

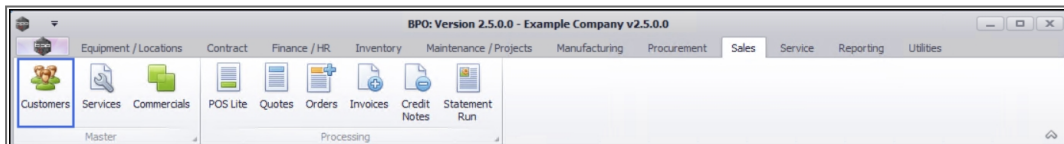
We are currently updating our site; thank you for your patience.

SALES

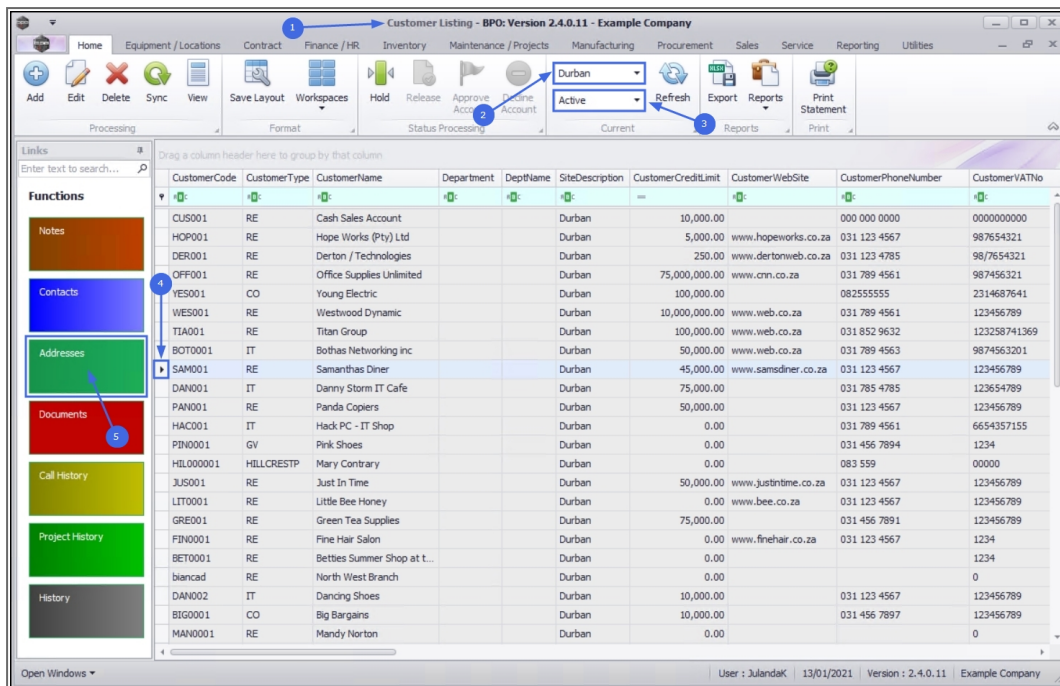
CUSTOMERS – ADDRESSES

- ✓ The **Billing Address(BILL)** is the address where invoices are sent to and there must be one, and only one billing address set up for the Customer.
- ✓ The **Shipping Address** is where the machine is located or where services are required. If you are using TechConnect, this is the **address where the Technician goes** to render services when he accepts a call.
- ✓ The **Physical Address** is where the company is physically located.

Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer you wish to work with can be located.
 - The example has **Durban** selected.
3. Select the **Status**.
 - The example has **Active** selected.
4. Select the **row** of the **customer** to whom you wish to **add** an **address** to.
5. Click on the **Addresses** tile.



