

Business License

New License

1. Set up the Business.

a. Go to Business Licenses – Businesses – Setup New Businesses

Caselle Connect® > Business License > Businesses > Setup New Businesses

Caselle Connect® Setup New Businesses

Business: Business

Business: 11

Business Property Owners Manager Licenses Taxes Attachments Notes

Account number:

Business name:

DBA:

Location: ...

City:

State/Province:

Zip/Postal code: Delivery point: ☐


Country/Region:


Mail route:

Telephone 1:

Telephone 2:


Fax:

Website: 

Email: 

☐ Send email


Classification:

Origination date: 

Sales tax ID:

Federal ID:

State ID:

Master contact: 

Mailing address

Address 1:

Address 2:

City:

State/Province:



Zip/Postal code: Delivery point: ☐

Country/Region:

Mail route:

Attention: ...

License status: Tax status:

Closed date:  Closed date: 

Business activity:

☒ Send paper returns

Alert message:

PIN: 71931

- b. Enter the Business legal name.
- c. Enter the Doing Business As name.
- d. Enter the location of the Business. Include the city, state and zip (this should be in your community).
- e. Enter the ID information collected for the business.
- f. Enter the mailing address of the business.
- g. Set the License Status as Active.

2. Add Owners and Managers as appropriate.

Business: 11

Business Property Owners **Manager** Licenses Taxes Attachments Notes

Name: ...

Address 1:

Address 2:

City:

State/Province:

Zip/Postal code: Delivery point:


Country/Region:

Mail route:

Telephone 1:

Telephone 2:

Fax:

Email: 

3. Add the license information.

Business: 11


Business Property Owners Manager **Licenses** Taxes Attachments Notes


License Number	License Type
5	BREWER TAPROOM


License Billings Attachments User-Defined Notes

License number:

License type: BREWER TAPROOM

License issued date: 

License expiration date: 

Insurance expiration date: 

Status:

