

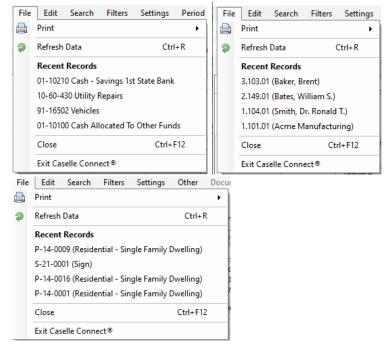
General Tips & Tricks

Navigation Tips & Tricks

- Calendars & Date fields
 - When you need date from the last few days of the previous month or the first few days of the next month when you are on a calendar you can click on the dates that are grayed out without needing to click back a full month.

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- o If you need to get back to Today's date quickly, click the Today box on the Calendar.
- On a date field on a screen with a gray background, the + and keys can be used to go forward
 (+) or backward (-) one day at a time.
- Recent Records
 - From most Inquiry screens, click on the File Menu the last 10 records accessed will be listed under Recent Records. You can click on the record you wish to return to.





- Entry Defaults
 - Entry Defaults are available in the following places: Modify Existing Vendors (AP), Modify Existing Customers (AR), Modify Existing Business (BL), Chart of Accounts (GL), Modify Existing Inventory (MM), Modify Existing Employees (PR), Modify Existing Jobs(PA), Modify Existing Locations (UB), and Modify Existing Customers (UB). Default values can be setup so they will populate automatically when adding a new record.
 - In Modify, go to File > Defaults

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2	Options		۲	ayable 🔹 > Vendors 🔹 > Modify E
Ð	Defaults	Shift+F8		y Modify Existing Vendors 🛛
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	Exit Caselle	Connect®		re

• The screen will clear unless defaults have previously been set.

Caselle Connect®	> Accounts Payable • > Ve	endors 🔹 > Modify	Existing Vendors				
Caselle Connect®	Vendor Inquiry Modify E	Existing Vendors 🔟					
Vendor:						Vendor	
Vendor: 644 -							
Vendor Entry Defa	Its Remittances Recurring Invo	oices Direct Payment	Attachments Use	er-Defined	Notes		
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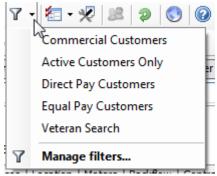
• Enter the defaults for any field, then click save and answer Yes to save the defaults.

Save Defaults		×	
? Okay to s	ave defaults?		
Yes	No	Cancel	

- You can control entry defaults in Accounts Payable's Enter Invoices on a vendor-by-vendor basis. To change the entry defaults, follow these steps:
 - In Accounts Payable, go to Vendors | Modify Existing Vendors.
 - Navigate to the vendor you want to change.
 - Click on the Entry Defaults tab.



- Can set the defaults for Item description, GL account, Department, Terms, Shipping address, Sales tax rate, and Description history.
- Inquiry Filters
 - You have the ability to filter the list of vendors or customers that appear in Vendor Inquiry or Customer Inquiry. Follow this example to create a filter that only shows active customers in Customer Inquiry:
 - In Customer Inquiry, click on the down arrow next to the Filter button on the toolbar.



- Click on Manage filters...
- Click the Add a new filter button.



- Enter a Filter name:.
- Click the Save this filter checkbox.
- Also, click on Set as default if you want this filter to default every time you enter Customer Inquiry.
- Double-click on Column

Column	
15	

- Find Customer.Final bill date in the list. Double-click on this field to move it to the right side of the screen.
- Click OK.
- Double-click on All next to Customer. Final bill date.

Column	Value	
Customer.Final bill date	All	Е
	5	

- Click on Operators and select {is null}.
- Click OK.
- Click OK.

This filter is now available in the drop-down list when you click the down arrow next to the Filter button on the toolbar. You can add as many filters as you want.



