Tag Application

The Registration and License Management system is an Alabama Department of Revenue (ADOR) compliant web application that streamlines the processing of both walk-in and online customer vehicle, boat, manufactured home, and business licenses.
Below are a few of the special features that are built into the application:

- **Simple and intuitive navigation**
- **Easy and accurate handling of escape tax calculations**
- **Drop down menus with descriptions rather than codes**
- **Flexible reporting leveraging new technology tools**
- **Improved accuracy related to the extensive use of field-level checks, drop down inputs, and text completion features**
- **Search capabilities utilizing predictive text and auto-complete functions**
- **ETAPS integration**
- **Integrated fleet renewals**
- **Integrated online renewals**
- **Email renewal notifications**

The Registration and License Management system is also known as the "Tag App".
This help documentation provides:

- **Information about various special fields that help reduce data entry time and streamline processes for the County**
- **Description of some important business rules and laws governing the issuance of tags**

Application Components

The Tag App has eight primary application components:

- **Auto - for vehicle registration transactions**
- **Boat - for boat registration transactions**
- **Business - for business license registration transactions**
- **Mobile - for manufactured homes registration transactions**
- **Placard - for issuing auto disability placards**
- **Dealer - for vehicle registration transactions**
- **Commit - for prepurchasing new tag designs**
- **Admin - for administrative tasks**

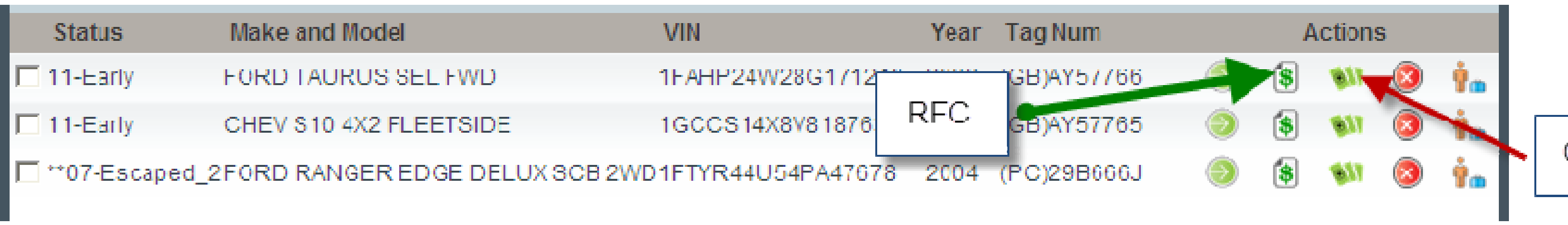
To access an application component, click on the component button at the top of the page:

Vehicles

Special Fields

RFC and C2P

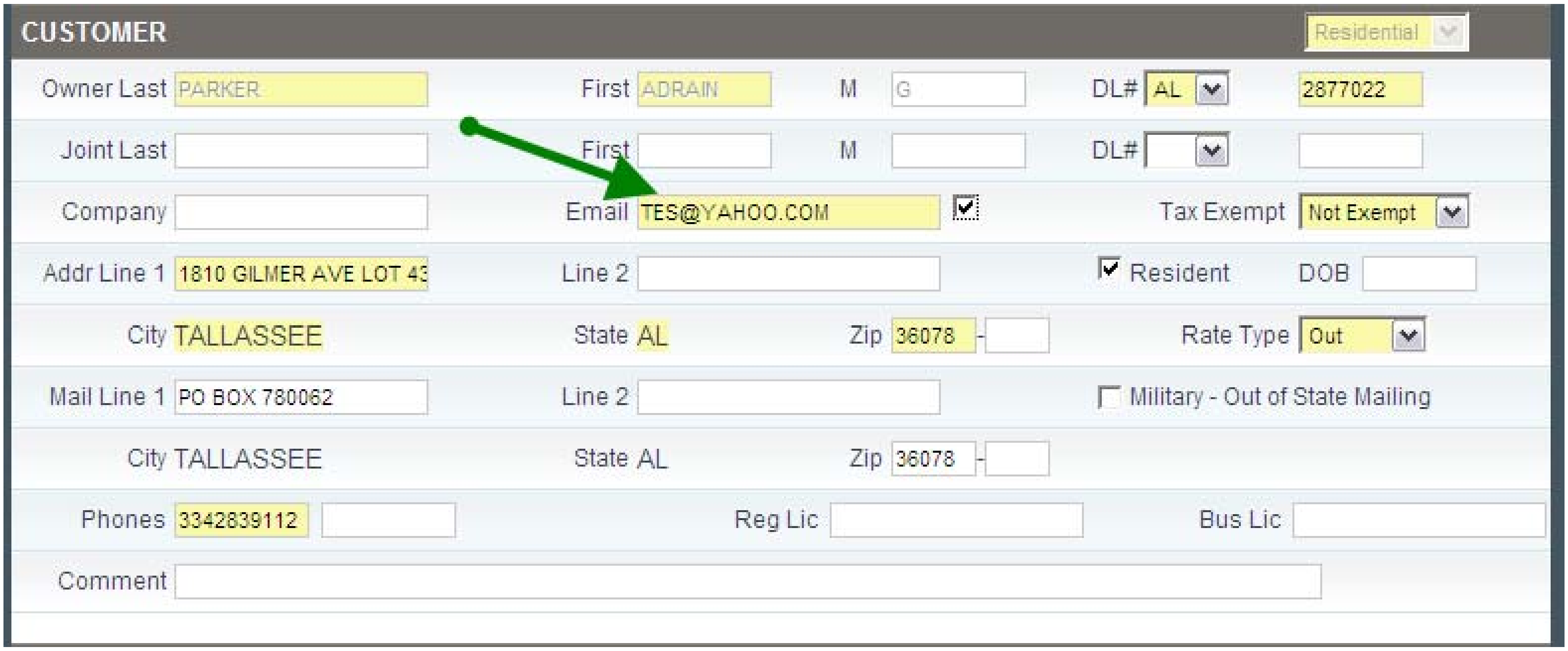
A 'RFC' and a 'Commitment to Purchase' can be started from the automobile search screen by selecting the appropriate icon.



Email Notice

To reduce mailing costs, the County is encouraging customers to receive email notifications for renewals. For new customers, the customer's email address is required unless the 'Email Notice' checkbox is unchecked. The tag application will automatically verify the legitimacy of the email address. When renewing tags, be sure to ask the customer if they would like to receive their renewal notification via email.

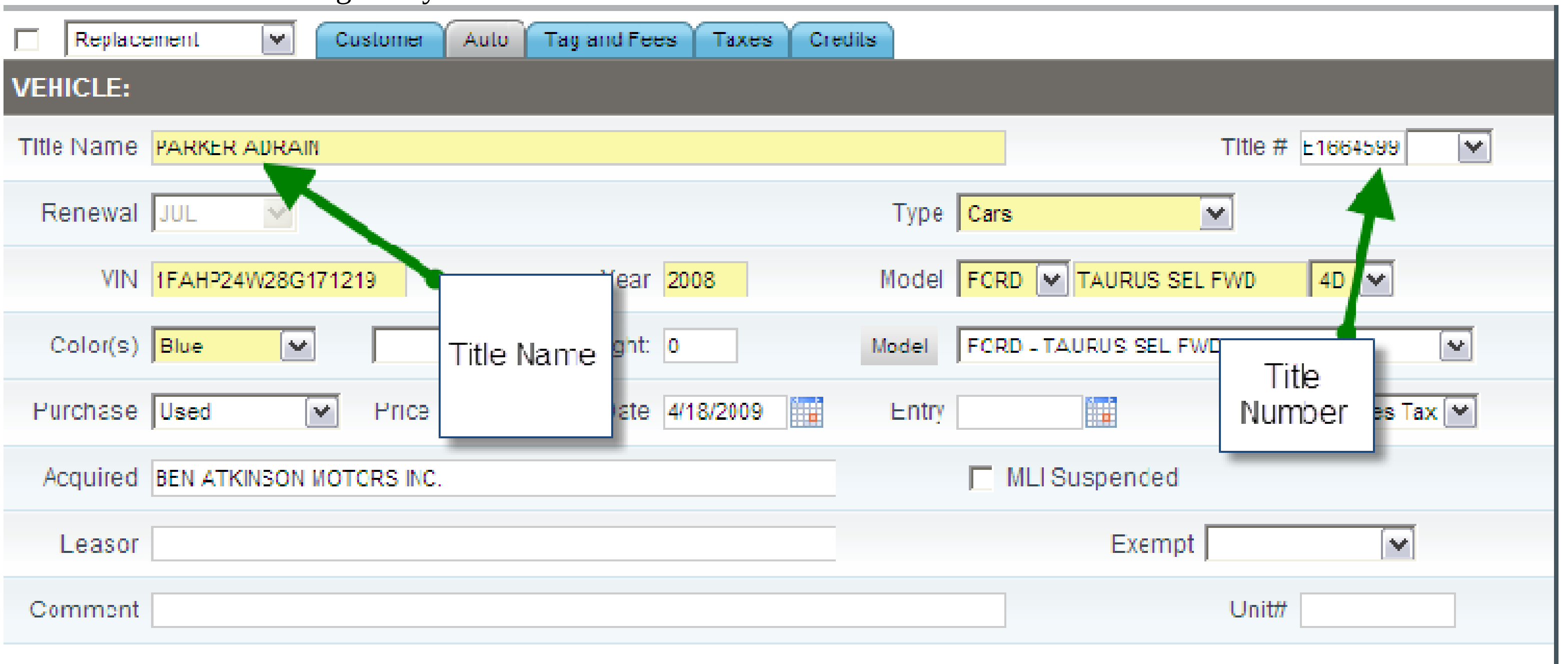
Here is a screen shot of the Customer data entry page with the email address and Email notice checkbox:



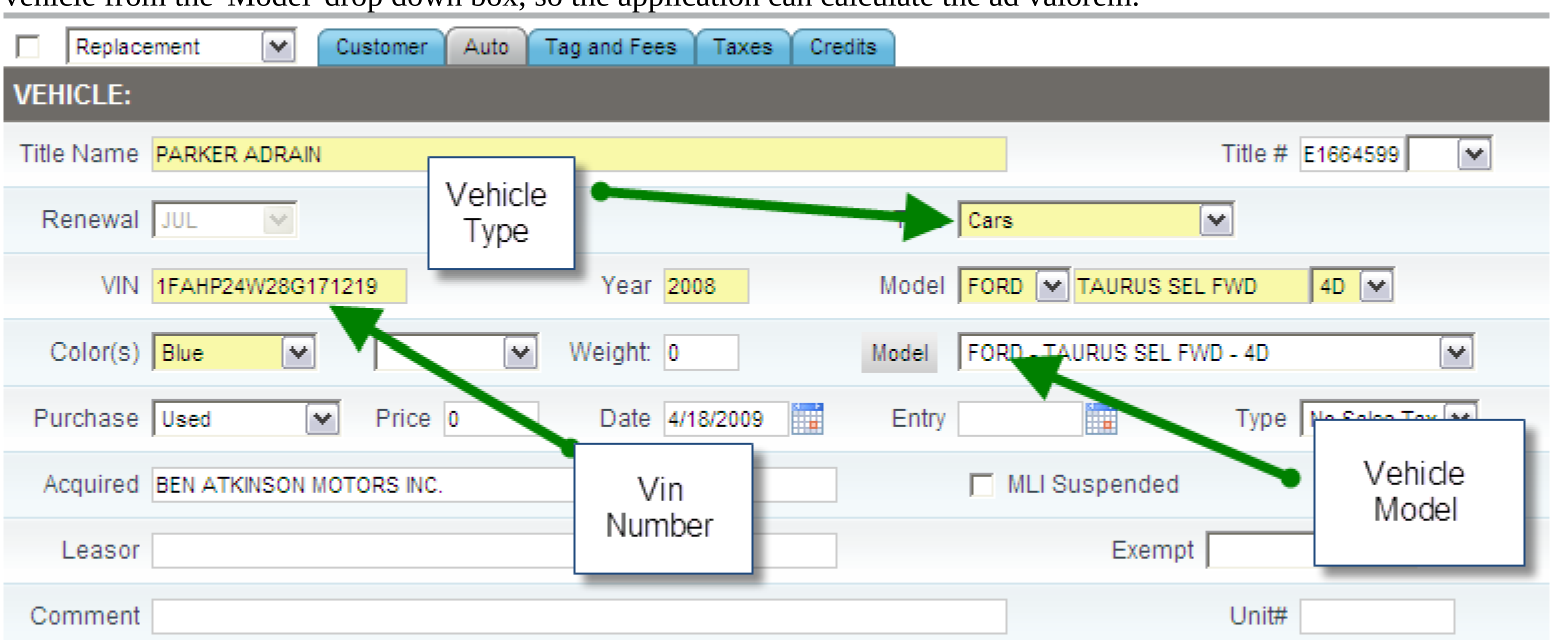
Auto Tab

The 'Auto' tab and its fields are unique to the 'Auto' business module.

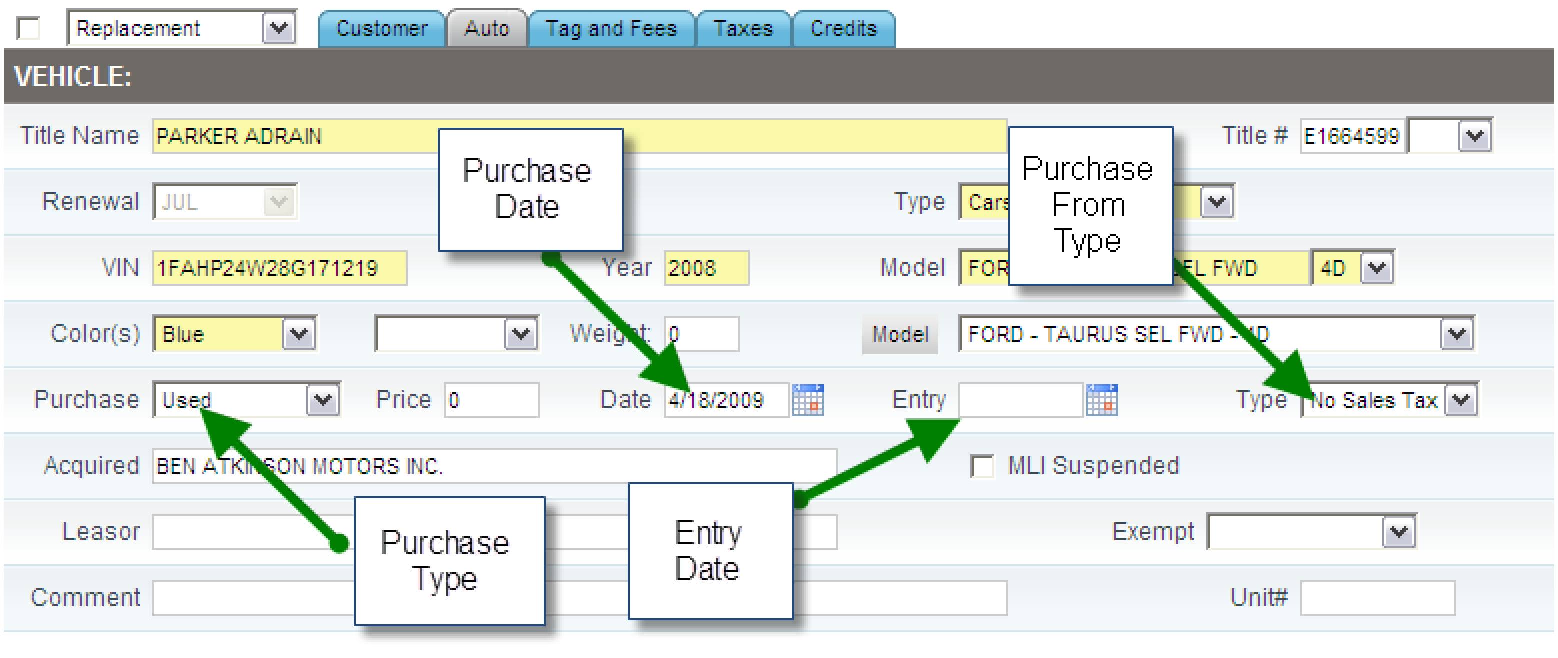
The 'Title Name' contains the owner of the vehicles name and is the name that will print out on the receipt. The 'Title #' is the ETAPS number assigned by the state.



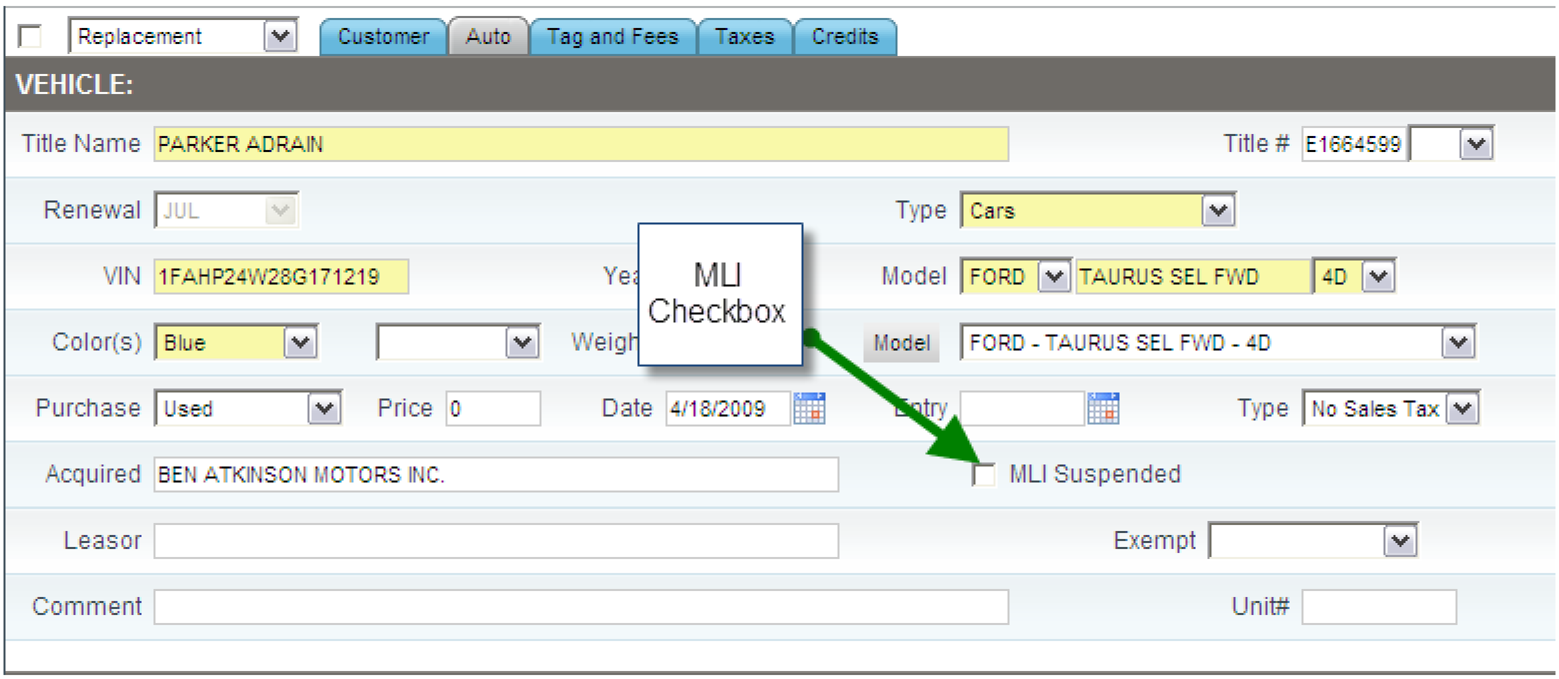
Also on the 'Auto' tab is the 'Vehicle Type' drop down box, the 'Vin' textbox, and the vehicle 'Model' drop down box. The auto year and the 'Model' drop down box are automatically populated by the VIN number. You must select the vehicle from the 'Model' drop down box, so the application can calculate the ad valorem.



The 'Purchase' drop down box will dictate if the taxes will be deferred or will be paid. If the purchase type is 'New' the taxes will be deferred. The 'Date' textbox refers to the purchase date and will control the tax start date during a New Registration. If the customer is coming from out of state that date should be entered in the 'Entry' date. This will override the purchase date and will control the tax start date. The 'Type' dropdown will decide if the customer will pay sales tax.

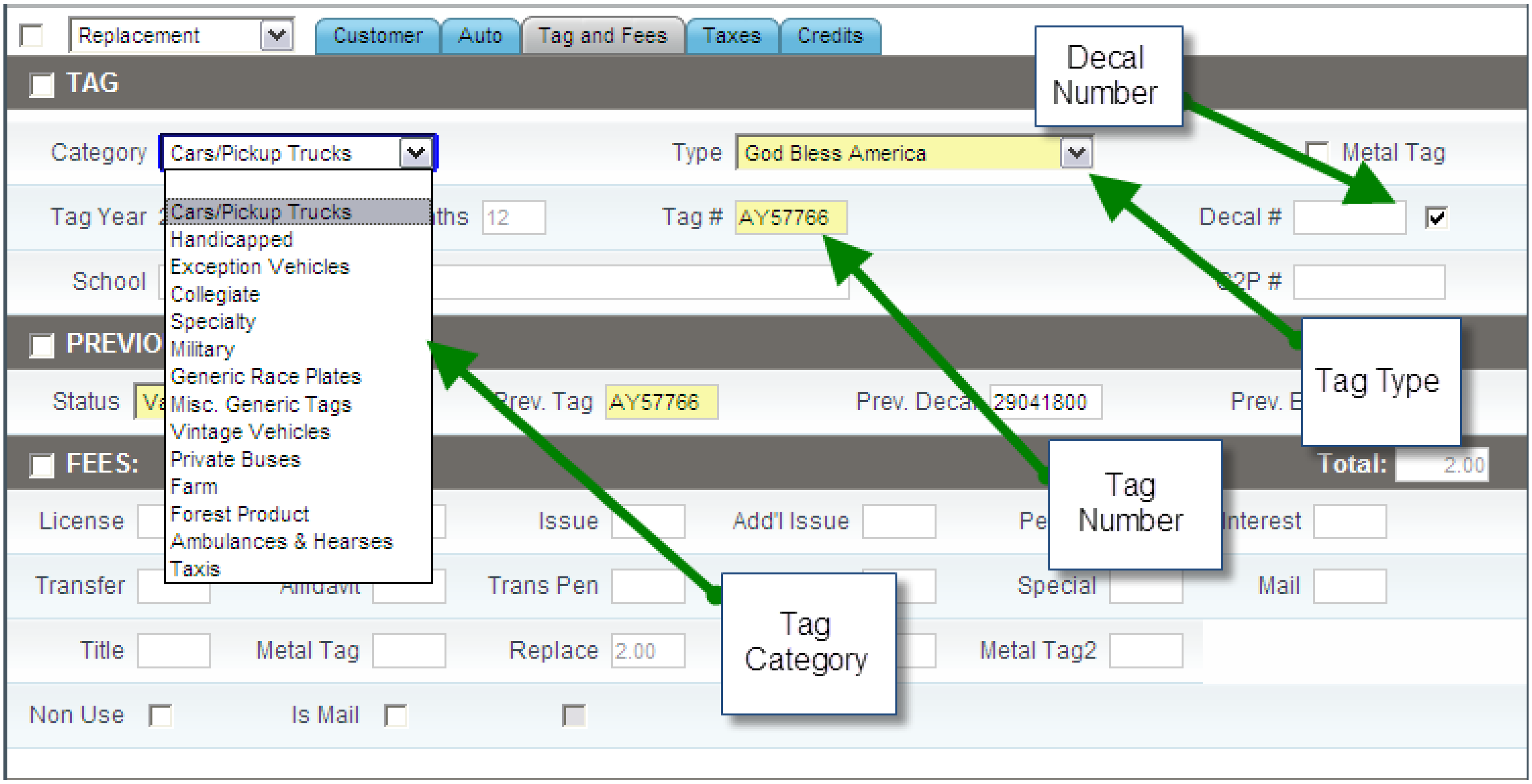


When the 'MLI' suspended checkbox is checked the clerk will not be able to renew the tag. During a MLI_Only transaction the box needs to be unchecked.

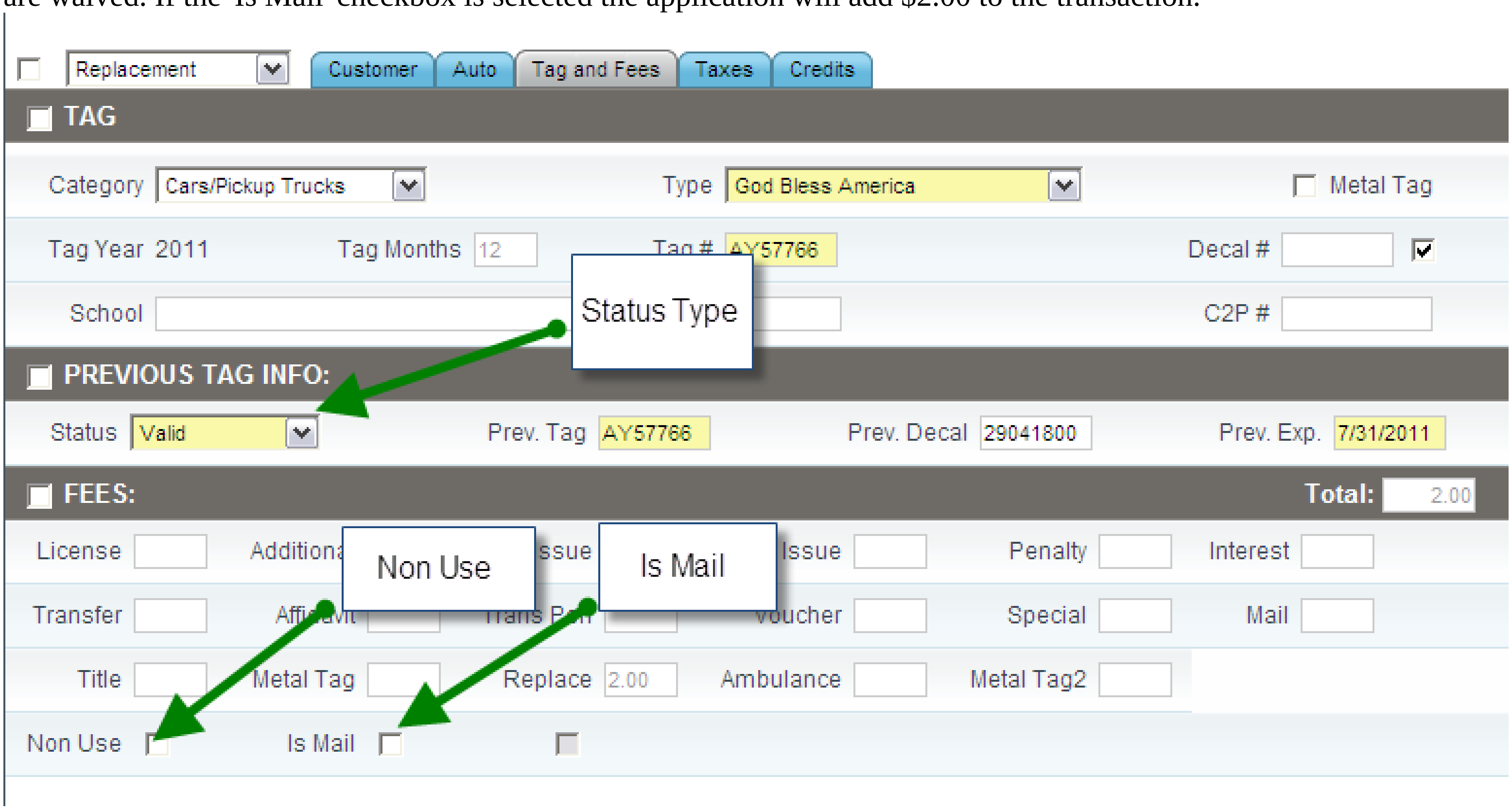


Tag and Fees Tab

The 'Tag and Fees' tab and its fields are unique to the 'Auto' business module.
The 'Tag Category' contains all of the higher level tag groups which are made up of 'Tag Types'. For example, the 'Cars/Pickup Trucks' category contains the 'God Bless America' tag type. This tab also has the 'Tag #' textbox. When this textbox is hovered over the tag format will show up. If the 'Decal' checkbox is checked the application will automatically assign a decal.

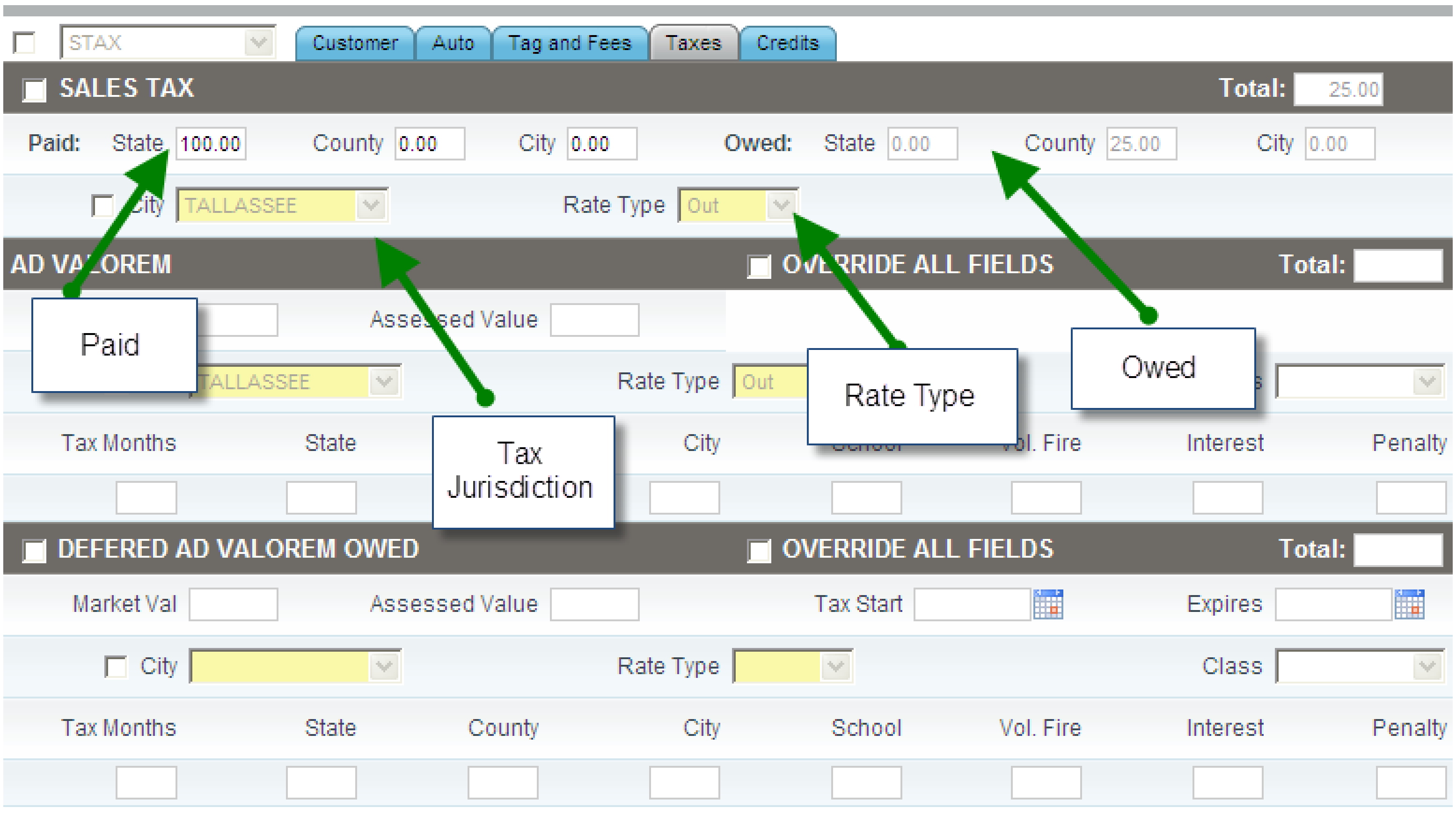


The previous tag information is used to decide the expiration date on renewals and the back taxes on 'New Registrations' and 'Transfers'. By selecting 'None' from the 'Status' drop down box the application will charge 12 months of back taxes. When the 'Non Use' checkbox is checked during an 'Escape' transaction the penalty and tag fees are waived. If the 'Is Mail' checkbox is selected the application will add $2.00 to the transaction.

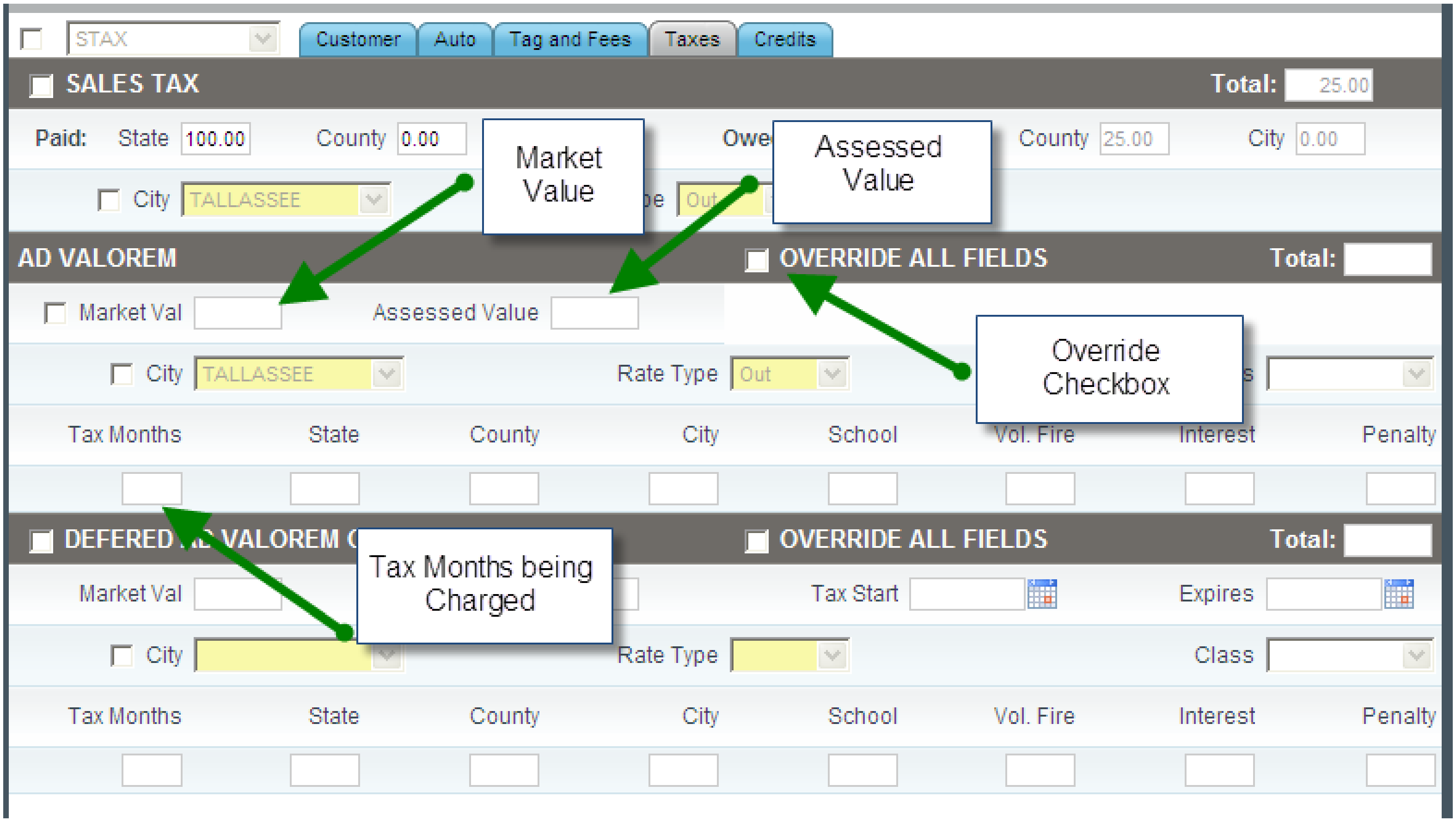


Taxes Tab

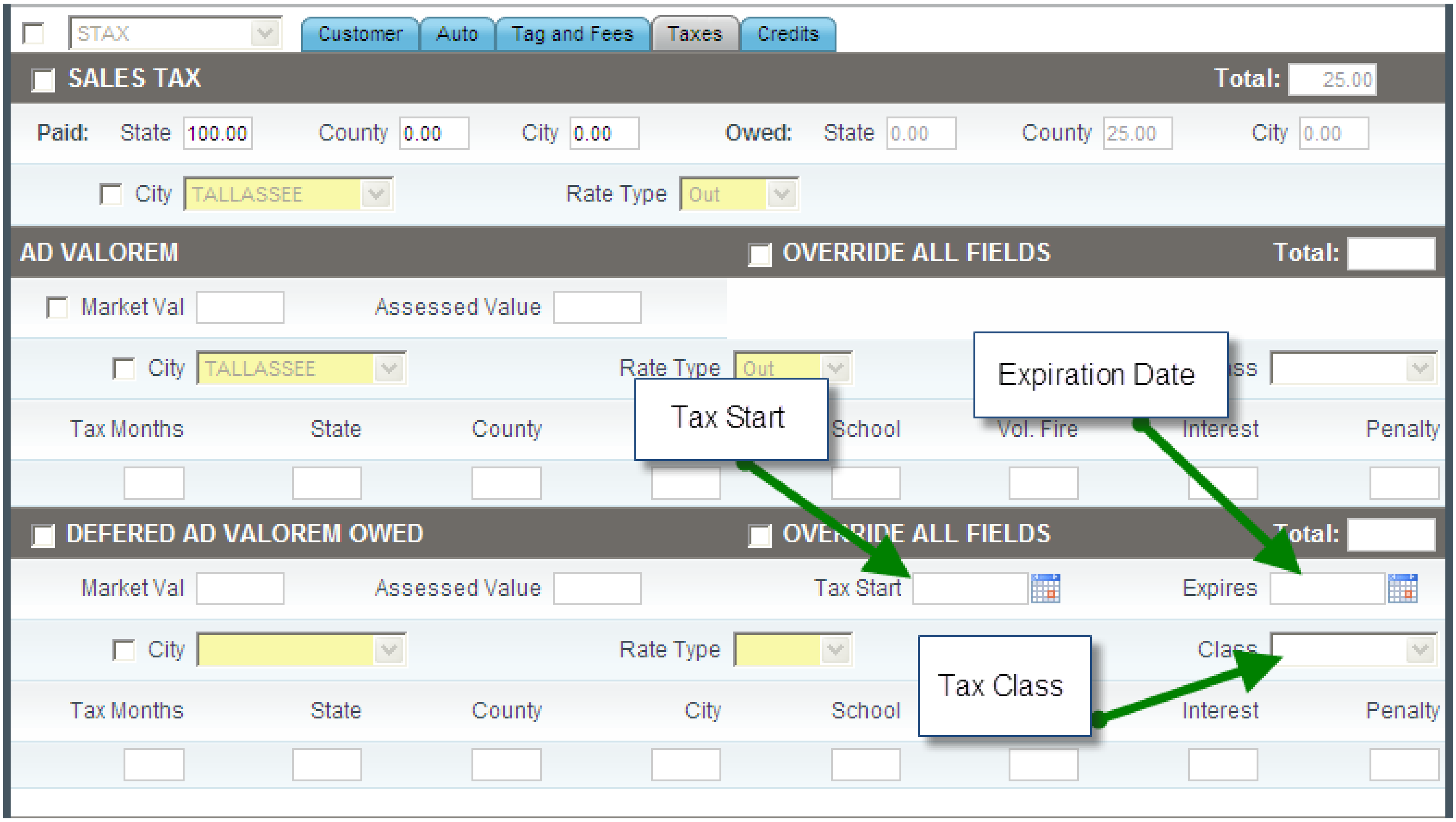
The 'Tag and Fees' tab and its fields are unique to the 'Auto' business module. The Sales Tax is automatically calculated by the application based on the vehicle purchase price and the city that the customer lives. If a customer has paid a portion of their tax they should enter that amount in the 'Paid' textbox that corresponds with the tax that has been paid. When a customer's tax jurisdictions are different from their physical address select the ‘City’ checkbox and choose which 'City' and 'Rate Type' that matches their address.



The Ad Valorem is automatically calculated by the application based on the vehicle's market value and the city that the customer lives. The 'Market Value' is set by the state and the 'Assessed Value' is calculated based on the customer's tax class. When a customer's tax jurisdictions are different from their physical address select the ‘City’ checkbox and choose which 'City' and 'Rate Type' that matches their address.



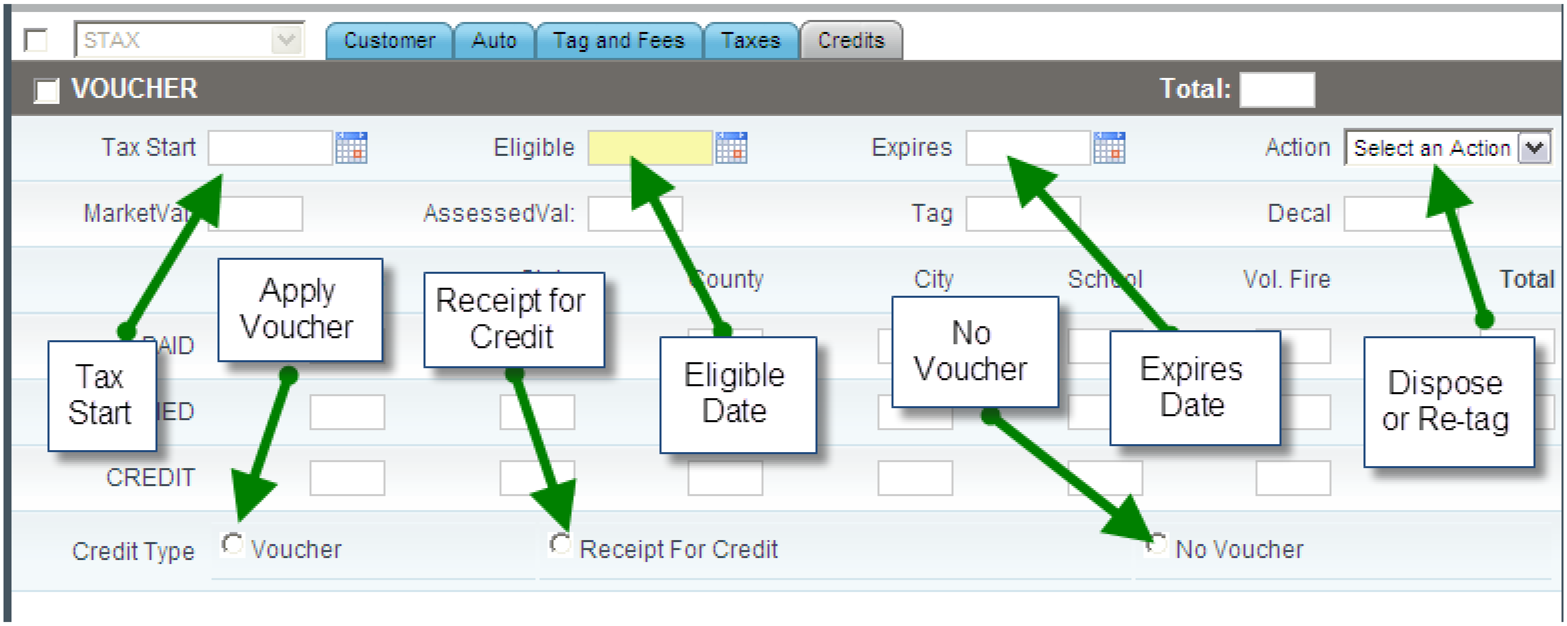
The Deferred Ad Valorem Owed is automatically calculated by the application based on the previous year's New Registration transaction. The 'Market Value' is set by the state and the 'Assessed Value' is calculated based on the customer's tax class. When a customer's tax jurisdictions are different from their physical address select the 'City' checkbox and choose which 'City' and 'Rate Type' that matches their address.



Credits Tab

The 'Credits' tab and its fields are unique to the 'Auto' business module.

The 'Credits' tab shows the amount of tax that is owed to the customer. The 'Tax Start' and the 'Expires' Date are populated based on the previous transaction done in the application. The clerk must manually enter the 'Eligible' date so that the system knows how many months of credit the customer is due. The clerk must choose to 'Dispose' or 'Re-Tag' the vehicle that is eligible for the credit from the 'Action' drop down. If the clerk chooses 'Re-tag', 'No Voucher' is automatically selected. If 'Dispose' is selected the clerk must decide to apply the 'Voucher' or give the 'Receipt for Credit'.



