

VERSION 1.1

JULY 6, 2017



M-CAT
Michigan County
Accommodation Tax

ADMINISTRATOR'S MANUAL

[DOCUMENT SUBTITLE]

INTRODUCTION

WELCOME

The Michigan County Accommodation Tax (M-CAT) system is used to provide automated calculation and collection of accommodation tax based on Michigan State law as spelled out in [Act 263 of 1974](#).

For questions not addressed in this manual, please contact:

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WHAT'S NEW

7/6/2017 Initial release of administrator's manual.

FUTURE UPDATES

PLANNED APPLICATION UPDATES

Application Update	Priority
Add icon to Monthly Status screens to show users who have paid online	1
Report to show all Locations who have delinquent tax periods	2
Add starting and ending tax periods for locations	3
Add due date setting to Reporting Period	4
Add Contact Us menu item to tax payer menu	5
Email daily transactions to email list	6
Format currency values so that they show commas	7
Account for locations with seasonal months	8

DOCUMENTATION UPDATES

- Add reporting help content
- Add online formatted system in addition to manual

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COMMON FUNCTIONS

MONTHLY STATUS

This will be the most commonly used section of the system used by administrators. It is where you will monitor payment status, create payments for businesses that have not paid online, make adjustments and corrections, and close out periods.

COLLECTIONS STATUS

When logging into the system, you will come to the Collections Status screen. This screen shows all of the collections made during a month.

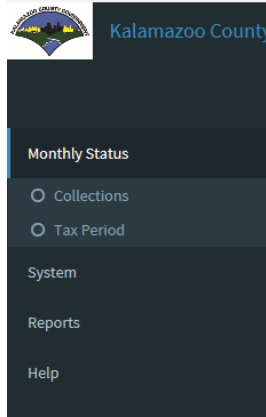
Location	Tax Period	Transaction Date	Net Revenue	Computed Tax	Fines and Interest	Adjustments	Total Owed	Total Paid
40 Winks Motel	May 2017	6/16/2017	\$4,796.12	\$239.81	\$0.00	\$0.00	\$239.81	\$239.81
Airport Inn	May 2017	6/3/2017	\$1,680.00	\$84.00	\$0.00	\$0.00	\$84.00	\$84.00
American Hotel / KaL Hampton Inn / GIA Hosp group	May 2017	6/16/2017	\$33,060.78	\$1,653.04	\$0.00	\$0.00	\$1,653.04	\$1,653.00
Baymont Inn & Suites/Kalamazoo Superior/ 11TH ST	May 2017	6/13/2017	\$107,158.22	\$5,357.91	\$0.00	\$0.00	\$5,357.91	\$5,357.91
Best Western Suite Kalamazoo/11th st/	May 2017	6/20/2017	\$101,734.75	\$5,086.74	\$0.00	\$0.00	\$5,086.74	\$5,086.74
Candlewood Suites	May 2017	6/15/2017	\$132,921.83	\$6,646.09	\$0.00	\$0.00	\$6,646.09	\$6,646.09
Clarion fka Bestwestern/Vaidehi Inc. Court St./DEVII HOSP.	May 2017	6/20/2017	\$78,377.76	\$3,918.89	\$0.00	\$0.00	\$3,918.89	\$3,918.89
Clarion Hotel kna Four Points	May 2017	6/14/2017	\$128,049.32	\$6,402.47	\$0.00	\$0.00	\$6,402.47	\$6,402.47
Comfort Inn Kalamazoo / Reesha Property LLC DBA	May 2017	6/14/2017	\$109,483.50	\$5,474.18	\$0.00	\$0.00	\$5,474.18	\$5,474.18
Comstock Motor Court	May 2017	6/29/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Country Inn & Suites / On Shree Assoc LLC	May 2017	6/12/2017	\$102,020.00	\$5,101.00	\$0.00	\$0.00	\$5,101.00	\$5,101.00
Econo Lodge / VA Investments	May 2017	6/20/2017	\$63,502.20	\$3,175.11	\$0.00	\$0.00	\$3,175.11	\$3,175.11
Fairfield Inn Inc Kalamazoo Field Hotel/Cork Baymont Inn	May 2017	6/13/2017	\$82,587.54	\$4,129.38	\$0.00	\$0.00	\$4,129.38	\$4,129.38
Fairfield Inn West - Kalamazoo / HRC Hotels	May 2017	6/26/2017	\$141,219.01	\$7,060.95	\$0.00	\$0.00	\$7,060.95	\$7,060.95
Festive West Bed & Breakfast	May 2017	6/8/2017	\$1,497.99	\$74.90	\$0.00	\$0.00	\$74.90	\$74.90