Hyperlinks

Blue text indicates a hyperlink to another process

Caselle Connect®	Permit Inquiry 🔯									
Permit:					Permit	~	14	1	of 34	Þ Þi
P-14-0001 Residential - Single Fa <u>Issue permit</u>	amily Dwelling	3150 W Main St Anycity, WI						Balance o Total fee		<u>1,967.17</u> 1,967.17
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Permit Additional Fi	elds Attachments Notes									
Permit number:	P-14-0001			Applica	nt information					
Property:	3150 W Main St			Nam	e: Allen, Lee					
Estimate number:				Addr	ess:					
Permit type:	Residential - Single Family Dwe	ling								

1. Account Payable

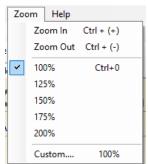
- From Purchase Order Inquiry
 - to Vendor Inquiry using Vendor Name
 - to Invoices using the Invoice Number or
 - to Requisition Inventory using Requisition Number
- From Requisition Inquiry
 - to Vendor Inquiry using Vendor Name
 - to Purchase Order Inquiry using Purchase Order Number
- 2. Animal Licenses
 - From Inquiry
 - to Cash Receipting through Account balance
- 3. Community Development
 - From Permit Inquiry
 - to the next step in the Permit process
 - Examples, approvals, issuing permit, inspections, completing permit
 - to Property Inquiry using Property Address
 - to Cash Receipting using Balance due
 - From Property Inquiry
 - to Cash Receipting from Balance due in Permits or Violations tab
 - to next step in the Permit process from Permits tab
- 4. General Ledger
 - From Account Inquiry
 - to Journal Inquiry using the Journal Code
- 5. Utility Management
 - From Customer Inquiry
 - to Modify Locations from the Location Address
 - to Cash Receipting from Balance Due
 - to Email from the email address
 - to Meter Maintenance from the Meter Number in the Meter tab
 - From Service Order Inquiry
 - to Customer Inquiry from the Customer



Zoom

Zoom is available throughout the system to enlarge the text within Caselle.

• To activate the zoom option, click on the zoom menu at the top and select the zoom percentage or use ctr + or ctrl – to zoom in and out.



• Zoom default can be setup in Security > Setup/Modify User Rights by user as well.

Caselle Connect® 👻	> System Manageme	ent 🔹 > Securi	ty 🔹 > Set	up/Modify User Rights
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Tabs & Split Screens

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Caselle screens can be split by clicking on a tab and dragging it out of the lineup.

When a tab is click & dragged out of the tab lineup an icon will appear that looks like a table and benches. This allows you to pick how you want to split the screen. You can add your tab at the top, bottom left or right depending on which side you highlight.

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strong software, strong community

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If it is dragged to the center, it will go back into the tabs at the top. You can also put it back by double clicking the header when it is a separate window.

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If clicking and dragging is not your thing, you can right click on the tab you want to move and have the option to "Float", to create a "New Horizontal Tab Group" or to create a "New Vertical Tab Group".

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Float will bring the tab out in it's own window.

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The "New Horizontal Tab Group" will put the tab at the bottom of the screen.

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To put the tab back, right click on it and select "Move to Previous Tab Group". Or you can click and drag it to the middle like discussed above. If you double click on it, it will float and then you will need to double click on the header a second time.

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To close a tab, you can either click the is on the tab or right click and select Close from the menu.

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If you have several tabs open and want to close all of them, right click on the tab that you want to remain open and select "Close All But This"

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	Anycity V	VI 88888-0647		Fax:			New Horizontal Tab Group
Vander	weberer Orde	rs Invoices Ch	ada Tatala				New Vertical Tab Group

It will keep the menu tab and the tab you were on open.

Caselle Co	nnect® 🔹 > 🗚	Accounts P	ayable	• > V	endor Inquiry		
Caselle Co	onnect® Ve	endor Inquir	у 🗵				
Vendor:							
100	Ace Lumber 489 Parkway		:			Balance: Contact:	3,2
	PO Box 647 Anycity WI 8	8888-0647				Phone 1: Fax:	555
Vendor	Purchase Orders	Invoices	Checks	Totals	5		



Search Screens

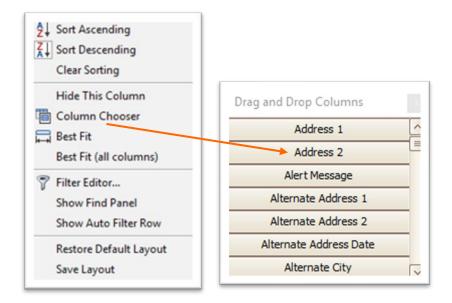
In any inquiry or modify screen, the advanced search can be accessed by clicking on the ^M or pressing F9.