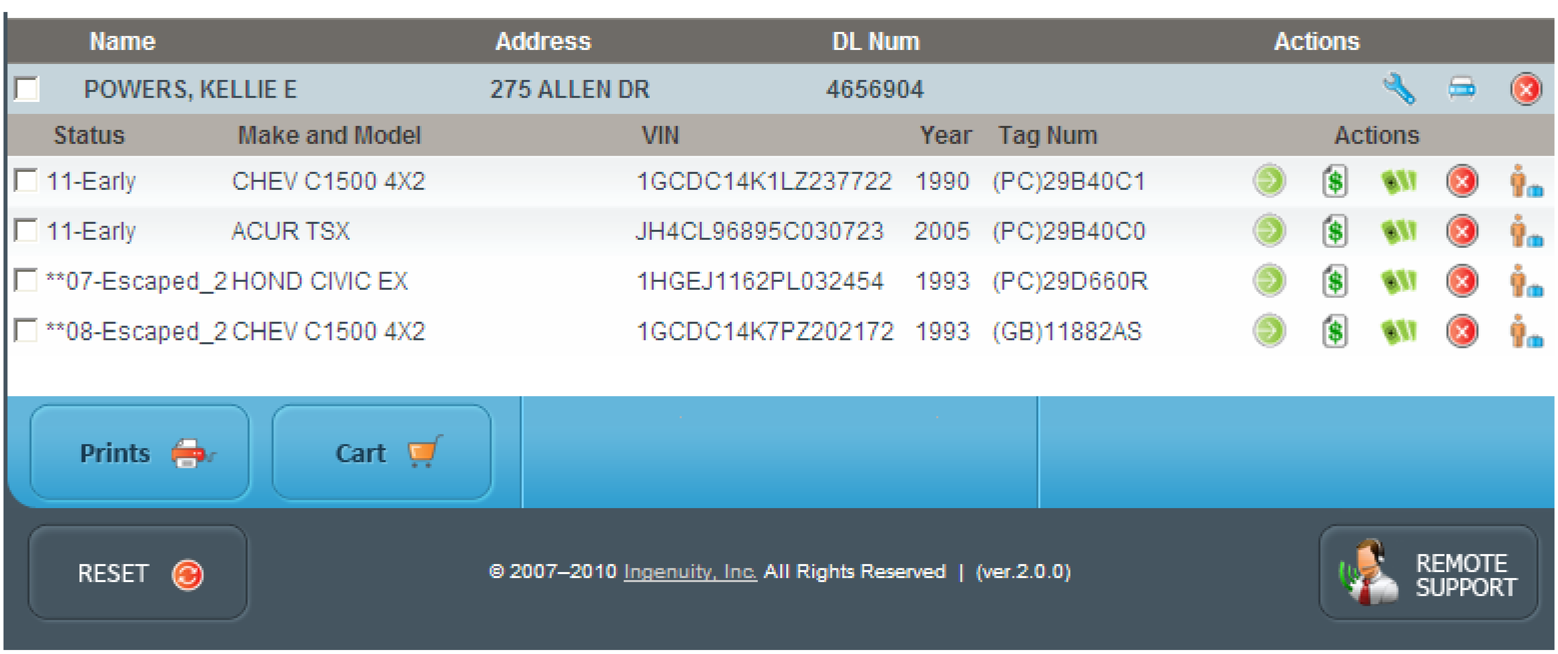
Vehicle Status

All vehicles in the system have a tag status which is displayed in the search page.
Vehicle status is shown in the form "yy-status" where:

- **"yy" represents the registration year and**
- **"status" is one of the following:**
  - Early - registration is valid and the current tag is within the current registration period
  - On_Time - customer has been notified, registration must be renewed prior to month end
  - Late - renewal date has passed, customer will be assessed a late fee and interest on back taxes
  - Escaped - renewal date is more than 12 months past due, customer will be assessed additional fees

If a vehicle's status is Late or Escaped, the system will automatically calculate the late fees and penalties that the customer must pay when the vehicle's registration is renewed or transferred.

The following screen shot shows 4 cars registered by Kellie Powers. Two are "Early", and two are "Escaped":



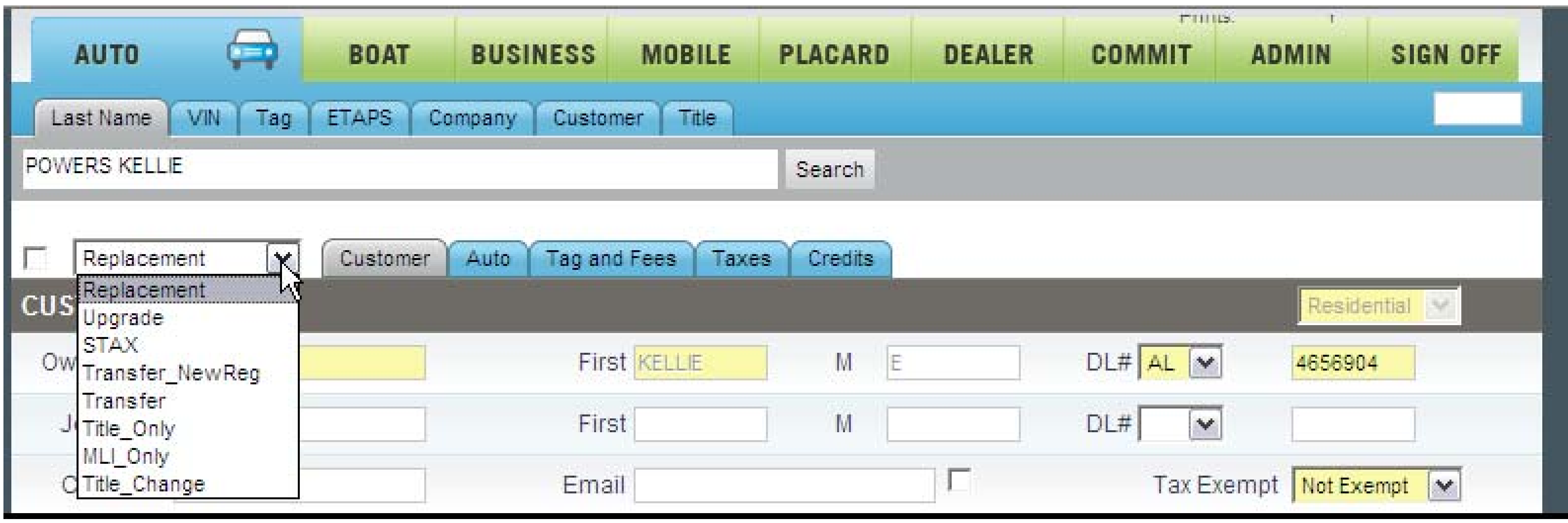
To perform a transaction for a vehicle, click on one of the "transaction" icons on the search page.

To see what each icon represents, hover over that icon and an explanation will appear.

Clicking on the "Select Auto" icon  will move you to the customer tab where you can select the transaction you want to execute for the vehicle. The type of transaction allowed for a vehicle will will depend on the vehicle's status according to the following table:

Status:	**Early**	**Late** **On_Time**	**Escaped** **Escaped_2**
Transactions:	Replacement Upgrade STAX Transfer_NewReg Transfer Title_Only Title_Change MLI_Only	Renew MLI_Only Transfer_NewReg Temp_Tag IRP_Renew	Escape MLI_Only Transfer_NewReg Temp_Tag IRP_Renew

Use the drop down list to the left of the customer tab to select the transaction. For example, if the vehicle's status is "Early", the available transactions can be shown by clicking on the down arrow in the drop down list:



Vehicle Transactions

New Registration

Procedure:

- **With ETAPS**
  - Search the ETAPS number
  - If the customer already exist select 'New Auto' 
  - If the customer does not exist select 'New Customer' 
  - Fill in any customer or auto information that needs to be filled
  - Select tag category
  - Select tag type
  - Enter tag number

- Fees and ad valorem will automatically calculate
- Submit transaction

- **Without ETAPS**
  - Search for the customer
  - If the customer already exist select 'New Auto' 
  - If the customer does not exist select 'New Customer' 
  - Fill in customer information if it is a new customer
  - Fill in auto information
  - Select tag category
  - Select tag type
  - Enter tag number
  - Fees and ad valorem will automatically calculate
  - Submit transaction

- **With ETAPS and Back Taxes**
  - Search ETAPS number
  - If the customer already exist select 'New Auto' 
  - If the customer does not exist select 'New Customer' 
  - Fill in any customer or auto information that needs to be filled
  - Select tag category
  - Select tag type
  - Enter tag number
  - Enter in previous tag info to calculate back taxes
  - Fees and ad valorem will automatically calculate
  - Submit transaction

- **Without ETAPS and Back Taxes**
  - Search for the customer
  - If the customer already exist select 'New Auto' 
  - If the customer does not exist select 'New Customer' 
  - Fill in customer information
  - Fill in auto information
  - Select tag category
  - Select tag type
  - Enter tag number
  - Enter in previous tag info to calculate back taxes
  - Fees and ad valorem will automatically calculate
  - Submit transaction

Renew

The tag selected for a renewal must have a status of On_Time or Late

Procedure:

- **Basic Renewal**
  - Search for the specific tag
  - Select the auto that needs to be renewed
  - Ad valorem and fees will automatically be calculated
  - Submit transaction

- **Late Renewal**
  - Search for the specific tag
  - Select the auto that needs to be renewed
  - Ad valorem and fees will automatically be calculated
  - Penalty fees and interest will be calculated
  - Submit transaction

- **Escaped Renewal**
  - Search for the specific tag
  - Select the auto that needs to be renewed
  - Ad valorem and fees will automatically be calculated for the escaped year
  - The tag application will automatically renew the tag for the current year
  - Submit transaction

- **Renewal that requires a new tag**
  - Search for the tag that is currently on vehicle
  - Select the auto that needs to be renewed
  - Select the tag category
  - Select the tag type
  - Enter the new tag number
  - Ad valorem and fees will automatically be calculated
  - Penalty fees and interest will also be calculated (if late)
  - Submit transaction

Replacement

The customer needs to replace the tag and/or decal for the vehicle.

The vehicle must have an early status

Procedure:

- Search for the specific tag
- Select the auto that needs to receive a new tag and/or decal
- If new tag is needed, enter in the new tag number
- The decal and fees will automatically be added
- Submit transaction

Upgrade

The customer wants to change tags before the tag comes up for renewal.

Procedure:

- Search for the specific tag
- Verify that the status is early
- Select auto that needs to receive new tag 
- Select upgrade from the transaction type drop down box
- Choose the tag category
- Choose the tag type
- Enter in the new tag number
- Fees will be automatically calculated
- Select submit

STAX

Procedure:

- **New vehicle to the system (w/ ETAPS)**
    - Search ETAPS
    - Select new auto 
    - Select STAX from transaction type drop down box
    - Fill in any customer and auto information not already filled in
    - **Must enter in purchase price**
    - Sales tax will automatically be calculated
    - Submit transaction

- **New vehicle to the system**
    - Select new auto 
    - Select STAX from transaction type drop down box
    - Fill in the customer and the auto information
    - **Must enter in purchase price**
    - Sales tax will automatically be calculated
    - Submit transaction

- **Vehicle is already in the system**
    - Search for vehicle
    - Select vehicle that sales tax is owed for 
    - Select STAX from transaction type drop down box
    - Fill in any customer or auto information not already filled in
    - **Must enter in purchase price**
    - Sales tax will automatically be calculated
    - Submit transaction

MLI Only

Procedure:

- **Customer comes in to only pay MLI**
  - Search for and select suspended auto 
  - Select MLI_Only from transaction drop down box
  - Uncheck the MLI suspended checkbox
  - Recalculate if necessary
  - Submit transaction

- **Customer comes in to renew and after the auto is selected MLI suspended error comes up**
  - Select the auto tab
  - Uncheck the MLI suspended checkbox
  - If the MLI fee needs to be collected, enter in the override password
  - Select the checkbox next to fees
  - Type the amount in the **"Special"** fees box
  - Continue with renewal
  - Submit transaction

Title Only

Procedure:

- Search ETAPS
- Select new auto next to the corresponding customer 
- Select 'Title_Only' from the transaction drop down box
- Fill in any customer or auto information that is not filled
- Fee will automatically be calculated
- Submit transaction

Title Change

Procedure:

- Search for the auto that needs the title change
- On the 'Auto Tab' enter in the new ETAPS number
- The application will automatically verify that the current vin number matches the vin number attached to that ETAPS number
- The application will then automatically update the Title Name, Purchase Date, Purchase Type, and Acquired From
- STAX will automatically be charged, so the clerk must select 'No Sales Tax' if no sales tax is due
- Submit to the cart

Transfer

Procedure:

- Search for and select the auto that needs a tag transferred to it 
- Select "Transfer" from the transaction type drop down box
- Select the tag you want to transfer from the transfer drop down box
- Select 'Dispose' from the 'Action' drop down box
- Submit the transaction to the cart

Transfer with a Re-tag:

- Search for and select the auto that needs a tag transferred to it 
- Select 'Transfer' from the transaction type drop down box
- Select the tag you want to transfer from the transfer drop down box
- Select 'Re-Tag' from the 'Action' drop down box
- Submit the transaction
- The screen will be redirected back to the customer page, starting a 'Fees Only' transaction
- Select the 'Tag Category' and the 'Tag Type'
- Enter in the new tag number
- The fees will be automatically calculated
- Submit the transaction to the cart

Transfer New Registration

Procedure:

- Search by the ETAPS number, if not available search by the tag that needs to be transferred
- Find the customer that owns the tag that needs to be transferred
- Select the new auto next to the customer name 
- Select 'Transfer_NewReg' from transaction type drop down box
- Enter in any customer or auto information that is not automatically filled in
- Select the tag number to be transferred from the transfer drop down box
- If the tag is not in the drop down, enter the tag number in the text box to the right of the drop down
- This will populate the drop down, and the clerk should select that tag number from the drop down
- Check with ADOR to verify that newly purchased vehicle is current with all taxes
    - If not current, select 'Valid' from previous tag information drop down box
    - Enter in previous tag number
    - Enter in previous expiration date
    - When submitted, back taxes will be automatically calculated
- Select the credit tab
- Enter the date that old vehicle was sold in the eligible date text box
- Select 'Dispose' from the action drop down box
- Select 'Voucher', 'Receipt for Credit', or 'No Voucher'
- Submit when finished

Transfer New Registration with Re-Tag:

- Search by the ETAPS number, if not available search by the tag that needs to be transferred
- Find the customer that owns the tag that needs to be transferred
- Select the new auto next to the customer name 
- Select 'Transfer_NewReg' from transaction type drop down box
- Enter in any customer or auto information that is not automatically filled in
- Select the tag number to be transferred from the transfer drop down box
- If the tag is not in the drop down, enter the tag number in the text box to the right of the drop down
- This will populate the drop down, and the clerk should select that tag number from the drop down
- Enter the date that the old vehicle was sold in the eligible date text box
- Select 'Re-Tag' from the action drop down box
- Select 'No Voucher'
- Submit when finished
- The screen will be redirected back to the customer page, starting a 'Fees Only' transaction
- Select the 'Tag Category' and the 'Tag Type'
- Enter in the new tag number
- The Fees will be automatically calculated
- Submit the transaction to the cart

IRP_NewReg

Procedure:

- Search the ETAPS number or the customer's name and add a new vehicle. If the customer does not exist in system already the clerk should select the 'New Customer' 
- Once the clerk is on the customer tab change the transaction type to 'IRP_NewReg'
- After the customer and the auto information is input , the clerk should move to the 'Tag and Fees' tab
- 'Apportioned' should be selected for the 'Tag Category' and 'Tag Type'.
- Nothing will be in the tag number text box because the IRP# is assigned after the submit button is selected.
- After 'Apportioned' is selected the money will be calculated
- Submit the transaction to the cart

IRP_Renew

Procedure:

- Search for the automobile
- Then select the vehicle that needs to be renewed 
- When the customer screen appears change the transaction type to 'IRP_Renew'
- After the customer and the auto information is input , the clerk should move to the tag and fees tab
- 'Apportioned' should be selected for the 'Tag Category' and 'Tag Type'
- Nothing will be in the tag number text box because the IRP# is assigned after the submit button is selected
- After 'Apportioned' is selected the money will be calculated
- Select the submit button to go to the cart

Receipt for Credit

Procedure:

- Search for vehicle that is owed credit
- Select the vehicle that is owed credit 
- Enter in the date the vehicle was sold in the 'Eligible Date' text box
- The credit will be automatically calculated
- Submit the transaction to the cart

Business Rules

Vehicle Taxes

Since October 1, 1989, licensing officials throughout the state began collecting county and municipal sales and use (Ad Valorem) taxes on all vehicle purchases. Act 89-691, enacted during the 1989 Regular Session of the Alabama Legislature, provides for the collection of taxes both on vehicles sold by licensed dealers and on casual sales between individuals.

Sales taxes on casual sales (sales between individuals) are collected when the purchaser applies for license registration at the courthouse. Rates are based on the tax rates in effect for vehicles in the county and municipality in which the purchaser resides. State sales and use tax on vehicle purchases is 2% of the net purchase price.

Ad Valorem tax is calculated using the market value of the vehicle - defined and maintained by the state in the VinVal database. Sales tax is based solely on purchase price (listed on the bill of sale).

The state law requires licensed dealers to furnish all purchasers of new or used vehicles with an invoice or bill of sale which reports the separate amounts of state, county and municipal sales tax collected by the dealer at the time of purchase. The appropriate sales tax rates should be listed also.

All purchasers of vehicles are required to show their invoice or bill of sale when applying to the licensing official for vehicle registration. Registration is mandatory within twenty (20) calendar days of purchase date without tag penalty. If the licensed dealer has collected county and municipal sales taxes as reflected on the invoice, then no sales tax is due. However, if municipal or county taxes are not collected at the time of purchase, the buyer will be required to pay the sales tax applicable to vehicle sales which is in effect for the municipality or county in which the purchaser abides.

A county resident will always pay applicable state and county sales or use taxes on vehicle purchases. If the county resident buys a vehicle from a dealer in the city, then he may pay city sales tax to the dealer. A city resident will always pay applicable state, county and city sales or use taxes on vehicle purchases. If the city resident buys a vehicle from a dealer in a neighboring city and the dealer fails to collect city sales tax, then the city resident will pay city sales tax at the time of vehicle registration.

Registration Dates

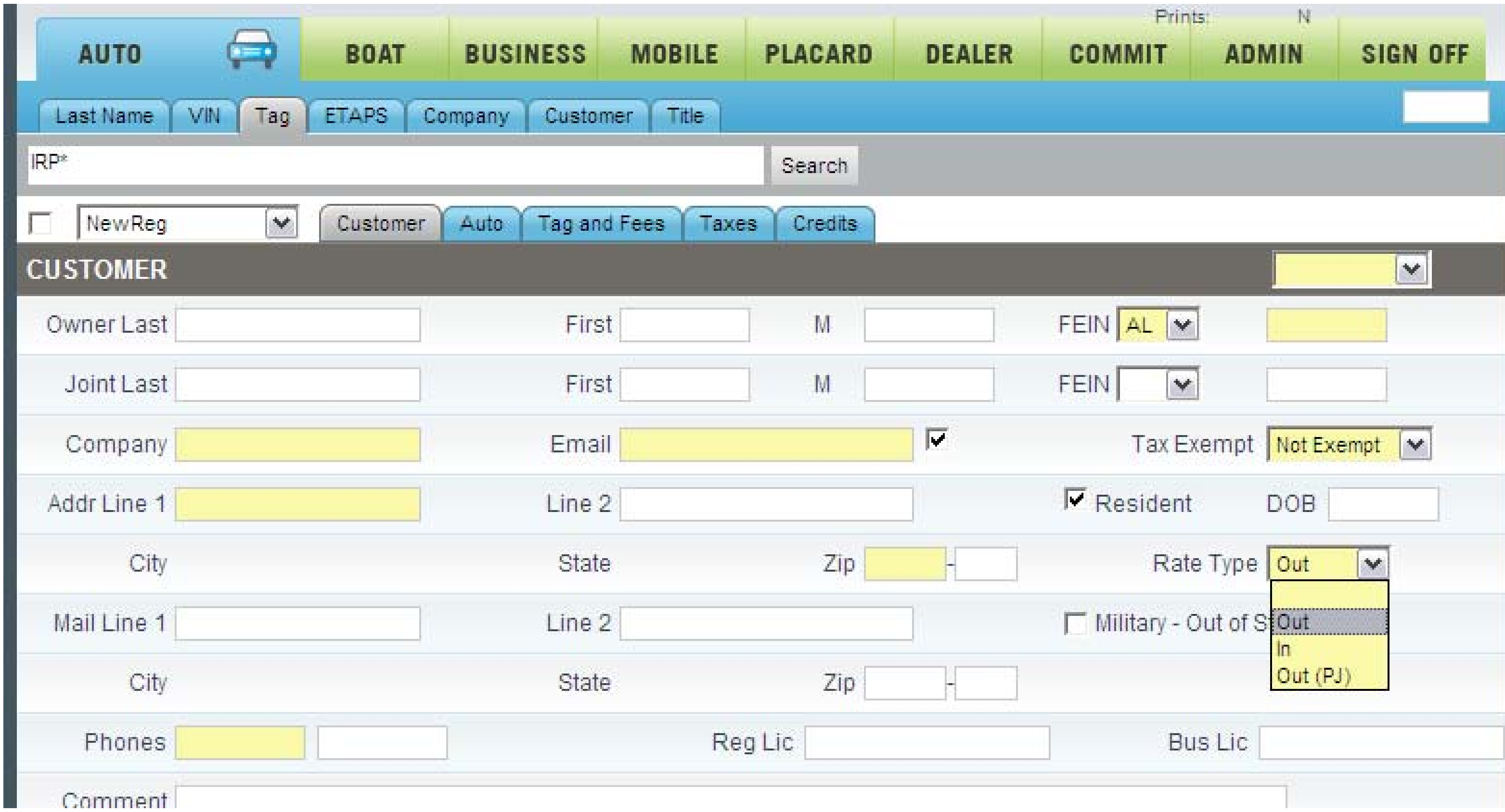
Alabama registers vehicles under a staggered registration system, January through November, based on the first letter of the owner's last name. Motor vehicle registrations expire on the last day of the designated renewal month. For example, someone whose last name begins with the letter F, G, or N is required to register his/her vehicle in the month of April, and the previous registration expires on April 30. Leased, commercial and fleet vehicles are subject to renewal in the months of October and November and the registrations for these type of vehicles expire on November 30.

Rate Type

The rate type field is located under the customer tab (see screen shot below) and is used for tax calculations.
Select:

- **Out - if the customer lives outside city limits**
- **In - if the customer lives inside city limits**
- **Out (PJ) - if the customer lives outside the city limits, but inside the city's police jurisdiction**

It is up to the customer to declare where they live. However, the clerk must advise the customer that the information provided will be checked and the customer will be subject to pay tax and penalties if incorrect information is provided.



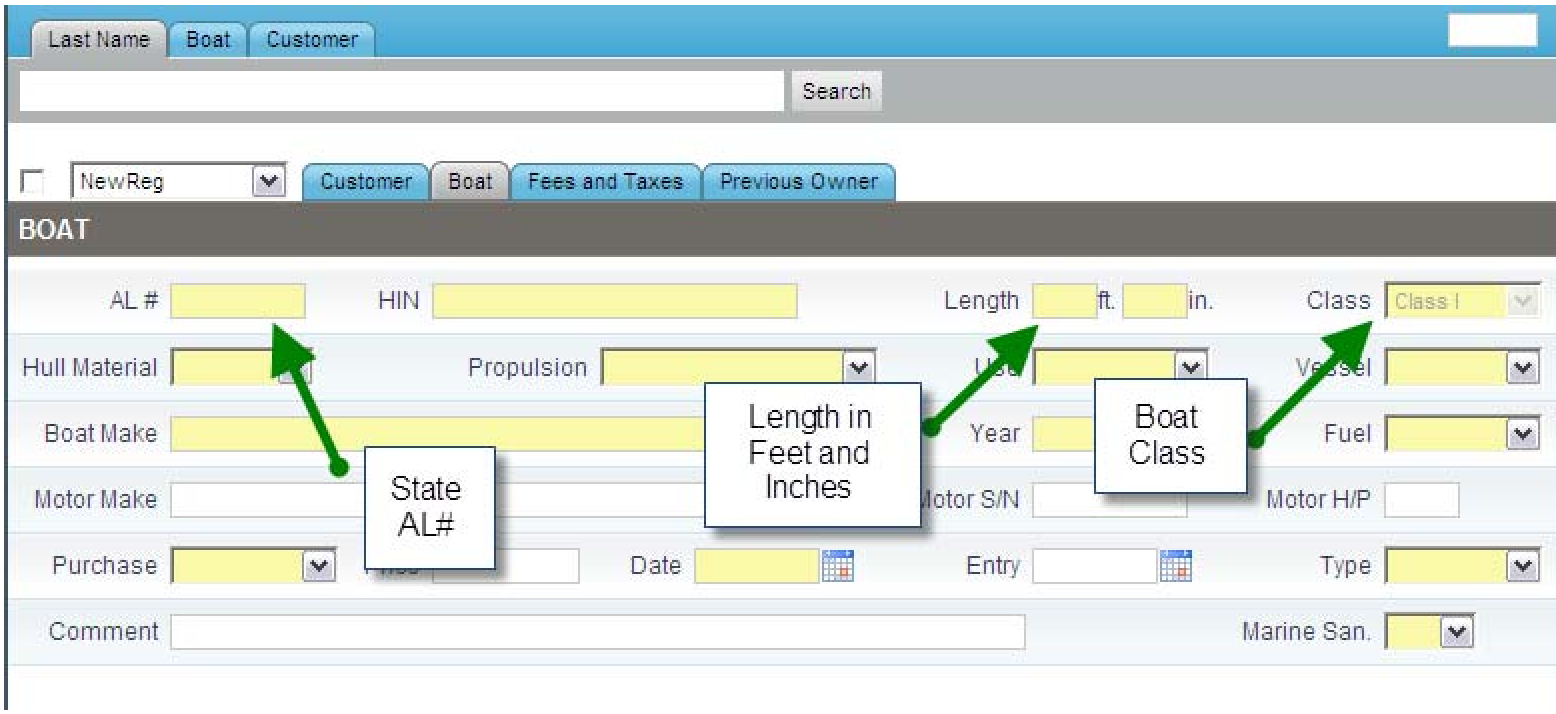
Boats

Special Fields

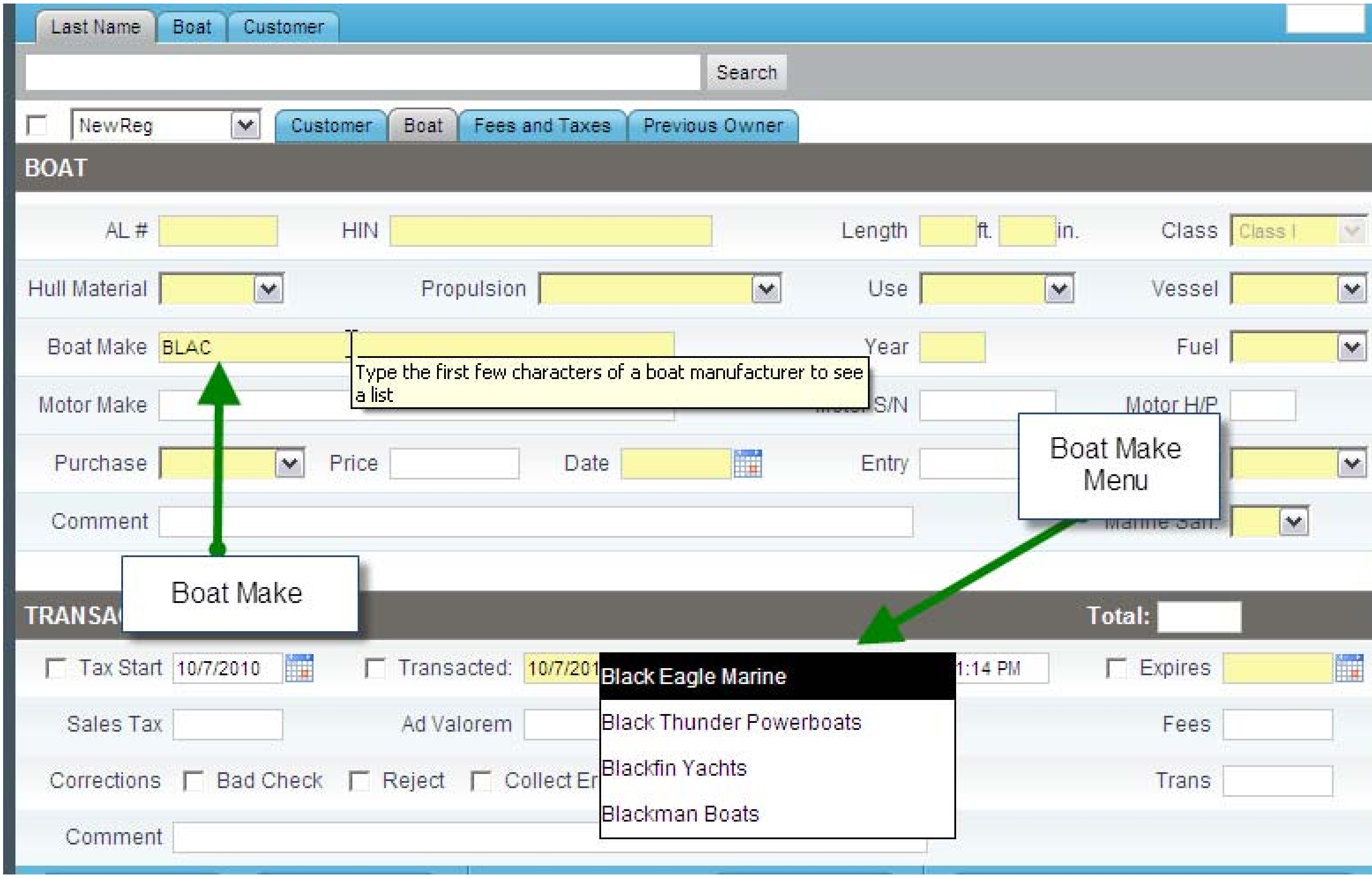
Boat Tab

The 'Boat' tab and its fields are unique to the 'Boat' business module.

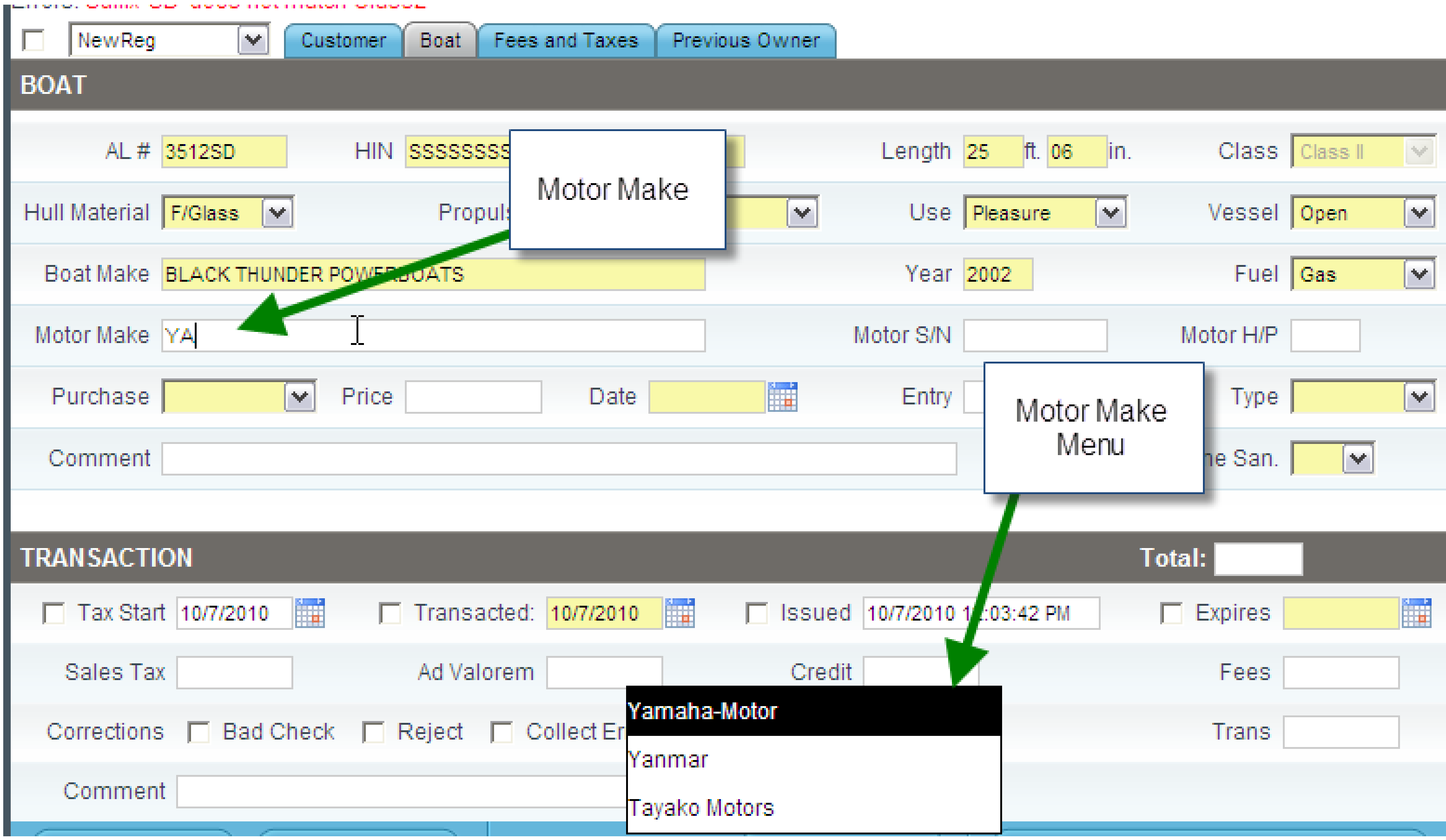
The 'AL#' textbox contains the boats state issued unique number. The 'HIN' is the hull identification number assigned by the boat manufacture and is unique to each individual boat. The 'Length' textboxes sets the boat 'Class' which dictates the registration fee.



The 'Boat Make' textbox will bring up a dropdown menu containing the boat makes that match what you have typed.



The 'Motor Make' textbox will bring up a dropdown menu containing the motor makes that match what you have typed.



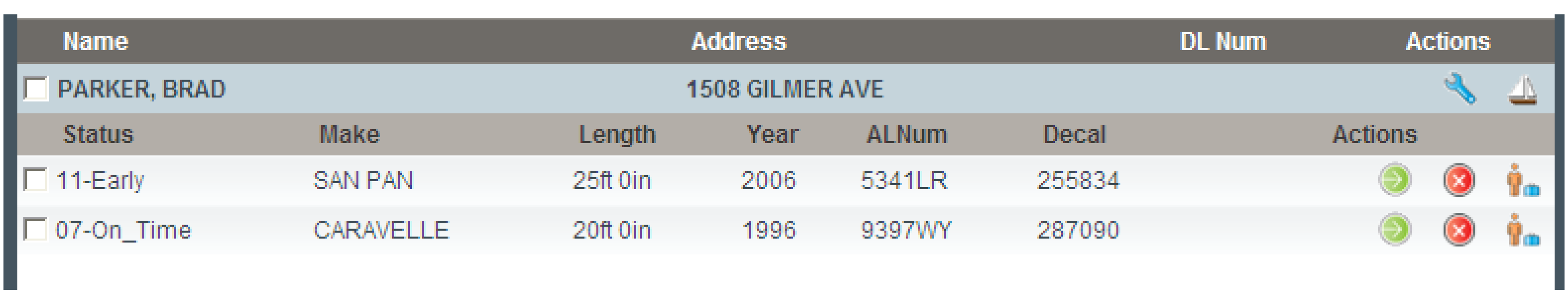
Boat Status

All boats in the system have a status which is displayed in the search page.

Boat status is shown in the form "yy-status" where:

- "yy" represents the registration year and
- "status" is one of the following:
  - Early - registration is valid and the current decal is within the current registration period
  - On_Time - customer has been notified, registration must be renewed prior to month end

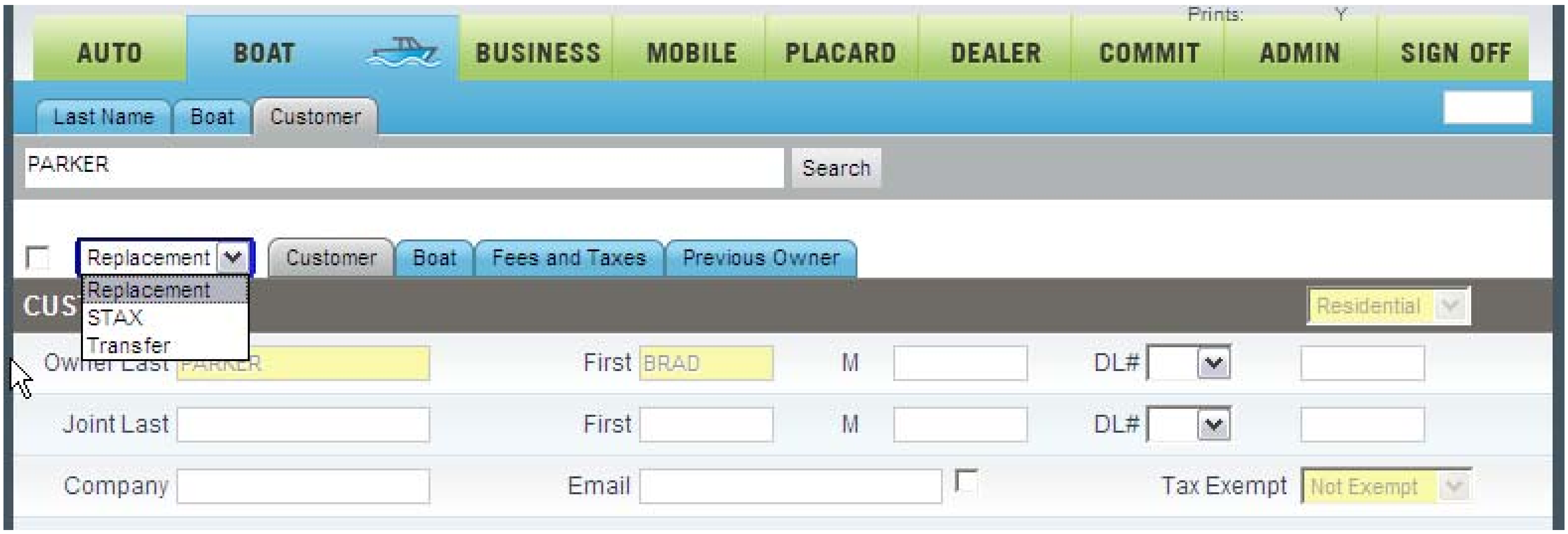
The following screen shot shows 2 boats registered to Brad Parker. One is "Early" and one is "On_Time":



Clicking on the "Select Boat" icon  will move you to the customer tab where you can select the transaction you want to execute for the boat. The type of transaction allowed for a boat will depend on the boat's status according to the following table:

Status:	Early	On_Time
Transactions:	Replacement STAX Transfer	Renew Transfer Transfer Renew STAX

Use the drop down list to the left of the customer tab to select the transaction. For example, if the boat's status is "Early", the available transactions can be shown by clicking on the down arrow in the drop down list:



Boat Transactions

New Registration

Procedure:

- **Customer not in system**
    - Enter in the customer information
    - Enter in the boat information
    - Enter in the new decal number
    - Do not enter in the control number, the system will automatically assign the numbers
    - Fees and expiration date will automatically be calculated and assigned
    - Submit transaction

- **Customer is already in system**
    - Search customer for transaction
    - Select new boat next to the customers name 
    - Enter in the any customer info that is not automatically filled
    - Enter in the boat information

- Enter in the new decal number
- Do not enter in the control number, the system will automatically assign the numbers
- Fees and expiration date will automatically be calculated and assigned
- Submit transaction

Renew

Procedure:

- **Basic Renewal**
    - Search for a specific AL number or last name
    - Select the boat that needs to be renewed 
    - Enter in any customer and boat information that is not automatically filled
    - Select the Fees and Taxes tab
    - Enter in the decal number
    - Do not enter anything in the control number text box
    - Fees will automatically be calculated
    - Submit transaction

Replacement

Procedure:

- Search for the specific AL number
- Verify that the status is early
- Select the boat that needs to receive a new decal 
- Enter in the new decal number
- The control number will automatically be added
- Submit transaction

STAX

Procedure:

- **New boat to the system**
    - Select the customer
    - Select STAX from transaction type drop down box
    - Fill in the customer and boat information
    - Enter in the purchase price
    - Sales tax will automatically be calculated
    - Submit transaction

- **Boat is already in the system**
    - Search for boat
    - Select boat that sales tax is owed for 
    - Fill in any customer or boat information not already filled in

- Enter in the purchase price
- Sales tax will automatically be calculated
- Submit transaction

Transfer

Procedure:

- **The boat that was purchased is already in the system, but the customer is not**
    - Select transfer from the transaction type drop down box
    - Enter in the customer information
    - In the boat tab enter the AL number in the Trans AL number text box
    - The boat information will automatically be filled in
    - The decal and previous owner information will automatically be entered
    - Do not enter anything in the control number text box
    - Fees will automatically be calculated
    - Submit transaction

- **The boat that was purchased is in already in the system, an the customer is also**
    - Search for the customer by last name
    - Select the new boat 
    - Select transfer from the transaction type drop down box
    - The customer information will already be entered
    - In the boat tab enter the AL number in the Trans AL number text box
    - The boat information will automatically be filled in
    - The decal and previous owner information will automatically be entered
    - Do not enter anything in the control number text box
    - Fees will automatically be calculated
    - Submit transaction

- **The boat and customer are not in the system**
    - Select transfer from the transaction type drop down box
    - Enter in the customer information
    - Enter in the boat information
    - Enter in the decal number
    - Do not enter anything in the control number text box
    - Previous owner information is not required
    - Fees will automatically be calculated
    - Submit transaction

- **Customer is in the system, but the purchased boat is not**
    - Search for the customer by last name
    - Select the new boat 
    - Select transfer from the transaction type drop down box
    - Customer information will already be entered
    - In the boat tab enter in all boat information
    - Enter in the previous decal number
    - Do not enter anything in the control number text box
    - Previous owner information will not be required

- Fees will automatically be calculated
- Submit transaction

Transfer Renew

Procedure:

- **The boat that was purchased is already in the system, but the customer is not**
  - Select transfer_renew from the transaction type drop down box
  - Enter in the customer information
  - In the boat tab enter the AL number in the Trans AL number text box
  - The boat information will automatically filled in
  - Previous owner information will automatically be entered
  - Enter in the decal number
  - Do not enter anything in the control number text box
  - Fees will automatically be calculated
  - Submit transaction

- **The boat that was purchased is already in the system, and the customer is also**
  - Search for the customer by last name
  - Select the new boat 
  - Select transfer_renew from the transaction type drop down box
  - Customer information will already be entered
  - In the boat tab enter the AL number in the Trans AL number text box
  - The boat information will automatically filled in
  - Previous owner information will automatically be entered
  - Enter in the decal number
  - Do not enter anything in the control number text box
  - Fees will automatically be calculated
  - Submit transaction

- **The boat and customer are not in the system**
  - Select transfer_renew from the transaction type drop down box
  - Enter in the customer information
  - Enter in the boat information
  - Enter in the decal number
  - Do not enter anything in the control number text box
  - Previous owner information is not required
  - Fees will automatically be calculated
  - Submit transaction

- **Customer is in the system, but the purchased boat is not**
  - Search for the customer by last name
  - Select the new boat 
  - Select transfer_renewal from the transaction type drop down box
  - Customer information will already be entered
  - In the boat tab enter in all boat information
  - Enter in the previous decal number
  - Do not enter anything in the control number text box

- Previous owner information will not be required
- Fees will automatically be calculated
- Submit transaction

Registration Rules

Rules for registering boats in Alabama can be found at the following official website provided by the Alabama Department of Conversation and Natural Resources:

http://www.dcnr.alabama.gov/boating/registration/

The Alabama Legislature amended Act 89-691 to include county and municipal sales and use tax on boat purchases effective on and after July 1, 1994. Sales and use tax must be paid prior to boat registration. All taxes collected by licensing officials are remitted directly to the appropriate municipal or county government.

Placard

Special Fields

Placard Tab

The 'Placard' tab and its fields are unique to the 'Placard' business module.

The 'Months' drop down box choices determine the length of time the customer will have a valid handicap placard. The placard number should be entered into the 'Placard Number' textbox.

Placard Transactions

New Registration

Procedure:

- **Customer that is not in the system**
  - Enter required customer information
  - Select the number of months that the placard will be valid
  - Enter the placard number
  - Expiration date will be automatically assigned
  - Submit transaction

- **Customer is in system**
  - Search for the customer
  - Select the placard icon next to the correct customer
  - Enter any customer information that is not already filled
  - Select the number of months that the placard will be valid
  - Enter the placard number
  - Expiration date will be automatically assigned
  - Submit transaction

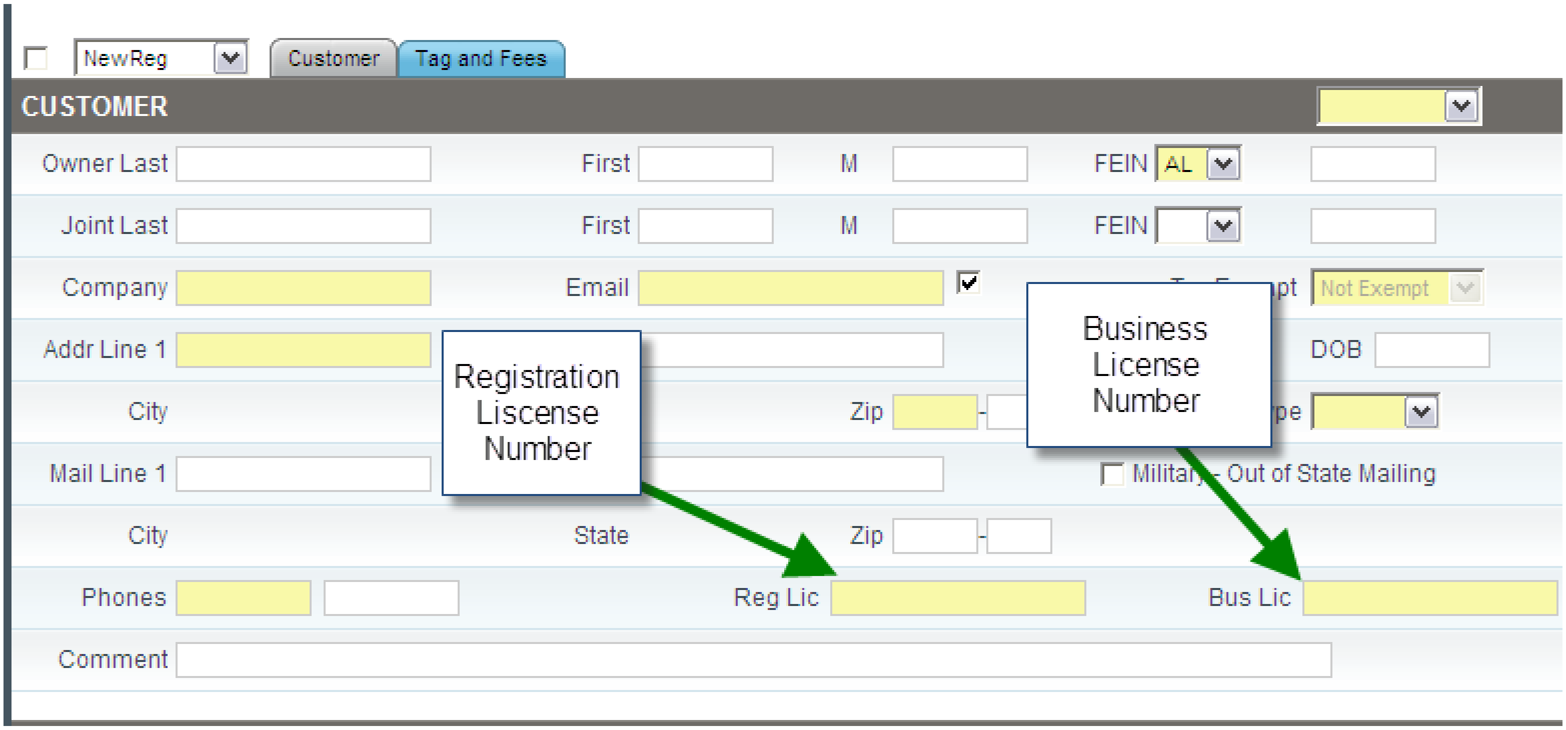
Dealer

Special Fields

Reg Lic & Bus Lic

When the 'Dealer' biz type is selected the registration license number and the business license number will become required fields.

