# SALES
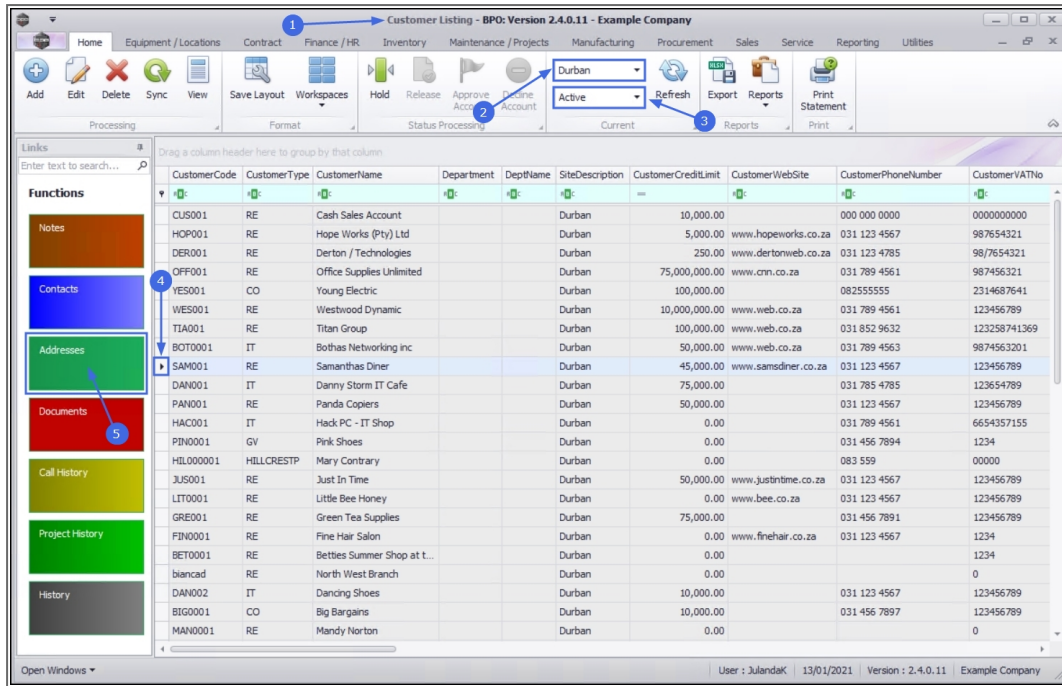
CUSTOMERS – ADDRESSES

✅ The **Billing Address(BILL)** is the address where invoices are sent to and there must be one, and <u>only one</u> 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*
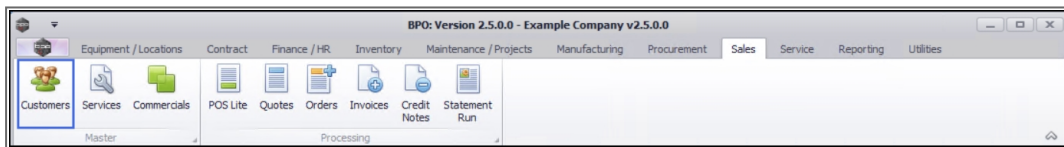
1. The *Customer Listing* screen will be displayed.
2. Select the *Site* where the Customer you wish to work with can be located.
   - The example has *Durban* selected.
3. Select the *Status*.
   - The example has *Active* selected.
4. Select the *row* of the *customer* to whom you wish to *add* an *address* to.