1. You can select the Collection Period at the top of the screen. To review different collection periods. You manage the periods that display in this list from the [Manage Tax Periods](#) screen.
2. You can review previous tax information or enter new tax information for a specific Location by clicking on the Location you wish to work with.
3. You can [Close Periods](#) or make [Period Corrections](#) from this screen, but only for open periods. If the Collection period has been closed, you will see the message displayed above. If needed, you can re-open a Period from the [Manage Tax Periods](#) screen.

The Collections Status screen shows all monies collected during a tax period, regardless of the tax period the monies were collected for. For example, if a business paid both May and June taxes in July, both payments would show up on the Collections Status screen.

TAX PERIOD STATUS

By pressing on the Tax Period menu item under Monthly Status on the left side of the screen, you will be taken to the Tax Period Status screen.



You can switch between these screens using the menu.

Tax Period Status

Tax Period: Apr 2017

Net Revenue: \$4,337,974.29
Total Collected: \$216,898.52

Location	Transaction Date	Net Revenue	Computed Tax	Fines and Interest	Adjustments	Total Owed	Total Paid
40 Winks Motel	5/12/2017	\$5,349.51	\$267.48	\$0.00	\$0.00	\$267.48	\$267.48
Airport Inn	5/4/2017	\$1,086.00	\$54.30	\$0.00	\$0.00	\$54.30	\$54.30
American Hotel / Kal. Hampton Inn / GIA Hosp group	5/15/2017	\$22,141.71	\$1,107.09	\$0.00	\$0.00	\$1,107.09	\$1,107.08
Baymont Inn & Suites/Kalamazoo Superior/ 11TH ST	5/15/2017	\$72,321.68	\$3,616.08	\$0.00	\$0.00	\$3,616.08	\$3,616.08
Best Western Suite Kalamazoo/11th st	5/19/2017	\$80,936.26	\$4,046.81	\$0.00	\$0.00	\$4,046.81	\$4,046.81
Candlewood Suites	5/15/2017	\$124,258.60	\$6,212.93	\$0.00	\$0.00	\$6,212.93	\$6,212.93
Clarion fka Bestwestern/Vaidehi Inc. Court St./DEVI HOSP.	5/16/2017	\$59,569.15	\$2,978.46	\$0.00	\$0.00	\$2,978.46	\$2,978.46
Clarion Hotel kna Four Points	5/17/2017	\$118,420.81	\$5,921.04	\$0.00	\$0.00	\$5,921.04	\$5,921.04
Comfort Inn Kalamazoo / Reesha Property LLC DBA	5/15/2017	\$93,839.83	\$4,691.99	\$0.00	\$0.00	\$4,691.99	\$4,691.99
Comstock Motor Court	5/8/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Country Inn & Suites / On Shree Assoc LLC	5/9/2017	\$80,631.00	\$4,031.55	\$0.00	\$0.00	\$4,031.55	\$4,031.00
Econo Lodge / VA Investments	5/19/2017	\$40,508.82	\$2,025.44	\$0.00	\$0.00	\$2,025.44	\$2,025.44
Fairfield Inn Inc Kalamazoo Field Hotel/Cork Baymont Inn	5/15/2017	\$69,119.24	\$3,455.96	\$0.00	\$0.00	\$3,455.96	\$3,455.96
Fairfield Inn West - Kalamazoo / HRC Hotels	5/18/2017	\$95,873.83	\$4,793.69	\$0.00	\$0.00	\$4,793.69	\$4,793.69
Eastern West Bed & Breakfast	5/15/2017	\$1,100.00	\$57.48	\$0.00	\$0.00	\$57.48	\$57.48

The Tax Period Status screen is very similar to the Collections Status screen, but it reports all taxes for a given tax period regardless of when those taxes were collected.

You cannot [Close Periods](#) or make [Period Corrections](#) from this screen.