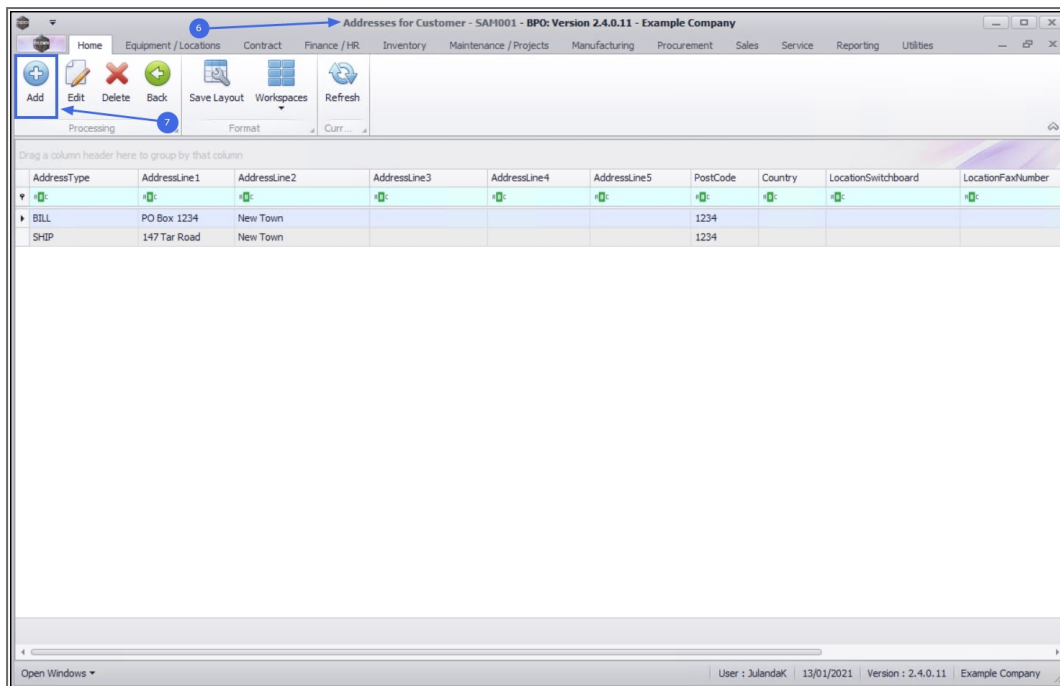
6. The **Addresses for Customer** screen will be displayed.

ADD CUSTOMER ADDRESS

7. Click on **Add**.



Short cut key: Right click to display the **Process** menu list. Click on **Add**.



AddressType	AddressLine1	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode	Country	LocationSwitchboard	LocationFaxNumber
BILL	PO Box 1234	New Town				1234			
SHIP	147 Tar Road	New Town				1234			

8. The **Address Maintenance for Customer** screen will be displayed.

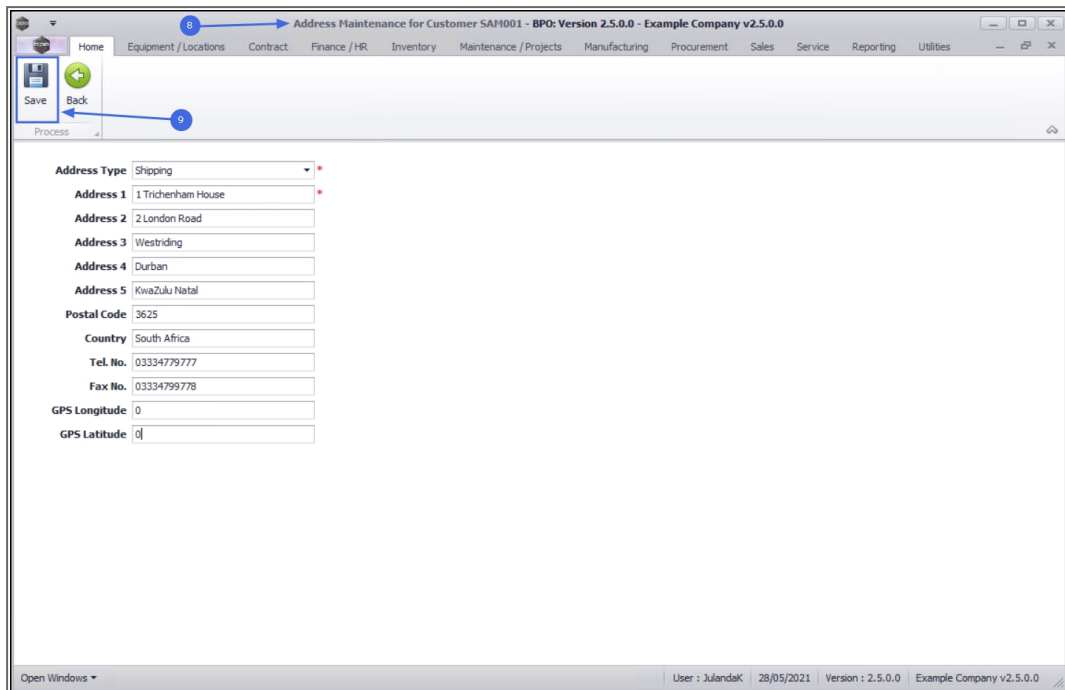
- **Address Type:** Click on the **drop-down arrow** to select the **Address Type**.