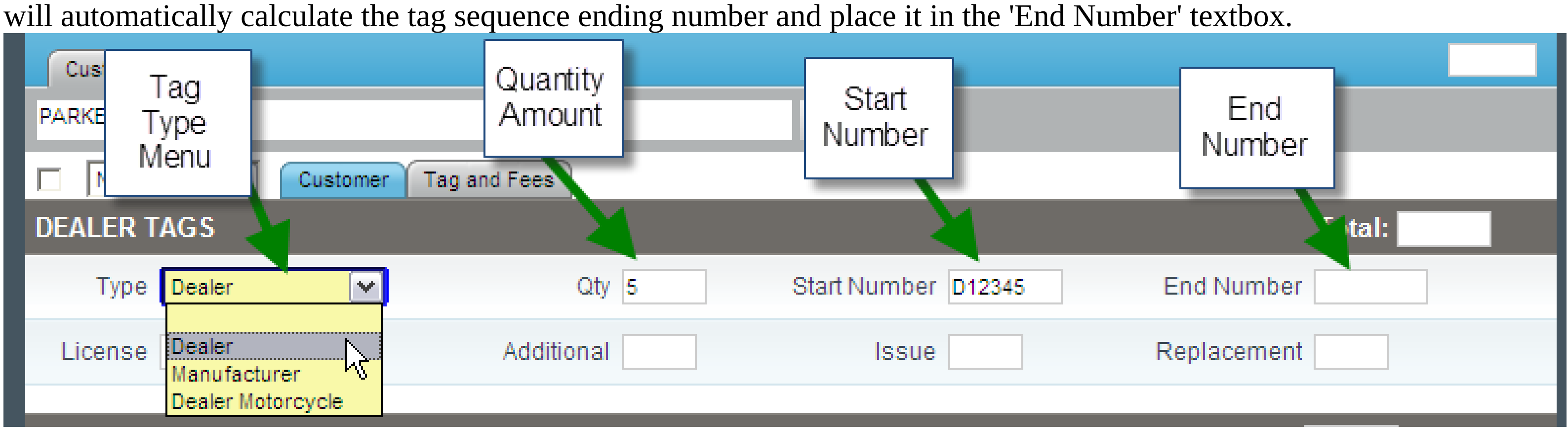
These two numbers should match one another.



Tag and Fees

The 'Tag and Fees' tab and its fields are unique to the 'Dealer' business module.

The 'Tag Type' drop down box contains the three different dealer tag types. The clerk should enter the number of tags the customer wants in the 'Quantity' textbox and the tag starting number in the 'Start Number' textbox. The application will automatically calculate the tag sequence ending number and place it in the 'End Number' textbox.



Dealer Transactions

New Registration

Procedure:

- **Company is already in the system**
  - Search the company name
  - Select dealer tag next to the customers name 
  - Enter any customer information that is not filled in
  - Select dealer tag type from drop down box
  - Enter a tag number that corresponds with the correct format
  - Enter in the amount of tags they want to order
  - Enter in the start number
  - The end number will automatically be calculated
  - Fees will automatically be calculated
  - Submit transaction

- **Company is not in the system**
  - Enter in customer information
  - Select dealer tag type from drop down box
  - Enter a tag number that corresponds with the correct format
  - Enter in the amount of tags they want to order
  - Enter in the start number
  - The end number will automatically be calculated
  - Fees will automatically be calculated
  - Submit transaction

Replacement

Procedure:

- **Company is already in the system**
  - Search the company name
  - Select dealer tag next to the customers name 
  - Enter any customer information that is not filled in
  - Select "Replacement" from the drop down box
  - Enter the tag number that corresponds with the correct format
  - Fees will automatically be calculated
  - Submit transaction

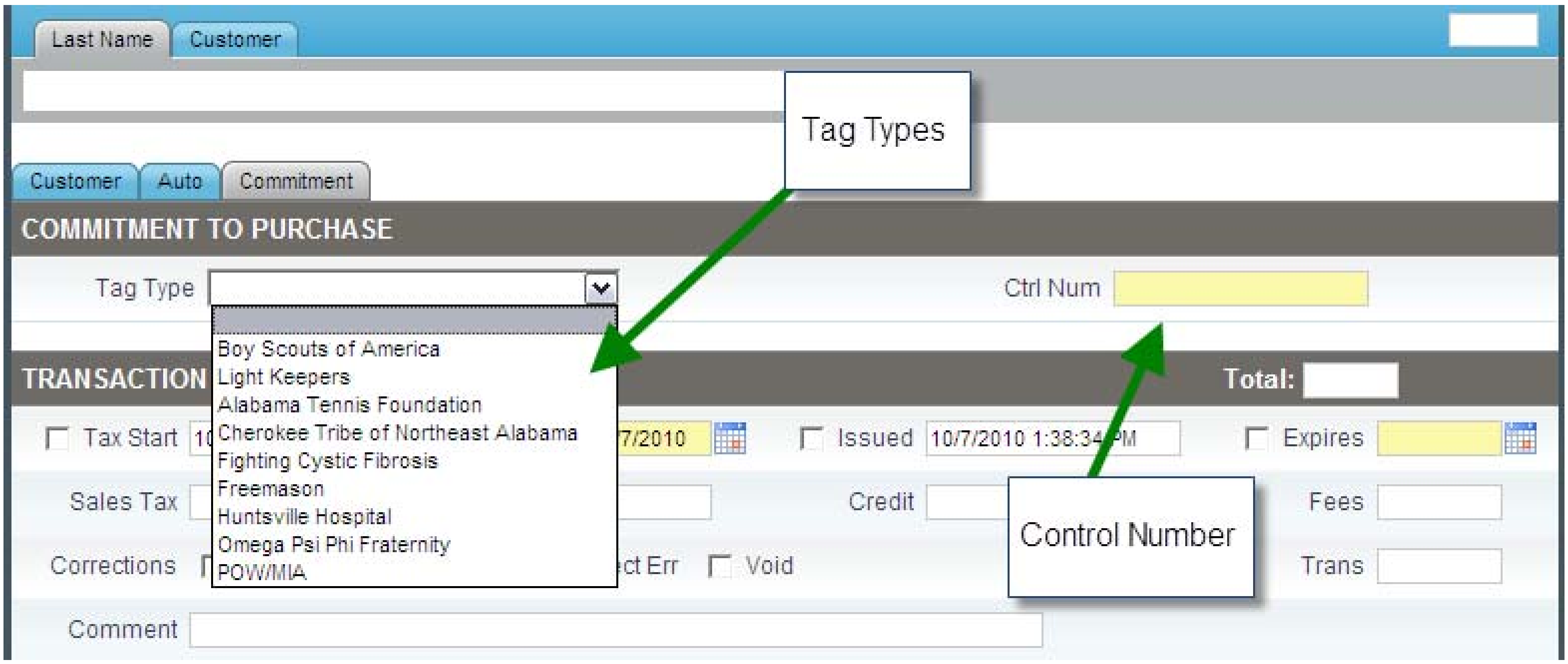
Commit to Purchase

Special Fields

Commitment Tab

The 'Commitment' tab and its fields are unique to the 'Commitment' business module.

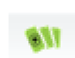
Under the commitment tab, there is a 'Tag Type' drop down box. Within this box there are tags that are available to be pre-ordered by customers. The 'Control Number' textbox holds the control number from the customer's application.



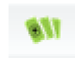
Commitment Transaction

New Registration

Procedure:

- **From the commitment to purchase business type with a customer in the system**
  - Search for the specific customer
  - Select the commit button next to the customer's name 
  - Enter in any customer information that is not automatically filled
  - Enter in the auto information
  - Select tag from the tag type drop down box
  - Enter in the control number
  - Fees will automatically be calculated
  - Submit transaction

- **From the commitment to purchase business type and the customer is not in the system**
    - Enter in the customer information
    - Enter in the auto information
    - Select the tag from the tag type drop down box
    - Enter in the control number
    - Fees will automatically be calculated
    - Submit transaction

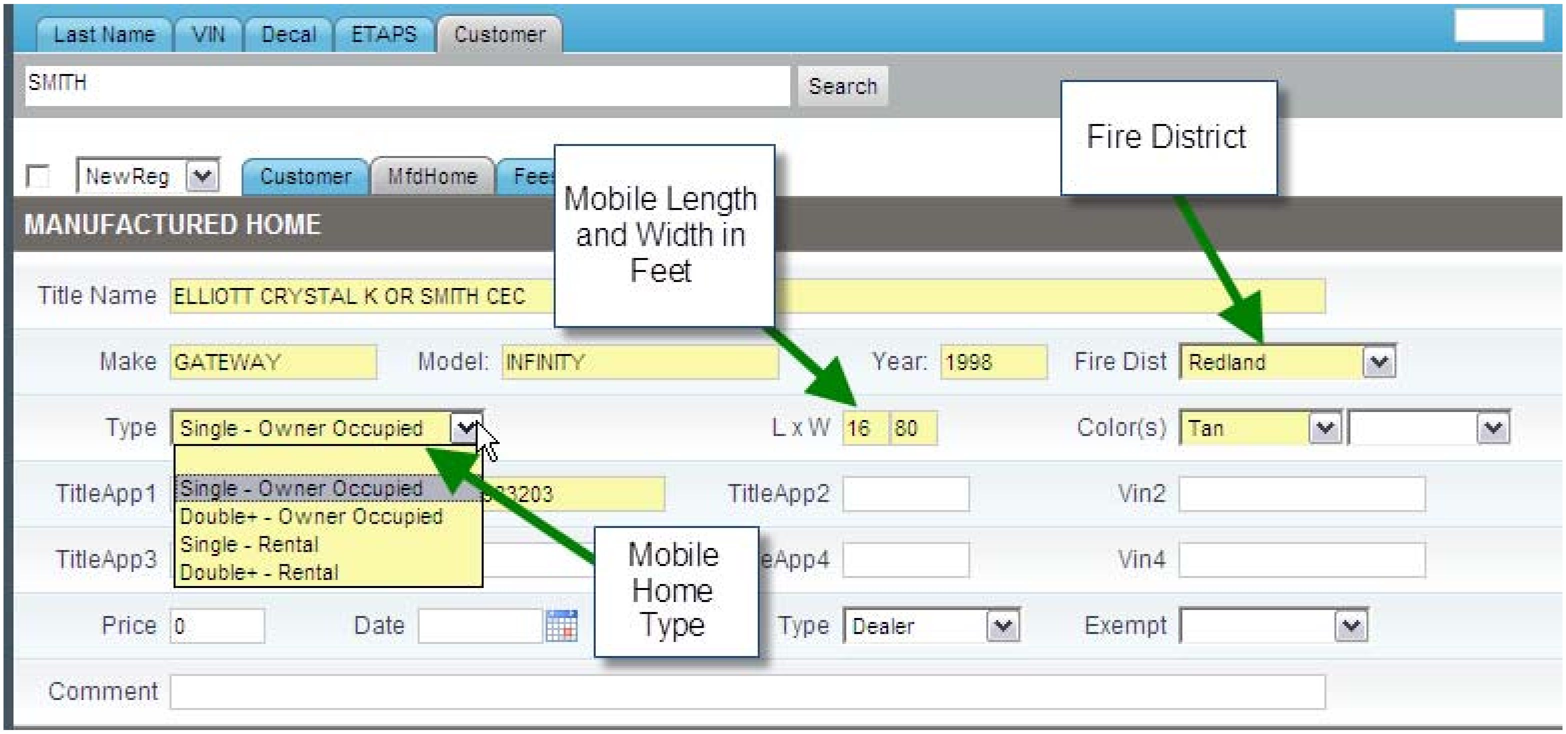
- **Commit to purchase from the auto business type**
    - Search specific auto for commitment to purchase
    - Select the commit button next to the customer's name 
    - Enter in any customer information that is not automatically filled
    - Enter in any auto information that is not automatically filled
    - Select the tag from the tag type drop down box
    - Enter in the control number
    - Fees will automatically be calculated
    - Submit transaction

Mobile Homes

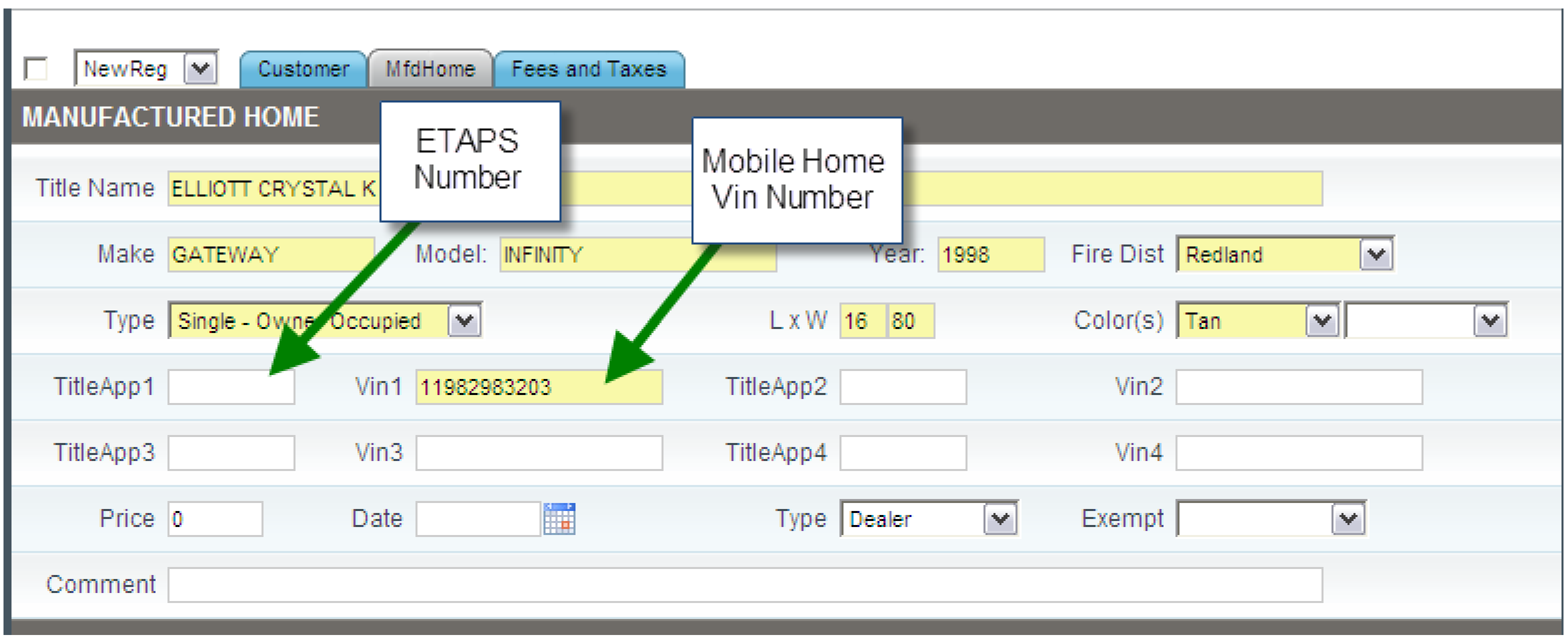
Special Fields

MfdHome Tab
The 'MfdHome' tab and its fields are unique to the 'Mobile' business module.

The 'MfdHome' tab contains a 'Fire District' drop down menu, a 'Manufactured Home Type' drop down menu, and a textbox for the 'Length and Width'. These are all required fields on this tab.



Every manufactured home has at least one VIN number. Every ETAPS number should be listed in the 'TitleApp' textbox and the corresponding VIN number should go into the 'Vin' textbox.

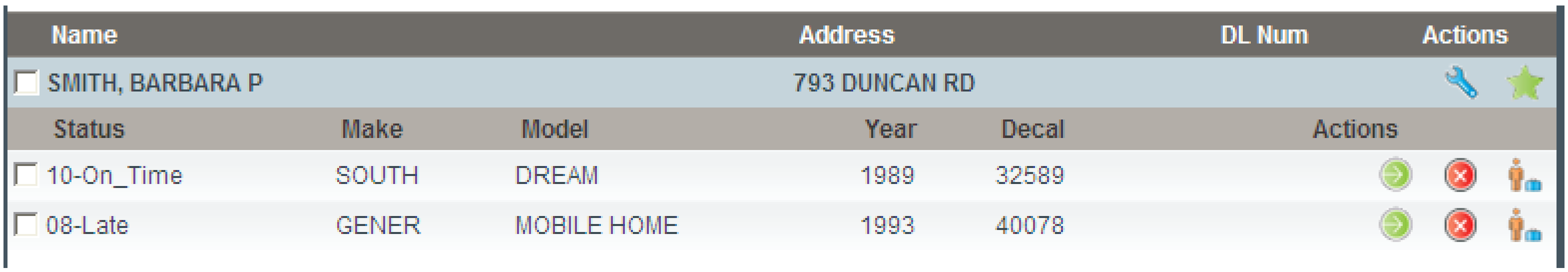


Mobile Home Status

All manufactured homes in the system have a status which is displayed in the search page.
Manufactured homes status is shown in the form "yy-status" where:

- **"yy" represents the registration year and**
- **"status" is one of the following:**
    - Early - registration is valid and the current decal is within the current registration period
    - On_Time - customer has been notified, registration must be renewed prior to month end
    - Late - renewal date has passed, customer will be assessed a late fee

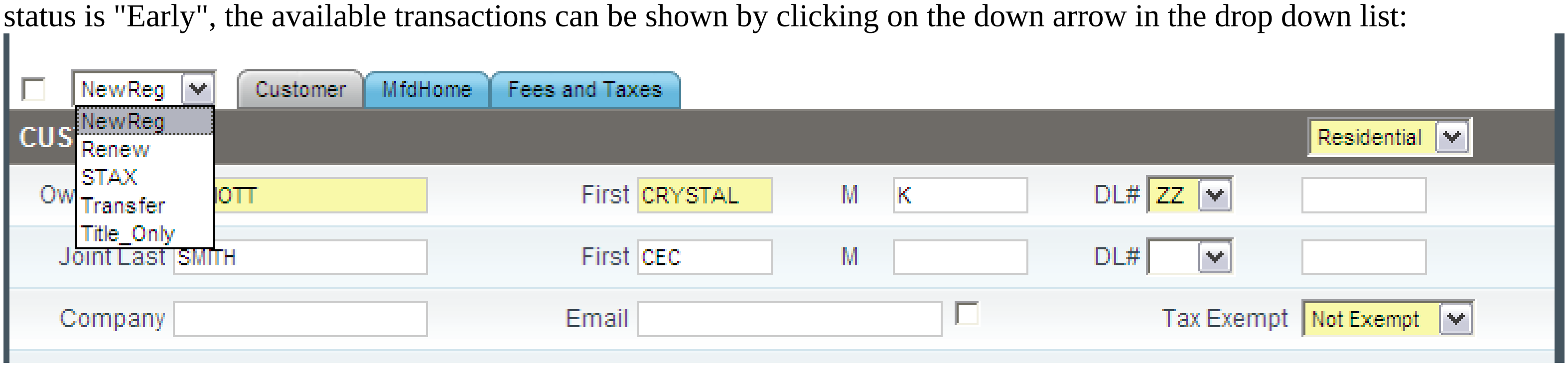
The following screen shot shows 2 manufactured homes registered to Barbara Smith. One is "Late" and one is "On_Time":



Clicking on the "Select Manufactured Home" icon  will move you to the customer tab where you can select the transaction you want to execute for the manufactured home. The type of transaction allowed for a manufactured home will depend on the manufactured home's status according to the following table:

Status:	Early	On_Time	Late
Transactions:	Renew Transfer STAX Title Only	Renew Transfer STAX	Renew STAX Transfer

Use the drop down list to the left of the customer tab to select the transaction. For example, if the manufactured home's status is "Early", the available transactions can be shown by clicking on the down arrow in the drop down list:



Mobile Home Transactions

New Registration

Procedure:
- Search the ETAPS number
- Select the Customer if they are in the system
- Fill in any customer or manufactured home information that was not automatically filled in
- The fees and taxes will be automatically calculated
- Submit the transaction to the cart

Renew

Procedure:
- Search for the customer in the application
- Select the manufactured home that needs to be renewed
- Fill in any customer or manufactured home information that was not automatically filled in
- The fees and taxes will be automatically calculated
- Submit the transaction to the cart

STAX

Procedure:
- Search the ETAPS number or search for the customer
- Select the manufactured home
- Fill in any customer or manufactured home information including the "Purchase Price" and "Purchase Date"
- The sales tax will automatically be calculated
- Submit the transaction to the cart

Transfer

Procedure:
- Search the ETAPS number
- Select the customer to transfer the manufactured home to
- Fill in any customer information that is not automatically filled
- Enter in the "Trans Decal Yr." and the "Trans Decal#"
- The manufactured home information will be automatically updated
- Submit the transaction to the cart

Title Only

Procedure:

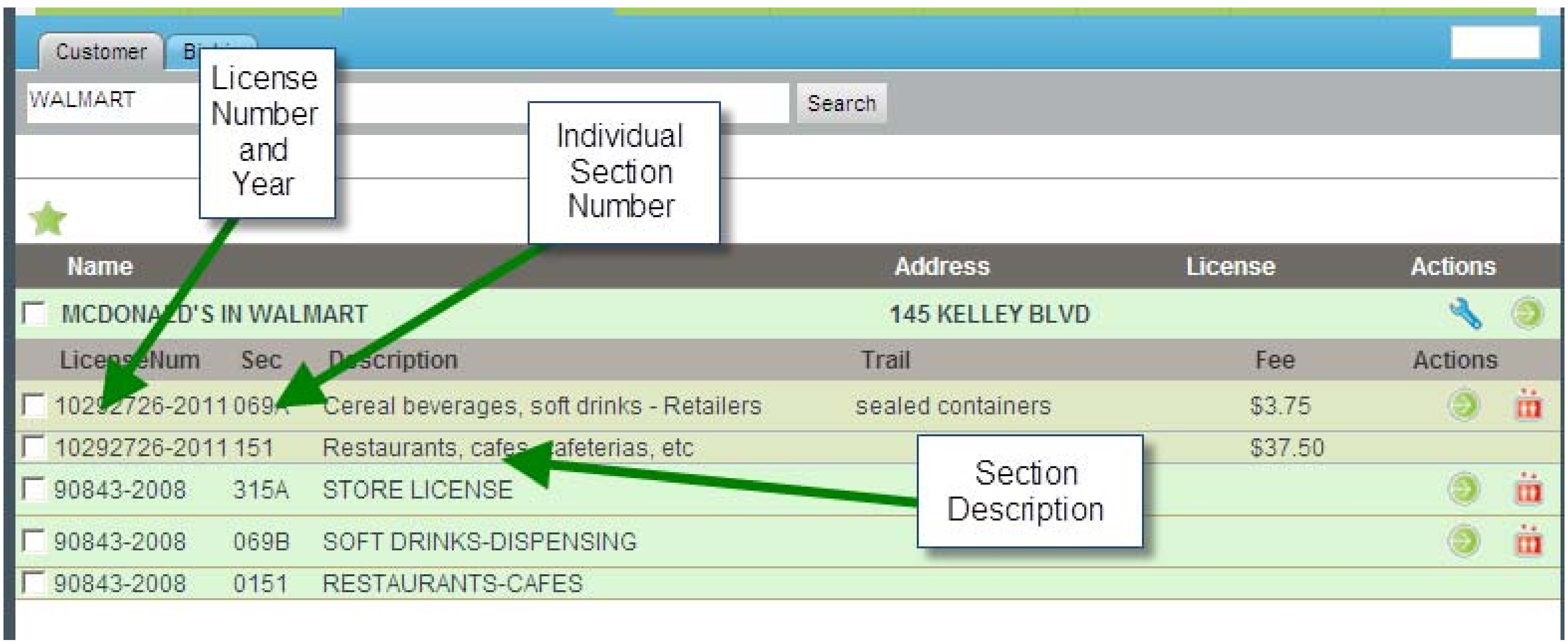
- Search the ETAPS number
- Select the customer for the "Title Only" transaction
- Fill in any customer or manufactured home information that is not automatically filled
- On the "Fees and Taxes" tab select the amount of titles the customer needs to buy
- The title fees will be automatically calculated
- Submit the transaction to the cart

Business License

Special Fields

Search Screen

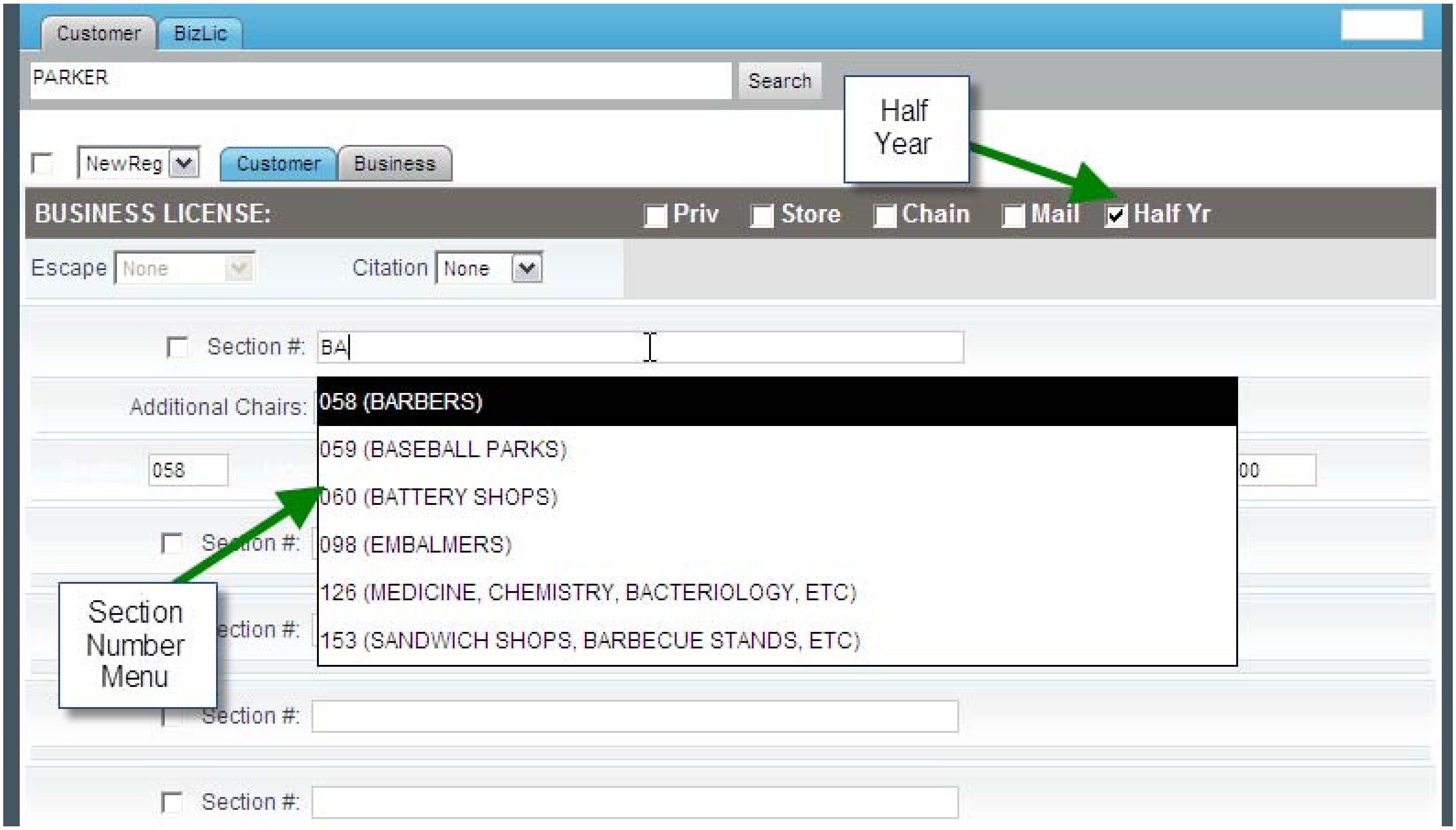
The business license search screen has is own unique fields. The license number and the year it was renewed are listed under the customer that renewed it. The section numbers, the section description, and the individual section prices are listed to right of the corresponding license number.



Business Tab

The 'Business' tab and its fields are unique to the 'Business' business module.

On the 'Business' tab the user can type the section number or begin to type the description and a menu of the section corresponding sections will drop down. Once the clerk selects the correct item number the application will calculate the fees or more menus will drop down.



Business License Transactions

New Registration

Procedure:

- Search for the customer
- If customer already exist select new business license 
- If customer does not exist select new customer (green star) 
- Fill in any customer information that needs to be filled
- Type the section number or type in a description of the section and a drop down menu will appear
- Select the section number
- The Fees automatically calculate
- Submit the transaction to the cart

Renew

Procedure:

- Search for the customer's business license
- Select the business license you want to renew 
- Fill in any customer information that needs to be filled
- Type the section number or type in a description of the section if needed and a drop down menu will appear

- Select the section number
- The fees will automatically calculate
- Submit the transaction to the cart

Escape

Procedure:
- Search for the customer's business license
- Select the business license you want to renew 
- Fill in any customer information that needs to be filled
- Select the "Escape" year from the drop down box
- Type the section number or type in a description of the section if needed and a drop down menu will appear
- Select the section number
- The fees will automatically calculate
- Submit the transaction to the cart

Transfer

Procedure:
- Search for the business license you would like to transfer
- Select the transfer business license button 
- Search for the customer who is receiving the business license
- Select the "Transfer to this Customer" button 
- The transaction will automatically submit to the cart

Customer Organization

Group Move

The "Group Move" function is found on the search page.

The "Group Move" function allows vehicles to be consolidated under one customer. Since the Tag App is a new system, the information in the system is organized by customer and then by vehicle. Because of the way information was organized in the previous system, the new system may list the same customer several times. This is because the information about the customer may be slightly different (for example, misspelled addresses). The "Group Move" is used when the customer already exist in the system.

Procedure:
- Search the customer that needs to be moved
- The "Group Move" function is selected by clicking on the checkbox next to the automobile(s) or boats(s) that need to be moved
- Then click on the icon for group move

- On the search page check the checkbox next to the customer under which you want to combine the vehicles
- If the customer does appear, search the customer that you would like to move to
- Select the green plus sign next to that customer
- This will combine the two customers

Create New Group

The "Create New Group" function is found next to the auto or boat on the search page.

The "Create New Group" function allows vehicles that are grouped with the wrong customer to be grouped under the right customer. Since the Tag App is a new system, the information in the system is organized by customer and then by vehicle. Because of the way information was organized in the previous system, the new system may list the same customer under the wrong customer. The "Create New Group" is used when the customer does not already exist in the system.

Procedure:
- Search the vehicle or boat that needs to be moved
- The "Create New Group" function is selected by clicking on the icon next to automobile or boats that needs to be moved
- The customer page will appear and the clerk should then enter all the customer information
- Finally, the clerk should hit submit and the automobile or boat will be grouped under the new customer

Cart Page

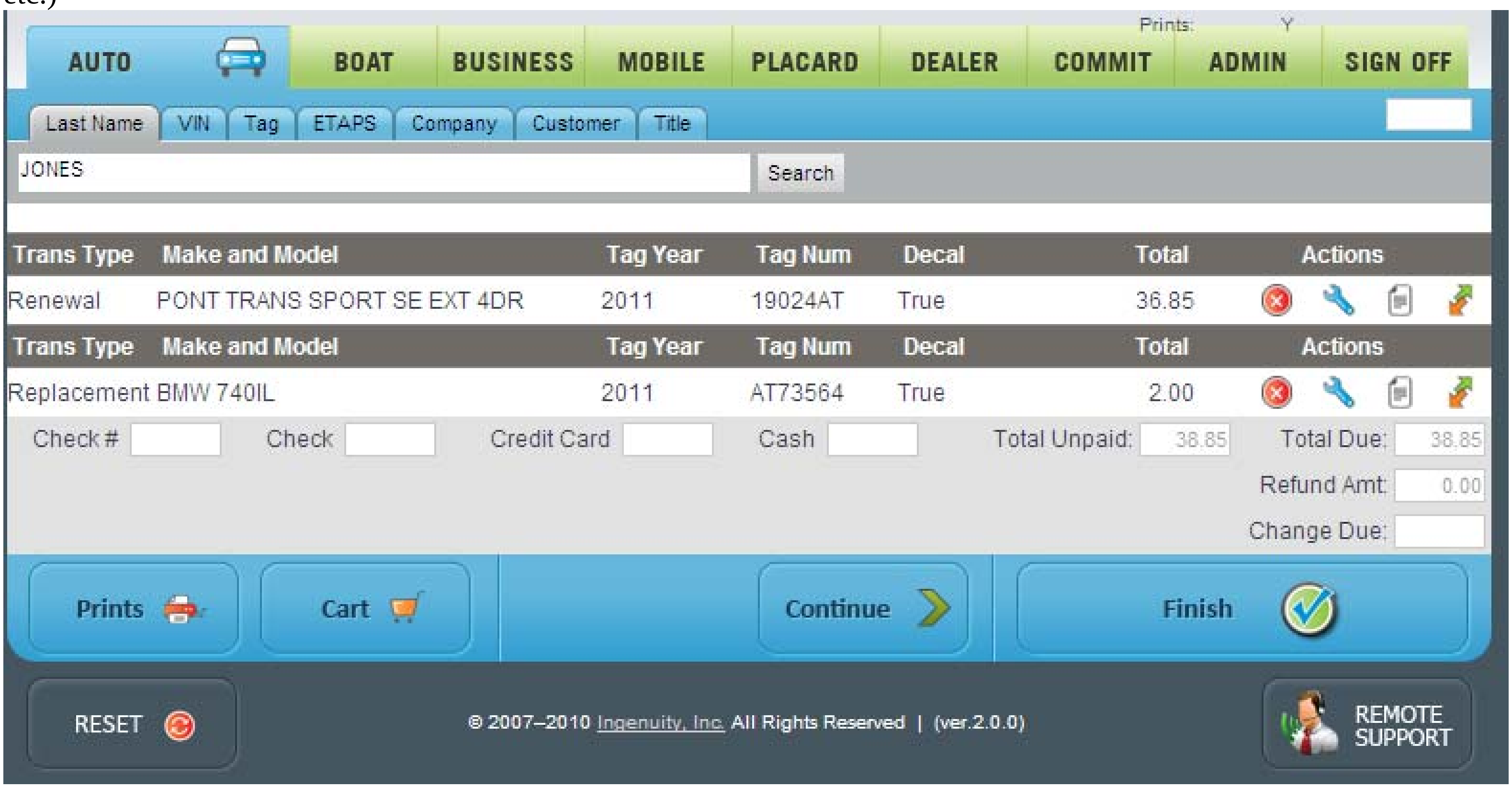
The cart page shows a summary of all transactions for the current customer.

When all of the transactions for a customer are complete, payment type and amount of payment is entered on this page.

The following screen shot shows two transactions - one a renewal and the other a replacement. The amount due and the finish button, will be grayed out until an amount is entered into one of the payment type fields. The amount in the change due field will be automatically calculated by the system.

While on the cart page, a transaction can be deleted, edited, or a receipt can be viewed. The toggle decal button will allow the user to reverse the decal status as needed.

The continue button sends you to the search results page of the application component that you are in (e.g. auto, boat, etc.)



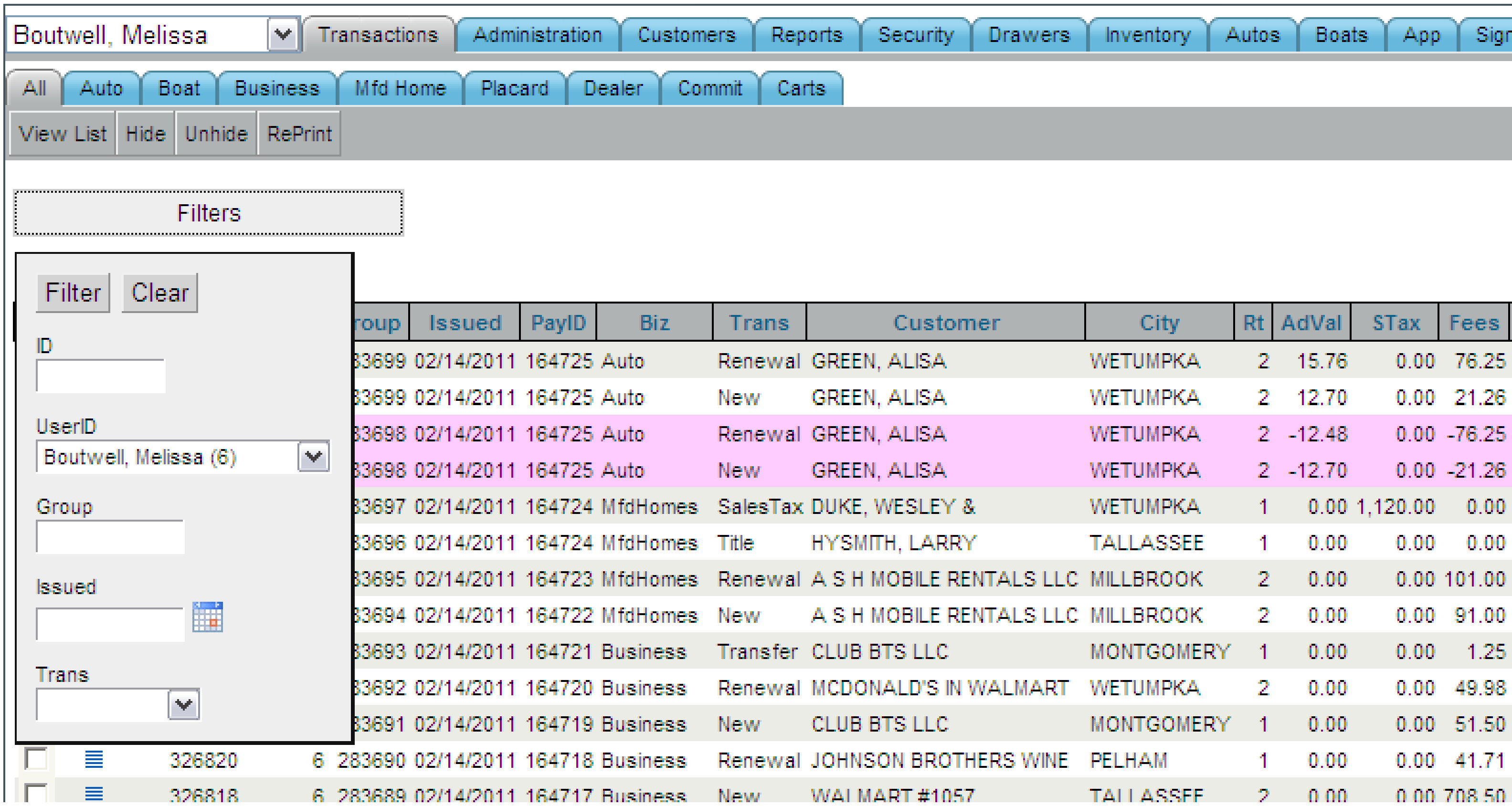
Admin Function

Transactions Tabs

All Tab

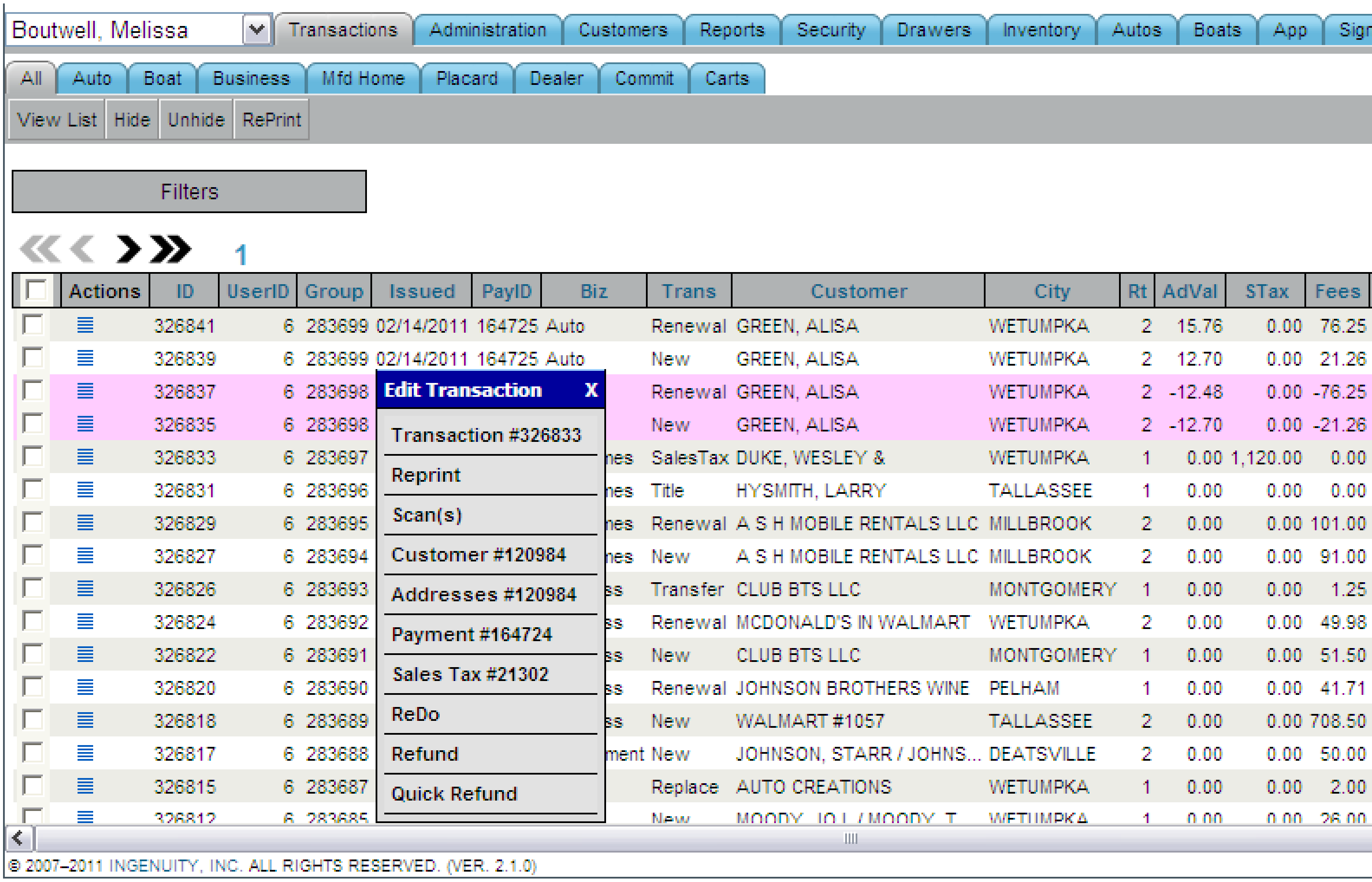
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk should enter in their search parameters. The search parameters will change depending on the 'Biz' type selected.



Transaction Menu

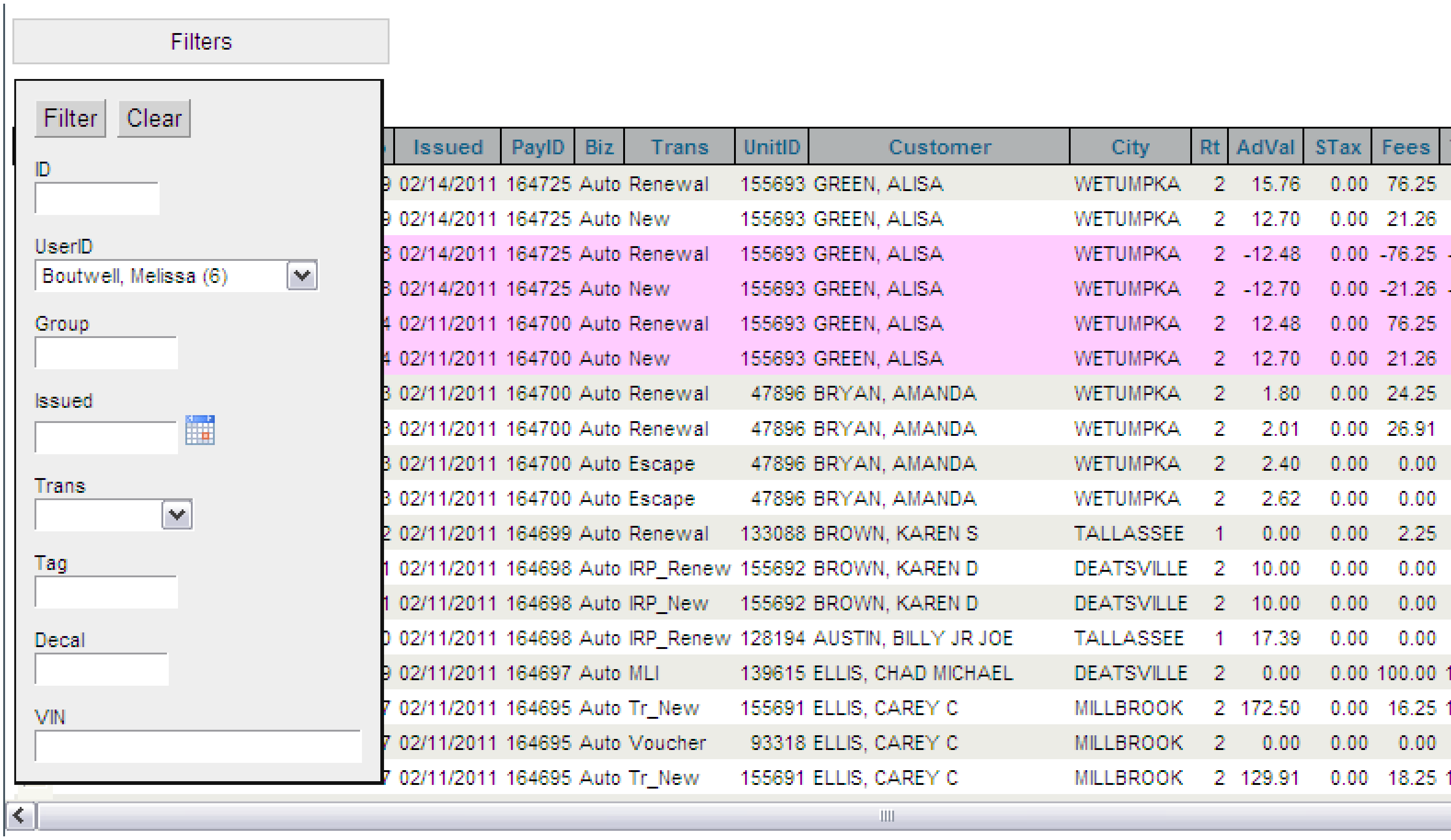
For a clerk to look at particular pieces of a transaction the clerk can right click the transaction that they want to view and a menu will appear. This will allow the supervisors to view transactions and to edit customer information. ['Refunds'] and ['Redos'] of any business type can be completed from this tab also.