COLLECTION PERIOD VS TAX PERIOD

As previously mentioned, [Tax Periods](#) are used differently the Collection Status screen and the Tax Period status screen. The tax period in M-CAT is normally a month with additional information tied to it. The tax period, as it is referenced by the Collection Status screen, is a collection of payments made during the month, regardless of the month that the taxes being collected are for.

A business will have taxes due every month, but may not necessarily pay those taxes every month (in the case of a late or deferred payment). If a business paid both May and June taxes in July. Their computed taxes would show up separately in both May and June on the Tax Period Status page, but both payments would show up on the Collections Status screen for July.

The system will automatically change the Period when moving between the Collection Status screen and the Tax Period Status screen. If you have June 2017 selected as the collections period on the Collection Status screen and go to the Tax Period Status screen, the Tax Period will register as May 2017 on the Tax Period Status screen.

We commonly refer to a Tax Period timeframe as month x taxes pay month x + 1 (June taxes pay July for example).

REVIEWING/ENTERING BUSINESS TAXES

You can review previous calculated taxes or enter tax information for a specific location by clicking on that location from either the Tax Period Status screen or the Collections Status screen.

Manage Account - Taxes

Best Western Suite
Kalamazoo/11th st/
2575 S 11th St
Kalamazoo, MI 49009

Contact Name: Jai Bhatti
Email Address: office@bwkalamazoo.com
Phone Number: (269)350-5522

Taxes Transactions

Tax Period	Feb 2017
Transaction Date	3/13/2017
Total Revenue	66036.31
LESS 'Transient Guest'	0.00
NET REVENUE	66036.31
5% of Net Revenue	3301.82
Fines	0.00
Interest	0.00
Adjustments	0.00
Total Owed	3301.82
Total Paid	3301.82

Payment Success:
Payment Note: Processed via PayerExpress.

Save Back to List

1. Location Contact information

You can update the Contact information for the Location by editing the information in this section. Note that the tax payer can update this information from the tax payer side of the system.

2. Change View and Comment flag

You can switch between the Tax view and the Transaction view by clicking on the associated button here. The Transaction view shows a list of all separate transactions for this Location regardless of Tax Period. You cannot modify a transaction record from the Transaction view, only from the Taxes view.

If there is a comment made for the tax period being viewed, an icon will display in this section.

3. Tax Information

Following are special notes for each field in the Taxes view:

Tax Period – Changing the tax period will update the tax view to show data for the selected tax period.

Transaction date – If no data had previously been saved for the selected Tax Period, this value will default to the current date. If you select a date that falls within a closed period, you will receive a message stating that the period is closed and the Save button at the bottom of the screen will be disabled.

Total Revenue – Reported revenue for the selected Tax Period.

Transient Guest – Amount subtracted from Revenue for guests that stay over 30 days.

Calculate Button – Clicking this button will calculate all taxes, fines, and Interest and populate the rest of the fields on the screen.

Net Revenue – This value is created when the Calculate button is pressed and cannot be changed without updating the Total Revenue value, the Transient Guest value, or both and then pressing on the Calculate button again. It is the Total Revenue value minus the Transient Guest value.

5% of Net Revenue – Calculated Tax. Can only be updated in the same way that Net Revenue is.

Fines – Calculated Fines for late payments (5% of the calculated tax per month late for a max of 5 months). This value can be overridden from the calculated amount.

Interest – Calculated Interest for late payments (1% of the calculated tax per month late). This value can be overridden from the calculated amount.

Adjustments – Any adjustments to calculated values. A note for the adjustment must be entered in the field directly to the right of the value. This value will show up as a separate transaction in the system.

Total Owed – Calculated Tax + Fines + Interest + Adjustments.

Total Paid – The amount paid by the location. This value defaults to the Total Owed value, but can be overwritten.

Payment Success – Indicates that all taxes have been paid for the selected Tax Period for this Location. The system will consider the taxes unpaid unless this is checked and can be used for 0.00 owed taxes.

Payment Note – Any comments pertaining to this Tax Period for this Location.

4. Save button and Back to List link

No records will be saved unless the Save button is pressed. If you wish to cancel all operations, you can select the Back to List link to take you back to the Tax Period Status screen or the Collection Status screen.

CLOSING A PERIOD

At the top of the Collections Status page is a button that allows you close the current period.