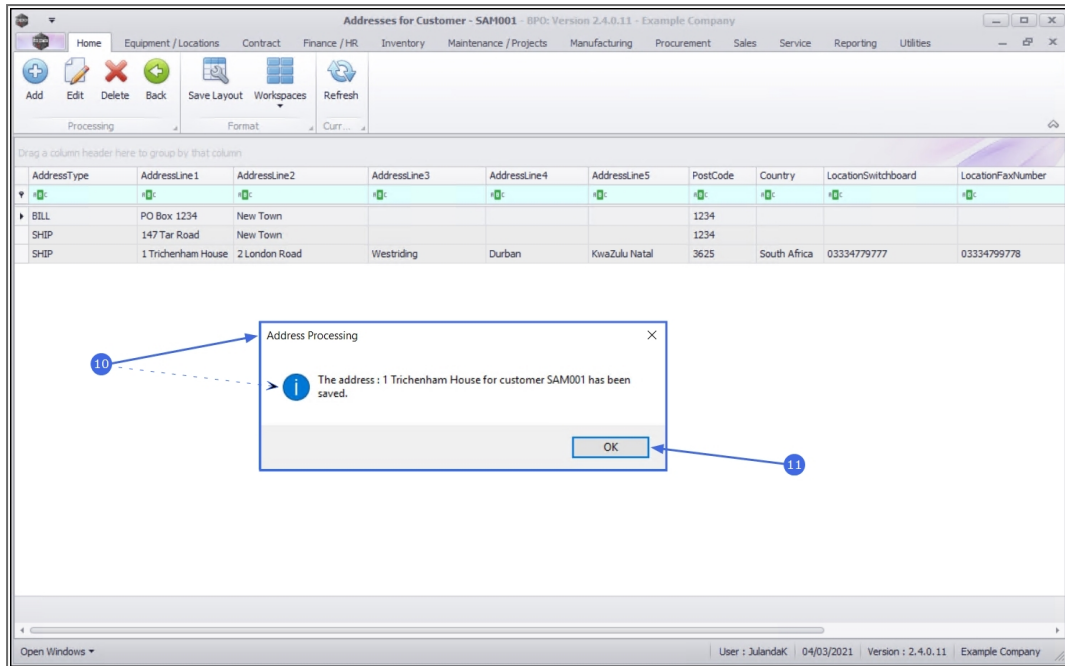
Note that there can only be one Billing address. You can have multiple Shipping addresses.

- **Address Details:** Enter the Address details in Address lines 1 - 5.
- **Postal Code:** This line has been reserved for the postal code only.
- **Country:** The country is a non-mandatory line and you may choose to exclude it from your address.
- **Tel No:** Enter the telephone number for the Customer.
- **Fax No:** Enter the fax number for the Customer.
- **GPS Longitude and GPS Latitude:** Enter the GPS details for the Customer if available.

