

# Edit Customer Address

Last Modified on 04/16/2024 10:39 am EDT

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.

Primary Billing Address	Primary Shipping Address <small>copy billing address</small>
Name/Company	Name/Company
Street	Street
Floor/Suite	Floor/Suite
Care of	Care of
City	City
State/Prov./Reg.	State/Prov./Reg.
Zip/Postal code	Zip/Postal code
Country	Country
Contact	Contact
Alt. Contact	Alt. Contact
Phone	Phone
Alt. Phone	Alt. Phone
Fax	Fax
Email	Email

## 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.

Type	Tax Code
Ship Method	Tax Item
Terms	
Sales Rep	
Class	
FOB	
Discount	
Currency	

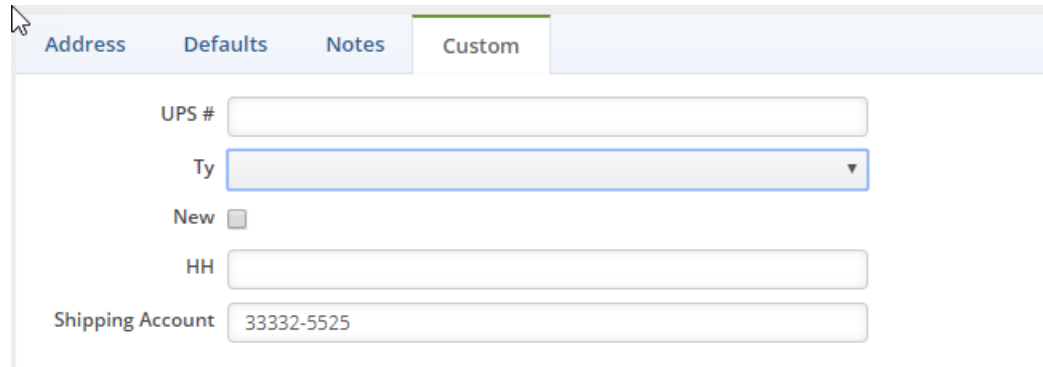
## Notes

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.*



The screenshot shows a software interface with a tabbed menu at the top. The tabs are 'Address', 'Defaults', 'Notes', and 'Custom'. The 'Custom' tab is selected and highlighted with a green underline. Below the tabs, there are several input fields:

- 'UPS #' followed by a text input field.
- 'Ty' followed by a dropdown menu.
- 'New' followed by a checkbox.
- 'HH' followed by a text input field.
- 'Shipping Account' followed by a text input field containing the value '33332-5525'.