5. Click on the *Addresses* tile.

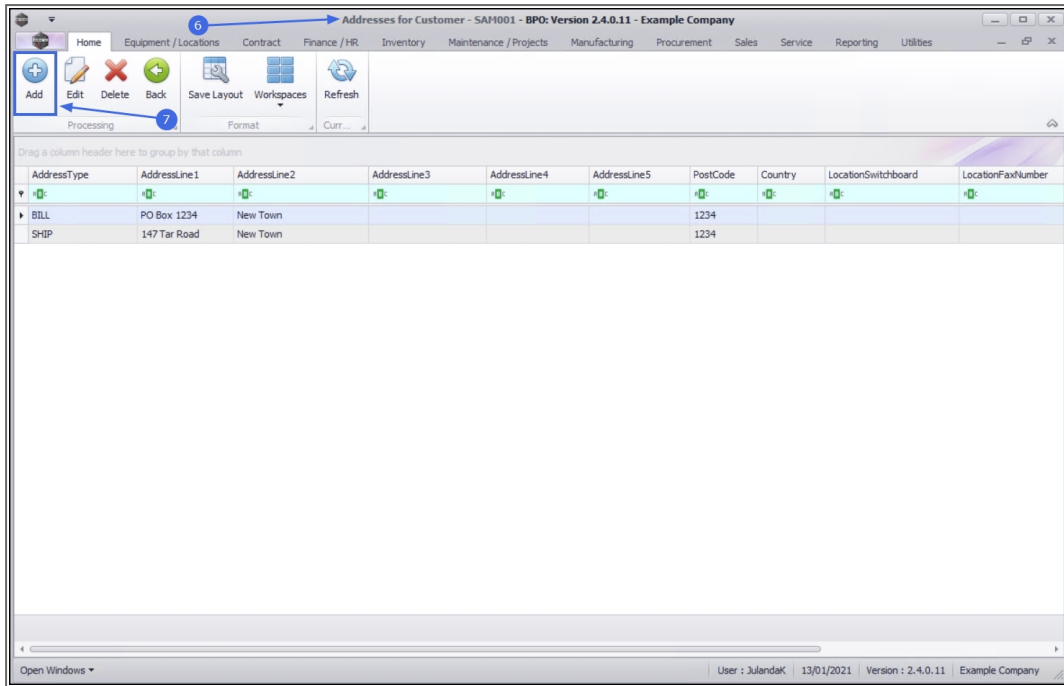6. The *Addresses for Customer* screen will be displayed.

ADD CUSTOMER ADDRESS

7. Click on *Add*.

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

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.

