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
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Document Modified:	10/05/2017

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

Il customers •									Name	▼ →	🚿 🚺 🖉 🕅	Trinary address	
Customer account	Name	Full Order	Terms of payment	Mode of delivery	Credit limit	Line discount	Telephone	Postcode	Extension		^		
•	· · · · · · · · · · · · · · · · · · ·	*	-	-	*	*		· ·	*				
TENS01	1066 Pools Ltd		EOM1	06	10,000.00	100	01424870505	TN33 0RJ					
THRE02	3 Seas Deliveries Ltd	\checkmark	PROF	01	0.00	130	08450304321	CM2 8LS				Descent and day	
THRE01	365 Technical Plant Services		PROF	01	0.00	080	01617975290	BL8 1EN				Recent activity	12
ADPO01	A & D Pools Ltd	\checkmark	EOM1	01	2,000.00	100	01428724345	GU30 7DA				Statistics	
ARPR01	A & R Products (South East) Ltd		EOM1	41	7,000.00	100	01233841855	TN27 0PG				Classification balances	
ABIG01	A Bigger Splash	\checkmark	PROF	01	0.00	100	01748812039	DL10 7SN				Roles	
AFPO01	A F Pool Services Ltd		EOM1	01	3,000.00	120	1639883976	SA13 2UL				D. L. C	
AGBU01	A G Budget Swimming Pools & Spas	\checkmark	EOM1	01	5,000.00	120	02089416618	DY13 9JY				Relationships	
KOUN01	A Kantidakis & Coi		PROF	22	0.00	250	0302310328840					Contacts	2
OSKA01	A Oskarsson & Co EHF	\checkmark	PROF	24	0.00	250	03545666600					Recurring invoice templ	. 🕞
APSM01	A P S Meats Ltd		EOM1	01	3,000.00	100	02088077315	N9 9BU				Related information	
ATVI01	A T Vincent & Sons (C)	\checkmark	EOM1	01	5,000.01	110	01395577840	EX10 ONF				T 1.1 11 1.7	
VAND01	A Vandecasteele Nv		PROF	01	0.00	250	03293865620					Tax registration into	Ð
AMGA01	A.M Garden Machinery Ltd		EOM1	01	2,000.00	080	02085003578	IG7 6ET					
AAPO01	AA Pools		EOM1	01	2,000.00	100	01983864248	PO37 6AB					
ABAC01	Abac Elec & Building Scves (C)		PROF	01	0.00	O60	020476440524	CV12 ONL					
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	LU5 6HE					
ABER02	Aberaeron 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	Abs Pools Ltd		EOM1	01	15,000.00	140	01743468968	SY1 3TG					
ABSP02	Abs Pools Ltd #2		EB	01	5,000.00	140	01743468968	SY1 3TG					
ACFC01	ACF Chemical & Leisure Supplies		PROF	01	0.00	100	02897 560778	BT24 8PU					
SAFE01	Ackw 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	O60	01403784714	GU28 0SG					
ADRI05	Adria Bazeni d.o.o.		EOM2	24	3,000.00	265	0038552576229						
			0005	22	0.00	250	0202721077069						

2. Make sure Your table displays the below information:

Custome	Nam	Full	Terms	Mode	Credi	Line	Telephone	Postcod	Extensio
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		r	paymen	deliver		t			
			t	у					
LUXE01	UAB	<mark>Yes</mark>	<mark>PROF</mark>	<mark>22</mark>	<mark>0.00</mark>	<mark>250</mark>	<mark>3706556655</mark>		
	<mark>Luxe</mark>						<mark>6</mark>		
	<mark>Pools</mark>								

