



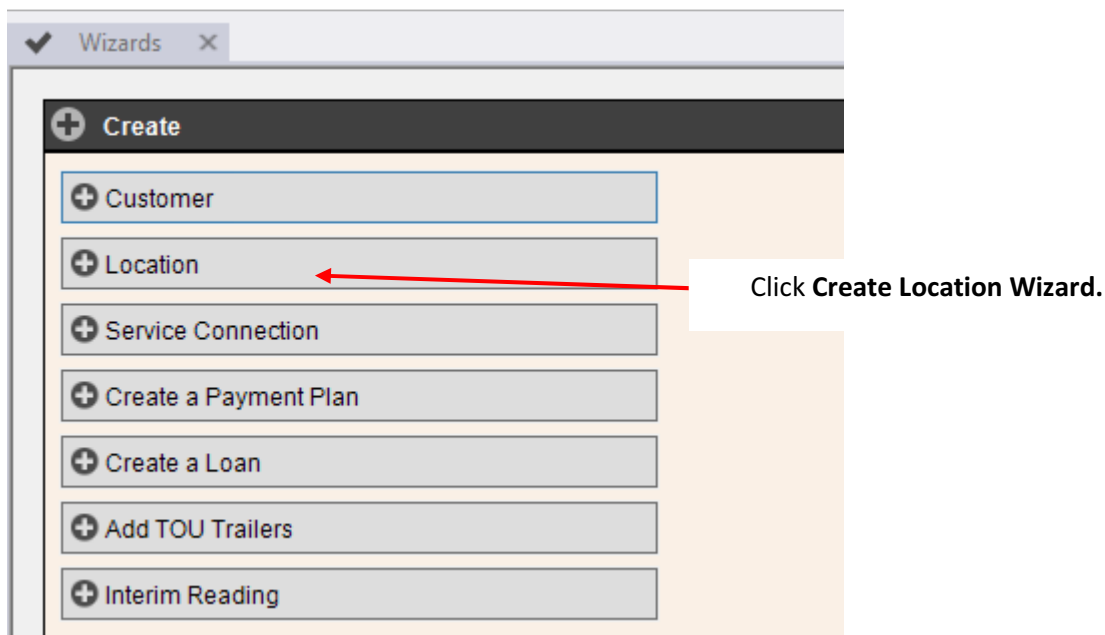
## New Account Setup with Create Location Wizard Instructions

To create a new account in EDIFICE you will need to set up information for: the location, the customer, the services and connections. All of this information is used to bill and manage the account. These instructions explain how to create a new account starting with the Create Location Wizard. This wizard will take you step by step through the process of setting up all the necessary information for a new account. However, it's important to note that there are other ways to set up a new account in addition to using the Create Location wizard.

**Note:** For additional information on specific fields in the Create Location wizard, please refer to the EDIFICE Web Help by right-clicking in the wizard and selecting **Help**.

To get started, open the Wizard view and click **Location** under the Create section.

Or, from the Location view, click **Add New Location** .





### Create Location

After choosing the Create Location wizard, the following window displays. Enter information about the physical location of the account.

Wizard

Steps

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

Enter the Location ID to Add

Location

1: Enter Location ID  
2: Specify Location Information  
3: Specify Location Information (Cont.)  
4: Specify Owner  
5: Specify Tenant  
6: Specify Service Information  
7: Add Connections

Narrative

Enter the Location ID of the Location that you are creating.

The ID **must** be unique to the system.

The ID may contain ALPHA or NUMERIC values and has a maximim length of 12.

Back Next

Enter the Location ID. Refer to your utility's policies for assigning location IDs. Then, click **Next**.

Wizard

Steps

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

Edit the Information to Describe the New Location

Book Number

Sequence Number 0.00

Cycle Number 0

Carrier Route 0

Property Book

Property Page

Property Map

Property Lot

Property Sub

Property Type

Property Unit

Status Occupied

1: Enter Location ID  
2: Specify Location Information  
3: Specify Location Information (Cont.)  
4: Specify Owner  
5: Specify Tenant  
6: Specify Service Information  
7: Add Connections

Narrative

These fields describe the Billing Cycle and Book this location belongs.