Location	Tax Period	Transaction Date	Net Revenue	Computed Tax	Fines and Interest	Adjustments	Total Owed	Total Paid
Airport Inn	Jun 2017	7/4/2017	\$3,743.00	\$187.15	\$0.00	\$0.00	\$187.15	\$187.15

1. Click on this button to close the current period. When a period is closed, no further transactions are allowed with a transaction date that falls within that period. If you must, you can re-open the period using the [Tax Period Maintenance](#) screens.

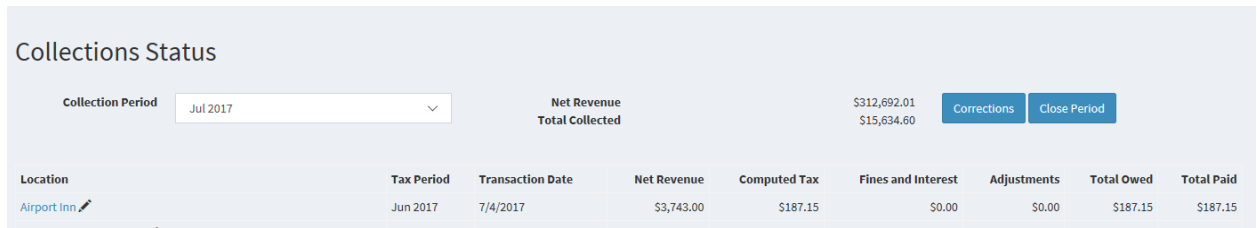
When the period is closed, you will no longer see the Close Period button on the Collections Status screen, you will see a note stating that the period is closed, like below:

Location	Tax Period	Transaction Date	Net Revenue	Computed Tax	Fines and Interest	Adjustments	Total Owed
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PERIOD CORRECTIONS

Period corrections are corrections that are made to affect overall tax revenue reporting for the county for a given period. An example of a scenario this would be used is to correct reporting errors for periods that have been closed and reported previously.

It is accessed from the Collections Status screen, and is not available for periods that are already closed.



Collections Status

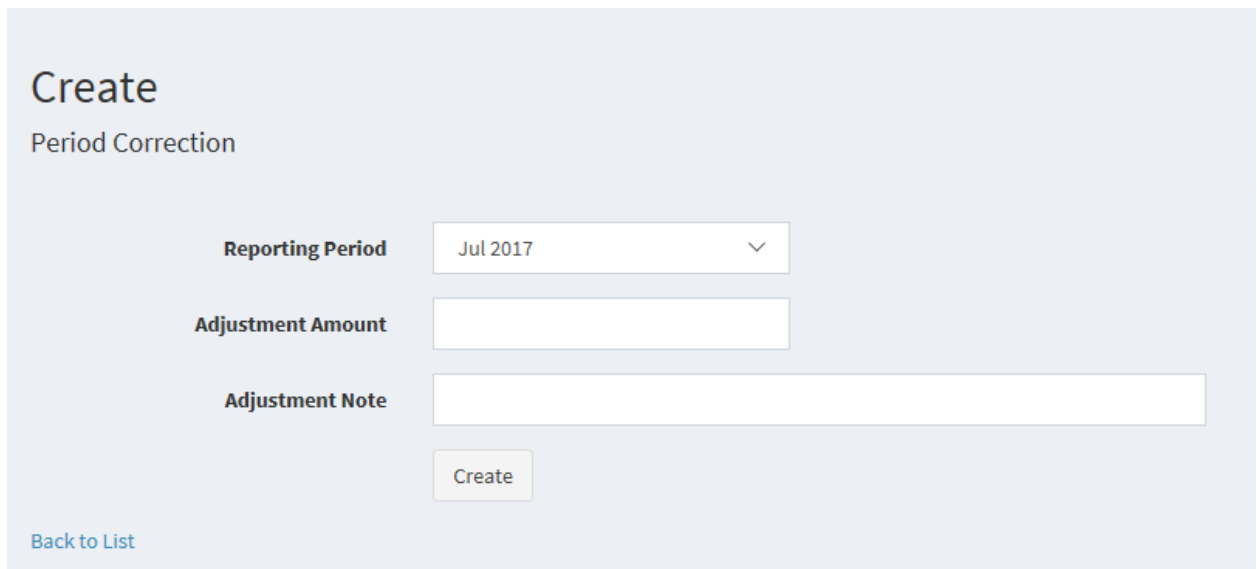
Collection Period: Jul 2017

Net Revenue Total Collected: \$312,692.01 / \$15,634.60

Buttons: Corrections, Close Period

Location	Tax Period	Transaction Date	Net Revenue	Computed Tax	Fines and Interest	Adjustments	Total Owed	Total Paid
Airport Inn	Jun 2017	7/4/2017	\$3,743.00	\$187.15	\$0.00	\$0.00	\$187.15	\$187.15

When you click on the Corrections button the first time for a given period, you will be taken directly to the Create Period Collection screen.



