




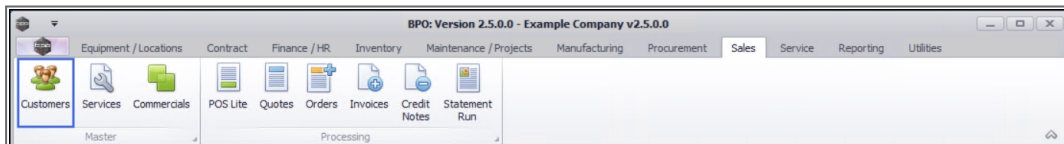
We are currently updating our site; thank you for your patience.

SALES

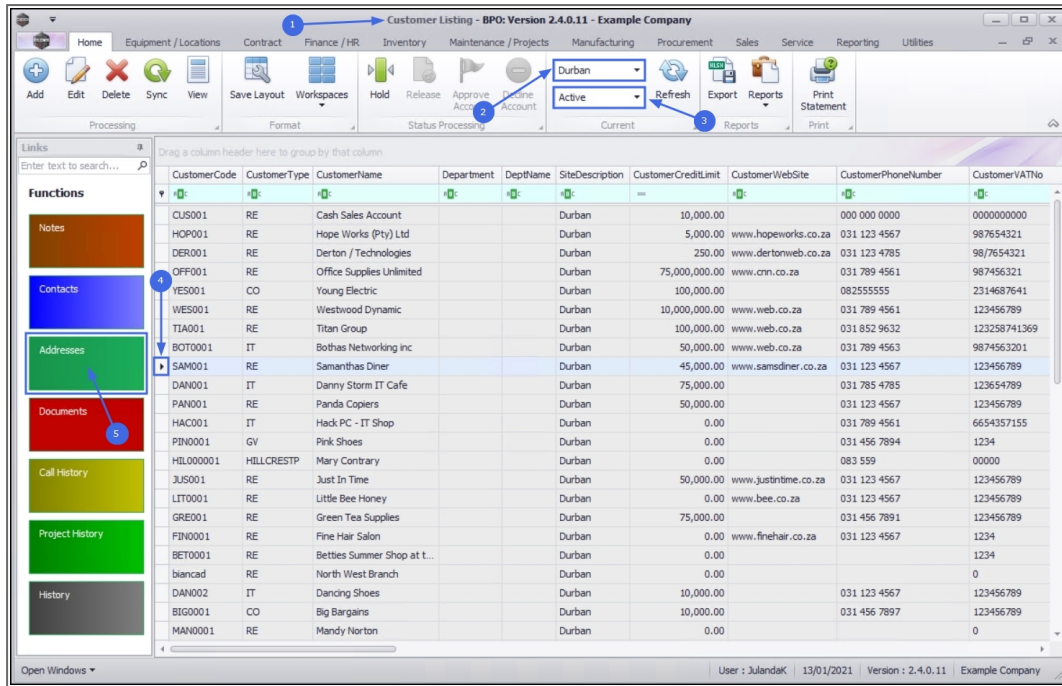
CUSTOMERS – ADDRESSES

- 
 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.



