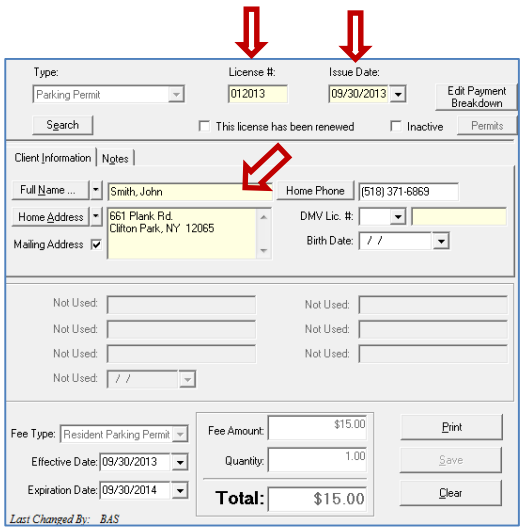
BAS Monthly Tip Sheet

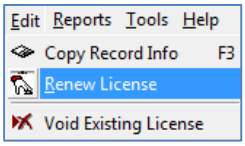
☑ General Licensing Renewals

The General Licensing Module offers users the ability to renew licenses for the upcoming period. Renewing licenses not only allows users to easily update their records but also track the existing and past licenses of the applicant.

To Renew a License:



1. Search for the current license:
   a. Use the **License #**, **Issue Date** or **Name** fields along with the page up or page down keys to search for records.
2. Verify the correct license has been pulled up
3. Open the **Edit** menu and select **Renew License**



4. A new license will be created. The new license will include:
   a. The original contact information
   b. The correct license type
   c. The fee type (this feature must be turned on)
   d. The license number (this feature must be turned on)
5. Update any applicable information (e.g. contact, fees, license number, etc.)
6. Click **Save** to complete the process

The new license will be saved into the system with all updated information. The old license will be marked as being renewed.

The new and old records will be marked with a blue **Permits** button. Clicking the **Permits** button will display all licenses associated to that applicant.

WARNING: Users should **NEVER** manually select the **"This license has been renewed"** box. **This checkbox removes the license from the renewal mailings** and will check automatically when the process is completed following the steps above. Users should **uncheck this box only if the new license has been voided**, thus requiring the applicant to renew a second time. A BAS Representative should be contacted if you have questions regarding the use of this checkbox arise.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

December 2014

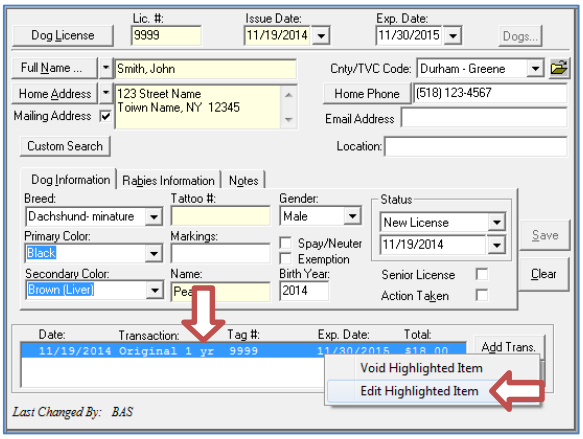
BAS Monthly Tip Sheet

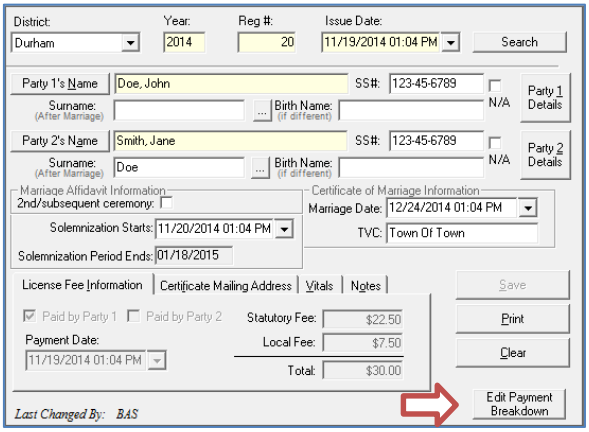
☑ *How to Add/Edit Payment Types*

In the BAS Clerk program, users have the ability to add or edit the payment breakdowns:

Editing Transactions in ***Dog Module*:**

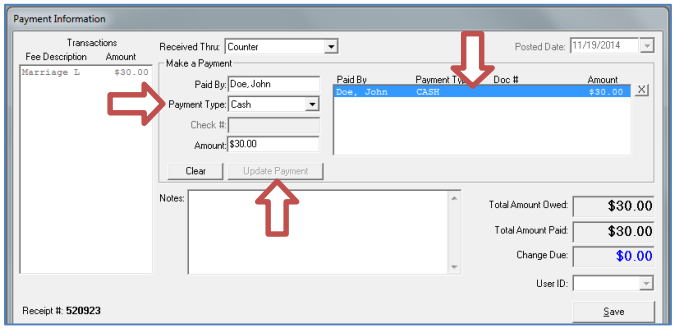
- Search for the dog license to be edited
- Highlight a transaction
- **Right Click** on the highlighted transaction
- Select **Edit Highlighted Item**
- Edit the payment information





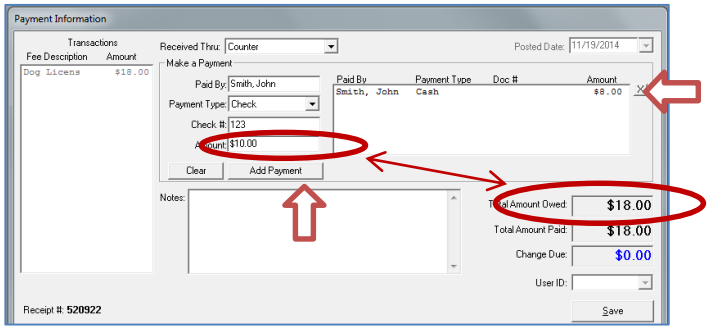
Editing Transactions in all ***Other Modules*:**

- Search for the record to be edited
- In the right corner click **"Edit Payment Breakdown"**
- Edit the payment information



Editing a **Payment Type:**

- Select the payment to be updated
- Enter the payment information
- Click **Update Payment**
- Click **Save**



Adding a **Split Payment:**

- Add the first amount with the corresponding **Payment Type** and click **Add Payment**
- You will see that there is now a difference in the Amount vs Total Amount Owed
- Select the appropriate **Payment Type** for the remaining balance and click **Add Payment**
- Click **Save**

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

BAS Monthly Tip Sheet

☑ Handling Voids In The Decals Module

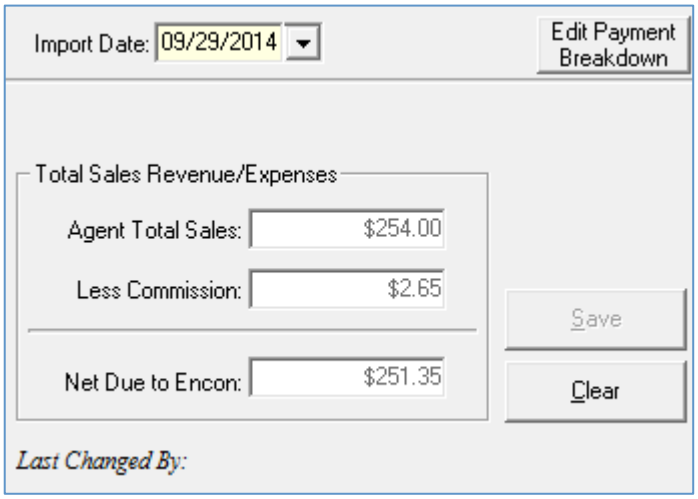
Sometimes it is necessary to void a decals entry. Maybe something was mistyped or maybe additional fees were collected.