Create
Period Correction

Reporting Period: Jul 2017

Adjustment Amount: [Input Field]

Adjustment Note: [Input Field]

Create

[Back to List](#)

You simply enter the Amount and a Note for the correction and press the Create button. Note that there is no Location associated with a correction.

This will take you to the list of corrections for a given period (you can have multiple corrections in a period):

Corrections - Jul 2017

[Create New](#)

Reporting Period Name

Jul 2017

[Return](#)

Adjustment Amount

-50.00

Adjustment Note

Over reported revenue for June

[Edit](#) | [Delete](#)

1. You can update or delete a correction by clicking on the corresponding Edit or Delete link.
2. You can add corrections to the period by clicking on the Create New link.
3. Clicking on the Return link will return you to the Collections Status screen you started from.

Any time that you have corrections created for a time period, the Corrections button on the Collections Status screen will display with a red background:

Collections Status

Collection Period

Jul 2017

Net Revenue
Total Collected

\$312,692.01
\$15,634.60

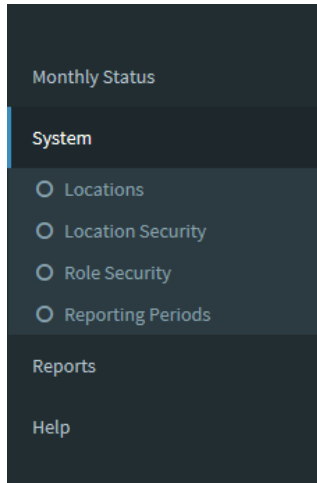
[Corrections](#)

[Close Period](#)

MANAGING LOCATIONS

You use the Manage Locations section of the system to add, edit, and delete Locations, as well as to enter the Tax Payer side of the system for a specific Location.

You get to the Manage Locations section by selecting Locations under the System menu:



This will take you to the Locations listing screen.

Manage Locations

Create New 1

Location Name	Client Name	Address 1	City	State	Zip Code	2
40 Winks Motel	40 Winks Motel	2605 Douglas	Kalamazoo	MI	49007	Edit Main Site Delete
Airport Inn	Airport Inn	2333 Helen	Portage	MI	49002	Edit Main Site Delete
American Hotel / Kal. Hampton Inn / GIA Hosp group	American Hotel / Kal. Hampton Inn / GIA Hosp group	1550 E Kilgore Rd	Kalamazoo	MI	49001	Edit Main Site Delete
Baymont Inn & Suites/Kalamazoo Superior/ 11TH ST	Baymont Inn & Suites/Kalamazoo Superior/ 11TH ST	2203 South 11th St	Kalamazoo	MI	49009	Edit Main Site Delete
Best Western Suite Kalamazoo/11th st/	Best Western Suite Kalamazoo/11th st/	2575 S 11th St	Kalamazoo	MI	49009	Edit Main Site Delete
Candlewood Suites	Candlewood Suites	3443 Retail Place Dr	Kalamazoo	MI	49048	Edit Main Site Delete
Clarion fka Bestwestern/Vaidehi Inc. Court St./DEVI HOSP.	Clarion fka Bestwestern/Vaidehi Inc. Court St./DEVI HOSP.	3640 E Cork St	Kalamazoo	MI	49001	Edit Main Site Delete
Clarion Hotel kna Four Points	Clarion Hotel kna Four Points	3600 E Cork St	Kalamazoo	MI	49001	Edit Main Site Delete
Comfort Inn Kalamazoo / Reesha Property LLC DBA	Comfort Inn Kalamazoo / Reesha Property LLC DBA	739 W Michigan	Kalamazoo	MI	49007	Edit Main Site Delete
Comstock Motor Court	Comstock Motor Court	PO Box 606	Comstock	MI	49041	Edit Main Site Delete
Country Inn & Suites / On Shree Assoc LLC	Country Inn & Suites / On Shree Assoc LLC	1912 E Kilgore Rd	Kalamazoo	MI	49002	Edit Main Site Delete
Econo Lodge / VA Investments	Econo Lodge / VA Investments	3750 Easy St	Kalamazoo	MI	49001	Edit Main Site Delete
Fairfield Inn Inc Kalamazoo Field Hotel/Cork Baymont Inn	Fairfield Inn Inc Kalamazoo Field Hotel/Cork Baymont Inn	3800 E Cork St	Kalamazoo	MI	49001	Edit Main Site Delete
Fairfield Inn West - Kalamazoo / HRC Hotels	Fairfield Inn West - Kalamazoo / HRC Hotels	6420 Cracker Barrel Dr	Kalamazoo	MI	49009	Edit Main Site Delete