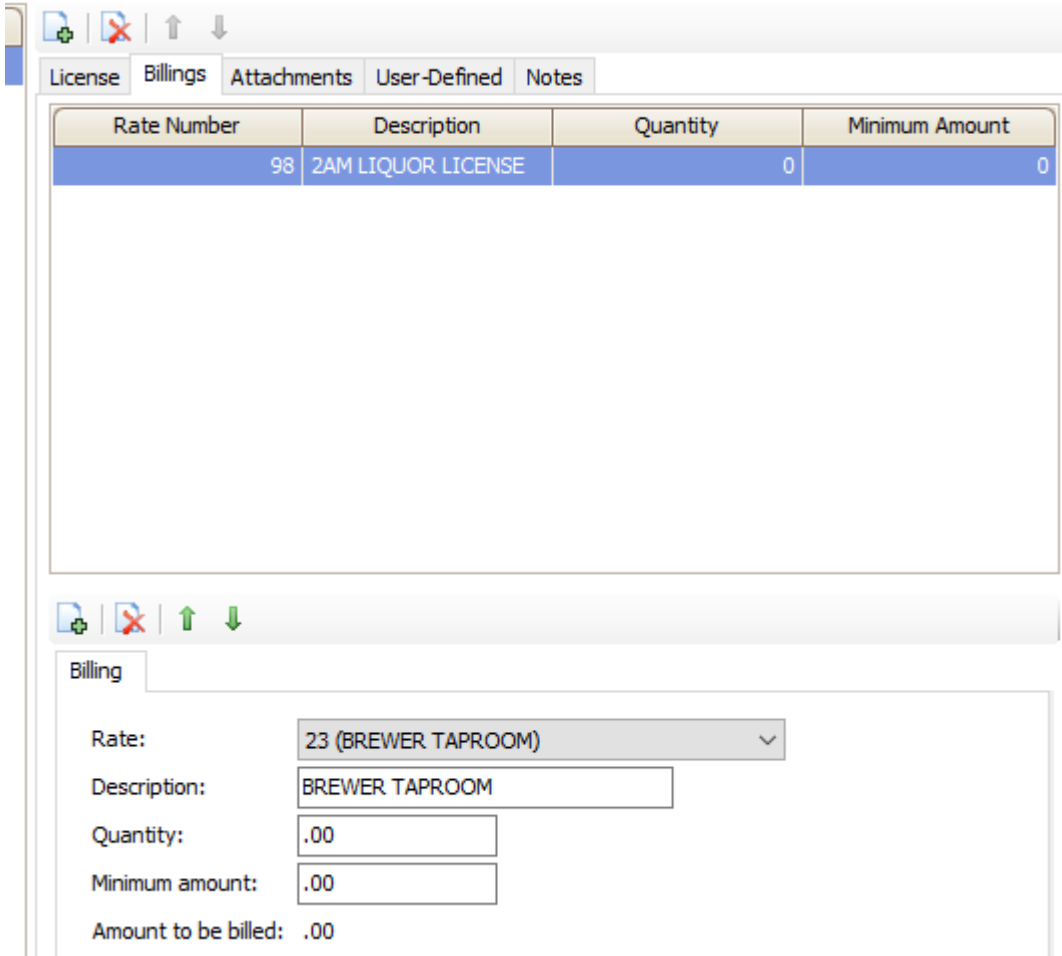
Frequency: Every December 31

License description:

Alert message:

- Enter a license number
- Select the license type\
- Enter the Issue date of the license
- Enter the expiration date of the license (this is the date the license should renew in the following year)
- Verify the Status of the license is Active
- Verify the Frequency the license will renew and the description.
- Verify the rate for the license
- Verify the description of the rate

- i. Verify the Quantity of the license to be issued/billed



Rate Number	Description	Quantity	Minimum Amount
98	2AM LIQUOR LICENSE	0	0

Billing

Rate: 23 (BREWER TAPROOM) ▼

Description: BREWER TAPROOM

Quantity: .00

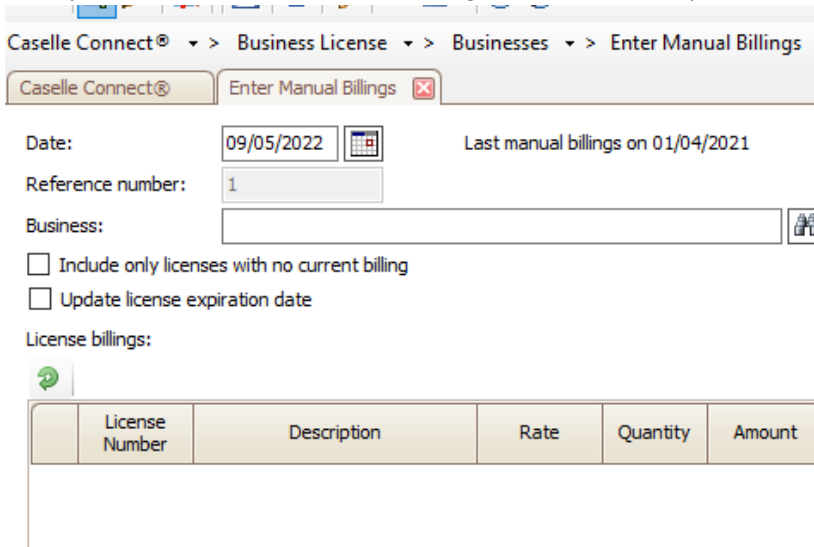
Minimum amount: .00

Amount to be billed: .00

- j. Save the business.

4. Enter the billing for the license.

- a. Go to Business Licenses – Businesses – Enter Manual Billings (some setups will automatically take you to this screen after entering a new business).



