CAI
INFORMATION
SYSTEMS SOLUTIONS

COMPUTER ARTS, INC.

# Recording System

USER'S MANUAL

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# Table of Contents

# CHAPTER ONE

## Getting Started

Before you begin to use the Recording System, it is important to become familiar with its functions and to understand the terminology and standards used in this manual.

**Introduction to Recording**

The Computer Arts County Recording System was developed for counties to track recorded documents or "instruments", enter cash transactions, and produce and manage marriage and liquor licenses as well as catering permits.

The Recording System consists of a Main Menu designed for the majority of users and a Control Menu designed for control setting s of the program. The system provides a means for establishing categorization codes and setting system-wide control options, while the Main Menu focuses on day-to-day transactions like adding instruments and cash transactions.

Included in the Recording System is a powerful interface for reporting, the program comes with a suite of reports created so that when you select a report, you have the ability to preview on the screen prior to printing or saving. Export options for reports include a variety of formats in clouding .pdf, MS Word and MS Excel formats. Filter windows enable the user to select a range of records based on date, type and other applicable data fields.

Computer Arts, Inc. provides technical assistance on the Recording System. For more information please the chapter pertaining to Technical Support found in this manual.

# CHAPTER TWO

## Working with
## Instruments

**Listing and Displaying Instruments**



To display a list of instruments, click the List Instruments icon from the toolbar.  From this screen you can add new instruments, locate and display instruments, and print reports as described below.  Lien instruments, which have been released by other referred instruments, will be displayed in yellow.  Also, instruments which have been referred to, or referred by other instruments will have check marks in the *Refers To* or *Refers By* columns.

To exit the **List Instrument** window, click the Close button.  This will close the **List Instrument** window and return to the **Recording Main Menu.**

**Displaying an Instrument**

To display information for an instrument from the **List Instrument** window, click on the desired row and press F8 or click Process/Display or double-click the desired row.

Details for an instrument can also be displayed by click the Display icon after selecting the desired instrument record.
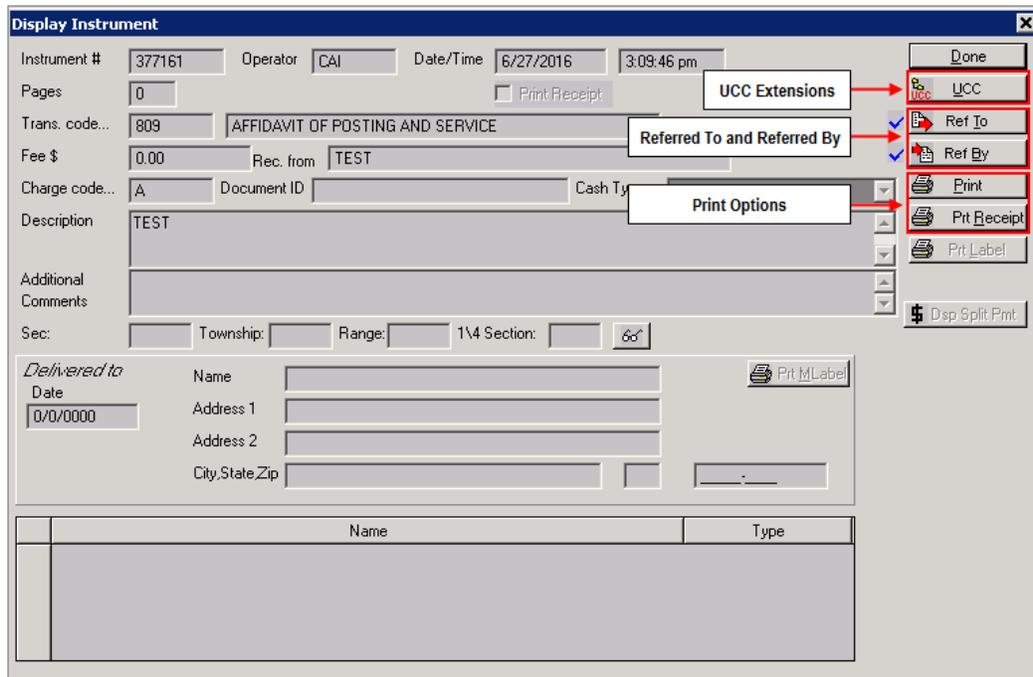
From the **Display Instrument** window, select on any of the available buttons to work with UCC extensions, referred instruments, or to print instrument details or a receipt. See instructions on the functions below.

**Adding New or Old Instruments**

1. Click the List Instruments toolbar button. The **List Instrument** window will display.

2. Click Add or press the F6 function key to add a new instrument, or click Enter Old Instruments to add an old instrument. You can also select either Add or the Enter Old Instruments option from the PROCESS menu or the right click menu.

3. Enter all applicable information for the instrument. At a minimum, *transaction code* must be entered. See description for each field below.

4. Click the Add button. If the transaction code entered is for a UCC instrument, the **Add UCC** window will display. See instruction for entering UCC information found under *Adding UCC Extensions to an Instrument* later in the chapter.

**Instrument Fields**

Below are descriptions of data fields you will need to become familiar with when adding a new or old instrument. Some of these fields may not be required or may already be filled in for you, depending on the particular instrument you are adding and defaults set up in the Control File.

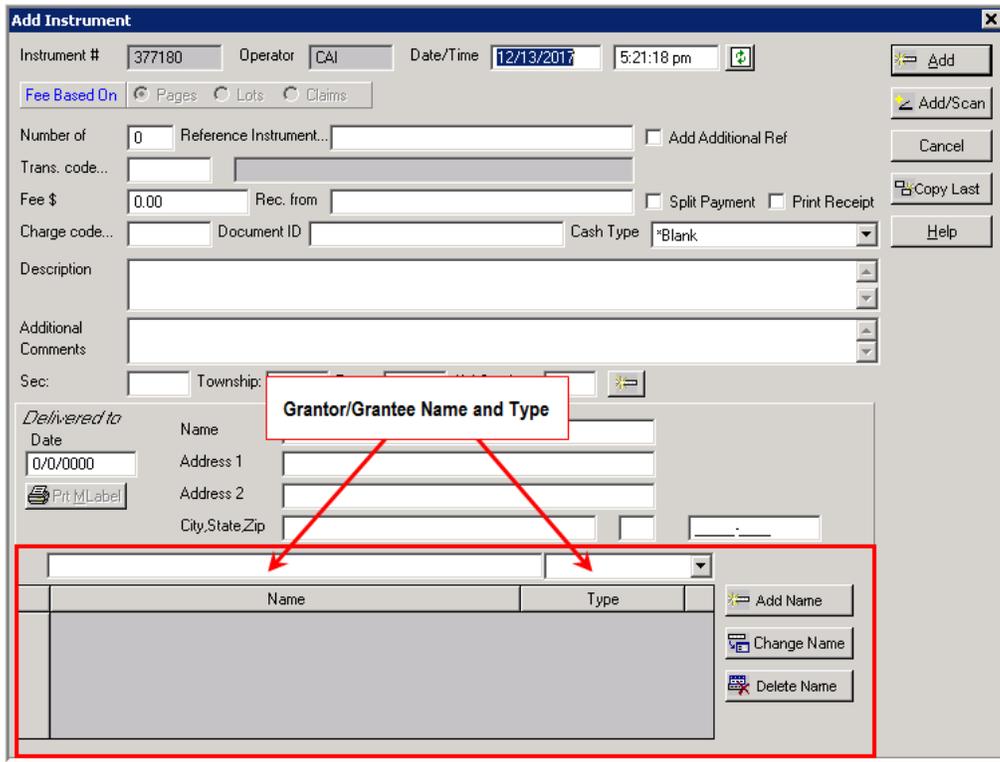| | |
|---|---|
| *Instrument #* | Instruments are sequentially numbered documents recorded at a County Clerk's office. The instrument number (required field) automatically defaults to the |

next sequential number unless you're adding an instrument through the ADD OLD instrument icon, in which case you enter a value up to 30 characters for the instrument number.  This will validate against existing instruments.

*Operator*                          The Operator user ID (required field) defaults to the user ID you used when logging into the Recording System.

*Date/Time*                         The instrument date (required field) default to the current date.  You can manually change the date if needed.  The date format (MM/DD/YYYY, etc.) defaults from the Regional Setting in Windows. Instrument time (required field) defaults to the current time.  You can manually change the time if needed.

*Pages*                             The number of pages in the instrument entered as a whole number.  The number of pages is multiplied by the default fee on the cash code to calculate the instrument fee.

*Reference Instrument…*             You can enter one "Referred To" instrument number here.  Additional referred instruments can be added through the display of refers-to functions.  You can double click this field or press the F4 function key to display and select from a list of instrument numbers.

*Print Receipt*                     Check the box by this field if you want the system to automatically print a receipt as soon as the instrument is added.  This will default to the setting specified in the Control File but can be changed here.

*Trans. Code…*                      The transaction code (required field) is also referred to as "instrument type" in the Recording System.  To view and select from a list of instrument types, click this field and press the F4 function key or double-click on the field.  The default fee amount from the cash coddle associated with the instrument type is used in calculating the instrument fee.

The instrument type description appears here automatically once you have selected an instrument type.  You cannot change the instrument type description here.  The description must be changed through the **Recording Control Menu.**

| | |
|---|---|
| *Fee $* | The instrument fee is the total charge for the recording of this instrument. It is calculated as the number of pages multiplied by the default fee amount on the cash code associated with the instrument type. |
| *Rec. from* | The name of the person from whom the fee was received. |
| *Charge Code…* | If an instrument fee is going to be charged rather than paid in cash, enter the appropriate charge code in this field. To view and select from a list of values, position your cursor on the field and press the F4 function key or double-click on the field. |
| *Document ID* | An optional field that can be used to enter any document ID associated with the instrument. |
| *Cash Type* | The method of payment made for the recording of this instrument. To view and select from a list of valid entries, click on the arrow to the right of the field. Valid entries are *Cash, Charge, Check, Coin, Other, Money Order, Credit Card, ACH Transfer or IRS ACH Transfer.* |
| *Description* | Enter descriptive information about the instrument in this field (up to 140 characters). |
| *Additional Comments* | Enter additional comments about the instrument in this field (up to 2590 characters). |
| *Section/Township/Range/Quarter* | Location requirements associated with instrument. |
| *Delivered to Date* | The date the instrument was delivered. |
| *Delivered to Name…* | The name of the person or company to which the instrument was delivered. This is a search filed so you can double-click on tis filed or use the F4 function key to display and select from previously entered names. If the name you enter here has not been entered before, it will be added to the "delivered to" name search. |
| *Address* | The address of the person or company to which the instrument as delivered. |
| *City, State, Zip* | The city, state and zip code of the person or company to which the instrument was delivered. |
| *Grantees, Grantors* | Enter the names of grantees/grantors (see further instructions below). At least one grantor must be entered before the system will allow you to add an instrument |

## WORKING WITH GRANTORS AND GRANTEES

You can enter an unlimited number of grantees and grantors for a particular instrument. At least one grantor must be entered for each instrument. If no grantee is entered, a warning message will be displayed to make sure you wish to continue. If there is no grantee for the instrument, click Yes; otherwise, click No or Cancel and add the grantee name.



**Adding Grantees and Grantors**

Type the name of the *gratee* or *grantor*. For consistenc and easer in searcing, enter the name *last name first* (i.e. Johnson, William R.).

Select the appropiate *type* (grantor or grantee) for the name entered. You can also type eith an "E" for greantee or an "R" for grantor in this field.

Click the Add Name button and continue adding grantees/grantors, if necessary. Click the Add button when all grantees and grantros have been entered.

**Deleting or Changing Grantees and Grantors**

If you enter the name of a *granteee* or *grantor* by nistake, you can remove it by clicking on the name and then clicking the Delete Name button. If you need to correct an erro in spelling, click on the misspelled name, click Change Name button and keyin any necessary changes on the Change Grantee-Grantor screen.

