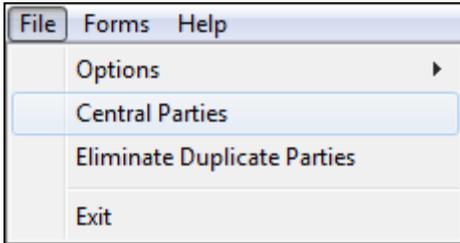


CENTRAL PARTIES

The TRIO Central Party system is designed as a way to link one party, or customer, with multiple items (parcels, accounts, vehicles, etc.) in the system. The major benefit to this system is that name changes, address updates and contact information only have to be made once in a single location which subsequently updates all of the items that party is linked to in all of the TRIO applications such as Motor Vehicle, Real Estate and Utility Billing. Central Parties allows for up to date address information to be shared across multiple departments instantaneously. The system also allows override addresses to be stored in case information needs to be mailed to a different location for a specific application or for a certain time of the year in the case of seasonal residents.

Accessing Central Parties – Global

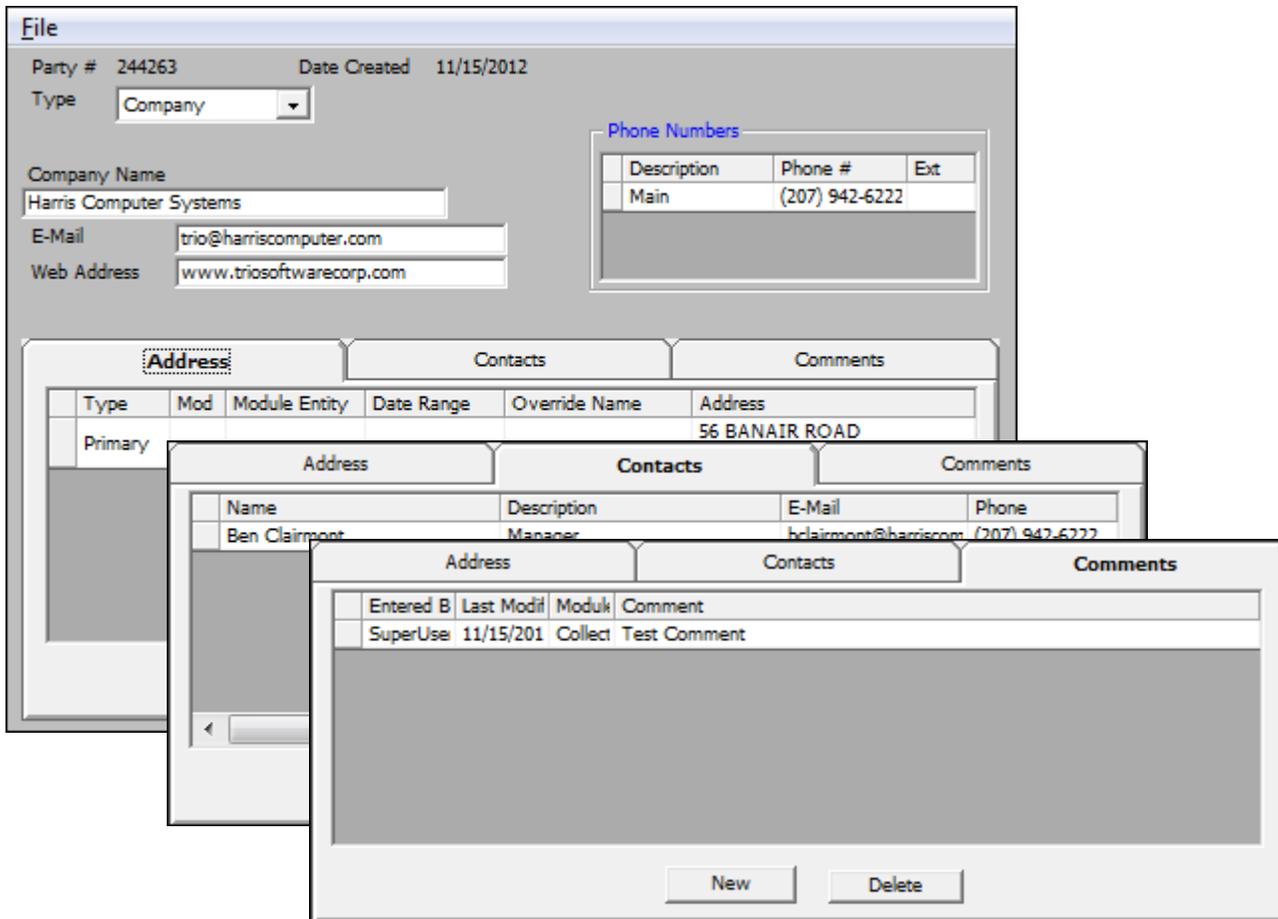


To access central parties from **any** module, click on the **File** menu in the top left of the program and select **Central Parties** as shown to the left. This will open the **Central Party Search Screen** as shown below.