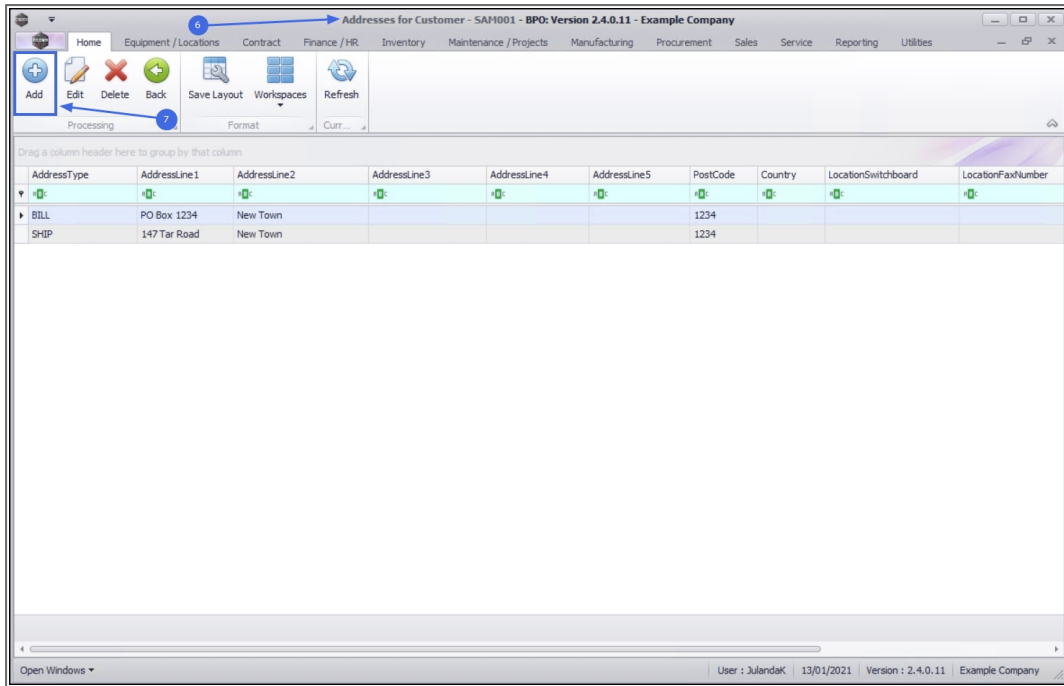
6. The **Addresses for Customer** screen will be displayed.

ADD CUSTOMER ADDRESS

7. Click on **Add**.



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



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

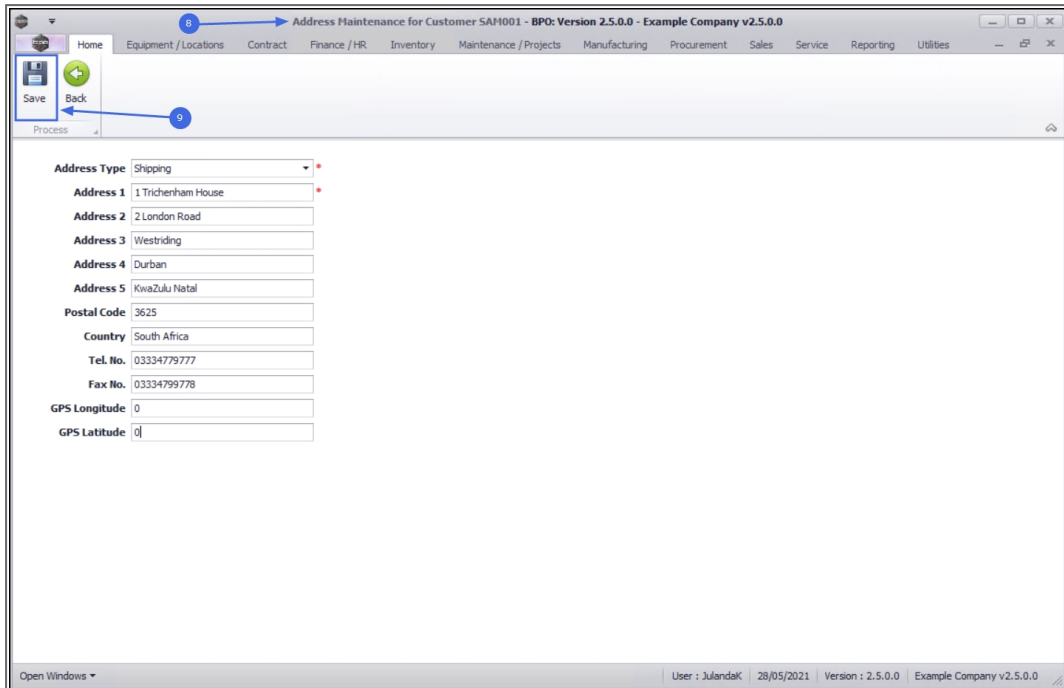
- **Address Type:** Click on the **drop-down arrow** to select the **Address Type**.