**Working with Referred Instruments**

**Referred – To**

You can link to ne or more additional instrumet by using the Refers To function.
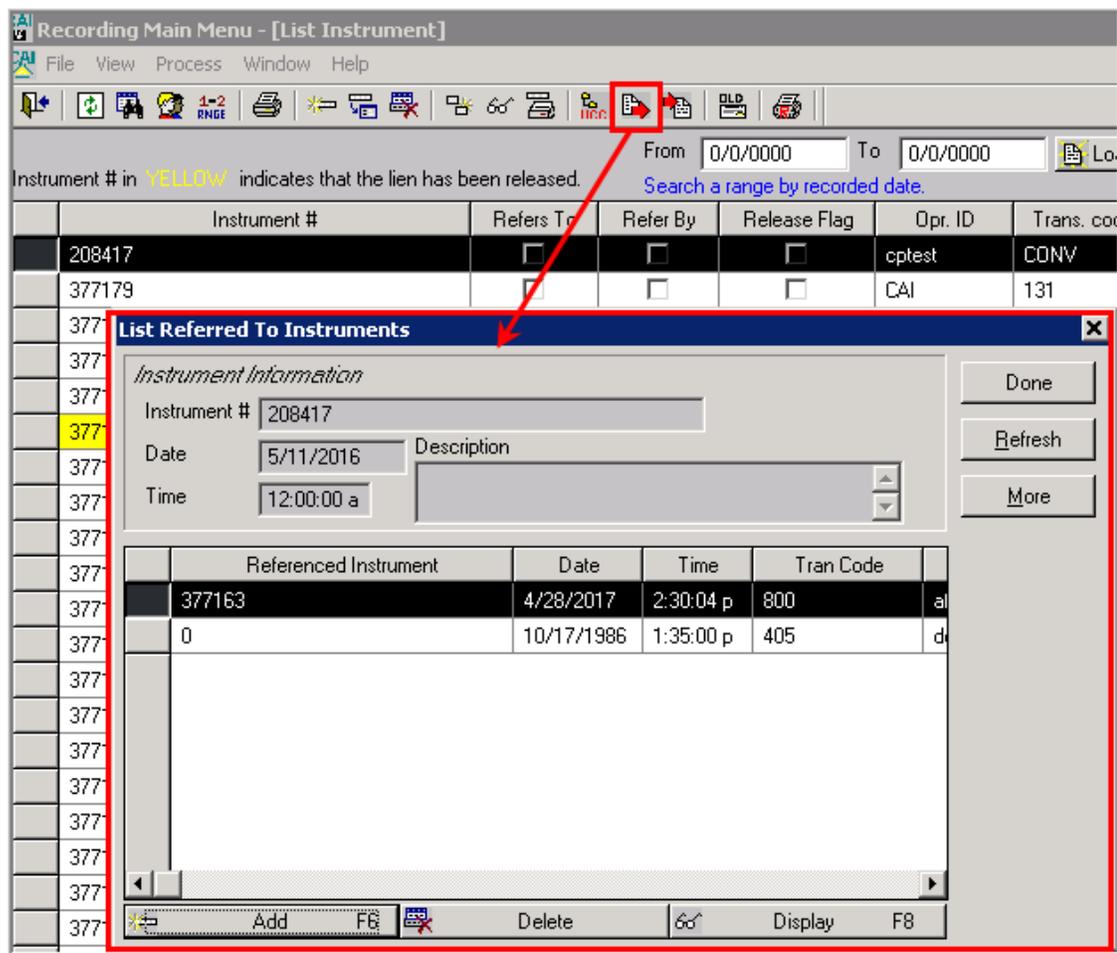


Click on the instrument for which you wnt to display or create references.

Click the Refers To Instrument toolbar button.  The List Referred To Instruments window will display.  You can also bring up this window by clicking the Ref button on the Display Instrument window.

To display one of the Refers To instruments, double click on the desired record or selct the record and click the Display button.  To delete a Refers To instrument, select the record and click the Delete button.  Note that a deletion here will only remove the reference between the two instruments, not the referenced instrument itself.

To add a new reference to antoher instrument,, click on the Add button.  The Add Reception Book Index window will display.  Enter the instrument numebr being referred to in the Reference Inst….field.  You can search for an insrument by double clicking on the field or by positionising your cursor on this field and pressing F4 function key.
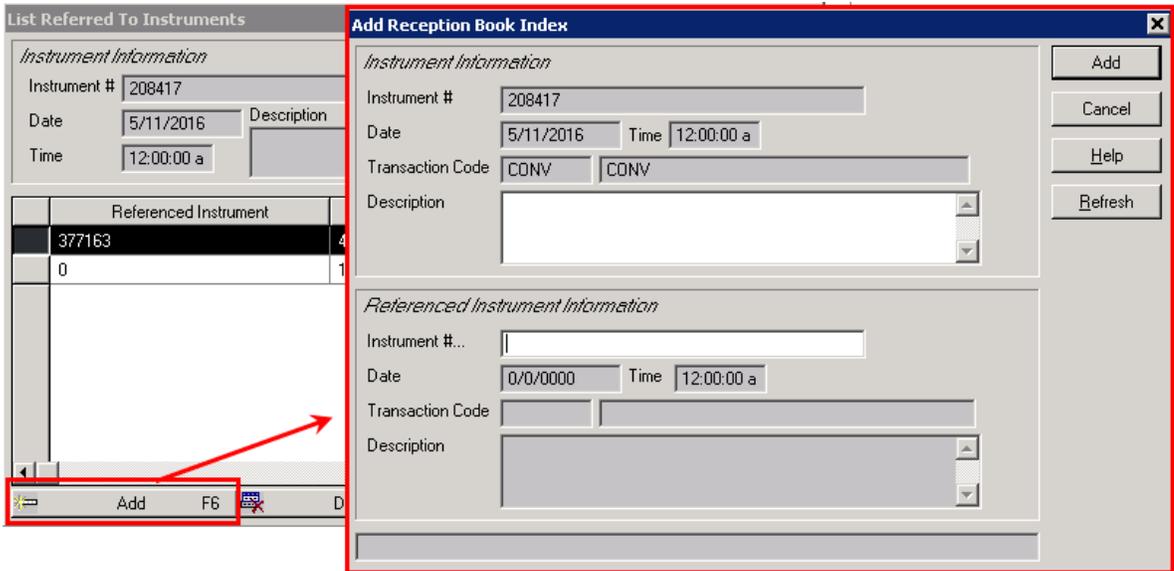
After adding a reference to an instrument, the Add Reception Book Index window will continue to be displayed to allow you to enter additional references. Click the Cancel button to close this window and return to the List Referred To Instruments window.

**Working with Referred-By Instruments**

Instruments that are referred to by a given instrument can be displayed using the Refers By function.

Click the Referenced By Instruments toolbar button. The List Referencing Instruments window will display. You can bring up this window by click the Ref By button on the Display Instrument window.

To display one of the referencing instruments, double click on the desired record or select the record and click the Display button.
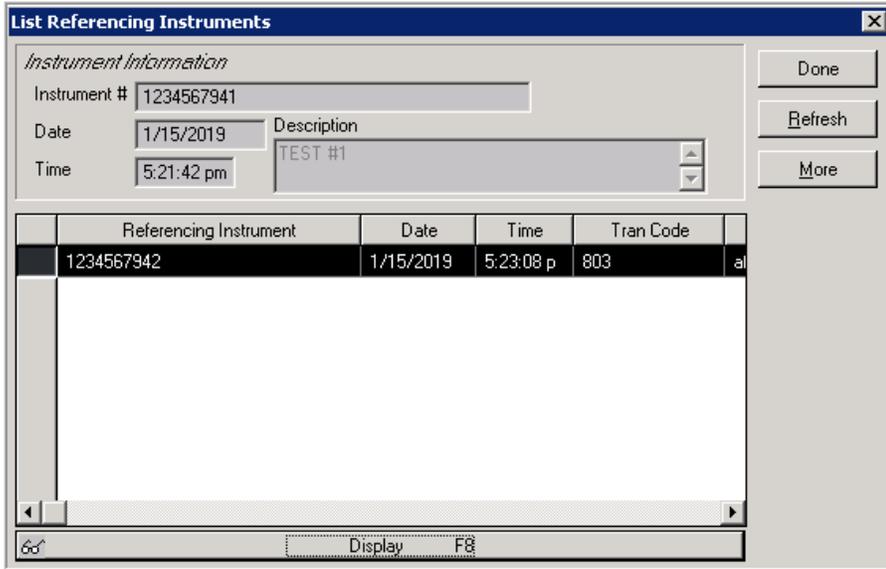
Click on the Done button to close this window.

**Adding UCC extension to an Instrument**

A UCC extension is an official record inficating that a lien exists against a property.  Some of the transaction codes are used in the recording of instrumnets require that a UCC extension be entered on the instrument.  When you add an instrument using on e of these transaction codes, the **Add UCC Extension** window will be displayed after you click on the Add key.

To add a USS extension, first enter the *UCC extension number.*  This number (required field) defaults to zero, but must be changed to a whole number value greater than zero before you can add the UCC extension to the instument.  You can use the instrument number if desired.
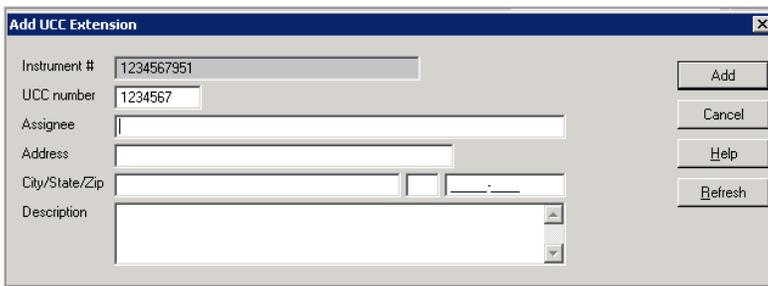


Enter the *name* aand  *address* of the UCC assignee and a *description* of the UCC extension, if any.  Complete the addition of the extension by clicking the Add key.  For more information on working with extension, see Chapter Four – Working with UCC's within this manual.

**Copying Similar Instruments**

To dave data entry time, you mau on occasion want to add instrument which are similar to instruments already entered in the system (same transaction type, desciption, or grantees and grantors, for example).  Instead of entering all of the identical information for each of the

instuments you can make a copy of the data from the previously entered instrument and modify the data.

1. Click the List Instruments toolbar button.

2. Click on the instrument to be copied.

3. Click the Copy toolbar button.  This will display the **Add Instrument** window which will already contain much of the information  from the copied instrument. You can also right click on the instrument and select Copy from the pop-up menu.

4. Make any necessary changes to the instrument data.  This includes adding, changing, and deleting grantee and grantor names.

5. Note that when using the Copy feature, the date field and the time field will show the current date and time that the instrument is being copied.  Use the Copy Last button on the Add Instrumnet screen jif you desire the date and time fields to copy from one instrument to another.

6. Click the Add button.

If you are entering a number of similar instrument one-after-another, you can also use the copy feature by clicking the Copy Last button on the Add Instrument window.  Information fron the instrument you just entered will automatically be displayed on the screen and allow you to make necessary changes.

**Changing Exiting Instruments**

1. Click the List Instruments toolbar button.

2. Click on the instrument to be chnaged.

3. Click the Change button to display the Change Instrument window.

4. Make changes as necessary and enter all applicable information for the instrument.  At a minimum, *operator ID, date, time, transaction code* and at least one *grantor*  must be entered.  See description for each field set forth under  *Adding New or Old Instruments* found earlier in this chapter.

5. Click the Change button.

**Using the Instrument Search**

The Instrument Search allows you to posistion the displayed list wit a certain instrument at the top or locate a particular instrument or group of instruments.

You can access the Instrument Search window by clicking the Search button or by pressing the F4 function key.

After completing any instrument search, you can use the Refresh button or press the F5 function key to return th elist to its previous state and position.
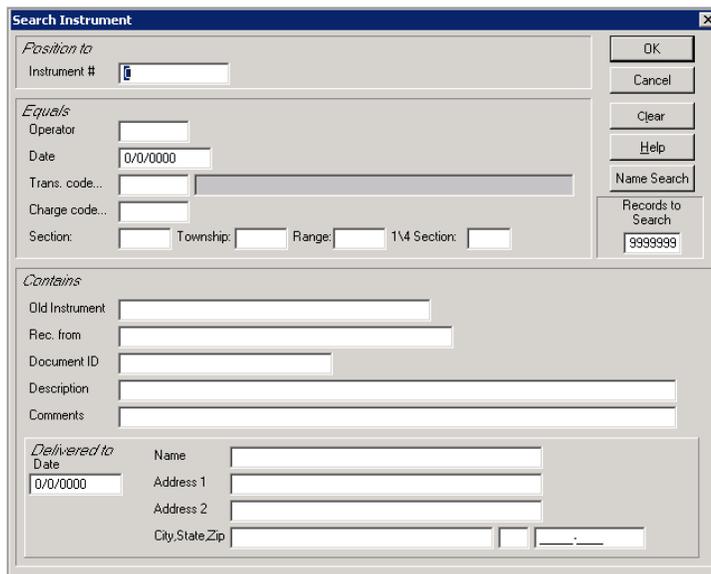
**Positioning the Instrument List**

With the instrument search, you can position the displayed list of instruments to a particular instrument number.  To position the list to a given number:

1.  From the List Instrument window, click the Search toolbar button or press the F4 function key.

2.  Enter the desired instrument number in the *Position to Instrument #* field.

3.  Click the OK button.

**Finding Instruments**

The instrument seach lets you locate an instrument or a group of instrument based on the information they contain.

1.  From the List Instrument window, click the Search toolbar button or press F4.

2.  Enter the information you want to search with as follows.  Search fields are defined as either "equals" or "contains" fields.  When you use an "equals" field, the search will only find instrument records with an exact mathc to the dat entered in the search field.  When you use a "contains" field, the search finds all records that contain your search data anywhenere in the field used.  For example, entering "john" in the *Delevered to Name* field will find the names "John Smith" and Sam Johnson".

3.  Click the OK button to execute the search.  The List Instrument window will now display showing only those records matching your seach data.