9. When you have finished filling in the address details, click on **Save**.

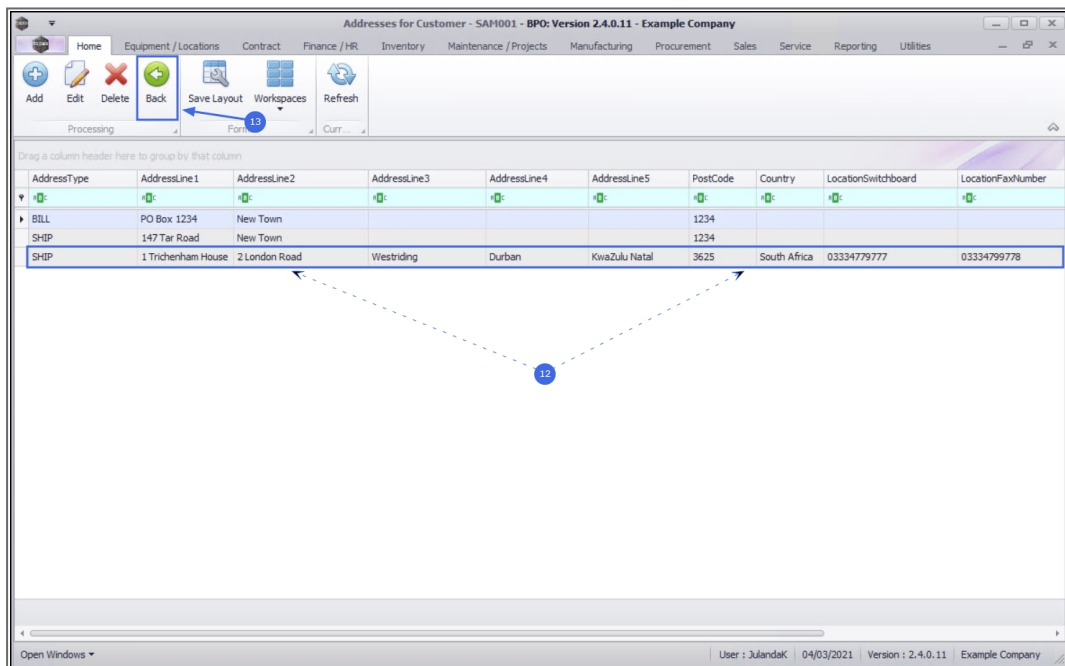


10. An **Address Processing** message box will pop up informing you that;
- **The address : [address] for customer [customer code] has been saved.**
11. Click on **OK** to proceed.