Auto Tab

Filter Menu

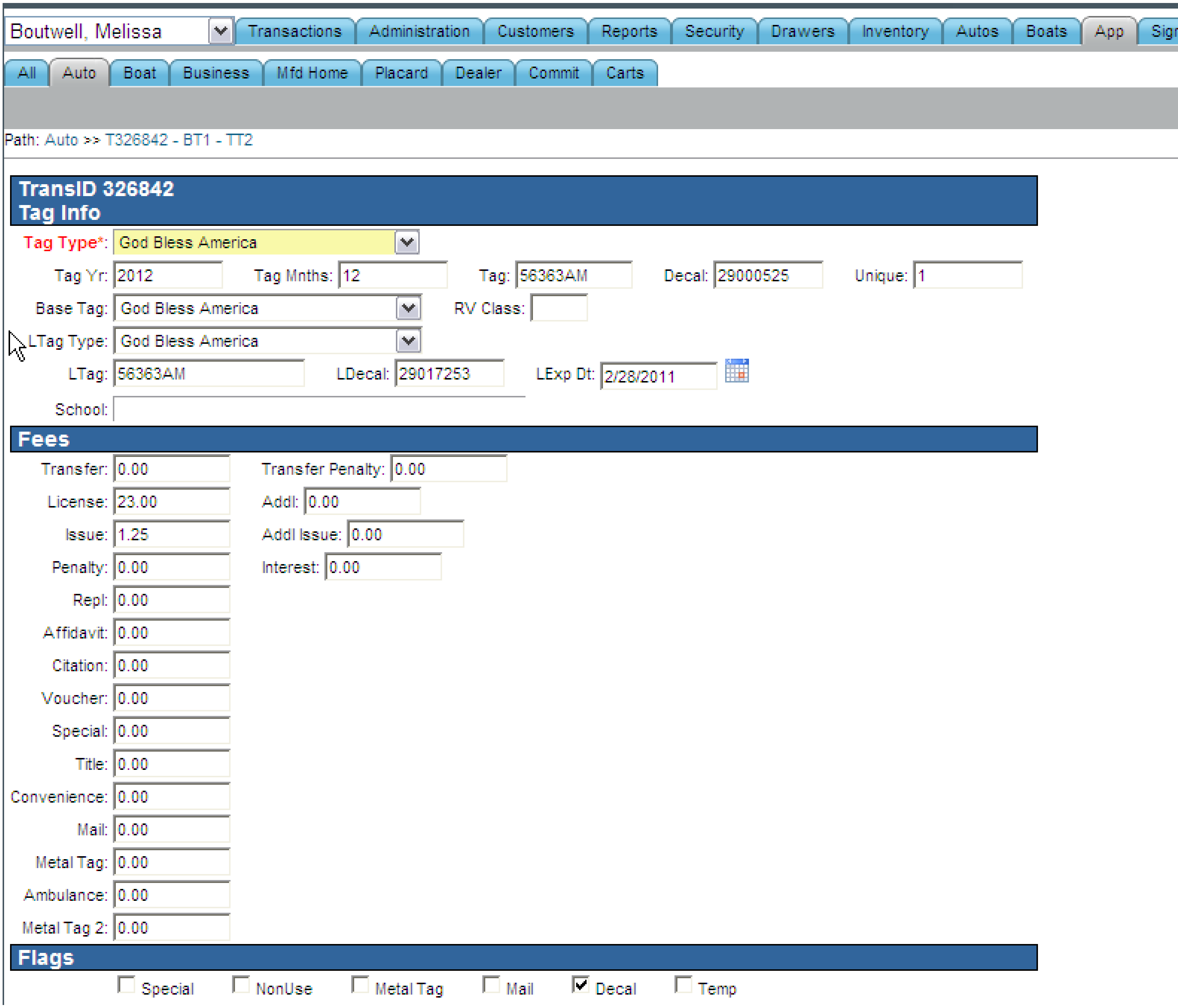
The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.



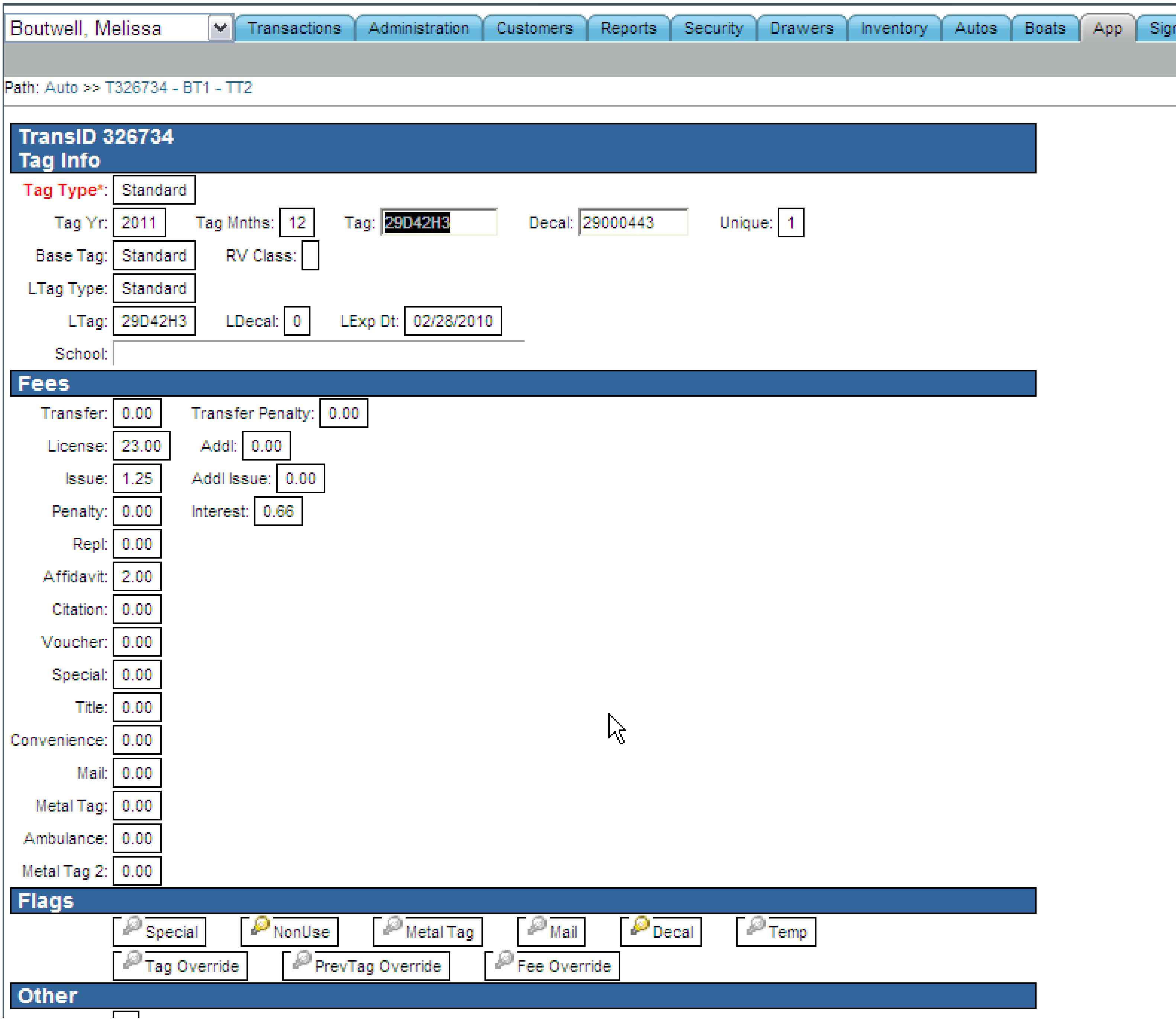
Issued	PayID	Biz	Trans	UnitID	Customer	City	Rt	AdVal	STax	Fees
02/14/2011	164725	Auto	Renewal	155693	GREEN, ALISA	WETUMPKA	2	15.76	0.00	76.25
02/14/2011	164725	Auto	New	155693	GREEN, ALISA	WETUMPKA	2	12.70	0.00	21.26
02/14/2011	164725	Auto	Renewal	155693	GREEN, ALISA	WETUMPKA	2	-12.48	0.00	-76.25
02/14/2011	164725	Auto	New	155693	GREEN, ALISA	WETUMPKA	2	-12.70	0.00	-21.26
02/11/2011	164700	Auto	Renewal	155693	GREEN, ALISA	WETUMPKA	2	12.48	0.00	76.25
02/11/2011	164700	Auto	New	155693	GREEN, ALISA	WETUMPKA	2	12.70	0.00	21.26
02/11/2011	164700	Auto	Renewal	47896	BRYAN, AMANDA	WETUMPKA	2	1.80	0.00	24.25
02/11/2011	164700	Auto	Renewal	47896	BRYAN, AMANDA	WETUMPKA	2	2.01	0.00	26.91
02/11/2011	164700	Auto	Escape	47896	BRYAN, AMANDA	WETUMPKA	2	2.40	0.00	0.00
02/11/2011	164700	Auto	Escape	47896	BRYAN, AMANDA	WETUMPKA	2	2.62	0.00	0.00
02/11/2011	164699	Auto	Renewal	133088	BROWN, KAREN S	TALLASSEE	1	0.00	0.00	2.25
02/11/2011	164698	Auto	IRP_Renew	155692	BROWN, KAREN D	DEATSVILLE	2	10.00	0.00	0.00
02/11/2011	164698	Auto	IRP_New	155692	BROWN, KAREN D	DEATSVILLE	2	10.00	0.00	0.00
02/11/2011	164698	Auto	IRP_Renew	128194	AUSTIN, BILLY JR JOE	TALLASSEE	1	17.39	0.00	0.00
02/11/2011	164697	Auto	MLI	139615	ELLIS, CHAD MICHAEL	DEATSVILLE	2	0.00	0.00	100.00
02/11/2011	164695	Auto	Tr_New	155691	ELLIS, CAREY C	MILLBROOK	2	172.50	0.00	16.25
02/11/2011	164695	Auto	Voucher	93318	ELLIS, CAREY C	MILLBROOK	2	0.00	0.00	0.00
02/11/2011	164695	Auto	Tr_New	155691	ELLIS, CAREY C	MILLBROOK	2	129.91	0.00	18.25

Auto Trans

Under the 'Auto Trans' selection on the Transaction menu the clerk is able to view the breakdown of tag fees and the tag information that was selected during this transaction. Any information under the 'Auto Trans' can be edited by a supervisor on the day that the transaction was completed.

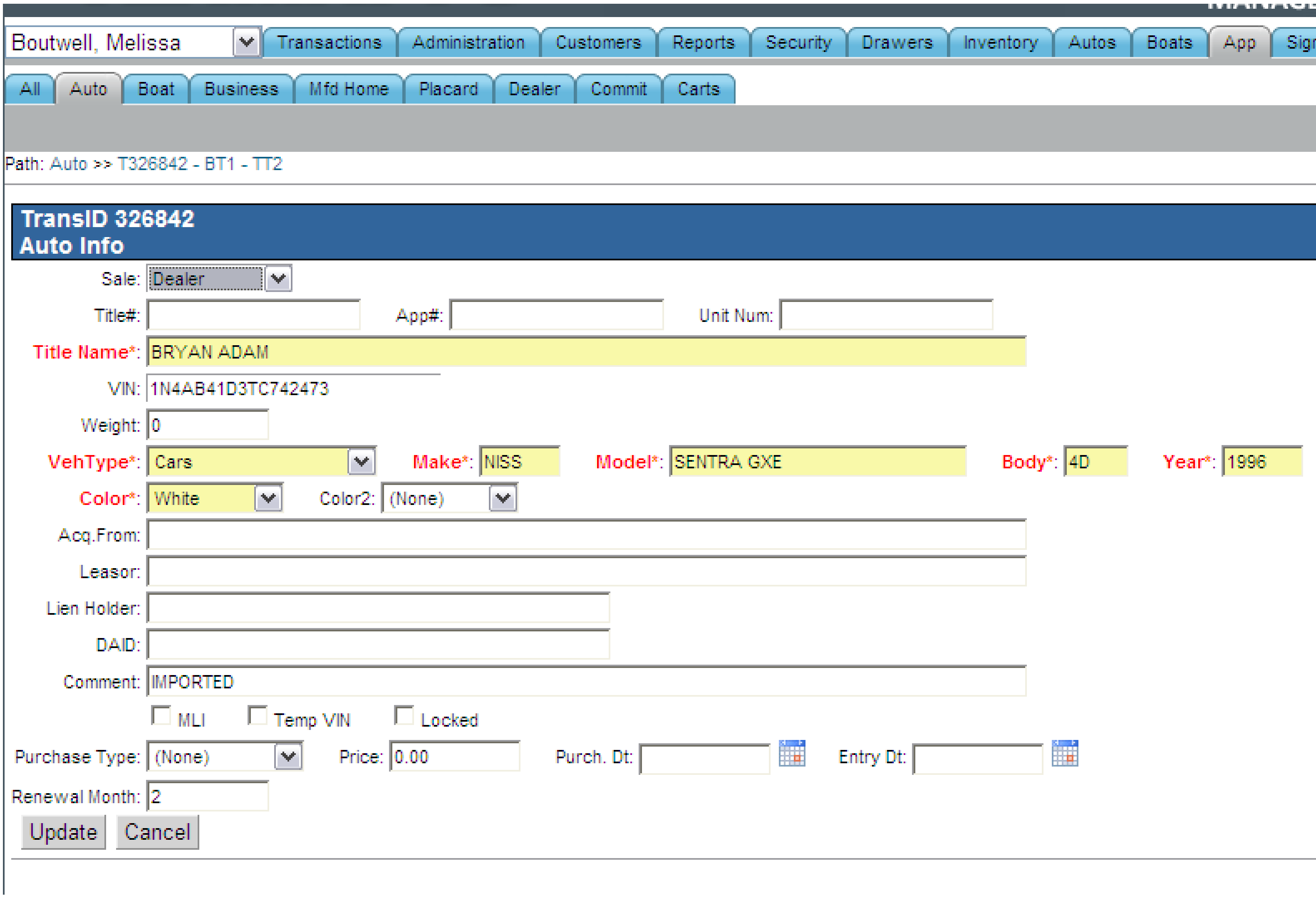


The only items that the supervisors are able to edit after the transaction date are the tag number and the decal number. Any other items that need to be adjusted must be done through the 'Redo' transaction type.

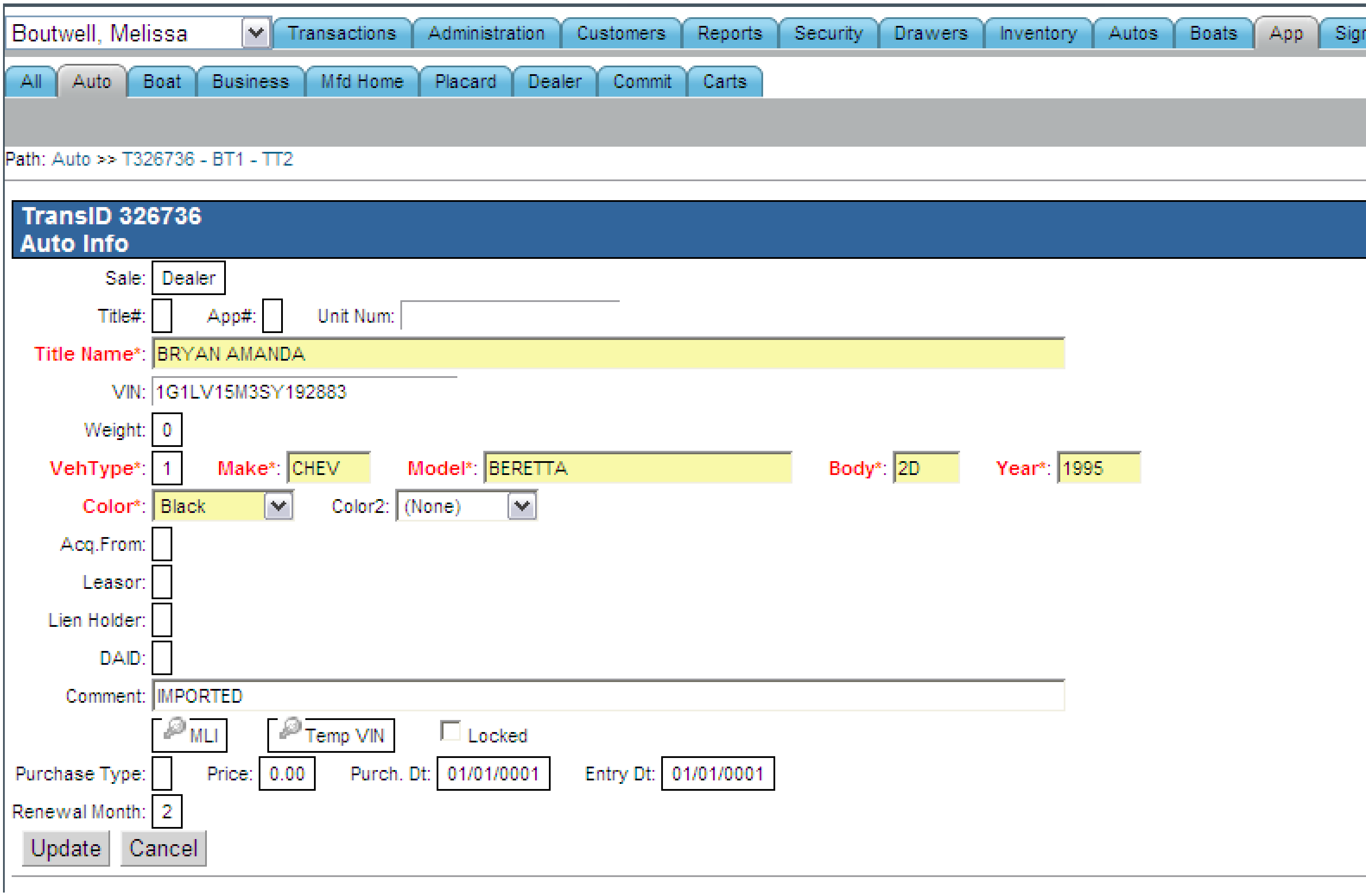


Auto

Under the 'Auto' selection on the Transaction menu, the clerk is able to view the transactions vehicle information. Any information under 'Auto' can be edited by a supervisor on the day that the transaction was completed.

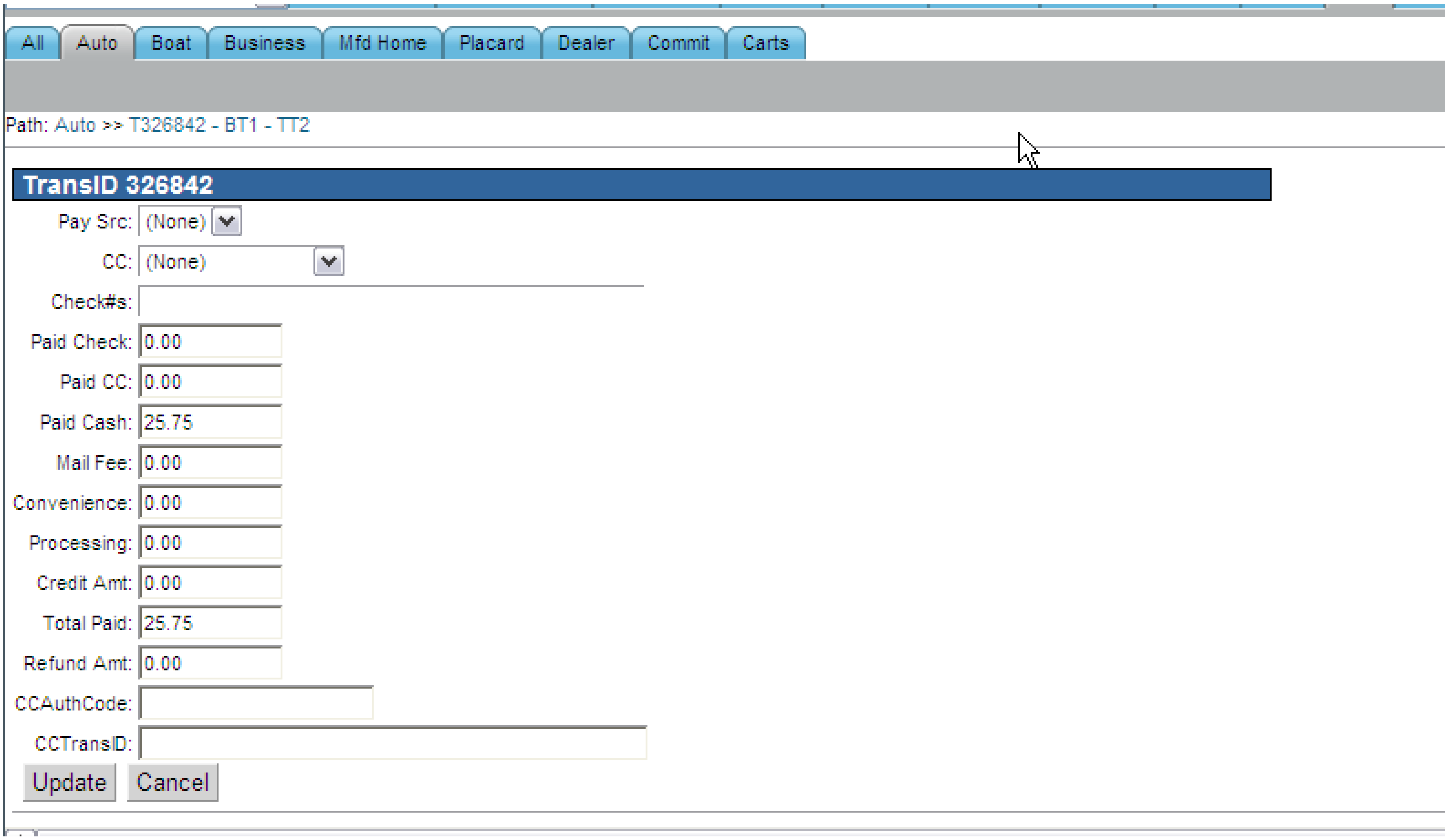


The only items that the supervisors are able to edit after the transaction date are the title name, the vin number, and the automobiles features. Any other items that need to be adjusted must be done through the ['Redo'] transaction type.



Payment

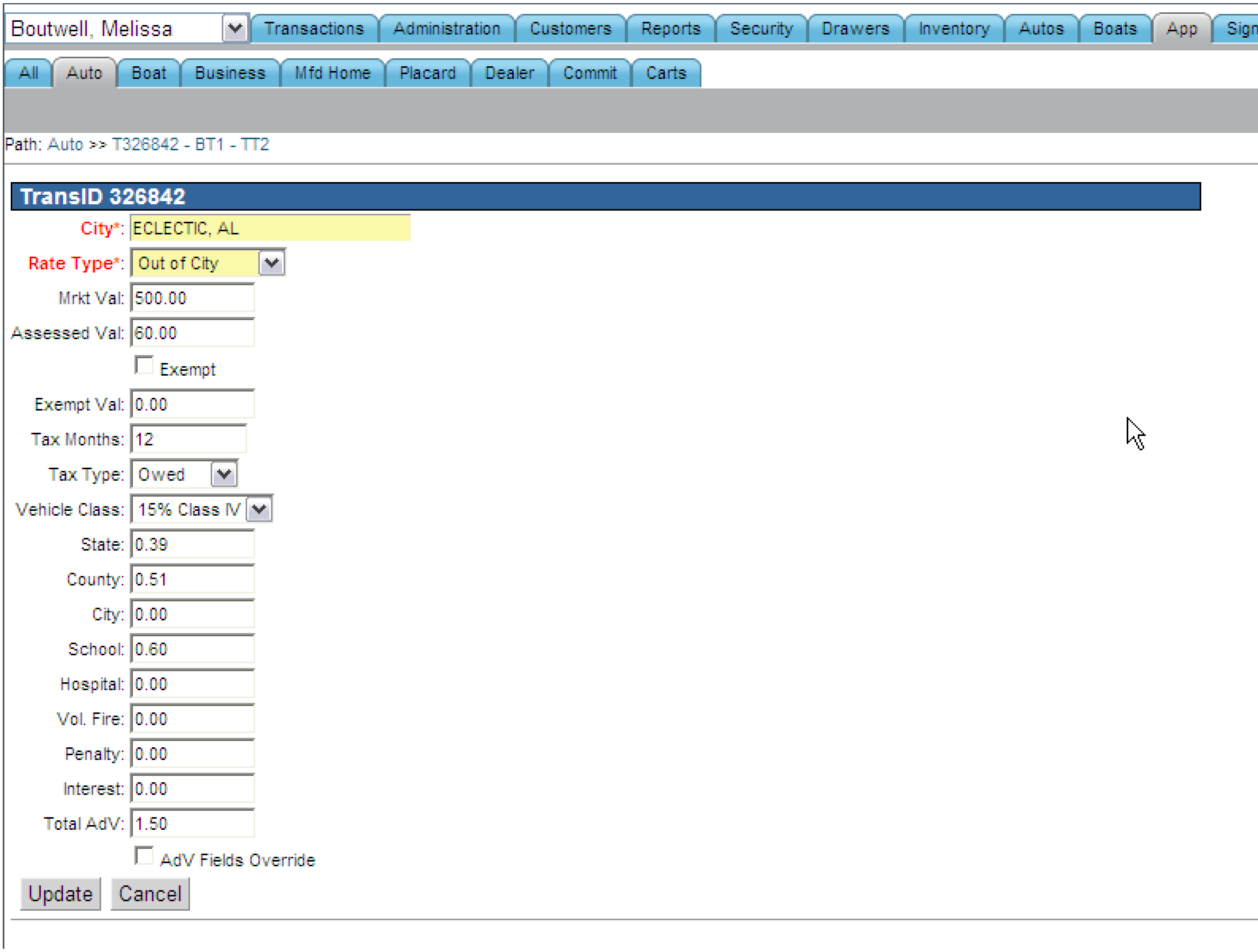
Under the 'Payment' selection on the Transaction menu, the clerk is able to view the payment information for a particular transaction or a group of transactions. Any information under the 'Payment' can be edited by a supervisor on the day that the transaction was completed.



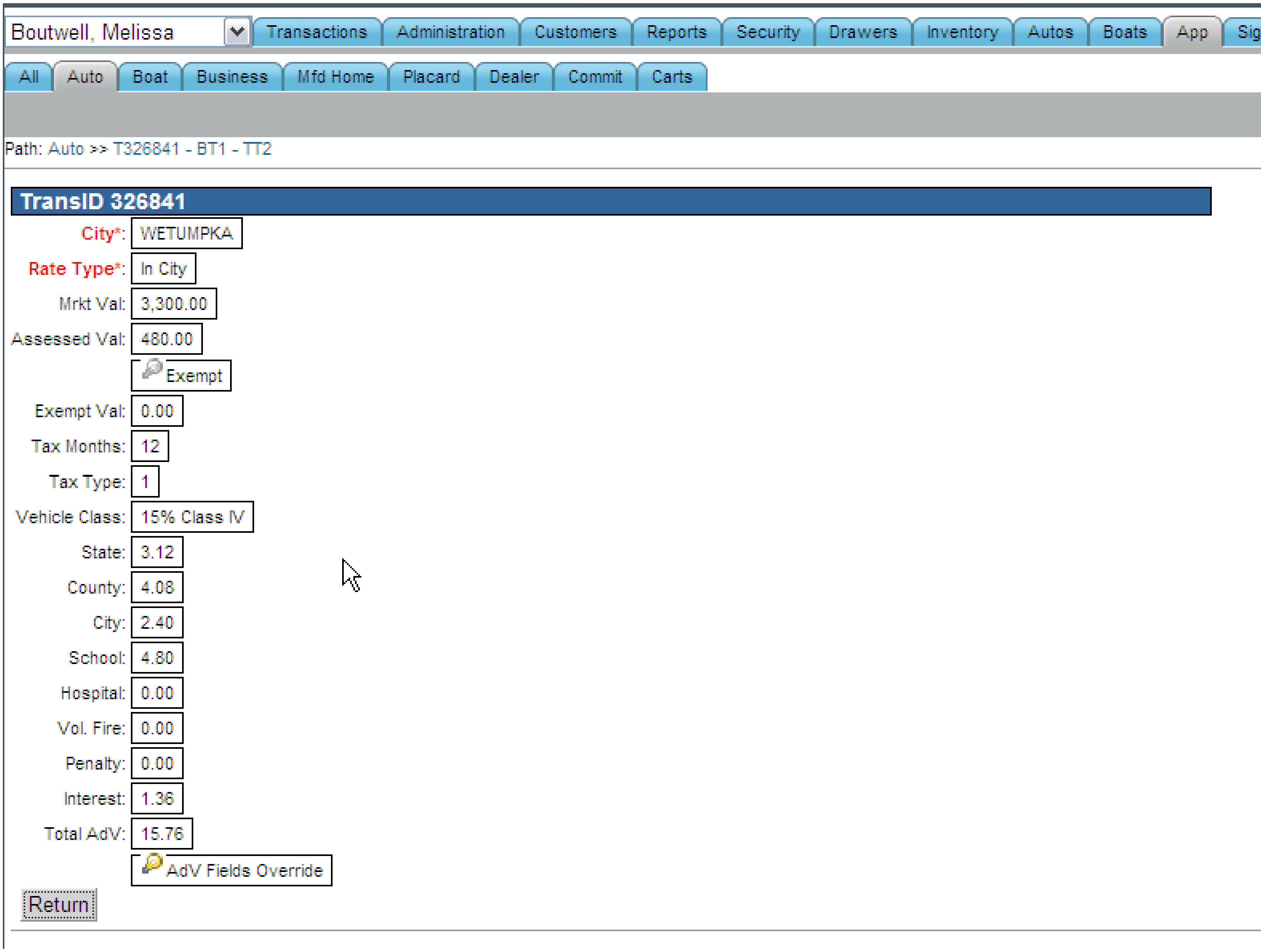
The supervisors are unable to edit the payment information after the original transaction date.

AdValorem

Under the 'AdValorem' selection on the Transaction menu, the clerk is able to view the advalorem information for a particular transaction. Any information under the 'AdValorem' can be edited by a supervisor on the day that the transaction was completed.



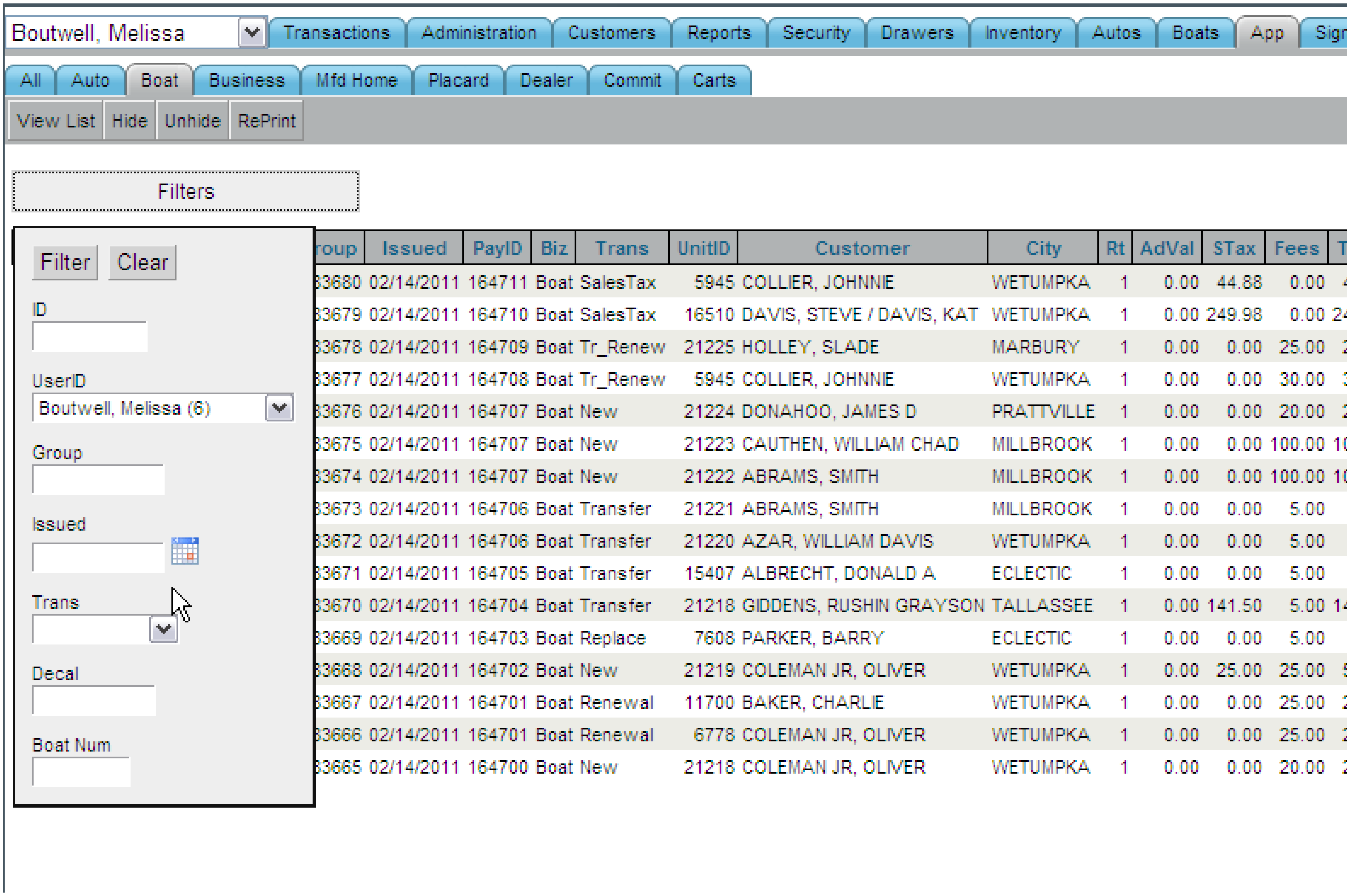
The supervisors are unable to edit the advalorem information after the original transaction date.



Boat Tab

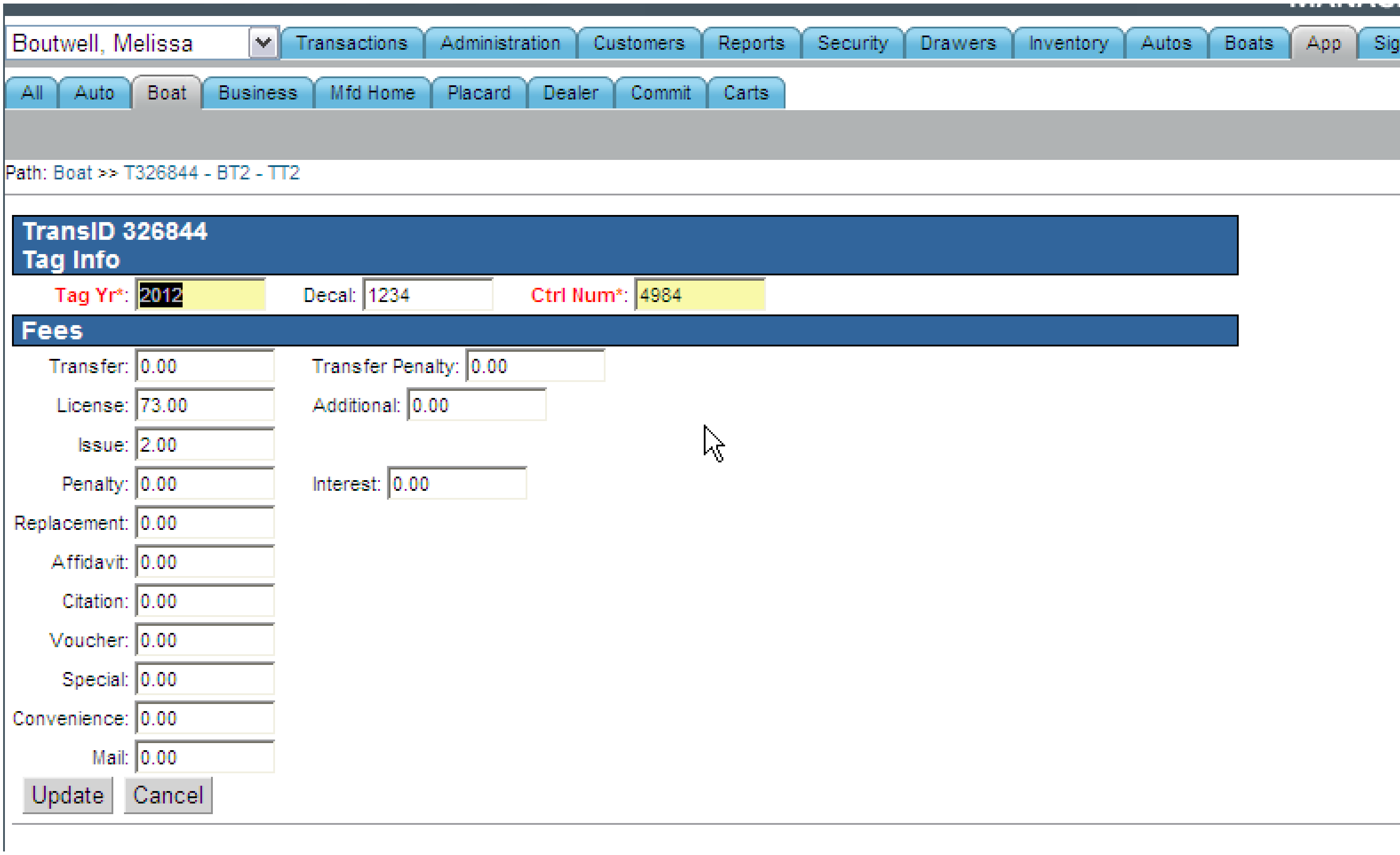
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.

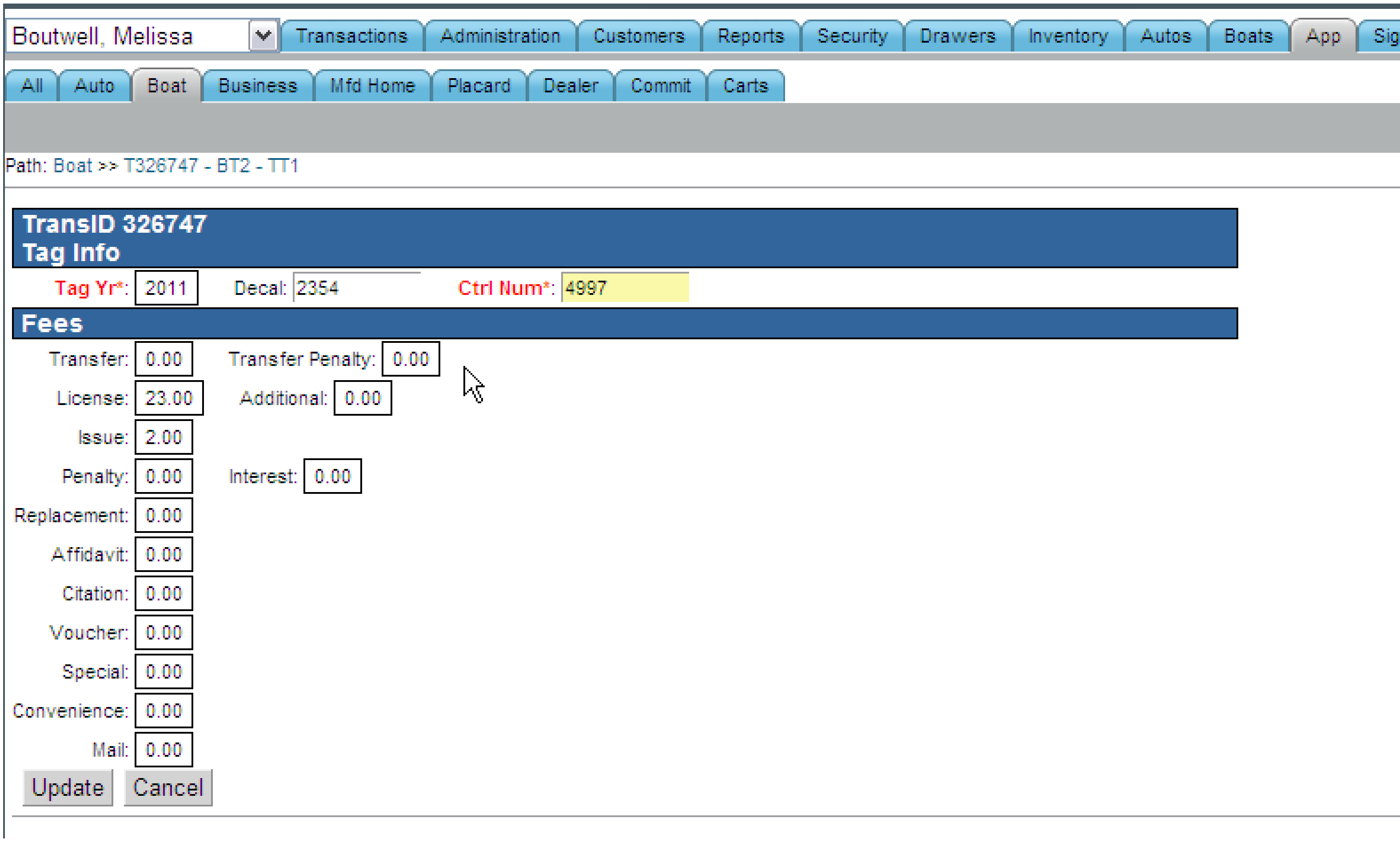


Boat Trans

Under the 'Boat Trans' selection on the Transaction menu the clerk is able to view the breakdown of boat fees and the decal number that was assigned during this transaction. Any information under the 'Boat Trans' can be edited by a supervisor on the day that the transaction was completed.

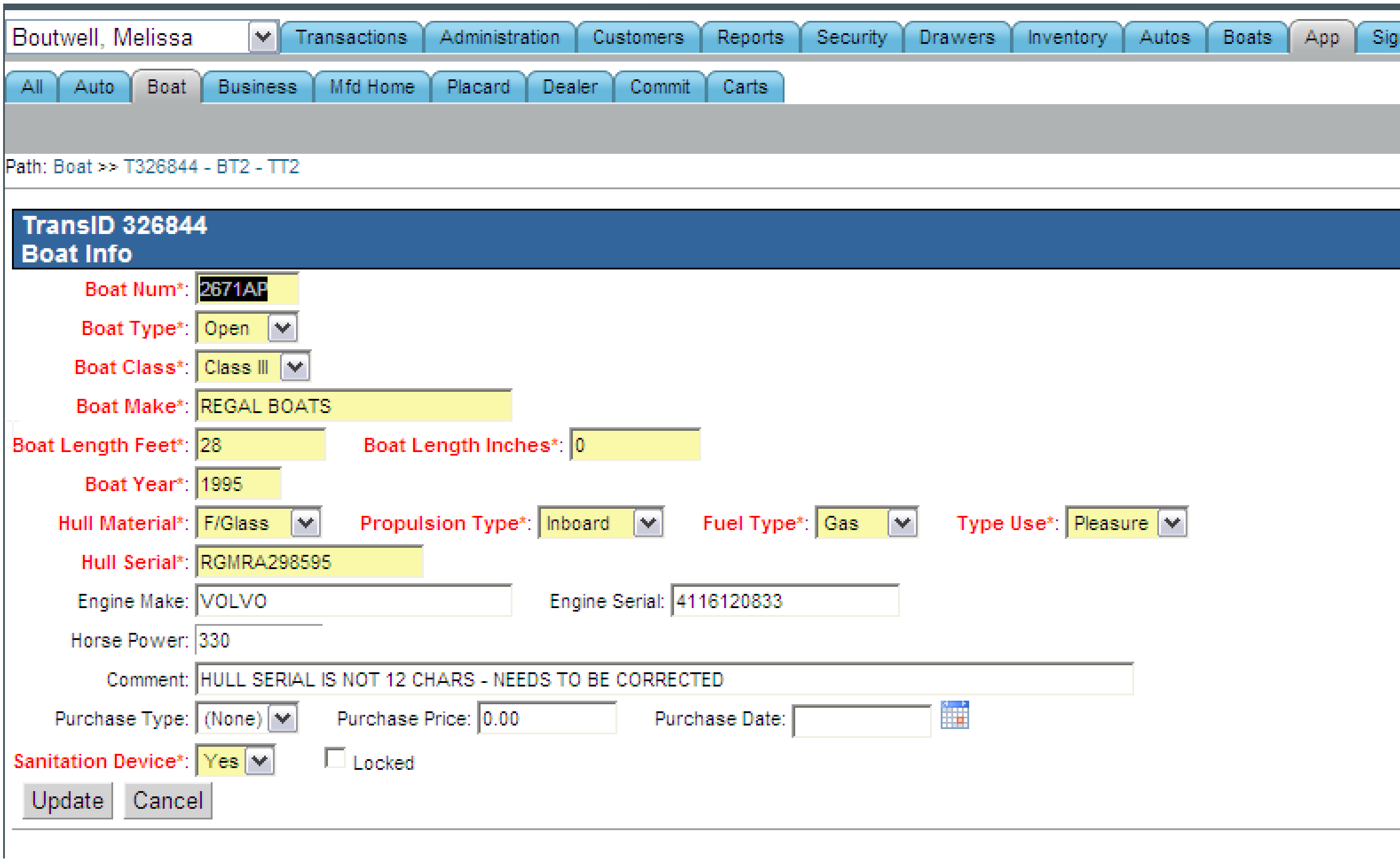


The only items that the supervisors are able to edit after the transaction date are the control number and the decal number. Any other items that need to be adjusted must be done through the 'Redo' transaction type.