**Instrument Search Fields**

| | |
|---|---|
| *Operator* | The operator ID of the person who was logged on to the system when the instrument was recorded. |
| *Date* | The date that the instrument was recorded. |
| *Trans. Code…* | The transaction code, or instrument type, of the instrument.  To view and select from a list of instrument types, click this field and press the F4 key or double-click the field. |
| *Charge Code…* | The charge code identifying the company charged for recording the instrument.  To view and select from a list of charge codes, click this field and press the F4 key or double-click the field. |
| *Old Instrument* | Used when updating old records.  Enter the old instrument (up to 30 characters in length). |
| *Section* | The section associated with the instrument. |
| *Township* | The township associated with the instrument. |
| *Range* | The range associated with the instruments. |
| *¼ Section* | The quarter section associated with the instrument. |
| *Rec. From* | The received-from name on the instrument. |
| *Document ID* | The document ID entered on the instrument. |
| *Delivered To* | Delivered –to information for the instrument including name and address as well as the date of delivery. |
| *Undelivered* | Check this box to include only instruments which have not been delivered. |

### Refreshing the List

To reset the list of displayed instruments back to its original format, click the Refresh toolbar button or press the F5 function key.

If you have the Instrument Search window displayed and wish to return to the Instrument List without performing the search, click the Clear button and then click OK or press the ESC keu on your keyboard.

# CHAPTER THREE

## Using the Name Search

**Displaying the Name List**

The List Names window allows you to display a list of grantees and grantors that have been entered during the recording of instruments.  From the Name List, you can locate a particular instrument using a grantee's or grantor's name and then display, change, or print the instrument.

To display a list of names, click the Search Names toolbar button.  This will display an alphabetical list of grantees or grantors.

**Finding a Name**

1. Click the Search Names toolbar button to display an alphabetical list of grantees and grantors.
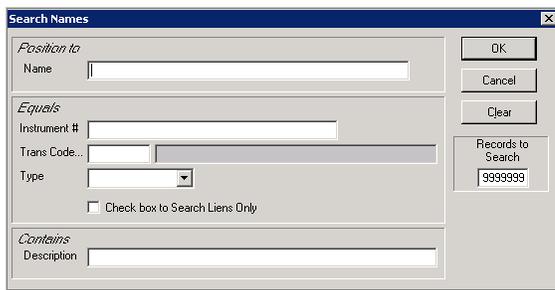


2. Click the Search toolbar button or press the F4 function key.

3. In the *Name* field, enter the first few letters o the last name of the person you are looking for.  If you want to search for liens only, click on the check box.  If you want to search bu instrument number, enter the instrument number or the first dew numbers of the instrument number and click the OK button.  The sustem will displa a listing of Instrument numbers contianing th enumber or number dequence in the Search Instrument Number field.  Highlight the desired instrument number and double-click on that line.  The Display Instrument screen will then display showind information relating to the highlighted instrument number in all completed fields.  You can also limit your search to listing only grantess or only grantors by selecting one of these in the *Type* field.  If you want the system to search through only a certain number of records, enter that number in the *Records to Search* field.  By default, the system will search through all instrument records (indicated by "9999999" in the field).

4. Click the OK button.  The list of names on the screen will be positioned at the first name matching what you entered on the search window.

**After You Find the Name**

After you locate the name of the desired person, ou can display, change, or print the attached instrument by highlighting it and selcting the appropiate option from the toolbar or menus.  More details on these processes can be found in Chapter 1 – Getting Started on this manual.

# CHAPTER FOUR

## Working with UCCs

### Listing, Displaying, and Updating UCC Extension

The List UCC Extensions window display all of the UCC's associated with instuments ecered int the system. From this window you can display and update existing UCC extensions as well as print UCC reports.

To display a list of UCC extensions, click the List UCC toold bar button. You can select and display an individual UCC records for update by clicking on the desired row and pressing F7 on your keyboard, selecting Change from the Process or right click menu, or just double-click on the record. Maje any necessary changes to the UCC extension records as follows.
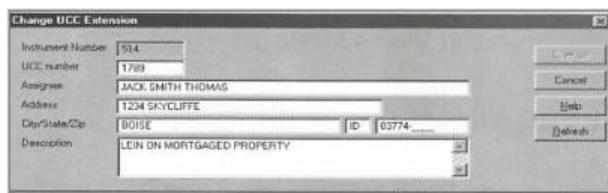


| | |
|---|---|
| *UCC Number* | A UCC extension is an official record that a lien exists against a property. The UCC extension number (required field) defaults to zero, but you must change this to a whole number value before you can add the UCC extension to the instrument. The instrument number can be used in this field. |
| *Assignee* | The name of the assignee for the UCC. Names should be entered consistently but can be entered in either first name/last name or last name/first name. |
| *Address* | The address of the UCC assignee. |
| *City/State/Zip* | The UCC extension assignee city, state, and zip code. The zip code can be enter as either five or nine digits. |
| *Description* | A description of the UCC extension up to 150 characters. |

### Displaying an Instrument Using a UCC Extension

From the List UCC window, you can display a recorded instrument attached to a UCC extension.

1. Click the List UCC's tollbar button to display the List UCC Extension window.

2. Click on the desired UCC extension and then click the Display Instrument button or press the F8 function key. You can also select Display Instrument from the Process or right click menu, or just double-click on the row.

3. The Display Instrument window for the instrument attached to this UCC extension will be displayed. For instructions on using this window, see Chapter 2 – Working with Instruments found in this manual.

4. Click the Done button to close the Display Instrument window.

**Searching UCC Extensions**

You can access the UCC search by clicking Search or by pressing the F4 function key.  The UCC Search allows you to locate a particular UCC extension or group in instruments.

Finding Instruments

The UCC Search lets you locate a UCC extension or a group based on the information they contain.

1.  Click the Search toolbar button or press the F4 function key.   The UCC Search window will be displayed.

2.  Enter the information you want to search for as follows.  Search fields are defined as either "equals" or "contains". When you use an "equals" field, the search will only find instrument records with an exact mathc to the dat entered in the search field.  When you use a "contains" field, the search finds all records that contain your search data anywhenere in the field used. For example, entering "john" in the *Delevered to Name* field will find the names "John Smith" and Sam Johnson".

3.  Click the OK button.

**UCC Extension Search Fields**

| | |
|---|---|
| *Instrument Number* | The instrument number associated with the UCC extension. |
| *UCC Number* | The UCC number entered when the UCC extension was added. |
| *Assignee* | The name of the assignee for this UCC extension. |
| *City/State/Zip* | The UCC extension assignee city, state, and zip code.  The zip code can be enter as either five or nine digits. |
| *Description* | A description of the UCC extension up to 150 characters. |

**Refreshing the List**

To reset the List UCC's window back to its original format, click the Refresh or press the F5 function key.

If you have the Search UCC window displayed and wish to return to the List UCC's window without performing the search, click the Clear button and then click OK or press the ESC key on your keyboard.

# CHAPTER FIVE

## Working with Cash

### Listing and Displaying Cash Transactions

The List Cash window displays all cash transactions that have been entered for the recording instrument and miscellaneous receipts.  The record selection option on this window allows you to display all cash records or only those entered manually.  From this window you can add new cash transactions, display and update existing cash records, and print cash reports and receipts.

To display a list of cash transactions, click the Cash toolbar button.  If you want to display only manual cash transactions, click on the Manual Records Only radio button below the toolbar; otherwise click the All Records radio button.  You can select and display an individual cash record by clicking on the desired row and pressing the F8 function key, selecting Display from the Process or right-click menu, or just double-click on the record.

### Adding New Cash Transaction

1.  Click the Cash toolbar button on the Main Menu.  The List Cash window will display.

2.  Click Add to add a new cash transaction.  The Add Cash window will now display.

3.  Enter all applicable information for the cash transaction as described below.

4.  Click the Add button to record the cash transaction and return to the List Cash window.
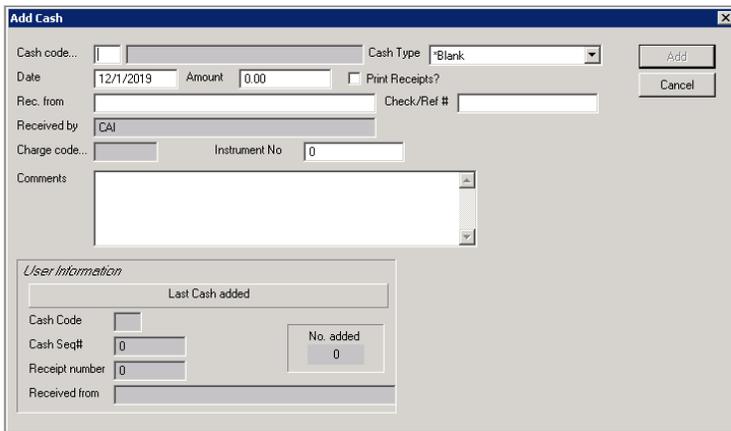


### Cash Transaction Fields

*Cash Code*   The cash code (required) indicating the type of transaction (copies, misc., etc.).  To view and select from a list of cash codes, double-click this field or press the F4 function key on your keyboard.

*Cash Type*   The type of payment made for this transaction (cash, check, etc.).  To view and select from a list of cash types, double-click this field or press the F4 function key on your keyboard.

*Date*   The date (required) of the cash transaction.  The system defaults to today's date, but you can manually change the date if needed.  A valid date must be entered.

*Amount*  The amount (required) of this transaction.  The amount defaults to the fee amount on the cash code but can manually be changed if needed.  The amount defaults to 0.00 until you enter a cash code with a default fee amount greater than zero or manually change the amount.  The amount cannot be left at zero.

*Print Receipts?*  Check this box if you want a receipt to print automatically upon adding the cash transaction.  Receipt printing defaults must be set up in the Control File of the Control Menu.

*Rec. From*  The name of the person or company cash was received from.

*Received By*  The user ID of the person receiving the cash.  This defaults to the user ID used to log into the system and cannot be changed.

*Check/Ref #*  This is used to enter a check number or other payment reference for the cash transaction.

*Instrument No.*  Use this field to enter the instrument number this cash transaction is referred to.

*Comments*  Add any necessary or desired comments to this field.


**Printing Cash Receipts**

A cash receipt will print automatically when you enter a cash transaction if the *Print Receipts?* Box is checked.  If you want to print a cash receipt for a transaction that has already been entered, do the following.

1.  Click the Cash toolbar button on the Main Menu.

2.  Highlight the cash transaction that you desire to print a receipt for and click the Display button or press F8 on your keyboard.  You can also double-click on the desired transaction to display the record.

3.  Click the Print Receipt button.  A window will display briefly telling you that a receipt is printing.

4.  Click the OK button to print the receipt and close the display window.

# CHAPTER SIX

## WORKING WITH MARRIAGE LICENSES

### Listing Marriage Licenses

The List Marriage Licenses window display all of the marriage licenses that have been entered into the system.  From this screen you can add new marriage licenses, locate, and display existing licenses, and print licenses and reports.

To display a list of existing licenses, click the Marriage Licenses button on the main menu.

### Adding New Marriage Licenses

1. Click the Marriage Licenses toolbar button on the main toolbar in the main menu.  This will bring up the List Marriage License widow.
2. Click the Add button to add a new marriage license.  This will bring up the Add Marriage License window.
3. Enter all applicable information for the marriage license.  Many fields on the marriage license form are required fields.  See description for each field below.
4. Click the Add button.  The Select Report window will appear allowing you to print a MARRIAGE LICENSE if desired.
5. If you wish to print a MARRIAGE LICENSE, select the appropriate options on the Select Reports window and click the Print button.  Make sure that the appropriate marriage license paper is loaded in your printer.  Click the Cancel button to close the window.

   Note:  MARRIAGE LICENSES must be printed on paper that meets standards specified by the Department of Vital Statistics.  Computer Arts, Inc. can order perforated paper for you that meets these standards.