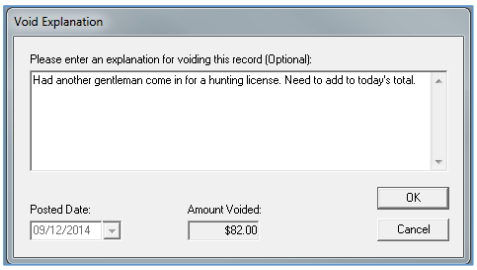
To Void an Entry:

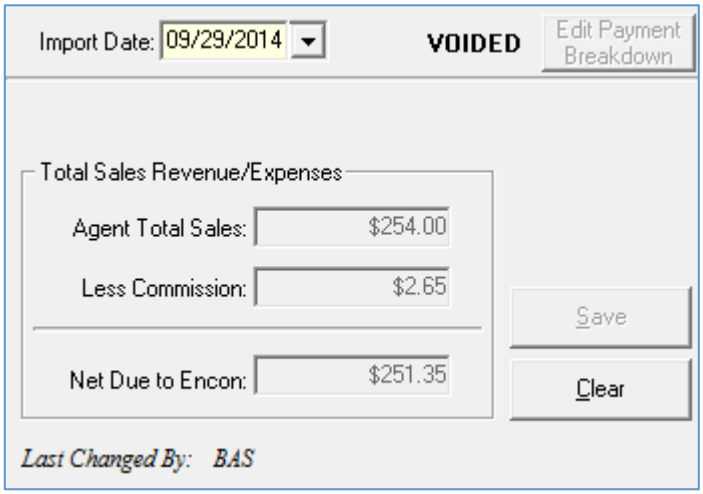
1. Begin by locating the entry to be voided.
   a. Do this by entering the date of the decals entry into *Import Date* field and pressing the page down key on the keyboard.
2. Verify that the record which appears is the one to be voided.
3. Once the record is found go to:

   Edit → Void Existing License

4. Users can enter an explanation for the void or skip it by just clicking *OK*.
5. The record is now voided.
6. Re-enter the transaction with the correct information.







To Locate a Void:

1. Enter the date of the void and press the page down key on keyboard.
2. The record may not appear the first time the page down is pressed, if not press the key a second time.
3. The voided record will appear.

Note: If a voided decals record was later re-entered with the same date as the original, then both records will exist for that date and both records will be searched using the Import Date field and page down key.

4. The voided entry will also display on the Daily Cash report when run to include voids on the date of the original transaction.

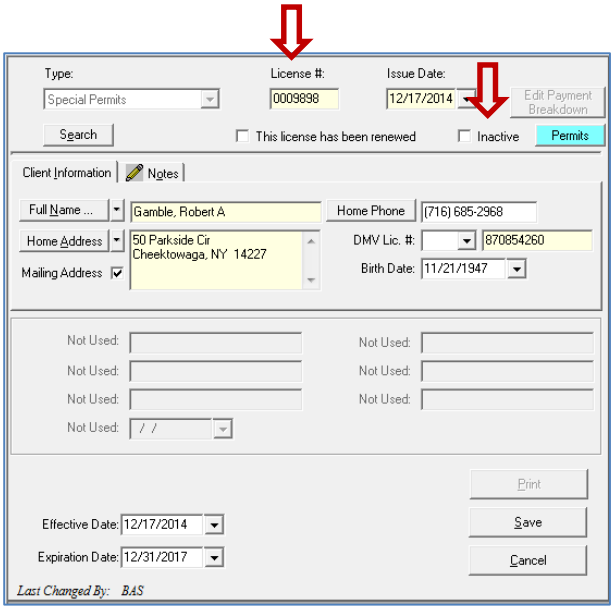
If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your

BAS Monthly Tip Sheet

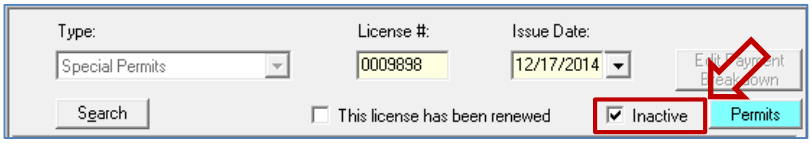
☑ General Licensing – Inactivating Licenses

The General Licensing Module offers the ability to mark licenses as inactive. Inactive licenses generally occur when someone has moved away, lost a license or is deceased.

To Mark a License Inactive:

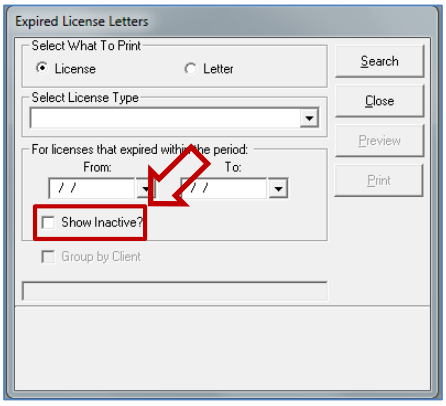


1. Search for the current license:
    - Use the **License #**, **Issue Date** or **Name** fields along with the page up or page down keys to search for records.
2. Verify the correct license has been pulled up.
3. Check the Inactive box located in the top portion of the module screen.
4. Update any applicable information (e.g. contact, notes, etc.) It's always a good idea to document the reason for inactivating a license in the **Notes** tab.
5. Click **Save** to complete the process.



The inactive license will be saved into the system with all updated information. The license will be marked as being **Inactive** with a check. When a license is marked inactive, it will not show up when the expired letters are generated.

If for any reason an inactive letter needs to be generated, there is a **Show Inactive** switch in the Expired Letters screen.



If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

January 2015

BAS Monthly Tip Sheet

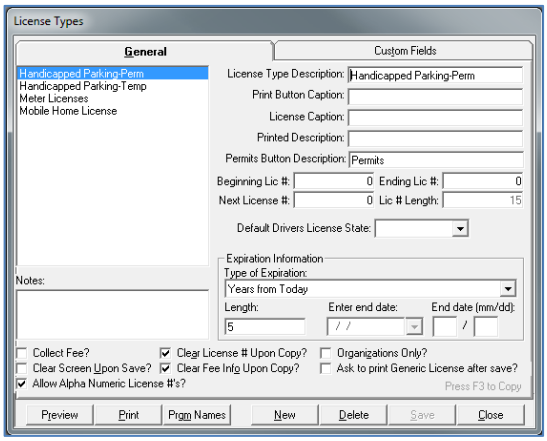
☑ General Licensing- Changing "Handicap" to "Accessible"

A change to NYS Law is requiring that the word "Handicap" be replaced by the word "Accessible". As a result, some configuration within the General Licensing module is needed to meet the new state law requirements.

Updating License Name:

1. Go to: *Tools → Lookup Files → License Type*
2. On the left, highlight **Handicapped Parking-Perm.**

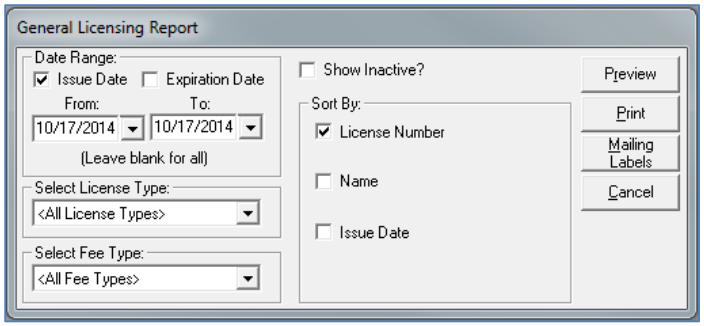
   Note: *The license information will populate into the form on the right side of the screen.*
3. In the ***License Type Description*** field, change *Handicapped Parking-Perm* to *Accessible Parking-Perm.*
4. Click ***Save.***
5. Update *Handicapped Parking-Temp* following the same steps.



Note: *Updating the license name will also update the license type for all existing licenses.*

The following steps will ensure that the change was made to all existing records. Changes to the handicap letter will be updated to comply with these changes in an upcoming release. If you would like to update the letter now, please contact BAS Support for assistance.