Back Next

Enter location Information including the book and sequence number. Then, click **Next**.



Wizard

**Steps**

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

Edit the Information to Describe the New Location

Memo

Property ID

Elevation

Longitude

Latitude

Unit Number

House Number

Street Index  MAIN ST

---

Special Condition ID

Geographic Area ID

Facility Type ID

**1: Enter Location ID**

Location ID	009966775544
-------------	--------------

**2: Specify Location Information**

Book Number	0010
Cycle Number	0
Sequence Number	0.00
Carrier Route	0
Property Book	
Property Page	
Property Map	
Property Lot	
Property Sub	
Property Type	
Property Unit	
Status	Occupied

**3: Specify Location Information (Cont.)**

**4: Specify Owner**

**5: Specify Tenant**

**6: Specify Service Information**

Narrative

These fields describe the physical location of the property.

**Elevation, Longitude, Latitude, and Special Condition** are fields used in the Line Mapping Package.

Enter location information.  
Be sure to specify the house number and select the correct street index ID.  
Then, click **Next**.

Back Next

Wizard

**Steps**

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

Specify the Owner for this Location

Owner ID

**1: Enter Location ID**

Location ID	009966775544
-------------	--------------

**2: Specify Location Information**

Book Number	0010
Cycle Number	0
Sequence Number	0.00
Carrier Route	0
Property Book	
Property Page	
Property Map	
Property Lot	
Property Sub	
Property Type	
Property Unit	
Status	Occupied

**3: Specify Location Information (Cont.)**

Memo	
Property ID	
Unit Number	
House Number	
Street Index	0001
Elevation	0.000
Longitude Degree	0.0000000
Latitude Degree	0.0000000
Special Condition ID	
Geographic Area ID	
Facility Type ID	

**4: Specify Owner**

**5: Specify Tenant**

**6: Specify Service Information**

**7: Add Connections**

Narrative

The **Owner ID** is the current owner of the location.

The Owner is the default customer account responsible for all charges billed to the location.

A location is required to have an owner.  
To assign an owner that already exists, enter the owner ID or, click **Search** to find it.  
Or, to create a new owner ID, click the **wizard**.

Back Next Finish



### Create Customer Information for Owners & Tenants

If the owner information needs to be created, follow these steps. Otherwise, skip to page 10.

Wizard

**Steps**  
 1: Choose Customer ID  
 2: Specify Information  
 3: Specify Information (Cont.)  
 4: Specify Information (Cont.)  
 5: Service Information

**Choose the New Customer ID**

Customer

The system can assign the next available customer ID, or you can assign an ID based on your utility's policies. Then, click **Next**.

**1: Choose Customer ID**  
 Customer ID 009966775544

**2: Specify Information**

First	
Middle	
Last	
Area Code 1	
Phone Number 1	
Area Code 2	
Phone Number 2	
Area Code 3	
Phone Number 3	
Note 1	
Note 2	
SSN	
Driver's License	
eMail	

**3: Specify Information (Cont.)**  
**4: Specify Information (Cont.)**  
**5: Service Information**

**Narrative**  
 Enter a new Customer ID that does not currently exist in your system. This can be a 12 digit Alpha/Numeric value.

Wizard

**Steps**  
 1: Choose Customer ID  
 2: Specify Information  
 3: Specify Information (Cont.)  
 4: Specify Information (Cont.)  
 5: Service Information

**Edit the Information to Describe the New Customer**

First Name   
 Middle Initial   
 Last/Business Name

Phone Number 1    
 Phone Number 2    
 Phone Number 3

Social Security Number   
 Driver's License Number

**e-Mail Address**

Note 1   
 Note 2

Enter the customer name and general information. Then, click **Next**.