- Type in the search bar, it searches on all fields displayed
 - · Just start typing the wild card is assumed
- Add additional fields

•

- Right click on the header > Select Column Chooser from the menu
 Available fields depend on the quick search that was selected
 - Available fields depend on the quick search that was selected. Example, select Address 1 from the Column Chooser. If the utility uses the Address
 - 1 for additional names, they can now search for the additional names.

å Search					
Enter a search phrase or sele	ct from the list.				Print
Name		Customer Number	Service Address	♥ Final Bill D	ate Ÿ
Smith, Dr. Ronald T.	665 E Parkway	110401	665 E Parkway		Parkw
Richardson, David T.	Marcia Smith	214501	865 Palisades Dr		Palisad
Smith, Judy	555 Oak Hills Dr	215501	555 Oak Hills Dr		Oak H
					/2015 Oak H





Filters can be used to refine your search as well.

Hover over the column header and click the filter icon that appears in the upper right corner.



Once the search criteria gives the results needed, the results can be printed by clicking the Print button next to the search field.

Print	
Philit	

3/15/2021			Sear	rcn:				Page:
Name	Cosigner	Customer Number		Service Address	Final Bill Date		Street	
Anycity School District - High School	ABC Managem	217101	1617 S Lake Rd			Lake Rd		
Anycity School District - Middle School	ABC Managem	217201	1837 5 Lake Rd			Lake Rd		
Anycity School District - Elementary	ABC Managem	217301	1875 S Lake Rd			Lake Rd		



Printing/Print Preview

When you choose print from the search screens or print preview any report, the preview screen comes up.

Preview							_ 0
File View Background							
ii 00 💐 🗁 🗎 🤗	🖶 🕞 🗆 🖳	· 🖑 🔍 🍭 100% 🖂 I	0 1 1		🗜 • 🖗 • 🔟 • 🖂 • 🔛 •		
·····	9/8/2022 Vendor Number	Name	Vendor Type	Rating	Search:	Page: 1	
		Postmaster	Normal	Rating			
		State Bank Card	Normal	U			
		State League of Cities & Towns	Normal				
		State Retirement Systems	Normal	U			
		State Water Quality Division	Normal	U U			
		Workers Compensation Fund	Normal	U			
				-			

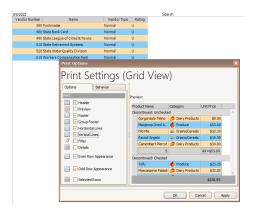
There are many things that you can do from the preview screen.

Buttons	Title	Functionality
	Thumbnails	Shows a thumbnail of each page in a panel on the left
00	Search	To search the document.
题	Print Options *	To change option & behavior settings for the print out.
	Open	To open saved preview files (*.prnx)
	Save As	To save a preview as a *.prnx file
P	Print	To select a specific printer
e	Quick Print	To print to the default printer
Cy .	Page Setup	To change paper size, orientation and margins
	Header and Footer	To modify the Header and/or Footer of the report
-	Scaling	To adjust the report by percentage or pages wide
57	Hand Tool	
9	Magnifier	To magnify the report
2 100% 🗸 🔍	Zoom	Zoom in or out on the report
	Previous, Next, First or Last	To move around in the report a page at a time or go to the beginning or end
	Multiple Pages	To display more than one page
∞ -	Color	To add color to the background of the page
	Watermark	To add a watermark to the report (either text or a picture



PDF File HTML File MHT File RTF File DOCX File XLS File SUSY File Text File Image File	Export Document	To save the document as one of the 10 file types listed
✓ PDF File MH1T File RTF File DOCX File XLS File XLSX File CSV File Text File Image File	Send via Email	To send the document as one of the 9 file types listed
× •	Exit	To close the preview

*Print Options





Setup/Modify a Checklist

Use the toolbar to add a new checklist or modify an existing one. The following provides a guide to using the toolbar:

