BAS CLERKS

License Renewals & Forms

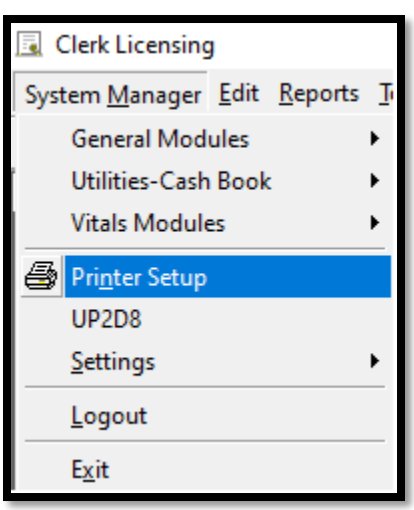
A comprehensive review and training of how to align forms, set margins and edit data with the Clerk program. We will also explore how to update expiration dates with the Dog module.

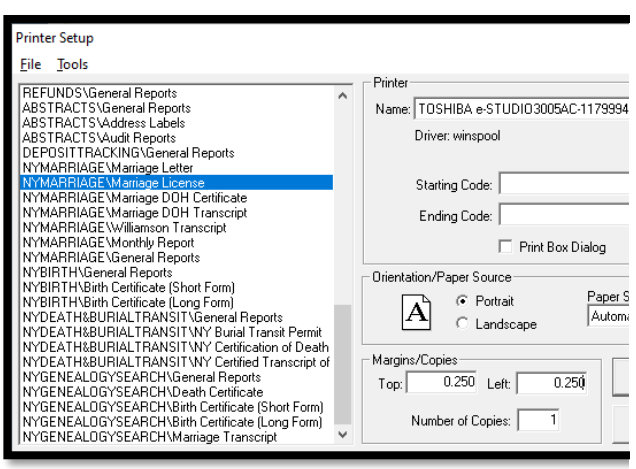
State License Form editing and alignment

Marriage/Birth/Death License & Certificate alignment

There will be times when the Marriage, Birth & Death Licenses and/or Certificates may need to be aligned. Some examples of when you might need to adjust the printing are when the state makes changes to the forms, or you when receive new copies from the state.

To adjust the alignment of a license or certificate, first you will need to locate the form within the Printer Setup. To Access the Printer Setup, you will need to go to the System Manager > Settings > Printer Setup.





Once you are in the Printer Setup, you will need to choose from the list of printable options in the list on the left. The Marriage, Death and Birth will be labeled as:

- NYMARRIAGE
- NYBIRTH
- NYDEATHBURIAL

When you click one time on an item on the left, the right-hand side of the Printer Setup window will default with the current settings for that item. In the section titled "Margins/Copies" is where you can adjust the Top and Left margin. A trick to remember is that the higher the number you enter, that margin will increase, and the lower the number, the closer to that margin the print will be.

Adjusting the margin settings in lower increments is highly suggested. It may take several attempts to hit your mark!

We always suggest testing any edits to the margins by printing on plain paper before testing on the pre-printed forms. When you print on the plain paper, you can hold the plain paper test up to an actual state form to check for alignment. Always steer away from making photocopies of the forms to run tests on as the copies are never a 100% duplicate of the original.

RTF License Form and Editing

Dog Letters/Misc. Cash/General Licensing/Marriage Letters

Within the Clerk Licensing application, there are several letters and forms that can be edited. The letters and forms are in a file format called a Rich Text Format (rft). Rich Text Format forms and letters can be edited and can pull most data from various parts of the program. For example, the Delinquent Dog Letter can pull dog license information and owner information to 'mail merge' specific license information.