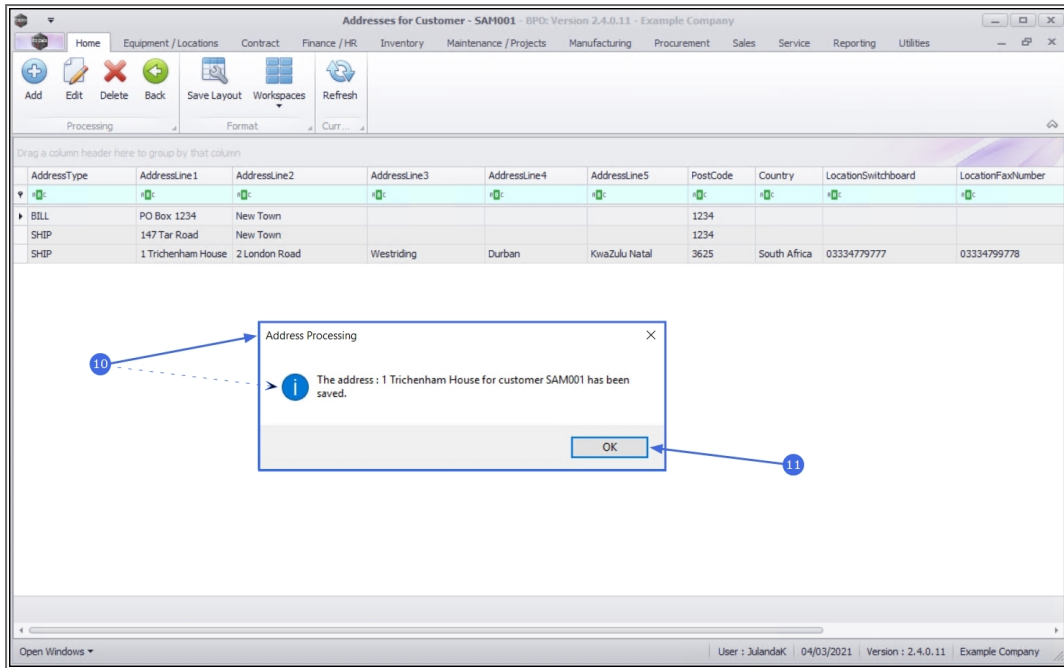
Note that there can only be one Billing address. You can have multiple Shipping addresses.

- **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**.