Button	Functionality
Create a New Item Create a New Checklist Create a New Group Create a New Task 	 The Create a New Item button allows for the following items to be added. 1. Creates a completely new checklist. 2. Creates a new grouping within the selected checklist. 3. Creates a new task within the selected group or checklist.
 Delete the Selected Item 1. Delete the Selected Checklist 2. Delete the Selected Group 3. Delete the Selected Task 	 The Delete the Selected Item button allows for the following items to be removed. 1. Deletes the selected checklist and all items within it. 2. Deletes the selected grouping and all items within it. 3. Deletes the selected task.
Copy the Selected Item	The Copy the Selected Item allows for a task, group or even entire checklist to be copied. The new item will have the same name with the pretext "Copy of". This button allows you to add multiple checklists to your checklist
My View List Remove the Selected Checklist from My View List	selection box. When you have multiple checklists you can navigate between any that have been included in your view list. This button allows you to remove a checklist from your view list. If the checklist is being used by another user or you do not want to delete it, this option is useful to remove additional checklist from your view list.



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Set the Selected Checklist as My Default	This button allows you to select which of your checklist you would like to be defaulted into your view list selection and therefore viewable when you open your checklist. The checklist on the right will have a checkmark on the clipboard icon when it is designated as the default. If the checklist selected to be a default is not included in your view list it will be added.
--	--

Button	Functionality
Move the Selected Group (or Task) Up/Down	These buttons allow you to move a selected group or task within a particular checklist. The grid to the right will help you keep track of where the item has been saved.
Export the Selected Checklist	This button allows you to export a checklist. You can export checklists to save them as a backup or share them with other Caselle users outside your organization.
Import a Checklist 🗦	This button allows you to import a saved checklist. Import a checklist that has been backed up or created by a user from another organization.

Groups

Tasks on a checklist should be grouped according to the frequency that they should be completed. Use the Group section to determine the frequency for the tasks included within the group. Create a frequency that is daily, weekly, monthly, yearly, or on a special date such as a check issue or period end date.

Tasks

Use the Task section to describe a task or setup an action that should occur when clicking on the task.

- The description should give a clear direction of what the task is. For additional information, the notes section can be filled out.
- Designate if the task is required or not. All required task within a group must be completed before the group will proceed to the next due date.
- Designate if click on the task will open a routine within Clarity, launch another program, or just be for information only. **Checklist Sharing**



Need for a group of users to share a checklist or just want to pass the responsibilities onto someone else? Use the Share with All Users button to designate who can see what checklists and if they can edit them.

- Unselect the Share this Checklist with All Users checkbox to designate specific users
- Use the grid of users to designate which users will share the checklist and which will have the ability to modify
- If you are sharing the checklist with all users, you can also select to allow all users to be able to modify it



Favorites

Favorite can be used like bookmarks in internet browsers. When you are on a tab that you want to have a shortcut for, hover over the Favorites tab and click the star $\frac{1}{2}$ to add.

	🚔 • 🔯 🗟 ♈ • 🚈 • 🧶 🤅 • • > Accounts Payable • > Vendor I				
Caselle Connect®	Vendor Inquiry 🗵				Favorites
endor:			1	Vendor	Add Vendor Inquiry to Favorites
PO Any	9 Parkway Unit # 3 Box 647 ycity WI 88888-0647 = Orders Invoices Checks Totals	Balance: 3,286.87 Contact: Phone 1: 555-4449 Fax:			
		ecurring Invoices Direct Payment Attachmer	nts Notes		

As you add to Favorites, the list of shortcuts will grow:



You can use the up and down arrow keys to put your favorite in the order you prefer.

You can remove shortcut from your Favorites by clicking the Star for the tab you are on or clicking the X.



Active Tasks

The third tab on the right is the Active Tasks. If you like to keep all the tabs you use during the day open, Active Tasks will allow you to go to any tab whether they are showing on the top or not.

