SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Update Customer Address Locations

This guide covers how to change a customer address. Other changes may be made by simply updating the appropriate field in the customer information.

> **Note**: You cannot make changes to the Effective Date fields. If these dates are not correct, contact the SWIFT Help Desk for assistance.

There are two different circumstances in which you might need to make a change to the customer's address:

1. The customer has an alternate location; the new address *supplements* the existing address.
2. The customer is moving to a completely new address; the new address *replaces* the existing address.

It's important to ask the customer questions to determine which type of address change is being requested before you update the record. Both options are covered in this guide.

Steps to complete:

- Step 1: Navigate to the General Information page for the Customer
    - Option 1: Add a Supplemental Address (another location)
    - Option 2: Make a Permanent Address Change

Step 1: Navigate to the General Information page for the Customer

1. Navigate to the *General Information* page for the customer using one of the options below. You are able to access the *General Information* page from the Billing or Accounts Receivable modules.

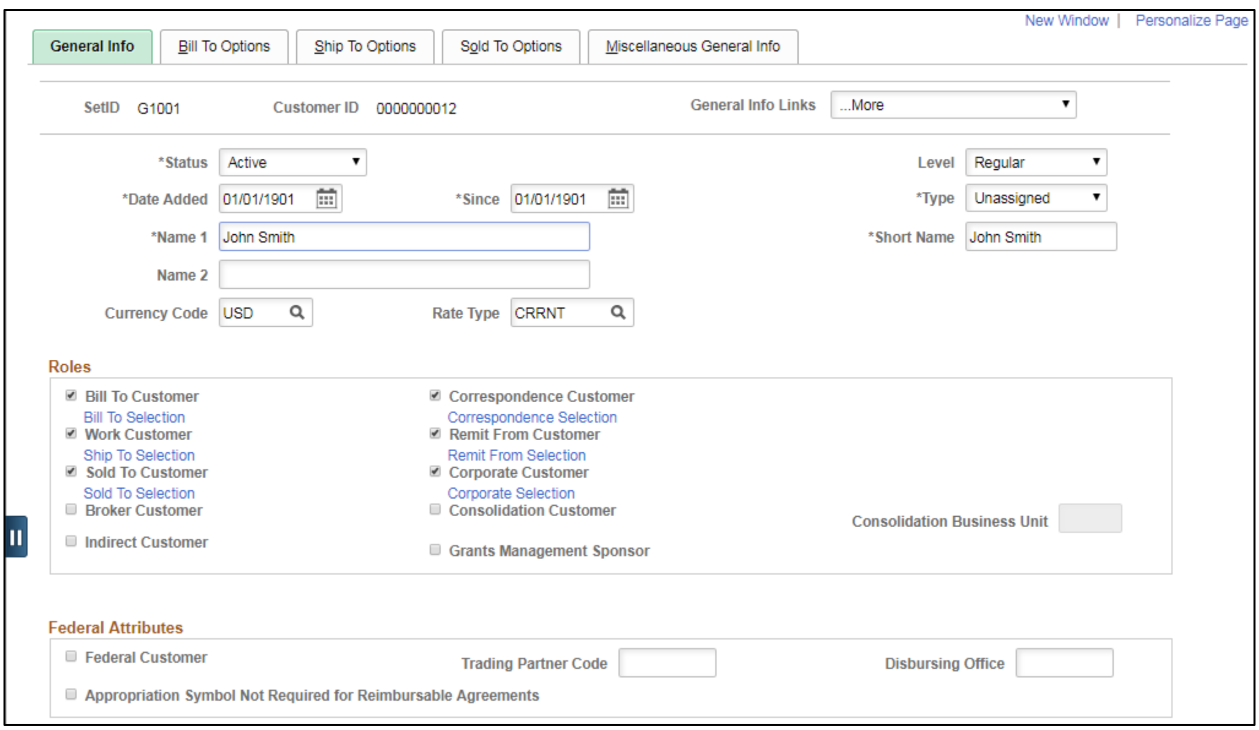
    - From the Billing Module:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Customer Contact. The General Information page will display by default.
WorkCenter	Accounting, Billing, Billing WorkCenter, left-menu, Links section, Customer & Contact Information, Customer General Information.

- From the Accounts Receivable Module:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions. The General Information page will display by default.
WorkCenter	Accounting, Accounts Receivable, Receivables WorkCenter, left-menu, Links section, Customer & Contacts, Customer General Information.