12. The newly added address can now be **viewed** in the **Addresses for Customer** screen.

13. Click on **Back** to return to the **Customer Listing** screen.

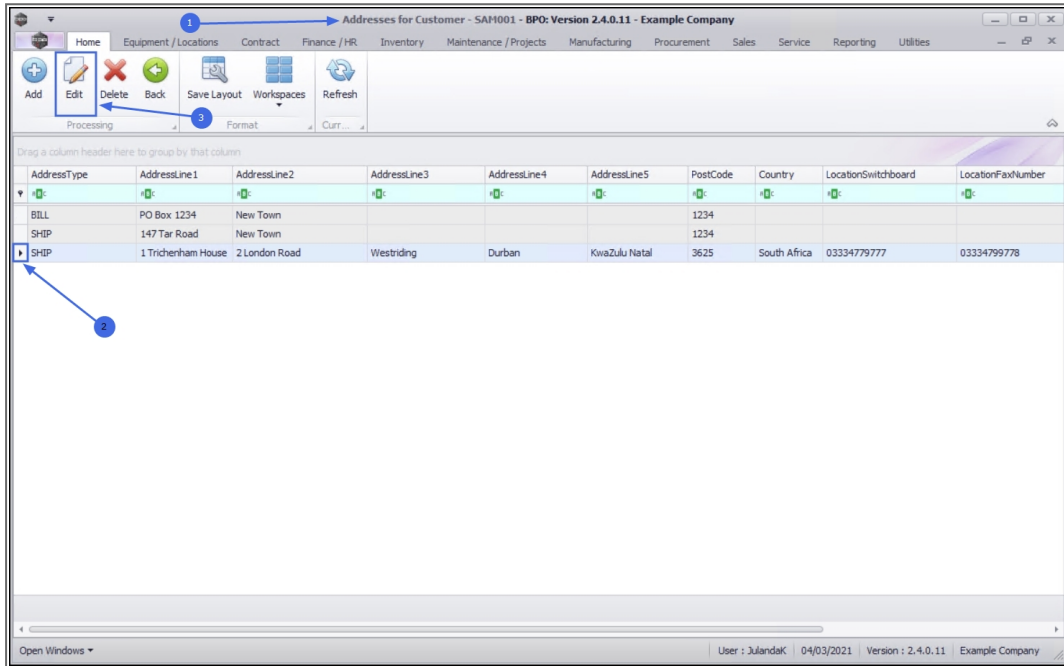


EDIT CUSTOMER ADDRESS

1. From the **Addresses for Customer** screen,
2. Select the **row** of the **address** you wish to **edit**.
3. Click on **Edit**.

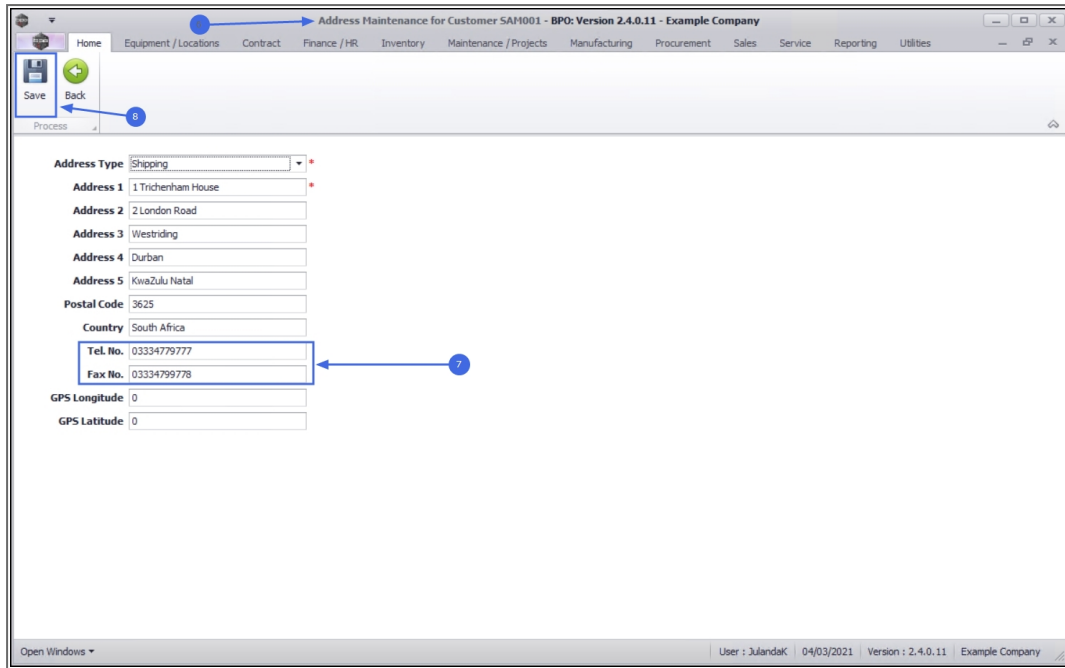


Short cut key: Right click to display the **Process** menu list. Click on **Edit**.



4. When you receive the **Address** message confirming;
 - **Are you sure you want to edit the address, [address], for [customer]?**
5. Click **Yes** to proceed.

6. The **Address Maintenance for Customer** screen will be displayed.
7. Make the required changes to the Customer Address.
 - The example has the **Tel No.** and **Fax No.** highlighted to be changed.
8. Click on **Save**.