Verify Updated History:



1. Under **General Licensing Report**. Go to:
   Reports → General Licensing Report
2. Enter a date range. Be sure to include a date from years past through today.
3. Select **Accessible Parking** license type from the **License Type** dropdown.
4. Click **Preview**. Results should display and include existing licenses.
5. Run the report for both Accessible Parking Permits.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

February 2015

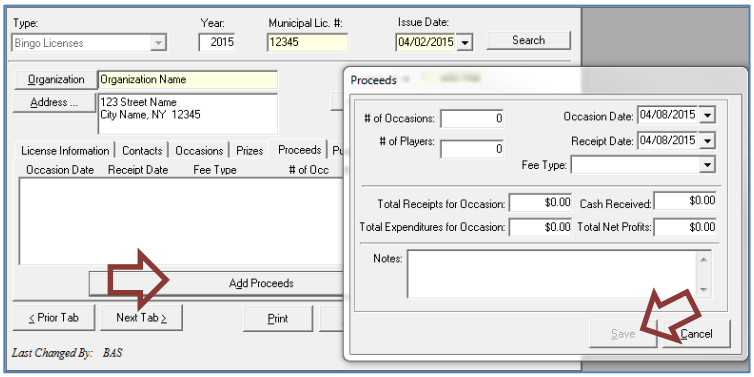
BAS Monthly Tip Sheet

☑ *Adding/Voiding Proceeds in Racing & Wagering*

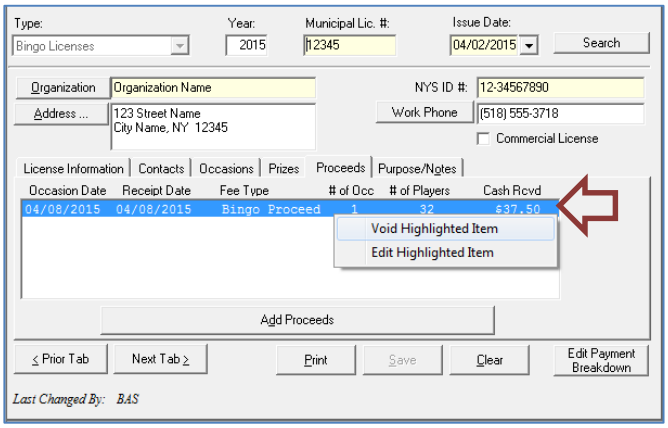
Organizations first need to purchase a Racing & Wagering license from the Town Clerk's office and proceeds are added after the license has been issued. Once a license has been issued proceeds can be tracked for as long as the license is valid.

To add proceeds:

- Search for the license.
- Click on the PROCEEDS tab.
- Click **ADD PROCEEDS** to bring up the Proceeds screen.
- Enter the information and click **SAVE**. This will prompt the Payment Information screen to appear.



Note: Once the payment information is saved the Proceeds will be added to the license.



To void proceeds:

- Click on the Proceed that needs to be voided and right click.
- When the menu comes up click **VOID HIGHLIGHTED ITEM.**
- Enter a reason and **SAVE** the void.

Note: Proceeds MUST be voided before a license can be voided. Once a record has been voided, proceeds cannot be added to that record again.

> ***Quick Tip:*** *Voided licenses can be searched using the license number and page up and page down keys. A license number from a voided record can be re-used on a new license.*

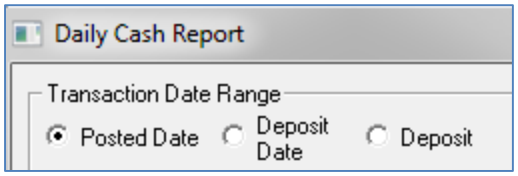
If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

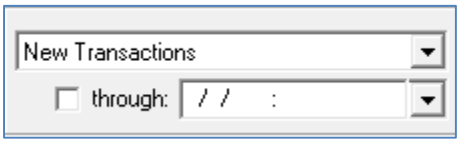
April 2015

BAS Monthly Tip Sheet

☑ *Daily Cash Report*

New features of the Daily Cash Report include the ability to generate the report by Posted Date, Deposit Date, and Deposit. In addition, new sorting options are now available.





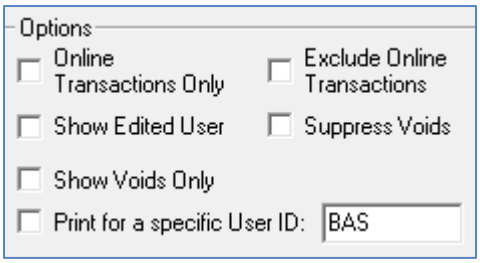
Select the Transaction Date Range you wish to view**:**

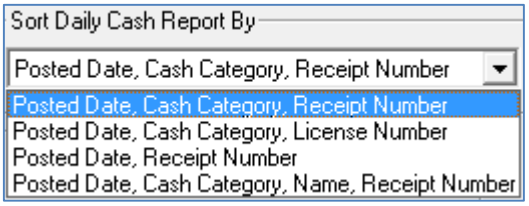
- **Posted Date-** This date is typically the same as the issue date of a record. A date range is required.
- **Deposit Date-** This references transactions deposited within the given date range.
- **Deposit-** When choosing this option, the user will report for a given deposit session.

*Note: The Deposit Date and the Deposit are based on information recorded in the **Deposit Tracking Module**.*

Additional sorting options allow the user to further define the results of their report, select from the following:

- Online Transactions Only
- Showed Edited User
- Show Voids Only
- Print for a specific User ID
- Exclude Online Transactions
- Suppress Voids



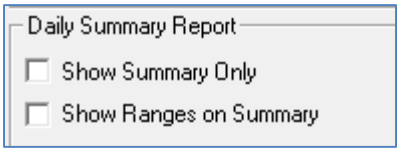


From the dropdown, select the **Sort Daily Cash Report By:**

- Posted Date, Cash Category, Receipt Number
- Posted Date, Cash Category, License Number
- Posted Date, Receipt Number
- Posted Date, Cash Category, Name, Receipt Number

*Note: Default sort by options can be set in the **Cashbook Module Control** by going to* System Manager-> Settings-> Cashbook Module Control.

You have the ability to display the summary only without the details and you can also choose to display the ranges on the summary.



If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

March 2015

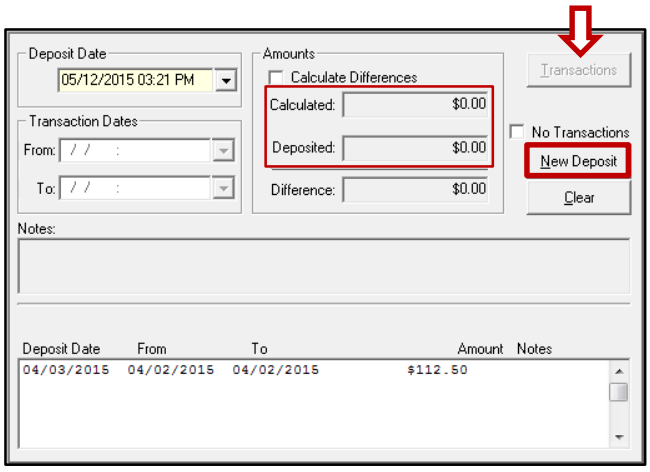
BAS Monthly Tip Sheet

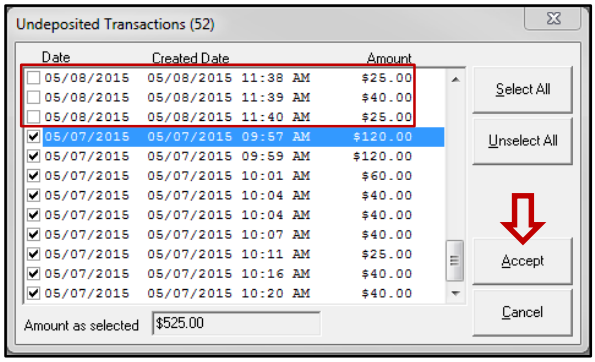
☑ *Deposit Tracking – Transaction Method*

The Deposit Tracking module can help users track their bank deposits. These deposits can be tracked by the dates that bank deposits are made.

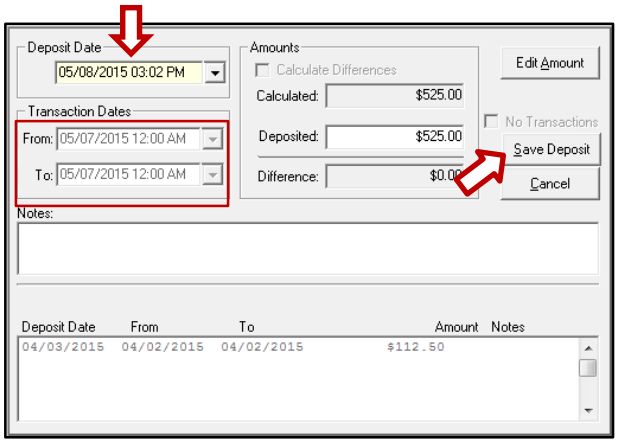
To make a new deposit:

1. Click **New Deposit** on the main screen.
2. The **Calculated** and **Deposited** amounts will populate.
3. If the amounts on the screen don't match the bank deposit, it is possible that there are transactions that should not be deposited.
4. Click on **Transactions** to see all of the transactions being deposited.
5. In the **Undeposited Transactions** screen there are several transactions for 5/7/2015 and three for 5/8/2015. In this example, if you only wish to deposit the transactions for 5/7/2015, uncheck the transactions dated 5/8/2015 to exclude them from the deposit.
6. Click **Accept** to return to the main screen.





Note: *The total should now match what is in the bank deposit.*



The deposit screen will display the Transaction Dates of 5/07/2015 to 5/07/2015 since this is the only day being deposited.