2. Click the **Find an Existing Value** tab.
3. You **must** enter your *SetID* field (usually the same as your *Business Unit*) or click on the **Lookup** icon and select a *SetID*. **Note: Do not use the default ("SHARE").**
4. Enter the *Customer ID*. **Note:** if you do not have the *Customer ID*, you can use any of the other search variables to locate the existing customer information.
5. Click on the **Include History** checkbox to view all of the information for the Customer, including all of the address records.
6. Click on the **Search button**. The *General Information* page displays. This tab contains all of the relevant information about the customer. Almost all changes to customer information will be made on this page.



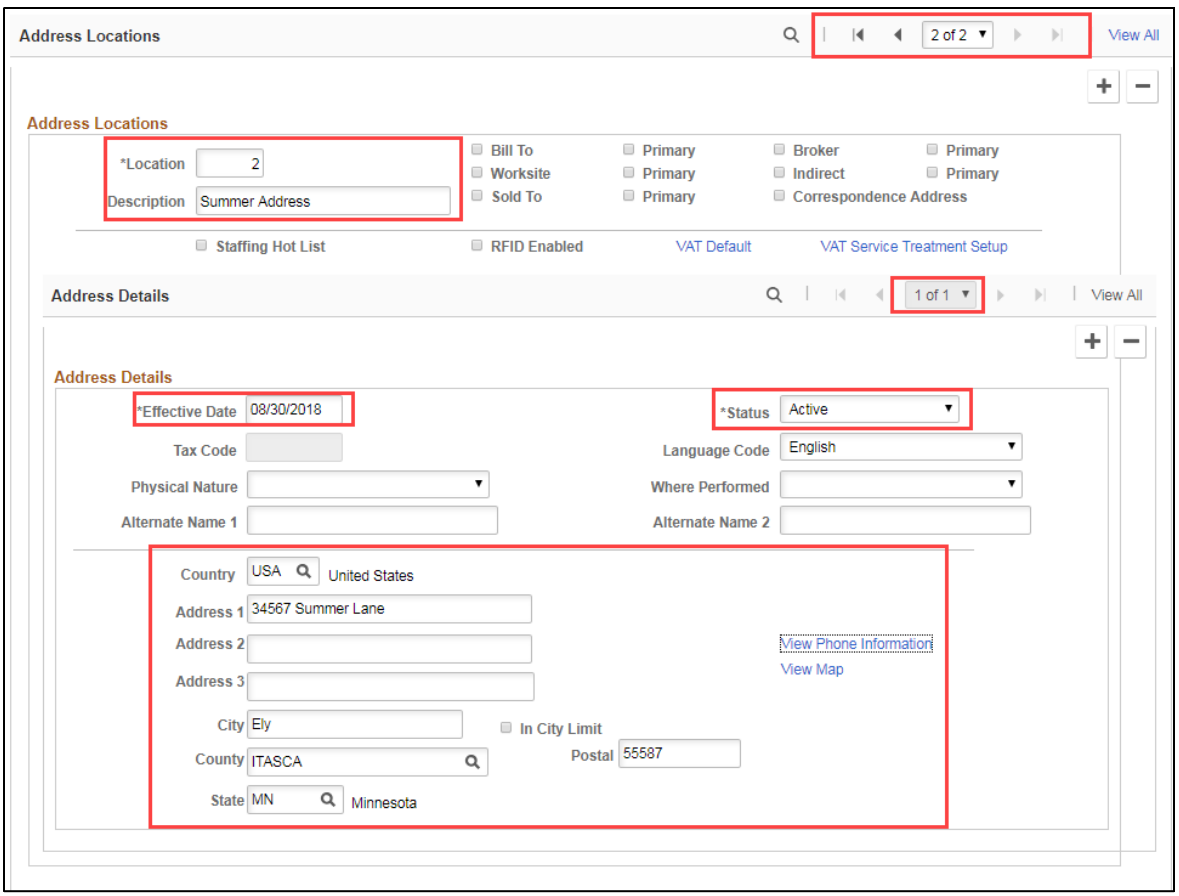
Option 1: Add a Supplemental Address (another location)

A supplemental address change is made by adding a new location to the customer information. This might be needed for a business that has several facilities or buildings and needs certain types of communication to be sent to specific locations. For an individual it might represent a temporary or seasonal address.

WARNING! This option is not used when a customer is moving. If the customer is moving, you should follow the instructions in Option 2 to make a permanent address change.

The existing Location 1 will usually remain the primary location for correspondence, but not necessarily. Also, the customer may already have multiple locations entered, including the new address being requested. It is important to review the existing information to ensure that the change needs to be made.

1. In the **Address Locations** section, click the **Add New Row** icon (plus sign) to create a second location record.



2. Check to be sure you are updating the new location 2. The checkboxes designating this location as *Primary* default to deselected. If you want this new location to be the primary address for any of these address types, you must select them here and they will automatically be deselected for Location 1.