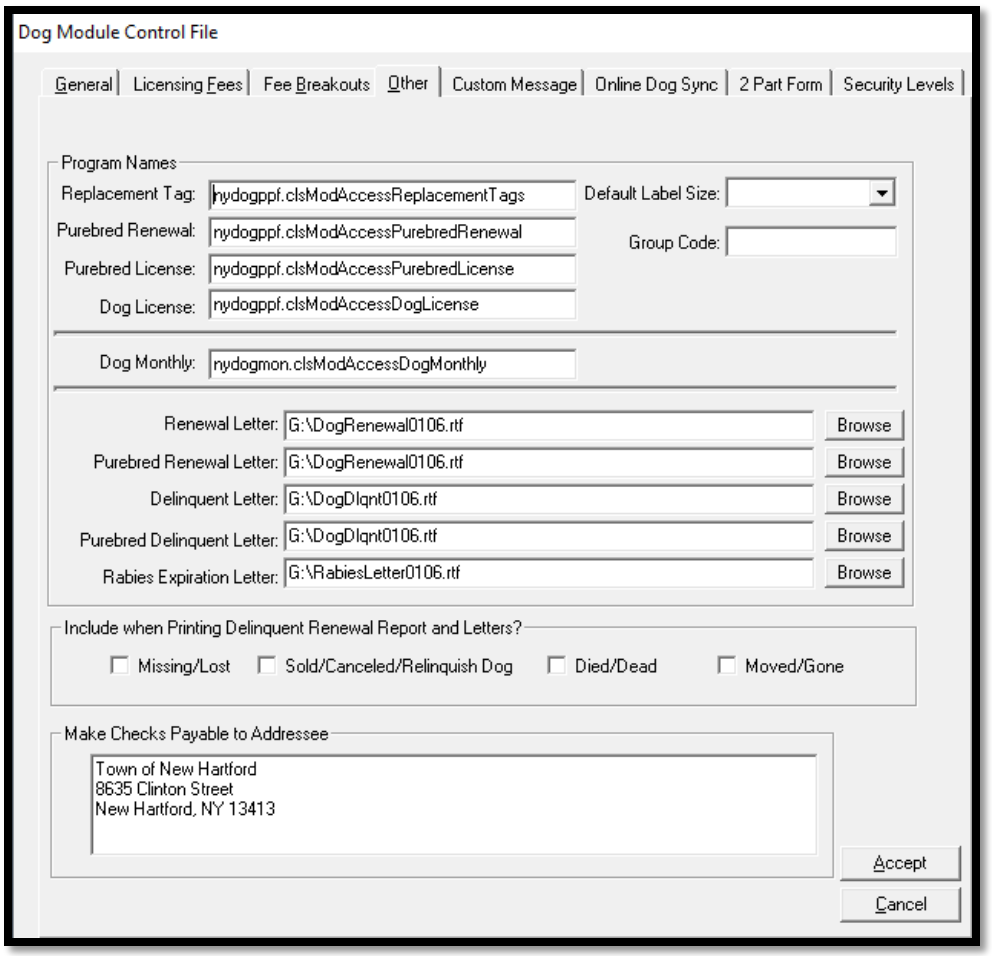
When attempting to edit one of the letters or forms, the user must first locate where that specific letter or form is pulling from. Depending on the module, the forms and location of those forms may differ. Listed below will be some example of what forms we can edit and where we can locate those forms.

