



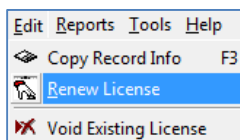
BAS Monthly Tip Sheet

General Licensing Renewals

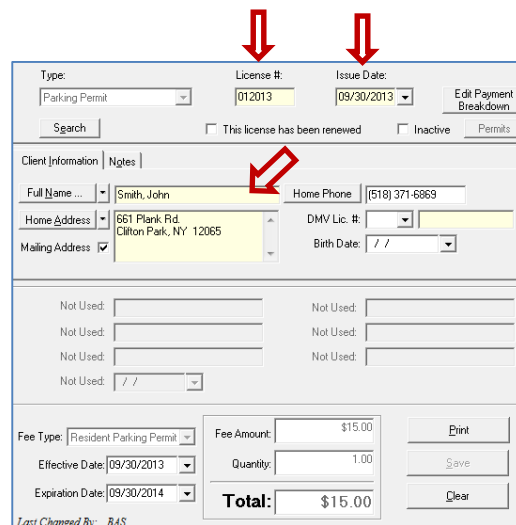
The General Licensing Module offers users the ability to renew licenses for the upcoming period. Renewing licenses not only allows users to easily update their records but also track the existing and past licenses of the applicant.

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**

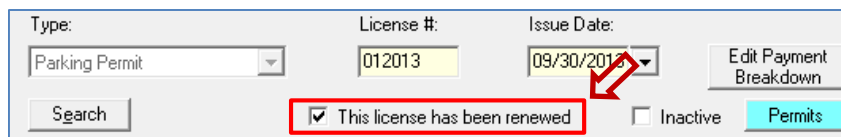


4. A new license will be created. The new license will include:
 - a. The original contact information
 - b. The correct license type
 - c. The fee type (this feature must be turned on)
 - d. The license number (this feature must be turned on)
5. Update any applicable information (e.g. contact, fees,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



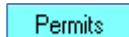
The screenshot shows a license renewal form. At the top, there are fields for Type (Parking Permit), License # (012013), and Issue Date (09/30/2013). Below these are checkboxes for 'This license has been renewed', 'Inactive', and 'Permits'. The 'Permits' button is highlighted. The form also includes a 'Search' button and an 'Edit Payment Breakdown' button. Below the checkboxes is a section for Client Information, including Full Name (Smith, John), Home Address (661 Plank Rd., Clifton Park, NY 12065), Home Phone ((518) 371-6869), DMV Lic. #, and Birth Date. There are also fields for 'Not Used' information. At the bottom, there is a section for Fee Type (Resident Parking Permit), Fee Amount (\$15.00), Effective Date (09/30/2013), Expiration Date (09/30/2014), and a Total of \$15.00. Buttons for 'Print', 'Save', and 'Clear' are present. The last line indicates 'Last Changed By: BAS'.

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



This screenshot shows the same license renewal form as above, but with the 'This license has been renewed' checkbox checked. A red arrow points to the checkbox.

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.





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

District: Durham Year: 2014 Reg #: 20 Issue Date: 11/19/2014 01:04 PM Search

Party 1's Name: Doe, John SS#: 123-45-6789 Party 1 Details

Party 2's Name: Smith, Jane SS#: 123-45-6789 Party 2 Details

Marriage Affidavit Information: 2nd/subsequent ceremony: Solemnization Starts: 11/20/2014 01:04 PM Marriage Date: 12/24/2014 01:04 PM TVC: Town Of Town Solemnization Period Ends: 01/18/2015

License Fee Information: Certificate Mailing Address: Vitals: Notes: Save

Statutory Fee: \$22.50 Local Fee: \$7.50 Total: \$30.00

Payment Date: 11/19/2014 01:04 PM

Last Changed By: BAS

Edit Payment Breakdown

Dog License Lic #: 9999 Issue Date: 11/19/2014 Exp. Date: 11/30/2015 Dogs...