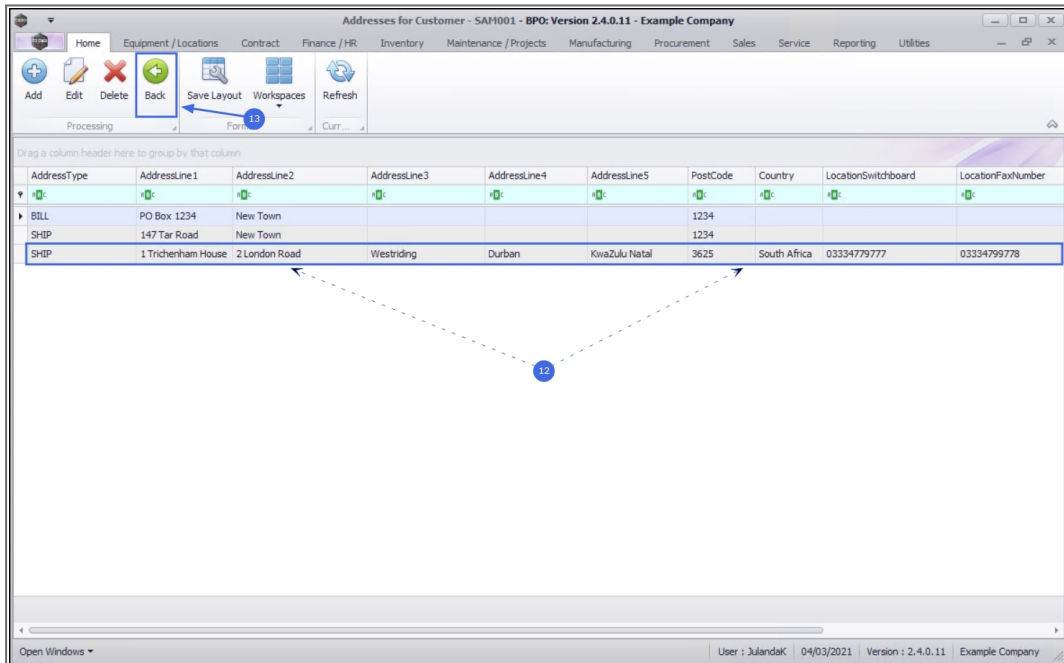


10. An **Address Processing** message box will pop up informing you that;
- **The address : [address] for customer [customer code] has been saved.**
11. Click on **OK** to proceed.



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.