A screenshot of the 'Central Party Search Screen'. It features a 'File' menu bar at the top. Below it are three search input fields: 'Name' (containing 'har'), 'Address' (containing 'ban'), and 'E-Mail' (containing 'trio'). To the right of these fields are two buttons: 'Search' and 'New Customer'. Below the search fields is a table with three columns: 'Name', 'Address', and 'E-Mail'. The table contains one row of data.

Name	Address	E-Mail
Harris Computer Systems	56 BANAIR ROAD BANGOR, ME 04401	trio@harriscomputer.com

To search for an existing party; enter search criteria into any or all of the three search fields - Name, Address or E-Mail – click the **Search** button. The system performs partial match searches and will display any parties matching the entered criteria in the section below the three search fields. Double click on a party to open it or click the **New Customer** button to add a party to the system.



Double clicking on a search result or clicking the **New Customer** button on the search screen will open the **Party Master** screen, shown above. This screen is used to enter or update all of the information about a Central Party:

- The **Type** field tells the system is the party is an **Individual** or a **Company**. Changing this setting will change the format of the Name field from a set of **First Name, MI, Last Name, Suffix** fields to a single **Company Name** field.
- To add a phone number, click into the phone number area and press the **Insert** key on the keyboard.
- To add a new address, a contact or a comment, make sure that the appropriate tab is selected and click **New** at the bottom of the screen. An address, contact or comment can be removed by selecting the record and clicking the **Delete** button.

Once all of the information has been entered, user the **F12** key to save the record.

Addresses

There are two types of addresses that can be assigned to a party; **Primary** and **Override**.

The **Primary** address assigned to a customer will be the default address for all modules.

Selecting **Override** in the **Type** field will cause the system to use that address for either the selected module or for the selected date range in the case of seasonal individuals. The **Account** field is not used at this time.

Once an address has been entered, click **OK** to save the record.

The screenshot shows the 'Address' form with the following fields and values:

- Type: Override
- Override Name: WINTER ADDRESS
- Address 1: 777 LUCKY ROAD
- Address 2: (empty)
- Address 3: (empty)
- C / S / Z: LAS VEGAS, NV, 12345
- Country: (empty)
- Use this address ONLY for:
 - Module: Collections
 - Account: (empty)
 - Seasonal:
 - Date Range: November 1 To March 31
- Comments: (empty)

The screenshot shows the 'Contact' form with the following fields and values:

- Name: Ben Clairmont
- Description: Manager, Support and Professional Services
- E-Mail: bclairmont@harrisworld.com
- Comments: (empty)
- Phone Numbers table:

Description	Phone #	Ext
- Buttons: Ok, Cancel

Contacts

Contacts keep track of information related to people associated to the party. As many contacts can be added as needed. Once the contact has been entered, click **OK** to save the record.

Comments

An unlimited number of comments can be added to the party. Each comment displays the TRIO user that created the comment as well as the date that the comment was last modified.

Once the comment has been entered, click **OK** to save the record.

The screenshot shows the 'Comment' form with the following fields and values:

- Created By: SuperUser
- Last Modified: 11/15/2012
- Module: Real Estate
- Comments: Test Comment
- Buttons: Ok, Cancel

Applying a Party

Owner	0			
2nd Owner	0			

When accessing any module that stores a name and address such as Real Estate or Utility Billing, the screen will show a field for the party number followed by three icons.

Click the **Magnifying Glass** icon to search for a party. This will open the **Party Search** screen from which an existing party can be found and selected, or a new party can be

added following the steps above. Click the **Pencil** icon to open the **Party Master** screen and edit the selected party. Click the red **X** to remove the selected party from the parcel or account.

Once a party has been selected, the name and address will be displayed on the parcel or account.

If the displayed information is not correct, click on the **Pencil** icon to edit the party information or click the red **X** to remove the party from the account.

Owner	244246			
	SMITH, AARON A SR			
2nd Owner	0			
Address	1 MAIN ST TOWN, ME 04401			

Motor Vehicle

Registrant(s)				
N I	0			
N N				
N N				

When accessing Central Party information in Motor Vehicle, there is a search and edit option for all three registrant fields.

There is no option to delete a name from a registration. To change owners, select the search option and select the correct name. To edit, select the pencil. If a party was accidentally added to the second or third registrant field, change the registrant code back to an **N**.

Once a party has been added or selected, it will populate the party number field and display the name on the Registration screen.

Motor Vehicle does not use the address from the Central Party and this will need to be filled in manually. This is due to how the registration information is sent and received from the State.

Registrant(s)				
N I	244246			AARON A SMITH SR
N N				
N N				