Address Maintenance for Customer SAM001 - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Address Type: Shipping

Address 1: 1 Trichenham House

Address 2: 2 London Road

Address 3: Westriding

Address 4: Durban

Address 5: KwaZulu Natal

Postal Code: 3625

Country: South Africa

Tel. No.: 03334779777

Fax No.: 03334779778

GPS Longitude: 0

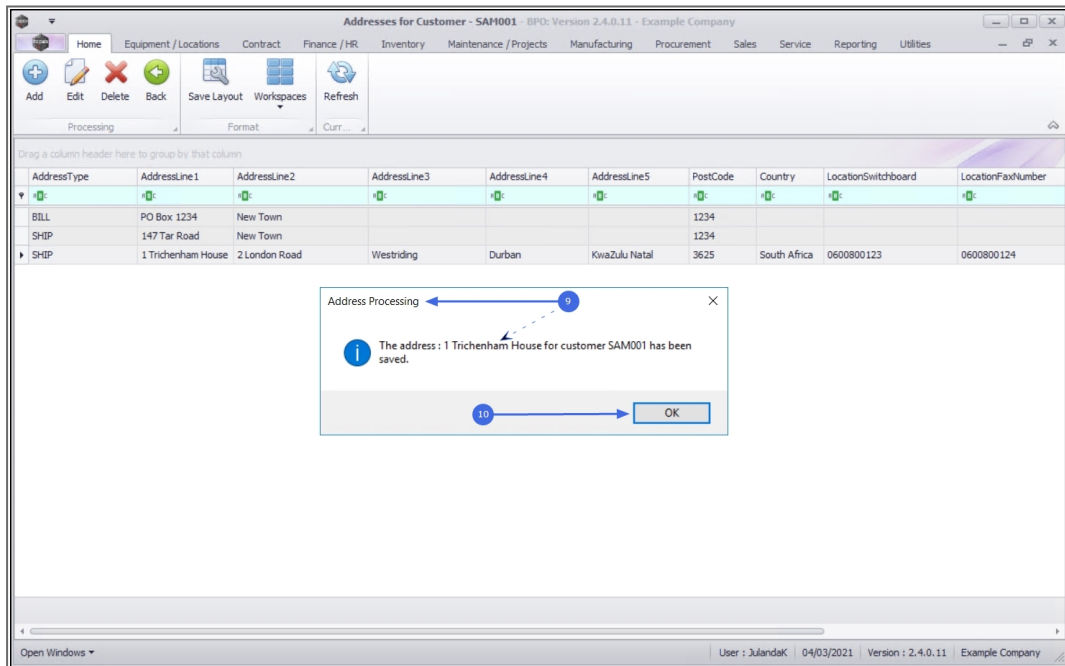
GPS Latitude: 0

Open Windows

User: JulandaK | 04/03/2021 | Version: 2.4.0.11 | Example Company

9. When you receive the **Address Processing** message to confirm that;
- The address: [address] for customer [customer code] has been saved.

10. Click on **OK**.



Addresses for Customer - SAM001 - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Refresh

Processing Format Curr...

Drag a column header here to group by that column

AddressType	AddressLine1	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode	Country	LocationSwitchboard	LocationFaxNumber
BILL	PO Box 1234	New Town				1234			
SHIP	147 Tar Road	New Town				1234			
SHIP	1 Trichenham House	2 London Road	Westriding	Durban	KwaZulu Natal	3625	South Africa	0600800123	0600800124

Address Processing

The address: 1 Trichenham House for customer SAM001 has been saved.