Note*: If more than one day is to be deposited, those dates will display. The Transaction Dates range from the earliest transaction in the deposit to the latest.*

The Deposit Date should always be the date of when the bank deposit was made. Once verified, click **Save Deposit**.

Note: *The Deposited amount is calculated by the transactions entered into the system and should match the deposits made at the bank.* ***This amount should never be changed from the total calculated by the system****. If the amount does not balance, click on Transactions and review the list that is displayed.*

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

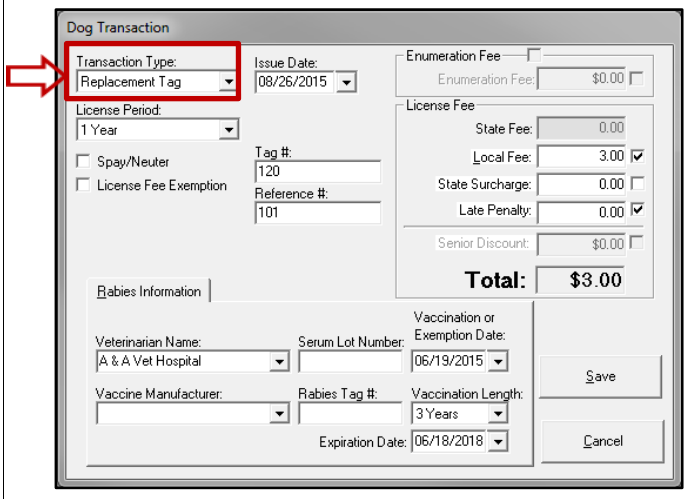
May 2015

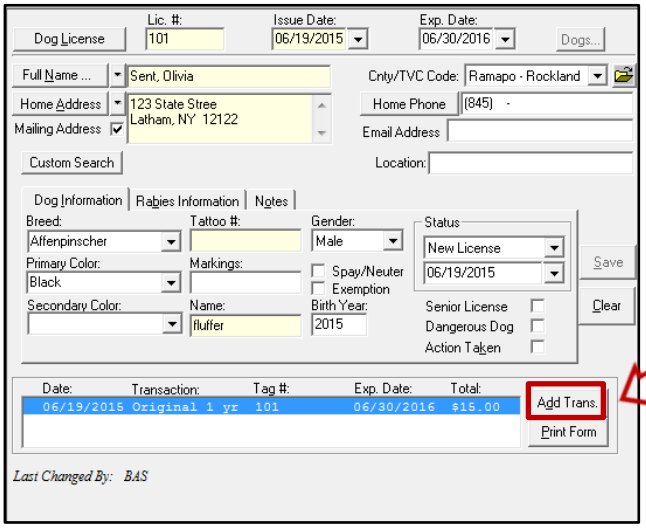
BAS Monthly Tip Sheet

☑ Adding Replacement Tags to an Existing Dog License

When a dog license tag is lost or ruined, a replacement tag may need to be issued.

1. Search for the license that will require the replacement tag to be added to it.
2. Click on the **Add Trans.** Button.
3. Click on the **Transaction Type** dropdown, and choose **Replacement Tag**.

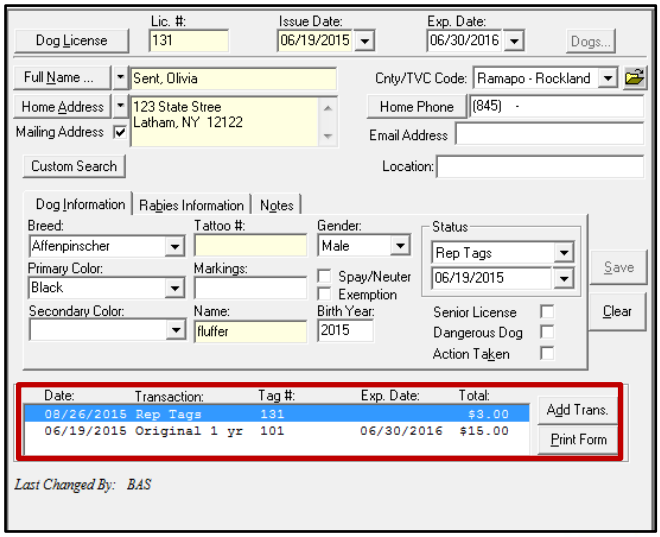




Note: If you have auto-numbering turned on, the new tag number should automatically fill in, and the old tag # will move into the reference # field.

4. If you collect a fee for replacement tags, verify the fee amount is correct.
5. Once the information is entered, click **Save**.

6. The newly entered tag will be added to the transactions grid, displayed as **Rep Tags.**
7. By highlighting the new transaction in the grid, you can now print the form for the replacement tag that was just issued.



Note: When you search for the license in the future, the new tag number will now be the License # you will search by.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

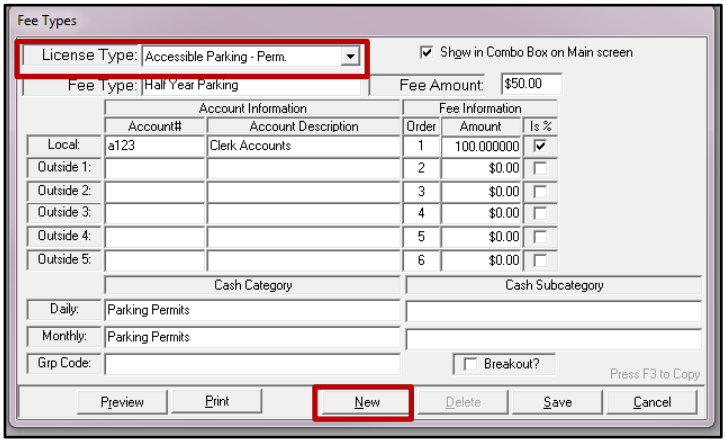
November 2015

BAS Monthly Tip Sheet

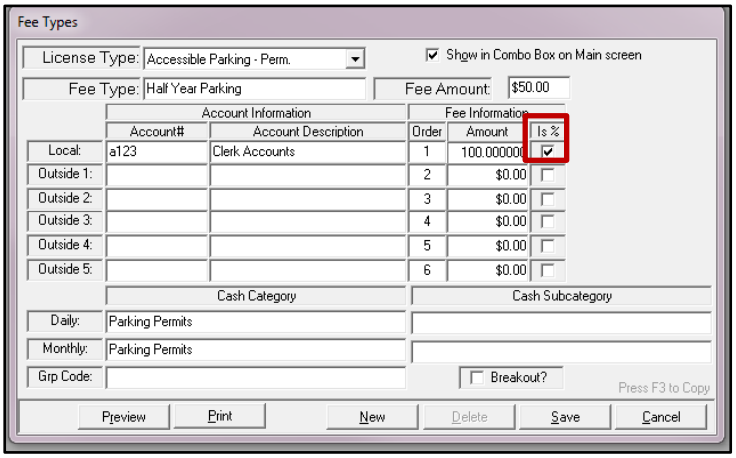
☑ *Adding New Fees*

As time goes on, new fees may need to be created in your system. Adding a new fee to your Miscellaneous Cash or General Licensing module is easy, if you follow these steps below.

Fee File:



1. Go to: Tools → Lookup Files → Fee File
2. Select the appropriate License from the dropdown labeled: *License Type.*
   Note: Fees are associated to the License Type selected. If a single fee applies to multiple licenses, the fee will need to be configured individually for each license type.
3. Click the *New* button.
4. The cursor will appear in the Fee Type drop down. Enter the name of your new fee.
   Note: Fee names are permanent, so be sure the name is entered correctly.
5. Enter a fee amount. Fees can be edited on the main screen, so a default amount will suffice if the fee type varies.
6. Fill in the Account # if you are currently tracking appropriation #'s in our system.
7. Enter an Account Description.



8. Provide the percent of the Fee Amount which will be collected by the municipality. Mark the "Is %" box, if the full amount will go to that account.
   a. If a portion of the fee will be given to another entity, such as the County, the additional account rows can be used to breakout the fee amounts.
9. Enter a Daily and Monthly Category.
   a. This is the category displayed on the cash reports. Fees with identical categories will be grouped together on reports.