Caselle Connect® > Business License > Businesses > Enter Manual Billings

Caselle Connect® Enter Manual Billings

Date: 09/05/2022 Last manual billings on 01/04/2021

Reference number: 1

Business:

☐ Include only licenses with no current billing

☐ Update license expiration date


License billings:

License Number	Description	Rate	Quantity	Amount
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- b. Enter the business name or number.
 - c. Verify the amount to be billed
 - d. Save the billing
5. Print the license by going to Business License – Businesses – Business/License Forms. Select the appropriate report/license and print.
6. Enter the Cash Receipt for the Business.
 - a. Go to Cash Receipting – Payemnts – Enter Payments.
 - b. Select the Business License Category.

Caselle Connect® > Cash Receipting > Payments > Enter Payments


Caselle Connect® Enter Payments X

Payment date: Monday, September 5, 2022 

User: CASSANDRA Worksp


Receipt number: 1.001809 


Category: 1: BUSINESS LICENSES (15) ▼

Customer: SQUEEZE THERAPY 

Distributions

Distribution: 1501: BUSINESS LICENSE ▼

GL account: 888-1-1006 

GL activity: 0 

Job number:

Description: BUSINESS LICENSE

Amount: 500.00

Payments

Customer information

Business number: 7

Business name: SQUEEZE THERAPY

Address: WHISKEY LANE
YOUR CITY MN 53962

Balance due: .00

	Distribution	Cu

- c. Enter the Owner name.
 - d. Verify the amount of the receipt and the type of license.
 - e. Select the appropriate payment type and enter the check number and payor if appropriate.

Renewing Licenses (Processing)

1. Calculate Billings to generate the fees and advance the license dates in bulk. Go to Business License – Businesses – Calculate Billings.
 - a. Verify the Billing Date
 - b. Verify the License Expiration Date Range. This will filter to just renew licenses that expire within the selected timeframe.

- c. Filter the list by License type or business number as needed.

Caselle Connect® > Business License > Businesses > Calculate Billings

Caselle Connect® Enter Payments Calculate Billings

Billing Options Review

☒ Update license expiration dates
☒ Calculate license billings
 Billing date: 09/05/2022 Last billings on 10/01/2021
☐ Send renewal emails
 Print: Report

License expiration
 Beginning date: 09/01/2022
 Ending date: 09/30/2022

License types:

License Type
<input checked="" type="checkbox"/> 2AM LIQUOR LICENSE
<input checked="" type="checkbox"/> BREWER TAPROOM
<input checked="" type="checkbox"/> CLUB ON SALE LIQUOR
<input checked="" type="checkbox"/> HOTEL/MOTEL LICENSE

Selection criteria:

Column	Value
Business.Account number	All

Rates:

Rate
<input checked="" type="checkbox"/> 1 (IN-STATE BACKGROUND CHECK)
<input checked="" type="checkbox"/> 2 (IN-STATE CREDIT CHECK)
<input checked="" type="checkbox"/> 3 (OUT-STATE BACKGROUND CHECK)
<input checked="" type="checkbox"/> 4 (OUT-STATE CREDIT CHECK)
<input checked="" type="checkbox"/> 5 (ON SALE LIQUOR)
<input checked="" type="checkbox"/> 6 (SUNDAY LIQUOR)

2. Print renewal letters to send to business owners. Go to Business Licenses – Businesses – Business License/ Forms. Select your renewal report and print.

Caselle Connect® > Business License > Businesses > Business/License Forms

Caselle Connect® Enter Payments Business/License Forms

Title: Business/License Forms - Renewal Invoice

3. When the owner submits renewal paperwork and pays, enter the Cash Receipt for the Business.
- Go to Cash Receipting – Payemnts – Enter Payments.
 - Select the Business License Category.

