by report.

Enter Beginning of Date Range  Enter Ending of Date Range 

Select Module

6. Select **View Report**. The report appears in the current window below the parameters.

Select Beginning of Date Range  Select Ending of Date Range 

Select Status

1 of 1 100% Find | Next





 Contractors About to Expire City of Pacific Shores Date Range Between 11/22/2017 and 12/31/2017				
CONTRACTOR	TYPE SUBTYPE	EXPIRATION DATE ISSUE DATE	COMPANY ADDRESS	OWNER NAME OWNER ADDRESS
0000	CONTRACTOR	12/31/2017	JOE SMITH 2036 CORTE DEL NOGAL CARLSBAD CA 92011	
	ACTIVE			
11112	ARCHITECT	12/31/2017	ACME ENGINEERING 1100 WATER ST. SANTA CRUZ CA 95062	
	ACTIVE			
631972		11/30/2017 11/14/1991	ACME CONSTRUCTION INC TRES PINOS CA 95075	SMITH JOE 275 S 14TH ST SAN JOSE, CA 95112
	ACTIVE			

Navigating in reports

Use the toolbar to scroll through a long report. The following navigation tools are available:











Select to view the first page of the report.

-  Select to view the previous page of the report.
- of 1 Enter the page number and then press Enter to go to a specific page of the report.
-  Select to view the next page of the report.
-  Select to view the last page of the report.
-  Select to view the parent report.

Additional tools

The toolbar includes the following additional tools:

-  Enter a magnification setting to view the report larger or smaller.
- Find | Next Enter a word or phrase you want to search for and then select **Find**. Select **Next** to scroll through the search results.
-  Select to hide or show the report parameters.
-  Select to export the report data to another file format. Select the file type from the list. Community Development generates the report in the specified format and opens the file.
-  Select to refresh the report data using the same parameters.
- Note:** To generate the report using different parameters, change the parameters and then select **View Report**.
-  Select to print the report.

You can sort the report by any report heading. Select  in the column header to sort by that column.  indicates the sort is ascending.  indicates the sort is descending. Select the arrow to change the sort order.

Using CentralSquare Analytics

When you use CentralSquare Analytics/Cognos reporting, you select the report to produce, the applicable parameters, and the format for the report. Depending on the format you select, the report is downloaded or appears in a separate browser tab.

Note: Before you can access reports using Cognos, you must be set up as a Cognos user and you must add Cognos Reports to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

You must be signed in to Cognos to produce reports. If you are not signed in, the **Cognos Authentication** dialog box appears when you try to access the Cognos Reports feature. Enter your Cognos user ID and password and then select **Sign In**. The **Cognos** dialog box appears and you can work with reports.

Producing reports with Cognos

To produce a Community Development report using Cognos, complete the following steps:

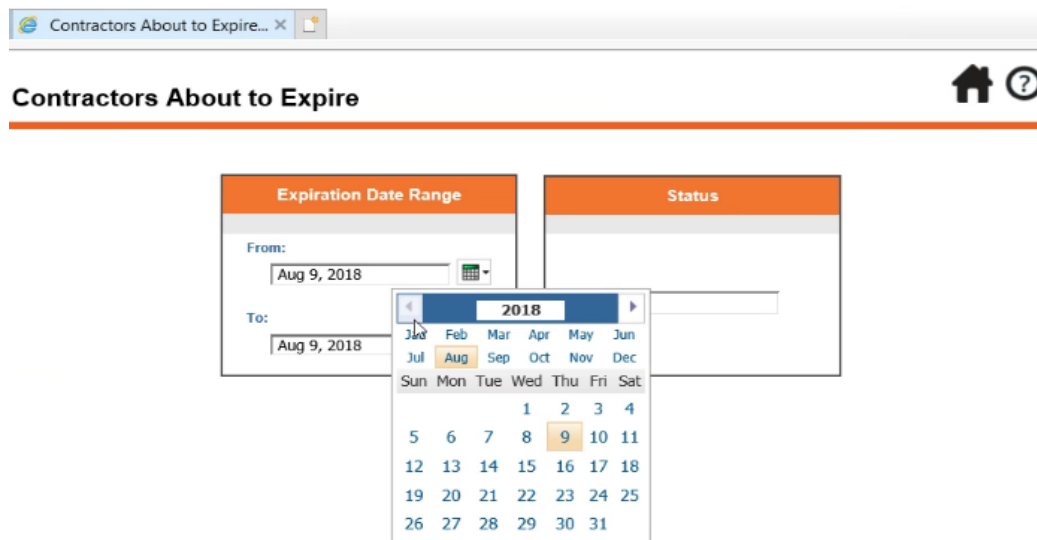
1. Point to **Favorites** and select **Cognos Reports**.
2. Log in to Cognos if you are not already logged in.
3. In the **Cognos** dialog box, select the report you want to produce.