Full Name: Smith, John Only/TVC Code: Durham - Greene

Home Address: 123 Street Name Town Name, NY 12345 Home Phone: (518) 123-4567

Mailing Address: Town Name, NY 12345 Email Address: Location:

Custom Search

Dog Information Rabies Information Notes

Breed: Dachshund - miniature Tattoo #: Gender: Male Status: New License

Primary Color: Black Markings: Spay/Neuter: 11/19/2014

Secondary Color: Brown (Liver) Name: Birth Year: 2014 Senior License: Action Taken: Clear

Date: 11/19/2014 Transaction: Original 1 yr - 9999 Exp. Date: 11/30/2015 Total: \$18.00 Add Trans.

Void Highlighted Item Edit Highlighted Item

Last Changed By: BAS

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**

Payment Information

Transactions Received Thru: Counter Posted Date: 11/19/2014

Fee Description Amount

Marriage L \$30.00

Make a Payment

Paid By: Doe, John Payment Type: Cash Doc #: Amount: \$30.00

Check #: Amount: \$30.00

Clear Update Payment

Notes:

Total Amount Owed: \$30.00 Total Amount Paid: \$30.00 Change Due: \$0.00 User ID: Save

Receipt #: 520923

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**

Payment Information

Transactions Received Thru: Counter Posted Date: 11/19/2014

Fee Description Amount

Dog License \$18.00

Make a Payment

Paid By: Smith, John Payment Type: Cash Doc #: Amount: \$8.00

Check #: 123 Amount: \$10.00

Clear Add Payment

Notes:

Total Amount Owed: \$18.00 Total Amount Paid: \$18.00 Change Due: \$0.00 User ID: Save

Receipt #: 520922

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.

Import Date: 09/29/2014 Edit Payment Breakdown

Total Sales Revenue/Expenses

Agent Total Sales: \$254.00

Less Commission: \$2.65

Net Due to Encon: \$251.35

Save Clear

Last Changed By:

Void Explanation

Please enter an explanation for voiding this record (Optional)

Had another gentleman come in for a hunting license. Need to add to today's total.

Posted Date: 09/12/2014 Amount Voided: \$82.00

OK Cancel

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.

Import Date: 09/29/2014 VOIDED Edit Payment Breakdown

Total Sales Revenue/Expenses

Agent Total Sales: \$254.00

Less Commission: \$2.65

Net Due to Encon: \$251.35

Save Clear

Last Changed By: BAS

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

October 2014





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.





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.





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.

Deposit Date: 05/12/2015 03:21 PM

Amounts: ☐ Calculate Differences

Calculated: \$0.00

Deposited: \$0.00

Difference: \$0.00

Transaction Dates: From: / / To: / /

Notes:

Deposit Date	From	To	Amount	Notes
04/03/2015	04/02/2015	04/02/2015	\$112.50	

Undeposited Transactions (52)

Date	Created Date	Amount
<input type="checkbox"/> 05/08/2015	05/08/2015 11:38 AM	\$25.00
<input type="checkbox"/> 05/08/2015	05/08/2015 11:39 AM	\$40.00
<input type="checkbox"/> 05/08/2015	05/08/2015 11:40 AM	\$25.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 09:57 AM	\$120.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 09:59 AM	\$120.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 10:01 AM	\$60.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 10:04 AM	\$40.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 10:04 AM	\$40.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 10:07 AM	\$40.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 10:11 AM	\$25.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 10:16 AM	\$40.00
<input checked="" type="checkbox"/> 05/07/2015	05/07/2015 10:20 AM	\$40.00

Amount as selected: \$525.00

Deposit Date: 05/08/2015 03:02 PM

Amounts: ☐ Calculate Differences

Calculated: \$525.00

Deposited: \$525.00

Difference: \$0.00

Transaction Dates: From: 05/07/2015 12:00 AM To: 05/07/2015 12:00 AM

Notes:

Deposit Date	From	To	Amount	Notes
04/03/2015	04/02/2015	04/02/2015	\$112.50	

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**.