1. By clicking on the Create New link, you will be taken to the [Create Location](#) page.
2. You can Edit or Delete a Location by selecting the corresponding link for the Location you want to change. By clicking on the Main Site link, you will be taken to the [Home Page](#) for the selected Location and see it exactly as the tax payer sees the site when they log in.

CREATE LOCATION

Create

Location

Location Name	<input type="text"/>
Client Location Name	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code	<input type="text"/>
BusinessId	<input type="text" value="--Use Location as Business--"/>

[Back to List](#)

Location Name – The name of the Location as viewed on the administrative side of the system. This is the name that will show up in all administrator screens and reports.

Client Location Name – The name of the location as defined by the tax payer. This is how the location name will appear on the tax payer side of the system.

BusinessId – Select the business that you want this location to belong to. If you keep the default “— Use Location as Business—” a new Business will be created with the same name as the Location. The Business value is not currently used in the system, but is planned for future reporting.

Create – Click on this button to create and save the new Location.

Back to List – To cancel, or return to the Manage Locations list, click on this link.

LOCATION MAIN SITE

The Location Main Site link takes you to the location Home Page where you can view the system the same way each tax payer sees the system when they login.

The screenshot shows the user interface for the Kalamazoo County Accommodation Tax System. At the top, there is a header with the system name and a user email address. On the left, a dark sidebar contains navigation links: Home, Update Contact, and Admin Menu. The main content area displays the following information:

**Clarion fka Bestwestern/Vaidehi Inc.
Court St./DEVI HOSP.**
3640 E Cork St
Kalamazoo, MI 49001

Reported Revenue (YTD) \$280,850.74
Accommodation Tax (YTD) \$14,034.55

Contact Name: Abdul Qadeer
Email Address: [redacted]
Phone Number: (269)381-1900

Period	Net Revenue	Computed Tax	Fines and Interest	Adjustments	Total Owed	Total Paid
Jun 2017	\$0.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00
May 2017	\$78,377.76	\$3,918.89	0.00	\$0.00	\$3,918.89	\$3,918.89
Apr 2017	\$59,569.15	\$2,978.46	0.00	\$0.00	\$2,978.46	\$2,978.46
Mar 2017	\$55,210.18	\$2,760.51	0.00	(\$8.00)	\$2,752.51	\$2,752.52
Feb 2017	\$48,408.97	\$2,420.45	0.00	\$0.00	\$2,420.45	\$2,420.45
Jan 2017	\$39,284.68	\$1,964.23	0.00	\$0.00	\$1,964.23	\$1,964.23
Dec 2016	\$35,098.14	\$1,754.91	0.00	\$0.00	\$1,754.91	\$1,754.91
Nov 2016	\$53,178.38	\$2,658.92	0.00	\$0.00	\$0.00	\$2,658.92
Oct 2016	\$66,784.65	\$3,339.23	0.00	\$0.00	\$3,339.23	\$3,339.23
Sep 2016	\$76,563.06	\$3,828.15	0.00	\$0.00	\$3,828.15	\$3,828.15
Aug 2016	\$80,203.60	\$4,010.18	0.00	\$0.00	\$4,010.18	\$4,010.18
Jul 2016	\$77,701.80	\$0.00	0.00	\$0.00	\$3,885.09	\$3,885.09

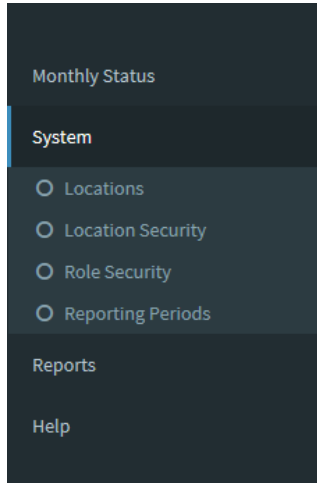
All functionality operates just like it does for the tax payer. For more information on this, please see the User Manual.