If you have more tabs open than will fit in the window, arrow keys will appear on the right side.

lose 👫 📑 🚔 - 🔯 🏹 - 🚈 - 👂 🞯 😡				
aselle Connect® • > Human Resources • > Job Posting Inquiry				
Vendor Inquiry Employee Inquiry Account Inquiry Journal Inquir	y Inquiry Asset Inquir	y Receipt Inquiry	Employee Inquiry	Applicant Ir 💌 < >
leference:		Reference	✓ ▲ ▲ 1	of 2 🕨 🕨
lob posting: Building Inspector-Bld, Building Inspection (BI 100) osition type: Full time lob Description Applicants Additional Information Attachments Notes	Opened date: 03/30/201 Closed date: 08/29/201 Filled date:		Positions opened: 1 Positions filled: 0	
Name	Gender	Ethnicity	City	Telephone 1
Black, Lane	Male			(385) 555-3205
Ellison, Ray	Male		Anycity	(385) 555-5510
McNeil, Annie	Female		Anycity	(385) 555-4785

These can be used to move through the tabs, but using Active Tasks will help you find the task you want quicker.

	ch Filters Setting		agement Zoom	<u>H</u> elp					
	-> Human Resource		Inquiry						
Vendor Inquiry	Employee Inquiry	Account Inquiry	Journal Inquiry	Inquiry	Asset Inqui	iry	Receipt	Active Tasks	1
Reference:						Refer	ence	Caselle Connect®	P Checklist
Job posting: Buildir	ng Inspector-Bld, Buildin	a Toppostion (PI 100)		Opened date	02/20/20	15		Caselle Connect®	ecki
Position type: Full ti		g inspection (bi too)		Closed date:				Accounts Payable	1 St
				Filled date:				Vendor Inquiry	
Job Description App	licants Additional Infor	rmation Attachments	Notes					Accounts Receivable	Adt
	N	lame		Ge	nder		Ethnicit	Inquiry	Active Tasks
Black, Lane				Male				Asset Management	ask
Ellison, Ray				Male				Asset Inquiry	
McNeil, Annie				Female				Cash Receipting	1
								Receipt Inquiry	Tak
								General Ledger	X Favorites
								Account Inquiry	L S
Applicant Task List	s Tests Qualification	ns References Note	es					Journal Inquiry	
Ranking:	0							Human Resources	
Application date:	03/30/2015							Applicant Inquiry	
	date: 04/13/2015							Job Posting Inquiry	
Interview date:	04/22/2015							Payroll	
Available date: Reply date:	04/29/2015 04/18/2015							Employee Inquiry	
Desired wage:	04/18/2015							Timekeeping	
Status:								Employee Inquiry	
								Utility Management	
								Customer Inquiry	
								Customer Inquiry	



Reports

Default Reports:

The report that is used most often can be set as the default report. In the new style reports click the options icon ¹/₂ and select the report from the Default report dropdown list. Click OK and click Save for the entire organization.

E Options	×	
Default filter: Default report: <u>H</u> elp	All Aging Report - Demo Aging Report - Aimee's Report Aging Report - Demo Aging Report - by Collection Code [Caselle Master] Aging Report - by Coustomer Name [Caselle Master] Aging Report - by Customer Number [Caselle Master]	Save Options ×
2 Options	Nalud uction r. p. contoning unumber [concurring/conton]	Save them for me only
Default filter:	All 🗸	
Default report:	Aging Report - Demo 🗸	Cancel
Help	OK Cancel	

For the old style reports, have the report displayed in the Title box and check the box Default report:

Casell	e Connect®	Accounts Receivable by Service	Aging Report	Billing Exception Report
Title:	Accounts Receiva	able by Service Report - by Custome	r Number [Caselle Master]	✓ □ Default report

Report Filters & Default Filters:

As your utility gets more and more reports setup, you may want to create a filter to filter out the specific reports that you use for report.

To setup a filter, click on the filter icon and Manage Filters will open:



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File Edit Filters Settings Zoom Help		
Close 🛃 📡 🔚 🗈 🚉 🍠 🍸 🖅 - 🞯 🧐		
Caselle Connect® • > Utility Management • > Reports • > Meter Re	ading Exception Report	
Caselle Connect® Meter Reading Exception Report		
Definition: Meter Reading Exception Report - by Customer Number [Caselle Mas	ter]	🏹 📢 🖣 1 of 2
Report Options Y Manage Filters		×
Report dates		
Filter name:		
Consecutive Reports		
To: 07	Filter name: Consecutive Reports	\sim
Check 2	Report definitions:	
Include on	Definition	Last Processed
Exceptions to	Meter Reading Exception Report - 3 Consecutive Period No U	
Active v	Meter Reading Exception Report - by Customer Number [Cas	06/08/2022
Active v	Meter Reading Exception Report - by Read Route [Caselle M	
	Meter Reading Exception Report - Consecutive Estimates	
Exact si	Meter Reading Exception Report - Estimated Reads	06/08/2022
Meter w	Meter Reading Exception Report - High Low Report	05/17/2022
Meter a		06/07/2022
	Meter Reading Exception Report - No Reads - Inactive with U	
		06/07/2022
	Meter Reading Exception Report - Rollovers	06/07/2022
MAI MAI		
Meter u Help		OK Cancel

Enter the name of the filter and check the boxes before the reports you want to see. You can filter by type of report or use your name to identify they are the reports you use.