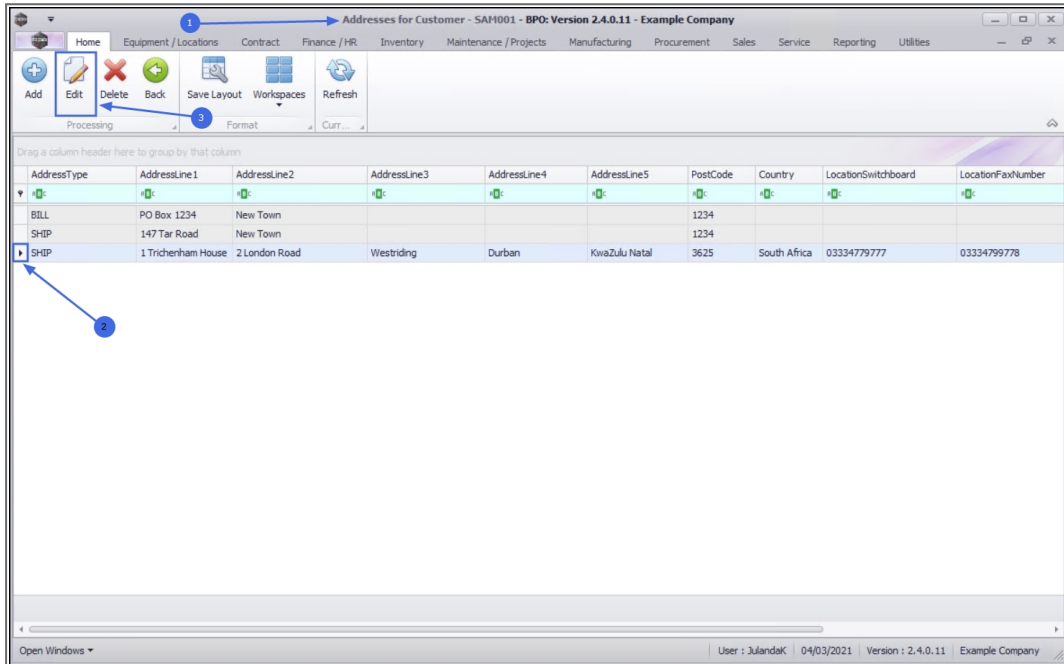


EDIT CUSTOMER ADDRESS

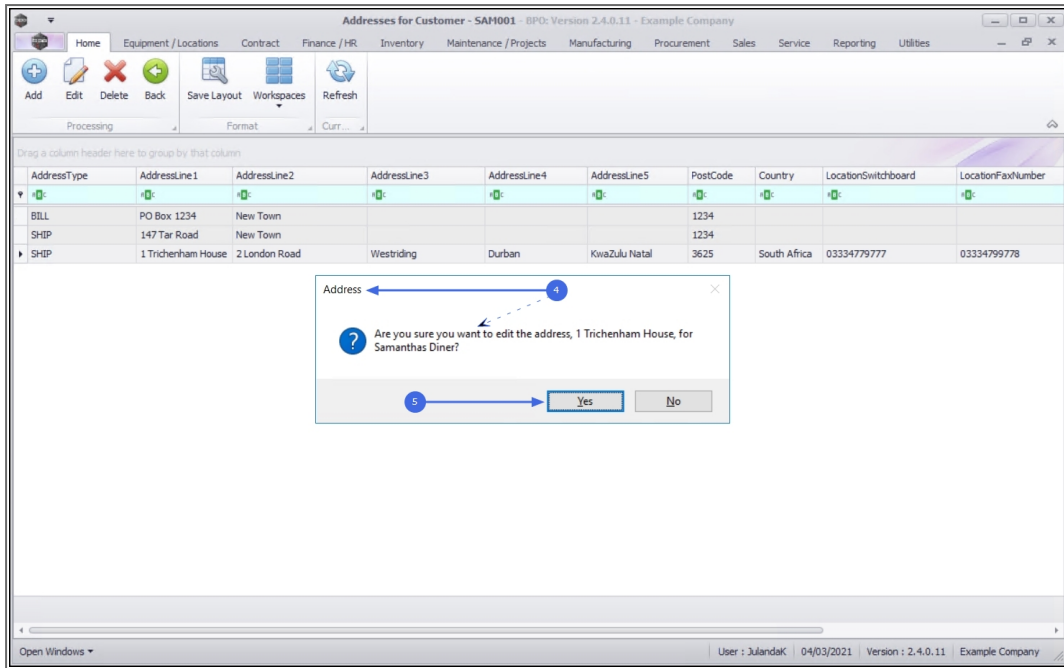
1. From the **Addresses for Customer** screen,
2. Select the **row** of the **address** you wish to **edit**.
3. Click on **Edit**.



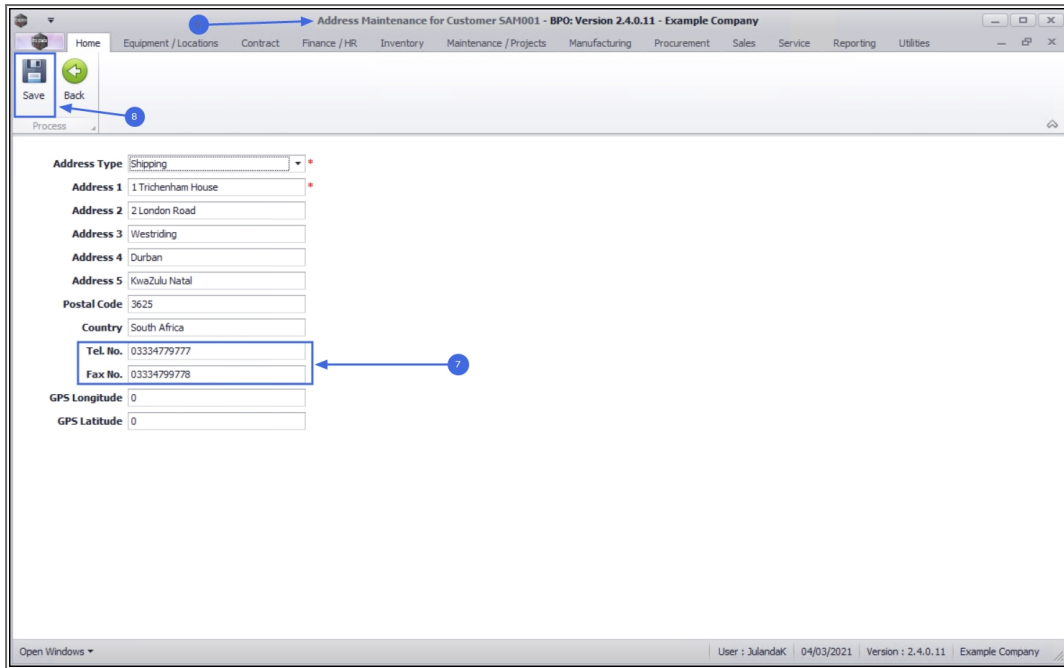
Short cut key: Right click to display the **Process** menu list. Click on **Edit**.



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.