### Marriage License Fields
Below are the descriptions of data fields you will need to fill in when entering a marriage license.  Many of these fields are required.

| | |
|---|---|
| *Inst # - Affidavit* | The marriage license affidavit instrument number. |
| *Inst # - License* | The marriage license instrument number.  This number may be the same as the affidavit number depending on the control file setting. |
| *Date* | The date of the marriage license (required), defaults to the current date but you can manually change if needed. |
| *Ceremony Date* | Date marriage ceremony will take place. |

Most of the field descriptions that follow are applicable to both the bride and groom.

| | |
|---|---|
| *Name (F/M/L)* | The name of the bride or groom in first/middle/last order.  A first and last name is required. |

| | |
|---|---|
| *Maiden* | The bride's maiden name.  Generally, you will want to enter only the last name. |
| *City* | The city corresponding to the individual's resident address. |
| *County* | County name corresponding to the individual's resident address (required). |
| *State* | The state corresponding to the individual's resident address (required).  You should use the complete state name rather than the postal abbreviation (i.e., "IDAHO" rather than "ID").  If the individual was born outside of the United States, it is not necessary to compete this field. |
| *Birth Date* | The individual's date of birth (required).  The date must be entered using a four-digit year (mm/dd/yyyy).  If this field appears with only two digit year, you should change your Regional Settings in Windows so it will appear a four-digit year.  This is especially important when entering birth dates from the 20th and 21st centuries. |
| *Age* | The system automatically calculates the person's age (required field) based on the current date and the birth date entered. |
| *Race* | The individual's race.  Click the down arrow to the right of this field to view and select from a list of races.  You can set a default race in the Control Menu so this field will automatically default to the most prevalent race in your county. |
| *Other* | If you select OTHER in the Race filed, you must type in the race description in this field.  You can use this feature if someone specifies a race not included in the list of options, or specifies a different name for a race. |
| *Birth City* | The name of the city in which the person was born (required). |
| *Birth State* | The state in which the person was born. You should spell out the complete name of the state instead of using a postal or other abbreviation.  Note – This field should be left blank if birth country is other than the United States. |
| *Birth Country* | The country in which the person was born.  This defaults to "USA" when the state field (above) is competed. |
| *Soc Sec #* | The person's social security number.  Dashes are not required when entering the social security number but can be added for improved readability (i.e. "123-45-6789"). |
| *Marital Status* | The current marital status of the person (required).  To view and select from a list of values, click the down arrow to the right of this field.  Valid entries are *Divorced, Single*, or *Widowed*. |
| *Parent Name* | The name of person's parent if he or she is under 18 years of age.  This information in needed for the affidavit.  All information regarding a person's parent or guardian is required if the birth date entered indicate that they are under 18 years of age. |
| *Sex* | The sex of person's parent if the person is under 18 years of age.  This information is needed for the affidavit. |
| *Relationship* | The relationship of person' parent if under 18 years of age.  To view and select from a list of values, click the down arrow to the right of this field.  Values include *Mother, Father*, or *Guardian*.  This information is needed for the affidavit. |

**Changing a Marriage License**

The Recording System allows you to change information on marriage licenses if necessary.  Any changes should be made with caution and only when they are absolutely necessary, especially if the marriage license has already been printed and delivered to the bride and groom.

1.  Click the Marriage Licenses toolbar on the main menu.
2.  Click on the marriage license record to be changed.
3.  Click the Change Selected Marriage License to display the Change Marriage License window or press F7 on your keyboard.  You can also select the Change option from the Process or right click menu.
4.  Change any necessary information for the marriage license.  See descriptions for each field above.
5.  Click the Change button to save the modifications and return to the List Marriage License window.

**Printing a Marriage License**

MARRIAGE LICENSES can be printed when adding a new license as described above.  They can also be added by dong the following:

1.  Click the List Marriage Licenses toolbar button on the main menu.  The List Marriage License window will display.
2.  Click on the marriage license record to be printed.  Select the Print option from the Process menu or right click on the record and select Print.  The Select Reports window will display. This can also be done by clicking on the Print button located on the Display Marriage License window.
3.  Click on the report titled MARRIAGE LICENSE to print.
4.  Select the report destination option and select the desired printer by clicking the Setup button if desired.
5.  Click the Ok button to print MARRIAGE LICENSE.

# CHAPTER SEVEN

## Working with Liquor Licenses

**Listing Liquor-Beer Licenses**

The List Liquor-Beer License window displays all of the liquor-beet licenses that have been entered into the system.  From this screen you can add new liquor-beer licenses, locate and display existing licenses, transfer licenses, and print licenses and reports.

To display a list of existing licenses, click the Alcoholic Beverage License Application toolbar button located in the Main Menu.

**Adding an Alcoholic Beverage License Application**

1.  Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License window will display.
2.  Click the Add button to add a new application.  The Add Liquor-Beer License window will display.
3.  Enter all applicable information for the liquor-beer license.  Many fields on the liquor-beer license screen are required fields.  See descriptions for each field in the next section.
4.  When finished with Page 1 of the application, click the Next Page button.  When all information has been entered, click the Add button.
5.  A window will now display, asking if you desire to record payment for the application.  Click Yes to continue (whether you are adding a payment or not) or No to abort the application and return to the List Liquor-Beer License window.
6.  Upon clicking Yes, the Add License Payment Receipt File window will display.  Since the application has not yet been approved, payment of fees is optional.  If applicant desires to make payment, record it on this screen.
7.  If applicant does not desire to pay fees until the license is approved, click the Cancel button to add the license to the system and return to the List Liquor-Beer License window.

**Liquor-Beer License Fields**

Below are descriptions of data fields you will need to fill in when entering a liquor-beet license application. Many of these fields are required.

| | |
|---|---|
| *Application Date* | (required field) Date application is being made for a liquor-beer license. |
| *Liquor License Type* | (required field) Choose Corporation, Individual, Partnership, or LLC from the drop-down menu. |
| *Sell From Date* | (required field) Date applicant desire to begin sales. Note: license is valid for one year and must be reapplied for annually. |
| *Sell To Date* | (required field) Enter date that applicant desires to cease liquor sales. Note that the license is valid for only one year and must be reapplied annually. If applicant is an ongoing business, enter the same month and date on the "Sell From Date" field and add one year to this field. |
| *Number* | If applicant holds an Idaho Retail Alcoholic Beverage License, insert the license number here. |
| *Issued Date* | (if applicable) Enter the issued date of the Idaho Retail Alcoholic Beverage License here. |
| *Beer License Fees* | Fee set by agency to charge applicant for a license to sell: Draft Beer (includes bottled, canned, or retail). Bottled or Canned Beer, to be consumed on the premises of the applicant. Bottled or Canned Beer, NOT to be consumed on the premises of the applicant. |
| *Liquor License* | City use Permit Liquor License Fee set by agency. Insert the city within the appropriate field. |
| *Wine License Fees* | Fees set by agency to charge applicant for a license to sell: Retail Wine Wine by the Drink Special Wine (Sunday) |
| *Total Fees* | Total fees due to agency by applicant for one year liquor-beer license. |
| *License Fees Paid* | This box will be checked once license fees have been paid in full. |
| *Business Name* | Applicant's business name or name of individual. |
| *Physical Address* | Physical street address, city, state, and zip code where applicant intends liquor sale to take place. |
| *Mailing Address* | Mailing address, city, state, and zip code where documentation pertaining to liquor licenses can be sent. The Copy button can be used if the physical address and the mailing address are the same. |
| *Print Label* | Check this box if you desire to print a mailing label for use in sending printed application to the applicant for signature. |
| *Applicant* | Insert officers & Governing Board if a corporation, partners if a partnership; or individual applicant name. |
| *General Nature of Business* | State the general nature of the business. |
| *Active Manager Name* | Name of applicant's active manager. |
| *Active Manager Address* | Street address of the applicant's active manger. |
| *Active Manager City* | City in which applicant's active manager resides. |

| *Active Manager State* | State (two letter abbreviation) in which applicant's active manger resides. |
| *Active Manager Zip Code* | Zip code (6 or 9 digit) that coincides with active manager's address. |
| *Approved Date* | Date application was approved by agency. |

If the box in the Control Menu has been checked, questions will be printed on the application pertaining to the applicant (and/or his Associates) pertaining to citizenship, age, and felony convictions.  Applicant can respond by clicking the Yes or No, or No Response radio buttons.  Note that all questions default to No Response.

**Changing an Alcoholic Beverage License Application**
1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the license application that you desire to change and click the Change button.  The Change Liquor-Beer License window will display with the highlighted application information showing in all completed fields.  Changes can be made to any and/or all fields showing a white background.  Change any field(s) showing a white background as desired and click the Change button.  Note that the Change button will appear grayed out until you change one of the fields.
3. If the application has been approved, click the Get Next License # button.  The License No. field to the left of this button will now display the license number assigned to the application.  If payment for fees associated with the license have already been paid, the license can now be printed and mailed to the applicant.
4. If payment has not been paid, click the Payment button to record payment.  Once the license has been approved, a license number has been assigned and payment of fees has been recorded, highlight the application on the List Liquor-Beer License window and click the Print Liquor License button to print the license and return to the Liquor-Beer License window.

**Deleting an Alcoholic Beverage License Application**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the license application that you desire to delete and click the Delete button.  The Delete Liquor-Beer License window will display with the highlighted application information showing in all completed fields with a red background.
3. Click the Delete button to confirm the deletion and return to the List Liquor-Beer license screen.

**Searching For an Alcoholic Beverage License Application**

1. Click the Alcoholic Beverage License Application toolbar on the Main Menu.  The List Liquor-Beer License will display.
2. If you do not see the application that you're looking for within the grid, click the Search button or press F4 on your keyboard.  Now complete fields within the filter screen containing values from the application that you're looking for.  Search fields are defined as wither "equals" or

"contains" fields.  When you use an "equals" field, the search will only find applications with an exact match to the data entered in the search field.  When you use a "contains" field, the search finds all records that contain your search data anywhere in the field used.  For example, entering "John" in the *Business Name* field will find the names "John's Lounge" and "Johnson's Lounge".

3. Click the OK button to begin the search.

**Displaying an Alcoholic Beverage License Application**

1. Click the Alcoholic Beverage License Application toolbar on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the application within the field that you desire to display and click the Display button.  The Display Liquor-Beer License screen will show the application information in all completed fields.
3. When finished, click the OK button to return to the List Liquor-Beer License screen.

**Transferring an Alcoholic Beverage License**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the license application that you desire to transfer and click the Transfer Information button.  The List Liquor-Beer Transfer License window will display.
3. Now click the License Transfer button. The Add Liquor-Beer Transfer License screen will display.  Enter the values in all fields on this screen as they are all required fields.
4. Now click Add to add the transfer.  At this point, a screen will display asking if you desire to record payment for the application.  Click "Yes" to continue (whether you are adding a payment or not) or "No" to abort the transfer.
5. Upon clicking "Yes", the Add License Payment Receipt File window will display.  Since the transfer has not yet been approved, payment of fees is optional.  If applicant desires to make payment, record it on the screen.
6. If applicant does not desire to pay fees until the license is approved, click the Cancel button to record the transfer and return to the List Liquor-Beer Transfer License window.

**Changing an Alcoholic Beverage License Transfer Application**

1. Click the Alcoholic Beverage License Application toolbar on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the license application that you desire to make a transfer change to and click the Transfer Information button.  The List Liquor-Beer License will display.
3. Now click the Change Transfer button.  The Change Liquor-Beer Transfer License screen will display.  The fields that you can change will have a white background. Fields that you cannot change will have a gray background.  Make changes to any field(s) showing a white background and click the Change button to effect the change and return to the List Liquor-Beer Transfer License window.
4. If transfer fees have not been paid, click the Payment button on the Change Liquor-Beer Transfer License window to record payment.  Once the license has been approved, and payment

and fees have been recorded, click the Print Liquor License button on the Main Menu to print the new transferred and return to the List Liquor-Beer License window.

**Displaying an Alcoholic Beverage License Application Transfer**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the license application that you desire to display a transfer for and click the Transfer Information button.  The List Liquor-Beer Transfer License will display.
3. Now click the Display Transfer button on the lower toolbar.  The Display Liquor-Beer Transfer License window will now show all information relating to the highlighted application transfer.
4. When finished, click the OK button to return to the List Liquor-Beer Transfer License window.

**Purging Alcoholic Beverage License Applications from Previous Year**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Now click the Remove Applications for Year button.  The Process Liquor-Beer License screen will display.  Enter the year you desire to remove application for and click Process.  A warning screen will display asking you to confirm the deletion.  Click "Yes" to remove records for he inserted year or "No" to abort the deletion and return to the List Liquor-Beer License window.

**Displaying an Alcoholic Beverage License Application Payment**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the application within the grid that you desire to display a payment for and click the Display Payments button.  The List License Payment Receipt File screen will display showing the receipt date and number.  For more detailed information, click the Display Payment button located on the lower toolbar or press F8 on your keyboard.  The Display License Payment Receipt File screen will show payment details.

**Printing a Liquor License**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the application within the grid that you desire to print a license for.  Click the Print Liquor-Beer License button to print the license and return to the List Liquor-Beer License window.

   NOTE: If the applicant fees have not been paid or the application has not been issued a license number, the license will not print.

**Printing a Completed Beverage License Application**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the application within the grid that you desire to print an application for and click the Liquor License Application with Information button to print the completed application and return to the List Liquor-Beer License window.  This will print a completed liquor license application that will require the applicant's signature before further processing.

**Printing a Receipt for an Alcoholic Beverage License**

1. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License will display.
2. Highlight the license application within the gird that you desire to print a receipt for and click the Change button.  The Change Liquor-Beer License screen will display.  Click the Payment button.  Record the payment and check the Print Receipt box located in the lower right hand corner of the Add License Payment Receipt File screen to record the payment and print receipt for said payment.
3. If payment has already been recorded, from the List Liquor-Beer License screen, highlight the application you desire to print a receipt for and click the Display Payments button.  The List License Payment Receipt File will display.  Highlight the transaction within the grid that you desire to print a receipt for and click the Receipt button.