The result depends on whether the selected report requires parameter selections:

- If the selected report does not require parameter selections, the report opens in HTML format in the IBM Cognos Viewer in a separate browser tab. Skip the remaining steps in this procedure.
- If the selected report requires parameter selections, a separate browser tab opens and displays parameter options for the report. The new browser tab also includes the following buttons:
 - 🏠 Select the home button to close the report tab and return to Community Development.
 - ❓ Select the help button to open a report-specific help document.

Complete the remaining steps in this procedure to select parameter values and generate the report.

4. Select the parameter values. Parameters vary by report.



5. Select an output type. Available formats are PDF, XLSX, CSV, or HTML. The default format is HTML. When you select a format, the **Run As** button changes to indicate the selected format. For example, if you select **PDF**, the button changes to **Run As PDF**. Format buttons appear for formats that are not selected.



6. Select **Run As**. Depending on the output type you selected, the report is downloaded or opens in the IBM Cognos Viewer in the browser.

For details about the options available in the IBM Cognos Viewer, refer to Cognos documentation.

Reports List

Community Development includes multiple reports, which can be produced using Community Development Reports or CentralSquare Analytics.

AEC

- All Contractors
- All Contractors - Mailing Labels
- Contractors About to Expire
- Contractors History Report
- Contractors Unpaid Fees
- Contractors with Permits Issued
- Contractors with Selected Subtypes
- Contractors with Selected Types

Bonds

- Bonds Expiring but not Released

Charts

- Fees Paid by Month
- Inspections Completed or Requested by Inspector
- Permit Applied for by Type
- Permit Issued for by Type
- Project Applied for by Type
- Project Approved for by Type

Code Compliance

- Active Cases
- Active Cases by Officer

-
- Cases Closed by Officer
 - Cases Closed by Type
 - Cases Opened by Officer
 - Cases Opened by Type
 - Cases Opened by Type and Officer
 - Cases Opened by Type Summary
 - Cases to be Followed Up
 - Chronology by Case and Action Type
 - Chronology by Officer and Action Type
 - Closed Cases by Duration and Type
 - Violation by Case Number
 - Violation by Violation Type

CRM

- Advance Issue Query
- All Issues - Address
- All Issues - Complainant
- All Issues Closed - Prefix
- All Issues Opened
- All Issues Opened by Type Subtype and Prefix
- All Outstanding Issues by User

Financial

- Account Activity by Module
- Account Activity for Permits
- Account Activity Summary
- Account Activity Summary Excluding Refunds
- Detailed Payments
- Fees Paid by Module by Account
- Outstanding Case Fees
- Outstanding License Fees
- Outstanding Permit Fees

-
- Outstanding Project Fees
 - Payments by Account and Prefix
 - Payments by Account by Module
 - Payments by Cashier
 - Payments by Cashier Excluding Refunds
 - Payments by Pay Method
 - Payments by Receipt Number
 - Payments by Record Number
 - Permit Payments of Selected Fee
 - Refunds by Date
 - Summary of Case Fees Paid by Account
 - Summary of Permit Fees Paid by Account
 - Summary of Project Fees Paid by Account