Wizard

Steps

- 1: Choose Customer ID
- 2: Specify Information
- 3: Specify Information (Cont.)
- 4: Specify Information (Cont.)
- 5: Service Information

Edit the Information to Describe the New Customer

C/O First Name

C/O Middle Initial

C/O Last Name

Address Line-1

Address Line-2

Address Line-3

City

State, Zip

Delivery Point

Second Account Number

1: Choose Customer ID

Customer ID	009966775544
-------------	--------------

2: Specify Information

First	MARK
Middle	C.
Last	GREEN
Area Code 1	207
Phone Number 1	078-3236
Area Code 2	207
Phone Number 2	776-4242
Area Code 3	
Phone Number 3	
Note 1	
Note 2	
SSN	

DSYS.COM

Narrative

This information will print on any billing forms.  
The Second Account Number is an informational value.

Back Next Finish

Enter the address where bills should be sent, then click Next.

Wizard

Steps

- 1: Choose Customer ID
- 2: Specify Information
- 3: Specify Information (Cont.)
- 4: Specify Information (Cont.)
- 5: Service Information

Edit the Information to Describe the New Customer

Message Code 1

Message Code 2

Message Code 3

Courtesy Statement

1: Choose Customer ID

Customer ID	009966775544
-------------	--------------

2: Specify Information

First	MARK
Middle	C.
Last	GREEN
Area Code 1	207
Phone Number 1	078-3236
Area Code 2	207
Phone Number 2	776-4242
Area Code 3	
Phone Number 3	
Note 1	
Note 2	
SSN	
Driver's License	
eMail	MCG@NDSYS.COM

3: Specify Information (Cont.)

C/O First	
C/O Middle	
C/O Last	
Address Line 1	123 MAINE STREET
Address Line 2	
Address Line 3	
City	FAIRCITY
State	ME
Zip	04105
Delivery Point	
Second Account Number	

4: Specify Information (Cont.)

5: Service Information

Narrative

Add messages pertaining to the customer, if applicable and indicate if the customer should receive courtesy statements. Then, click Next.

Back Next Finish



### Adding Service(s) to Customer

Go through the steps for adding service information to the customer for each service that the customer uses. If the customer has multiple services, you must go through these steps for each service they have.

Wizard

Steps: 1: Choose Customer ID, 2: Specify Information, 3: Specify Information (Cont.), 4: Specify Information (Cont.), 5: Service Information

Select a Service to Edit the Customer Information

Services: WATER, SEWER, FIRE, LIVE, BACKER

1: Choose Customer ID  
Customer ID: 009966775544

2: Specify Information  
First: MARK, Middle: C, Last: GREEN, Area Code 1: 207, Phone Number 1: 078-3236, Area Code 2: 207, Phone Number 2: 776-4242, Area Code 3: , Phone Number 3: , Note 1: , Note 2: , SSN: , Driver's License: , eMail: MCG@NDSYS.COM

3: Specify Information (Cont.)  
C/O First: , C/O Middle: , C/O Last: , Address Line 1: 123 MAINE STREET, Address Line 2: , Address Line 3: , City: FAIRCITY, State: ME, Zip: 04105, Delivery Point: , Second Account Number:

4: Specify Information (Cont.)  
Message 1: , Message 2: , Message 3: , Courtesy Statement: No

5: Service Information

Narrative: This information sets the activity for each service for the selected customer. This information is necessary for activity to take place for a given customer for the selected service. NOTE: Without service settings no billing will occur for this customer.

Click to select the service for the customer. After selecting the service, the wizard automatically moves to the next screen.

Buttons: Back, Next, Finish

Wizard

Steps: 1: Service Information, 2: Service Information (Cont.), 3: Service Process Information

Edit the Customer Service Information

WATER

Status: Active

Service Active Date:

Finance Period:

Allow Finance Charges: Yes

Discount Code: None

Discount Grace Days: 0

Rate Class:

Billing Frequency: 4

Lienable: Yes

Rollable: Yes

Company Number: 99

Number Units: 0.00000

Category:

1: Service Information

2: Service Information (Cont.)

3: Service Process Information

Narrative: These fields describe how this service is billed for this customer.

Enter the general service information including the finance period, rate class and billing frequency. Then, click Next.