**Printing a Mailing Label for he "Delivered To" on an Alcoholic Beverage License Application**

1. If your county uses a label printer to produce labels and the label printer filed is flagged on the Recording Control File, a mailing label can be printed for the "Delivered To" on an alcoholic beverage license application.
2. Click the Alcoholic Beverage License Application toolbar button on the Main Menu.  The List Liquor-Beer License window will display.
3. Highlight the license application within the grid that you desire to print a mailing label for and click the Change button.  The Change Liquor-Beer License screen will display.  Click the Print Label button to print a mailing label for the "delivered to" on the highlighted alcoholic beverage license application and return to the List Liquor-Beer License window.

## CATERING PERMITS

**Adding a Liquor Catering Permit**

1. Click the Liquor Catering Permit toolbar button on the Main Menu.
2. The List Liquor Catering Permit window will display. Click the Add to add a new catering permit
3. The Add Liquor Catering Permit window will display. Enter the values for all applicable fields and change the default values if necessary. Note that numerous fields on this screen are required fields (see explanation of fields in the next section).
4. Now click the Add button again to add the new catering permit. At this point a screen will display asking if you desire to record payment for the permit. Click "Yes" to continue or "No" to abort the application and return to the List Liquor Catering Permit screen.
5. Upon clicking "Yes", the Add License Payment Receipt File screen will display. Since the permit has not yet been approved, payment of fees is optional. If applicant desires to make payment, record same on this screen.
6. If applicant does not desire to pay fees until the permit is approved, click the Cancel button to add the license and return to the List Liquor Catering Permit screen. Note that the just recently added permit will show within the grid on this screen.

**Liquor Catering Permit Fields**

Below are descriptions of data fields you will need to fill in when entering a liquor catering permit application. Many of these fields are required.

*Licensee's Name*  (required field) Name of corporation, partnership, or individual listed on the state license.

*Fee*  (required field) Fee set by agency to charge applicant for a catering permit.

*Address*  (required field) Address of applicant shown above.

*City*  (required field) City in which applicant resides.

*County*  (required field)  County in which applicant resides.

*Liquor License*  (required field) State of Idaho Liquor License By The Drink License Number and Year in which license was issued.

*Date*  (required field) Date applicant desires to begin using permit.

*Hours From*  The hour applicant desire to begin using permit.

*Hours To*  The hour applicant desire to end using permit.

*At*  (required field) Physical address or city landmark where applicant intends catering to take place.

*Catering For*  Organization(s), Group(s), or Person(s) that applicant desire to provide catering service for (use designated fields).

*Number of Days*  (required field) Insert the number of days over which catering for specific organization(s), group(s), or person(s) will take place.

*Approval*              Turn on the appropriate radio button once catering permit has been approved or disapproved.

*Approval Disapproval*  Insert the date that catering permit was approved or disapproved.
*Date*

### Changing a Liquor Catering Permit

1. Click the Liquor Catering Permit toolbar button on the Main Menu.  The List Liquor Catering Permit window will display.
2. Highlight the permit that you desire to change and click the Change button.  The Change Liquor Catering Permit window will display with the highlighted permit information showing in all completed fields.
3. The fields that you can change will show a white background.  Fields that you cannot change will show a gray background.  Make changes as necessary to any field(s) showing a white background.  When finished, click the Change button to effect the change(s) and return to the List Liquor Catering Permit window.

### Deleting a Liquor Catering Permit

1. Click the Liquor Catering Permit toolbar button on the Main Menu.  The List Liquor Catering Permit window will display.
2. Highlight the permit that you desire to delete and click the Delete button.  The Delete Liquor Catering Permit window will display with the highlighted permit information showing in all completed fields with a red background.
3. Click the Delete button to confirm the deletion and return to the List Liquor Catering Permit window.  Notice that the just recently deleted permit will no longer show in the grid on this screen.

### Copying a Liquor Catering Permit

1. Click the Liquor Catering Permit toolbar button on the Main Menu.  The List Liquor Catering Permit window will display.
2. Highlight the permit within the grid that you desire to copy and click the Copy button.  The Add Liquor Catering Permit window will display with the previously highlighted permit information showing in all completed fields.  Make desired changes.
3. When finished, click the Add button to add the new catering permit.  At this point, a screen will display asking if you desire to record payment for the permit.  Click "Yes" to continue or "No" to abort the application and return to the List Liquor Catering Permit window.
4. Upon clicking "Yes", the Add License Payment Receipt File screen will display.  Since the newly created permit has not yet been approved, payment of fees is optional.  If applicant desires to make payment, record same on this screen.

5.  If applicant does not desire to pay fees until the permit is approved, click the Cancel button to add the permit and return to the List Liquor Catering Permit window.  Note that both the recently created permit and the permit that was copied are displayed within the grid on this screen.

**Searching for a Liquor Catering Permit**

1.  Click the Liquor Catering Permit toolbar button on the Main Menu.  The List Liquor Catering Permit window will display.
2.  If you don't see the permit you are looking for within the grid, click the Search button or simply press F4 on your keyboard.  Now complete fields within the filter screen containing values from the permit that you are looking for.  Search fields are defined as either "equals" or "contains" fields.  When you use an "equals" field, the search will only find application with an exact match to the data entered in the search field.  When you use a "contains" field, the search finds all records that contain your search data anywhere in the field used.  For example, entering "John" in the *Licensee's Name* field will find the names "John's Lounge" and "Johnson's Lounge".
3.  Click the OK button to begin the search.

**Displaying a Liquor Catering Permit Payment**

1.  Click the Liquor Catering Permit toolbar button on the Main Menu.  The List Liquor Catering Permit window will display.
2.  Highlight the permit within the grid that you desire to display a payment for and click the Display Payments button  The List License Payment Receipt File window will display showing the receipt date and number.

**Print a Liquor Catering Permit**

1.  Click the Liquor Catering Permit toolbar button on the Main Menu.  The List Liquor Catering Permit window will display.
2.  Highlight the permit within the grid that you desire to print.  Click the Print Catering Permits button to print the permit and return to the List Liquor Catering Permit window.

    NOTE:   If a permit has not been paid or has not been issued a permit number, the permit will not print.

**Printing a Receipt for a Liquor Catering Permit**

1.  Click the Liquor Catering Permit toolbar button on the Main Menu.  The List Liquor Catering Permit window will display.
2.  Highlight the permit within the grid that you desire to print a receipt for.
3.  Click the Display Payments button. The List License Payment Receipt File screen will display. Highlight the permit within the grid that you desire to print a receipt for and click the receipt button to print the receipt and return to the List Liquor Catering Permit window.

# CHAPTER EIGHT

## Printing Receipts

A number of printed reports can be produced from the Recording System.  You can print different reports from nearly all the main menus and list windows in the system.  The reports available will differ depending on the menu or window you are on, but the process of selecting and printing is nearly identical regardless of which report you want.

**Types of Reports**

There are two primary types of reports in the Recording System.  The first type is the **single-instance** report.  Single-instance reports provide details of an individual record, also referred to as a "row" on list windows.  These reports are usually printed directly from a display window such as the Display Instrument window, or displayed lists such as the List Instruments window.

The second and most commonly type used is referred to as a multiple record or list report.  This type of report is typically a list or summary of many records.  Examples of this type of report include "INSTRUMENTS – BY NUMBER", "INDEX-DIRECT", and "REVENUE SUMMARY".  This type of report is printed using the Select Reports button from the toolbar.

Other types of printed reports include cash receipts and other items that print automatically when you perform certain functions.  Some counties use label printers when an instrument is recorded.  These labels contain information about when and how the document was recorded and are affixed to the instrument.

**Printing Single-Instance Reports**

**Selecting Record to Print**

To print single-instance reports directly from a list window, you must first select one of more records to print.  To select a single record, click on the desired row in the list window.

You can also print details for several records at the same time.  To select a range of contiguous records, click on the first record, press and hold down the Shift key, and click on the last records you want to select.

To select multiple records that are not displayed next to each other on a list screen, click on the first record, press and hold down the Ctrl key, and click on each additional record you wish to print.  You can use the scroll bars to move up and down through the list to select more records.

## Printing Selected Records

Once you have selected one or more records to be printed, you can print the details by choosing the Print Selected Row option from the Process menu or by right-clicking on one of the selected records and selecting Print Selected Row from the pop-up menu.
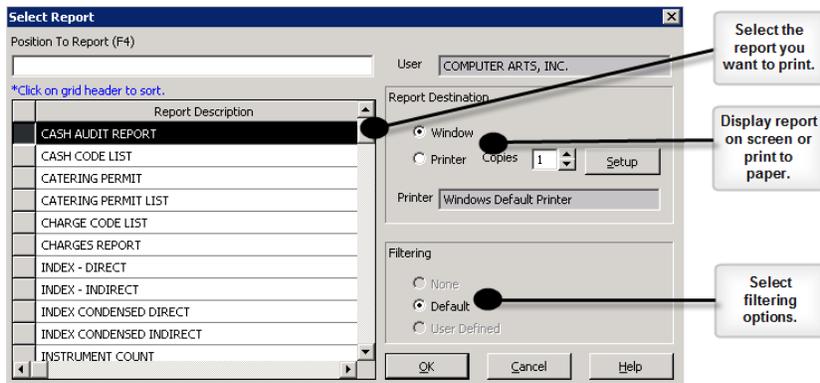
## Selecting Reports to Print

List-type reports are printed using the Select Reports button on the toolbar. This button is available from the toolbars on all of the main list windows.

## Locating Reports to Print

The first step in printing a report is locating the one you want to print. Generally, the reports available using the Select Reports button will be closely related to the list window displayed. For example, if you are on the List Instrument window, the reports displayed in the report selection will be instrument reports (i.e. INSTRUMENT COUNT REPORT, INSTRUMENTS – BY TYPE, etc.).

## Using the Report Selection Window

To select a report from the Report Selection window, just click on the name of the report you wish to print. If you don't see the report you want, enter the first few letters of the report name in the *Position To* field, move to that report.

After selecting the reports you want to print, you need to select the destination and filtering options. Under *Report Destination*, you can select to send the report to the printer or display your screen. Select the number of copies you want to print if printing on paper. You can also display and change your Windows printer setting using the Setup button, if necessary.
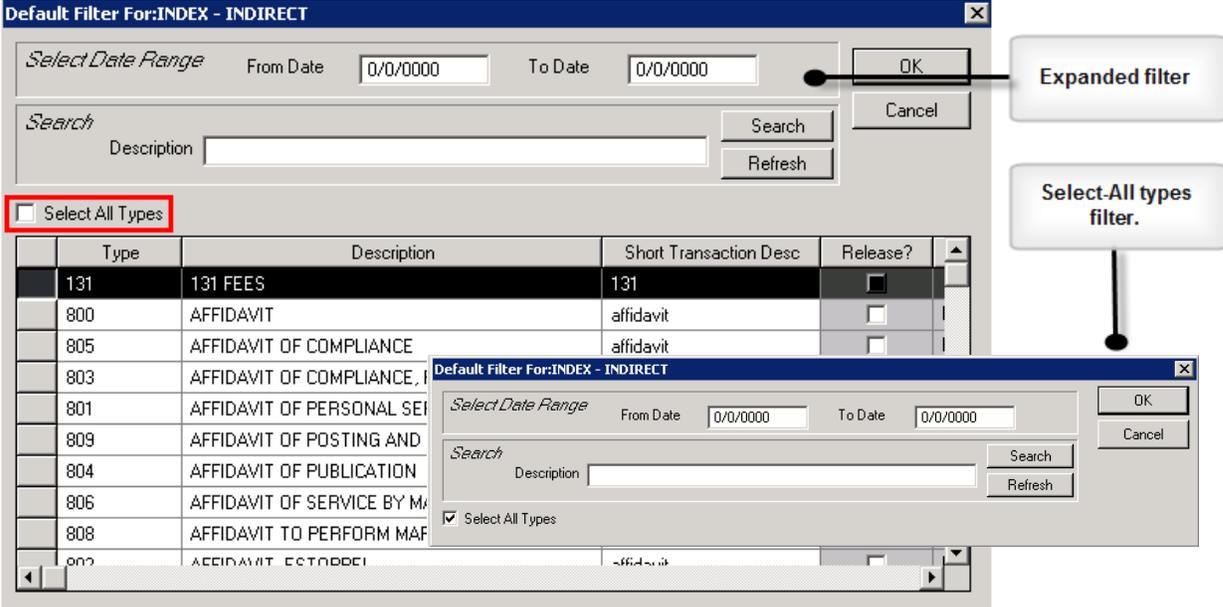
For many reports, you can use the *Filtering* options to decide whether to use a filter to select only certain records for the report or to include all records. Instructions on display and filtering reports are in the following section.

**Using Report Filters**

Many of the reports in the Recording System use filters that allow you to select what types of records will be included on a report. The filters differ depending on which report you are printing. The four main filters are described next.

**Filters for Instrument Reports**

The Instrument Reports filter allows you to limit an instrument report to include only instrument of a given type and filed within a specific date range. To limit the report to a particular date range, enter a "from "and "to" date.