Caselle Connect® > Cash Receipting > Payments > Enter Payments

Caselle Connect® Enter Payments

Payment date: Monday, September 5, 2022

User: CASSANDRA Worksp

Receipt number: 1.001809

Category: 1: BUSINESS LICENSES (15)

Customer: SQUEEZE THERAPY

Customer information

Business number: 7
 Business name: SQUEEZE THERAPY
 Address: WHISKEY LANE
 YOUR CITY MN 53962
 Balance due: .00

Distributions

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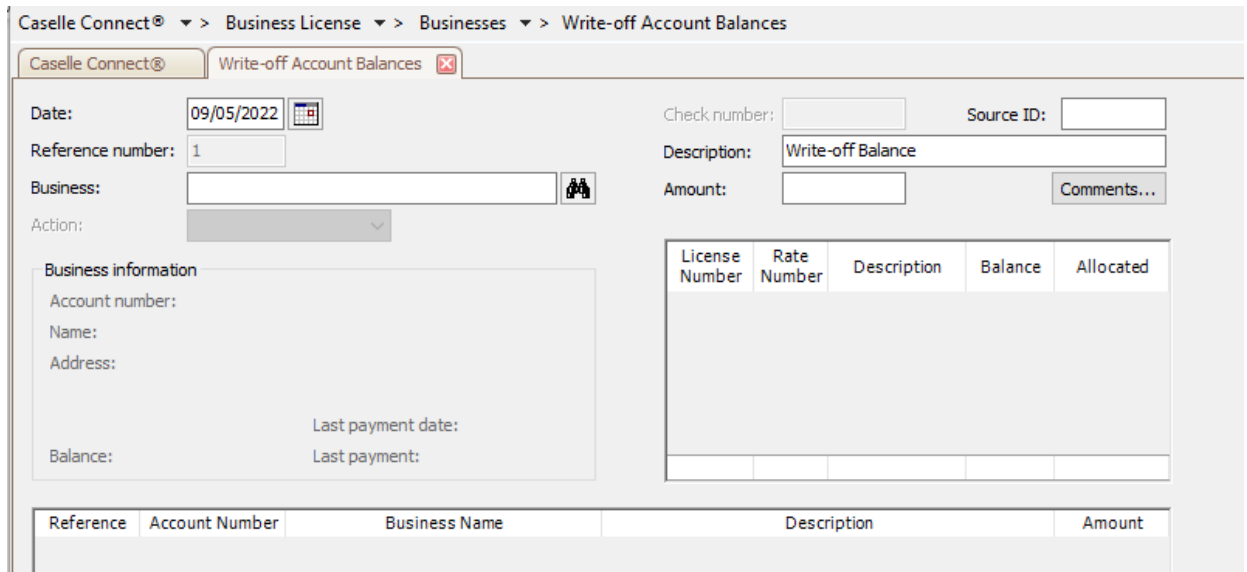
Comments...

Payments

Distribution	Cu
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- c. Enter the Owner name.

- d. Verify the amount of the receipt and the type of license.
- e. Select the appropriate payment type and enter the check number and payor if appropriate.
4. Print the license by going to Business License – Businesses – Business/License Forms. Select the appropriate report/license and print.
5. If the Business does not renew the license.
 - a. Write-Off the outstanding renewal balance. Go to Business License – Businesses – Write-Off Account Balances.



- i. Enter the business number or name.
- ii. Verify the amount of outstanding balance to be written off.
- iii. Allocate the amount to be written off for each license.
- iv. Save the write off transaction
- b. Inactivate the license and or business.
 - i. Go to Business License – Businesses – Modify Existing Businesses.
 - ii. If the Business is closed, change the Business License Status to Closed and enter a closed date.

License status: Closed Tax status: Active

Closed date: 06/01/2021 Closed date:

- iii. Update the license issue and expiration dates to be the prior expiration date (not the renewal date). Change the Status to Closed.

Business: 1 HILLTOP TAVERN Business license status: Closed

License Number	License Type
1A	ON SALE LIQUOR

License number: 1A

License type: ON SALE LIQUOR ON SALE LIQUOR

License issued date: 01/01/2021

License expiration date: 12/31/2021

Insurance expiration date:

Status: Closed

Frequency: Annual Every December 31