Buttons: Back, Next, Finish



Wizard

Steps  
1: Service Information  
2: Service Information (Cont.)  
3: Service Process Information

Edit the Customer Service Information New!

**WATER**

Allow Tax: No

Tax Exempt Number:

Taxable Percent: 100.00

Tax Code ID:

Tax Type:

Winter Quarter Flag: 0

Winter Quarter ID:

ERU/EDU: 0.00000

ERU Type: 0

Cash Transaction Profile ID:

Account Type: Default

Paperless Statement: No

**1: Service Information**

Status	Active
Service Active Date	10/04/2019
Finance Period	0010
Allow Finance Charges	1
Discount Code	0
Term Grace Days	0
Rate Class	01
Billing Freq	4
Lenable	1
Rolable	1
Company Number	10
Number of Units	0.00000
Category	

**2: Service Information (Cont.)**  
**3: Service Process Information**

Narrative  
These fields describe how this service is billed for this customer.

Back Next Finish

Continue entering service information, including taxability and the paperless statement setting. Then, click **Next**.



Wizard

Steps

- 1: Service Information
- 2: Service Information (Cont.)
- 3: Service Process Information

Edit the Customer Service Process Information

WATER

Allow Meter Import Yes

Allow Cash Import Yes

Allow Shutoff Yes

Shutoff Condition:

Allow Past Due Delinquency Yes

Allow Collection Yes

1: Service Information

Status	Active
Service Active Date	09/21/2018
Finance Period	0010
Allow Finance Charges	1
Discount Code	0
Term Grace Days	0
Rate Class	01
Billing Freq	4
Lienable	1
Rollable	1
Company Number	99
Number of Units	0.00000
Category	

2: Service Information (Cont.)

Allow Tax	1
Taxable Percent	0.00
Tax Code ID	
Tax Type	
Winter Qtr Flag	0
Winter Qtr ID	
ERU/EDU	0.00000
ERU Type	0
Cash Tran. Profile ID	
Account Type	Balance Forward
Paperless Statement	1

3: Service Process Information

Choose the appropriate service process information. To complete the setup of this service, click Finish.

Back Next Finish

Wizard

Steps

- 1: Choose Customer ID
- 2: Specify Information
- 3: Specify Information (Cont.)
- 4: Specify Information (Cont.)
- 5: Service Information

Select a Service to Edit the Customer Information

Services

- WATER
- POWER
- FIRE
- LIVE
- BACKER

1: Choose Customer ID

Customer ID	009966775544
-------------	--------------

2: Specify Information

First	MARK
Middle	C
Last	GREEN
Area Code 1	207
Phone Number 1	781-3236
Area Code 2	207
Phone Number 2	776-1861
Area Code 3	
Phone Number 3	
Note 1	
Note 2	
SSN	
Driver's License	
eMail	

3: Specify Information (Cont.)

C/O First	
C/O Middle	
C/O Last	
Address Line 1	
Address Line 2	
Address Line 3	
City	
State	
Zip	
Delivery Point	
Second Account Number	

4: Specify Information (Cont.)

Message 1	
Message 2	
Message 3	
Courtesy Statement	No

5: Service Information

Narrative

This information sets the activity for each service for the selected customer. This information is necessary for activity to take place for a given customer for the selected service.

NOTE: Without service settings no billing will occur for this customer.

If the customer has multiple services, click to select the next service to set up. Repeat adding service(s) to the customer. When all services have been added, click Finish.

Back Next Finish





Wizard

**Steps**

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

**Specify the Owner for this Location**

Owner ID:

**1: Enter Location ID**

Location ID	009966775544
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**2: Specify Location Information**

Book Number	0001
Cycle Number	0
Sequence Number	0.00
Carrier Route	0
Property Book	
Property Page	
Property Map	
Property Lot	
Property Sub	
Property Type	
Property Unit	
Status	Occupied

**3: Specify Location Information (Cont.)**


**6: Specify Service Information**

**7: Add Connections**

**Narrative**

The **Owner ID** is the current owner of the location.

The Owner is the default customer account responsible for all charges billed to the location.