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

4. Switch to the General tab.

🙀 Customers (1 - pla) - Customer account: LUXE01, UAB Luxe Pools			-
File Customer Sell Invoice Collect Projects Service Market Retail General			
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LUXE01: UAB Luxe Pools		Primary address	D ^
/ General	D I A		
Choose note association			
Customer Organisation details	_		
Account: LUXE01 Number of employees: 0	_		-
Record type: Organisation Organisation number:		Recent activity	• •
Name UAB Luce Pools ABC code None		Relationships	• •
version mini- Custome group: D	_	Statistics	•
Classification group: Other information	_	Tax registration info	• •
Address books:		Contacts	V
		Recurring invoice temp	v 🔄k
Full Orden	_	Related information	
Add Main Mare cytoins* Name of description Address Purpose UAB Line Pools Zimmus 6 Visions Lithuania Buriness,Deliverytimotice Yes UBB Line Pools Zimmus 6 Visions Buriness,Deliverytimotice Yes	•		
Contact information			
Image: Add in the options *			
Description Type Contact number/addense Extension Primary Phone 2706556555 Contact number/addense Extension Primary E-mail a Moletitude pool.com State			
Misellaneous details	Aluma		
K < III > H / / III - 1 (2) The customer account number 🔔	504543) GBP USR M	odel pla initial	Close

5. Click the Add Button Under Addresses.

🧾 New address (1) - (Customer account: LUXE	01, UAB Luxe Pools			
Location ID:	ADR000149599				
Name or description:	UAB Luxe Pools				
ourpose:	Business;Delivery;Invoid	e v			
Address	655				
Country/region:	GBR			 	
Postcode:	Country/region	Description	Address ^	 	
Street:	-		▼		
	GBR	United Kingdom	0005		
	GEO	Georgia	0003		
	GGY	Guernsey	0005		
City:	GHA	Ghana	0003		
State:	GIB	Gibraltar	0006		
County:	GIN	Guinea	0006		
Primary:	GLP	Guadeloupe	0003		
Deinenen fen en unter	GMB	Gambia	0003		
Primary for country	<	Guinea Pissau	0002 *		
Private:					
Contact informat	tion				
Tax registration					
General					
Delivery					
				OK	Cancel
				UK	Cancel

6. Change/Add Name or Description

7. Change **Purpose from '**Business' to <mark>'Business;Delivery;Invoice'</mark> 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.

Image: Definition of the local field in	Customers (1 - pia) - Customer account: LUX	UT, UAB LUXE POOIS		
Image: Series of the series of th	File - Customer Sell Invoice	Collect Projects Service Market Retail G	neal	L 0
	X Delete Second Se	iansactions Balance Forecast Set up	at from Attachments Taxes Registration number starch Registration	
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Image: State of the second	Change party association			Vilnius LT-01924
Accord User Bechel yee Orgenities Bechel yee Accord Bechel yee Bechel yee Bechel ye	Customer	Organisation details		Lithuania
Recent type: Organization number Hame: UBB Lue Pool: Careficition room: DOS number Band norm: DOS number Careficition room: DOS number Careficition room: DOS number Address books: Lue Pool: Address books: Lue Pool: Fall of the standard Address books: Address books: Lue Pool: Fall of the standard Address books: Address books: Lue Pool: Fall of the standard Peore of the standard	Account: LUXE01	Number of employees: 0		
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	K ◀ Ⅲ ► ₩ ∕ 🛄 🖃 8	View or enter a description of the selected address record.		(1504543) GBP USR Model pla initial Close

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.

🙀 Curtomers (1 - pla) - Curtomer account: LUXE01, UAB Luxe Pools	- • •
File - Customer Sell Invoice Collect Projects Service Market Retail General	🗆 😟
K Dudere Image: Contraction	
Maintain New Accounts Iransactions Balance Forecast Set up Attachments Registration	
LUXE01 : UAB Luxe Pools	Primary address Primary 60
∠ General ⊘ Charge party association	D I Vilnius LT-01924
Customer Organisation details	Lithuania
Account: UNEOI Number of employees 0 Paradition Organization contained on the surface of the sur	Recent activity 🕞 🗸
Name UAS Luce Pools ASC code None	Relationships 🕞 🗸
Search name: UAB Luxe Pools DUNS number:	Statistics 🕞 🗸
Cutomer group: D Other information Other information	Tax registration info
Cassimilation group. Address books:	Contacts 🖂 🗸
Language: en-gb	Recurring invoice templ.
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Name or description Address Purpose Primary	^
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s Contact information	
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Description Type Contact number/address Extension Primary	
Phone 37065566556	
E-mail a_ info@luxe-pools.com 🕑 🚮	
Miscellaneous details	Always 🗸
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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.**