The only difference is when you go to the home page as an administrator, you have an additional menu item "Admin Menu" which takes you back to the Manage Locations list screen. Tax payers do not see this menu option.

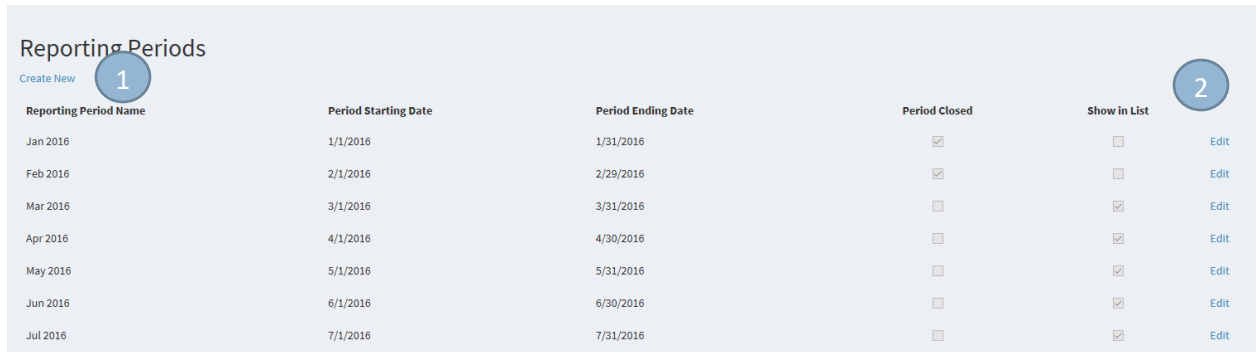
This image shows a close-up of the dark sidebar navigation menu. It contains three items: "Home", "Update Contact", and "Admin Menu", all displayed in a light blue font.

REPORTING PERIODS

Reporting Periods are the time periods used by the system for calculating tax (tax period) and performing collections reporting (collections period). A Reporting Period is a calendar month with settings attached to it. You get to the Manage Reporting Periods list by selecting Reporting Periods under the System menu option:



This takes you to the Manage Reporting Periods list below:

The screenshot shows a table titled "Reporting Periods" with a "Create New" link circled in blue with the number "1". The table has columns for "Reporting Period Name", "Period Starting Date", "Period Ending Date", "Period Closed", and "Show in List". The "Show in List" column has checkboxes, and the "Edit" link for each row is circled in blue with the number "2".

Reporting Period Name	Period Starting Date	Period Ending Date	Period Closed	Show in List	
Jan 2016	1/1/2016	1/31/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit
Feb 2016	2/1/2016	2/29/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit
Mar 2016	3/1/2016	3/31/2016	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Apr 2016	4/1/2016	4/30/2016	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
May 2016	5/1/2016	5/31/2016	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Jun 2016	6/1/2016	6/30/2016	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Jul 2016	7/1/2016	7/31/2016	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

1. Click on the Create New link to create a new Reporting Period. You may enter as many Reporting Periods into the future you like. The first time an administrator logs into the system on a date that is not defined, a new reporting period for that month is automatically created.
2. Click on the Edit for Reporting Period you would like to [update](#).

EDIT REPORTING PERIOD

Reporting Period

Edit

Reporting Period Name

Period Starting Date

Period Ending Date

Period Closed

Show in List

[Back to List](#)

Reporting Period Name – How you would like the Reporting Period to display in your lists and reports.

Period Closed – Sets whether the Reporting Period is closed for Collections. If this is checked, you can no longer add transactions with a date between the Period Starting Date and the Period Ending Date. This option is automatically set when you click on the Close Period button on the [Collections Status screen](#).

Show in List – This setting determines if the Reporting Period will be shown in the period selection lists in the system. This is used to limit the number of items in the lists so that they do not become unwieldy. If the user wants to access historical data they can simply set this value for the historical reporting period and access it normally through the system.