Dog Transaction

Transaction Type: **Replacement Tag** (highlighted with a red box and arrow)

Issue Date: 08/26/2015

Enumeration Fee: \$0.00

License Fee: \$3.00

State Fee: 0.00

Local Fee: 3.00

State Surcharge: 0.00

Late Penalty: 0.00

Senior Discount: \$0.00

Total: \$3.00

Rabies Information

Veterinarian Name: A & A Vet Hospital

Serum Lot Number: 06/19/2015

Vaccine Manufacturer: 3 Years

Expiration Date: 06/18/2018

Save

Cancel

Dog License

Lic #: 101

Issue Date: 06/19/2015

Exp. Date: 06/30/2016

Dogs...

Full Name: Sent, Olivia

City/TVC Code: Ramapo - Rockland

Home Address: 123 State Stree

Home Phone: (845)

Mailing Address: Latham, NY 12122

Email Address:

Custom Search

Location:

Dog Information

Breed: Affenpinscher

Tattoo #: 120

Gender: Male

Status: New License

Primary Color: Black

Markings:

Spay/Neuter: []

Exemption: []

Secondary Color:

Name: fluffer

Birth Year: 2015

Senior License: []

Dangerous Dog: []

Action Taken: []

Save

Clear

Date: Transaction: Tag #: Exp. Date: Total:

06/19/2015	Original	1 yr	101	06/30/2016	\$15.00
------------	----------	------	-----	------------	---------

Add Trans. (highlighted with a red box and arrow)

Print Form

Last Changed By: BAS

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.

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.

Dog License

Lic #: 131

Issue Date: 06/19/2015

Exp. Date: 06/30/2016

Dogs...

Full Name: Sent, Olivia

City/TVC Code: Ramapo - Rockland

Home Address: 123 State Stree

Home Phone: (845)

Mailing Address: Latham, NY 12122

Email Address:

Custom Search

Location:

Dog Information

Breed: Affenpinscher

Tattoo #: 131

Gender: Male

Status: Rep Tags

Primary Color: Black

Markings:

Spay/Neuter: []

Exemption: []

Secondary Color:

Name: fluffer

Birth Year: 2015

Senior License: []

Dangerous Dog: []

Action Taken: []

Save

Clear

Date: Transaction: Tag #: Exp. Date: Total:

08/26/2015	Rep Tags	131			\$3.00
06/19/2015	Original	1 yr	101	06/30/2016	\$15.00

Add Trans.

Print Form

Last Changed By: BAS

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.

Account Information		Fee Information	
Account#	Account Description	Order	Amount
Local: a123	Clerk Accounts	1	100.000000
Outside 1:		2	\$0.00
Outside 2:		3	\$0.00
Outside 3:		4	\$0.00
Outside 4:		5	\$0.00
Outside 5:		6	\$0.00

Cash Category		Cash Subcategory	
Daily:	Monthly:		
Parking Permits	Parking Permits		

Buttons: Preview, Print, **New**, Delete, Save, Cancel

Account Information		Fee Information	
Account#	Account Description	Order	Amount
Local: a123	Clerk Accounts	1	100.000000
Outside 1:		2	\$0.00
Outside 2:		3	\$0.00
Outside 3:		4	\$0.00
Outside 4:		5	\$0.00
Outside 5:		6	\$0.00

Cash Category		Cash Subcategory	
Daily:	Monthly:		
Parking Permits	Parking Permits		

Buttons: Preview, Print, **New**, Delete, Save, Cancel

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





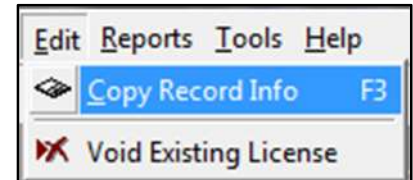
BAS Monthly Tip Sheet

✓ Copying Voiced 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.