Geo

- GeoTRAK Update Activity Log

Inspections

- All Inspections Not Yet Completed
- Average Inspection Duration
- Average Inspection Duration - Inspector
- Inspection Activity-History Report
- Inspection Result Log
- Inspection Results by Inspection Type
- Inspection Totals by Inspector
- Inspection Totals Completed by Type
- Inspections Not Yet Completed
- Inspections Requested
- Inspections Requested (Sort)
- Inspections Requested by Inspector

License

- Active Licenses
- Active Licenses by Type

Permit

- CA SMIP Commercial Summary
- CA SMIP Residential Summary
- Outstanding Permit Reviews
- Permit Routing Report - Selected Contacts
- Permit Routing Report - Selected Review Types
- Permits About to Expire
- Permits About to Expire - Type
- Permits Applied
- Permits Applied But NOT Approved
- Permits Applied with Aging
- Permits Approved But NOT Issued
- Permits Expiring But NOT Finaled
- Permits Finaled
- Permits Finaled with Fees and Values
- Permits Issued
- Permits Issued - Additional Info
- Permits Issued - Prefix
- Permits Issued - Status
- Permits Issued - Summary by Type
- Permits Issued - Summary by Values
- Permits Issued But NOT Yet Finaled or Expired
- Permits Issued with Contacts
- Permits Issued with Fees and Values
- Permits Issued with Fees Values and Addresses

Plan Locations

- Plan Location Assigned but Finaled
- Plan Location by Address
- Plan Location by Location Number

Project

- All Inactive Projects
- Outstanding Project Reviews
- Parent and Sub Projects
- Project Detail by Planner Status Date
- Project Routing Report
- Projects About to Expire
- Projects Approved
- Projects Approved by Prefix
- Projects Approved by Status
- Projects by Planner and Status
- Projects by Status and Date
- Projects by Type and Date
- Projects by Type and Status
- Projects by Type Status and Date
- Projects with Chronology Actions
- Projects with Selected Action Type
- Projects with Selected Action Type - Detail

System

- Activity Summary
- All User Privileges
- Fee Audit History
- Fee Schedule Report
- Inspection Schedule Report
- Type More Info Setup Report

- Type Setup Report
- User Name Report

Time Tracker

- All Postable Hours by User Name
- Billable Hours by Record Number
- Billable Hours by User Name
- Timesheet Overview by Record Number
- Timesheet Overview by User Name

Supporting features and functions

The following features and functions support multiple modules and pages in Community Development:

- [Restrictions](#)
- [Time Tracker](#)
- [Trust accounts](#)
- [Internet Links and Imaging features](#)

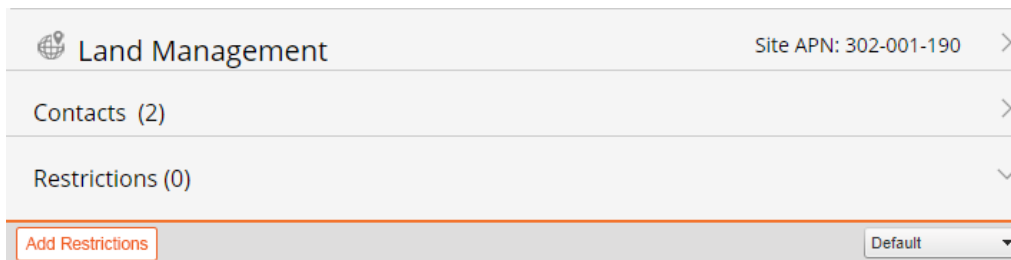
Restrictions

The Restrictions function flags essential property information in multiple Community Development applications. This feature enables other departments to view important information (such as whether a property is in a flood zone, on a fault line, or in a historical district) before issuing a permit, project, case, or license. Restrictions can be configured by the system administrator to display either single or multiple restrictions.

