



# How to Add Multiple Accounts

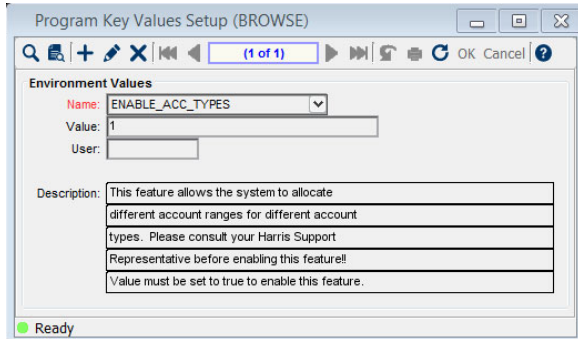
*Harris Computer Systems*

*V1.0 03/21/2017*

## Add Multiple Accounts

This enables you to add accounts using a template that has all the services defined, you can create an account as your template or you can use an existing account you will need to define this account and occupant code in your Account Type Set ups

You need to have the PKV ENABLE\_ACC\_TYPE set to turn on the functionality



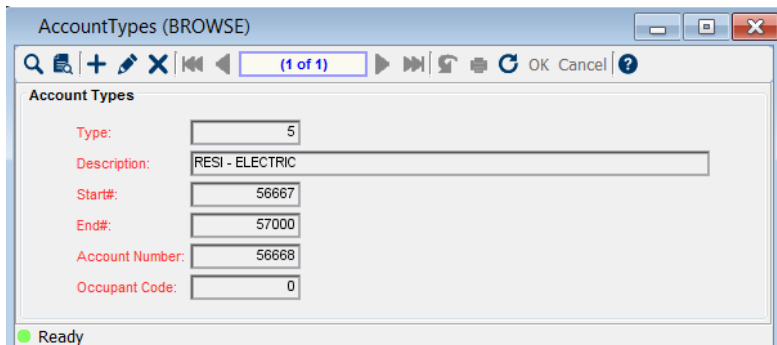
## Create Account Type

Setups> Additional Information > Account Type Setup

Set up Account Type

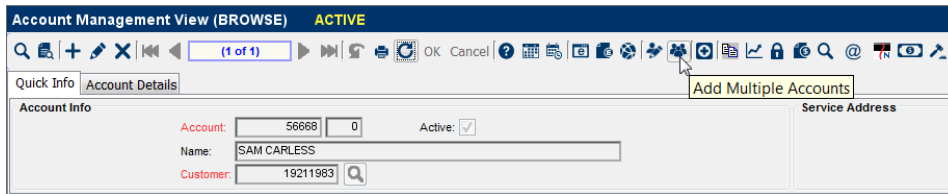
1. Start# - starting account number
2. End# - ending account number
3. Account Number / Occupant Code – This is the account that will be used as a template

By defining the start and end of account number, you are creating accounts within the number range. The next available account number within the range is used, incremented by 1 for each of the accounts you want to create. If there is no account available in the range, no accounts are created.

