

Adding/Changing an Address

Auto-generated document.

If you are setting up a new account, please disregard points 14-17.

Regardless of the country, data such as street, postcode and city must be entered in the correct fields.

Fields highlighted in **yellow** are user populated fields.

Recorded by:	Daniel.S
Recorded date:	07/04/2016
Document created:	10/01/2017
Document Modified:	10/05/2017

1. Go to Sales ledger -> Common -> Customers -> All customers.

All customers

Customer account

Name

Full Order

Terms of payment

Mode of delivery

Credit limit

Line discount

Telephone

Postcode

Extension

TEN501

1066 Pools Ltd

☒

EOM1

06

10,000.00

100

01424870505

TN33 0RJ

THRE02

3 Seas Deliveries Ltd

☒

PROF

01

0.00

130

08450304321

CM2 8LS

THRE01

365 Technical Plant Services

☒

PROF

01

0.00

080

01617975290

BL8 1EN

ADPO01

A & D Pools Ltd

☒

EOM1

01

2,000.00

100

01428724345

GU30 7DA

ARPR01

A & R Products (South East) Ltd

☒

EOM1

41

7,000.00

100

01233841855

TN27 0PG

ABIG01

A Bigger Splash

☒

PROF

01

0.00

100

01748812039

DL10 7SN

AFPO01

A F Pool Services Ltd

☒

EOM1

01

3,000.00

120

1639883976

SA13 2UL

AGBU01

A G Budget Swimming Pools & Spas

☒

EOM1

01

5,000.00

120

02089416618

DY13 9JY

KOUN01

A Kantidakis & Coi

☒

PROF

22

0.00

250

0302310328840

OSKA01

A Oskarsson & Co EHF

☒

PROF

24

0.00

250

03545666600

APSM01

A P S Meats Ltd

☒

EOM1

01

3,000.00

100

02088077315

N9 9BU

ATVI01

A T Vincent & Sons (C)

☒

EOM1

01

5,000.01

110

01395577840

EX10 0NF

VAND01

A Vandecastelle Nv

☒

PROF

01

0.00

250

03293865620

AMGA01

A.M Garden Machinery Ltd

☒

EOM1

01

2,000.00

080

02085003578

IG7 6ET

AAP001

AA Pools

☒

EOM1

01

2,000.00

100

01983864248

PO37 6AB

ABAC01

Abac Elec & Building Scves (C)

☒

PROF

01

0.00

060

020476440524

CV12 0NL

ABAC02

Abacus Pools & Spas Ltd

☒

EOM1

01

3,000.00

101

07932 948769

LUS 6BB

ABBE06

Abbey World Of Leisure (C)

☒

EOM1

01

4,000.00

100

01525875599

LUS 6HE

ABER02

Aberaron Secondary School

☒

EOM1

01

1,000.00

500

01545570217

SA46 0DT

ABPS01

Abp Sasu (C)

☒

PROF

01

0.00

250

0330553566887

ABRA01

Abracross Ltd T/A Pipescenes

☒

EOM1

01

5,000.00

100

02380557555

SO17 3SP

ABSP01

Abis Pools Ltd

☒

EOM1

01

15,000.00

140

01743468969

SV1 3TG

ABSP02

Abis Pools Ltd #2

☒

EB

01

5,000.00

140

01743468969

SV1 3TG

ACFC01

ACF Chemical & Leisure Supplies

☒

PROF

01

0.00

100

02897 560778

BT24 8PU

SAFE01

Ackow Ltd T/A Safe & Secure

☒

PROF

01

0.00

01335347058

DE6 1AS

ADBB01

Adb Bvba

☒

EOM1

22

15,000.00

265

03284845336

ADML01

Adm Leisure Swimming Pools

☒

EOM1

01

10,000.00

060

01403784714

GU28 0SG

ADRI05

Adria Bazen d.o.o.

☒

EOM2

24

3,000.00

265

0038552576229

MAN001

Adrian Hills

☒

PROF

22

0.00

250

0302721077968

Customer group:

Credit limit:

Delivery terms:

VAT group:

Settlement discount:

Terms of payment:

Method of payment:

Payment schedule:

Modified date and time:

Modified by:

Primary address

Recent activity

Statistics

Classification balances

Roles

Relationships

Contacts

Recurring invoice templ...