Adding restrictions to a property record

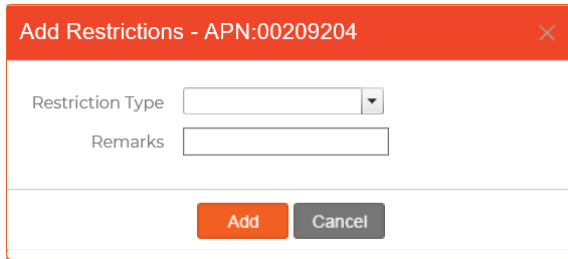
To add a restriction to a property record, complete the following steps:

1. Locate the property in Land Management.
2. Expand the **Restrictions** pane.
3. Select **Add Restrictions**.



The screenshot shows a web interface for Land Management. At the top, there's a header bar with a globe icon, the text "Land Management", and "Site APN: 302-001-190" with a right arrow. Below this is a sidebar with three items: "Contacts (2)" with a right arrow, and "Restrictions (0)" with a downward arrow. At the bottom of the sidebar, there's a red-bordered button labeled "Add Restrictions" and a dropdown menu labeled "Default".

4. Select the restriction type.
5. Enter remarks.



Add Restrictions - APN:00209204 [X]

Restriction Type

Remarks

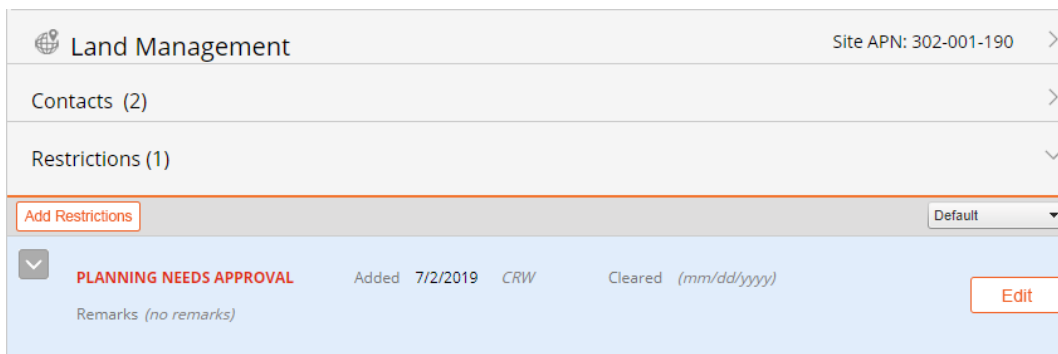
Add **Cancel**

6. Select **Add**.

Editing restrictions on a property record

To change restrictions on a property record, complete the following steps:

1. Locate the property in Land Management.
2. Expand the **Restrictions** pane.
3. Select **Edit** next to the restriction.



Land Management Site APN: 302-001-190 >

Contacts (2) >

Restrictions (1) v

Add Restrictions Default v

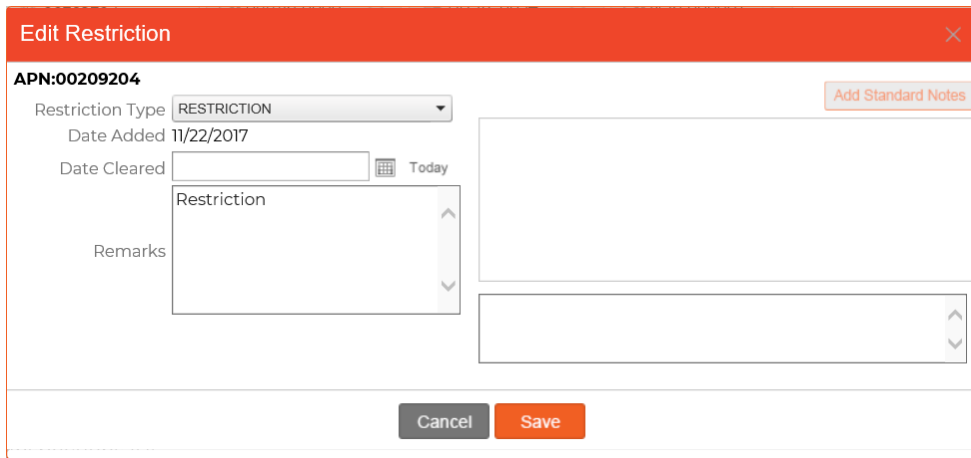
<input checked="" type="checkbox"/>	PLANNING NEEDS APPROVAL	Added 7/2/2019 CRW	Cleared (mm/dd/yyyy)	Edit
Remarks (no remarks)				

4. Update the following fields:


- **Restriction Type:** Select a restriction type.