When the filter is displayed, it is expanded (as shown above) to provide a list of instrument types that you can select for the report. To include all types of instruments on the report, click the check box labeled *elect All Types.* When this box is checked, the list of instrument types is hidden. If the instrument type you want is not shown, you can use the scroll bar to page down or enter the first few letters of the type description and click the Search button.

To select one instrument type for the report, click on the desired type. You can select multiple instrument types by pressing holding the Ctrl key and clicking on each of the types you want to include. Click the OK button to continue with report printing.

**Filter for Cash Reports**

The Cash Reports filter is used to limit reports to include only revenue records of a given type of date range. To limit the report to financial transactions occurring within a particular date range, enter a "from" and a "to "date.

To select a single revenue type, enter the cash code for that type in the field provided. You can display a list of valid cash codes to select form by double-clicking the field or clicking on the field and pressing the F4 key. Leave this field blank to include all types of revenue on the report.

You can also limit the records included on the report to those of a particular cash type (check, cash, etc.) using the Cash Type field.  Click on the arrow to the right of the field to display a list of valid cash types. You should be aware that if the Cash Type is not used consistently by your county when entering financial transactions, some cash records may be omitted by selecting one specific type in this field. Leave the entry in this field *Blank* to include all cash types on the report.

In the Report Type field, indicate whether you would like to print a detail or summary report.  To select one of the options, click on the arrow to the right of the field.  Click the OK button to continue printing.

**Filter for Charges Reports**

The Charges Reports filter is used to limit reports to include only charges by a certain agency and within a specific date range.  To limit the report to a particular date range, enter a "from" and a "to "date.

When you display this filter, it is expanded (as shown above) to provide a list of all agencies that you can select for the report.  To include charges by all agencies on the report, click the check box labeled *Select All Types.*  When this box is checked, the list of agencies is hidden.

To select one agency for the report, just click on that row in the list.  You can also select multiple agencies by pressing and holding the Ctrl key and clicking on each of the rows you want to include.

In the *Report Type* field, indicate whether you would like to print a detail or summary report. To select one of these options, click on the down arrow to the right of the field. Click the OK button to continue with report printing.

**Filter for Instrument Type List**

The filter for the **Instrument Type List** allows you to select the sort order for the report. You can choose to have the list sorted by either the *type code* or the *type description* by clicking on the arrow to the right of the *Sort Selection* field. And selecting the desired option.

**Displaying Report on the Screen**

When selecting a report, you have the option of printing a report to a printer or to your screen under the *Report Destination* options. If you select the Window option, your report will "print" (display) to the screen and appear just as it would on paper. You can click the Close button at any time to exit the Report Display window and return to the report selection.

Once the report is display on the report display window, you can page through the report, increase or decrease the magnification (zoom), and print the report to paper or export it to another application.
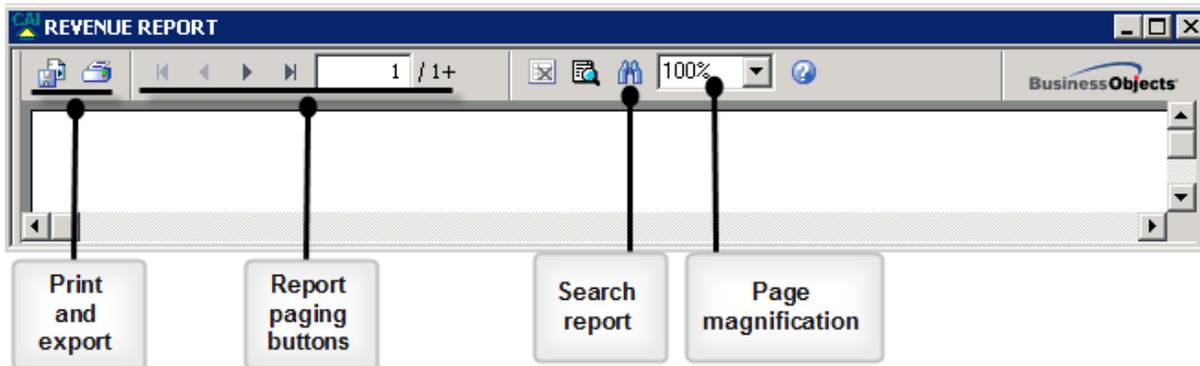


**Paging through a Displayed Report**

To page through a report that you have displayed on the screen, you can use your keyboard page up and page down keys, scroll bars on the screen, and the paging toolbar icons listed.

Go to first page of report.

Go to previous page of report.

| ▶ | Go to next page of report. |

| ▶| | Go to last page of report. |

## Changing the Display Magnification

You can change the magnification of a displayed report, or "zoom" in or out, to make the report easier to read and review. To increase or decrease the magnification, click on the arrow to the right of the report magnification field and select the desired value. You can select a value from 25% to 400% or enter a specific magnification in the field and press the TAB key on your keyboard.

## Printing a Displayed Report

To print a report after displaying it on the screen, click the Print button at the top of the Report Display window. This will display the Print widow and allow you to select the pages you wish to print as well as the number of copies. Click the OK button on this window to print the report.

## Exporting Report Files

After displaying a report on the screen, you can export the report to a file for use in a spreadsheet, word processing, or other software. To export a report:

1. Select and print a report to the screen as describes in previous section.
2. Click the Export button on the top of the Report Display window.
3. Select the desired format for the exported file. The most commonly used formats are EXCEL, Word, and PDF. In the Destination field, select Disk file.
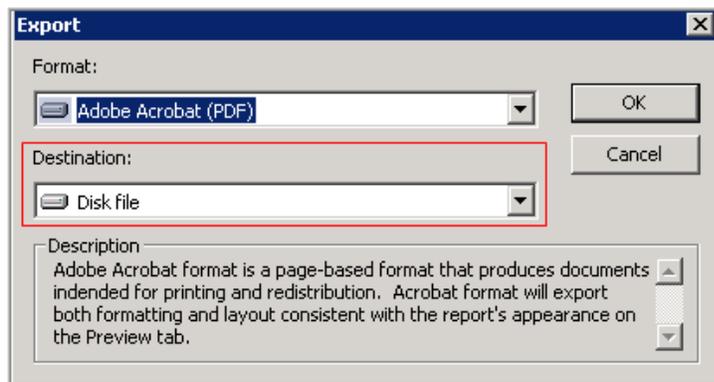


4. Click the OK button. If you selected EXCEL format, an additional Format Option window will be displayed. The settings on this window are generally sufficient, but you may wish to include column headings. Click OK to continue. The Choose Export File window will be displayed.
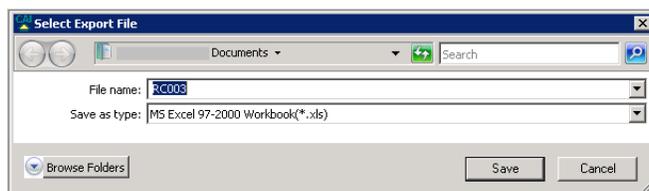
5. On the Choose Export File window, select the drive and folder where you want to save the exported file.
6. Enter the name of the exported file to be saved in the File name field.  You can leave the name of the report as displayed, but you may wish to enter a more descriptive name.  The Save As Type field will contain the type of file you selected in the earlier Export window.  Do not change this field.
7. Click the Save button to export the report and save it to the selected drive.

**Printing a List of Available Reports**

You can find out what reports are available in the Recording System by printing a list of all reports.

1. Click the Select Reports button in the main toolbar.
2. Click the report titled REPORTS LIST and select your report destination options.
3. Click the Print button to print the report.

## Report Troubleshooting

You may occasionally run across trouble when printing reports.  Printing problems can be caused by a wide variety of factors.  This section covers a number of the most common problems and their solutions.

If the suggestions outlined in this section don't solve your problem or answer your question, contact the Computer Arts, Inc. help desk at 800-365-9335.

**I can't find the report I need.**

Sometimes it might be difficult to figure out where to go in the system to print the specific report you want.  Here are some things you can do when you run into this problem:

➢ **Go to the window most closely related to the desired report.**  Consider major report topics such as instruments, cash, liquor licenses, catering permits, and marriage licenses.  After displaying the window most closely related to the desired report, click the Print button on the window, if available, or click the Print icon on the toolbar.  This will display a list of report that can be run from this section in the system.
➢ **Consider whether you want a report for one record or for a list of records**.  For example, if you want to print information for a single instrument, display the desired instrument and click the Print button on the display window.  You can also right click on a particular record from a list window and select the Print Selected Row option from the menu.  Reports involving multiple records are printed by clicking on the Select Reports icon on the toolbar.
➢ **Click on the Select Reports icon on the Recording Main Menu toolbar.**  From the Main Menu, click the Select Reports icon to list all reports available from this location of the system, including these that are not specifically related to a particular list or display window.
➢ This section shows the toolbar icons you can select from the Main Menu toolbar to print many of the reports in the system.

**When I launch a report, I get an error message.**

Computer Arts, Inc. makes every effort to prevent printing errors.  However, you may occasionally encounter error messages in the form of pop-up windows.  Some messages are relatively simple while other can be lengthy and contain somewhat cryptic symbols or abbreviations.  Here's what you can do if you run into this:

- ➢ **Write down the message as completely as possible.**  Better yet, press ALT+Print Scrn on your keyboard to copy the window, paste it into an email message or Notepad, and print a copy.  If you receive more than one error window, do this for each message.  The exact wording of the messages is important in troubleshooting the exact cause.
- ➢ **Try to recall your steps before receiving the error.**  In order to find the cause of the problem, it is important to be able to duplicate it, if possible.  This will assist Computer Arts personnel in their troubleshooting.  If necessary, try to write down the names of the windows displayed and options selected before you received the error message(s).
- ➢ **Contact Computer Arts help desk 800-365-9335**.  The help desk technicians can help resolve the problem or refer you to another CAI employee to help you.  It is important that you have the text of the error messages in front of you when you call.

**When I launch a report, nothing comes out of the printer or nothing happens at all.**

The causes of problems like this range from slow printing performance to incorrect printer installation.  Here's what to look for:

- ➢ **Consider the size and length of the report.**  Every effort is made by CAI to optimize report processing and performance.  However, many reports have to process a great deal of information and may take some time to print or display on your screen.  If reports are taking a very long time to print, contact your CAI help desk at 800-365-9335.
- ➢ **Check the status of the printer.**  Problems of this type can result from a printer being offline or disconnected from the server.  Sometimes, error messages will be displayed on the printer itself.  Check to make sure the printer is online and, if any errors are displayed, look them up in your printer documentation or help text to determine the cause.
- ➢ **Check our printer installation.**  This kind of problems can also be caused by an incorrect installation of a printer driver on your PC.  To check this, click on your Windows Start icon, select Control Panel, Devices and Printers.  This will display all of the printers installed on your PC.  Right click on the icon for your printer you sent your report to and select the Properties options.  Click the Print Test Page button and check the printer to make sure the page printed correctly.  If so, the problem is not with your printer installation or connection.
- ➢ **Contact Computer Arts Help Desk 800-365-9335**.  The help desk technicians can help resolve the problem or refer you to another CAI employee to help you.

**When I print a report, some fields are cut off along the margins.**

Reports designed with Crystal Reports tool used in the Recording System may print differently based on various printers and printer drivers used.  While every effort is made to reduce these differences, you may encounter a report where certain fields or even the entire reports seems to be cut off along one or more of the margins.  If you encounter this problem, contact the Computer Arts Help Desk at 800-365-

9335 for assistance in checking the compatibility of your printer or determining whether the reports needs to be reformatted.

**I exported a report to Excel or Word file, but the person I sent the file to can't open it.**

This problem generally occurs when the PC being used to open the file does not have MS Excel or Word installed.  If this the case, the software will need to be installed on the PC.  Alternatively, another PC that has the software installed can be used to open the file.

**When I export a report to Excel or Word, I lose some of the report formatting.**

Because of the many different methods used by software programs to format documents and spreadsheets, it is common to lose some design and formatting features when exporting reports to other software. Some of the most common formatting feature lost during export include shading, lines, boxes, and page headers.

The best way to avoid loss of formatting in exported documents is to ensure that the format used to export the file is compatible with that used by the software that will open the file.  When exporting MS Excel files, use the EXCEL 5.0 (XLS) or EXCEL 5.0 (XLS) (EXTENDED) format options.  It may also be helpful to experiment with different formats to find those that best preserve your report formatting.

## Location of System Reports

It may occasionally be difficult to find where in the program to generate a specific report, or to determine what distinguished one report from another.  To help you make sense of the Recording System reports, here is a summary of some of the report title and brief descriptions of what they include.  Also included are the names of the windows where the reports are found and the toolbar buttons used to print them.

| Report Title | Window Location & Report Description |
|---|---|
| *Blank Liquor License Application* | Main Menu.  Prints a blank Retail Alcoholic Beverage License Application. |
| *Cash Code List* | Main Menu.  Lists cash codes in ascending order by cash code. |
| *Catering Permit* | Catering Permit.  Catering Permit format approved by the County/State government.  Requires paper specifications to be met. |
| *Charge Code List* | Main Menu.  Lists charge codes in ascending order by charge code. |
| *Charges Report* | List Cash.  Lists information about all charges that occurred during a specified date range, groups charges by charge code, and provides a total amount for each charge code.  Detail report also page breaks by charge code. |
| *Index Condensed Direct* | List Instruments.  Lists instruments by grantor. Condensed version formatted to print landscape on |

legal-size paper with two columns. Report includes grantor name, grantee name, date, type code, and instrument number only.