Buttons: Back, Next, Finish

After finishing entering the customer information you are returned to the owner ID, which should default to the customer ID that you set up. Click **Next**.



### Assign the Tenant and Responsible Party for the Location

**Wizard**

**Steps**

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

**Specify the Tenant for this Location**

Tenant ID

If there is no tenant, leave blank.  
 If there is a tenant at the location, enter the existing tenant ID or click **Search** to find it.  
 Or, to create a new tenant ID, click the **Wizard** and follow the steps for Creating Customer information.  
 Then, click **Next**.

**Narrative**

The **Tenant ID** is the current tenant of the location.

The tenant will only be responsible for charges billed to this location if they have been specified as the **Billing ID** for a given service.

**1: Enter Location ID**

Location ID	009966775544
-------------	--------------

**2: Specify Location Information**

Book Number	0001
Cycle Number	0
Sequence Number	0.00
Carrier Route	0
Property Book	
Property Page	
Property Map	
Property Lot	
Property Sub	
Property Type	
Property Unit	
Status	Occupied

**3: Specify Location Information (Cont.)**

Memo	
Property ID	
Unit Number	
House Number	
Street Index	0001
Elevation	0.000
Longitude Degree	0.0000000
Latitude Degree	0.0000000
Special Condition ID	
Geographic Area ID	
Facility Type ID	

**4: Specify Owner**

Owner ID	009966775544
----------	--------------

**5: Specify Tenant**

**6: Specify Service Information**

**7: Add Connections**

Back Next

**Wizard**

**Steps**

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

**Specify the Service Information for this Location**

Services

WATER
SEWER
FIRE
LIVE
BACKER

**WATER**

Billing ID

Contact

Responsibility Code

To assign the billing ID, enter the customer ID for the owner or tenant to be billed.  
 Select the responsible party to receive the bills.  
 Then, click **Next**.

**Narrative**

The Owner of a location is responsible for the charges billed to a location for a given service. In addition, the owner is the default contact customer.

These fields enable a customer other than the owner to become the customer responsible for charges.

**Note:** Each field is unique by service.

**1: Enter Location ID**

Location ID	009966775544
-------------	--------------

**2: Specify Location Information**

Book Number	0001
Cycle Number	0
Sequence Number	0.00
Carrier Route	0
Property Book	
Property Page	
Property Map	
Property Lot	
Property Sub	
Property Type	
Property Unit	
Status	Occupied

**3: Specify Location Information (Cont.)**

Memo	
Property ID	
Unit Number	
House Number	
Street Index	0001
Elevation	0.000
Longitude Degree	0.0000000
Latitude Degree	0.0000000
Special Condition ID	
Geographic Area ID	
Facility Type ID	

**4: Specify Owner**

Owner ID	009966775544
----------	--------------

**5: Specify Tenant**

Tenant ID	
-----------	--

**6: Specify Service Information**

**7: Add Connections**

Back Next Finish



### Add Connections to the Location

Here you will add connection information describing the services to be billed at the location.

**Steps**  
 1: Enter Location ID  
 2: Specify Location Information  
 3: Specify Location Information (Cont.)  
 4: Specify Owner  
 5: Specify Tenant  
 6: Specify Service Information  
 7: Add Connections

**Add Connections to this Location Describing the Services to be Billed**

ID	Reference ID	Reference Type

**1: Enter Location ID**  
 Location ID: 009966775544

**2: Specify Location Information**  
 Book Number: 0001  
 Cycle Number: 0  
 Sequence Number: 0.00  
 Carrier Route: 0  
 Property Book:  
 Property Page:  
 Property Map:  
 Property Lot:  
 Property Sub:  
 Property Type:  
 Property Unit:  
 Status: Occupied

**3: Specify Location Information (Cont.)**  
 Memo:  
 Property ID:  
 Unit Number:  
 House Number:  
 Street Index: 0001  
 Elevation: 0.000  
 Longitude Degree: 0.000000  
 Latitude Degree: 0.000000  
 Special Condition ID:  
 Geographic Area ID:  
 Facility Type ID:

**4: Specify Owner**  
 Owner ID: 009966775544

**5: Specify Tenant**  
 Tenant ID:

**6: Specify Service Information**  
**WATER**  
 Billing ID: 009966775544  
 Responsibility Code: 0  
 Contact: 0

**7: Add Connections**

Each device for a service connection must be added separately. Click **New** to add a new device for the service connection that is not currently in inventory. Or, click **Add** to add an existing connection.