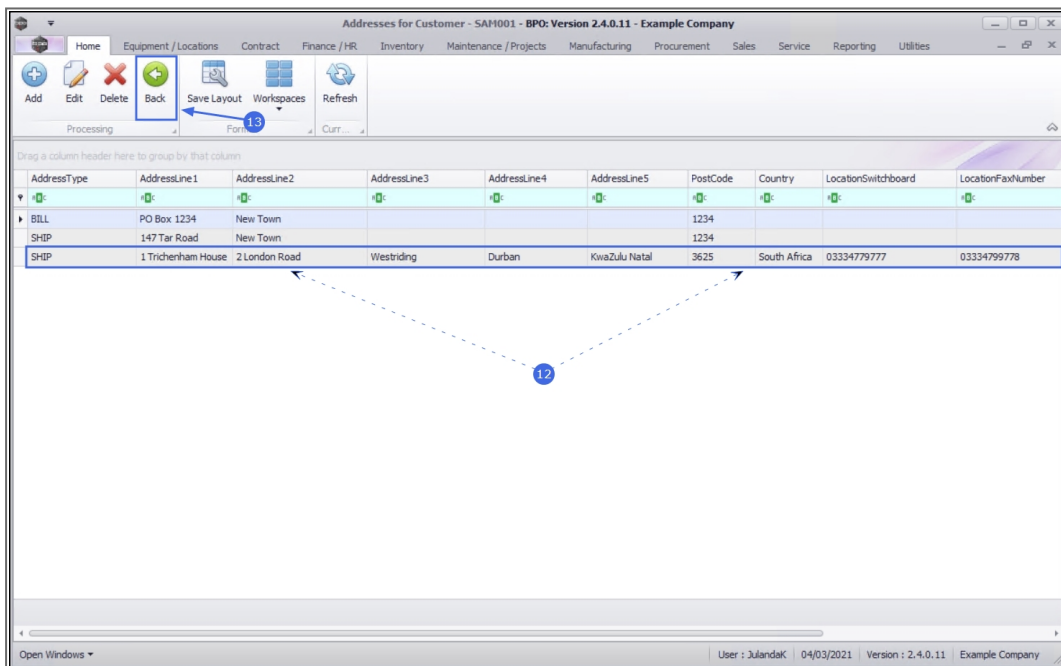9. When you have finished filling in the address details, click on *Save.*
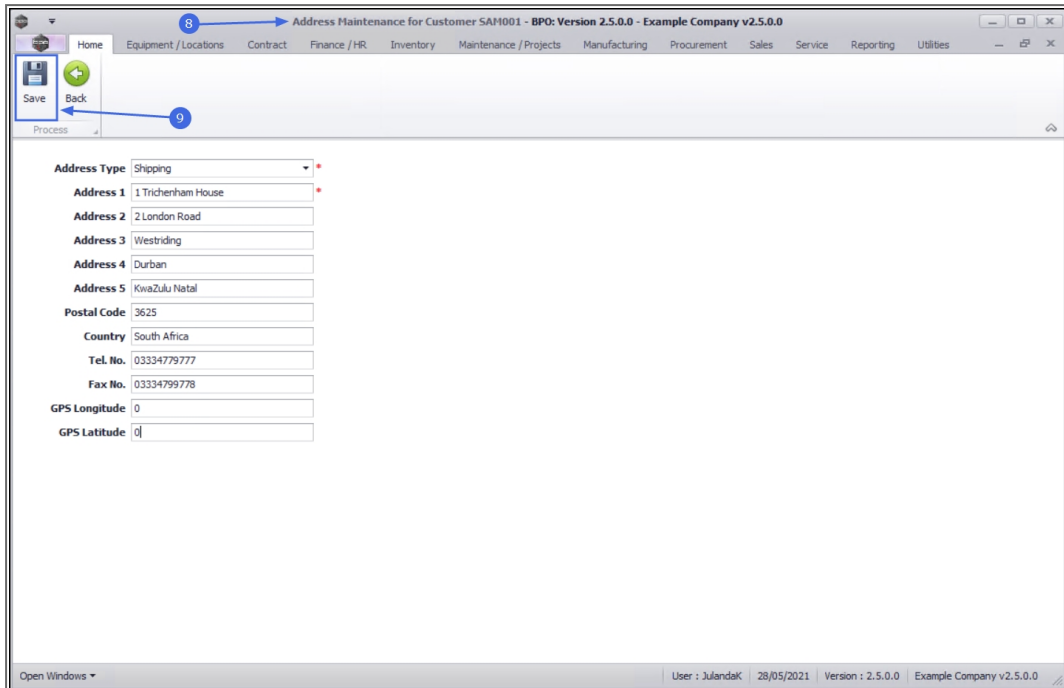
10. An *Address Processing* message box will pop up informing you that;
    - *The address : [address] for customer [customer code] has been saved.*
11. Click on *OK* to proceed.
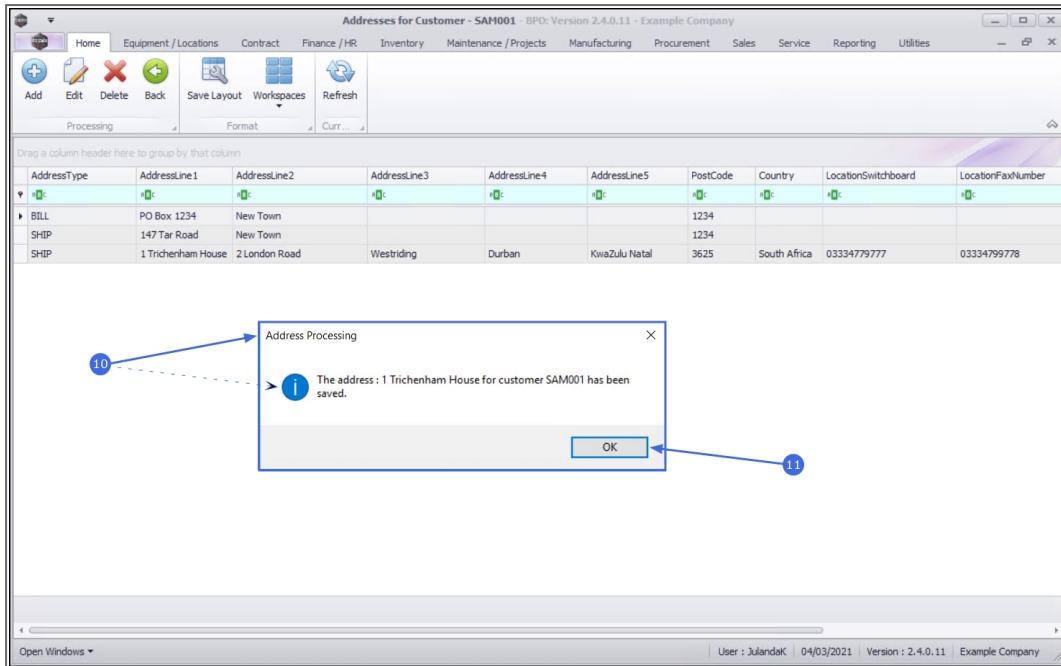
12. The newly added address can now be **viewed** in the *Addresses for Customer* screen.