REGISTERING A NEW USER

There is an involved process where tax payers request access to the system and are then granted access by an administrator. This is done for security purposes while not placing a large burden on the application administrators.

The process flows like this:

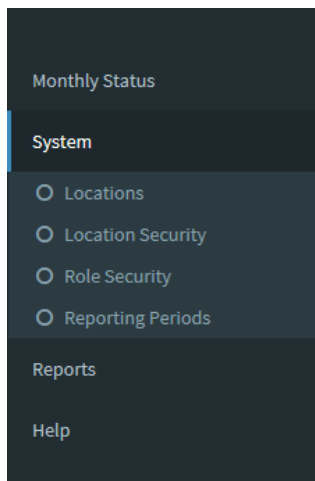
1. A new user (tax payer) request registration through the system (Please see the Request New Account Manual which you can download from the login screen).
2. An email is sent to system administrators for the county with information on the location, and tax payer contact information.
3. An administrator uses the system to register the tax payer using the information in the email request.
4. An email with a link containing a login security token is sent to the tax payer. This happens automatically when the administrator registers the tax payer.
5. The tax payer clicks on the link provided and is taken to a screen where they create a password for access (process defined in the Request New Account Manual).
6. The tax payer now has a valid account and login into the system at any time. They will only have access to the Location(s) they are registered for.

EMAIL REQUEST FOR REGISTRATION

Predefined administrators for the system will receive an email when a new tax payer request a new registration. This email should contain the location name, address, and an email to use for the login. User this information to create a new registration, but beware that not all requests are valid.

REGISTERING A NEW LOCATION

Go to the register a new location section of the application by selecting the Location Security menu item under System.



This will take you to the Location Security List:

Location Name	Address	User Id	
40 Winks Motel	2605 Douglas	kjackson5595@gmail.com	Register
Airport Inn	2333 Helen	salimshahsindhi@yahoo.com	Register
American Hotel / Kal. Hampton Inn / GIA Hosp group	1550 E Kilgore Rd		Register
Baymont Inn & Suites/Kalamazoo Superior/ 11TH ST	2203 South 11th St		Register
Best Western Suite Kalamazoo/11th st/	2575 S 11th St	office@bwkalamazoo.com	Register
Candlewood Suites	3443 Retail Place Dr	anant.i.patel@gmail.com	Register
Clarion Rka Bestwestern/Vaidehi Inc. Court St./DEVI HOSP.	3640 E Cork St		Register
Clarion Hotel kna Four Points	3600 E Cork St		Register
Comfort Inn Kalamazoo / Reesha Property LLC DBA	739 W Michigan	johnd@portageincometax.com	Register

If a location has a User Id assigned, you know that they have already been registered. You can update the User Id for a location, but a location can only have one User Id associated with it. However, a User Id may be associated to multiple Locations.

Clicking on the Register link for the Location you'd like to register will take you to the Register Account screen:

Register

Register Account

Location

Login Email

[Back to List](#)

From here, you only need to enter the login email that was sent to you in the registration request email and press the Register button. This will create the login in the system and send the email documented in the Request New Account Manual.

ADDING A NEW ADMINISTRATIVE USER

You can add new non-tax payer accounts (administrative) to the system by selecting Role Security under the System menu item.

This will take you to the Role Security List screen:

Login Email	Role	
kjackson@myriadcypher.com	Admin	Delete
dkburl@kalcouny.com	Admin	Delete
jmharr@kalcouny.com	Admin	Delete
jcook@discoverkalamazoo.com	ROAdmin	Delete
gayars@discoverkalamazoo.com	ROAdmin	Delete

1. Remove administrative users by clicking on the Delete link next to the user account you wish to delete.
2. Add new user by clicking on the New User Role link. This will take you to the Assign New Role screen:

Register
Assign New Role

Login Email

Role Admin
ROAdmin

Save

[Back to List](#)

Login Email – Enter the email address that the administrator will be using to login into the system with.

Role – Select the Role for the new user.

Admin – has full edit rights to the system and can do anything defined in this manual

ROAdmin – has read only access to the system. They have access to a large portion of the functions defined in this manual, but no access to make changes to data.

Save – Click to create and save the new account.

Back to List – Click to cancel and return to the Role Security list.

REPORTING

SPREADSHEET REPORTING

PERIOD SUMMARY

MONTHLY RECAP

YEAR TO DATE