# 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** ⊕ Add New Location .

Click **Create Location Wizard.**
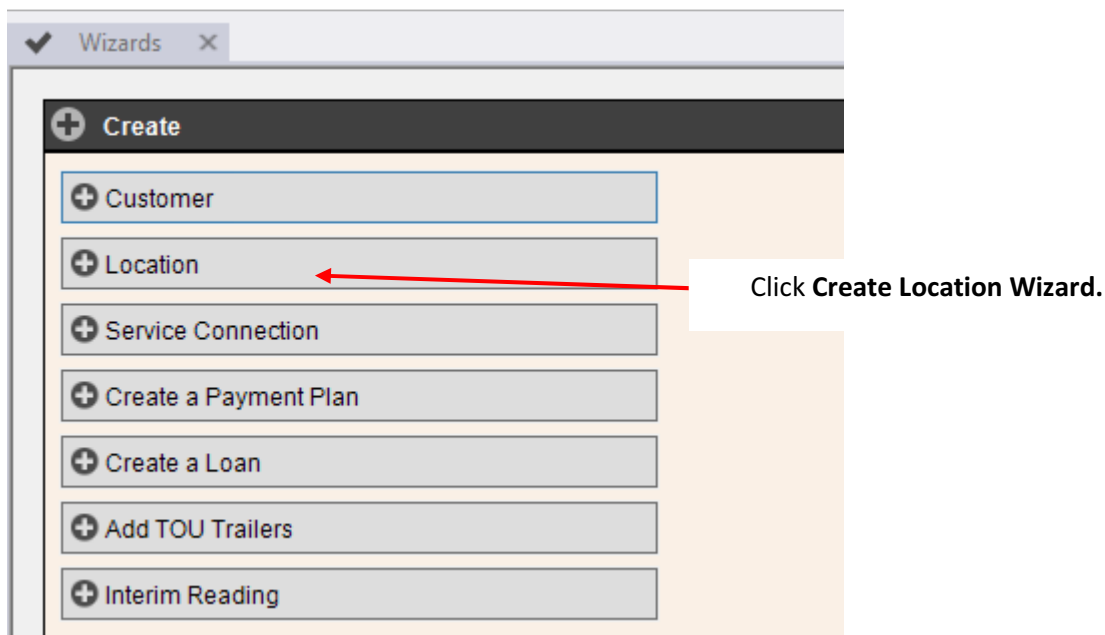
Create Location

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

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

Field	Value
Memo	
Property ID	
Elevation	0.000
Longitude	0.0000000
Latitude	0.0000000
Unit Number	
House Number	
Street Index	0001 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

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

Narrative

These fields describe the physical location of the property.

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

[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 9966775544

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** 🦋 .

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.

[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.

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

Narrative

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

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

Narrative

This name will print on any billing forms.

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	123 MAINE STREET
Address Line-2	
Address Line-3	
City	FAIRCITY
State, Zip	ME 04105
Delivery Point	
Second Account Number	

Narrative

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

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

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

[Back] [Next] [Finish]

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	No

Narrative

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

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	

[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.

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

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

Wizard

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

Narrative

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

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
Lienable	1
Rollable	1
Company Number	10
Number of Units	0.00000
Categotry	

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

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

Back   Next   Finish

Wizard

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

Edit the Customer Service Process Information New!

WATER

Allow Meter Import	Yes
Allow Cash Import	Yes
Allow Shutoff	Yes
Shutoff Condition:	
Allow Past Due Delinquency	Yes
Allow Collection	Yes

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

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

[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
- SEWER
- FIRE
- LINE
- BACKER

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**.

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.

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

[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

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.**

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.

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.**

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.

Add Connections to the Location

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

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.

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.

Wizard

Steps	Enter the New Meter Inventory ID	1: Enter ID
1: Enter ID		2: Specify Information
2: Specify Information		

Meter Inventory   44444444

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.

Narrative

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

Back   Next

Add the device information if adding a new device.

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

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

Wizard

Steps	Edit the Information to Describe the New Connection	1: Choose Location ID	
1: Choose Location ID		Location ID	009966775544
2: Specify Information		2: Specify Information	
3: Specify Information (Cont.)		Reference ID	33333333
4: Billing Information		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	

Reference Type: Meter

Reference ID: 44444444

Reference Serial ID:

Primary Service Code: 1 - WATER

Billing Type ID:

Parent Connection ID:

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	Edit the Information to Describe the New Connection	1: Choose Location ID	
1: Choose Location ID		Location ID	009966775544
2: Specify Information		2: Specify Information	
3: Specify Information (Cont.)		Reference ID	44444444
4: Billing Information		Reference Serial ID	
		Reference Type	M
		Service Code	1
		Billing Type ID	
		Parent Connection ID	
		3: Specify Information (Cont.)	
		4: Billing Information	

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:

Narrative

These fields describe information about the Service Connection.

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

Back   Next

Enter the billing transaction profile ID for the highlighted service.

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.**

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.**

Click **Finish.**

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.

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