10. Click *Save.*

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

December 2015

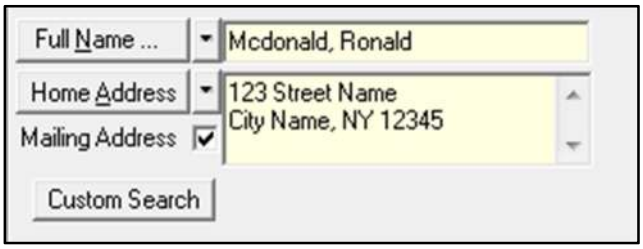
BAS Monthly Tip Sheet

☑ *Formatting Contact Names*

Entering new contacts into the address book with the proper formatting is an important step to ensure licenses and permits printed from the system display information accurately. Below are some tips on how to achieve the desired results.

There are two ways to enter in a contact:

1. **Free Form Entry** - Simply typing the name of the contact into the name field.
2. The System will automatically format text typed freely into the contact fields.
   - An override for the auto-formatting exists in the **System Control File**. Turning the **Global Override** on will prevent any free form text from formatting by system standards.
   - To access the System Control File select: **System Manager->Settings->System Control File**
3. This method is convenient for quick entry but it will automatically change a last name like McDonald into Mcdonald.
   - If Global Override is activated it will leave the entry any way that it is typed.



4. **Structured Entry** - Using the Contact Forms to enter in the information.
   - Forms are opened by clicking the **Full Name** or the **Home Address** button next to the contact field.
   - A temporary **Override AutoFormatting** option exists in the form and will apply the feature to the current record only.
   - This method ensures that the name and address format correctly and will help avoid instances where the Last Name needs to be entered a certain way.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

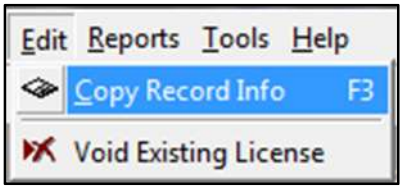
April 2016

BAS Monthly Tip Sheet

☑ Copying Voided Records

It can be time consuming voiding records and then having to re-enter all of the information. The Clerk software's copy feature will save plenty of time when re-entering records and simplify this process. This feature is available in all of the General Modules as well as the Vitals Modules.

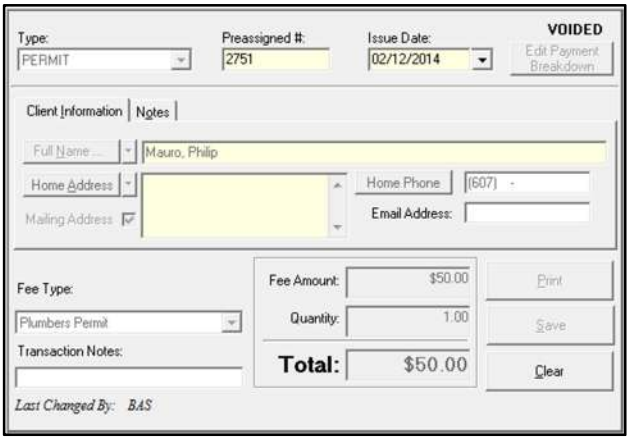
Copying records:

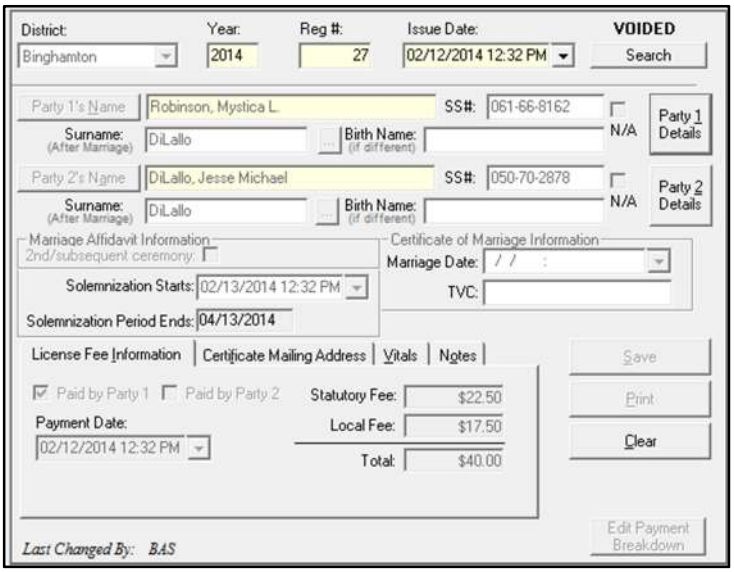


1. The copy feature is useful for records that have been voided, so pull up a voided record and then copy the info.

2. There are two ways to copy a record:
   - The first is to go to Edit → Copy Record Info
   - The second is to just press F3 on your keyboard

3. When copied the record license or permit number will be cleared along with the fees. The same license or permit number may be reused if desired.





4. This feature is especially useful in the Marriage Module if you have to void a license.

5. A copied record will retain all of party 1 and party 2's information so it doesn't have to be re-entered.

6. Like the previous modules, the same registration number may be issued if necessary.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

May 2016

BAS Monthly Tip Sheet

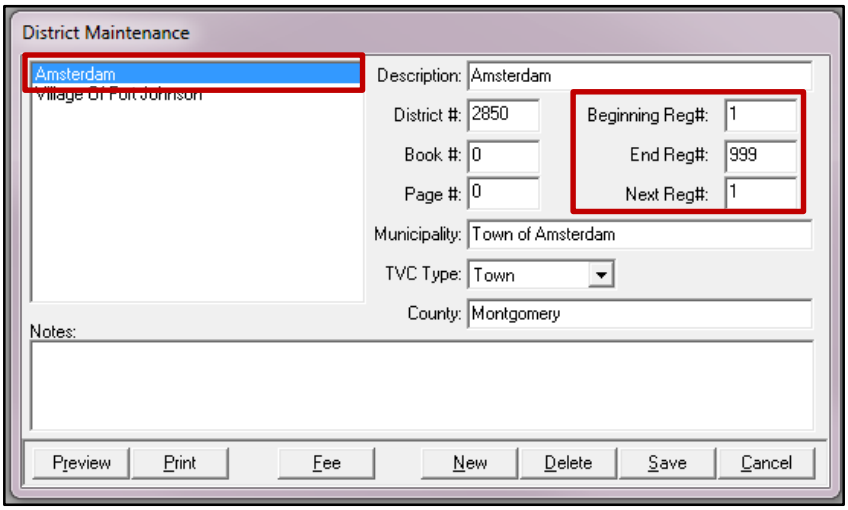
☑ *Re-setting Marriage License Numbers*

As the New Year begins, you need to reset the next registration number back to 1 in your marriage module. Below are the instructions to accomplish this.

Fee Files:

1. Go to: Tools → Lookup Files → District Maintenance.
2. Double click the District on the left that you want to edit.
3. On the right side of the screen, verify that the Beginning Reg. # is set to 1.
4. The End Reg. # must be entered as well. If you do not stop at a particular number, you can enter 999.
5. Reset the Next Reg. # to 1.
6. Save the changes, and close the window.
7. The licenses have now been reset, and will begin from the # 1 for the New Year!

Note: If you utilize the Birth Certification, Death and Burial Transit modules, you can follow the same instructions as above.



Do you have an idea for a future tip sheet you'd like to see? We are always looking for improvements, so please feel free to contact us at any time with any feedback or suggestions you might have.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

January 2016

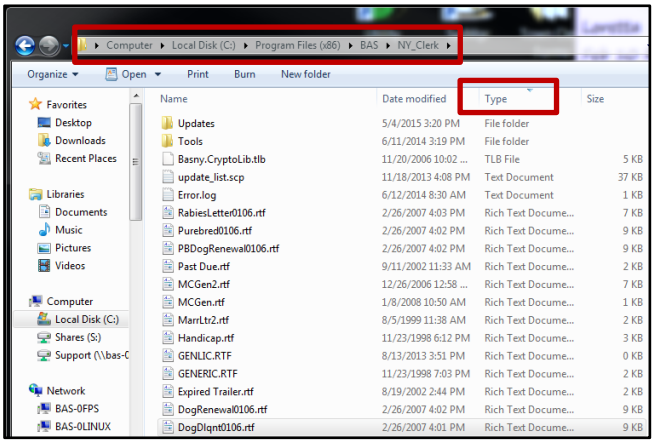
BAS Monthly Tip Sheet

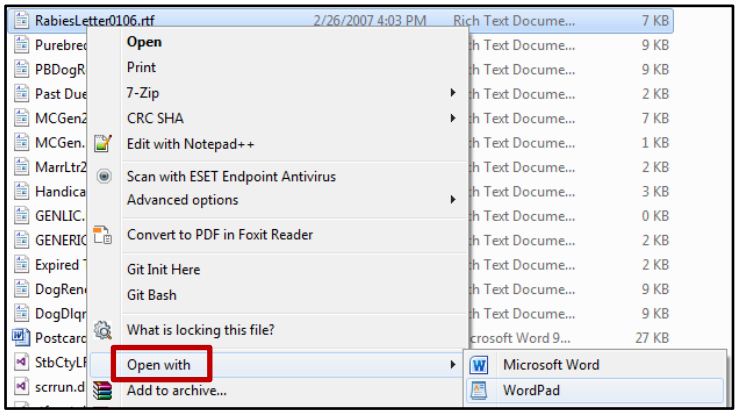
☑ *Editing RTF Letters*

Letters that are generated within the Clerk system may be modified. Steps are listed below on how to go about making such changes.

