

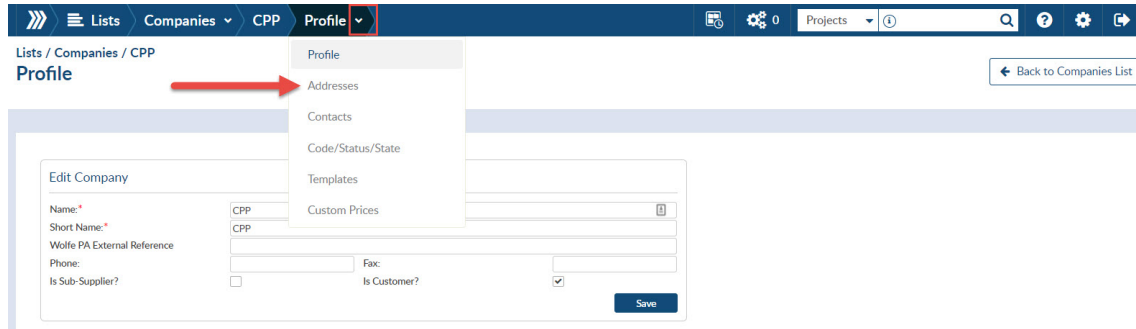
Adding an Address

09/16/2024 1:21 pm MDT

Once the new company Profile is set up, you will want to add an address. When you add a new project it is mandatory to select an address.

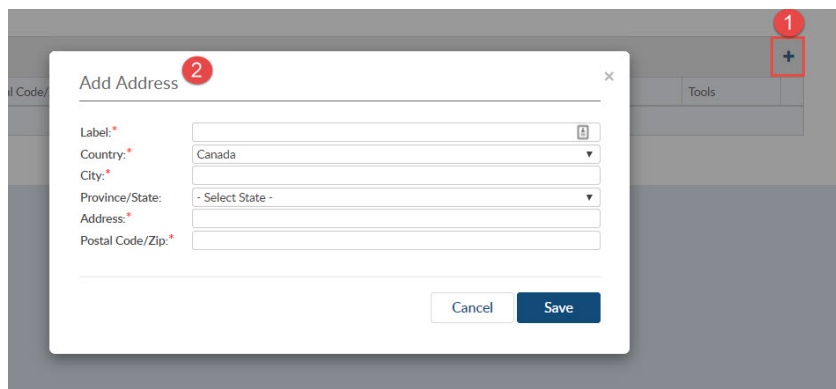
From Companies List, click the specific Company Name (you are adding the address to)

Use Drop down to select Addresses



Step 1. Click the add symbol in the top right of the grid

Step 2. Complete applicable information



Note all data fields with an asterisk symbol ("*") are mandatory.

Label: The label is what is going to appear in the drop down when we are selecting the address for your project setup. See below for example. You want the label to be something that will make for easy selection.



Set Up
Main

Profile

Project Type	<input checked="" type="radio"/> Order <input type="radio"/> Quote
Customer	CPP
Customer Address	Calgary
Project Name	- Select Address -
Project Description	Calgary
Job	West Office
Wolfe PA Sales Order	Address not available
Package Number	
PO Number	
PO Rev Number	
End User	- Select End User -
End User Address	- Select Address -
End User Reference	
Order Date	
Initial Guess for Drawing Approvals	

Although this will not appear anywhere else you will want to ensure it is something that will distinguish the location. Customers can have multiple addresses linked their account depending on where they would like documentation submitted.

Once the address has been saved you will have the ability to select it for all future projects applicable to this company.