Related information

Tax registration info

2. Make sure Your table displays the below information:

Customer account	Name	Full Order	Terms of payment	Mode of delivery	Credit limit	Line discount	Telephone	Postcode	Extension
LUXE01	UAB Luxe Pools	Yes	PROF	22	0.00	250	37065566556		

3. Double-click or press Enter on the desired Customer.

4. Switch to the General tab.

The screenshot shows the 'General' tab of the 'Customer account: LUXE01, UAB Luxe Pools' window. The window has a menu bar (File, Customer, Sell, Invoice, Collect, Projects, Service, Market, Retail, General) and a toolbar with icons for various functions. The main area is divided into sections: 'Customer' (Account: LUXE01, Record type: Organisation, Name: UAB Luxe Pools, Search name: UAB Luxe Pools, Customer group: D, Classification group: D), 'Organisation details' (Number of employees: 0, Organisation number: ABC code: None, DUNS number:), and 'Other information' (Address books, Language: en-gb, Full Order: ☐). There is a 'Show more fields' button. On the right, there is a 'Primary address' section with a list of recent activity, relationships, statistics, tax registration info, contacts, recurring invoice templates, and related information.

5. Click the Add Button Under Addresses.

The screenshot shows the 'New address (1) - Customer account: LUXE01, UAB Luxe Pools' window. It has a title bar with standard window controls. The main area contains fields for 'Location ID:' (ADR000149599), 'Name or description:' (UAB Luxe Pools), and 'Purpose:' (Business;Delivery;Invoice). Below these is the 'Address' section with a dropdown for 'Country/region:' (GBR) and a 'Postcode:' field. A 'Street:' field is also present. A list of countries/regions is displayed, including GBR (United Kingdom), GEO (Georgia), GGY (Guernsey), GHA (Ghana), GIB (Gibraltar), GIN (Guinea), GLP (Guadeloupe), GMB (Gambia), and GNB (Guinea-Bissau). Below the list are fields for 'City:', 'State:', 'County:', 'Primary:', 'Primary for country:', and 'Private:'. The 'Contact information' section is expanded, showing 'Tax registration' and 'General' tabs. The 'Delivery' section is also visible. At the bottom, there are 'OK' and 'Cancel' buttons.

6. Change/Add Name or Description

7. Change **Purpose** from 'Business' to **'Business;Delivery;Invoice'** or as required. Each Account requires at least one Business, Delivery and Invoice Address.

8. Change/Add **Country/region**

9. Change/Add **Postcode**

10. Change/Add **Street**

11. Change/Add **City**

12. **(Skip this step if you are adding additional Addresses)**

Change **Primary** from 'false' to 'true' and Click **Yes** on the form:

“This will unmark the current primary address. Do you want to continue?”

13. Click the **OK** button.

14. Switch to the **General** tab on the Customers form.

The screenshot shows the 'Customers' form in Microsoft Dynamics CRM. The 'General' tab is selected, displaying customer information for 'LUXE01: UAB Luxe Pools'. The 'Addresses' section contains a table with two entries:

Name or description	Address	Purpose	Primary
UAB Luxe Pools	Vokieciu str. 24 Vilnius LT-01130 Lithuania	Business/Delivery/Invoice	Yes
UAB Luxe Pools	Zirmunu 68 Vilnius LT-01134 Lithuania	Business/Delivery/Invoice	No

The 'Contact information' section shows a table with contact details:

Description	Type	Contact number/address	Extension	Primary
Phone		37065566556		☒
E-mail a...		info@lux-pools.com		☒

15. Make sure the Addresses table appears as below:

Name or description	Address	Purpose	Primary

16. Select the old Address and Click **More options** -> **Remove**.

17. Click **Yes** in the **Microsoft Dynamics** form:

“This address is used as a default, do you want to continue?”

18. Switch to the **General** tab on the Customers form.

The screenshot shows the SAP Customer account form for LUXE01: UAB Luxe Pools. The General tab is active, displaying the following information:

- Customer:** Account: LUXE01, Record type: Organisation, Name: UAB Luxe Pools, Search name: UAB Luxe Pools, Customer group: D, Classification group: D.
- Organisation details:** Number of employees: 0, Organisation number: ABC code: None, DUNS number: None.
- Other information:** Address books: en-gb, Language: en-gb, Full Order: ☐.
- Addresses:** A table with columns: Name or description, Address, Purpose, Primary. The table contains one row for 'UAB Luxe Pools' with address 'Vokietu str. 24, Vilnius, LT01130, Lithuania' and Purpose 'Business/Delivery/Invoice'.
- Contact information:** A table with columns: Description, Type, Contact number/address, Extension, Primary. It contains two rows: 'Phone' with number '37065566356' and 'E-mail a...' with address 'info@luxe-pools.com'.

19. Under the Addresses Tab, Select the new Address and Click **More options** -> **Set defaults**.

20. Change the **Default address** for each of the rows in the table to the newly created address.

Purpose	Default address
Delivery	

Purpose	Default address
Business	

21. Click the **OK** button.