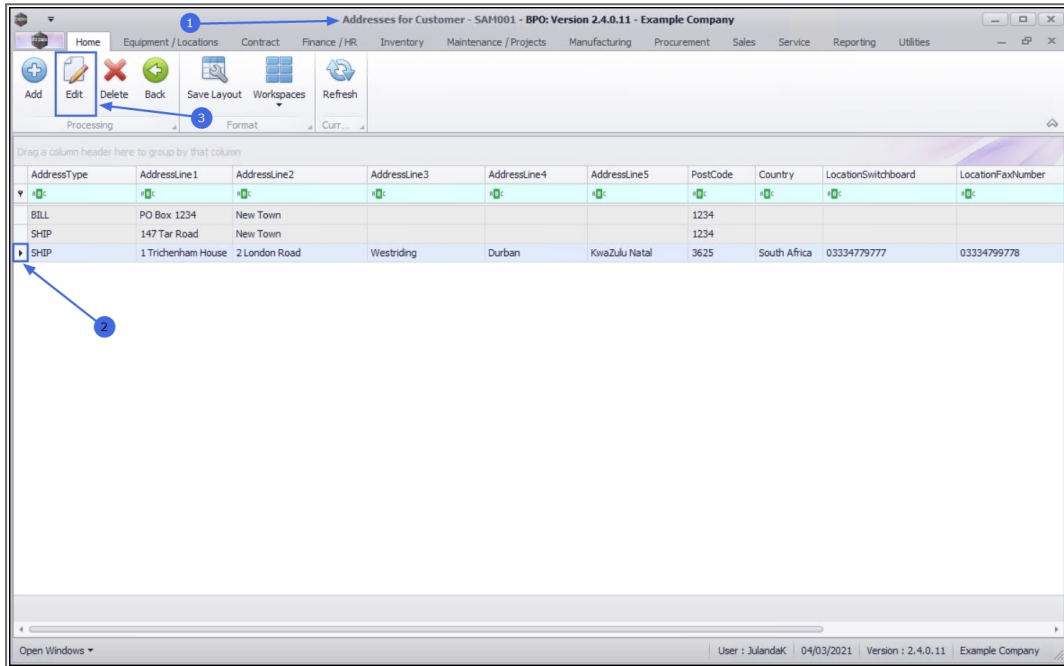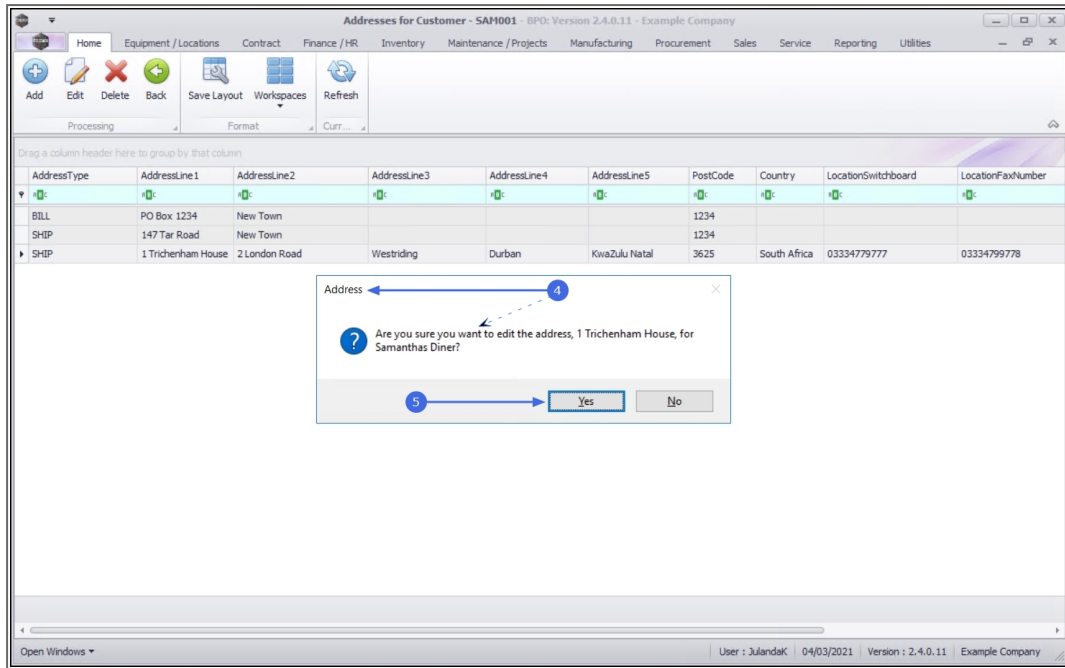13. Click on *Back* to return to the *Customer Listing* screen.