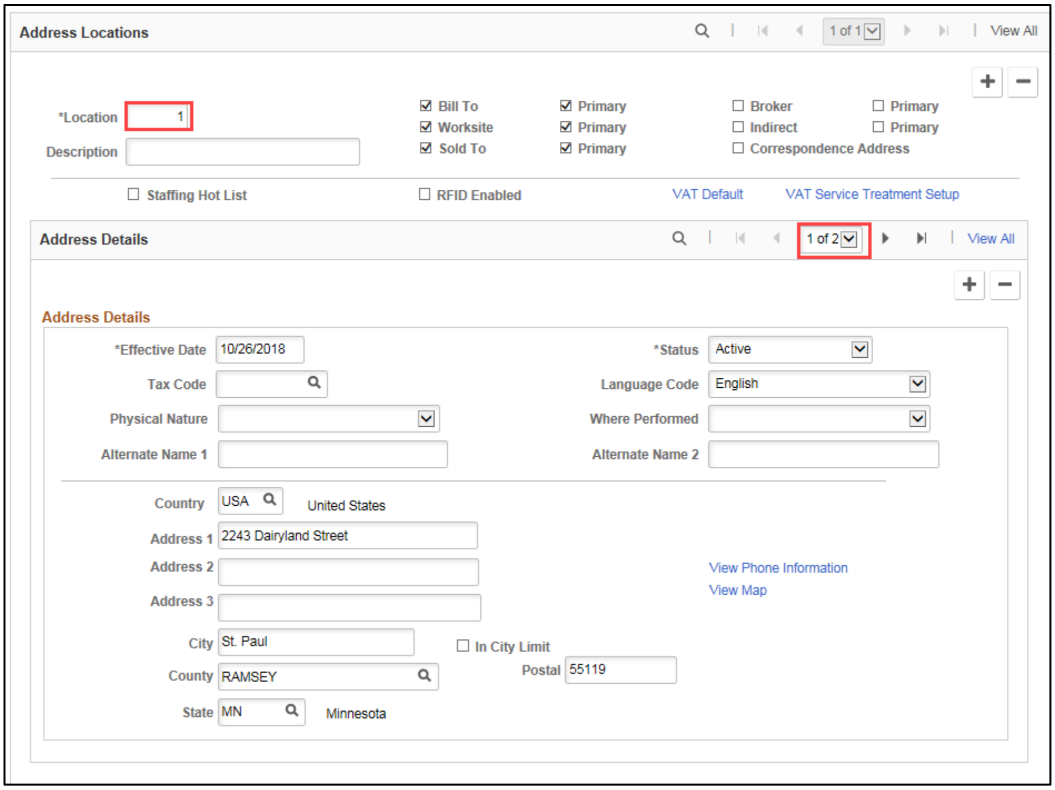
3. Enter the *Country* code. You can't enter any other address information until you have entered a Country code. SWIFT uses the code to format the address fields. Use "USA" for US addresses, or click the **Lookup** icon to select a different country.
4. Accept the default *Effective Date* or change the date.
5. Enter the new address details as you would normally. Refer to the "Enter a New Customer" guide for detailed instructions.
6. Click the **Save** button.

Option 2: Make a Permanent Address Change

A permanent address change means you are entering new address details for Location 1. This is the primary location for correspondence. A permanent address change is done when the customer wants to change their primary address, such as from a street address to a post office box, or is physically moving to a new location.

1. In the **Address Locations** section, make sure you are on the Location 1 (the primary address) record.
2. In the **Address Details** section for Location 1, click on the **Add New Row** icon (plus sign) to create a second address details record for Location 1.

   Note: SWIFT retains the existing address details. This enables you to make a simple, cosmetic change. For example, if the address is "Drive" but should have been "Street," or numbers in the zip code are transposed, you can make the correction without having to retype the entire address. You must make even a cosmetic change by creating a new details row; you cannot just type over the existing address details.
3. Accept the default *Effective Date* or change the date. The new address will be available to send correspondence on the effective date.
4. Enter the new address details as you would normally. Refer to the "Enter a New Customer" guide for detailed instructions.
5. Click the **Save** button. You have successfully completed a permanent address change.



Note: Be sure to check for additional locations that might have been created for this customer. Don't assume that address Location 1 is the only location. If there are other locations, check with the customer to determine if they are still applicable or if they need to be changed or deactivated. When the **Include History** button located at the bottom right of the page has been selected, you are able to view all the address records for the customer (it will appear grayed out if it has been selected).