District Maintenance

Amsterdam
Village of Port Johnson

Description: Amsterdam

District #: 2850

Book #: 0

Page #: 0

Municipality: Town of Amsterdam

TVC Type: Town

County: Montgomery

Beginning Reg#: 1

End Reg#: 999

Next Reg#: 1

Notes:

Preview Print Fee New Delete Save Cancel

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

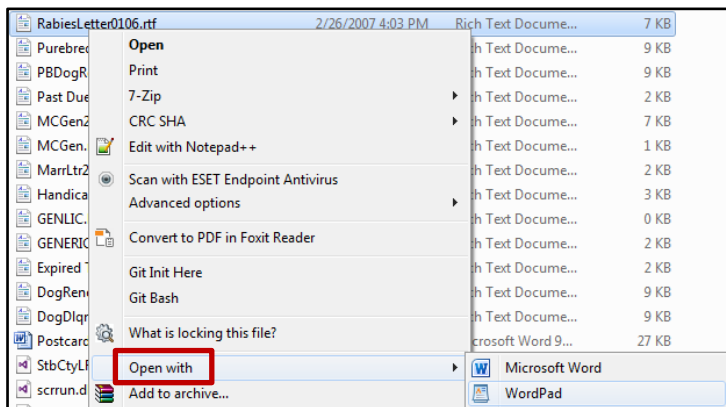
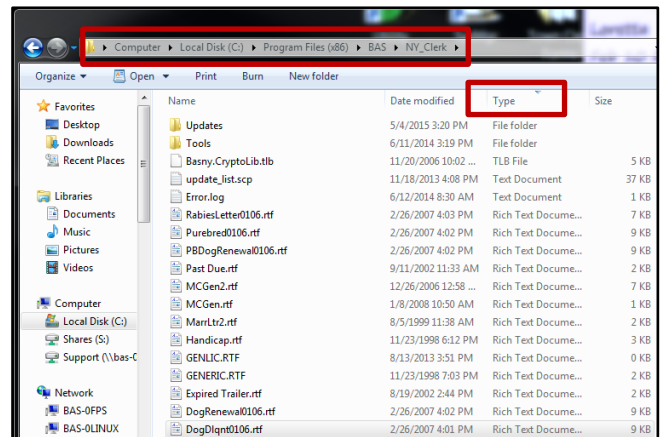
✓ Editing RTF Letters

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

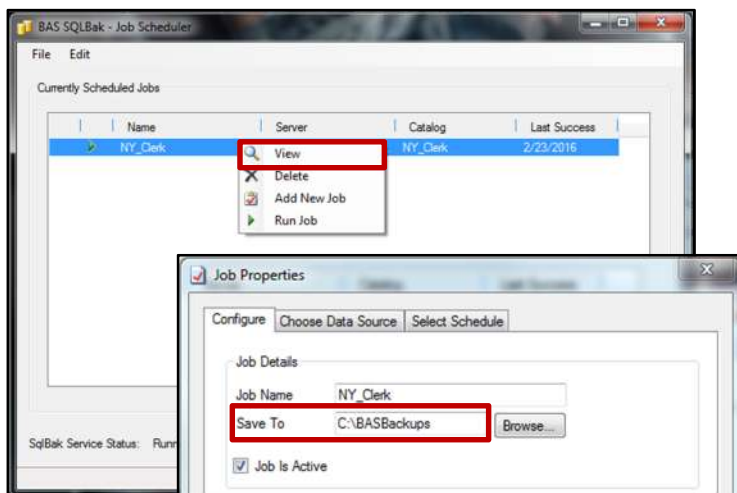
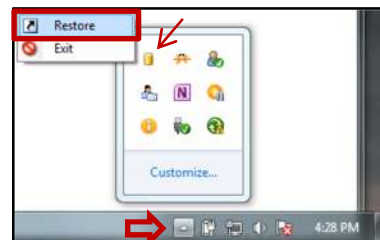
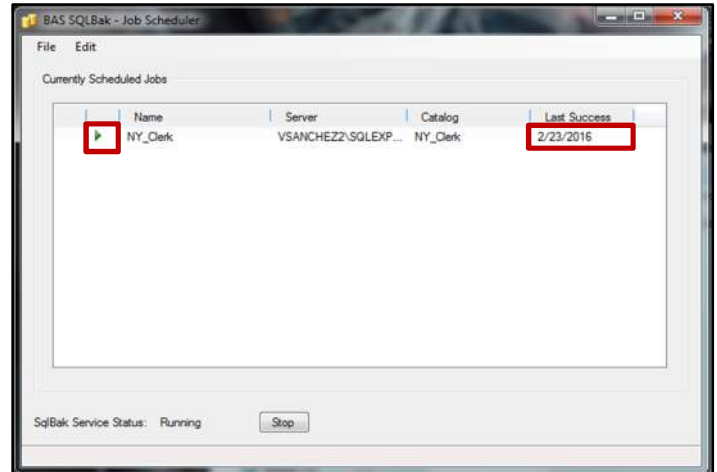
BAS provides a program called SQLBak to create backups of your SQL databases. This program should be on the fileserver and/or workstation that your databases are stored on. To verify the backups are running properly follow the steps below.