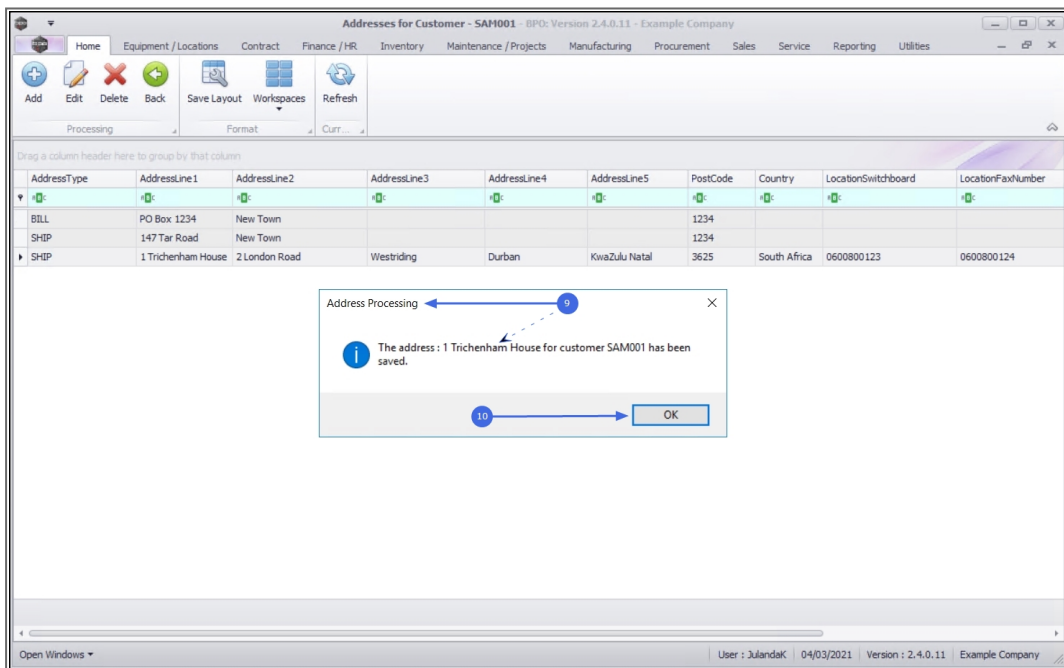


6. The **Address Maintenance for Customer** screen will be displayed.
7. Make the required changes to the Customer Address.
 - The example has the **Tel No.** and **Fax No.** highlighted to be changed.
8. Click on **Save**.