EDIT CUSTOMER ADDRESS

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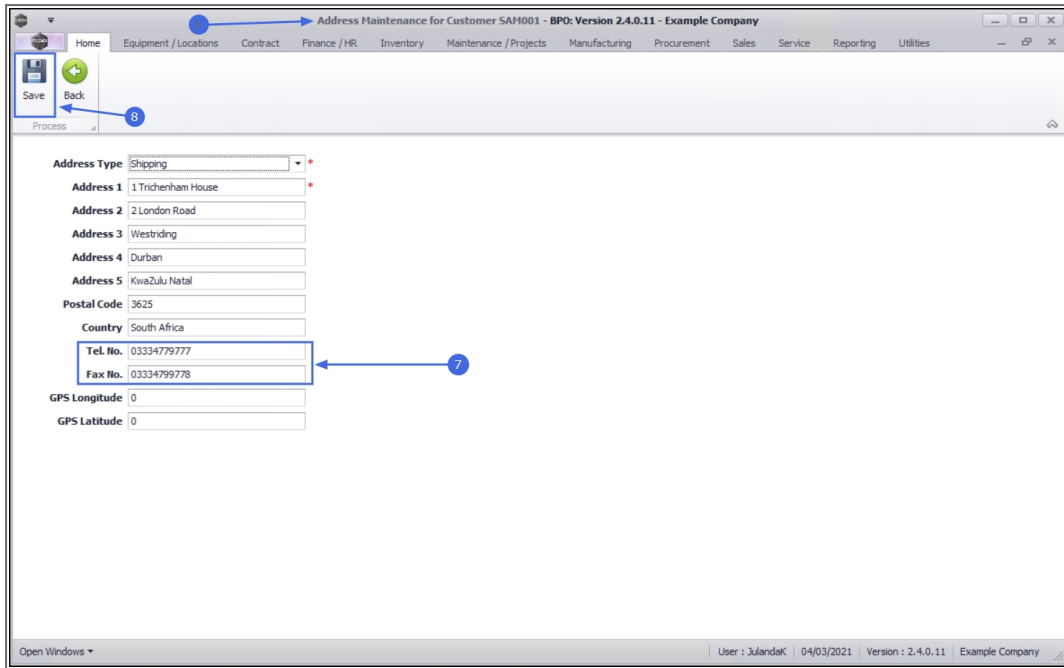2. Select the *row* of the *address* you wish to *edit*.
3. Click on *Edit*.