File Edit Filters	Settings Zoom Help								
Close 🔒 📡 🔚	1 🔒 🗟 🍠 🍸 🔁 - 🞯 🚱								
Caselle Connect® + >	Utility Management + > Reports + > Meter Reading Ex	ception R	eport						
Caselle Connect®	Meter Reading Exception Report								
Definition: Meter Read	ing Exception Report - No Reads - Inactive with Usage - Water		~	Filter:	All	~ 🏹 🚺	4 6	of 10	► N
Report Options Additio	𝔥 Manage Filters								×
Report dates	Filter name:								
From: 04/02/202	Consecutive Reports	🔓 🔀							
To: 07/01/202	Variance Reports - Therese	Filter na	me: Varia	ance Rep	orts - Therese		\sim		
Check 2 cons		Report	definitions:		Definition		Last Pro	ronged	
Include only period			Aeter Read	ina Exce	ption Report - 3 Consecutiv	e Period No LL		cesseu	
Exceptions to check for				_	ption Report - by Customer				
Active with no re			leter Read	ing Exce	ption Report - by Read Rou	te [Caselle M			
Active with no u			leter Read	ing Exce	ption Report - Consecutive	Estimates			
Inactive with use			leter Read	ing Exce	ption Report - Estimated Re	ads	06/08/2022		
Exact same usag				-	ption Report - High Low Rep		05/17/2022		
Meter with a reg				-	ption Report - No Consump		06/07/2022		
Meter activity w				-	ption Report - No Reads - I				
				-	ption Report - No Reads - S	ewer Deduct	06/07/2022		
COMPUTER			leter Read	ing Exce	ption Report - Rollovers		06/07/2022		
MANUAL ES									
Meter usage out	Help						OK	Cano	cel

Once you have filters setup, you can setup a default filter by clicking on Options and selecting the filter you want to use.



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File Edit Filters Settings Zoom Help		
Close 🔓 📡 🔚 1 🚔 🗟 🍠 🍞 🚈 🗸 🎯 🔞		
Caselle Connect® 🔹 > Utility Management 🔹 > Reports 🔹 > Meter Reading	J Exception Report	
Caselle Connect® Meter Reading Exception Report		
Definition: Meter Reading Exception Report - No Reads - Inactive with Usage - Water	✓ Filter: ,	All 🗸 🗸
Report Options Additional Options Columns Print Setti		×
	Masters titve Reports Reports - Therese	
2 Options	×	
Default filter: Variance Reports - Therese	~	
Default report: Meter Reading Exception Report - No	Reads - Inactive with Usage $$	
Help	OK Cancel	

This is one of the rare times we recommend that you "Save them for me only"

🔚 Save	e Options	×
How do	you want to save these options?	
	Save them for the entire organization	
2	Save them for me only	
	Cancel	

Drill Down Capability

The new style reports have drill down capability if the reports are previewed. If the report lists customers, click on the customer number or name to go to Customer Inquiry. If the report is made up of different totals, clicking on a total will bring up a second report to show what customers made up that total.