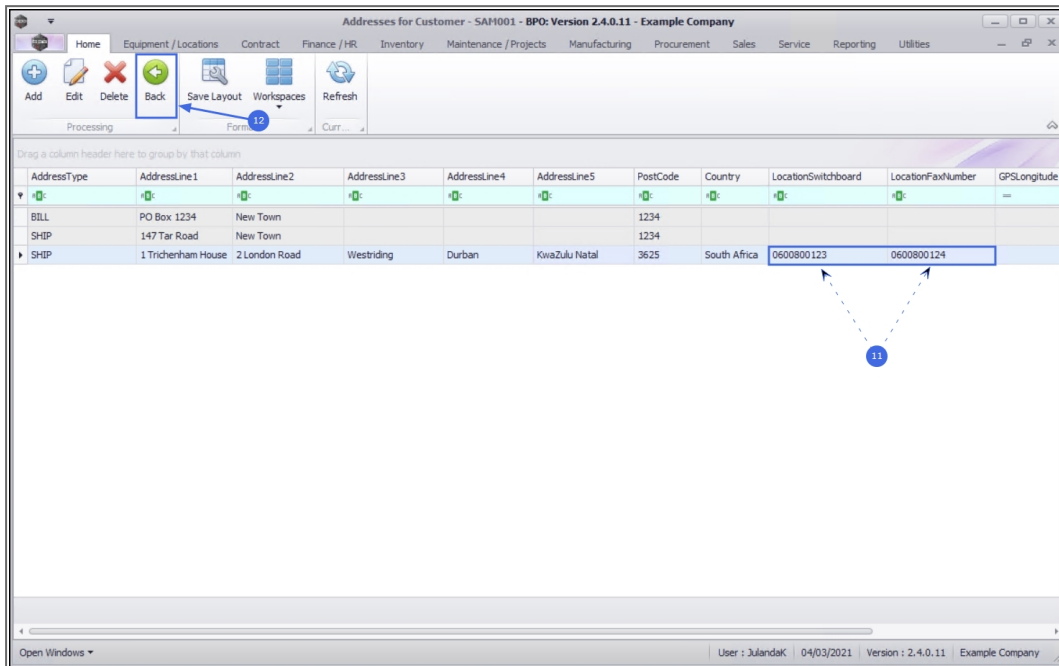


9. When you receive the **Address Processing** message to confirm that;
- **The address: [address] for customer [customer code] has been saved.**

10. Click on **OK**.



- The changes can now be **viewed** in the **Addresses for Customer** screen.
- Click on **Back** to return to the Customer listing screen.