Buttons: Back, Next, Finish

**Steps**  
 1: Choose Location ID  
 2: Specify Information  
 3: Specify Information (Cont.)  
 4: Billing Information

**Edit the Information to Describe the New Connection**

Reference Type: Meter

Reference ID: 44444444

Reference Serial ID:

Primary Service Code: 1 - WATER

Billing Type ID:

Parent Connection ID:

**Fast Access Maintenance** (icon)

**1: Choose Location ID**  
 Location ID: 009966775544

**2: Specify Information**  
 Reference ID: 83333333  
 Reference Serial ID:  
 Reference Type: M  
 Service Code: 1  
 Billing Type ID:  
 Parent Connection ID:

**3: Specify Information (Cont.)**  
 Location:  
 Usage Multiplier: 0.0000  
 Reading Multiplier:  
 Pressure Zone: 0  
 Outside Identifier:  
 Radio MIU Number:  
 Sequence Code:  
 Supplier ID:  
 Line Item ID:  
 Special Condition ID:

**4: Billing Information**

The **Reference ID and Type** describes the type of Service Connection to be billed.  
 A **Reference ID** that currently exists on the system may be selected or a **New** Reference ID may be created.

Select the reference type for the connection. Enter the reference ID (meter no., trailer no., etc.). Then, click **Fast Access Maintenance** to build the device, if needed.

Buttons: Back, Next



Wizard

Steps  
1: Enter ID  
2: Specify Information

Enter the New Meter Inventory ID

Meter Inventory

1: Enter ID  
2: Specify Information

Narrative  
Enter a Meter ID that **does not exist** on the system currently.

Click **Next** to add the device to inventory.  
**Note:** In this example a meter is added.  
Other devices will have different maintenance screens, but the process is similar.

Back Next



Add the device information if adding a new device.

Wizard

Steps  
1: Enter ID  
2: Specify Information

Edit the Information to Describe the New Meter Inventory Item

1: Enter ID  
Meter ID 33333333

2: Specify Information

Primary Service Code 1 - WATER

Reading 0

Narrative  
Select the Primary Service Code and the Current Reading of the Meter.

Back Next Finish

Confirm that the primary service code for the connection is correct. Enter the reading, then click **Finish**.

Meter Inventory Maintenance

File Additional Trailers Wizards

Meter ID: 44444444 Save Search Retrieve

Not In Service

Billing Type ID: State Code: Type: Battery Installed Date:

Primary Service Code: WATER Tamper Code: Install Reading A: 0

Series Type Code ID: 0 Read Type: Install Reading B: 0

Dial Count: 0 Number of Decimals: 0 Install Reading C: 0

Outside Number: Connection State: Unlocked

Manufacturer Name: Removal Reading A: 0

Model: Removal Reading B: 0

Serial Number: Removal Reading C: 0

Meter Size: Reset Date:

Secondary Meter Installed Date:

Maintenance Code: Inventory Removed Date:

Radio MIU Number: Last Test Date:

Purchase Date: Purchase Price: 0.00 Last Test Status: Unknown

Message Code(s):

Memo:

Enter the device information such as manufacturer name, meter size and MIU number. Click **Save** and then, click **Close** X.