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Anycity Corpora	ation				Da	Transaction Su ates: 04/01/2020 -	-					Page: Sep 14, 2020 11:30AM
Suppressing		ansactions	ntract Adjustment	, Contract Billing	, Deposit Applied,	Interest Applied,	Payment, Paymer	nt Adjustment, Re	allocation, Transf	ier, Write Off		
Date	Billing	Billing Adjustment	Contract Adjustment	Contract Billing	Deposit Applied	Interest Applied	Payment	Payment Adjustment	Reallocation	Transfer	Write Off	Balance
03/31/2020												3,068.29
04/02/2020	42.55	-	-	-	100.00-	8.33-	-	-	-	-	-	3.002.51
04/03/2020		-	-	-	-	-	191.61-	-	-	-	-	2,810.90
04/15/2020	40.00	-	-	-	-	-	-	-	-	-	-	2,850.90
04/20/2020		-	-	-	-	-	-	100.46	-	-	-	2,951.36
04/29/2020	-	30.00-	-	-	-	-	-	-	-	-	-	2,921.36
04/30/2020	59.30	-	-	-	-	-	34.46-	-	-	-	-	2,946.20
Grand To	tals:											
=	141.85	30.00-	-	-	100.00-	8.33-	226.07-	100.46		-		2,946.20
Anycity Corporation	1	Tran	saction Register - SYS Dates: 04/15	TEM STATUS REPC 2020 - 04/15/2020	RT DAILY	S	Page: 1 ep 14, 2020 11:394M					
Report Criteria: Selected types:	Billing											
Billing												
04/15/2020												
	Name		Customer Number	Туре	Refe Nun	rence hiber		Description		Source ID	Check Number	Amount Msg Service
Allan, Cynthia			2.153.01 Billin	9		2 Manual Billing						15.00 M NSF - 14
Bates, William S.	V		2.149.01 Billin	9		1						25.00 M Misc - 13
Total 04/15/2	2020:	_	430202								_	40.00
Total Billing:			430202									40.00
Grand Totals:	:	_	430202								_	40.00
Report Criteria Selected types:	0.1										_	



Creating User Defined Fields

User Defined Fields (UDF) can be added to any table in any application. They are used when you want to track or report on information that does not already exist in the table.

User Defined Fields are added in Organization > Organization on the User-Defined tab in all applications.

When a UDF is added

- Select the table to add the field to
- Enter the name of the field. The name must be unique and cannot be the same as an existing field in the system.
- Select the Type
 - There are 4 types of fields that can be added.
 - Date

ertification Conserv	vation Stock Certificates Interfaces Notifications Passwords Tracking	User-Defined	No
	Setup New User-Defined Field	×	
Renter			_
Work Phone	Table: Meter 🗸		
Contact Name	Name: Test Date		
Veteran	Type: Date V		
Senior Citizen			
Employer	Validation		
Paperless Bill?	Mask: MM/dd/yyyy e.g. 09/08/2022		
Property tax ID	Beginning range:		
Buffalo Box	Ending range:		
Purchase Date			
EMR Date	Default value:		
Battery Date	Allow blank dates		
Scrap Date			
Test Date			
High Test Read			
Low Test Read			

Number

er Re	ading Exception	Report	Orga	nization 🔯					
Pay	Certification	Conserva	tion Sto	ck Certificate	Interfaces	Notifications	Passwords	Tracking	User-Defi
			🕞 Setu	p New User	-Defined Field				×
	Renter								
	Work Phor	ne	Table:	Meter				`	/
	Contact N	lame	Name:	BLOC					_
	Veteran		Type:	Number >	/				
	Senior Citi	izen							
	Employer		Validati	on .					
	Paperless	Bill?	Mask:		###,###,##	#,###;-###,	###,##; e	g. 1,234,5	68
	Property t		Beginni	ng range:					
	Buffalo Bo	x	Ending			_			
	Purchase I	Date	-	-		_			
	EMR Date		Default	value:					
	Battery Da	ate							
	Scrap Date	e							
	Test Date								
	High Test	Read							
	Low Test F	Read							
	Read Free	uency							



Text

Field Renter	Setup New User-Defined Field
Work Phone Contact Name Veteran Senior Citizen Employer Paperless Bill? Property tax ID Buffalo Box Purchase Date EMR. Date Battery Date Scrap Date Test Date High Test Read	Table: Customer Name: Sort Code Type: Text Validation Length: 1 Additional validation: Self validating Add Value Specific values only Set Default Remove Value Default value:

Text fields can have validation

- None means it's a free form field. You can enter anything you want.
- Self-Validating means you can enter any text you want and it will be available to pick from the list in the future.
- Specific values mean you enter the only values allowed in a pick list
- Yes/No