> 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]?*
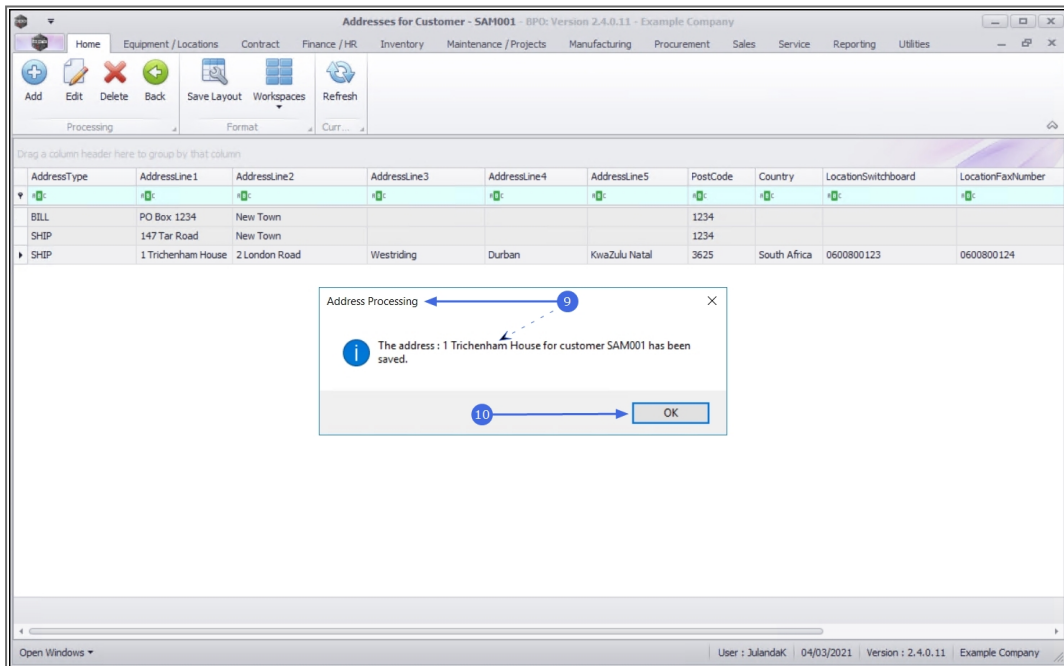5. Click *Yes* to proceed.

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
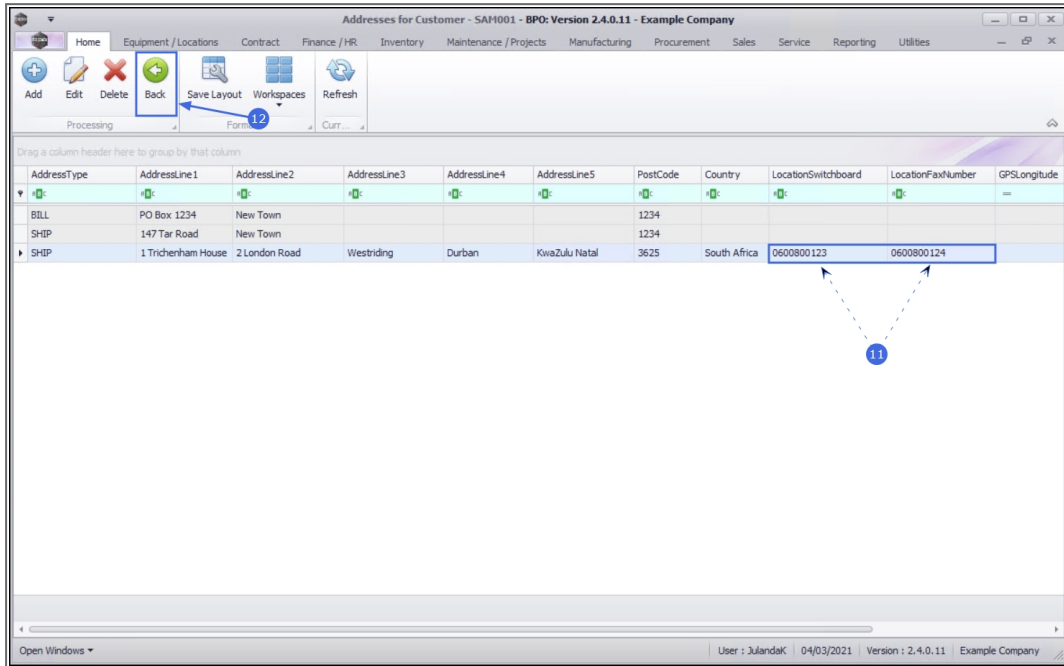   changed.

