

QUICK REFERENCE GUIDE

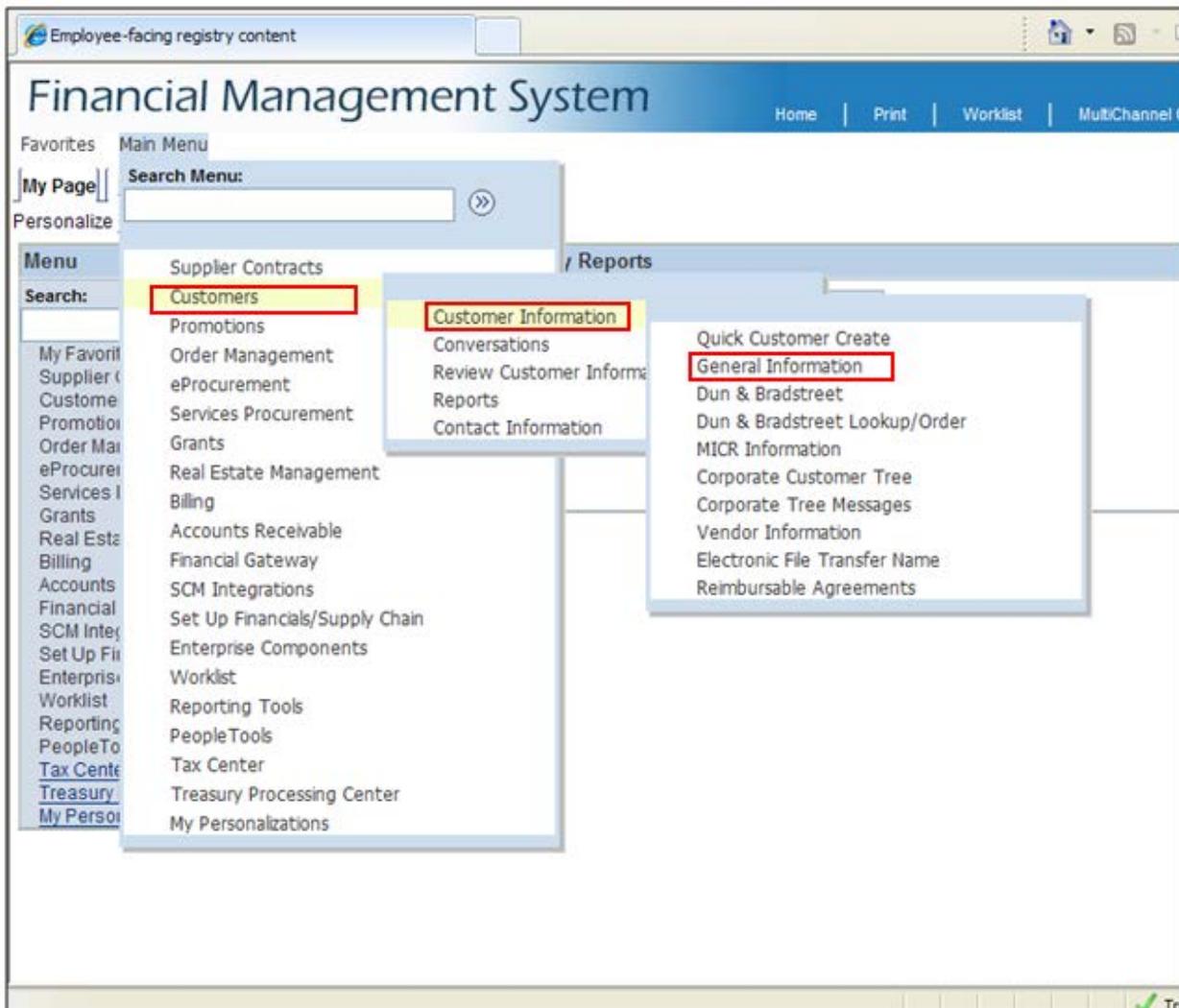
Entering Additional Customer Location Addresses

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Entering Additional Customer Location Addresses

This Quick Reference Guide will help you to enter additional customer location addresses. Begin by navigation to the General Information Search page for Customers.

1. **Navigate Links:** Customers, Customer Information, General Information.



General Information

Financial Management System

Home | Print | Worklist

Favorites Main Menu Customers Customer Information General Information

General Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Maximum number of rows to return (up to 300): 300

SetID: = G0201

Customer ID: begins with 00000008263

Name 1: begins with

Name 2: begins with

Telephone: begins with

City: begins with

State: begins with

Postal Code: begins with

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

2. Accept the default or enter the *SetID* (same as **Business Unit**).
3. Enter the *Customer ID*.
4. Click on the **Search** button. This brings you to the *General Information* page.

5. Scroll down to the **Address Locations** section.
6. Click on the **Add (+)** to move to a new Address Location screen. The **Location** displays **2**.

7. Enter the **Description**.

8. Select the **Roles** (Bill To/Primary etc.).
9. Enter the Address information in the **Address Details** section.
10. Click on the **View Phone Information** link.

The screenshot shows the 'Financial Management System' interface. The 'Address Locations' tab is active, displaying a location with ID '2' and description 'Little Canada'. The 'Roles' section is checked with 'Bill To', 'Worksite', and 'Sold To' all set to 'Primary', and 'Correspondence Address' checked. The 'Address Details' section is expanded, showing fields for Effective Date (09/30/2011), Status (Active), Tax Code, Language Code (English), Physical Nature, Where Performed, Alternate Names, Country (USA), Address 1-3, City (Little Canada), County (Ramsey), and State (MN). A 'View Phone Information' link is highlighted in a red box.

11. Enter **Phone Information**.
12. Click **OK** or **Cancel** to return to the *General Information* page.

The screenshot shows the 'Phone Information' dialog box. The 'General Information' tab is selected. The dialog box contains fields for Prefix (651), Phone (444-4444), Ext, and Fax. The 'OK' button is highlighted in a red box.

13. Click on the **Save** button.