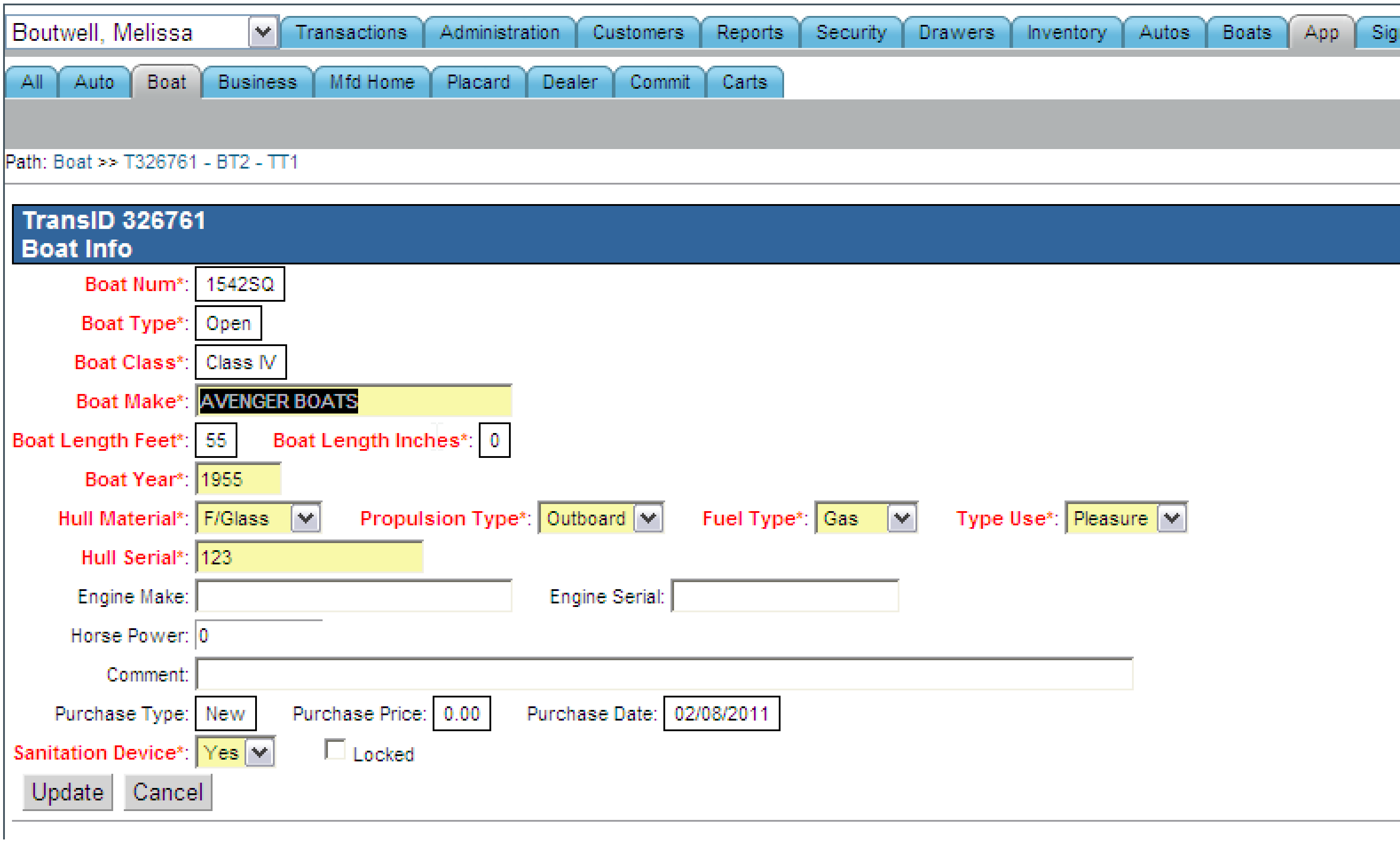


Boat

Under the 'Boat' selection on the Transaction menu, the clerk is able to view the transactions boat information. Any information under 'Boat' can be edited by a supervisor on the day that the transaction was completed.

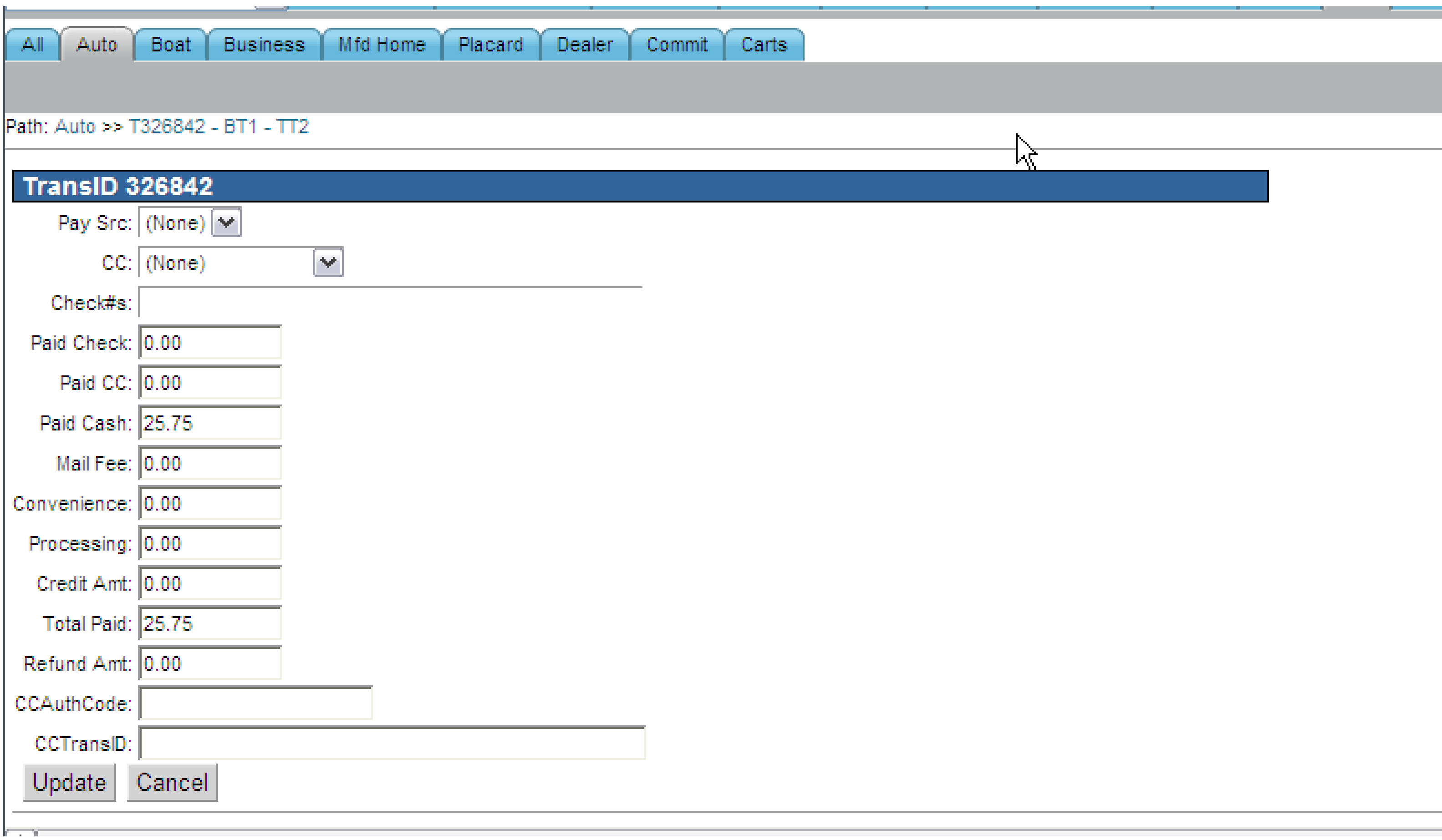


The only items that the supervisors are able to edit after the transaction date are the boat make, the boat year, and the boats features. Any other items that need to be adjusted must be done through the ['Redo'] transaction type.



Payment

Under the 'Payment' selection on the Transaction menu, the clerk is able to view the payment information for a particular transaction or a group of transactions. Any information under the 'Payment' can be edited by a supervisor on the day that the transaction was completed.

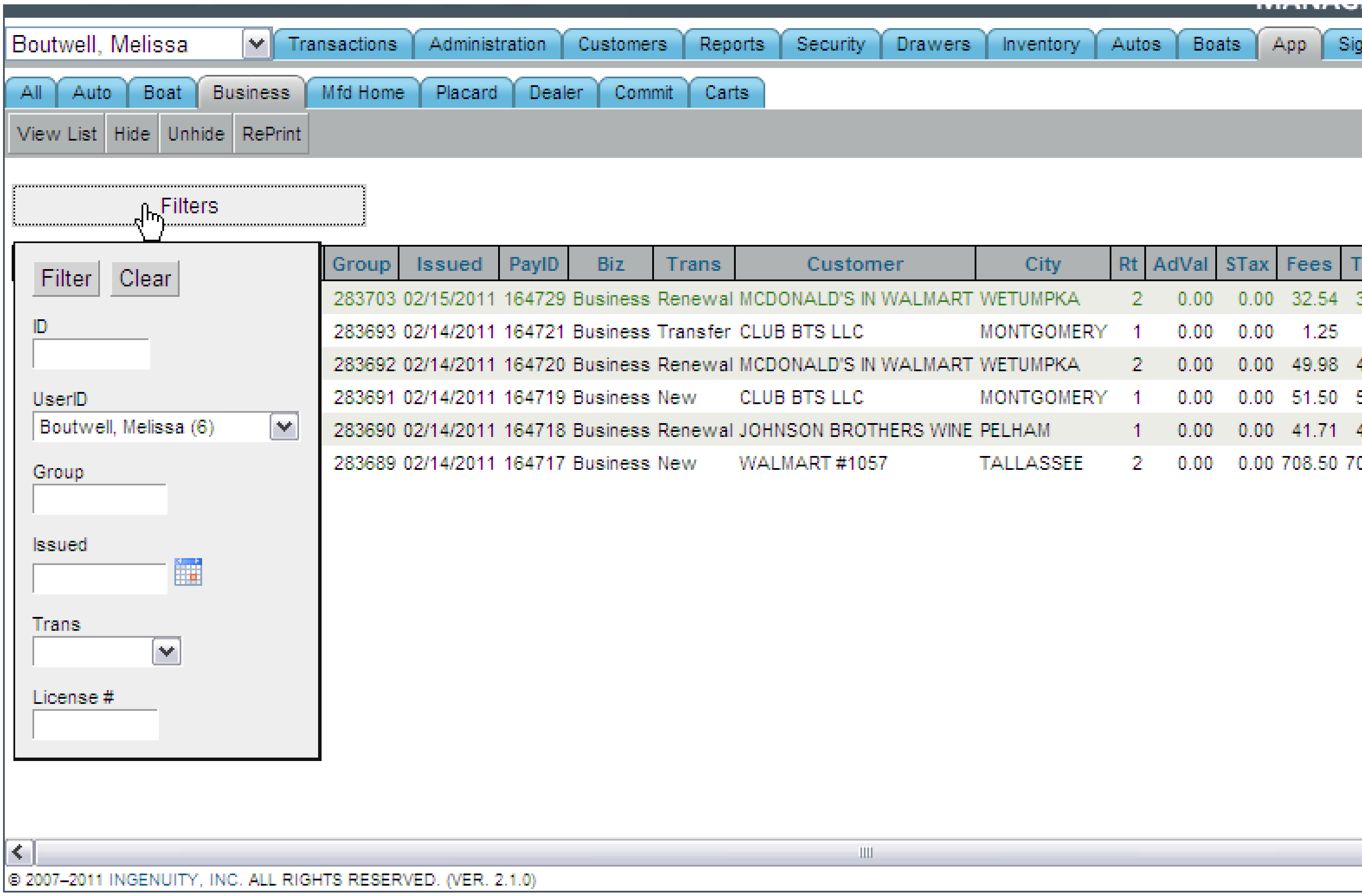


The supervisors are unable to edit the payment information after the original transaction date.

Business Tab

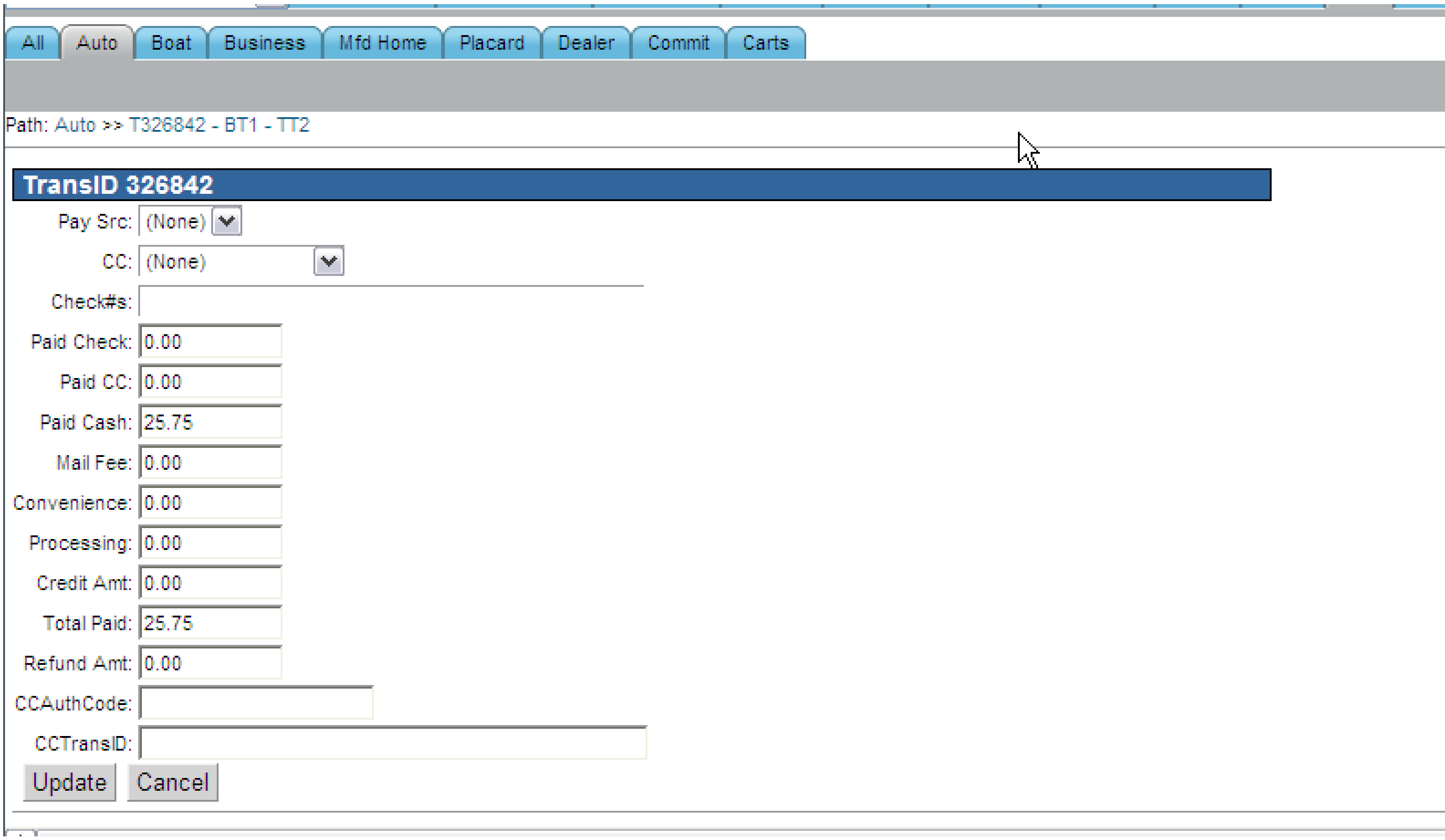
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.



Payment

Under the 'Payment' selection on the Transaction menu, the clerk is able to view the payment information for a particular transaction or a group of transactions. Any information under the 'Payment' can be edited by a supervisor on the day that the transaction was completed.

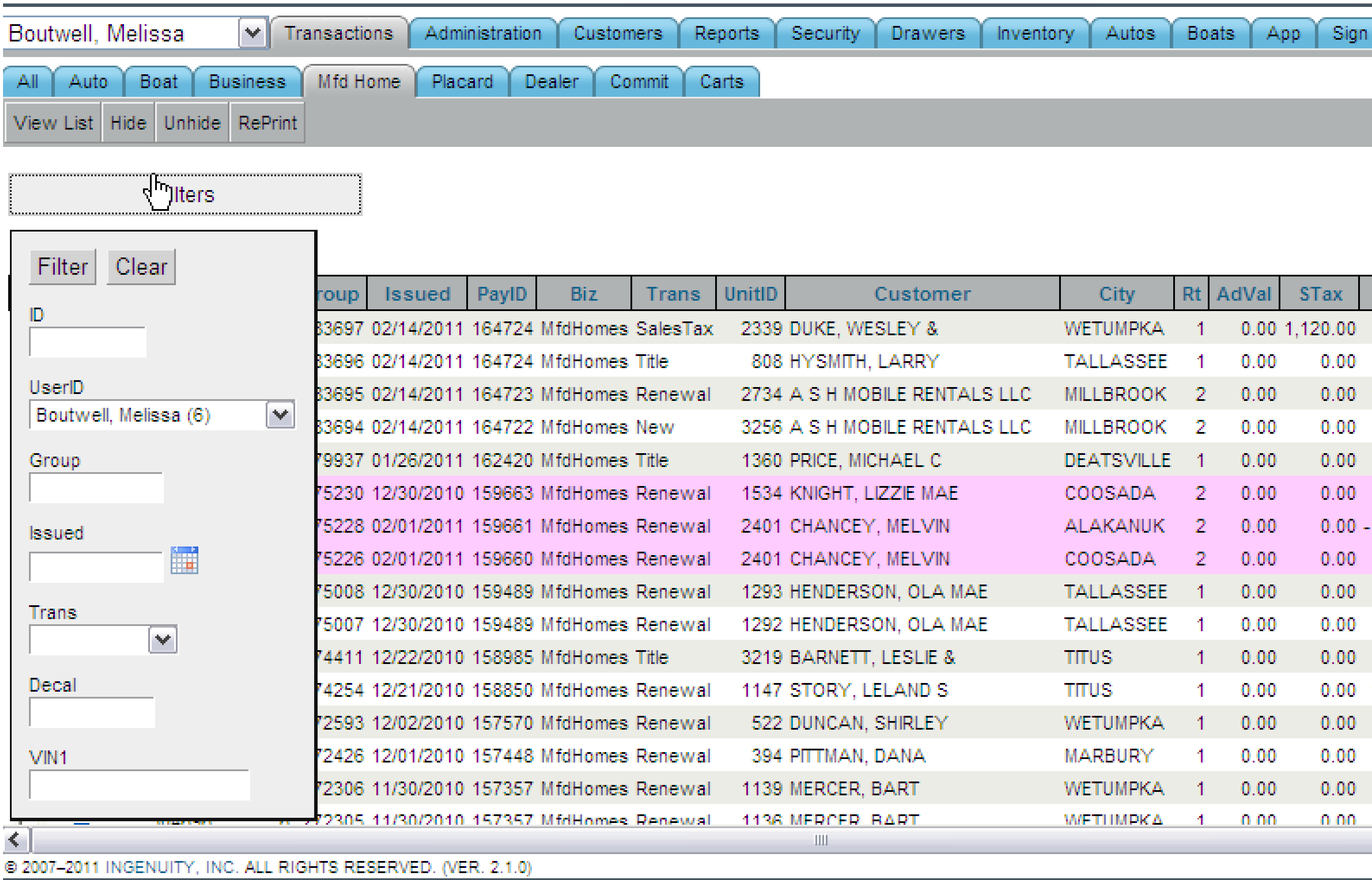


The supervisors are unable to edit the payment information after the original transaction date.

Mfd Home Tab

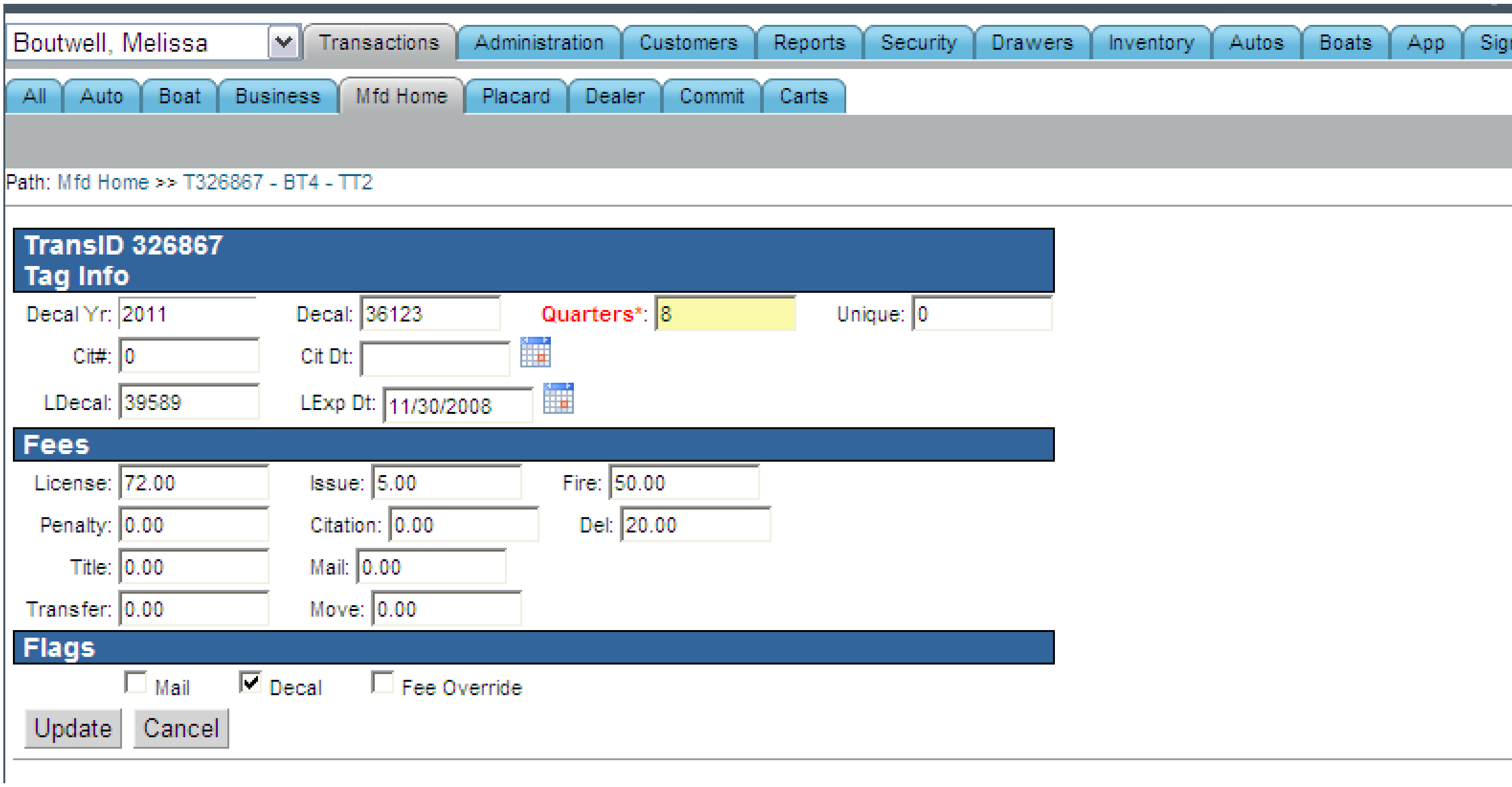
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.

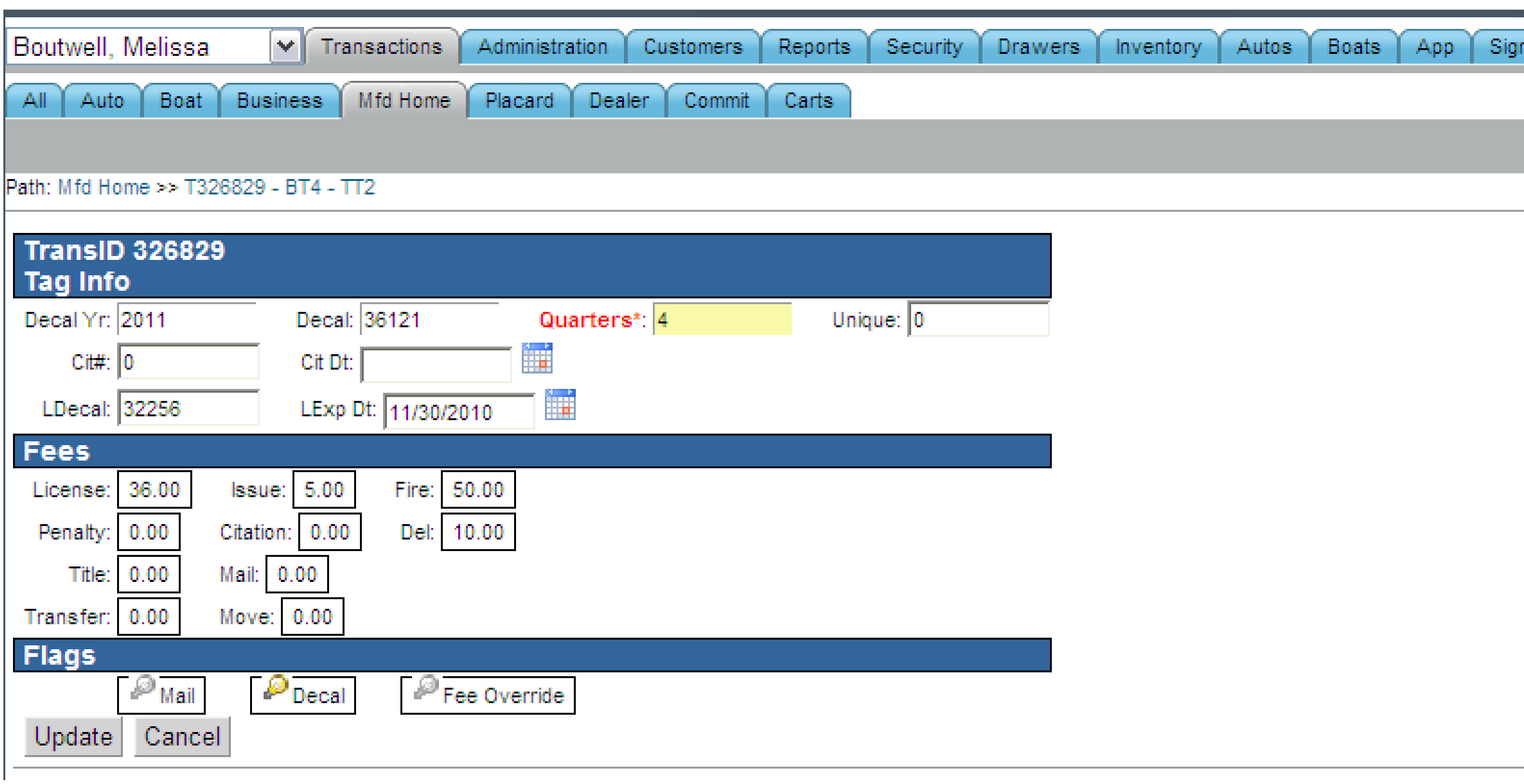


MfdHome Trans

Under the 'MfdHome Trans' selection on the Transaction menu the clerk is able to view the breakdown of fees and the decal information that was assigned during this transaction. Any information under the 'MfdHome Trans' can be edited by a supervisor on the day that the transaction was completed.

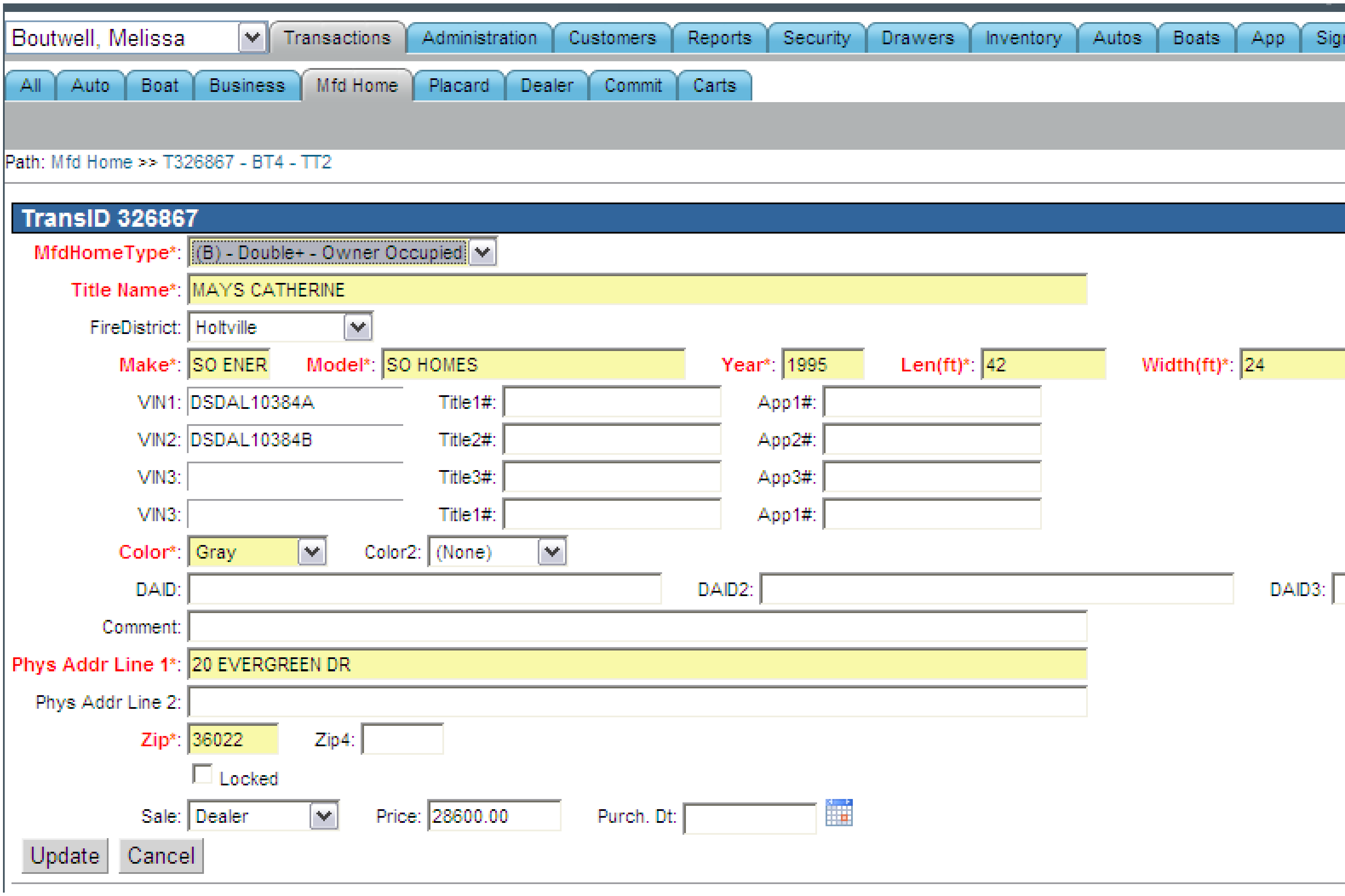


The only items that the supervisors are able to edit after the transaction date are the decal year, the decal number, and the number of quarters.

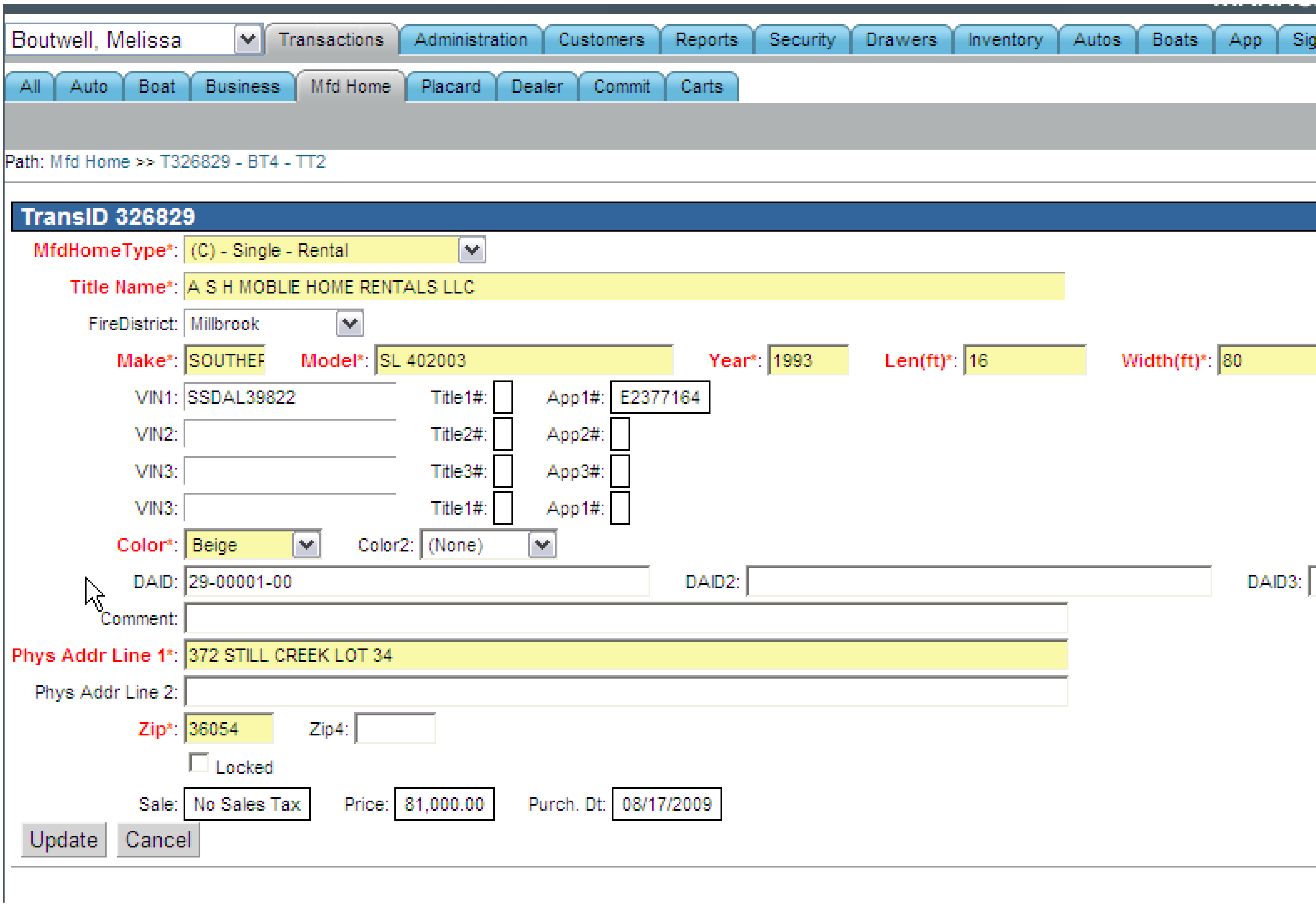


MfdHome

Under the 'MfdHome' selection on the Transaction menu, the clerk is able to view the transactions manufactured home information. Any information under 'MfdHome' can be edited by a supervisor on the day that the transaction was completed.

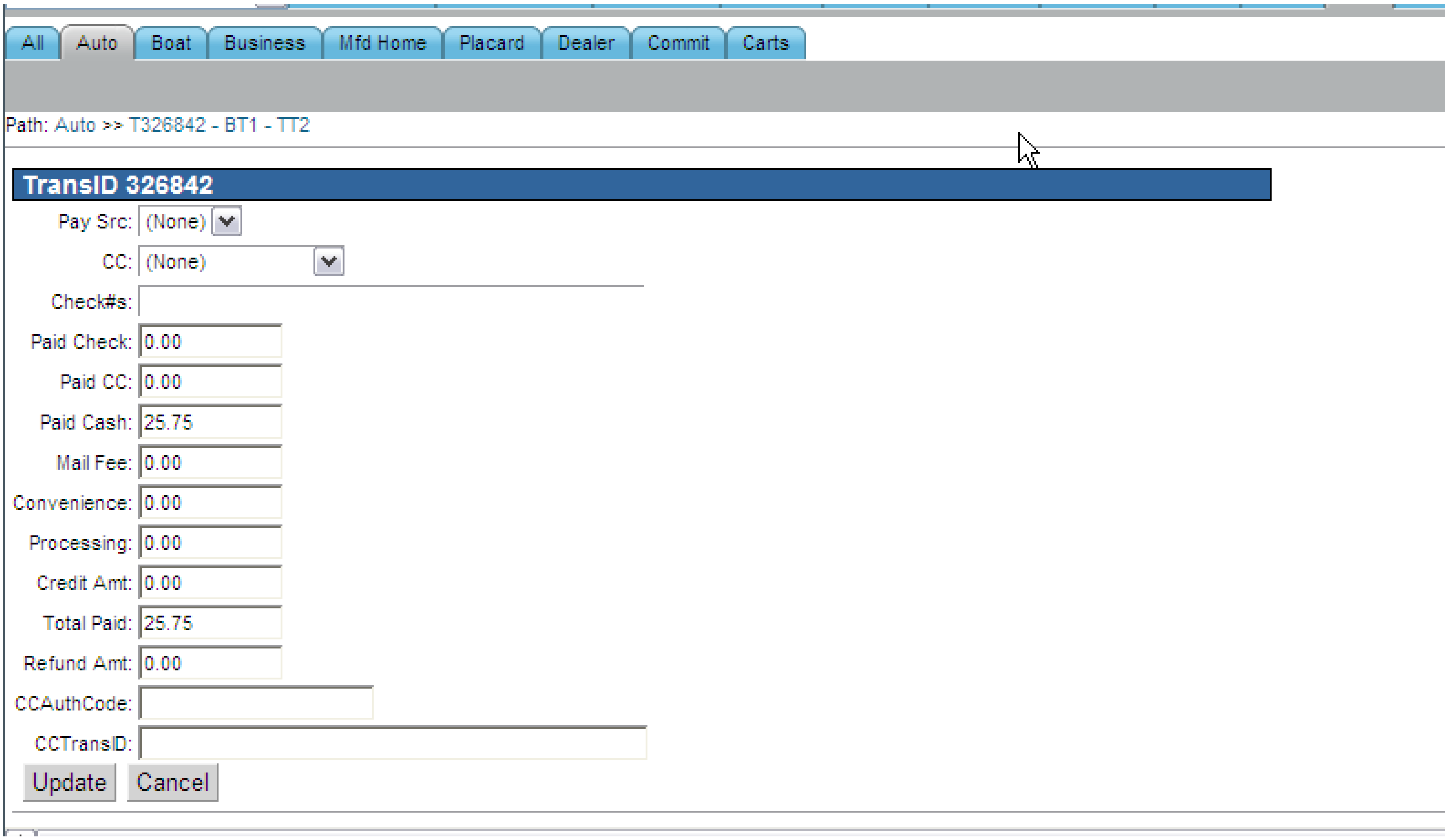


The supervisor is allowed to edit all of the manufactured home information after the completed transaction date except for the title number or the application number.



Payment

Under the 'Payment' selection on the Transaction menu, the clerk is able to view the payment information for a particular transaction or a group of transactions. Any information under the 'Payment' can be edited by a supervisor on the day that the transaction was completed.

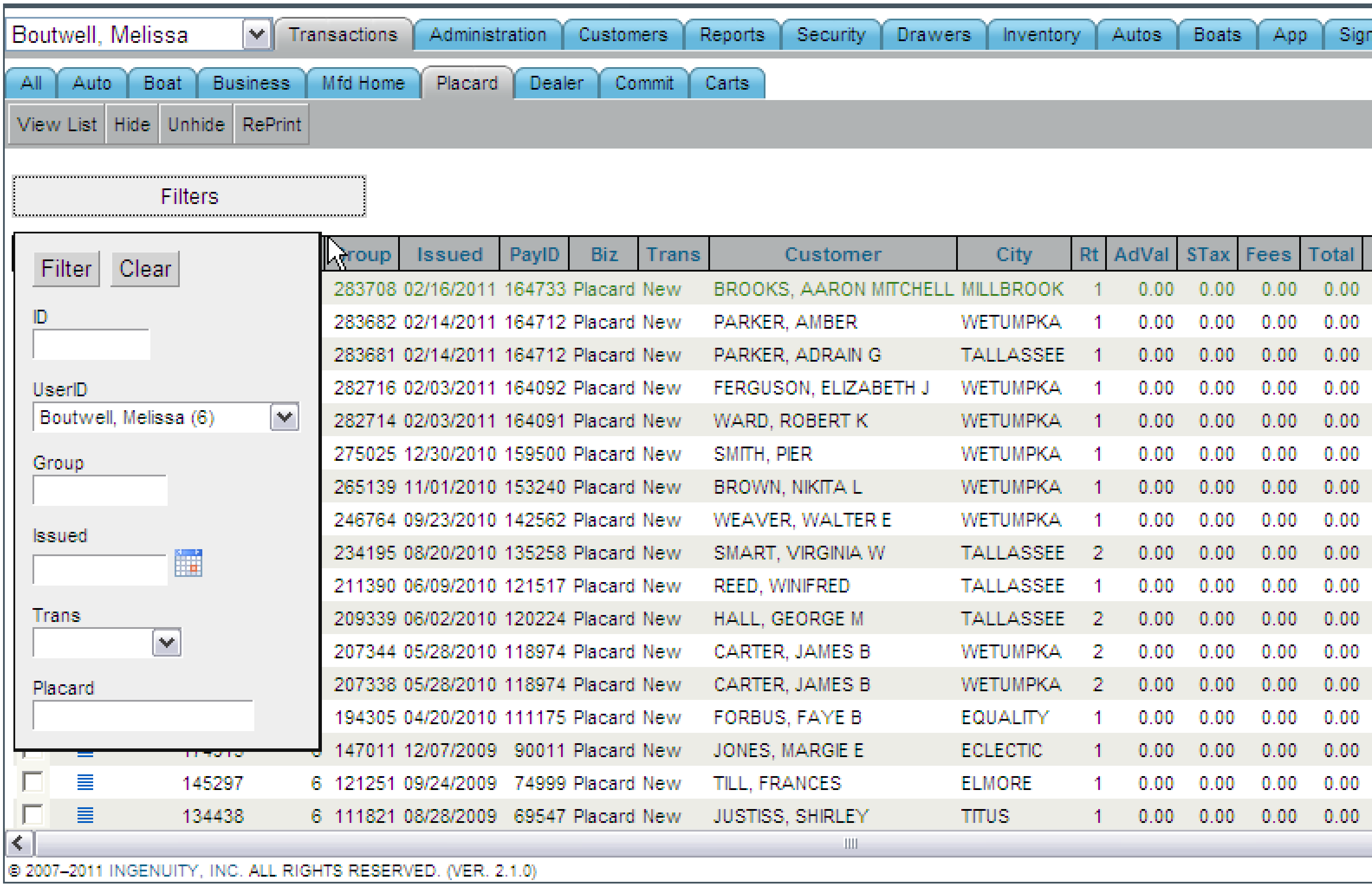


The supervisors are unable to edit the payment information after the original transaction date.

Placard Tab

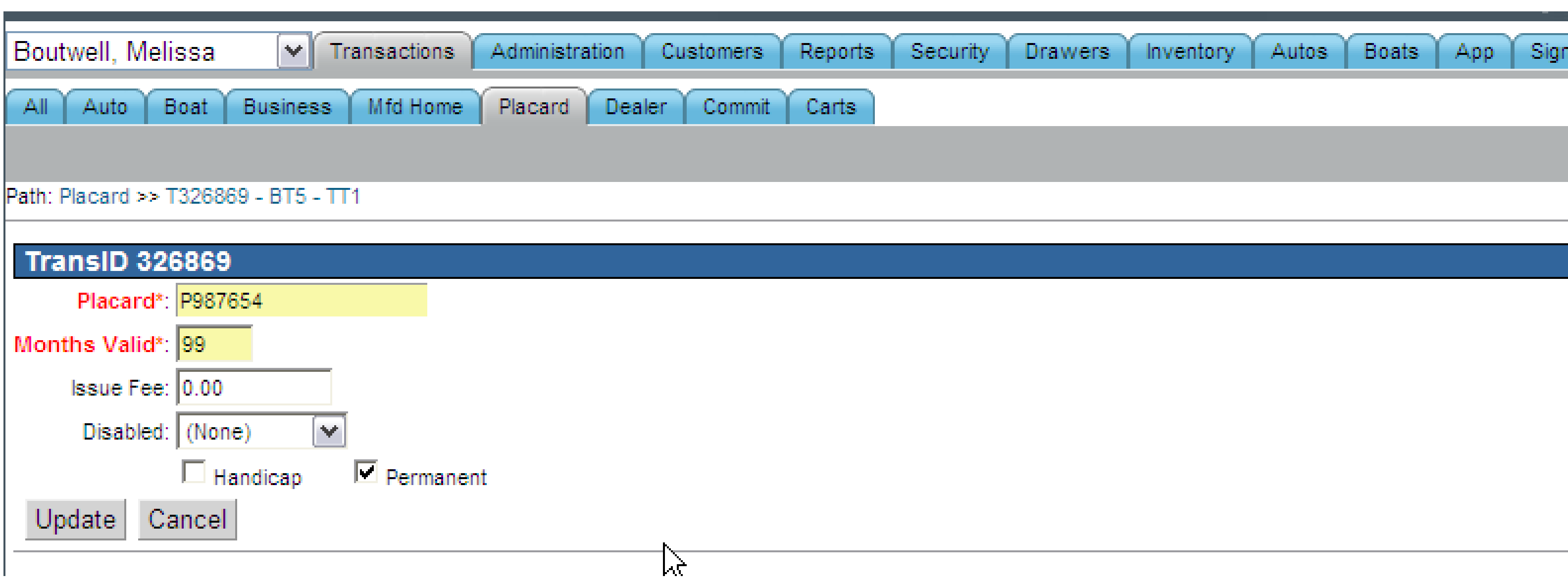
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.