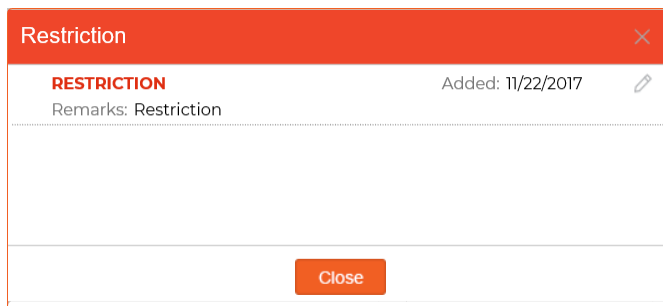
Note: The date the restriction was added appears but cannot be changed.

- **Date Cleared:** To remove the restriction from all attached activity records, enter a date. The restriction remains on the Land Management record, but it is not visible from the related activity records. To keep the restriction visible on related records, leave this field blank.
- **Remarks:** Add or change remarks related to the restriction.
- **Notes:** Add notes related to the restriction. You can add standard notes, custom notes, or both.




5. Select **Save**.

A restrictions indicator  appears on the Land Management main information pane and on any permit, project, code case, license, and issue records that are linked to the property record. In addition, a message appears when you open a record that is linked to a Land Management record with restrictions.



Viewing restrictions

When you open a record that is linked to a Land Management record with restrictions, a message appears listing the restrictions. Select **Close** to close the message window.

While working in the activity record, you can view restrictions on a property at any time by selecting  on the record's information pane. A message appears listing the restrictions. Select **Close** to close the message window.

Removing restrictions

You can remove restrictions by:

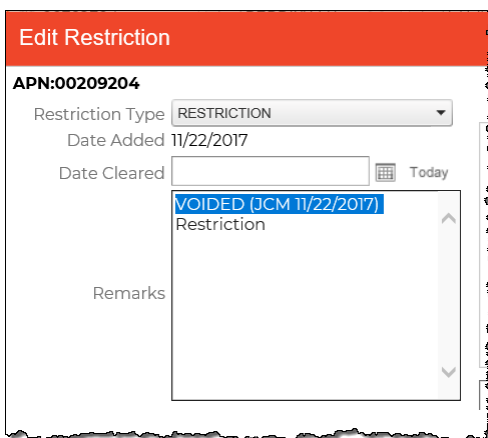
- Clearing the restriction. The restriction remains on the Land Management record, but it is not visible from the related activity records. Use the **Edit** function to clear a restriction. For more details, see [Editing restrictions on a property record](#).

- Voiding a restriction. The restriction remains on the Land Management record, but it is not visible from the related activity records.

Users who do not have the CAN DELETE RESTRICTIONS privilege can void restrictions but not delete them. Only system administrators or users with the CAN DELETE RESTRICTIONS privilege can delete restrictions.

To void a restriction, point to the functions menu in the **Restrictions** pane and select **Void Restriction**. Select **Yes** to confirm.

To remove the void indicator, edit the restriction and remove the line in **Remarks** that shows the restriction was voided.



- Deleting a restriction. The restriction is removed from the Land Management record.

Only system administrators or users with the CAN DELETE RESTRICTIONS privilege can delete restrictions. A restriction must be voided before it can be deleted.

To delete a restriction, point to the functions menu in the **Restrictions** pane and select **Delete Restriction**. Select **Yes** to confirm.

