Edit Customer Address

Complete the following steps to enter the customer information:

Address

Under the Address tab, enter the Primary Billing Address and Primary Shipping address. (Remember this information will be used to create your customer database, it is essential the information is as accurate as possible. The system also allows you to edit the information at any time during the sales process.)

If the Billing Address will be used for shipping, copy the Billing Address by clicking on the "copy billing address" next to the Shipping Address header. If you desired to copy these changes to the customer's database, select on the "Copy changes to customer" at the bottom of the shipping address section.

Defaults tab

Under the **Defaults** tab, specify the customer shipping preferences, payment terms, select the sales rep working on the lead, **FOB** shipping point, Discounts associated with the customer, Customer's tax code and Tax item to identify tax location.
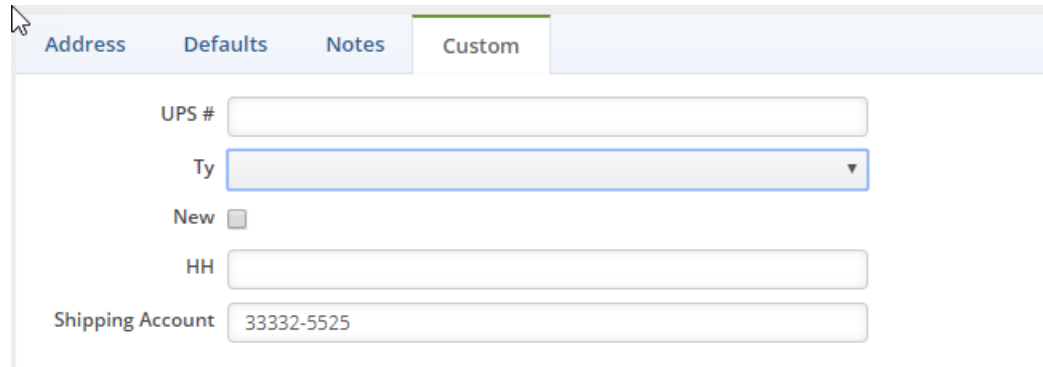

Notes

Under the Notes tab, type relevant information to your customer's account.

Customs

Under the Custom* tab, you can build/customize customer information. (These fields can be activated to ensure they are required)

The screen below does not reflect how your company customization will appear on the screen. The Custom field will depend on how you set up your customization.

Address	Defaults	Notes	Custom

UPS #

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New ☐

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Shipping Account   33332-5525