Dog License Module – Dog Renewal/Delinquent Letters

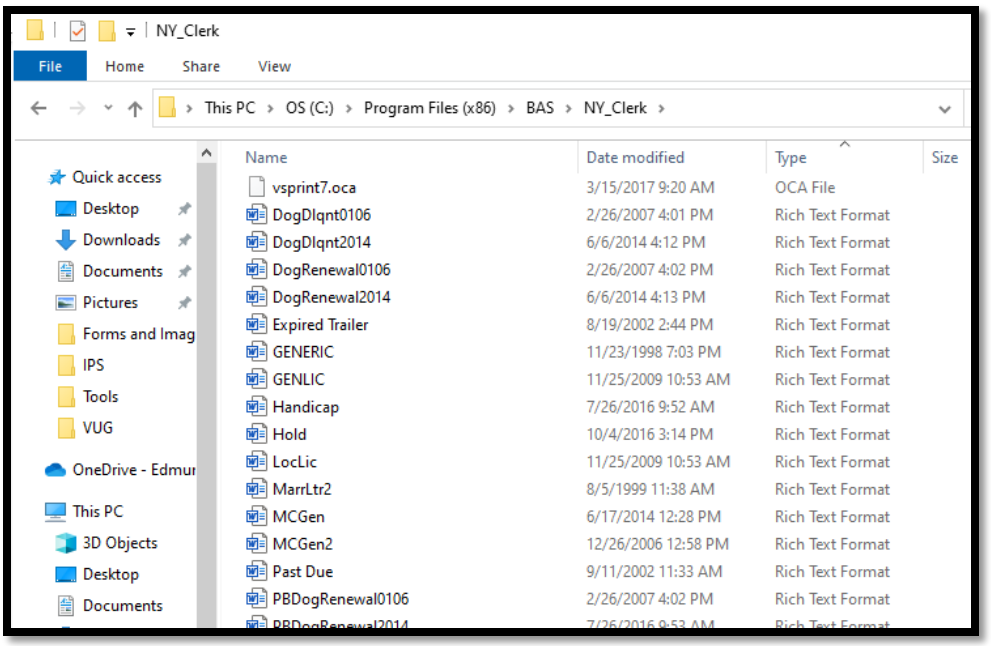
The file path location of the Dog Renewal and Delinquent Letters are in the Dog License Module Control. You can access this by going up to System Manager > Settings > Module Control File. Once in the Dog Module Control File, you will see several tabs along the top of the window. Locate the tab labeled "Other" and click on that tab. You will see the section where there is a list of options for the following:

- Renewal Letter
- Purebred Renewal Letter
- Delinquent Letter
- Purebred Delinquent Letter
- Rabies Expired Letter

Each line item will provide the file path to locate that letter. You can open an explorer window and copy that path to locate the letter you would like to edit.



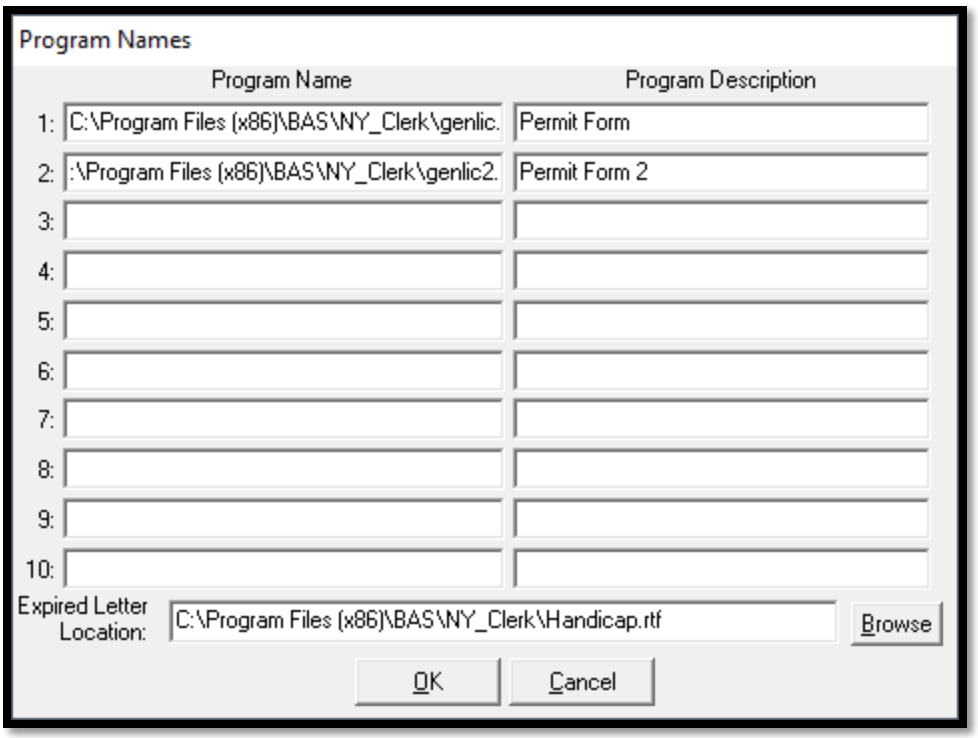
The files will have the file description listed as a Rich Text Format and you could possibly see the file extension as .rtf depending on your settings. You will need to locate the file you would like to edit, right click on the file, and choose Open With. You will want to choose to edit with Word Pad. When the file opens in WordPad, you will be able to make edits to any hard labels or adjust the formatting. You will notice the data fields as they will have be show as <<data>>… if you need a list of the data fields available per module, we can produce a list for you.