Placard Trans

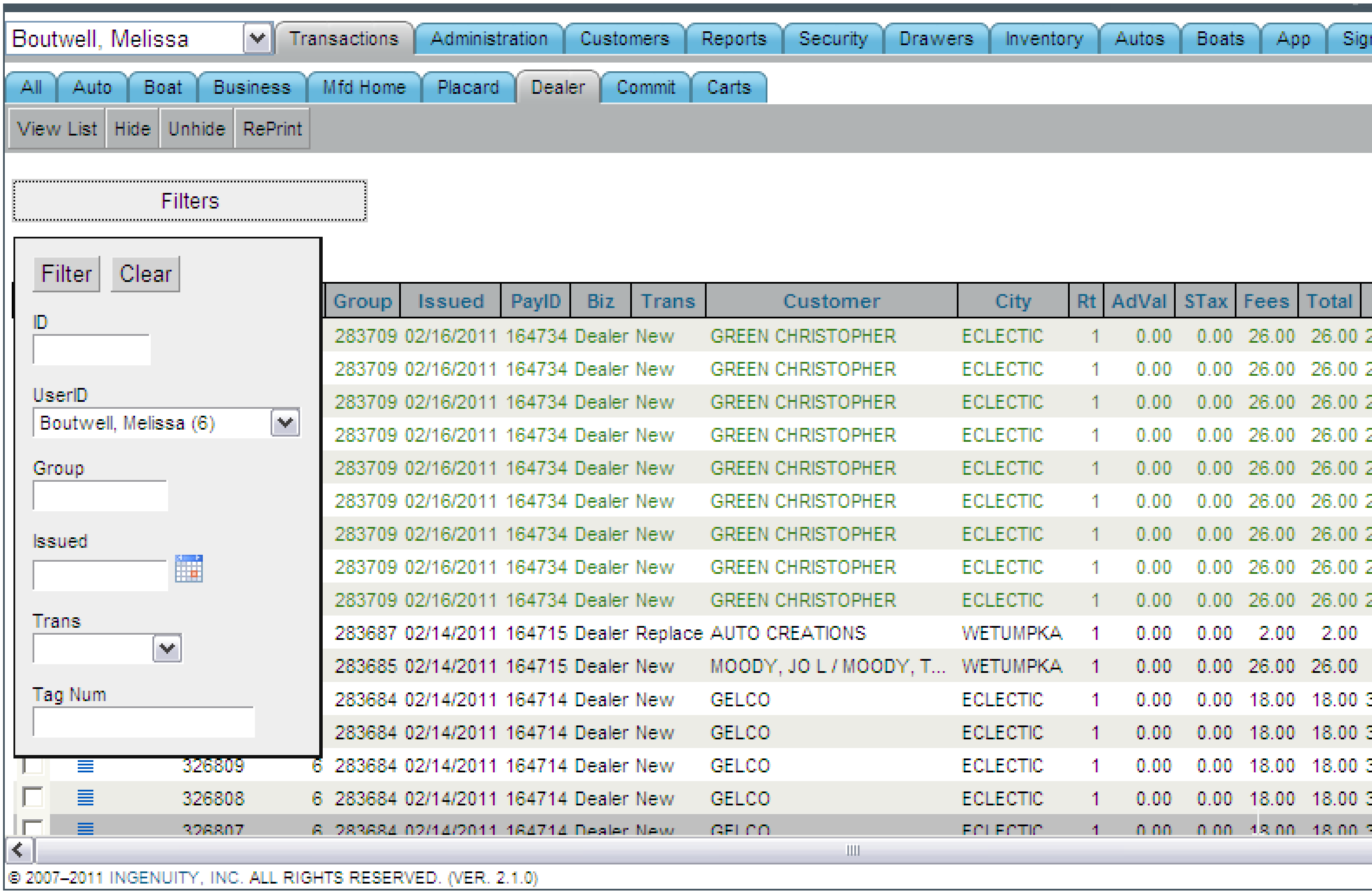
Under the 'Placard Trans' selection on the Transaction menu the clerk is able to view the placard number and the number of valid months assigned to that placard transaction. Any information under the 'Placard Trans' can be edited by a supervisor.



Dealer Tab

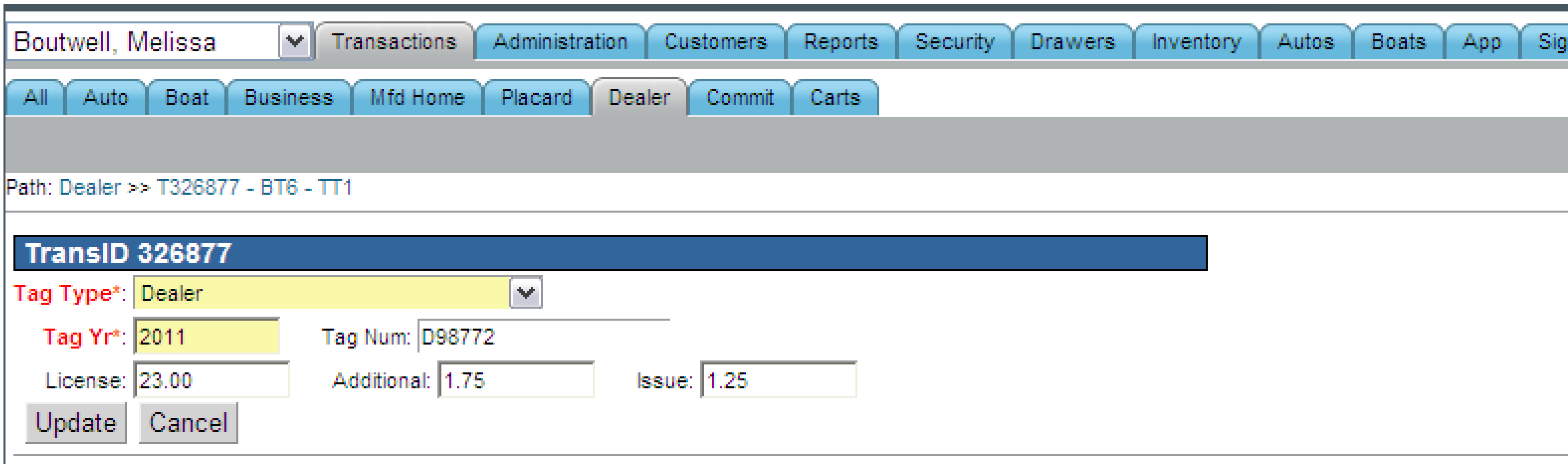
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.

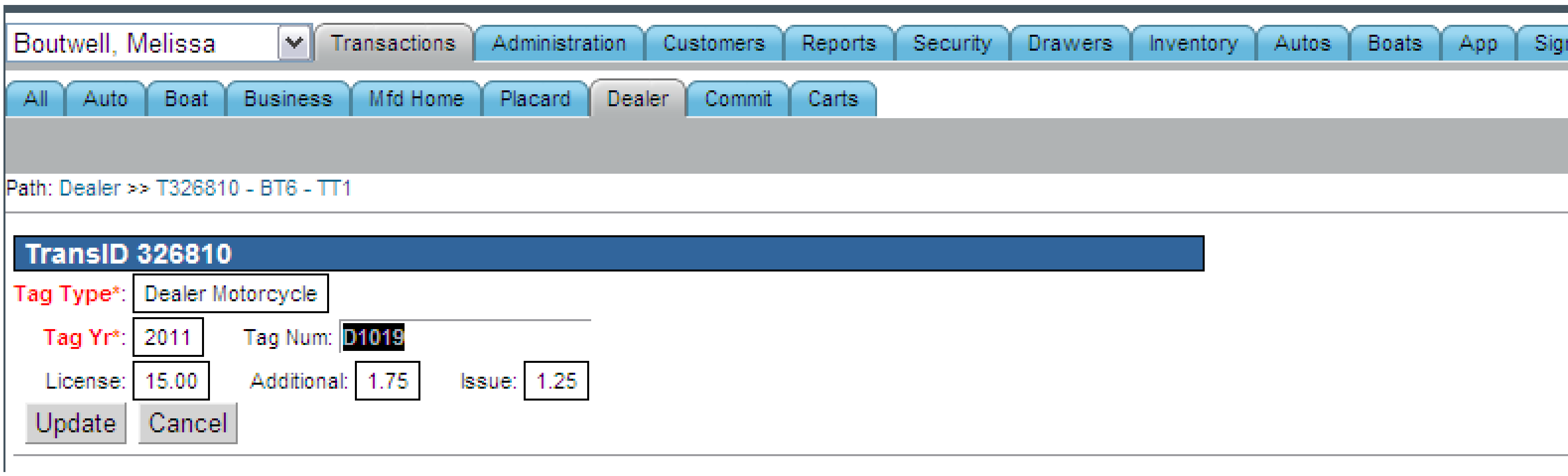


Dealer Trans

Under the 'Dealer Trans' selection on the Transaction menu the clerk is able to view the breakdown of tag fees and the tag information that was selected during this transaction. Any information under the 'Dealer Trans' can be edited by a supervisor on the day that the transaction was completed.

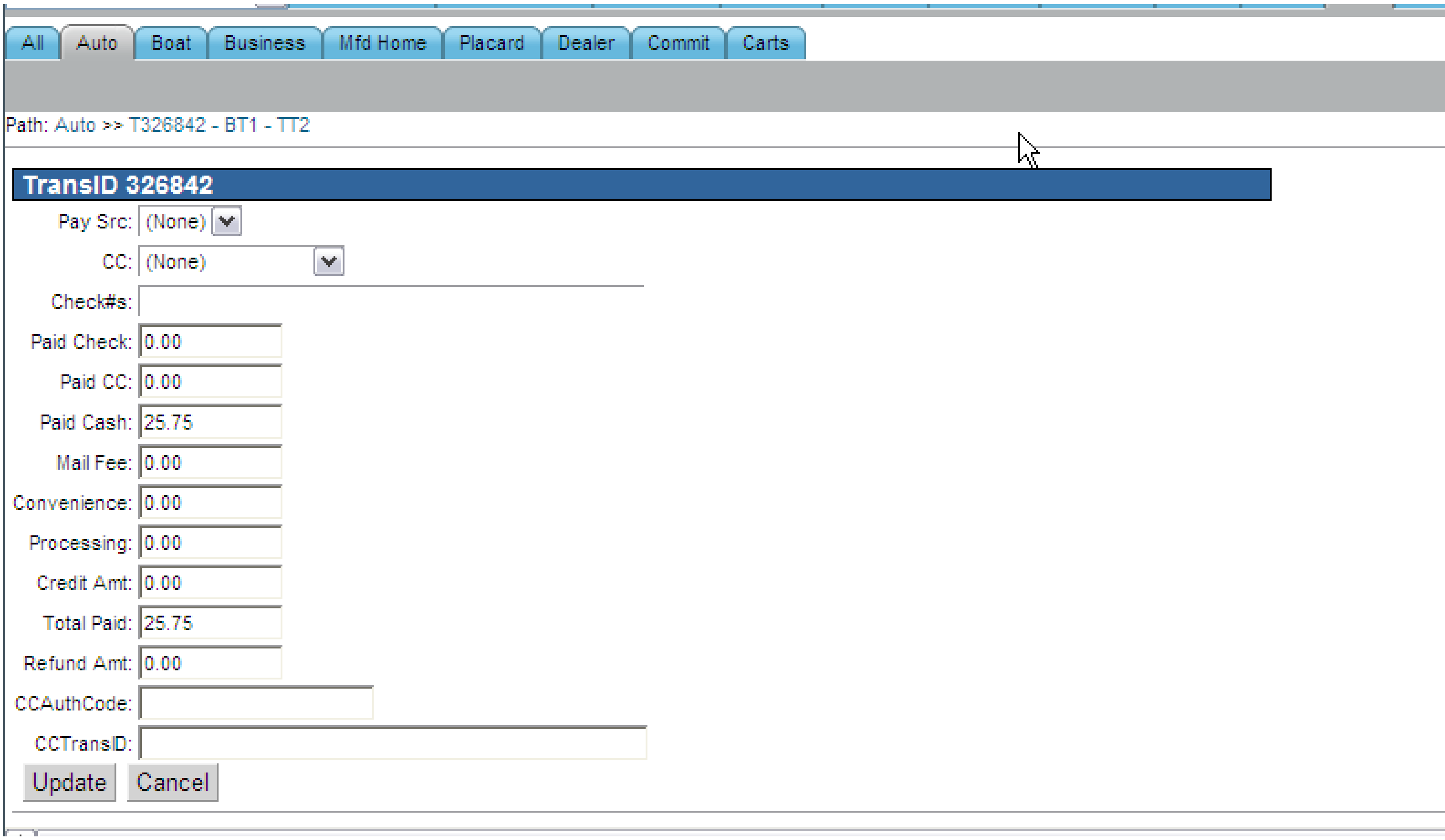


The only item that the supervisors are able to edit after the transaction date is the tag number.



Payment

Under the 'Payment' selection on the Transaction menu, the clerk is able to view the payment information for a particular transaction or a group of transactions. Any information under the 'Payment' can be edited by a supervisor on the day that the transaction was completed.

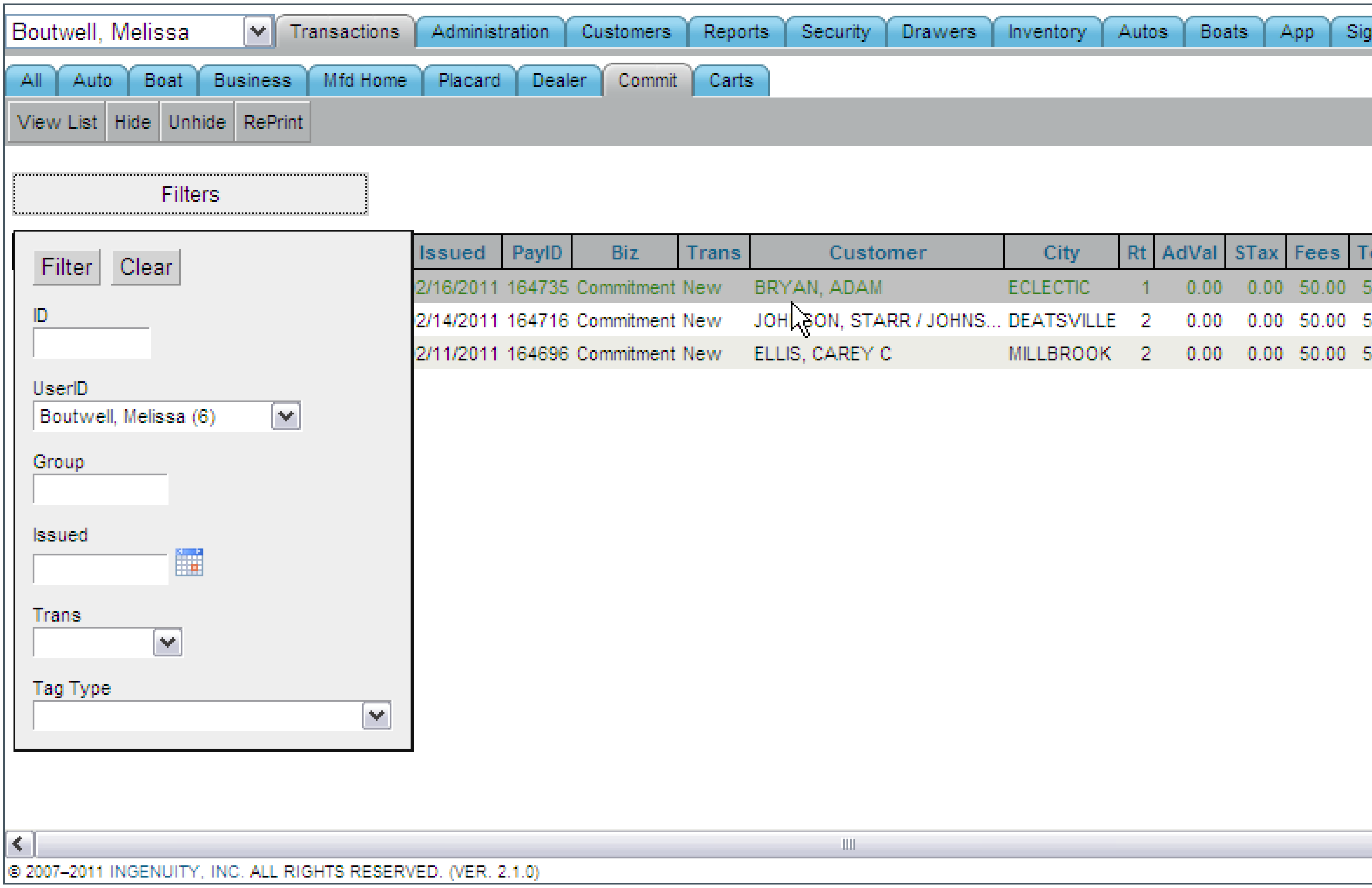


The supervisors are unable to edit the payment information after the original transaction date.

Commit Tab

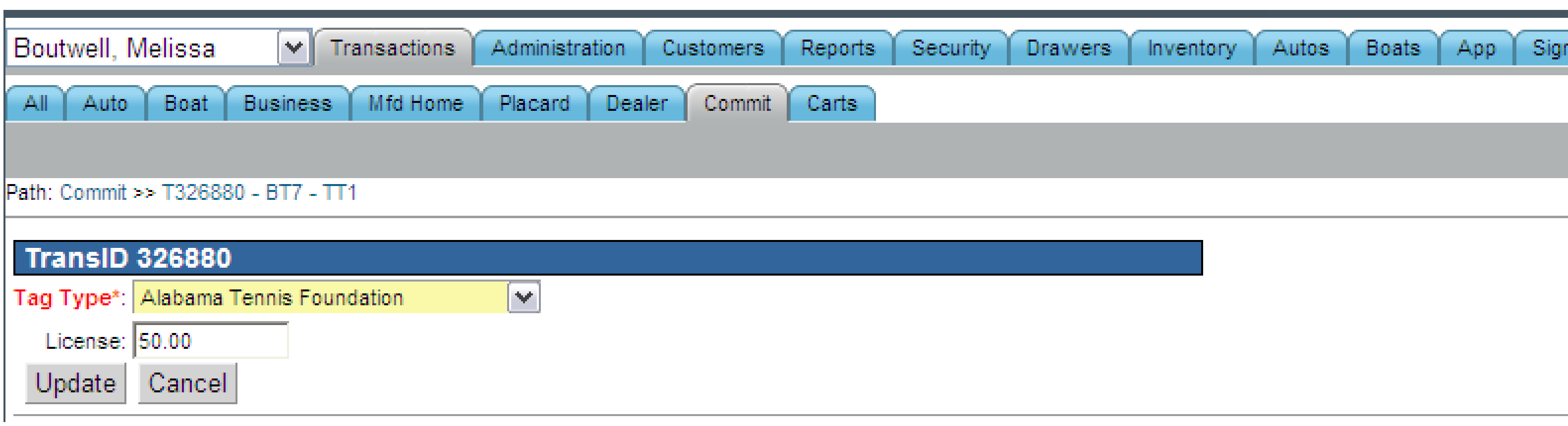
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.



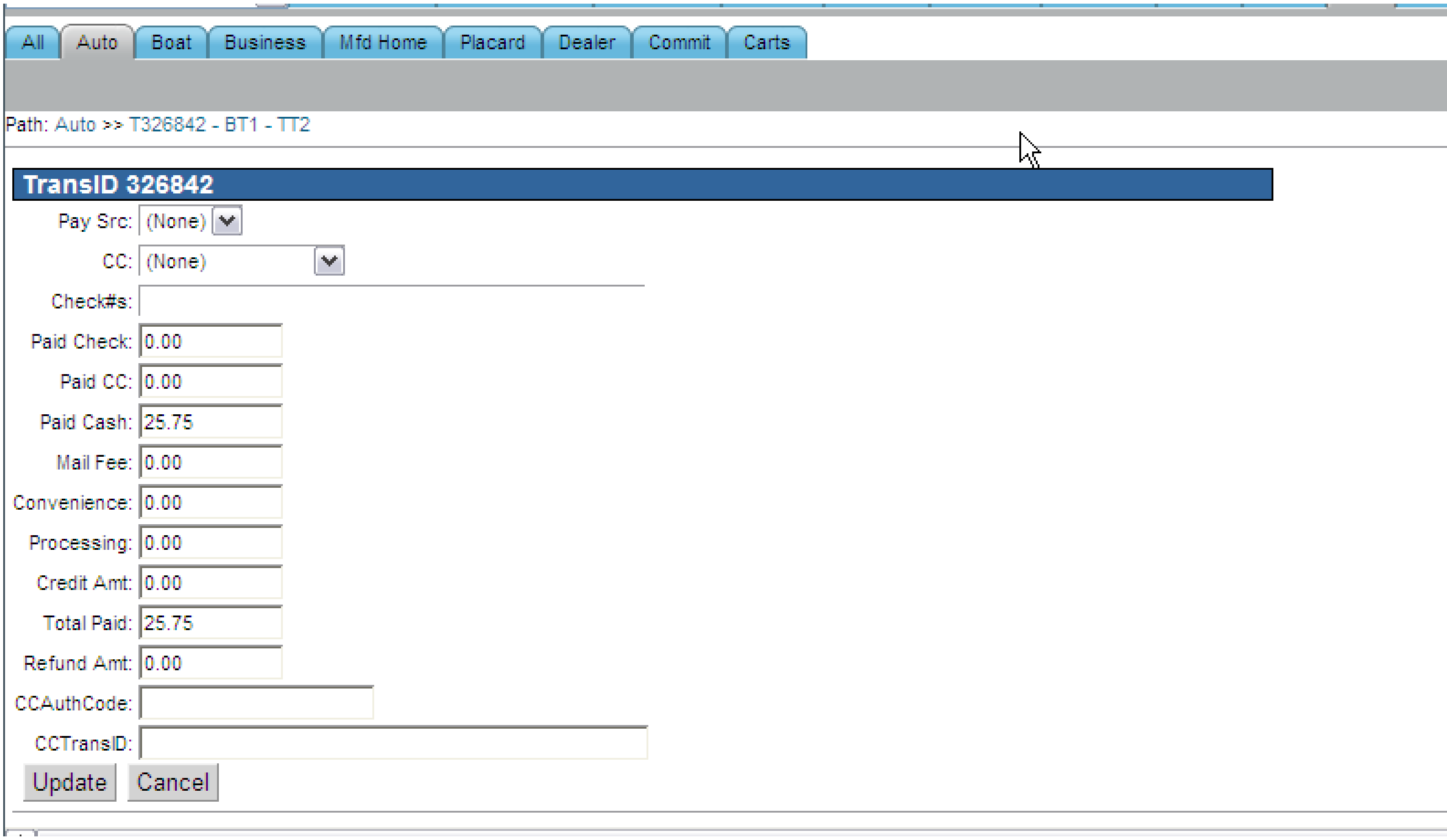
Commitment Trans

Under the 'Commitment Trans' selection on the Transaction menu the clerk is able to view the tag type and the license fee for the commitment transaction. Any information under the 'Commitment Trans' can be edited by a supervisor on the day the transaction completed.



Payment

Under the 'Payment' selection on the Transaction menu, the clerk is able to view the payment information for a particular transaction or a group of transactions. Any information under the 'Payment' can be edited by a supervisor on the day that the transaction was completed.



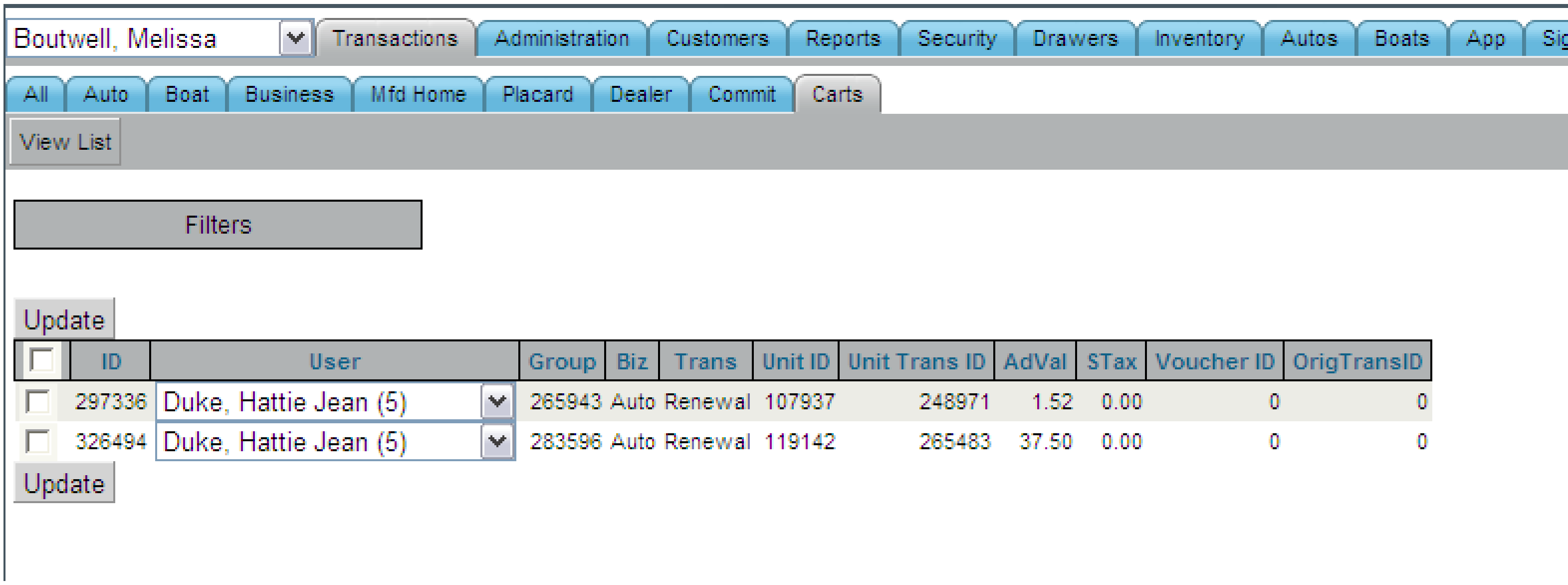
The supervisors are unable to edit the payment information after the original transaction date.

Carts Tab

The 'Carts' tab is used to move transactions from one clerks cart to another clerk’s cart.

Procedure:

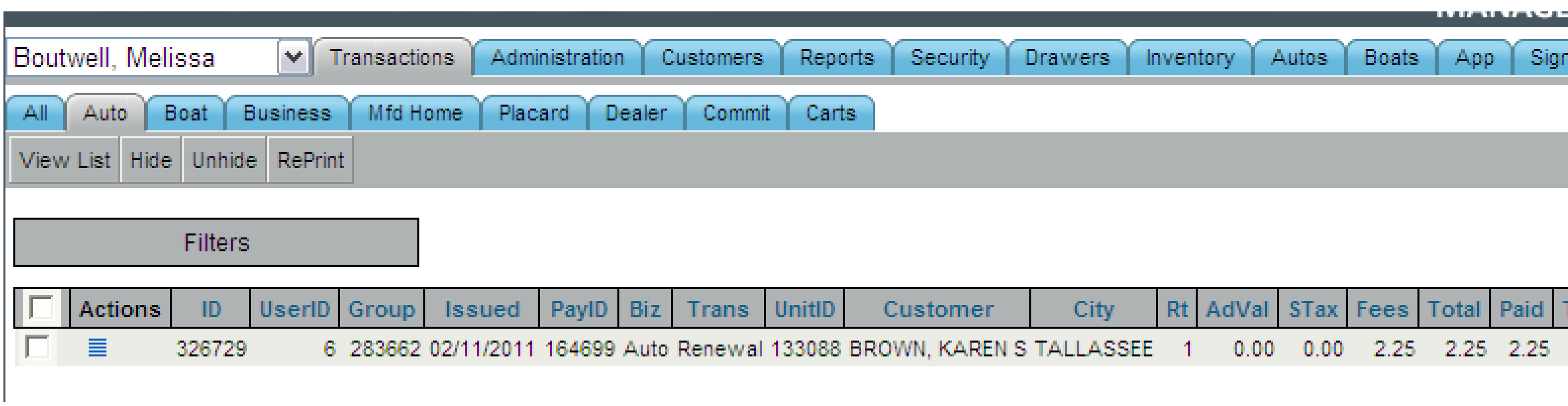
- Select the 'Filters' button
- Select the clerk who has the transaction in their cart



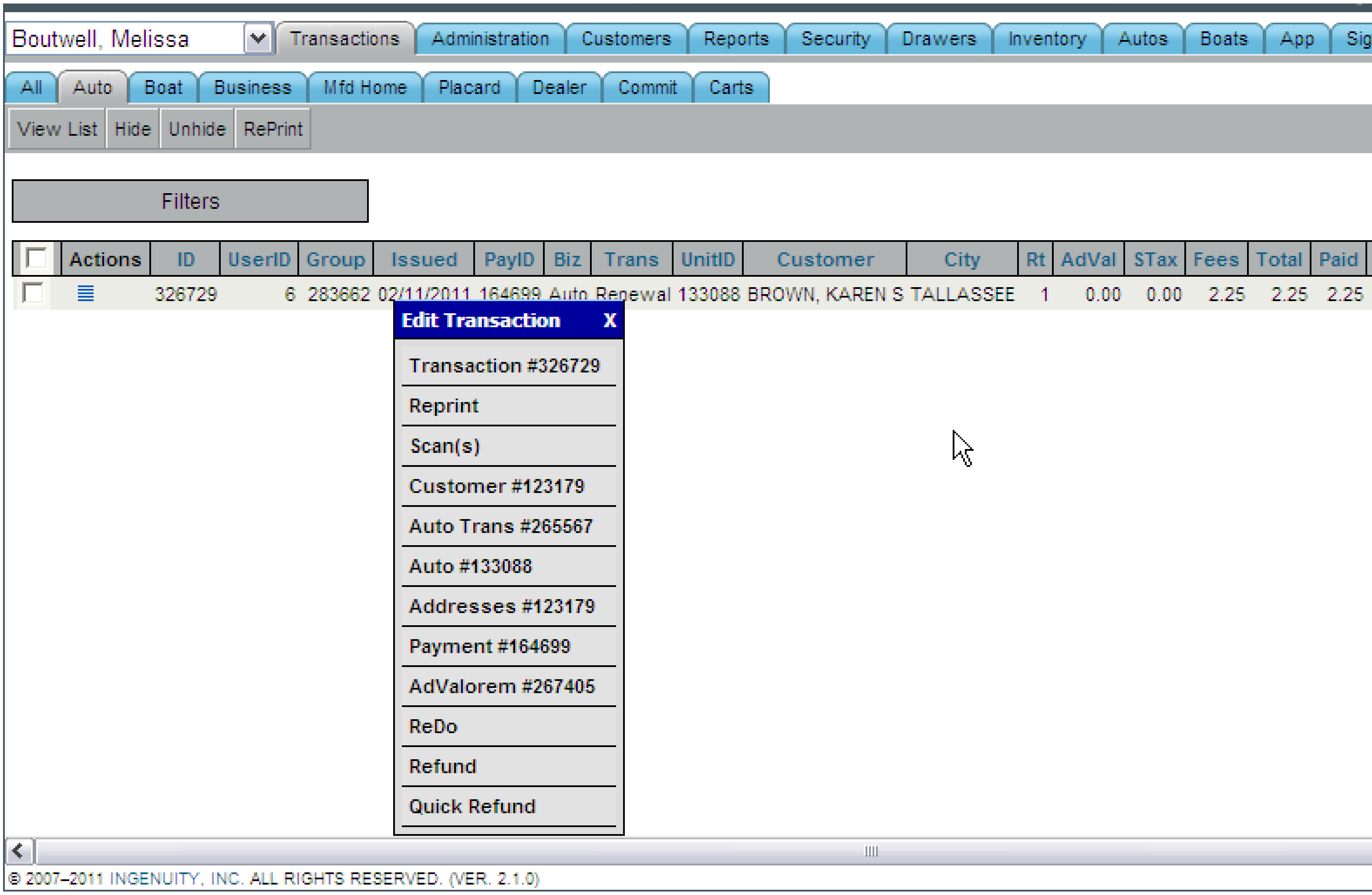
- Select the clerk in the drop down that will receive the transaction in their cart
- Select update

Refunds

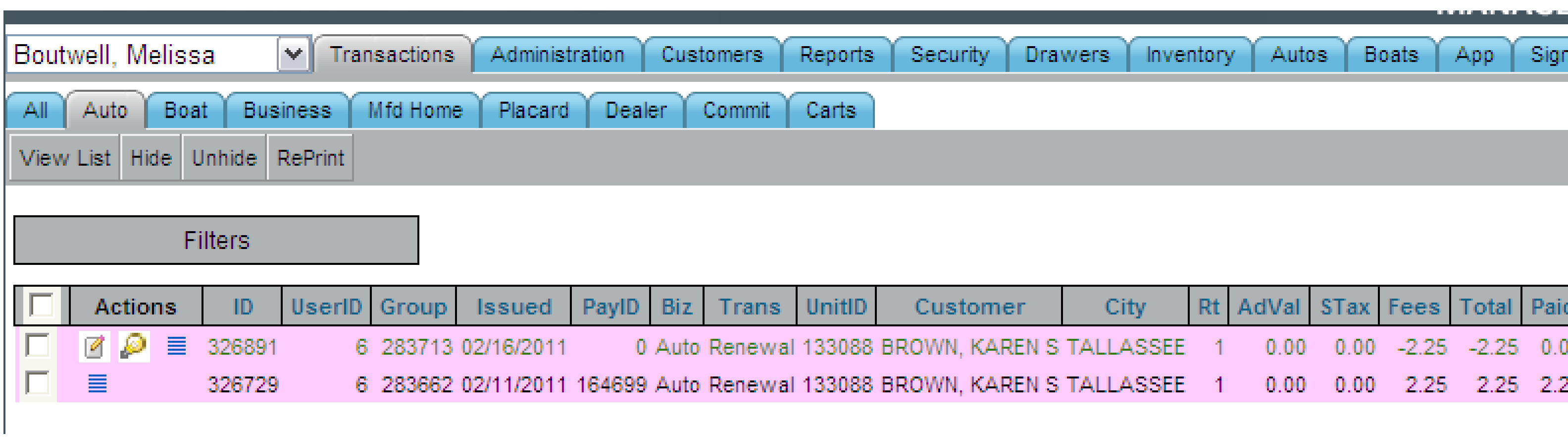
To process a refund the supervisor will need to go to the transaction tab on administration screen and search for the transaction that they would like to refund:



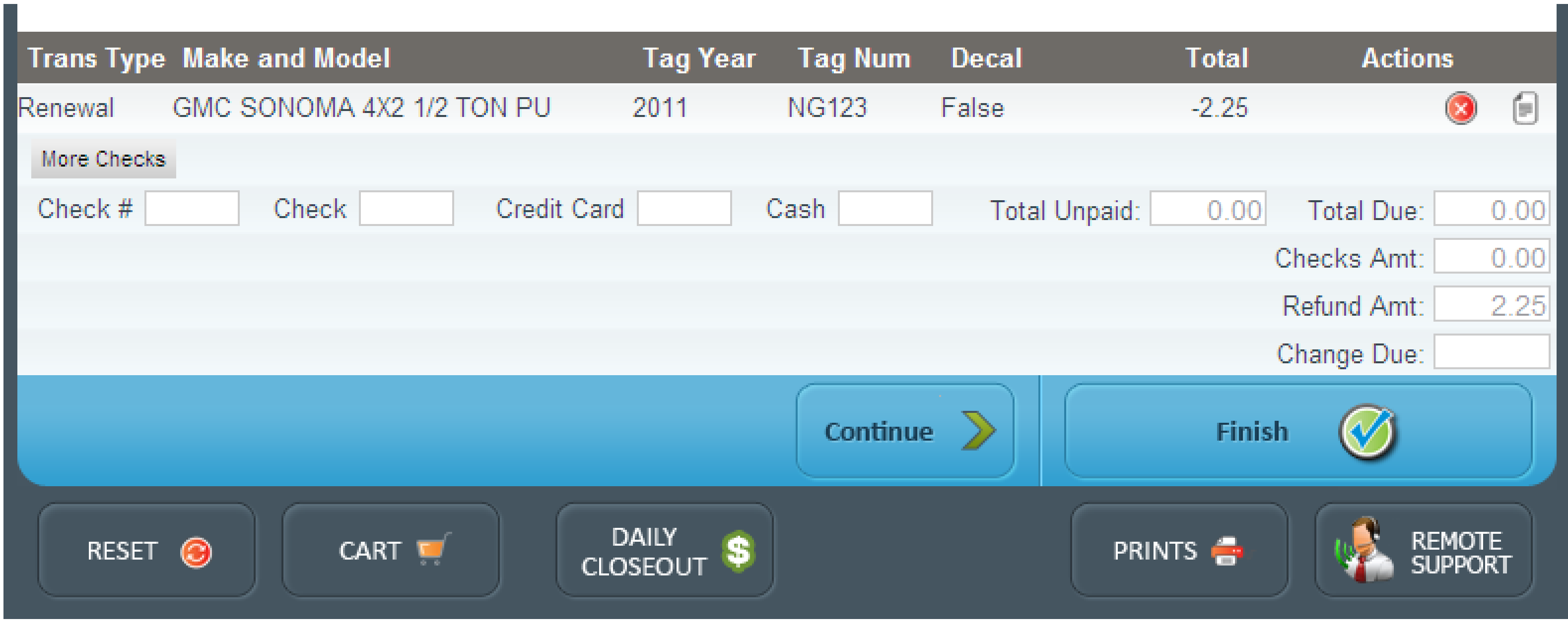
Right click the transaction and select 'Refund' from the pop up menu:



The refunded transaction will turn pink to show the user exactly which transaction has been refunded:



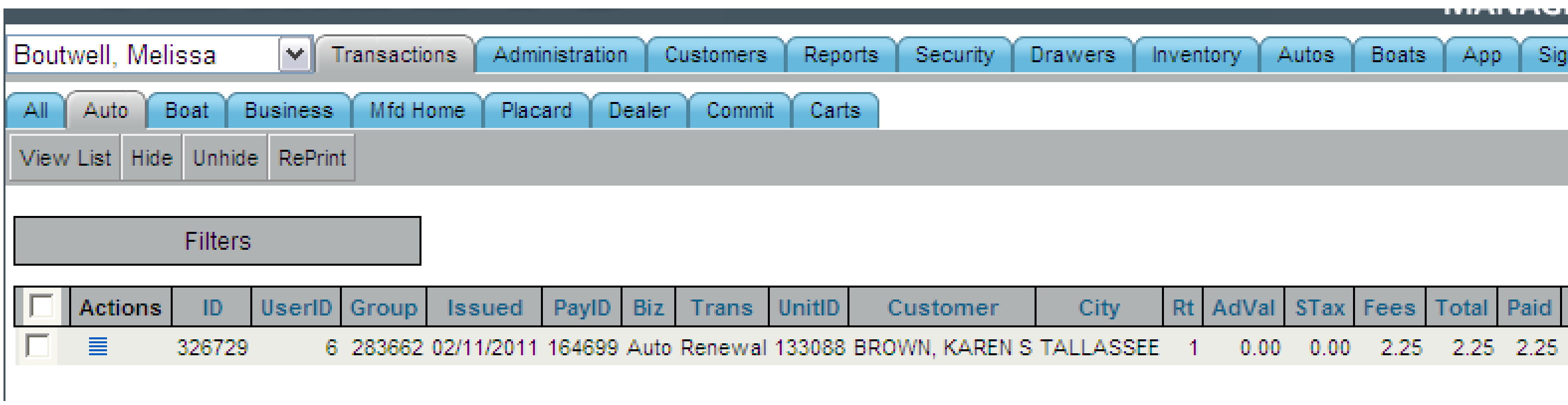
Go back to the application and select the cart button; the refund will now be in the user's cart:



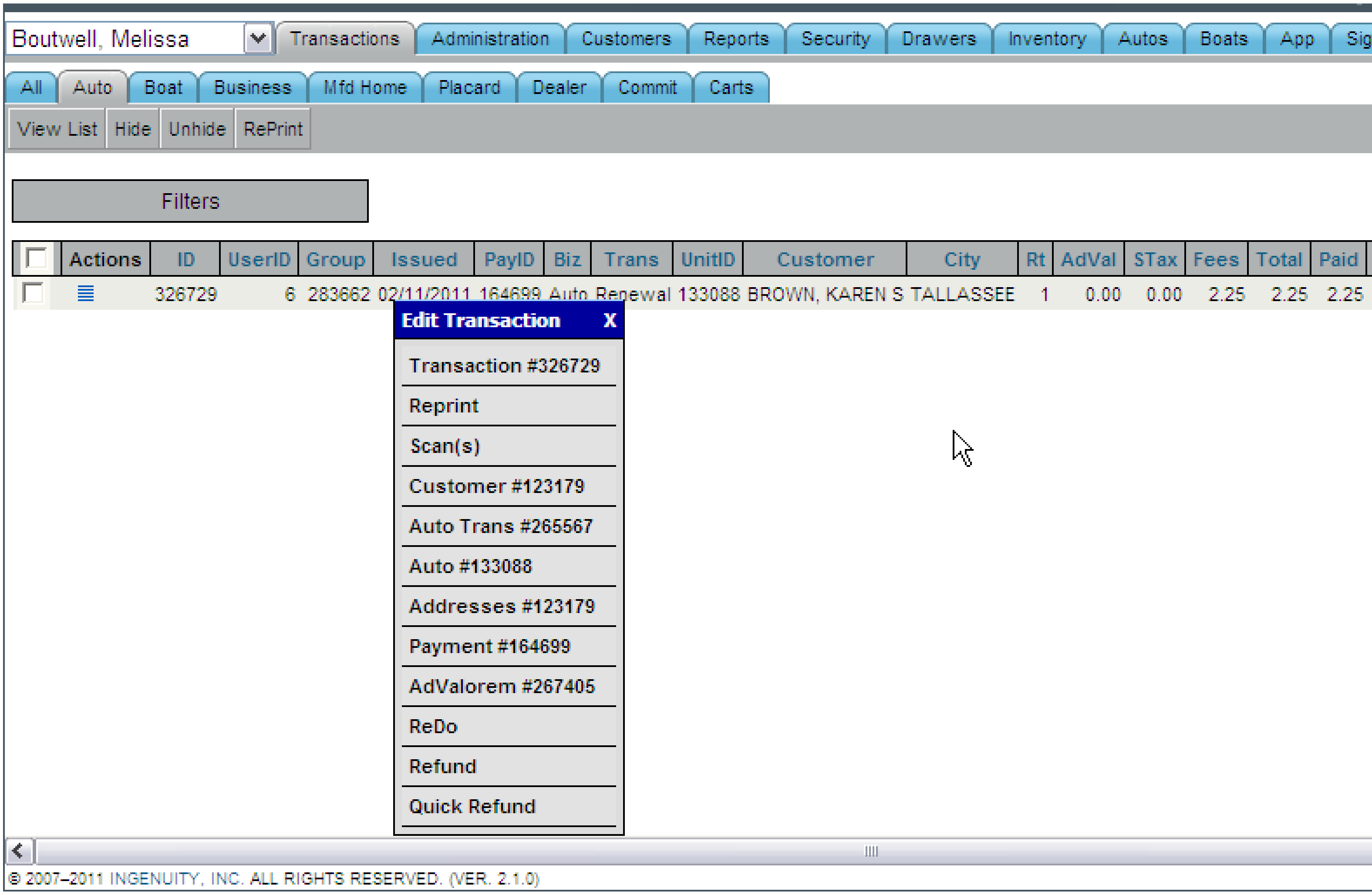
The user can complete the cart with only the refund or they can process another transaction and the refund will deduct from the total owed.