OK

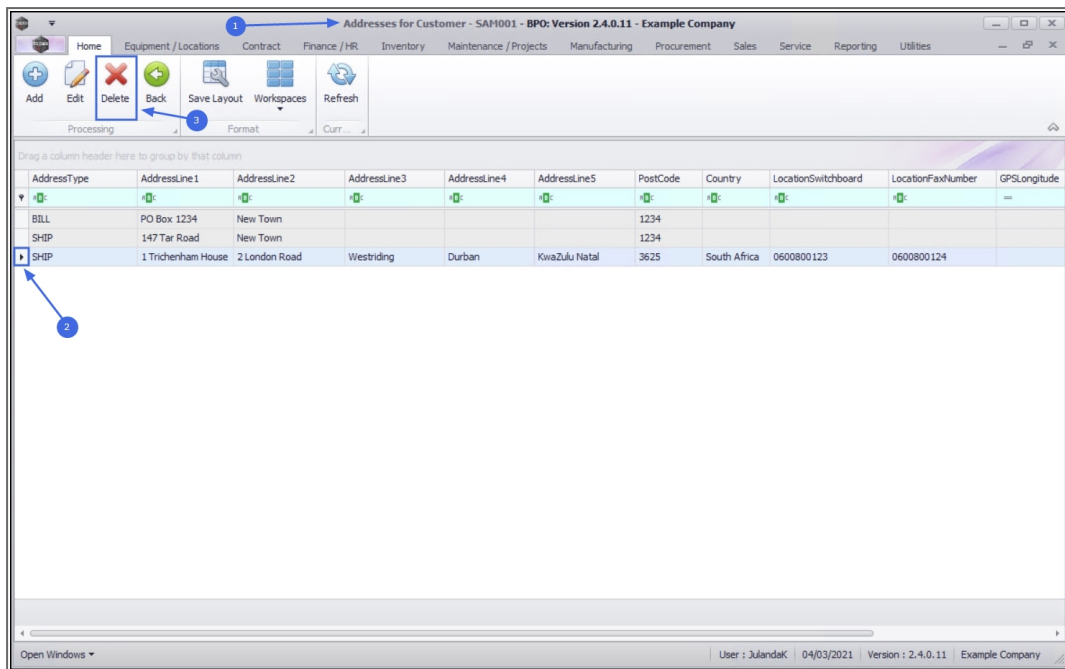
Open Windows

User: JulandaK | 04/03/2021 | Version: 2.4.0.11 | Example Company

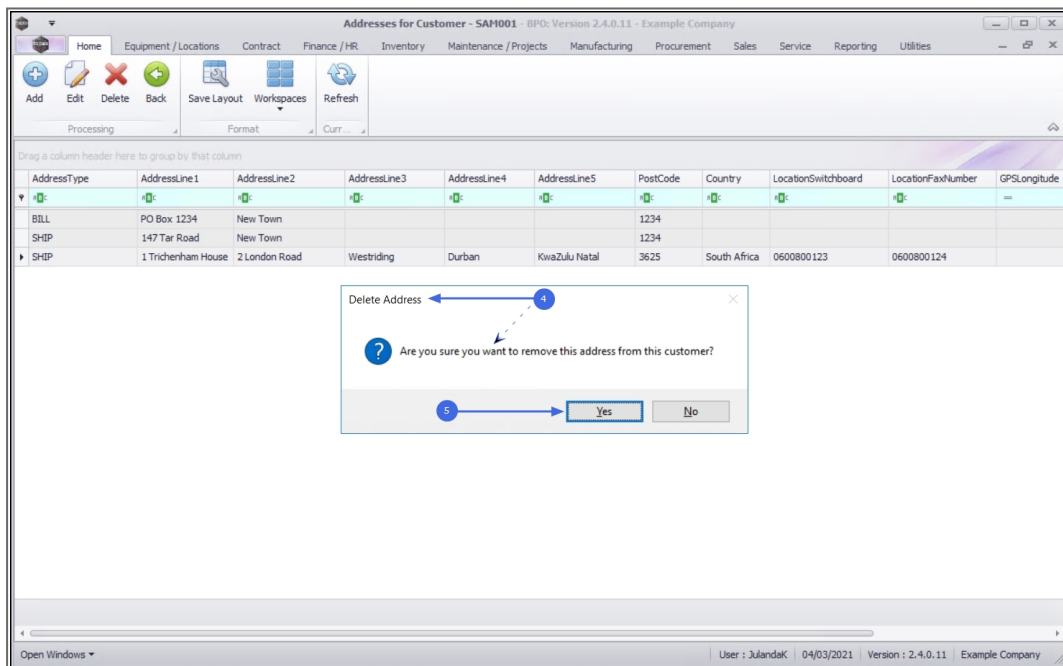
-
- Addresses for Customer - SAP001 - BPO: Version 2.4.0.11 - Example Company
- Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities
- Add Edit Delete Back Save Layout Workspaces Refresh
- Processing Form 12 Curr...
- Drag a column header here to group by that column
- | AddressType | AddressLine1 | AddressLine2 | AddressLine3 | AddressLine4 | AddressLine5 | PostCode | Country | LocationSwitchboard | LocationFaxNumber | GPSLongitude |
|-------------|--------------------|---------------|--------------|--------------|---------------|----------|--------------|---------------------|-------------------|--------------|
| ▼ BILL | PO Box 1234 | New Town | | | | 1234 | | | | |
| SHIP | 147 Tar Road | New Town | | | | 1234 | | | | |
| ▶ SHIP | 1 Trichenham House | 2 London Road | Westriding | Durban | KwaZulu Natal | 3625 | South Africa | 0600800123 | 0600800124 | |
- 11
- Open Windows ▼ User : julandaK 04/03/2021 Version : 2.4.0.11 Example Company