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:

Dog Licensing

License #: 906 Issue Date: 02/14/2018 Exp. Date: 02/29/2020 Dogs...

Full Name: Weber, Helen Cnty/TVC Code: Hoosick - Rensselaer

Home Address: 391 Beck Rd Home Phone: (518) 686-7191

Mailing Address: Eagle Bridge, NY 12057 Email Address: Location:

Custom Search

Dog Information | Rabies Information | Notes |

Breed: Doberman Pinscher Tattoo #: Gender: Male Status: Renewal

Primary Color: Red Markings: Spay/Neuter Exemption Birth Year: 2018 Senior License Dangerous Dog

Date: Transaction: Tag #: Exp. Date: Total:

02/11/2019	Renewal 1 yr	906	02/29/2020	\$5.50
02/14/2018	Original 1 yr	906	02/28/2019	\$5.50

Add Trans. Print Form

Last Changed By: Ginny Blinstrub

New York Dog Module

Is this a transfer of ownership, status to be 'New Owner Renew'?

Yes No

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.

Date:	Transaction:	Tag #:	Exp. Date:	Total:	
02/21/2019	N.O. Renewal 1	5609	02/29/2020	\$10.00	Add Trans.
02/02/2018	Original 1 yr	5609	02/28/2019	\$0.00	Print Form

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.

Lic Number	Owner Name	License Type	Issue Date
✓ 448534	Brahm, James A	Handicap Parking	07/30/1997
✓ 448466	Crandall, Dianne R.	Handicap Parking	12/16/1997
✓ 448556	Shaver, Jean E.	Handicap Parking	01/27/1998
✓ 448472	Wenz, Dorothy	Handicap Parking	01/31/1998
✓ 448474	Parente, Louis	Handicap Parking	02/09/1998
✓ 448475	Buren, Ann Van	Handicap Parking	02/11/1998
✓ 448482	Knott, Edith M.	Handicap Parking	02/24/1998
✓ 448476	Roth, Iris H.	Handicap Parking	02/28/1998
✓ 1115145	Hempstead, Charles	Handicap Parking	03/03/1998
✓ 448403	Allen, Elmer P.	Handicap Parking	03/16/1998
✓ 448406	Moore, Anita	Handicap Parking	03/26/1998
✓ 448407	H., Reinhardt	Handicap Parking	03/27/1998

License Number	License Type	Fee Type	Name/Org. Name	Issue Date
448534	Handicap Parking - Perm.	N/A	Brahm, James A.	7/30/1997
448466	Handicap Parking - Perm.	N/A	Crandall, Dianne R.	12/16/1997
448556	Handicap Parking - Perm.	N/A	Shaver, Jean E.	1/27/1998
448472	Handicap Parking - Perm.	N/A	Wenz, Dorothy	1/31/1998
448474	Handicap Parking - Perm.	N/A	Parente, Louis	2/9/1998
448475	Handicap Parking - Perm.	N/A	Buren, Ann Van	2/11/1998
448482	Handicap Parking - Perm.	N/A	Knott, Edith M.	2/24/1998
448476	Handicap Parking - Perm.	N/A	Roth, Iris H.	2/28/1998
1115145	Handicap Parking - Perm.	N/A	Hempstead, Charles	3/3/1998
448403	Handicap Parking - Perm.	N/A	Allen, Elmer P.	3/16/1998
448406	Handicap Parking - Perm.	N/A	Moore, Anita	3/26/1998
448407	Handicap Parking - Perm.	N/A	H., Reinhardt	3/27/1998
448408	Handicap Parking - Perm.	N/A	Hamm, Donna	4/2/1998
448410	Handicap Parking - Perm.	N/A	Galuska, Anna	4/7/1998
448411	Handicap Parking - Perm.	N/A	Wenz, Arthur	4/15/1998
448412	Handicap Parking - Perm.	N/A	Slovak, Zelda W.	4/15/1998
1208321	Handicap Parking - Perm.	N/A	Cutro, Angela C.	4/17/1998
448414	Handicap Parking - Perm.	N/A	Faoro, Ann M.	4/20/1998
448420	Handicap Parking - Perm.	N/A	Sharp, Leland J.	6/3/1998
448421	Handicap Parking - Perm.	N/A	Holzwarth, Christine Lyons	6/12/1998
448422	Handicap Parking - Perm.	N/A	Hall, Coar Evergreen	6/22/1998
448423	Handicap Parking - Perm.	N/A	Zazarine, Frank G.	7/6/1998
448427	Handicap Parking - Perm.	N/A	Holzwarth, Ralph E.	7/7/1998
448453	Handicap Parking - Perm.	N/A	Walters, Eileen	7/20/1998