*Index – Direct*

List Instruments. Lists instruments by grantor. Includes more information than the condensed version, including instrument time, type description, and description.

*Index – Indirect*

List Instruments. Lists instruments by grantee. Includes more information than the condensed version, including instrument time, type description, and description. If an instrument has no grantee, it will not appear on the report.

*Instrument Count*

List Instruments. (printed through Process or right click menus) Provides a count of instruments according to type.

*Instrument List*

List Instruments. . (printed through Process or right click menus) Provides a list of instruments recorded showing in descending instrument order, date, number of pages, fee amount and to whom the instrument was delivered.

*Instrument Type List*

Control Menu. Lists instrument types in ascending order by instrument type code.

*Instruments – By Number*

List Instruments. Lists instruments in ascending order by instrument number.

*Instruments – By Type*

List Instruments. Lists instruments in ascending order by instrument type.

*Liquor License Application Information*

Alcoholic Beverage License Application. Liquor License format approved by the County/State government. Requires paper specifications are met.

*Marriage License Verification*

List Marriage Licenses. Verification associated with marriage license. Can print automatically when marriage license is added.

*Receipt*

Display Instrument or Display Cash window (using Print button on display window). Provides a receipt for cash transactions. It may be printed automatically as your add cash or instrument records.

*Report List*

Control Menu. Lists all reports that are available in the system.

*Revenue Report*

List Cash. Details revenue information for a specified date range, including cash and charge transactions.

| | |
|---|---|
| *Revenue Summary* | Summarizes revenue information for each cash code for specified date range, including cash and charge transactions. |
| *UCC List* | List USS's.  Lists all USS extensions in ascending order by UCC extension number. |

# CHAPTER TEN

## Working with the Recording Control Menu

The Recording Control Menu contains a number of tools that allow you to maintain codes and other system information as well as define certain aspects of how the system will work.

**CAUTION!!!**

Because certain parts of the Control Menu contain settings and codes which affect the entire Recording System, changes must only be made by someone who is thoroughly familiar with the system and qualified to make these modifications.  Changes made from the Control Menu can dramatically affect the operation of the Recording System or prevent it from working entirely.  If you have any questions or doubts about making changes, contact Computer Arts, Inc. prior to doing so.

**Maintaining Instrument Types**

Instrument Type codes are used when adding instruments to define the kind of instrument being entered.  These codes also indicate whether the instrument involves a USS, is a lien, or a release, or has a default cost per page associated with it.

Because the information you need to enter for each type code is the same whether you are adding, copying, or changing Instrument Type, the instructions for these separate procedures have been combined.  Only the Add Instrument Type window is shown.

1. Click the Maintain Instrument Types button on the main toolbar.  The List Instrument Type window will display.
2. Do the following:
    a. Click the Add button to add a new instrument type.
    b. Select an instrument type form the list and click the Change button to change instrument type information for this code.
    c. Select an instrument type from the list and click Copy to create a new instrument type code with information similar to the one selected.
    d. Select an instrument type from the list and click Delete to delete the instrument type code selected.  Be aware that the Recording System will not let you delete a type code if it has been used to record one or more instruments.
3. Enter or change the information for this instrument type as needed.  If you are deleting a type code, continue to step 4.
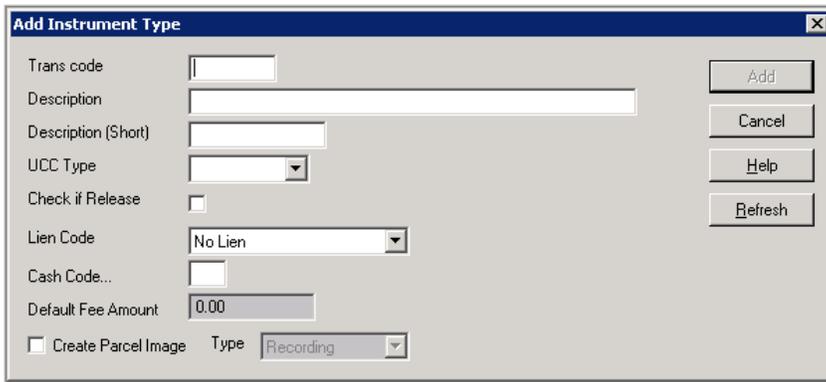


## Instrument Type Fields

This list describes data fields you will need to fill in when adding, changing, or copying an instrument type.

| | |
|---|---|
| *Trans Code* | The transaction code (required field), also known as the instrument type, is an alpha-numeric field up to six characters in length which is used to identify a type of instrument.  These codes represent categories such as agreement, mortgages, and wills.  Adding an instrument type make sit available for users entering instruments. |
| *Description* | The description for this instrument type (required) up to 35 characters in length.  Examples include Agreement, Bill of Sale, Death Certificate, Mortgage, etc. |
| *Description (Short)* | A short, abbreviated description of the instrument type (required field) up to 10 characters in length. |

*UCC Type*          The UCC type (required field) specifies what kind of UCC extensions are associated with this type of instrument.  Select the appropriate value based on whether instruments of this type involve New UCC, Old UCC, or no UC (the default is No UCC).  To view and select from a list of UCC types, click the arrow to the right of this field.

*Check if*          Check this field if the instrument type indicates a release (i.e., a release of a lien).

*Release*

*Lien Code*         The lien code (required field) specified whether the instrument type is automatically associated with a lien and whether the lien applies to both the grantor and grantee, or to one or the other.  Select the appropriate value based on whether this type is associated with a Lien on the Grantee, a Lien on the Grantor, a Lien on Both, or No Lien (the default is No Lien).  To view and select from a list of lien codes, click the arrow to the right of this field.

                    When you perform a lien search on names, liens will appear on grantors and grantees as designated by the lien code on the instrument type.

*Cash Code…*        The cash code (required field) determines the default fee amount that is used to calculate the instrument fee for this type.  The instrument fee is equal to the number of pages multiplied by the default fee and can be changed manually on individual instruments.  Cash codes are entered separately; see following instructions.  To view and select from a list of cash codes, click on the field and then press the F4 function key.

*Default Fee*       The default fee amount (required field) is the fee associated with the cash code entered above.
*Amount*            This amount appears after you select a cash code.  You cannot edit it on the cash code itself; see instructions following for more information.  This field shows 0.00 until a cash code is entered without a zero default fee amount.

4.  Click the Add or Change button, depending on the option selected above.  If you are deleting an instrument type, a window will be displayed for you to confirm the deletion of the type code.  Click the Delete button to complete the deletion of the code.

## Maintaining Cash Codes

Cash codes are used to establish default per-page fee amounts for individual instrument types.  Because the information you need to enter for each cash code is the same whether you are adding, copying, or changing a code, the instructions for the separate procedures have been combined.  Only the Add Cash Code window is shown.

1.  Click the Maintain Cash Codes button on the main toolbar.  The List Cash Codes window will display.
2.  Do the following:
    a.  Click Add to add a new cash code.
    b.  Select a cash code from the list and click Change to change cash code information for this code.
    c.  Select a cash code from the list and click Copy to create a new cash code with information similar to the one selected.

d.  Select a cash code from the list and click Delete to delete the instrument cash code selected.  Be aware that the Recording System will not let you delete a cash code if it has been used to record one or more instruments.

3.  Enter or change the information for this cash code as needed.  If you are deleting a cash code, continue to step 4.
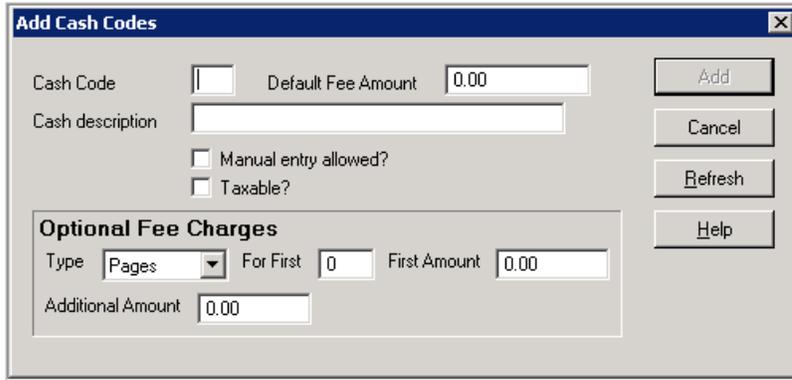


**Cash Code Fields**

These are descriptions of data fields you will need to fill in when adding, changing, or copying a cash code.

| | |
|---|---|
| *Cash Code* | The cash code is a two-character code that identifies this cash code and fee amount (required field). |
| *Default Fee Amount* | The default fee amount is the per-page default amount used when a cash transaction is added. This default amount can be changed on individual instrument records.  When entering a new cash code, the default fee amount defaults to 0.00. |
| *Cash Description* | A description of up to 25 characters for this cash code. |
| *Manual Entry Allowed?* | Check this box if manual entry of a cash charge is allowed for this cash code.  If manual entry is allowed, a cash transaction with this cash code can be added without an associated instrument. |

4.  Click the Add or Change button, depending on whether you are adding, copying, or changing the cash code.  If you are deleting a cash code, a window will be displayed for you to confirm the deletion of the code.  Click the Delete button to continue or the Cancel button to exit without adding or changing the record.

## Maintaining Charge Codes

Charge codes can be used to accumulate recording charges for an agency or company to be charged at a later date.  Because the information you need to enter for each charge code is the same whether you are adding, changing, or copying a code.  The instructions for these separate procedures have been combined.  Only the Add Charge Code window is shown.

1. Click the Maintain Charge Code button on the main toolbar.  The List Charge Code window will display.
2. Do the following:
   a. Click the Add button to add a new charge code.
   b. Select a charge code from the list and click Change to change charge code information for this code.
   c. Select a charge code from the list and click Copy to create a new charge code with information similar to the one selected.
   d. Select a charge code from the list and click Delete to delete the instrument charge code selected.
3. Enter or change the information for this charge code as needed.  If you are deleting a charge code, continue to step 4.
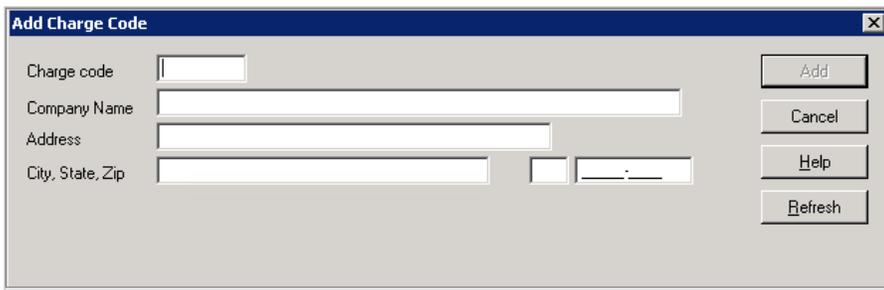
**Charge Code Fields**

| | |
|---|---|
| *Charge Code* | A code, up to six characters long that identified this charge code and charge account company (required field). |
| *Company Name* | The company name corresponding to the charge code (up to 40 characters in length).  Enter the name as you want it to appear on charge summary and detail reports that may be used for billing purposes. |
| *Address* | The address of the charge account company.  You may enter either the mailing or street address, |

depending on which value you want to store on the system.

*City, State, Zip*    The city, state, and zip code for the charge account company.  Enter these for wither the mailing or street address, depending on the address entered above.  The state should be entered using the two character postal code.

4. Click the Add or Change button, depending on whether you are adding, copying, or changing the charge code.  If you are deleting a charge code, a window will be displayed for you to confirm the deletion of the code.  Click the Delete button to continue or the Cancel button to exit without adding or changing the record.

**Changing Instrument Types**

There may be times when you need to change all the instrument of a certain type to another instrument type.

**CAUTION!!!**

Be extremely careful when using this option.  You will be asked to enter a "From" instrument type and a "To" instrument type.  When this procedure is completed, all instruments that were recorded using the "From" instrument type will be recorded under the "To" instrument type.  If you perform this procedure by mistake, you cannot simply reverse the changes you just made, but will also change all instrument originally recorded using the "To" instrument type.