Leading Exception Report Organizatio	on 🔟						
V Certification Conservation Stock Cer	tificates	Interfaces	Notifications	Passwords	Tracking	User-Defined	Notes
Field	🕞 Setu	n New Use	er-Defined Fie	ld			
				-			
Work Phone	Table:	Customer					\sim
Contact Name	Name:	Email Bill					
Veteran			_				
Senior Citizen	Type:	Yes/No	\sim				
Employer							
Paperless Bill?							
Property tax ID							
Buffalo Box							
Purchase Date							
EMR Date							
Battery Date							
Scrap Date							
Test Date							
High Test Read							
Low Test Read							
Read Frequency							



Deleting History

Occasionally you will want to delete history from prior to your retention period. All applications have retention period setup in Organization > Organization. Depending on the application, the retention period may be days, months or years. All history or just certain detail like payment detail or expired licenses

Keep X years of history: Caselle Connect® + > Accounts Payable + > Organization + > Organization Caselle Connect® Vendor Inquiry Meter Reading Exception Report Organization 🗵 General Interfaces Purchase Orders Override Users Direct Payment Passwords Tracking User-Defined Notes Primary name: Anycity Corporation Employer ID: 87-0001111 Keep 2 years of history Secondary name: Accounts Payable Asset Management **Business Licenses Business Tax Collection** Human Resources – Payroll history Materials Management Payroll Project Accounting Timekeeping Keep X months of history: Caselle Connect® + > Accounts Receivable + > Organization + > Organization Caselle Connect® Vendor Inquiry Meter Reading Exception Report Organization Organization 🔀 Organization Interfaces Passwords Tracking User-Defined Notes Primary name: Anycity Corporation Customer number format: ##### Keep 24 months of history Secondary name: Accounts Receivable **Backflow Management** Keep expired licenses for X months Caselle Connect® -> Animal License -> Organization -> Organization Caselle Connect® Organization 🔯 Organization Passwords Tracking User-Defined Notes Anycity Corporation Keep expired licenses for 0 months Primary name: **Animal License Community Development** Maintenance Orders



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Keep payment detail X days Caselle Connect® > Cash Receipting * > Organization Caselle Connect® Organization
Organization Interfaces Passwords Tracking User-Defined Notes
Primary name: Anycity Corporation Keep payment detail 186 days
Cash Receipting
Check on Demand
Human Resources – Applicant history
General Ledger – Years of detail, period summary or annual summary Transaction history
Years of detail: 2
Years of period summary: 3
Years of annual summary: 5
Budget history
Years of detail: 2
Years of period summary: 3
Years of annual summary: 5
Utility Management – Keep X Periods
Delete account history after 24 periods
Delete meter/service order history after 24 periods

Deleting History tasks are commonly found in the Organization Miscellaneous Menu. Although they can be found in other menus, for example Delete Inactive Customers in Accounts Receivable and Utility Management is in the Customer Menu.

The Delete History function will use the retention period in Organization to default the date to "delete records dated on or before:" DO NOT CHANGE THIS DATE unless it is to a date prior to the date listed.

Delete history functions will also allow you to add some selection criteria to limit the history being deleted.

You can normally select Print Report Only to get a list of what will be deleted without actually deleting anything. When you want to run the Delete, uncheck that box.

Delete history functions will not allow you to delete active records.

NOTE: ALWAYS MAKE A CURRENT BACKUP BEFORE RUNNING A DELETE HISTORY PROCESS!

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Example:

<u>File Z</u> oom <u>H</u> elp										
Close 🐻 🔲 🛃 😨 🕅 🦞 🕅 🧐 🕅 🖓 🕅 Caselle Connect® 💌 > Accounts Receivab	la – S. Custanara – S. D.	-late las ative Cost								
Caselle Connect	ole • > Customers • > D	elete inactive Cust	omers							
Organization Organization Organi	zation Organization	Organization	Organization	Delete History	Delete Inactive Customers 🔯					
Make sure you have a current l	backup before proceeding.									
Use this routine to delete customers w	ho meet the following criteria:									
	-									
 Termination date is on or before the Customer balance is zero 	e date entered									
 Customer has no transactions after 	the date entered									
Customer has no open deposits										
Delete customers with no activity since: 09/08	8/2020									
Print report only										
Selection criteria:										
Column	Value									
Customer.Customer number	All									
<		>								
<		>								

Need more help? Civic Support Line: 888-241-1517