Service Code	Reading	Date	Us	Y Charges
WATER	0	09/20/2018		0.00



Wizard

**Steps**

- 1: Choose Location ID
- 2: Specify Information**
- 3: Specify Information (Cont.)
- 4: Billing Information

**Edit the Information to Describe the New Connection**

Reference Type: Meter

Reference ID: 44444444

Reference Serial ID:

Primary Service Code: - WATER

Billing Type ID:

Parent Connection ID:

**1: Choose Location ID**

Location ID	009966775544
-------------	--------------

**2: Specify Information**

Reference ID	33333333
Reference Serial ID	
Reference Type	M
Service Code	1
Billing Type ID	
Parent Connection ID	

**3: Specify Information (Cont.)**

Location	
Usage Multiplier	0.00000
Reading Multiplier	
Pressure Zone	0
Outside Identifier	
Radio MIU Number	
Sequence Code	
Supplier ID	
Line Item ID	
Special Condition ID	

**4: Billing Information**

**Narrative**

The Reference ID and Type describes the type of Service Connection to be billed.

A Reference ID that currently exists on the system may be selected or a New Reference ID may be created.

Click Next.

Back Next

Wizard

**Steps**

- 1: Choose Location ID
- 2: Specify Information
- 3: Specify Information (Cont.)**
- 4: Billing Information

**Edit the Information to Describe the New Connection**

Location:

Usage Multiplier: 0.00000

Reading Multiplier ID:

Pressure Zone: 0

Outside Identifier:

Radio MIU Number:

Sequence Code:

Supplier ID:

Line Item ID:

Special Condition ID:

Inspection Code: No Appointment Required

Connection Size:

Read Book:

Removed On / Installed On Date:

**1: Choose Location ID**

Location ID	009966775544
-------------	--------------

**2: Specify Information**

Reference ID	44444444
Reference Serial ID	
Reference Type	M
Service Code	1
Billing Type ID	
Parent Connection ID	

**3: Specify Information (Cont.)**

**4: Billing Information**

Enter the connection information for billing the device. Then, click Next.

Back Next



**Wizard**

**Steps**

- 1: Choose Location ID
- 2: Choose Service Connection ID
- 3: Edit Information
- 4: Edit Information

**Edit the Service Connection Information**

Services

WATER

SEWER

FIRE

LINE

BACKER

WATER

Transaction Profile ID

Quantity

ERU Base

ERU

**1: Choose Location ID**

Location ID	000000105105
-------------	--------------

**2: Choose Service Connection ID**

Connection ID	00000000042760
Reference ID	55555555
Reference Serial ID	
Reference Type	M
Reading Multiplier	
Usage Multiplier	0.00000

**3: Edit Information**

Parent Connection ID	
Location	
Billing Type ID	
Usage Multiplier	0.00000
Reading Multiplier	
Pressure Zone	0
Outside Identifier	
Radio MIU Number	
Sequence Code	
Supplier ID	

**4: Edit Information**

**Narrative**

The **Transaction Profile ID** describes how this Service Connection is billed with respect to a given Service.

**Note:** Each Service has a unique Tranprofile ID.

Enter the billing transaction profile ID for the highlighted service.

**Wizard**

**Steps**

- 1: Choose Location ID
- 2: Specify Information
- 3: Specify Information (Cont.)
- 4: Billing Information

**Edit the Service Information to Describe Billing for this Connection**

Services

WATER

SEWER

FIRE

LINE

BACKER

SEWER

Transaction Profile ID

Quantity

ERU Base

ERU

**1: Choose Location ID**

Location ID	000000105105
-------------	--------------

**2: Specify Information**

Reference ID	55555555
Reference Serial ID	
Reference Type	M
Service Code	1
Billing Type ID	
Parent Connection ID	

**3: Specify Information (Cont.)**

Location	
Usage Multiplier	0.00000
Reading Multiplier	
Pressure Zone	0
Outside Identifier	
Radio MIU Number	
Sequence Code	
Supplier ID	
Line Item ID	
Special Condition ID	
Inspection Code	0
Connection Size	
Read Book	
Removed On / Installed O	

**4: Billing Information**

The 1 describes how this service Connection is billed with respect to a given Service.

**Note:** Each Service has a unique Tranprofile ID.

If the connection has more than 1 service, for example, a water meter that also bills for sewer, then click the next service and enter the billing transaction profile ID for the selected service.  
Then, click **Finish**.