1. Click the Change Instrument Type button on the main toolbar.
2. Enter the type code for those instruments to be changed in the From Instrument Type Code field and the new code for these instruments in the To Instrument Type Code field.
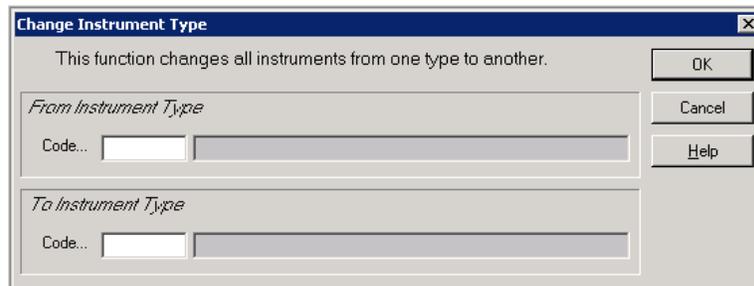


3. Click the OK button.  A window will be displayed asking you to confirm that you wish to continue with the change.
4. Click the Yes button on the confirmation window to continue.  If you do not wish to continue or are unsure, click the No or Cancel button.  Note that, if you continue, this process can take some time to complete.

## Editing the Recording Control File

The Recording Control File is used to set up the Recording System in the County and to define a number of aspects of how the system will work.
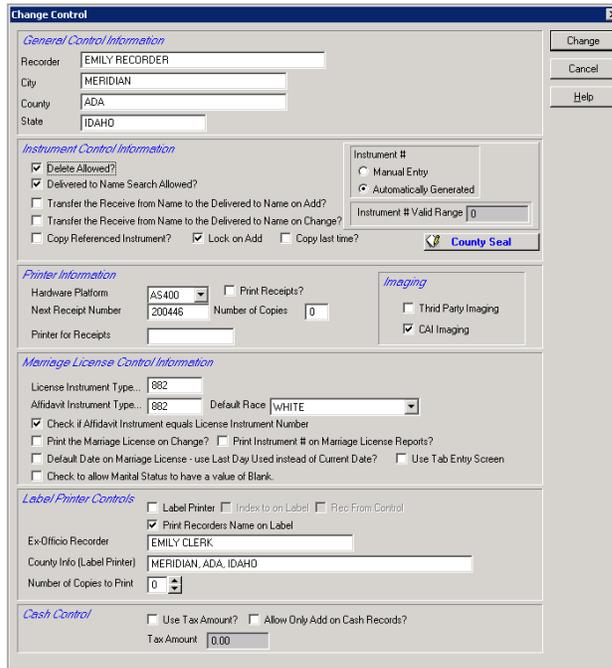
**CAUTION!!!**

Changing information in the control file can adversely affect the operation of the Recording System. Any modifications should be made only by qualified personnel. Please contact Computer Arts, Inc. prior to making any changes to the control file.

1. Click the Edit Recording Control File button on the main toolbar. The Change Control window will be displayed.
2. Enter or change the information for the control file as needed.

**Control File Fields**

Below are descriptions of data fields you will need to fill in when modifying control file information.



**General Control Information**

| | |
|---|---|
| *Recorder* | The full name of the county recorder. Enter the name as you want it to appear on marriage licenses (usually first-middle-last order). |
| *City* | The name of the city that is the county seat. Enter the name as you want it to appear on marriage licenses. |
| *County* | The county name. Enter the name as you want it to appear on marriage licenses and at the top of all system reports. Do not include the word "County" in this field. |
| *State* | The name of the state in which county is located. Enter the state's name as you want it to appear on marriage licenses. You may want t spell out the name completely rather than using the Postal Service 2 letter abbreviation. |

**Instrument Control**

## Information

| | |
|---|---|
| *Delete Allowed?* | Check this box if your county allows recorded instruments to be deleted form the system.  If this box is blank, instruments cannot be deleted. |
| *Delivered to Name Search Allowed?* | Check this box if you wish to use the delivered-to name search.  If this box is checked, you will be able to search and select previously entered "delivered-to" names when adding and updating instruments. |
| *Transfer the Receive from Name to the Delivered To Name on Add?* | Check this box to transfer received from name to the delivered to name when adding an instrument to the Recording system. |
| *Transfer the Receive from Name to the Delivered to Name on Change?* | Check this box to transfer received from name to the delivered to name when changing an instrument to the Recording system. |
| *Copy Referenced Instrument?* | If an instrument is referenced, make this selection to automatically copy the referenced instrument. |
| *Lock on Add* | This allows one user at a time to enter instruments, licenses, and other records when the selection for Lock on Add is made.  This only functions at this level if the Instrument # Auto Generated box is checked. |
| *Copy last time?* | This option is for Instrument # Manual Entry only.  If Copy last time is not checked, the system will automatically enter current date and time.  Otherwise, date and time must be manually entered on the insruments. |
| *Instrument # Manual Entry* | Turn on the manual entry radio button if more than one person will be entering instruments at the same time.  When this box is checked, the instrument range (below) will need to be filled in.  Turn on the Automatically Generated radio button if only one person will be entering instruments.  Note – Users cannot toggle between manual entry and automatic and then decide to revert to automatic, contact Computer Arts for assistance. |
| *Instrument # Automatically Generated* | Select this option if your county elects to have instrument numbers generate from the system rather than manually entering them. |
| *Instrument # Valid Range* | This field becomes necessary when the Manual Entry radio button is turned on.  Manual entry is utilized when more than one person will be entering instruments at the same time.  For example, if the range is 30, and if the last instrument number was 235739, then the instrument number that is being manually entered cannot be greater than 235769 and cannot be less than 235709. |
| *County Seal* | This is where a .bmp file of your county seal is uploaded to appear on certain reports. |

## Printer Information

| | |
|---|---|
| *Hardware Platform* | The hardware platform your county uses for the Recording System.  DO NOT change this field without first contacting Computer Arts, Inc.  To view and select from a list of values, click the down arrow to the right of the field.  Values consist of AS400 and ODBC. |
| *Next Receipt Number* | When you initially setup the system, enter the receipt number with which you want |

to begin in this field (must be a whole number).  The next receipt generated by the system will be this value and will be incremented automatically.  You can change the next receipt number at any time if necessary.

| | |
|---|---|
| *Printer for Receipts* | If you are using AS400 platform, enter the printer ID for printing receipts.  IF you have an AS400 platform and this field has a printer ID, receipts will print directly from the AS400, rather than through the Crystal Reports interface. |
| *Print Receipts?* | Check this box if you want receipts to print automatically when adding instruments and cash transactions. |
| *Number of Copies* | Indicates the number of copies to be printed when a receipt is generated. |

**Imaging**

| | |
|---|---|
| *Third Party Imaging* | Make this selection if your county is not using Computer Arts Imaging software. |
| *CAI Imaging* | Make this selection if your county is using Computer Arts Imaging software to scan and view images. |

**Marriage License Control Information**

| | |
|---|---|
| *License Instrument Type…* | The default marriage license instrument type.  This instrument will be automatically be assigned to all marriage licenses entered into the system. |
| *Affidavit Instrument Type…* | The default marriage license affidavit instrument type.  This instrument type will be automatically be assigned to all marriage license affidavits. |
| *Default Race* | The default race that appears when entering bride and groom information in a marriage license.  To view and select from a list of races, click the down arrow to the right of this field. |
| *Check if Affidavit Instrument equals License Instrument Number* | Mark the box next to this field if you want marriage license affidavit instrument numbers to equal the marriage license instrument numbers.  When this box is checked, the system will automatically enter the license number for you. |
| *Print the Marriage License on Change?* | Mark this box if you want the option to print a marriage license from the Change field. |
| *Print Instrument # on Marriage License Reports?* | Check this box if you want the instrument number to print on marriage licenses. |
| *Default Date on Marriage License – use Last Date Used instead of current date?* | Select this to have the ability to use the last date a marriage license was entered. |
| *Use Tab Entry Screen* | Use this option to have tab entry selections on marriage license. |
| *Check to allow Martial Status to have a value of Blank* | If you want marital status on a marriage license to be blank, select this option. |

**Label Printer Controls**

| | |
|---|---|
| *Label Printer* | Check this box if your county uses a label printer to produce labels used for recording instruments. |
| *Index to on Label* | Check this box if you wish to have the instrument type code, or "index to" printed on labels.  This applies only to counties using a label printer. |
| *Rec from Control* | |
| *Print Recorders Name on Label* | Select this option to have the Recorder's name printed on labels. |
| *Ex-Officio Recorder* | County Recorder |
| *County Info (Label Printer)* | Check this box if county information is to be printed on labels.  This will normally be something like "Anywhere County, Idaho". |
| *Number of Copies to Print* | Defaulted to 1.  Use arrows to the right of the field to make a selection other than one. |

**Cash Control**

| | |
|---|---|
| *Use Tax Amount?* | If your county charges state tax for recordings, copies, etc., select this option. |
| *Allow Only Add on Cash Records?* | Select this option for tax amount to automatically add upon recording. |
| *Tax Amount* | Enter tax amount that your county charges. |

3.  Click the Change button to save changes.  Click Cancel or press the ESC key on our keyboard to exit the Control File window without saving changes.

## Editing the Liquor License Control File

The Liquor License Control File is used to set up the Liquor-Beer License defaults and fees in the City/County.
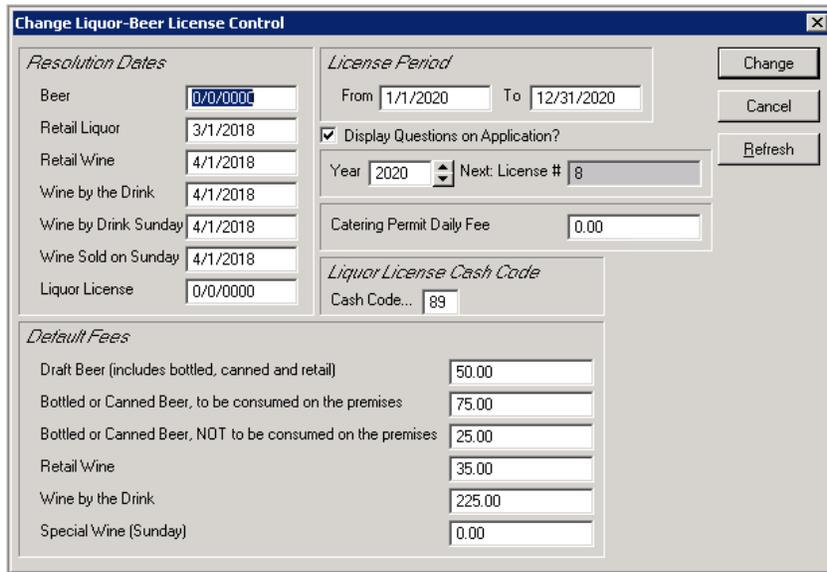
**CAUTION!!!**

Changing information in the liquor control file can affect the license fees and license periods of Liquor-Beer Licenses applied for and approved in the Main Menu of the Recording System.  Any modifications should be made only by qualified personnel.

1.  Click the Liquor Control File button on the main toolbar in the control menu.  The Change Liquor-Beer License Control window will display.

2.  Add or change resolution dates, license period, year, and daily catering permit fee and/or default fees.
3.  Click Change when finished to edit settings and return to the Control Main Menu.

**Liquor-Beer Control File Fields**

Listed in this section are descriptions of data fields you will need to fill in when modifying liquor-beer license control information.



Resolution Dates:

*Beer*                Date resolution was passed by city/county government to sell beer.

*Retail Liquor*       Date resolution was passed by city/county government to sell retail liquor.

*Retail Wine*         Date resolution was passed by city/county government to sell retail wine.

*Wine by the Drink*   Date resolution was passed by city/county government to sell beer.

*Wine by Drink Sunday*  Date resolution was passed by city/county government to sell wine by drink on Sunday.

*Wine Sold on Sunday*  Date resolution was passed by city/county government to sell wine on Sunday.

*Liquor License*      Date resolution was passed by city/county government to sell liquor licenses.

Default Fees:         Yearly default fees set by city/county government to sell the following:

                      Draft Beer (includes bottled, canned, and retail)

                      Bottled or Canned Beer, to be consumed on the premises

                      Retail Wine

Wine by the Drink

Special Wine (Sunday)

4. Click the Change button to save changes.  Click Cancel or press the ESC key o exit the Liquor-Beer License Control File window without saving changes.

**Searching for a Deleted Liquor-Beer License**

1. Click the Liquor License Deleted File on the main toolbar.  The List Liquor License Deleted File will display.
2. Now highlight the license within the grid that you desire to display and click the Display button. The Display Liquor License Deleted File screen will display showing information from the just previously highlight license in all completed fields.
3. When finished, click the OK button to return to the Liquor License Deleted File window.

## Unlocking Records for Maintenance

The record unlock feature is used when a data entry procedure is prohibited due to a record lock condition.  A record lock usually occurs when the add instrument program in Recording System ends abnormally due to a power failure or incorrect exit procedure.

To remove a record lock, click the Unlock Instruments for Maintenance on the Control Menu toolbar.  A window will be displayed asking if you wish to continue.  Click the Yes button to unlock instrument records and continue with data entry.

**Maintaining Reports**

The Maintain Reports button displays a window that provides for the setup and definition of reports used throughout the Recording System.  Clicking this button will display a list of reports available in the system and allow for the addition and modification of reports by Computer Arts, Inc.

**CAUTION!!!**

Instructions for changing system report information are not included in this manual.  These modifications should only be made by Computer Arts personnel or by qualified county personnel under the direction of a Computer Arts, Inc. employee.