8. Click on **Save**.

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**.

11. The changes can now be *viewed* in the *Addresses for Customer* screen.

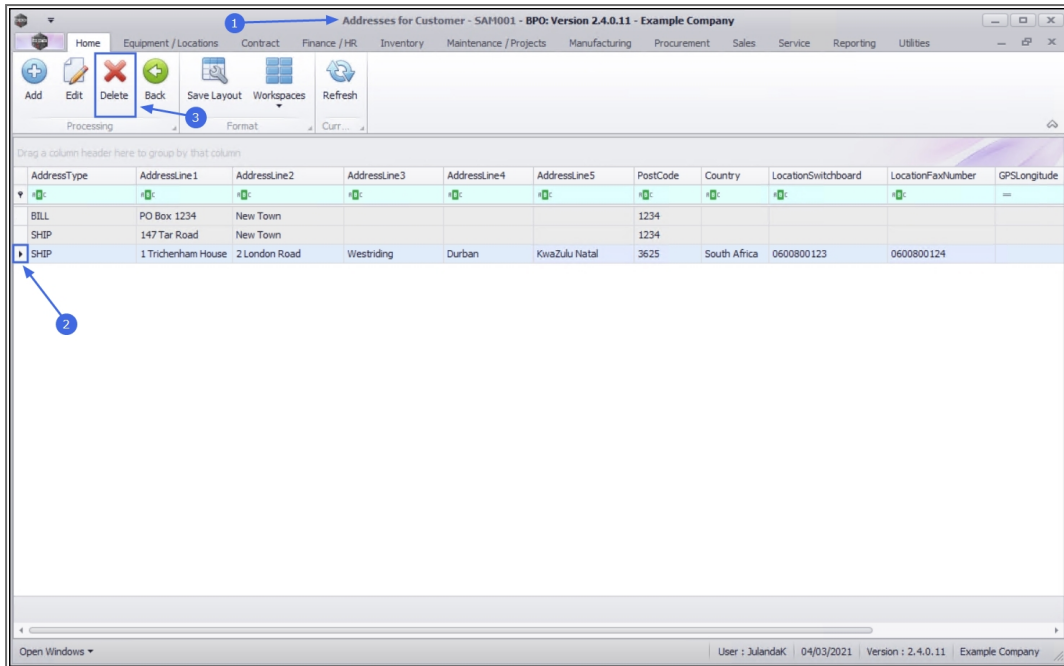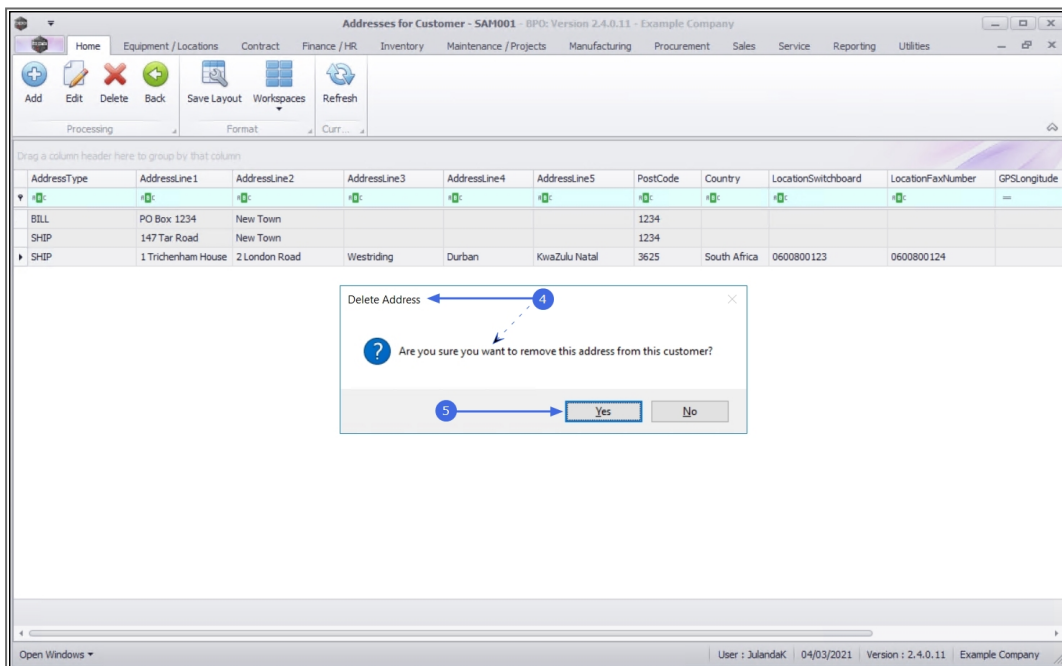12. Click on Back to return to the Customer listing screen.