1. From the **Addresses for Customer** screen,
2. Select the **row** of the customer **address** you wish to **delete**.
3. Click on **Delete**.

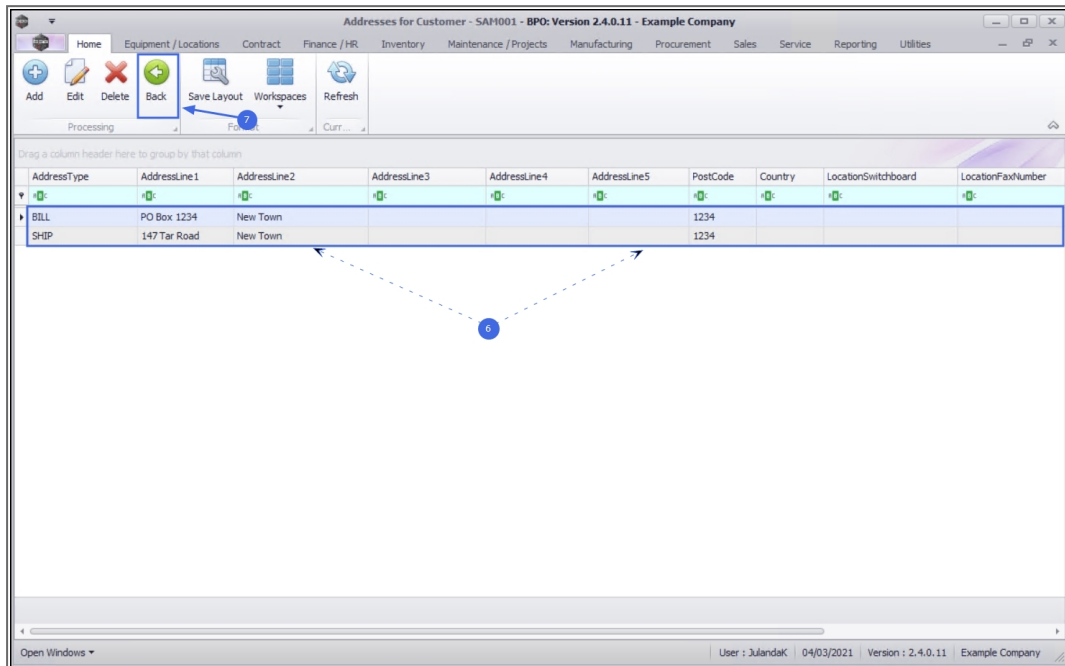




4. When you receive the **Delete Address** message to confirm;
 - **Are you sure you want to remove this address from this customer?**
5. Click on **Yes** if you are certain about your selection.



6. The address has now been **deleted** from the **Addresses for Customer** screen.
7. Click on **Back** to return to the **Customer** listing screen.



MNU.061.003