Locating the letters:

1. Right click on the shortcut located on your desktop used to access the system and select Open File Location.
2. To sort the files click on the column name **Type**. Usually the letters will be sorted first as displayed in the image but if not just click on **Type** again. The file type for the letters will be Rich Text Format.
3. The text in the .rtf files can be edited but be sure to open them with WordPad instead of Microsoft Word. Right click on the file you want to open and select Open With → WordPad.
   Note: ***Avoid the bracketed fields. These are necessary to pull information from the system.***





4. Once changes are made to the letters click Save to finalize it.

Note: These letters are found on each workstation; therefore, when a change is made it is only available for that workstation. If multiple workstations are used in the office it is recommended that a shared folder is created that all users of the system will have access to. The Clerk software will have to be reconfigured so that each of the file paths for the letters are set to the shared location of the letters. IT personnel can assist in setting up a shared folder if the office does not already have one.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

February 2016

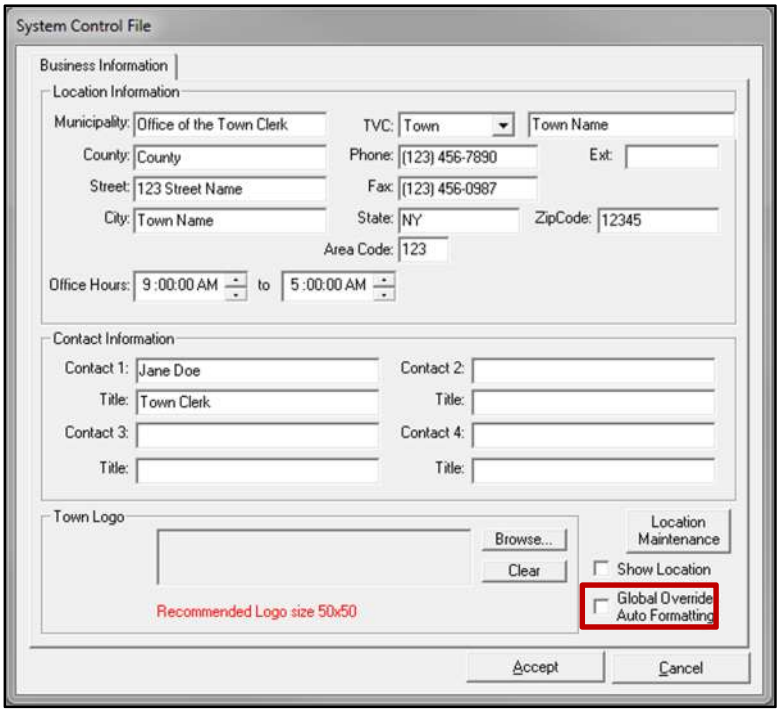
BAS Monthly Tip Sheet

☑ *Editing Contact Information*

Contacts change often and it is important to have the correct information displayed on printed licenses. To change or verify contact information follow these instructions.

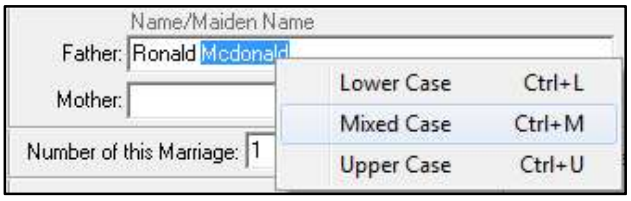
Contact Information:

1. Go to System Manager → Settings → System Control File
2. Verify that the Location Information is up to date.
3. Below is the Contact Information where the names of the Clerk, Deputy Clerk and anyone else whose name should appear on licenses or receipts.



Global Override Auto Formatting:

1. The Global Override option will disable the auto formatting for all data entered into the system. For this purpose, the data entered must be reviewed carefully before saving.
2. To enable Global Override go to System Manager → Settings → System Control File
3. The switch is located at the bottom right side of the screen.



Mixed Case:

1. With names that use a mix of lower and uppercase, use the Mixed Case feature to enter the names as they are spelled.
2. In the example we have Ronald Mcdonald. Highlight Mcdonald and then right click and select Mixed Case. Now erase the lowercase d and add the uppercase D. Moving on to another field will keep the name with the proper formatting instead of reverting back.
3. This feature is available throughout the software and is especially useful in the Marriage Module.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

June 2016

BAS Monthly Tip Sheet

☑ Verifying Backups

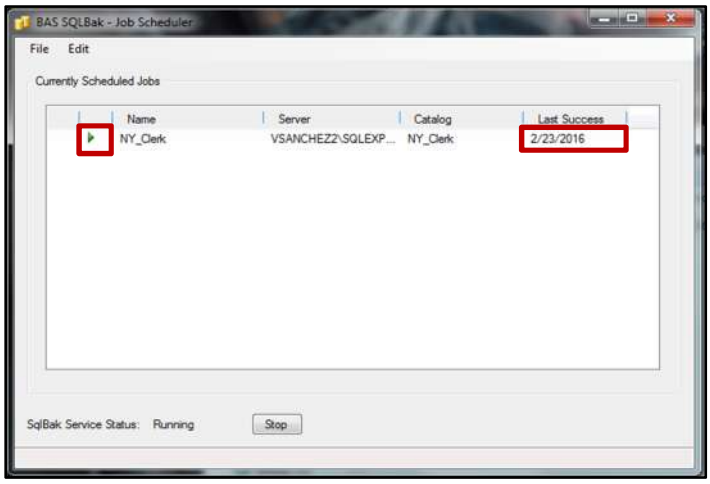
BAS provides a program called SQLBak to create backups of your SQL databases. This program should be on the fileserver and/or workstation that your databases are stored on. To verify the backups are running properly follow the steps below.

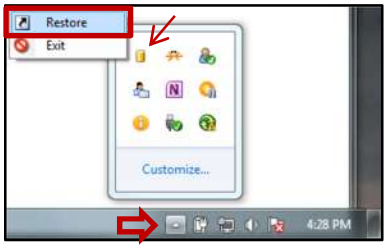
Verify Backups Are Running:

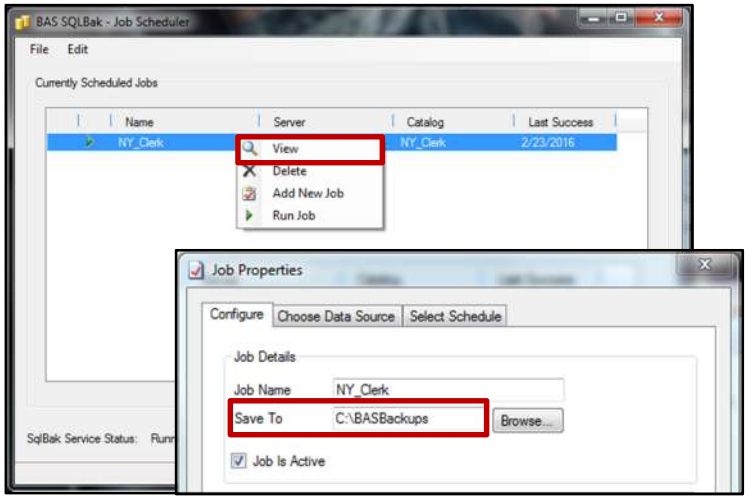
1. Launch the SQLBak program by double clicking on the SQLBak icon located on the desktop. The icon is represented by two gold cylinders.
2. If the icon is not present on the desktop go to the Start Menu → All Programs → BAS → SQLBak
3. If message "SQLBak is already running!" comes up it means that SQLBak can be opened from the task tray by right clicking on the gold cylinder and selecting Restore. The tray is located towards the bottom right of the screen.

   Note: ***This program should be on the fileserver and/or workstation that your databases are stored on. If SQLBak is not located on any workstation IT may need to be contacted to have them verify that backups are running on the fileserver.***

4. Once opened, the BAS SQLBak Job Scheduler window will be displayed. Verify the icon to the left of the job name is a green triangle and that the Last Success date is current or a day behind as it may run at the end of the day.