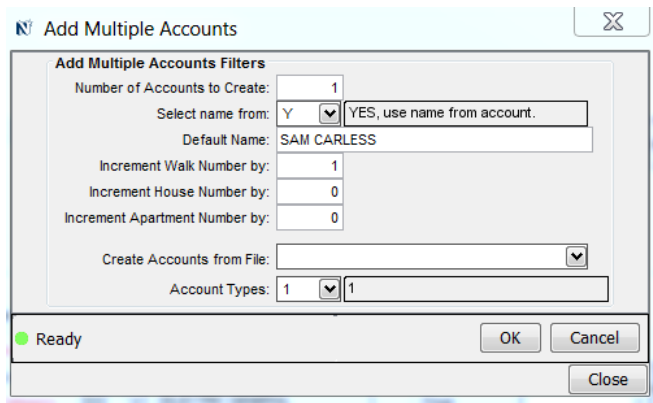


Find the account that you set as your template in Account Gateway

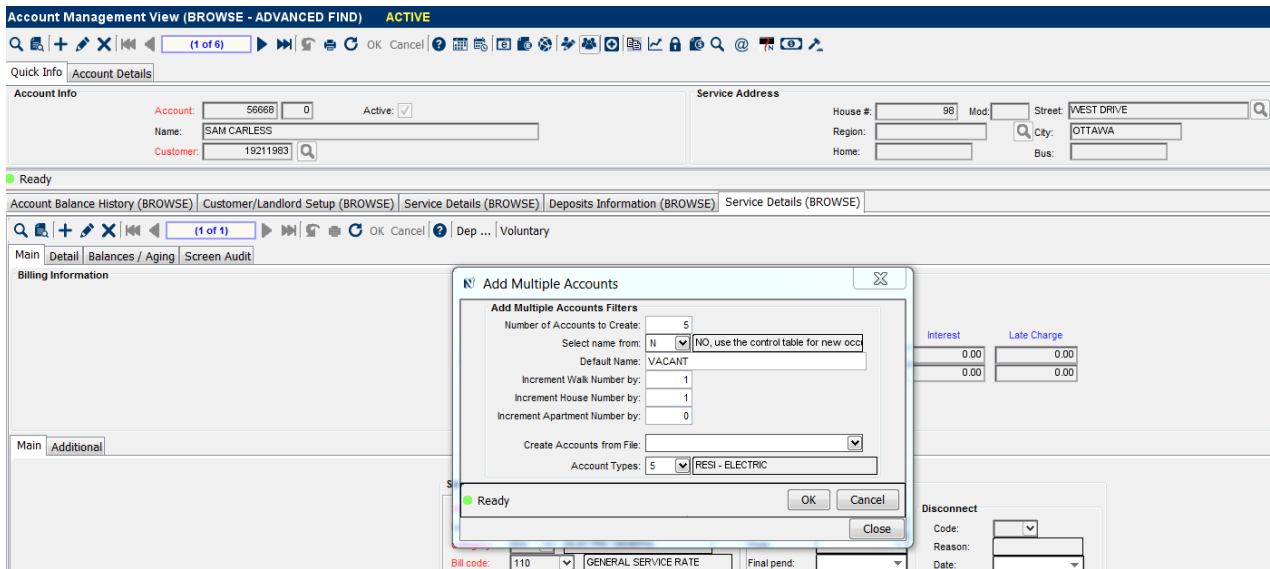
Click on the Add Multiple Accounts Icon



This will then give you a pop up box



1. Enter number of Accounts to create
2. You can select N (Vacant) if you do not want all the accounts to create with the same name
3. Select how you want the walk and house number incremented by
4. Select the Account Type (template to be used)



Pop up will advise how many accounts were created > click ok

Account Management View (BROWSE) ACTIVE

Quick Info Account Details

Account Info: Account: 56668 0 Active:  Name: SAM CARLESS Customer: 19211983

Service Address: House #: 99 Mod: Street: WEST DRIVE Apt: City: OTTAWA State: ON

Ready

Account Balance History (BROWSE) Customer/Landlord Setup (BROWSE) Service Details (BROWSE) Deposits Information (BROWSE) Service Details (BROWSE)

Main Detail Balances / Aging Screen Audit

Billing Information

	Overdue	Interest	Late Charge
ELECTRIC	0.00	0.00	0.00
	0.00	0.00	0.00

NorthStar Process Completed 5 Account(s) Created

Main Additional

Service Information

Service: E ELECTRIC Location: I In City Category: EG ELECTRIC GENERAL Bill code: 110 GENERAL SERVICE RATE Bill period: 1 MONTHLY BILLING NAIC code: 0 UNKNOWN

No units: 1 Start: 03-21-2017 Final: Final pend: Inactive from: Inactive to:

Disconnect Code: Reason: Date: Reconnect:

Exemptions Late pay: N Interest: N Estimate: N Disconnect: Reason: Taxes: Reason:

Notices: 1 2 3 Current: Prior: Deposits: On file: 0.00 Required: 0.00 To collect: 0.00

Readings Last read: Last billed: Amount: Last payment: Amount: Due date:

You can then run an advanced find to search for the accounts that were created

Sam (56674-0)

Account Management View (BROWSE - ADVANCED FIND) ACTIVE

Quick Info Account Details

Account Info: Account: 56674-0 Name: SAM CARLESS Customer: 19211983

Service Address: House #: 99 Mod: Street: WEST DRIVE Apt: City: OTTAWA State: ON

Ready

Account Balance History (BROWSE) Customer/Landlord Setup (BROWSE) Service Details (BROWSE) Deposits Information (BROWSE) Service Details (BROWSE)

Main Detail Balances / Aging Screen Audit

Billing Information

F/A	Acc#	Occ.	Name	Hous...	Mod	Unit	Street
A	56674	0	VACANT	99			WEST DRIVE
A	56675	0	VACANT	100			WEST DRIVE
A	56676	0	VACANT	101			WEST DRIVE
A	56677	0	VACANT	102			WEST DRIVE
A	56678	0	VACANT	103			WEST DRIVE

Double click to jump to the record

Current	Overdue	Interest	Late Charge
0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00

Main Additional