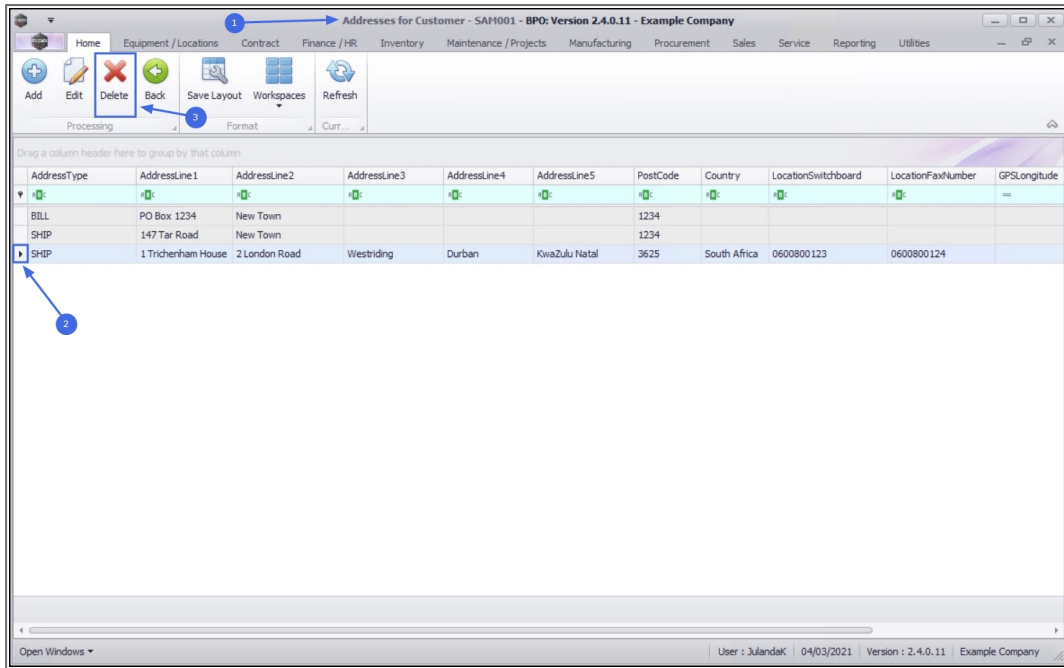


DELETE CUSTOMER ADDRESS

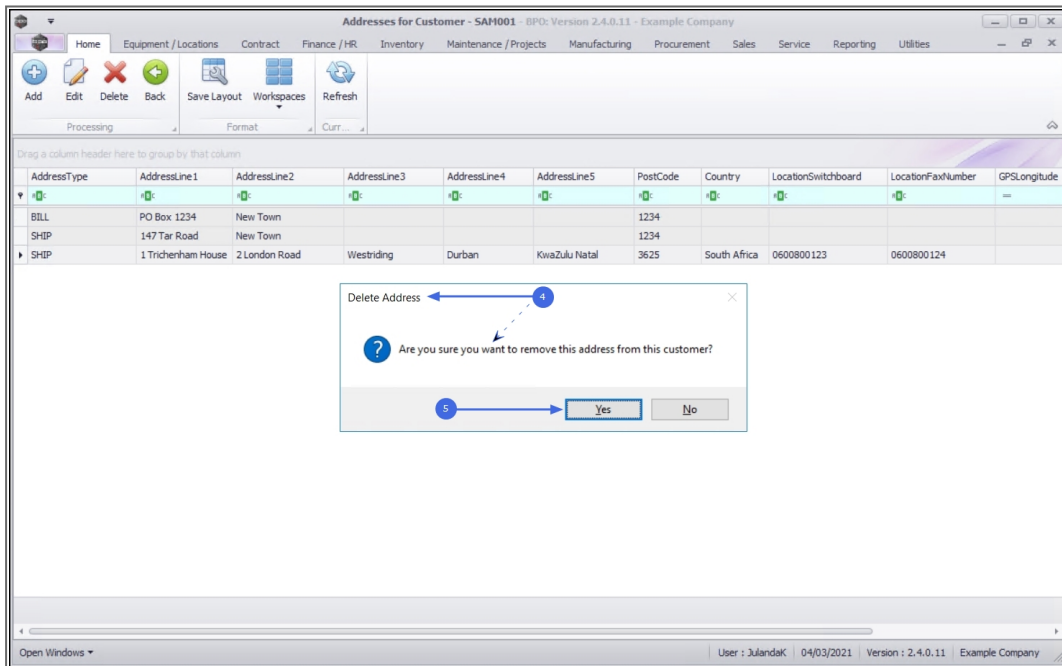
- From the **Addresses for Customer** screen,
- Select the **row** of the customer **address** you wish to **delete**.
- Click on **Delete**.



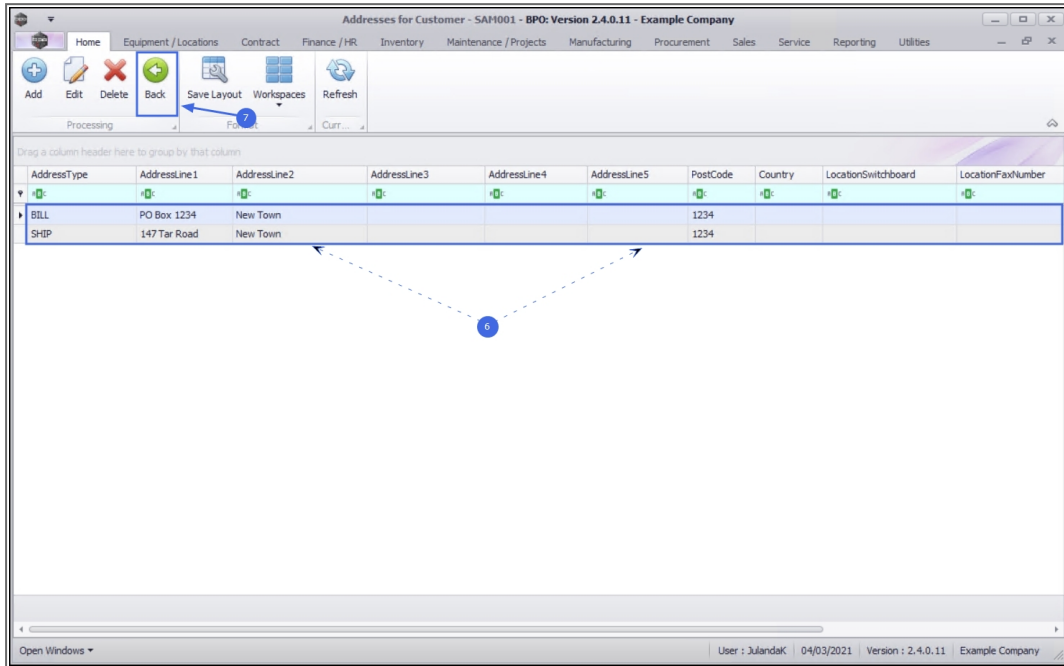
Short cut key: Right click to display the **Process** menu list. Click on **Delete**.



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.



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



MNU.061.003