Copy The Files:

1. SQLBak creates a .bak file which is saved to a location chosen in the Job Properties. It is also important that these files are saved to another location.
2. To view the Job properties, right click on one of the jobs and select View.
3. The location of the .bak files will be displayed in the Save To field.
   Note: ***Check each job scheduled (Save To) so that you know all directory's that will need to be copied to an external device.***
4. Locate the directory and copy the files to an external device such as a flash drive, CD or other backup device media.

Note: ***If any job in SQLBak displays a red X or a yellow triangle to the left of a job name please contact BAS as soon as possible at 518-371-6869 or e-mail support at support@basgov.com***

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

March 2016

BAS Monthly Tip Sheet

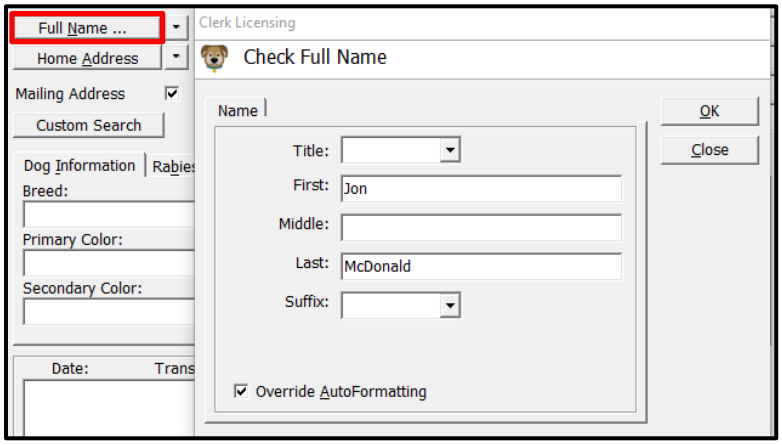
☑ *Formatting Contact Names*

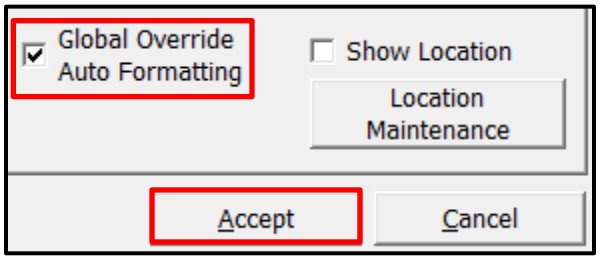
Entering new contacts into the address book with the proper formatting is an important step to ensure licenses and permits printed from the system display information accurately. Below are some tips on how to achieve the desired results.

Steps:

1. In all modules, these name forms can be opened by clicking **Full Name** next to the contact field.
2. Click on the **Full Name** button and edit the name.
3. Type in the correct spelling. **For example, McDonald.**
4. Check **Override AutoFormatting**
5. Click **OK**

   This method ensures the name is formatted correctly and avoid instances where the Last Name needs to be entered a certain way.





If you want to override the auto formatting through the whole system:

Go to System Manager > Settings > System Control File

Check the checkbox next to **Global Override Auto Formatting** and click **Accept (This will require a restart of the Clerk program on all workstations)**

Note: If Global Override is activated, it will save the entry the way it is typed in.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.

January 2019

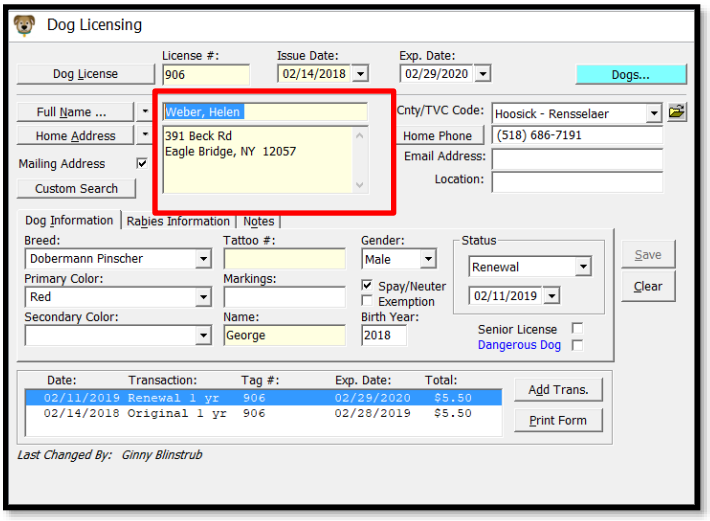
BAS Monthly Tip Sheet

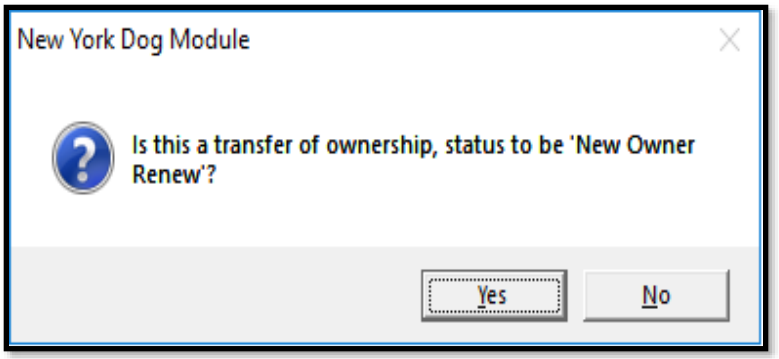
☑ *Dog License Transfer of Ownership*

To transfer the ownership of an existing dog license follow the steps below. The transaction type will display as a New Owner Renew.

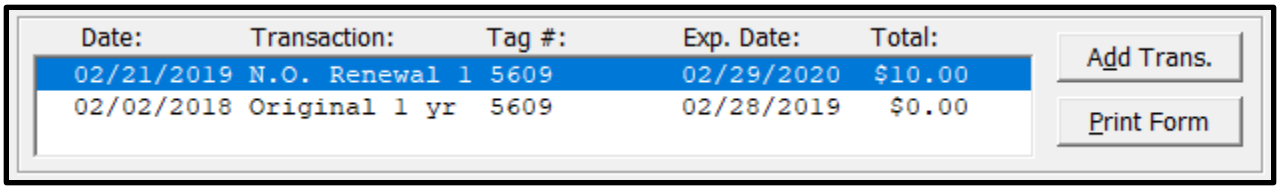
Steps:

1. Search for the dog license that needs to be transferred to a new owner.
2. Highlight the owner in the Full Name field.
3. Update the Full Name, then highlight and update the Home Address for the new owner.
4. After the Full Name and Home Address have been updated, click the save button.
5. The following message will appear:





Clicking YES to this message will update the dog license status, and also will update the Transaction Type on the Dog Transaction to New Owner Renewal.



The user can complete the transaction and the dog license will now be updated with the new owner.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.

February 2019

March 2019 Monthly Tip Sheet

☑ *How to Purge General Licensing Records*

Users have the ability to purge General Licensing Records that are at least 6 years prior to the current date.

To locate the General Licensing Purge – navigate to the **General Licensing** module, go to **Tools > Purge Records.**

Note: A current backup must exist prior to running this purge routine.

PURGE TRANSACTIONS THROUGH DATE - Date must be at least 6 years prior to the current date.
DATE OF PURGE - The current calendar date.
DISPOSAL METHOD - Description of how the records are being removed from the Clerk's office.

Steps:

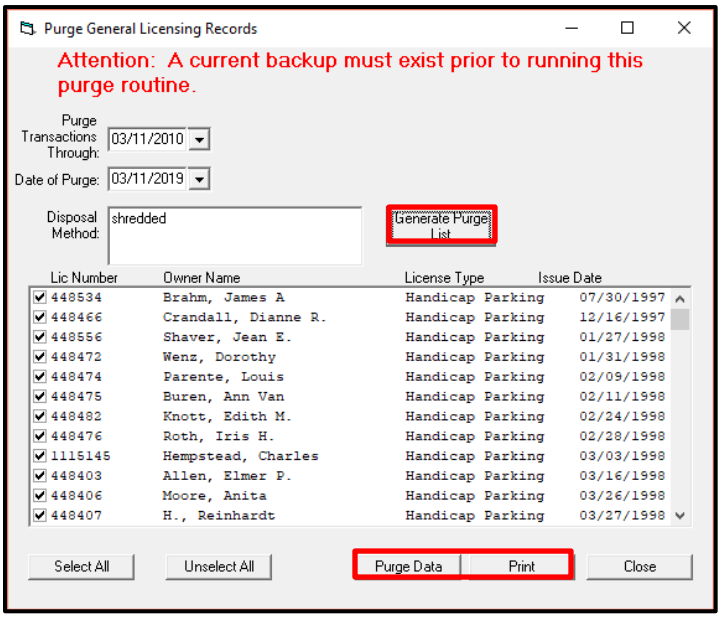
1. Select date for **Purge Transactions Through** and **Date of Purge.** Enter in the **Disposal Method**.