Quick Refund

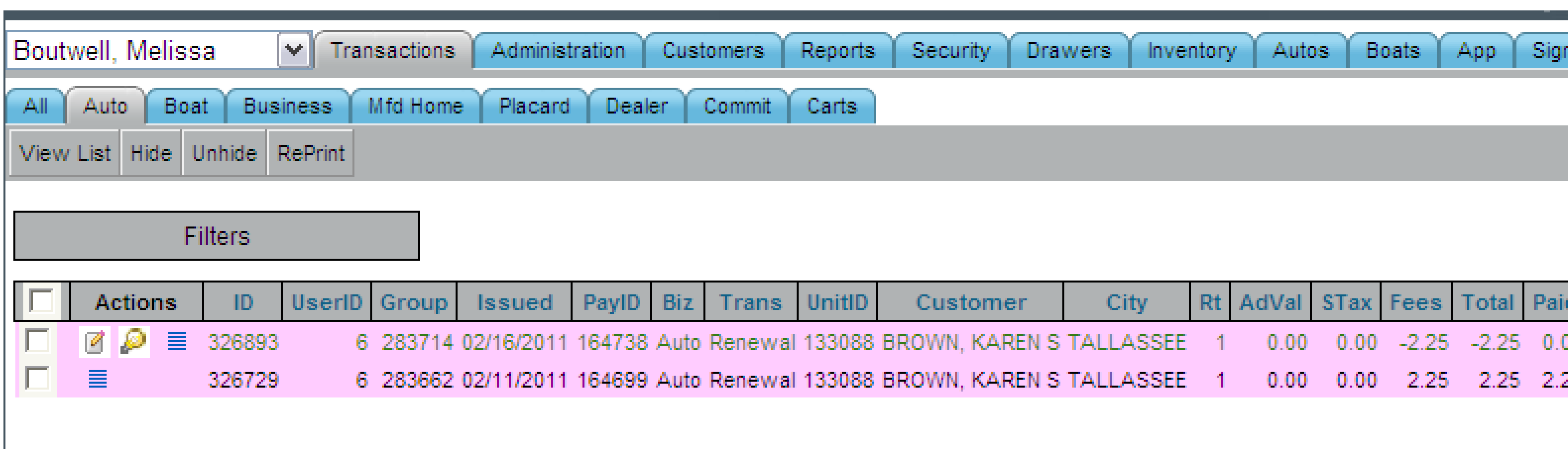
To process a quick refund the supervisor will need to go to the transaction tab on administration screen and search for the transaction that they would like to refund:



Right click the transaction and select 'Quick Refund' from the pop up menu, and the refund will automatically print:



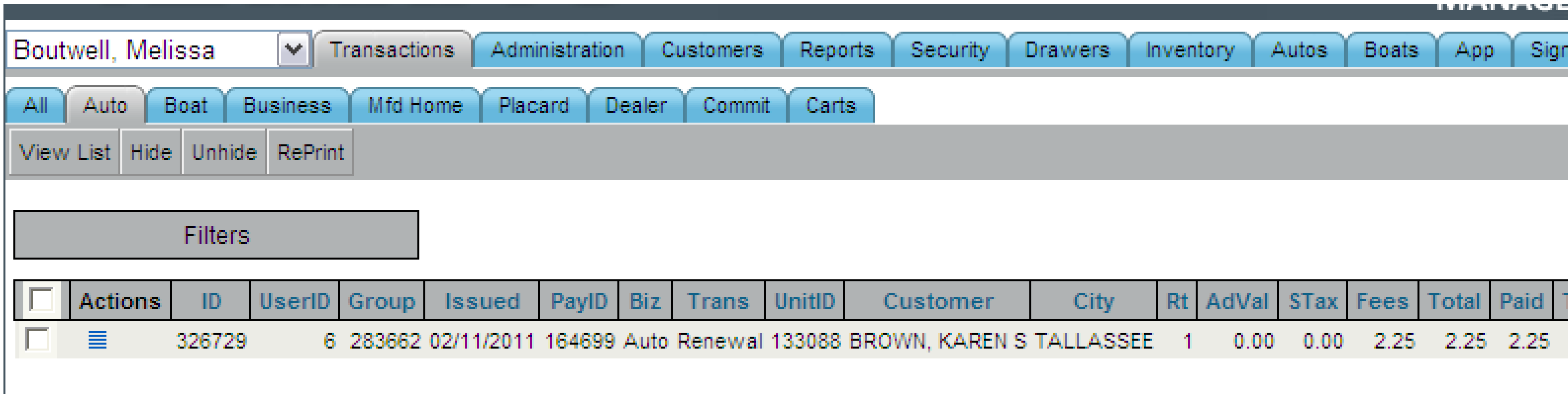
The refunded transaction will turn pink to show the user exactly which transactions have been refunded:



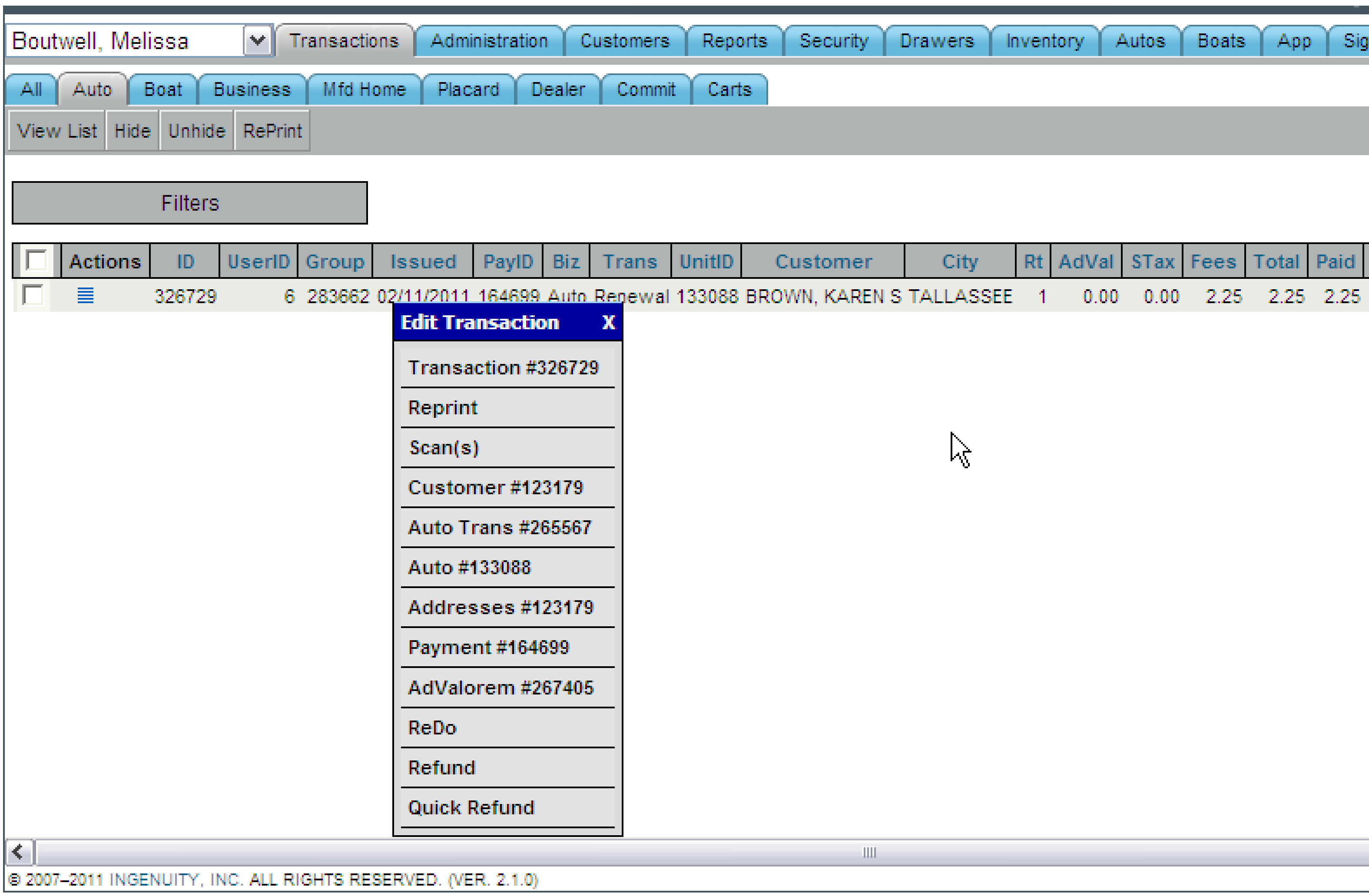
ReDo

In this transaction a National Guard tag was marked as the first tag given, when it was not. So, we want to collect the additional $17.25 that was not collected during the original transaction.

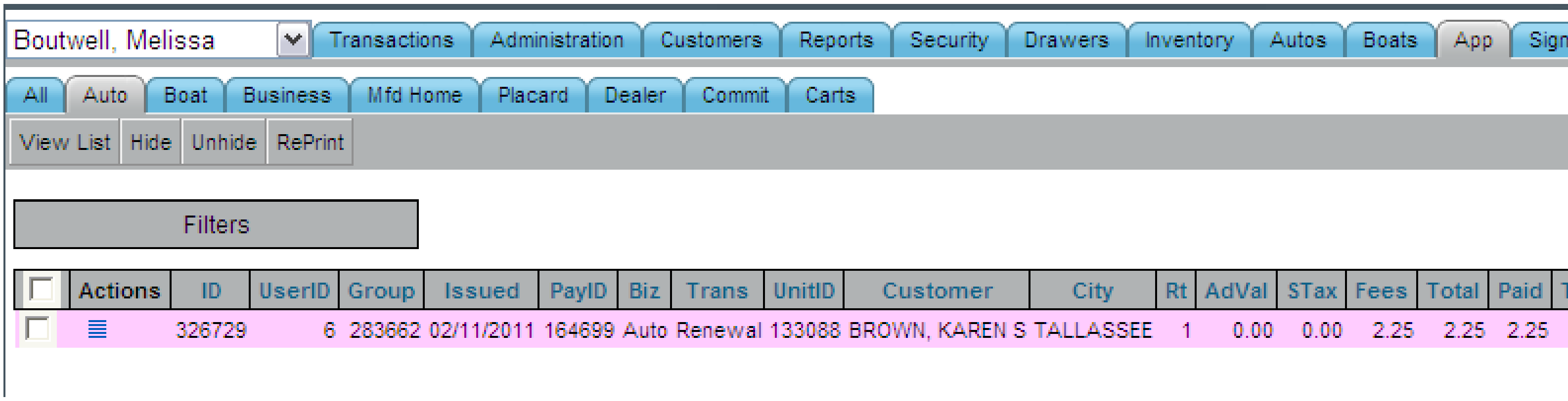
To process a ReDo the supervisor will need to go to the transaction tab on administration screen and search for the transaction that they would like to Redo:



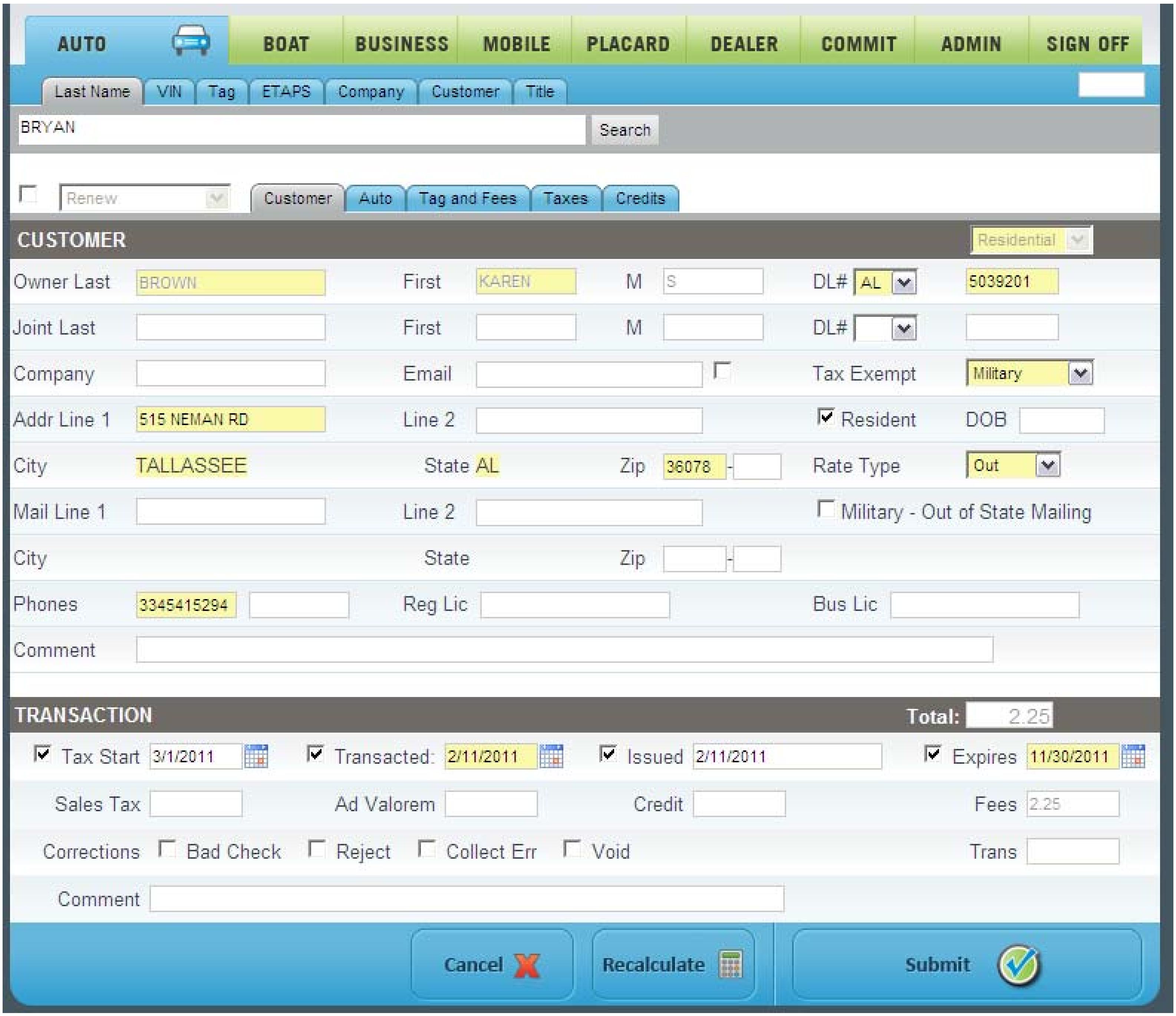
Right click the transaction and select 'ReDo' from the pop up menu:



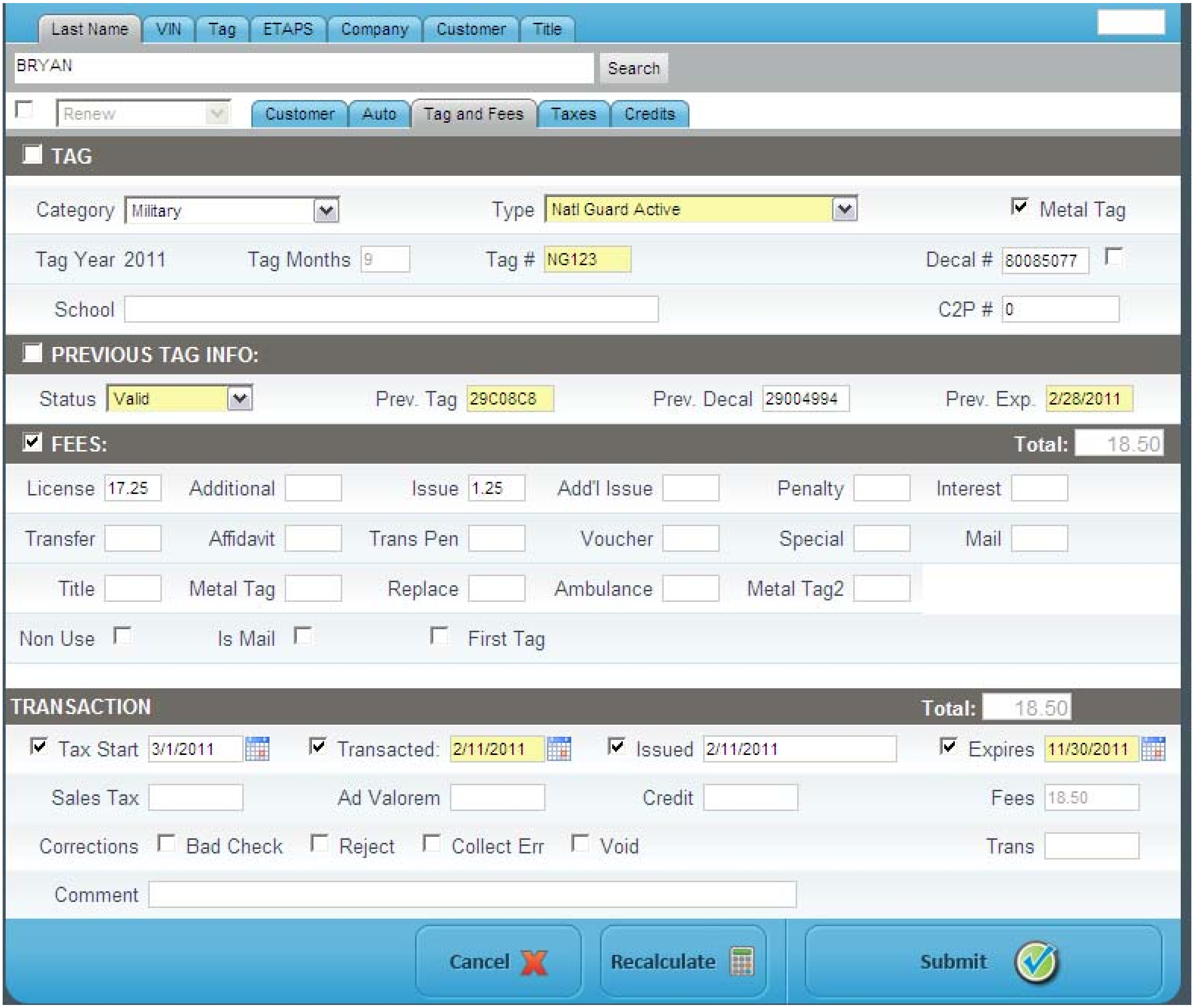
The selected transaction will turn pink to show the user exactly which transactions have been redone:



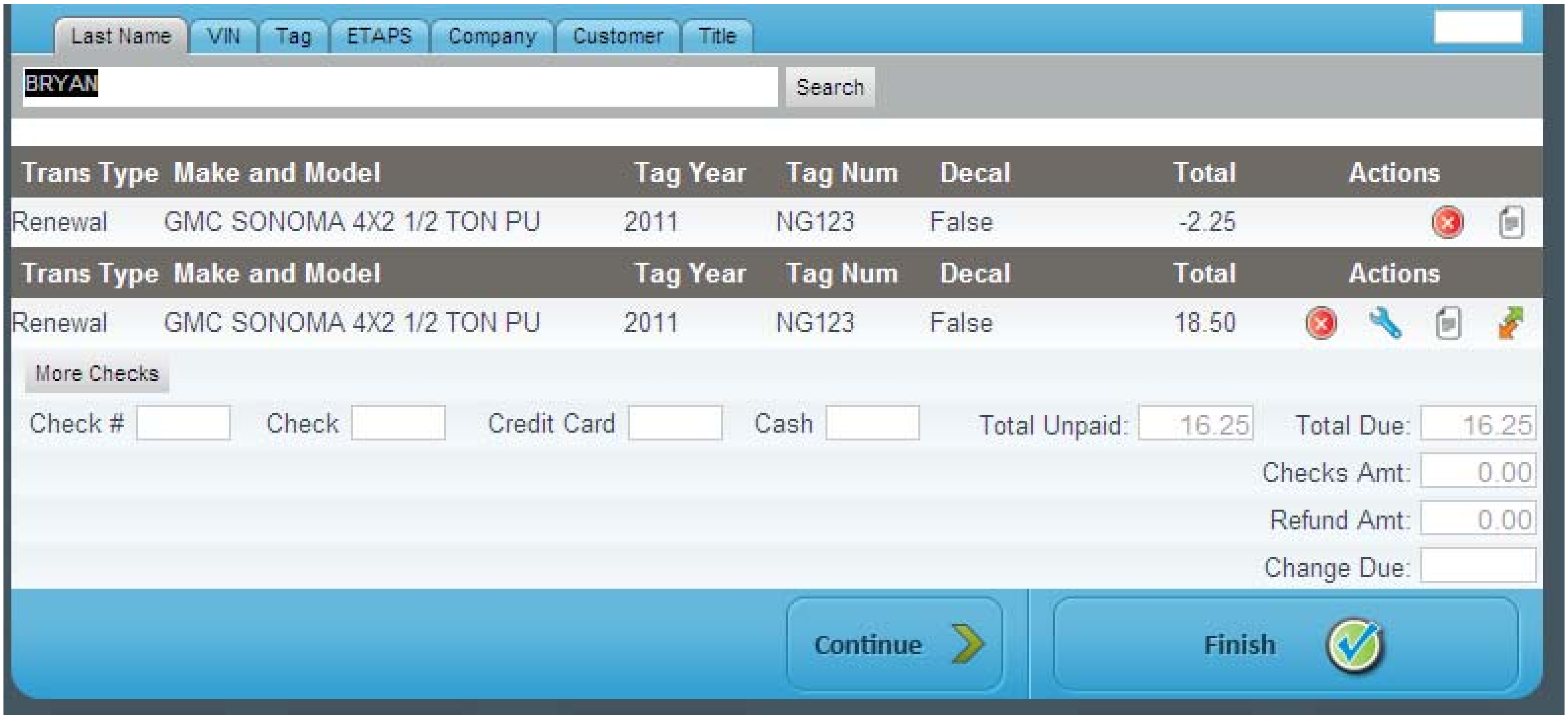
Go to the application and select the 'Auto' button at the top of the page. All of that transactions data will be uploaded:



Uncheck the 'First Tag' check box and you will see the $17.25 license fee added:



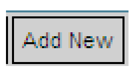
Submit the transaction to the cart, and you will see the original transaction -$2.25 and the corrected transaction for $18.50. When they are added together you will get a total of $16.25 owed, which was the amount of the corrected license fee.



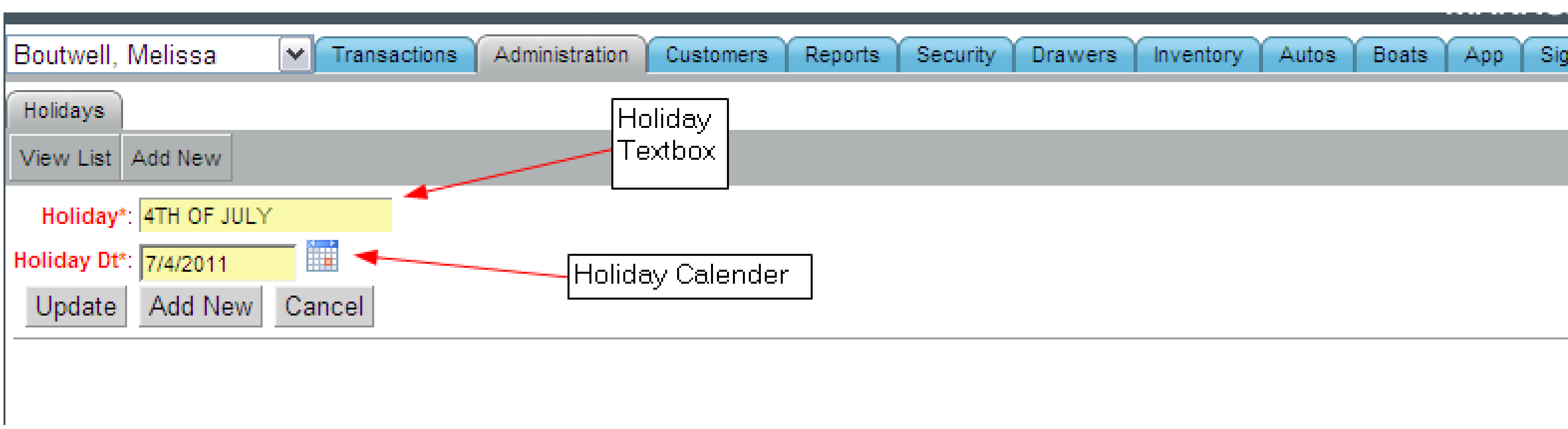
Administration Tab

Under the 'Administration' tab the supervisors are able to add any holidays that their county takes off.

Add Holidays

- Select the 'Add New' button 

- Enter the holiday into the 'Holiday' textbox
- Enter the date into the 'Holiday Dt' textbox
- Select the 'Add' button

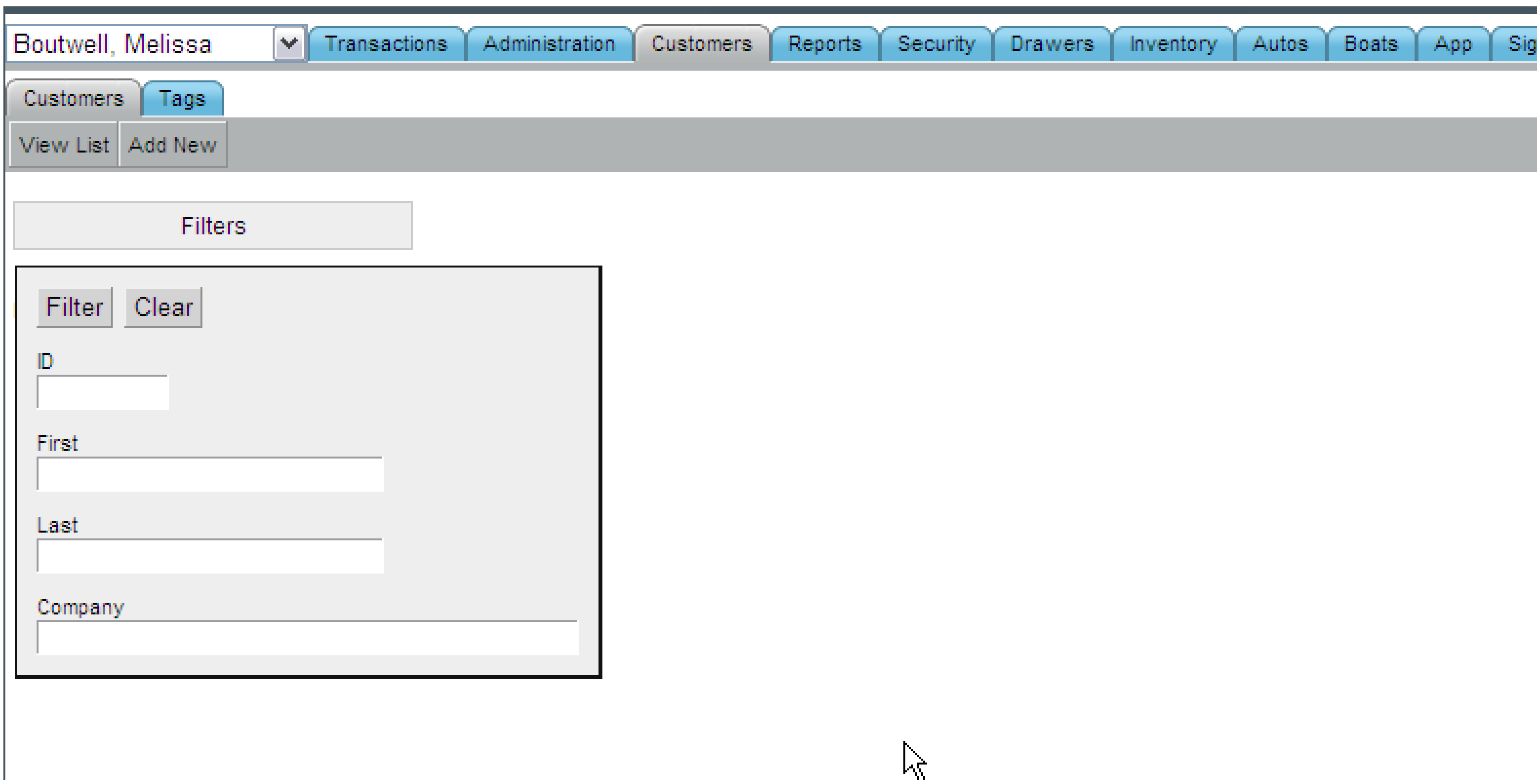


Customers Tab

Under the 'Customers' tab a clerk is able to view and edit a customer’s information. This includes their address, automobiles, and boats. A supervisor is able to lock customers, boats, and automobiles from under this tab. They can also add an address to a customer's record.

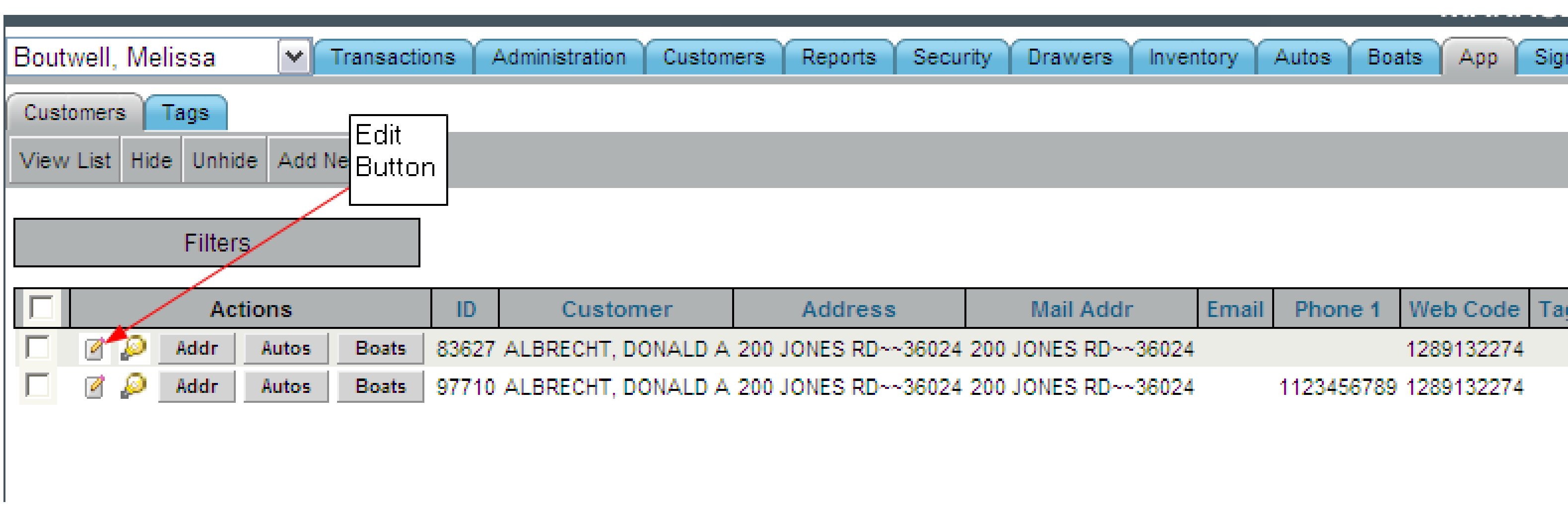
Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk should enter in their search parameters.

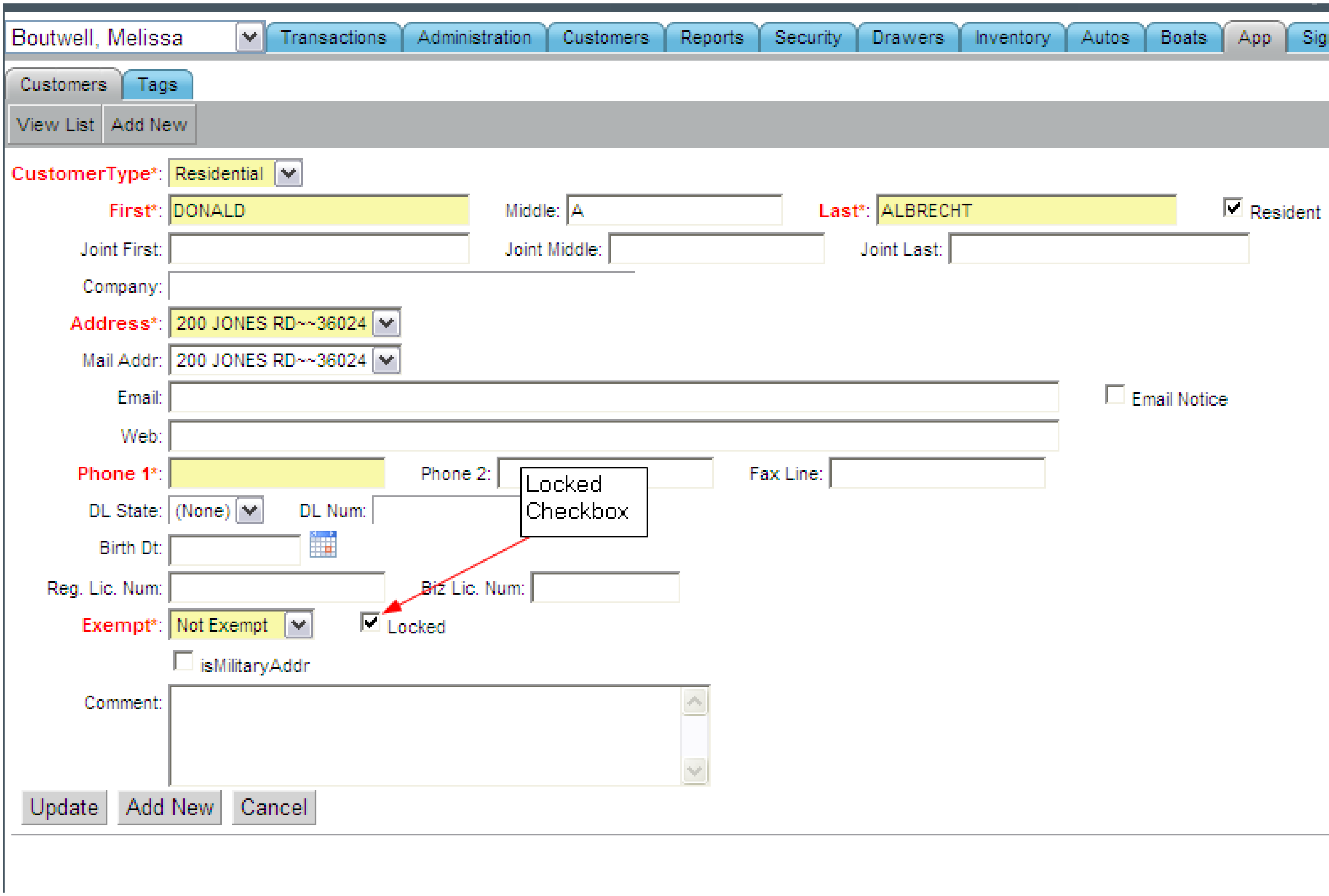


Customer Lock

Filter by the customer you would like to lock, and select the edit icon



Select the "Locked" checkbox at the bottom of the page and select update.

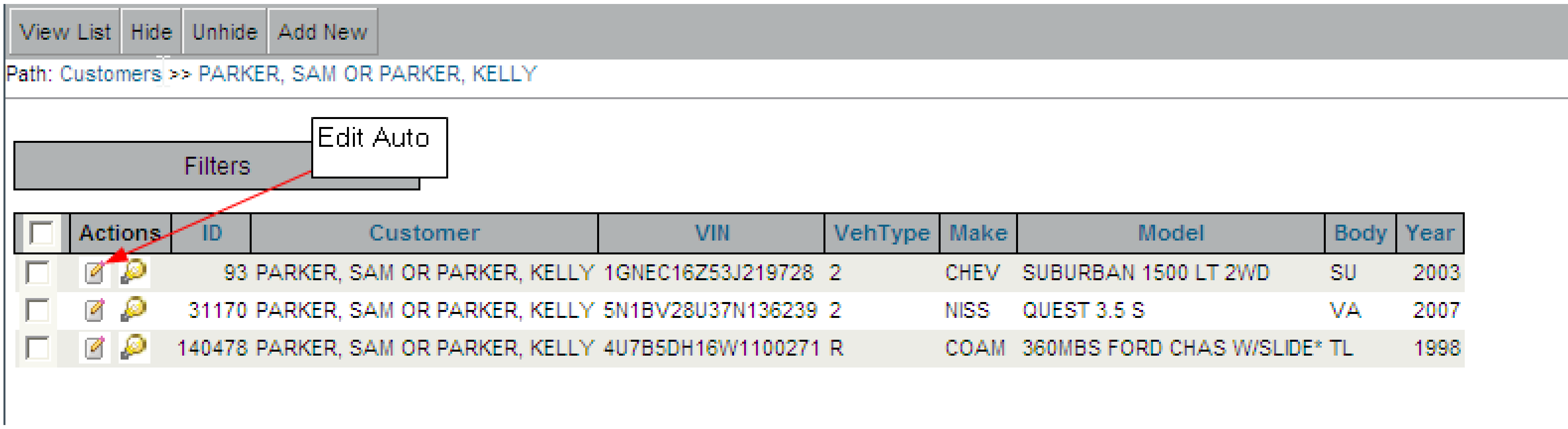


When the customer is selected in the application a red error will display at the top of the page, "Customer is Locked".

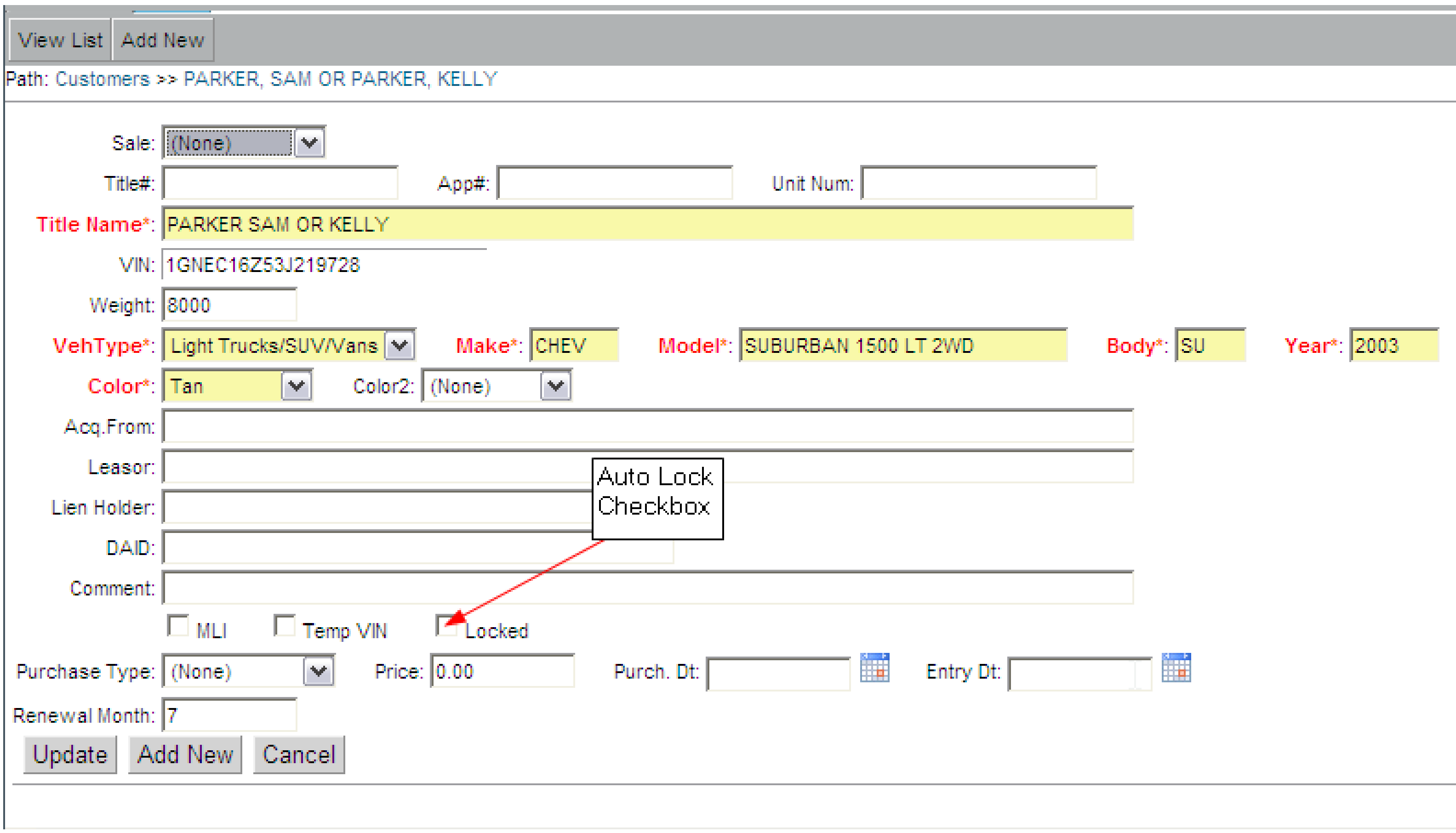
Auto Lock

The auto lock function of the application is used to prevent any transactions from taking place for a specific auto.

- Go to the customer tab and search for the automobile owner
- Select the 'Autos' button next to the customer's name
- Edit the auto that needs to be locked



- **Select** the Locked check box and Update

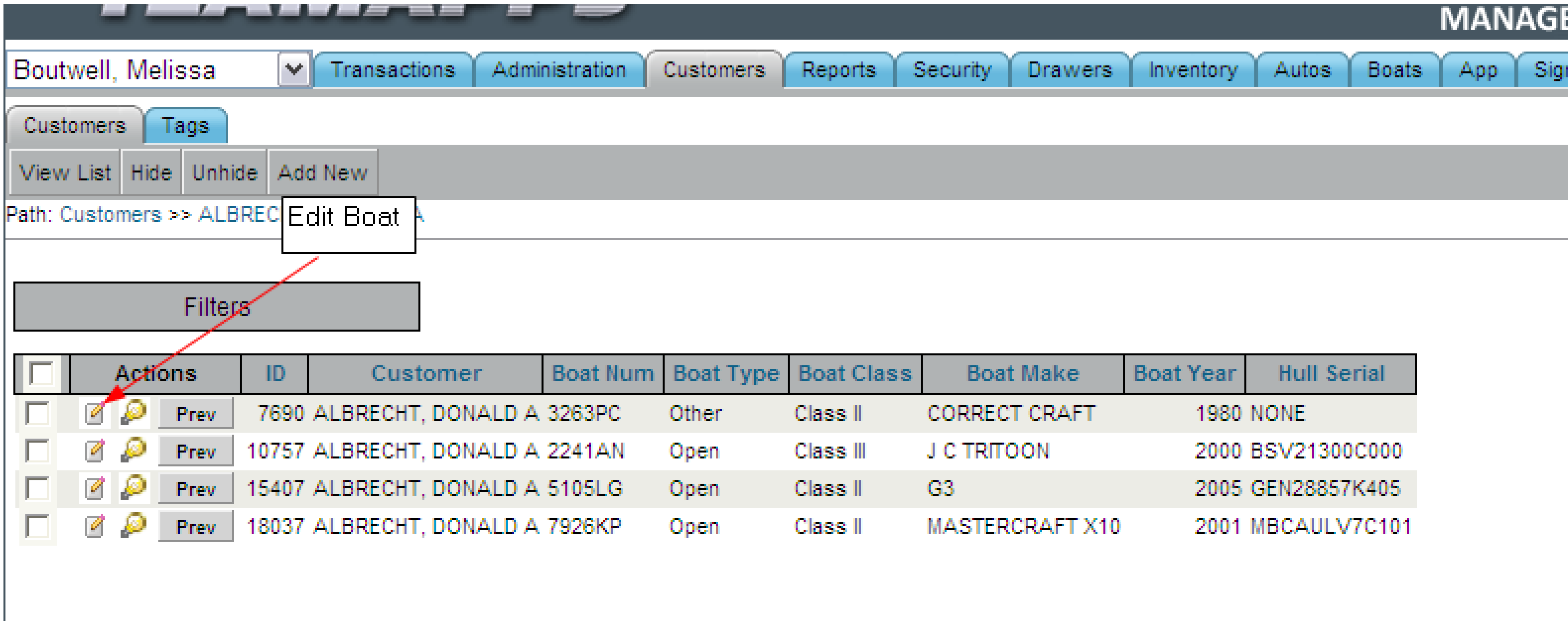


- If the boat is selected in the application the error message "Auto Lock" will appear and not allow the transaction to be completed
- To unlock a automobile uncheck the Locked checkbox

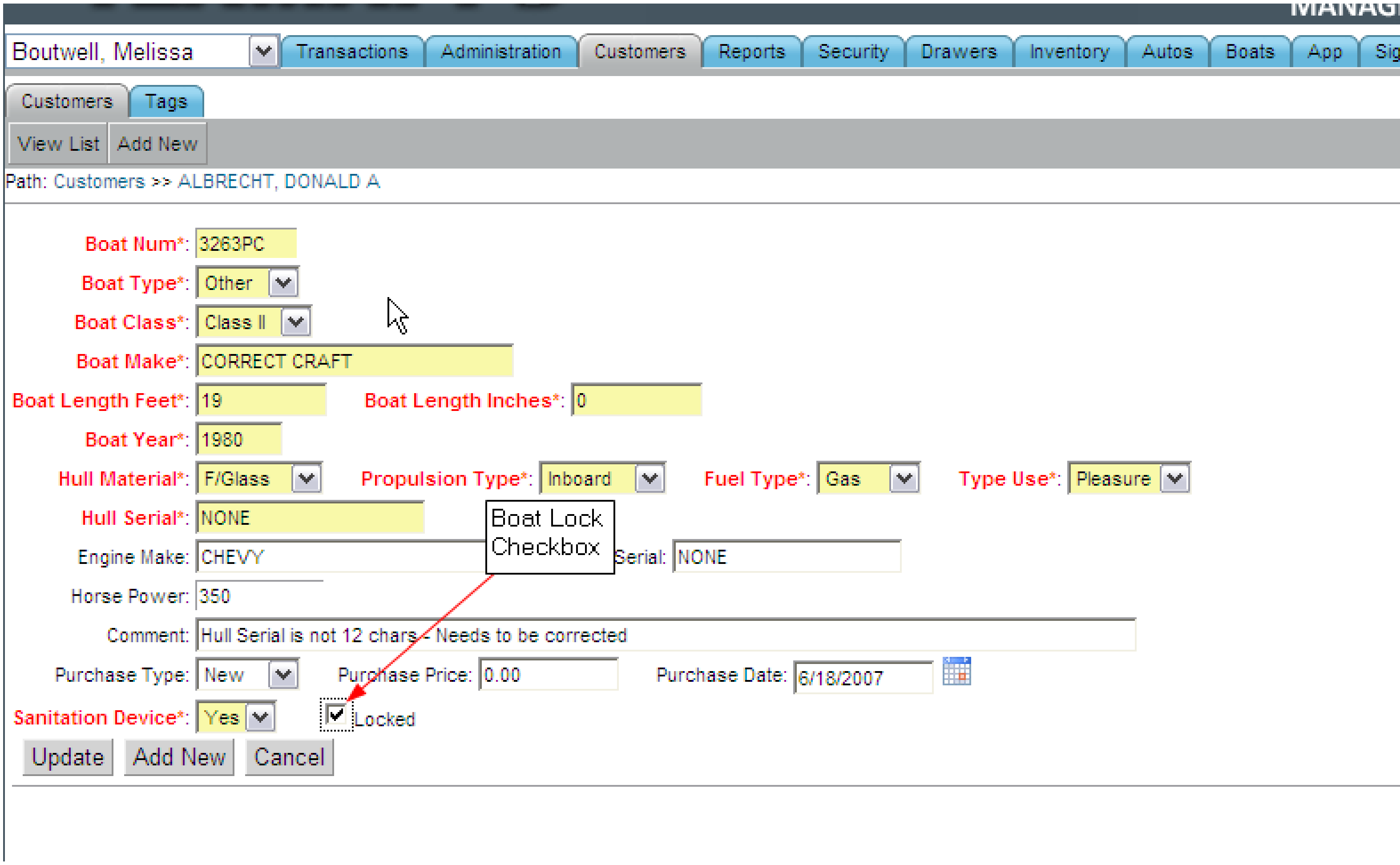
Boat Lock

The boat lock function of the application is used to prevent any transactions from taking place for a specific boat.