Time Tracker

Time Tracker provides the capability to record the amount of time spent on a review, inspection, or activity and assess a fee based on the user's established rate for that activity.

The Time Tracker process includes:

1. [Entering time](#) for an activity.
2. [Validating recorded entries](#).
3. [Posting activities](#).

Entering time

Only one Time Tracker entry is allowed per activity.

To enter time for an activity, complete the following steps:

1. Locate the activity and the inspection, review, or chronology item you want to add time to.
2. Select **Edit** in the row for the inspection, review, or chronology item.
3. In the **Add to Timesheet** field, enter the amount of accumulated time spent on the activity (for example, 1, 1.25, 2.5, or 8). Enter numeric values with no more than two decimal places.
4. Select **Save**.

Validating time entries

To validate recorded entries, use the Timesheet feature. Complete the following steps:

1. Point to **Favorites** and select **Timesheet**.

Note: Before you can access Timesheet, you must add Timesheet to your **Favorites** list. For more information about adding features to your **Favorites** list, see [Favorites](#).

2. Select the week you want to view. The default setting is the current week.
3. Review the entries.
4. Add comments to each entry, if needed.
5. Add entries, if needed. To add an entry:
 - a. Select **Add Time**.
 - b. Search for the record. In the search results, select the link in the **Record #** column.
 - c. Select the task.
 - d. Select the date.
 - e. Enter the time spent on the activity, in hours.
 - f. Enter comments.
6. Verify that each entry is correct.

You cannot modify an existing entry. Instead, delete the entry and add it again to your timesheet.

Record #	Task	Activity Type	Date	Hours	Posted	Comments
X BRES2012-00131	CHRONOLOGY		11/22/2017	0.25		

Weekly Total: 0.25

7. Select **Save**.

Posting time entries

To post time entries, use the Timesheet feature. In the **Timesheet** dialog box, select **Post**.

Users can post their own timesheet only. System administrators can post timesheets for all user accounts.

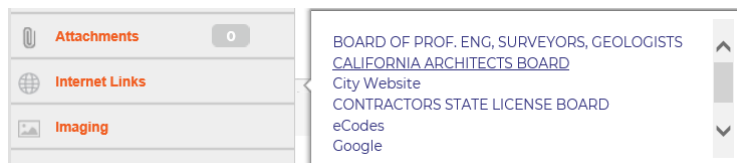
Internet Links and Imaging features

Links to frequently used websites such as contractor licensing, building codes, state or county ordinances, or document imaging systems can be accessed directly from Community Development by selecting **Internet Links** or **Imaging**. Default agency web links must be set up by a system administrator. Users can define their own favorite unique web links.

To access internet links, select **Internet Links** in the **Relationships** pane.

To access imaging links, select **Imaging** in the **Relationships** pane.

The pop-up window includes default agency web links and user-defined web links.



Select a link to open the website in a new browser tab.

Tip: The Imaging feature allows access to web-enabled Document Imaging Systems (for example, Laserfiche).

Glossary

A

AEC

architect, engineer, contractor; also known as a contact or entity

API

application programming interface

APN

Assessor Parcel Number, used by the county tax assessor to identify a parcel of land.

autogen

automatically generated

autogen number

Unique, numerical identifier that is automatically generated for tracking purposes (for example, receipt numbers, permit numbers, citation numbers).

C

CRM

Citizen Response Management

G

geo

geographic

GIS

geographic information system

I

IVR

interactive voice response

R

REST

representational state transfer

S

standard notes

Predefined list of frequently used comments for inspections and reviews that can speed up data entry. Standard notes are configured in the Reviews and Inspections control tables and used in the Notes function for reviews and inspections in Community Development applications.

standard remarks

List of standard comments from which a user can select one when batch-scheduling reviews or inspections. They are configured in the Reviews and Inspections control tables.

T

trust account

Deposited funds that are held by the agency on behalf of someone doing business with the agency (for example, a contractor). The depositor can draw on these funds to pay fees assessed on activities in the Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management modules.

W

WUM

Web Utilities & Maintenance