Wizard

Steps

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

Add Connections to this Location Describing the Services to be Billed

ID	Reference ID	Reference Type	
00000000042758	44444444	M	NEW

New Add

If there is another meter or device to add for this service or another service, click **New** or **Add** and repeat the steps for adding service connections to the location. Then, click **Finish**.

Add or Create Connection

Back Next Finish

1: Enter Location ID

Location ID 009966775544

2: Specify Location Information

Book Number 0001  
 Cycle Number 0  
 Sequence Number 0.00  
 Carrier Route 0  
 Property Book  
 Property Page  
 Property Map  
 Property Lot  
 Property Sub  
 Property Type  
 Property Unit  
 Status Occupied

3: Specify Location Information (Cont.)

Memo  
 Property ID  
 Unit Number  
 House Number  
 Street Index 0001  
 Elevation 0.000  
 Longitude Degree 0.0000000  
 Latitude Degree 0.0000000  
 Special Condition ID  
 Geographic Area ID  
 Facility Type ID

4: Specify Owner

Owner ID 009966775544

5: Specify Tenant

Tenant ID

6: Specify Service Information

WATER

Billing ID 009966775544  
 Responsibility Code 0  
 Contact 0

7: Add Connections

Wizard

Steps

- 1: Enter Location ID
- 2: Specify Location Information
- 3: Specify Location Information (Cont.)
- 4: Specify Owner
- 5: Specify Tenant
- 6: Specify Service Information
- 7: Add Connections

Add Connections to this Location Describing the Services to be Billed

ID	Reference ID	Reference Type	
00000000042758	44444444	M	NEW

New Add

Click Finish.

Narrative

Add or Create Service Connections for this Location.

Back Next Finish

1: Enter Location ID

Location ID 009966775544

2: Specify Location Information

Book Number 0001  
 Cycle Number 0  
 Sequence Number 0.00  
 Carrier Route 0  
 Property Book  
 Property Page  
 Property Map  
 Property Lot  
 Property Sub  
 Property Type  
 Property Unit  
 Status Occupied

3: Specify Location Information (Cont.)

Memo  
 Property ID  
 Unit Number  
 House Number  
 Street Index 0001  
 Elevation 0.000  
 Longitude Degree 0.0000000  
 Latitude Degree 0.0000000  
 Special Condition ID  
 Geographic Area ID  
 Facility Type ID

4: Specify Owner

Owner ID 009966775544

5: Specify Tenant

Tenant ID

6: Specify Service Information

WATER

Billing ID 009966775544  
 Responsibility Code 0  
 Contact 0

7: Add Connections





## Use EDIFICE Inquiry to Confirm Account Setup

After completing all of the steps of the Create Location wizard the Inquiry screen displays with the new account information loaded. Use the Inquiry screen to double-check your work and to confirm that you have set up all the information needed to begin billing this new account: the location, the customer, the services and connections.

The screenshot displays the EDIFICE software interface with several panels open. The top navigation bar includes menus for File, View, Daily Work, Reports, Analysis, Period End Work, Processes, Service Management, Tools, Utilities, Images, Windows, Help, and Web Links. The main workspace is divided into several sections:

- Location Information:** Shows details for Location 00006666666, including Book, Cycle, Sequence (126.00), Route, Status (Occupied), and Facility Type. The address is listed as 123 MAIN ST, FAIRCITY, ME 04105.
- Customer Information:** Shows details for Customer 00006666666, including First Name / MI (MARK C), Last / Business Name (GREEN), and Mailing Address (123 MAIN, FAIRCITY, ME).
- Billing Information Table:**

Service	Last Read Date	Reading	Usage	Quantity	Transaction Profile
WATER	10/04/2019	0.00000	0.00000	1	000000001011 - BS 5/8" QUARTERLY
SEWER	10/04/2019	0.00000	0.00000	1	10524003
- Connection / Device Information:** Shows Meter 88888888 and Billing Type Pressure Zone.
- Services:** Shows an active service for WATER.

Overlaid on the right side of the screenshot is a text box with the following text:

Use the Inquiry screen to confirm that you have set up the location, customer, services and connections correctly for this account.