- Go to the customer tab and search for the boats owner
- Select the 'Boats' button next to the customer's name
- Edit the boat that needs to be locked



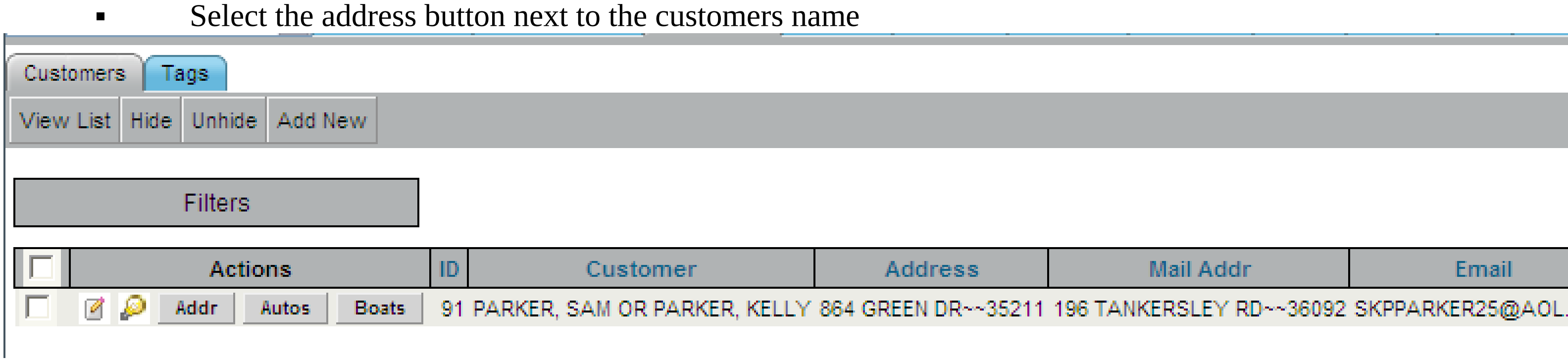
- Select the Locked check box and Update



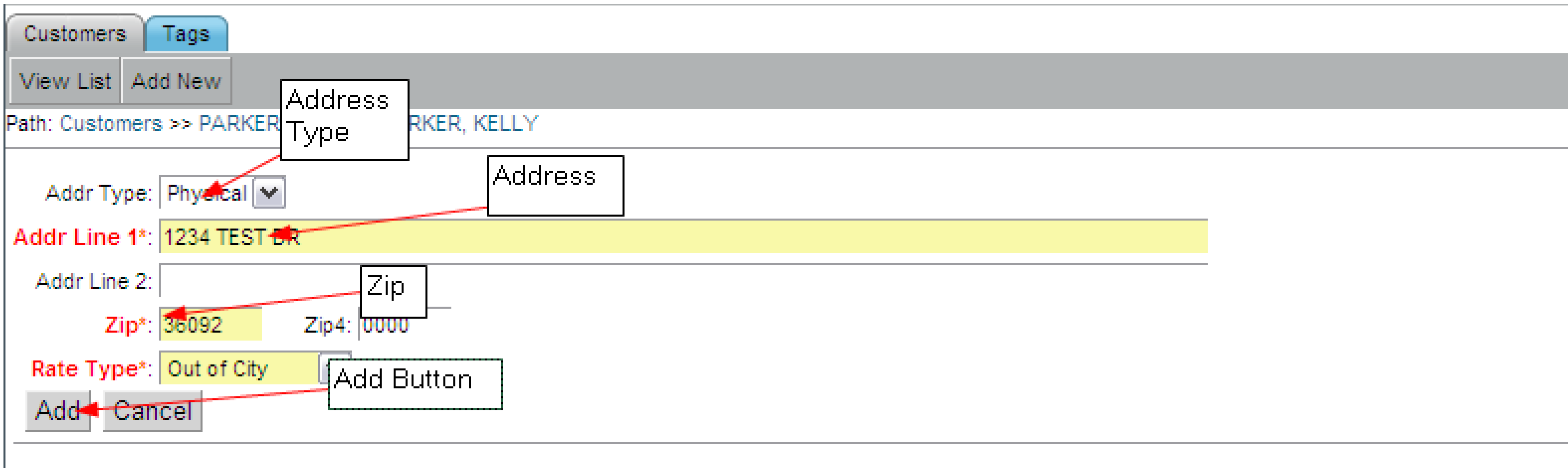
- If the boat is selected in the application the error message "Boat Lock" will appear and not allow the transaction to be completed
- To unlock a boat uncheck the Locked checkbox

Add Address

- Search for the customer that needs an address added
- Select the address button next to the customers name



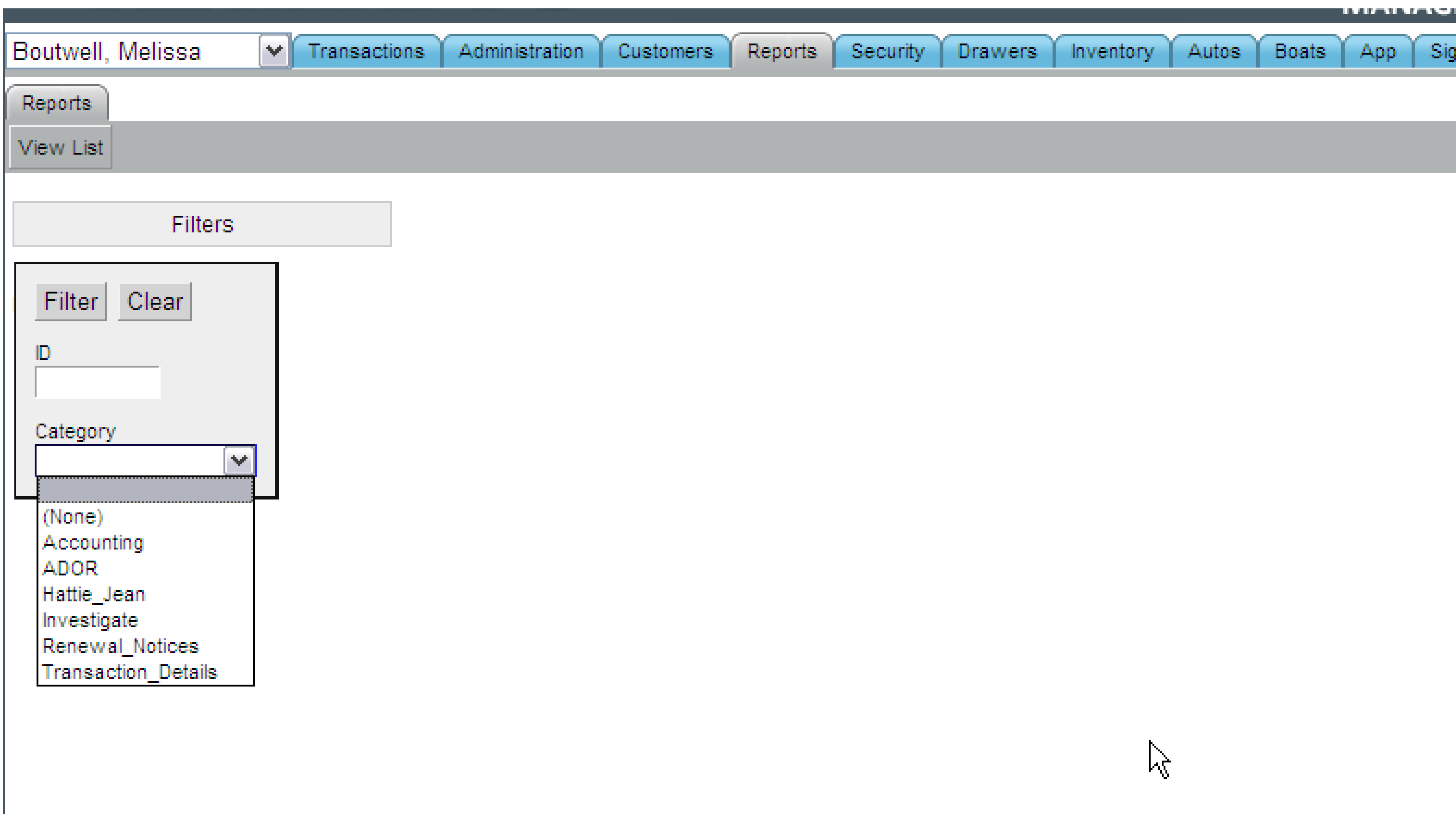
- Select the 'Add New' button
- Add the Customers new address



Reports Tab

Filter Menu

The 'Filters' button will present a drop down menu when selected. This menu is where the clerk should enter in the category that their report is located.



Reports

Procedure:

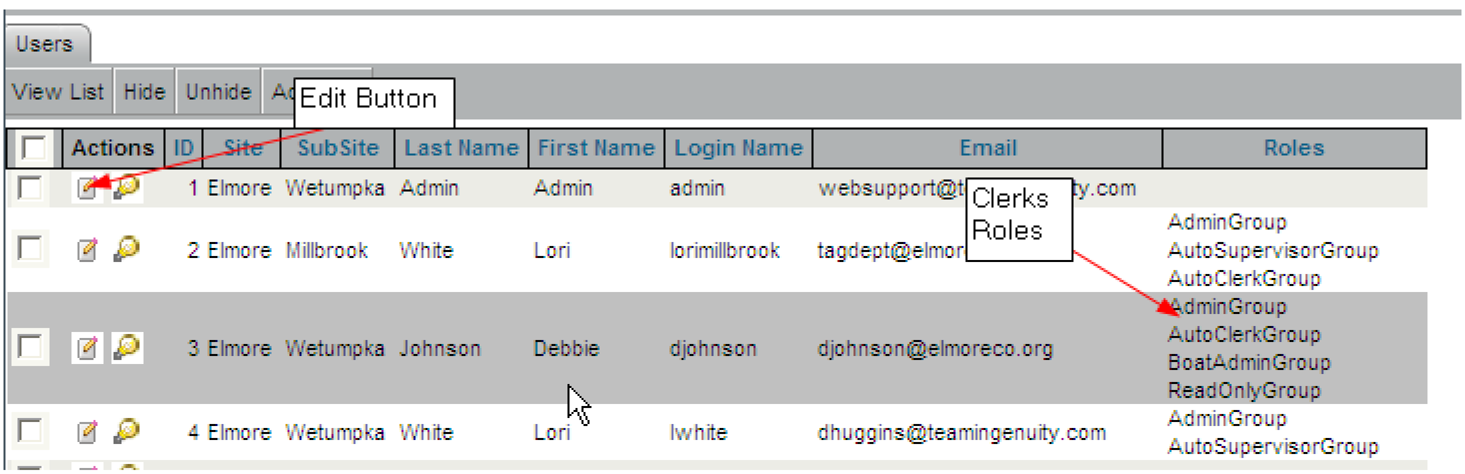
- Find the report you want to run
- Click 'Run' beside the report name
- Fill in any applicable parameters
- Click 'Run Report'
- Depending on the report, you will need to save or open the report to view it

Security Tab

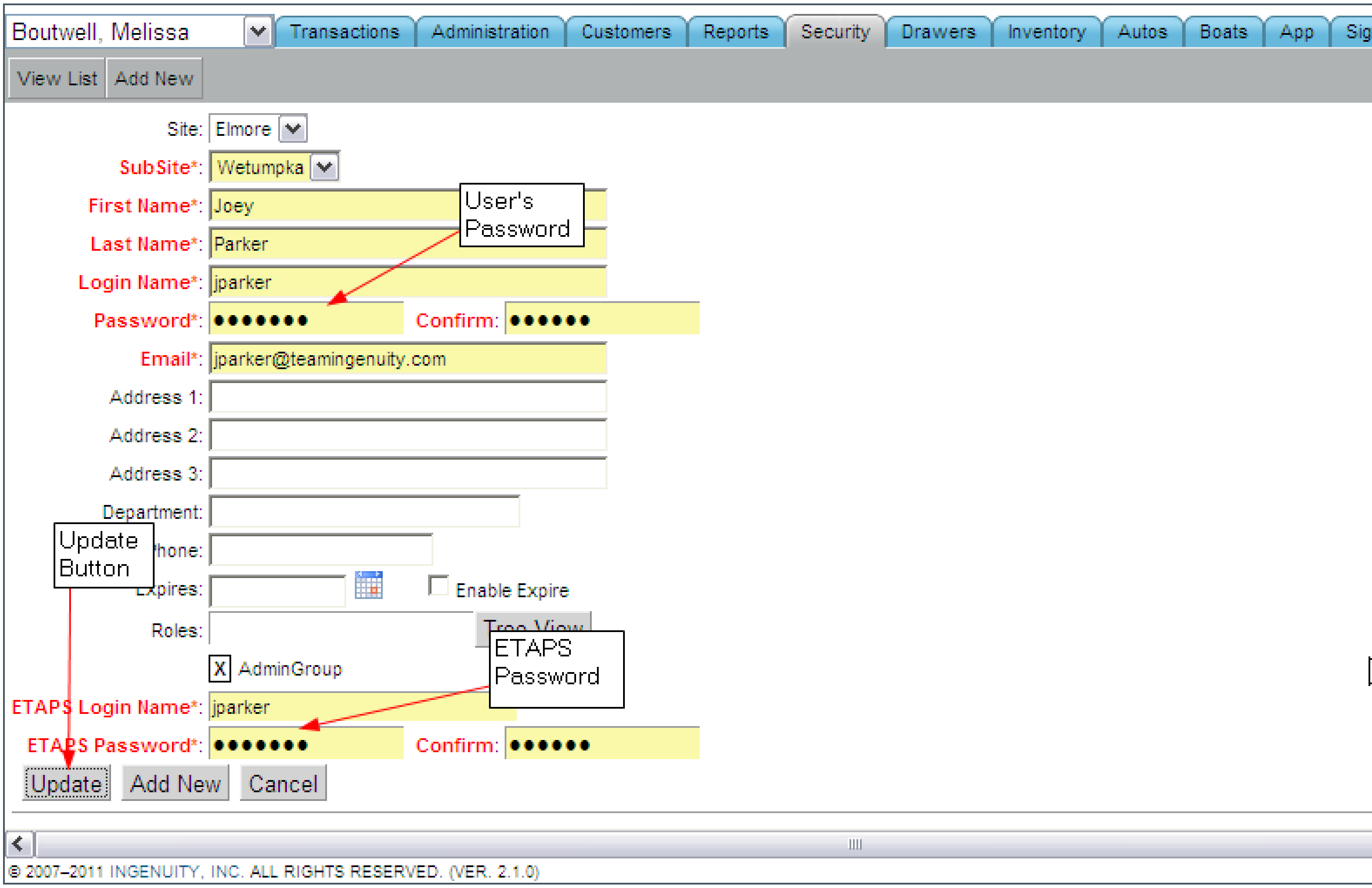
The security tab is used by the supervisors to add new users and to edit user’s information.

Change Passwords

Edit the user who needs their password changed

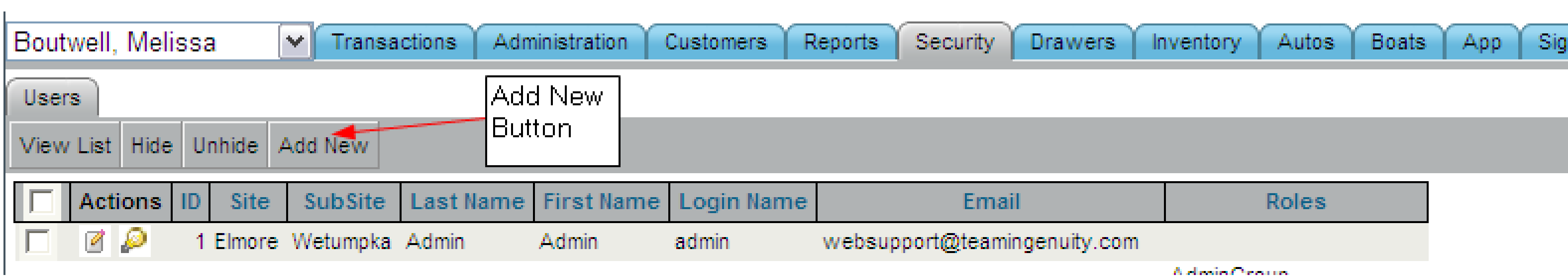


Update the user's password and select update

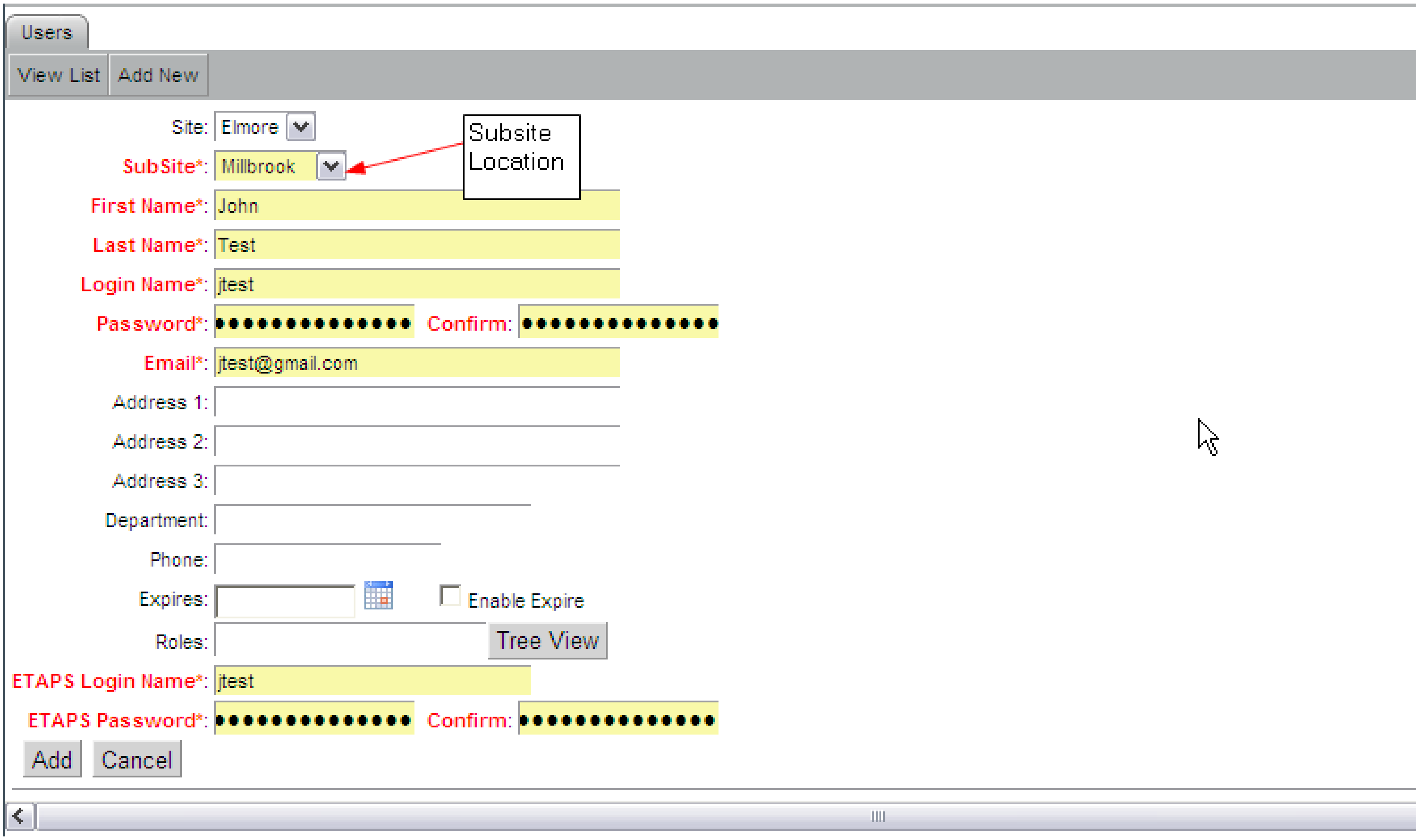


Add New User

Select the 'Add New' button



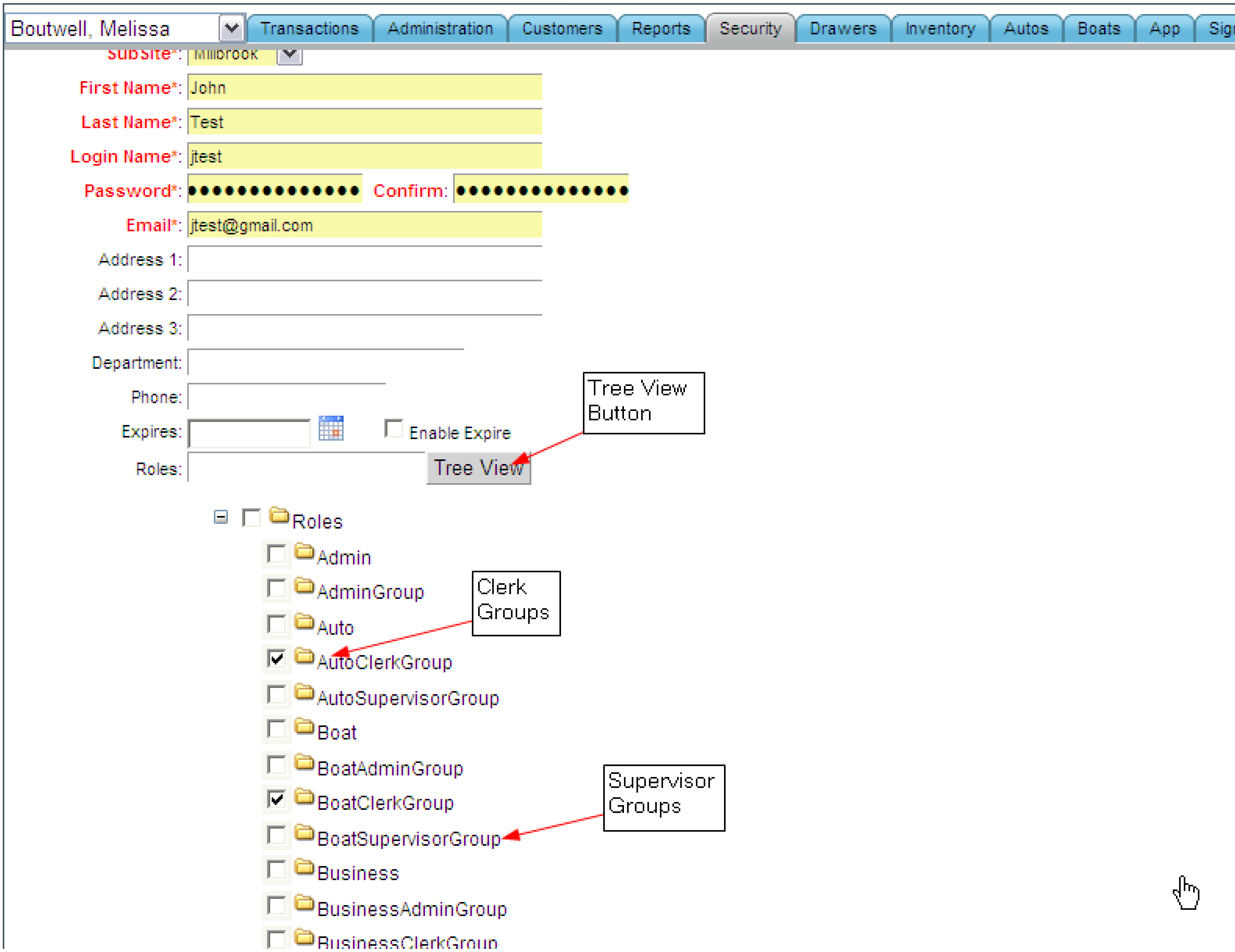
Fill out the user's information



Select the 'Tree View' button and assign the user their role. Supervisors should be assigned to all of the 'Supervisor' groups and clerks should be assigned to 'Clerk' groups.

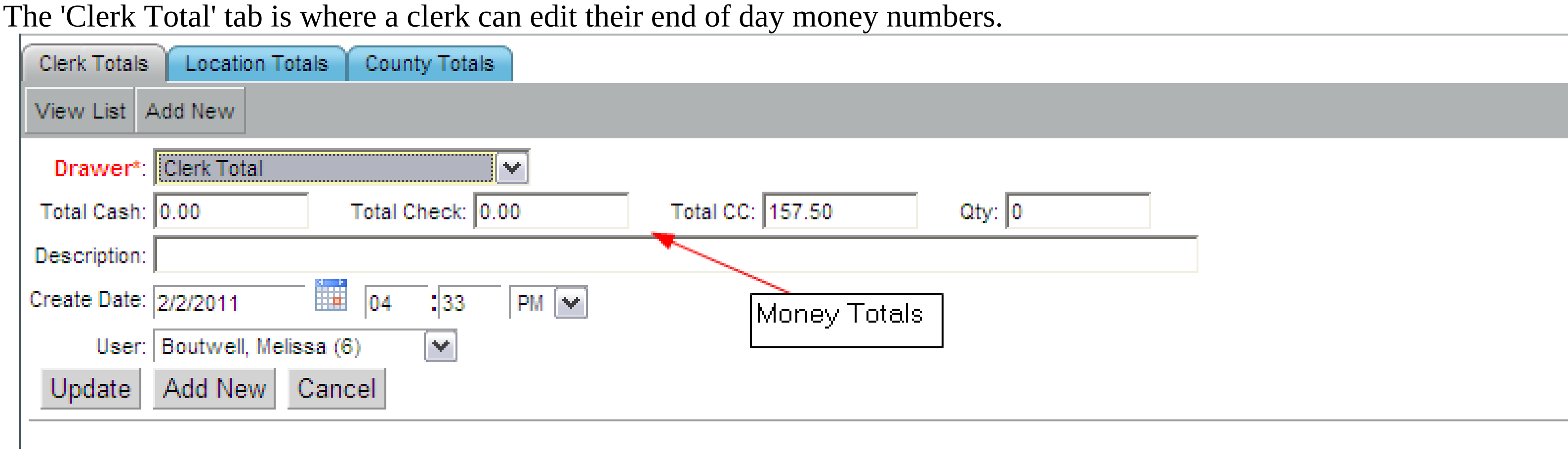
Drawers Tab

The 'Drawers' tab is where clerks are able to add and edit their daily money totals.



Clerk Totals

The 'Clerk Total' tab is where a clerk can edit their end of day money numbers.



Location Totals

The 'Location Totals' tab allows supervisors of each subsite location to enter specific transaction amounts. For example, a supervisor would enter in the ETAPS totals and MLI totals for each office location.

County Totals

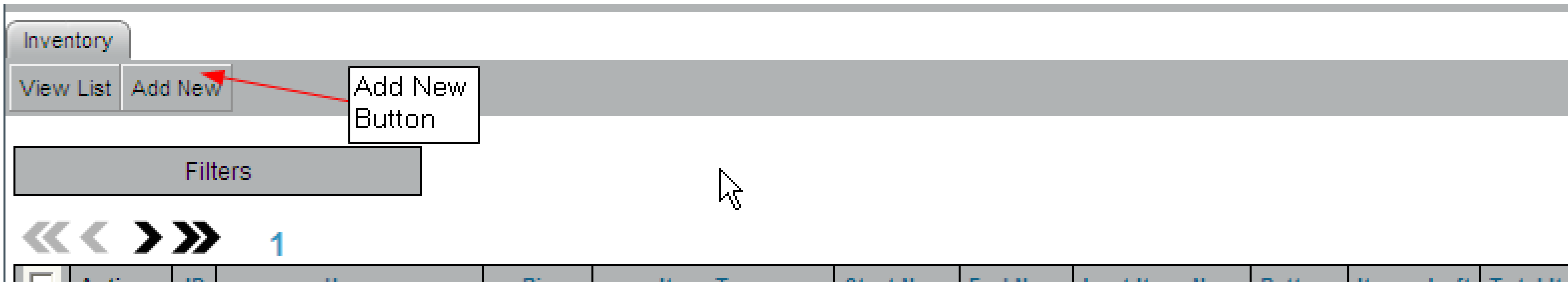
The 'County Totals' tab allows supervisors of each county to enter specific transaction amounts. For example, a supervisor would enter in the ETAPS totals and MLI totals for each county.

Inventory Tab

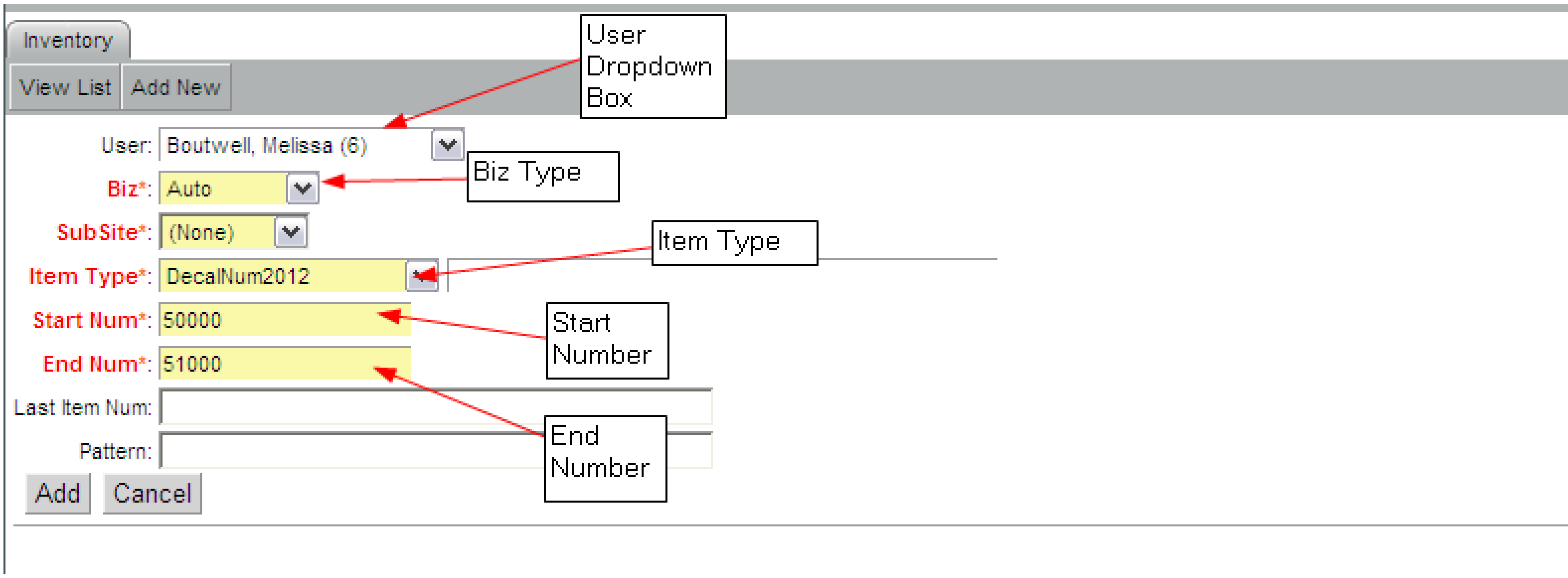
The 'Inventory' tab is where the supervisors add decals and control numbers. They can also edit any inventory that as been previously entered.

Adding Decals

- Select the 'Add New' button



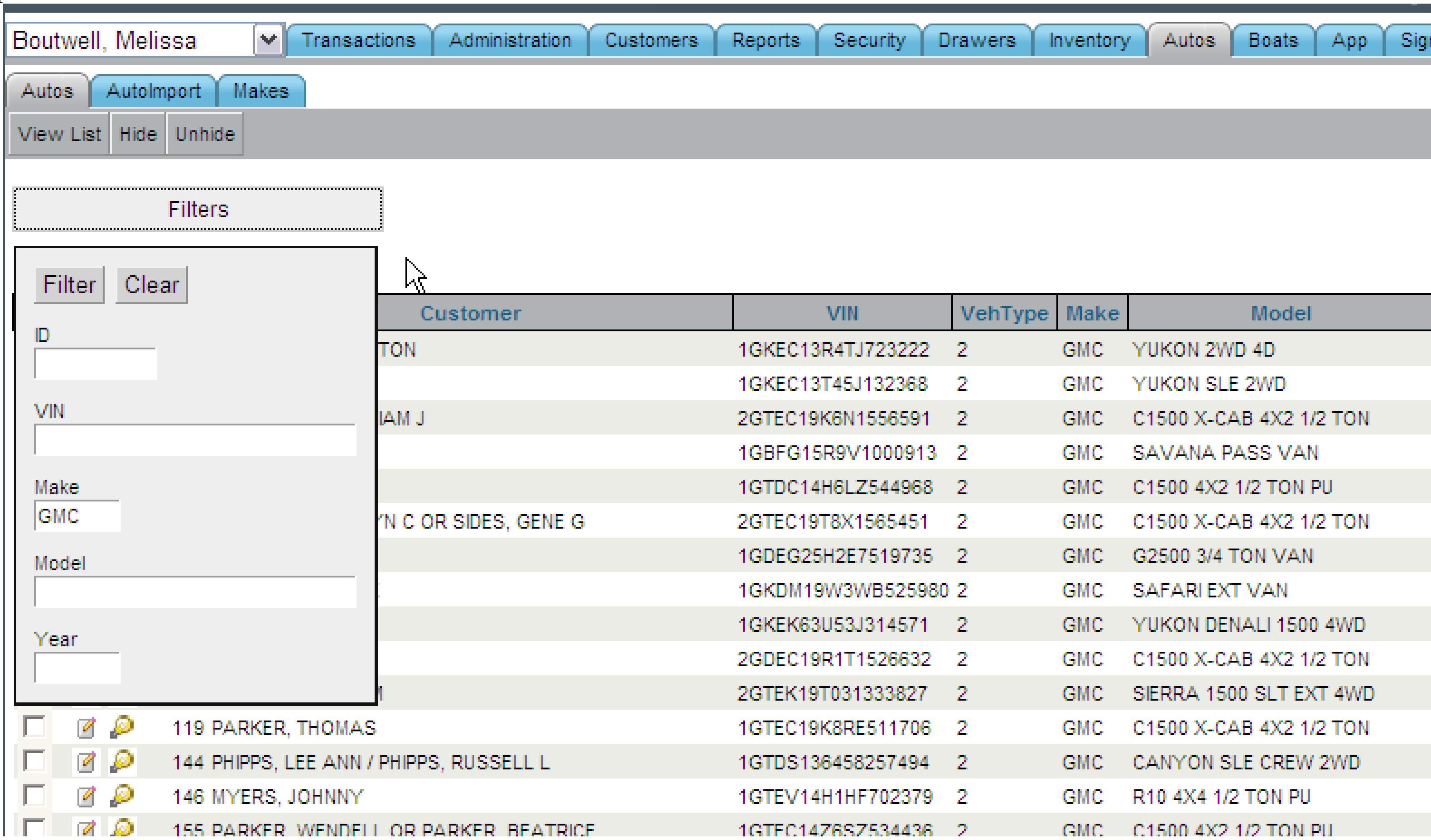
- Select the user that you would like to assign decals
- Select the 'Biz' type
- Select the 'Item Type'
- Select the 'Start Num'
- Select the 'End Num'
- Select the 'Add' button



Autos Tab

Filter Menu

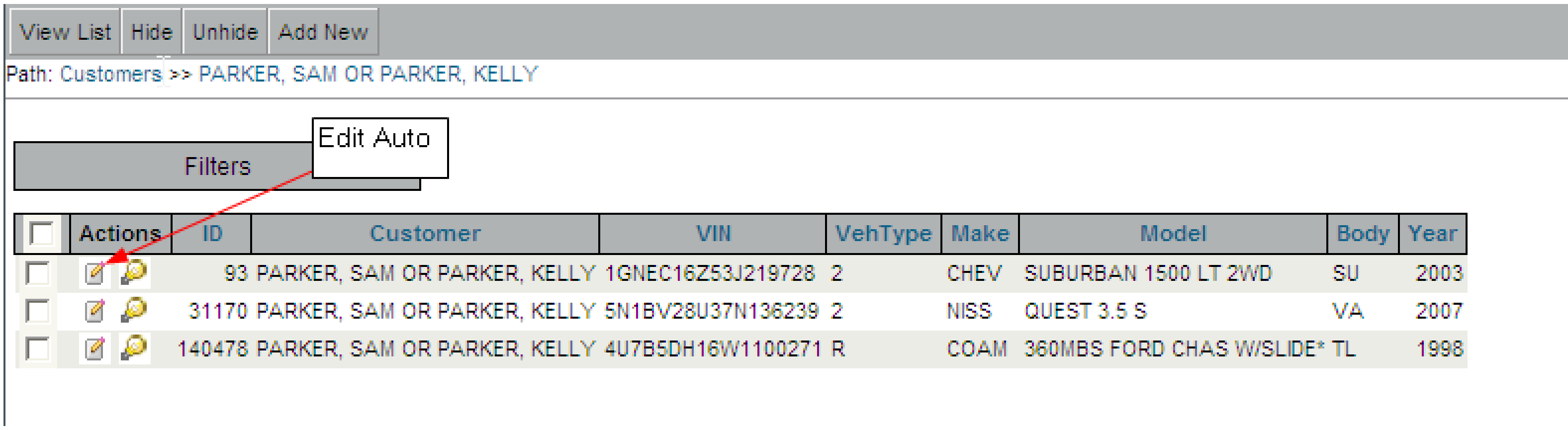
The 'Filters' button will present a drop down menu when selected. This menu is where the clerk can enter in their search parameters.



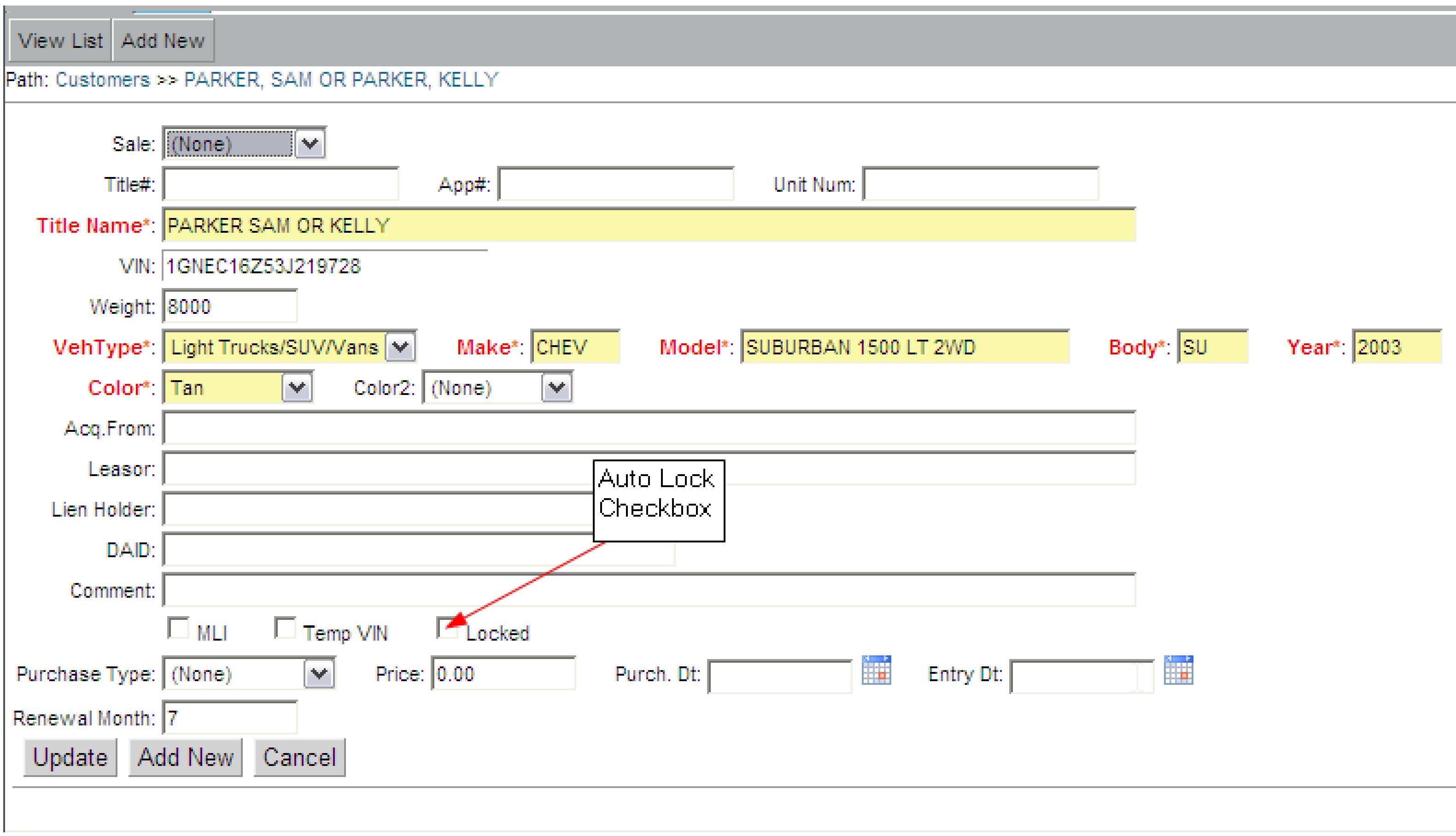
Auto Lock

The auto lock function of the application is used to prevent any transactions from taking place for a specific auto.

- Search for the automobile that needs to be locked
- Edit the auto that needs to be locked



- Select the Locked check box and Update



- If the boat is selected in the application the error message "Auto Lock" will appear and not allow the transaction to be completed
- To unlock a automobile uncheck the Locked checkbox

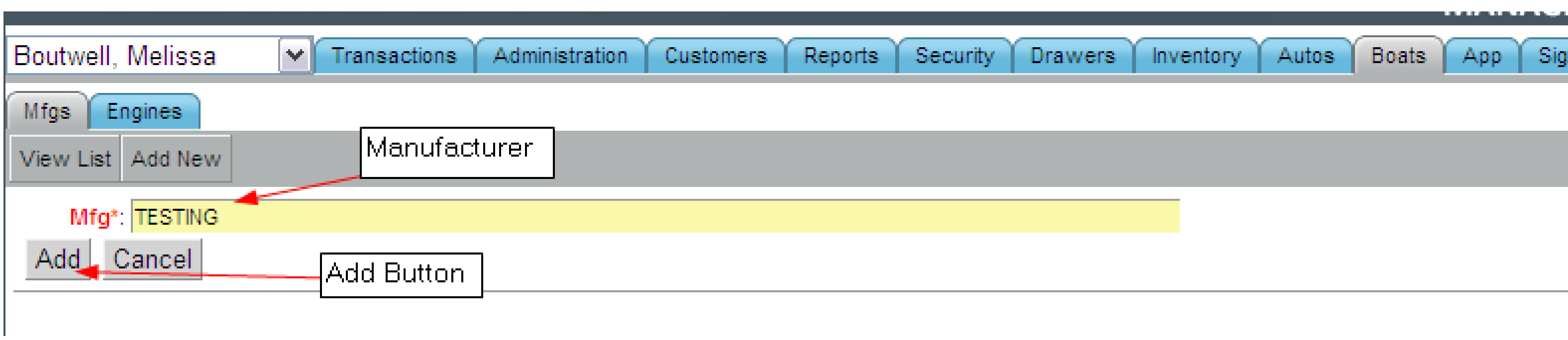
Boats Tab

The 'Boats' tab is where supervisors add boat manufactures and boat engine manufactures.

Add Manufactures

Select the 'Add New' button.

Input the manufacturer and select the add button.



Online Renewal Fulfillment

For your online renewal transactions we will set you up a different ‘Web User’ profile, which will allow you to access and edit web renewal transactions. You will need to add and maintain the ‘Web User’ decal numbers and boat control numbers. When a renewal is sold online we will automatically assign a decal number for automobiles and a control number for boats, but you will have to assign Boat transactions a decal. Below are step by step instructions on what needs to be completed to fulfill your daily web renewals when you come in to work the next day.

Auto

- Go to ‘Admin’ and filter the user drop down by ‘Web User’ and the Biz type by Auto
- To reprint a ‘Web User’ transaction, right click the transaction and select the ‘Reprint (Last)’ from the menu
- If there are multiple transactions that need to be reprinted, select the check boxes next to those specific transactions and click the ‘Reprint(U)’ button at the top of the screen
- If the tag that has been renewed online has a new design, right click the transaction and select ‘Auto Trans’ from the menu
- Update the tag number
- Reprint the transaction

Boats

- Go to ‘Admin’ and filter the user drop down by ‘Web User’ and the Biz type by Boat
- Right click the transaction and select ‘Boat Trans’ from the menu
- Assign that boat a decal number
- Reprint the transaction

EOD Reports

- Your daily EOD reports will now have a row with the ‘Web User’ amounts
- The ‘Diff in Sys #'s’ column in the spread sheet, will be out of balance in increments of a +$5
- For every Payid that was created by a web renewal transaction, there will be a +$5 out of balance
- Any amount that is not in the $5 increment will need to be investigated further
- You will not have to enter a daily cash drawer for the ‘Web User’

FAQ

Q. A renewal that owes deferred taxes, which do not show up in the application.
A.
1) Complete the renewal using standard operational procedures, but do not submit
2) Click on the taxes tab
3) Check the deferred owed checkbox
4) Enter in the market value
5) Enter in tax start date, (The date vehicle was purchased)
6) Enter in the previous expiration date of the tag that is on the vehicle
7) Submit

Q. Charged erroneous fee (realized before transaction is submitted)
A.
1) Enter the admin override code in the top right hand side of the screen
2) Check the fees checkbox
3) Add or subtract any fees that do or do not apply

Q. Charged erroneous fee (realized after transaction is finished) SUPERVISOR ONLY
A.
1) Select the admin module at the top of the screen
2) Select the transaction tab to bring up the search screen
3) Enter the trans ID, and select the biz type that corresponds to the transaction
4) Select the edit button and adjust fees to the correct amount and select update
5) Select the transaction record and add or subtract the fees from corresponding text boxes and select update
6) Select the pay ID and enter the corrected amount for the total transaction and select update

Q. Application will not accept tag format
A.
1) Enter the admin override code in the top right hand side of the screen
2) Check the tag checkbox (this will override tag format)

Q. ETAPS search and choose the wrong customer for the new vehicle
A.
1) Select the admin module at the top of the screen
2) Select the transaction tab to bring up the search screen
3) Enter the trans ID, and select the biz type that corresponds to the transaction
4) Delete the transaction
5) Start over

Q. When clicking finish the clerk is getting an error saying cart could not be completed please check decal or control numbers
A.
1) Contact office supervisor
2) He or She must go in to admin
3) Select inventory
4) Select add new
5) Select the user to add decals to
6) Select the biz type

7) Enter in the item type
8) Enter in the start and finish numbers

Q. New registration from out-of-state is charging back taxes
A.
1) Place the day of that transaction in to the entry date text box under the auto tab
2) If 'None' is selected for the previous tag info, the application will charge a year of back taxes

Q. Ad valorem is not calculating so transaction will not complete
A.
1) Call ADOR and get the correct market value
2) Select the taxes tab
3) Check the ad valorem checkbox
4) Enter in the market value and press tab

Q. After finishing a transaction, it is not printing
A.
1) Make sure that pint queue is open
2) Close and reopen print queue

If it is the first time to complete transaction type
1) Click on print queue
2) For the specific trans type select printer location
3) Select tray to print from
4) Click save

Q. Decal assigned incorrectly
A.
Noticed in the cart
1) Select the toggle decal arrows
2) Select okay to finalize change

Noticed after transaction was finished
1) Select admin
2) Search by transaction ID
3) Select auto transaction button
4) Add or subtract the correct decal number
5) Select update
6) Adjust decals in inventory

Adjusting decals in inventory
1) Select user that needs to have decal adjusted
2) Select decal type
3) Enter in last decal number used in last item number
4) Select update

Q. Out of county transfer that owes deferred taxes
A.
1) Complete the transfer using standard operational procedures, but do not submit
2) Click on the taxes tab
3) Check the deferred owed checkbox

4) Enter in the market value
5) Enter in tax start date, (The date vehicle was purchased)
6) Enter in the previous expiration date of the tag that is on the vehicle
7) Submit