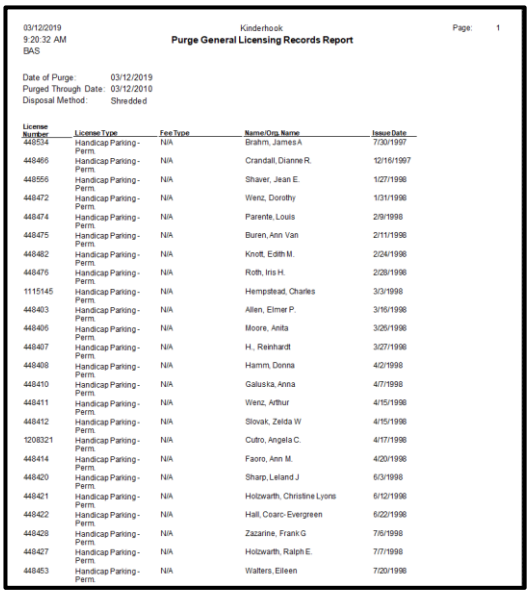
2. Click on **Generate Purge List**. This will list all the records that are eligible to be purged. Users are able to uncheck/check the boxes in order to keep or remove the records.

3. Once the records have been selected, click on Print to print the **Purge General Licensing Records Report.**

4. Click the **Purge Data** button in order to purge the data. A prompt will pop-up **"Are you sure you want to purge the following data? Data that is purged will no longer be available."** click on **Yes.**

5. A **Purge General Licensing Records Report** will generate after the records are purged.





April 2019 Monthly Tip Sheet

☑ *Handling Voids in The Decals Module*

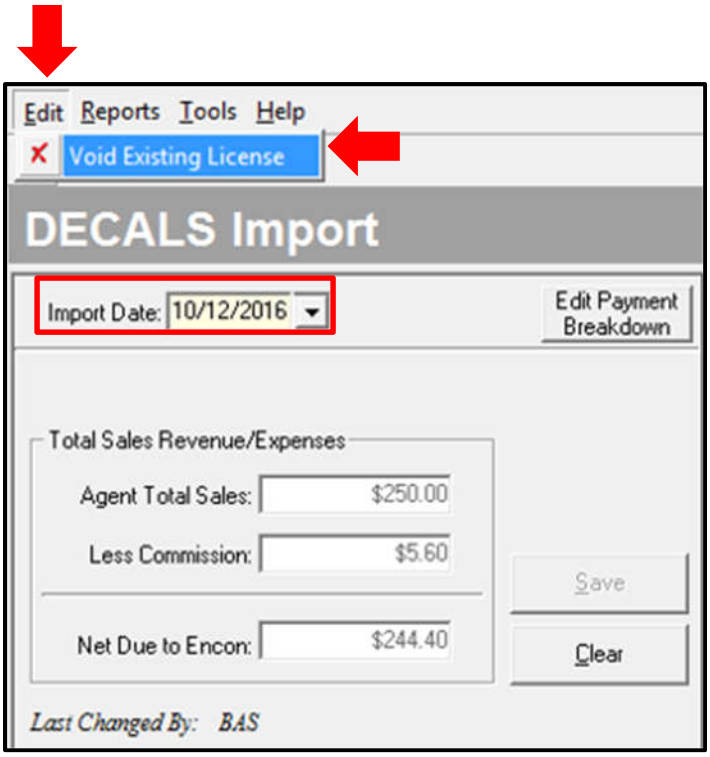
On occasion, you may find the need to void a record within the Decals module.

On occasion you may find the need to void a record within the Decals Module.

To Void an Entry:

1. Enter the desired date in the IMPORT DATE field, use the PAGE DOWN key to search for the record.
2. Click the EDIT tab at the top of the screen and choose VOID EXISTING LICENSE.
3. A message will appear asking if you would like to continue with the void, Click YES.
4. Enter a VOID EXPLANATION or click OK to continue without an explanation.
5. The record is now voided.

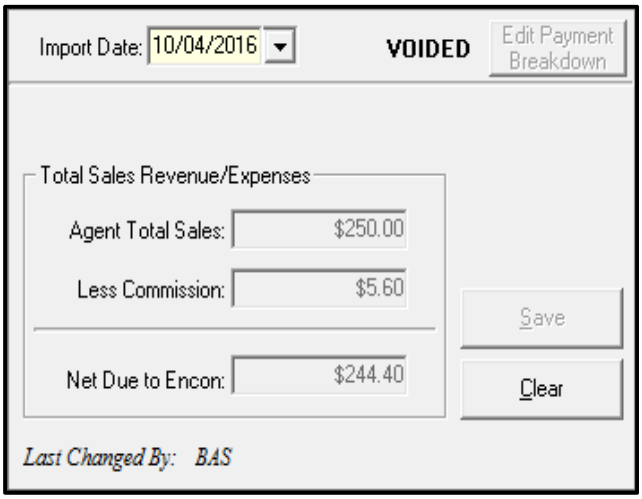
NOTE: Do not click the EDIT PAYMENT BREAKDOWN button.



To Locate a Void:

1. Enter the date of the void and press the PAGE DOWN key.
2. If the record does not appear, press PAGE DOWN again.
3. The voided entry will display on the Daily Cash report when the date range of the voided transaction has been entered.

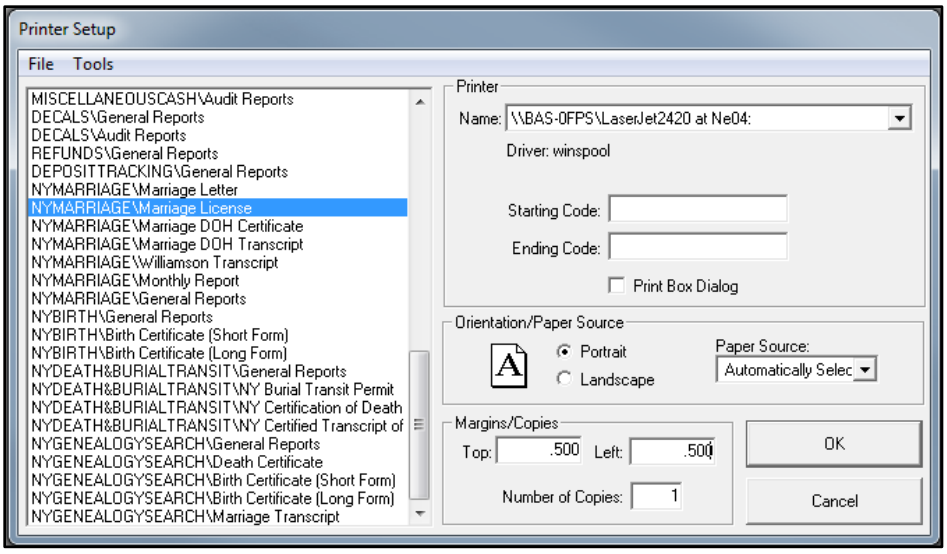
NOTE: If a voided decals record was later re-entered with the same date as the original, then both records will exist for that import date.



May 2019 Monthly Tip Sheet

☑ *Printer Margins*

There are multiple forms in the program that need to be aligned when printing. Below are steps to achieve the desired results.



1. System Manager > Printer Setup
2. On the left side, select the document that needs to be adjusted. Make sure that the printer is correctly selected.
3. Look at the **Top** and **Left** margins in the bottom right of the screen. This is where the margins will be changed to align the printout.
4. When changing margins, be sure to keep them between .001 and .999
5. As a reference:
    a. **TOP:** To shift the text on the form *down*, *increase* the top margin number. To shift the text *up, decrease* the top margin number.
    b. **LEFT:** To shift the text on the form *right, increase* the left margin number. To shift the text to the *left, decrease* the left margin number
6. In this example, the **Marriage License** has been set to .500 and .500 for both the **Top** and **Left** margin.
7. Start by making small changes, such as increasing or decreasing the number by .100 or .250

Note: It is recommended that you print on blank paper and hold against a hard copy, so that you are not using original forms.