Once you make the desired changes to the forms, you can save the changes and close out of the .rtf WordPad editor and close out of the explorer window. You can verify your edits by running the Dog License Renewal/Delinquent Letters from the Reports menu.

Miscellaneous Cash & General Licensing Forms

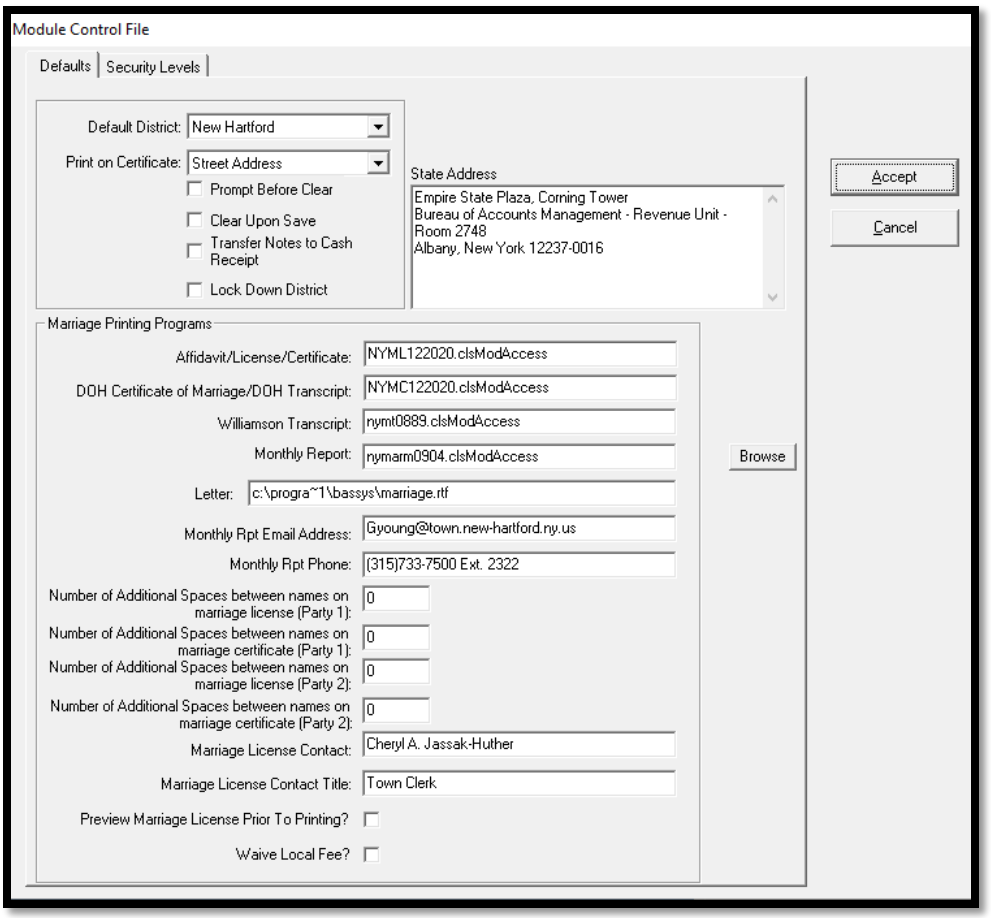
The Miscellaneous Cash and General Licensing modules both allow for letters, forms and permits to be printed for specific Transaction/License types. Custom letters, forms and permits must be first created and then linked to the Transaction Type by going to the Tools > Lookup Files > Transaction/License Type. You will need to locate the Transaction/License Type from the list on the left and then click the button on the bottom of the window labeled 'Prgm Names'. In the Program Names window, each Transaction/License Type can list out up to 10 different forms and one Expired Letter. The .rtf forms will need to be created and saved separately. Once the form is saved, you can add the file path to the section Program Name and the Description will be what displays when you click the Print Button on a transaction. Once the form is linked to the Transaction Type, when a transaction is completed, the print options will display the list of the forms to choose from.