Transforming the way government works!

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.

The screenshot shows the 'DECALS Import' window. At the top, there are tabs: 'Edit', 'Reports', 'Tools', and 'Help'. Below the tabs is a button labeled 'Void Existing License' with a red 'X' icon. A red arrow points to this button. Below the button is a dropdown menu for 'Import Date' showing '10/12/2016'. To the right of the dropdown is a button labeled 'Edit Payment Breakdown'. Below these are input fields for 'Agent Total Sales' (\$250.00), 'Less Commission' (\$5.60), and 'Net Due to Encon' (\$244.40). There are 'Save' and 'Clear' buttons to the right of these fields. At the bottom, it says 'Last Changed By: BAS'.

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.

The screenshot shows the 'DECALS Import' window. At the top, there are tabs: 'Edit', 'Reports', 'Tools', and 'Help'. Below the tabs is a button labeled 'VOIDED' with a red 'X' icon. To the right of the button is a button labeled 'Edit Payment Breakdown'. Below these are input fields for 'Agent Total Sales' (\$250.00), 'Less Commission' (\$5.60), and 'Net Due to Encon' (\$244.40). There are 'Save' and 'Clear' buttons to the right of these fields. At the bottom, it says 'Last Changed By: BAS'.



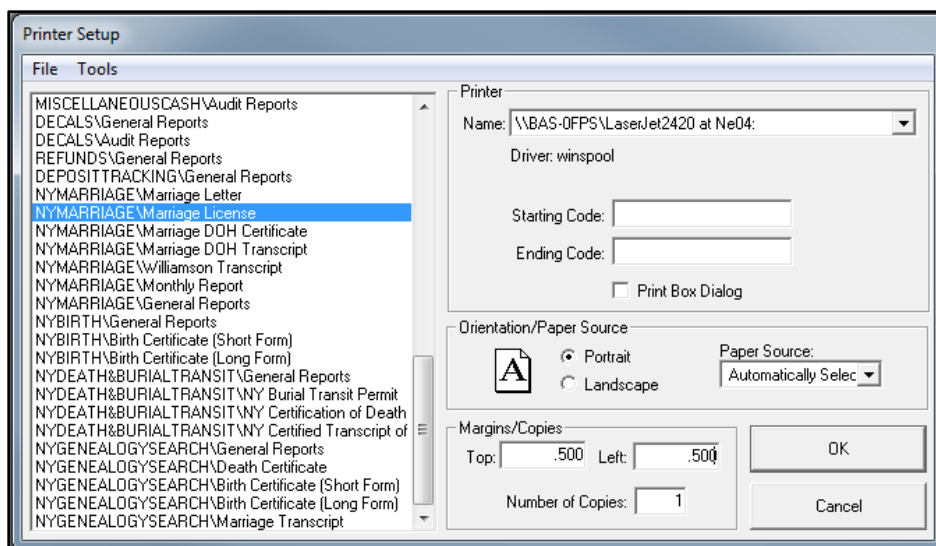
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May 2019 Monthly Tip Sheet

☑ *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.



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