DELETE CUSTOMER ADDRESS

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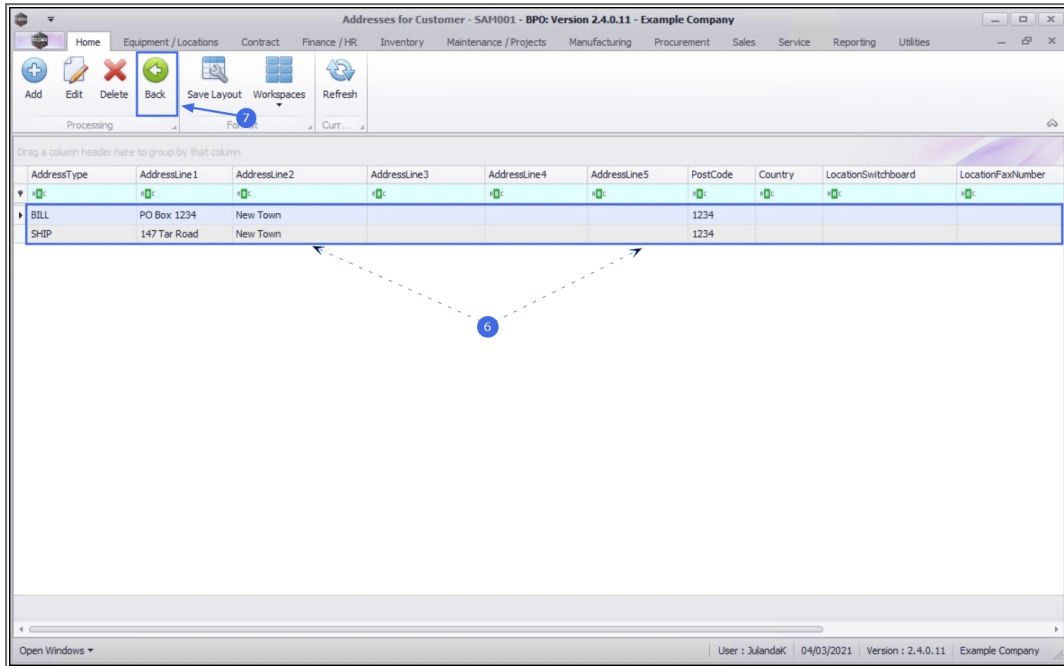3. Click on *Delete*.

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

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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