Marriage Licensing Letter

A nice feature of the Marriage Licensing Module is the ability to print a congratulatory letter to send along to the newlyweds. Some clerks like to print this letter along with the Certificate of Marriage. The Marriage Letter can be edited just as the other .rtf forms in the system.

To locate the Marriage Letter path, you will need to go to System Manager > Settings > Marriage Module Control File. When you open the Marriage Module Control File, there is a section in the Marriage Printing Programs called 'Letter'.



This line item will provide the file path to locate that letter. You can open an explorer window and copy that path to locate the letter you would like to edit.

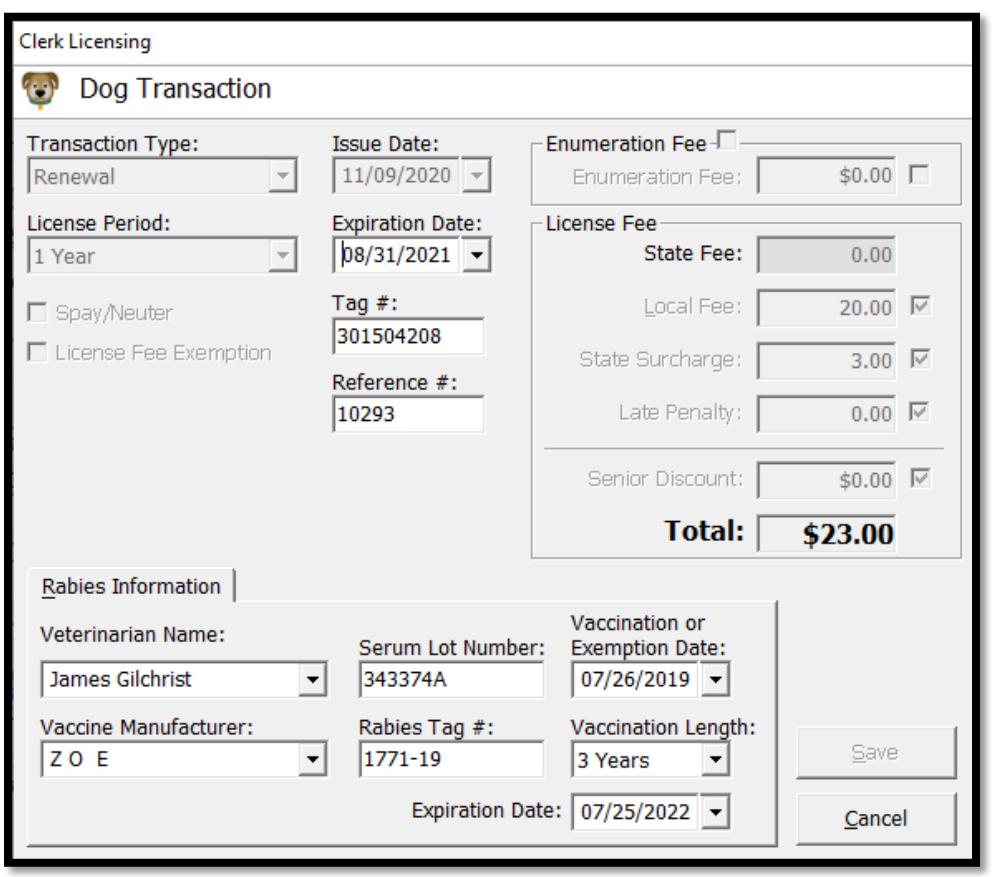
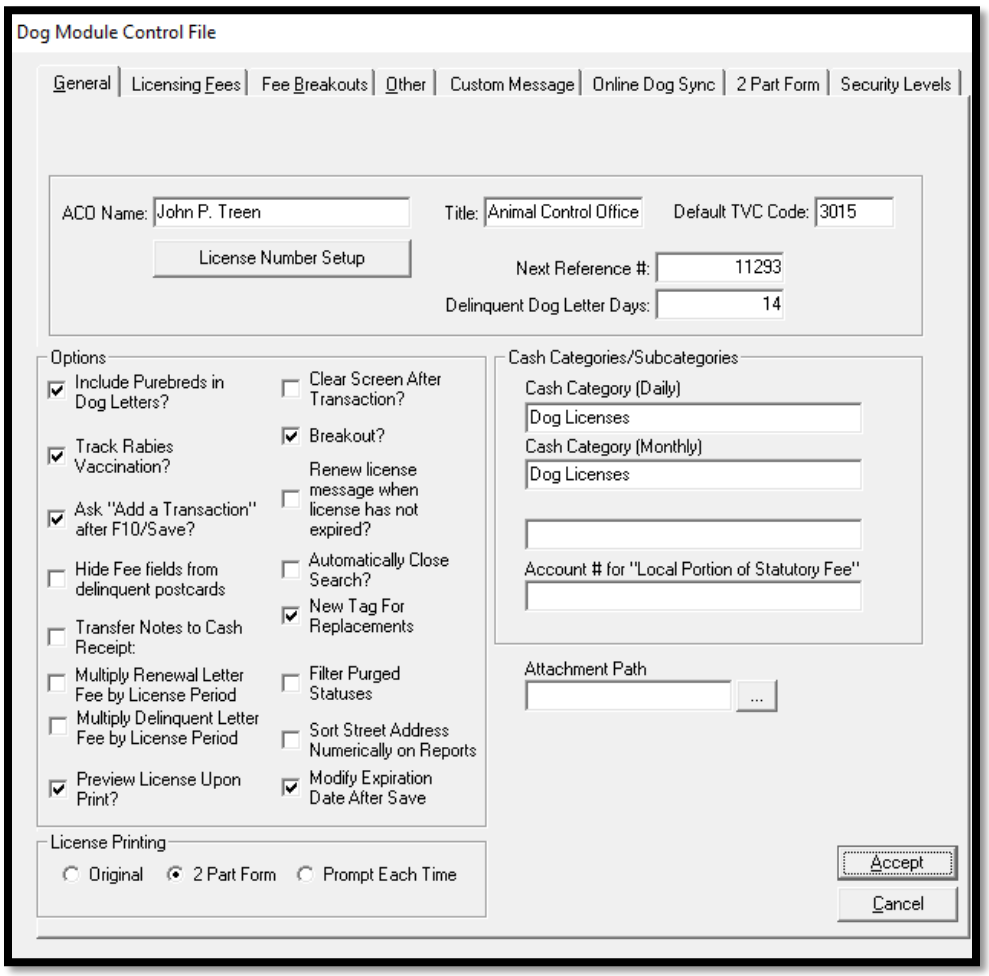
The file will have the file description listed as a Rich Text Format and you could possibly see the file extension as .rtf depending on your settings. You will need to locate the file you would like to edit, right click on the file, and choose Open With. You will want to choose to edit with Word Pad. When the file opens in WordPad, you will be able to make edits to any hard labels or adjust the formatting. You will notice the data fields as they will have be show as <<data>>… if you need a list of the data fields available per module, we can produce a list for you.

Once you make the desired changes to the forms, you can save the changes and close out of the .rtf WordPad editor and close out of the explorer window. You can verify your edits by calling up an existing marriage license, clicking the Print Button and choosing the Marriage Letter.

Dog License Renewal Expiration Dates

How to edit Dog License Renewal Expiration Dates

When processing a Dog License Renewal, the Expiration Date can be edited at that time. When you are on the Dog License Transaction screen, if you need to make any edits to the Expiration, you can simply click in the associated date field or use the calendar dropdown to make the edits. If you need to make an edit to an existing saved transaction, there is a switch in the Dog Module Control file to allow for edits to the Expiration Date after the record is saved.



To turn on this feature, you can go to the System Manager > Settings > Dog Module Control File. On the General Tab, in the lower section labeled 'Options' there is a switch for Modify Expiration After Save. Once this is turned on, you can call up an existing Dog License Transaction, double click on the record in the lower history section and make the desired edit to the Dog License Expiration Date. This will update the record information on the main dog license as well.