**Connect Master Record to Reference APO**

**Why connect master records to Reference APO:**

Master records will be “Active” records in the Accela system for the life of the installed system, or until it becomes decommissioned. It will be easier going forward to get the current Owner in the years to come as the renewal period rolls around and letters need to be sent to the current Owner when these records are connected to Reference APO.

**Some Master records will already be connected to Reference APO in these scenarios:**

* Counties with a data conversion (> 100 systems):
	+ Some records will already be connected to Reference APO because they are converted from the Permit created in Accela.
* Master records automatically created from CSC Issued in workflow from Permits created in Accela.
* Cloning from a Permit that was created in Accela.
* Using the “New” button to create the Master record.

**Master records that are most likely to be disconnected from Reference APO:**

* Counties with a data conversion (> 100 systems):
	+ Permits that were converted (created in the system used before Accela), are most likely to not be connected to Reference APO.
* Master records automatically created from CSC Issued in workflow from Permits that were converted (created in the system used before Accela).
* Cloning from a Permit that was converted (created in the system used before Accela).

**Time commitment:**

It takes about 1.5 minutes to connect each Master record to Reference APO, following along with these steps.

**Steps:**

1. Under ***Onsite Reports*** > generate report called ***Onsite Annual Service System Audit***.

The date parameters are looking at the date that the install Permit record was Finaled. Enter a date that will go far enough back to retrieve all Permits records. In this example, I used 1/1/1900:

 

1. There are two sections in this report: 1) ***Permits that are missing the Master record***; and 2) ***Master records missing the Reference Parcel***. You should pay attention to the second section.



1. Search for the ***Master*** record > navigate to the ***Address*** page.

***Note***: Even though the report is showing Master records that are missing the Reference Parcel, they will most likely be missing the ***Reference Address*** and ***Reference Owner*** too. Starting from the ***Address*** is going to be the easiest method for connecting.

In most cases, there will already be an ***Address*** listed. Click on the ***Street #*** hyperlink to see the details.



Update the ***Primary*** value to ***No*** > click ***Save***. This will allow the ***Reference Address*** added in the next step to be the Primary address.



Click ***Look Up*** > search for the ***Reference Address*** > ***checkmark*** the address > click ***Select***.

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A popup window will appear. ***IMPORTANT***: Checkmark ***Select All*** to also select the ***Reference Parcel*** and ***Reference Owner***.



At this point, the Master record has been ***successfully*** connected to the ***Reference APO***! But the previous Address, Parcel, and Owner should also be removed.

On the ***Address*** page > select the previous ***Address*** > click ***Delete***.



***Tip***: If you don’t know which address is now the correct address, it is the address that shows ***Get Parcel***. The other address should be deleted.



Navigate to the ***Owner*** page. There will likely be two ***Owners***. Remove the previous ***Owner***.



***Tip***: If you don’t know which Owner is now the correct Owner, you can open the ***Launchpad*** > open the ***Reference Parcel*** page > search for the ***Reference Parcel*** and note the ***Owner*** that is associated.



Navigate to the ***Parcel*** page. There will likely be two ***Parcels***. Remove the previous ***Parcel***.



***Tip***: If you don’t know which Parcel is now the correct Parcel, you can open the ***Launchpad*** > open the ***Reference Address*** page > search for the ***Reference Address*** and note the ***Parcel*** that is associated.

