Enterprise - Address Standardization

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What is Address Standardization?

Address standardization compares an address entered or changed on a record by your staff with the U.S. Postal Service standard addresses. This can be helpful to ensure the addresses in your system are accurate for tax and reporting purposes.

Address Standardization can be set up for:

- 1. Employee Permanent Address
- 2. Employee Temporary Address
- 3. Customer Address
- 4. Customer Billing Address
- 5. Worksite Address

By default, address standardization is turned off in Enterprise. For each address listed above, you can choose to enable address standardization as an option or make it a requirement to use the U.S. Postal Service standardized address when adding or updating addresses.

Ready to turn these configurations on? Talk to our support team today.

Address Standardization Basics

If the configuration is set to *optional*, the staff member will be able to choose which address they want to use. If they choose the standardized address, it will update the address when they close the window.

If the configuration is set to *required*, the staff member will need to choose the standardized address in order to save.

If the address can not be found in the U.S. Postal Service database, a message will appear letting you know the address has not been found:

| | | | | | @ × |
|--------|-------|---|---------------------|------------------------------------|-----|
| 4 | ado | l new employee | | | |
| pers | sonal | information | address i | nformation | ~ |
| SSN | | | Street | 31400 NEIL ARMSTRONG BLVD | |
| First | Name | Jeremy | Street 2 | | |
| Last | Name | Johnson | City | EAGAN | |
| Initia | 1 | | State | MN | |
| Pho | addr | ress standardization | Zip Code | 55121-1222 | - |
| Ema | Subm | itted Address | Address stand | lardization failed | _ |
| Citra | - | 400 NEIL ARMSTRONG BLVD GAN, MN 55121-2272 | Address Not F | ound. | 0 |
| tax | The a | ddress failed to standardize. You can us | e the address as is | or change it and try standardizing | |
| Bran | again | High Tech SW | | | |
| Fed | | | | | Ĩ. |
| Stat | | | Close | | |
| Mar | | un begin | | | |

When the standardized address is chosen, the check mark will be lit up in green. Hover over the check mark for more information including the date last standardized:

| 上 add | Standardize Address Date Last Standardized 4/18/2019 1:39 PM | | | |
|------------|--|-----------------|---------------------|---------------------------------------|
| personal | information | address in | formation | · · · · · · · · · · · · · · · · · · · |
| SSN | | Street | 3140 NEIL ARMSTR | ONG BLVD |
| First Name | Jeremy | Street 2 | | |
| Last Name | Johnson | City | EAGAN | |
| Initial | | State | MN | · |
| Phone | | Zip Code | 55121-2272 | * |
| Cell | | School District | | |
| Email | | Country | United States of An | nerica 🔻 |

Employee Address Standardization

Address standardization can be turned on for permanent and/or temporary addresses set up on the details page of the employee record.

When Adding a New Employee:

When adding an employee record manually into the system, you have the option to add an employee's address. When the address standardization configuration is turned on, their will be a check mark in the upper right to double check the address entered vs. the U.S. Postal Service:

| ✓ |
|-----------------------|
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| |
| |

Your staff member will then be able to see the submitted vs. the standardized address:

| persona | l information | address | information | 4 |
|-------------|---|--------------------------|-----------------------------------|----|
| SSN | | Street | 3140 Neil Armstrong Blvd | |
| irst Name | Jeremy | Street 2 | | |
| ast Name | Johnson | City | Eagan | |
| nitial | | State | MN | |
| Len | ress standardization | Standardize | d Address | |
| | 40 Neil Armstrong Blvd gan, MN 55121 | 0 | L ARMSTRONG BLVD MN 55121-2272 | |
| ax Selec | t which version of the address you | a want to use for this e | mployee. | ю. |
| ed | | Close | | |
| | | ciose | | |

When Updating or Adding an Address on an Existing Employee's Record:

When looking at the details page of the employee record, you can edit or add permanent or temporary addresses. If the address standardization option is turned on, there will be a checkmark available to compare the address entered to the U.S. Postal Service.

| addre | sses 🗸 | Permanen | t Use Tempo ! 📃 |
|----------|--------------------------|----------|-----------------|
| Street | 12 Water St. | | |
| Street 2 | | | |
| City | Shorewood | | |
| State | MN - | Zip Code | 55331 |
| County | Hennepin | School | |
| Country | United States of America | | |

Note Make sure you are viewing the address(Permanent or Temporary) you are trying to standardize before selecting the check mark.

| address stand | ardization | | | | |
|--|-------------------------------------|---|--|--|--|
| Submitted Addres | S | Standardized Address | | | |
| 12 Water St. Shorewood, MI | N 55331 | 12 WATER S EXCELSIOR, | | | |
| Select which version | on of the address you want to use t | for this employee. | | | |
| | | Job Title | | | |
| | | Close ow Heard of | | | |
| | | - How Hoard Da | | | |

Customer Address Standardization

Address Standardization can be turned on for:

- 1. Customer Address
- 2. Customer Billing Address
- 3. Worksite Address(es)

When Adding a Customer Record:

When adding a customer record into the system, you have the option to add a customer's main address. This address will be located on the details page of the customer record. When the address standardization configuration is turned on, their will be a check mark within the 'add new customer' window to compare the address entered vs. the U.S. Postal Service:

| customer | name | | other billing | | |
|-------------|--------------------------|---|------------------|-----------------------------------|---|
| Customer | TempWorks Software | | Phone 651-452-03 | 66 | |
| Department | Primary | | Email | | |
| main add | ress | ~ | sales informa | ation | |
| Attn. To | | | Account Manager | joshua.kramer joshua.kramer | Y |
| Street | 3140 Neil Armstrong Blvd | | Branch | High Tech SW | * |
| Street 2 | | | Sales Team | 0 None | ¥ |
| City | Eagan | | Active Date | 4/18/2019 | |
| State | MN | Ŧ | Terms | Payment Past Due 20 Days After Ir | + |
| Zip | 55121 | * | Note | | |
| Country | United States of America | | | | |
| Worker Comp | 8810 | * | | | |

When Adding or Editing the Addresses on the Customer Details:

The main address and billing address can be located on the customer details page. When you edit either of these addresses, you can select the check mark to review the standardized options:

| 🕼 🔶 🛧 👌 🔽 Search for Employees, Customers, Orders, etc. 🔍 | | | | JOSHUA.KR | AMER: High Tech Staffing | 音 🕐 🦛 📃 🗆 🗙 |
|---|-----------------------|--|------------------------------|-----------------|--------------------------|-------------|
| TempWo 3140 Neil Arn Eagan, MN (877) 452-037 | nstrong Blvd 55121 | are Solutions (Primary) ID: 779448 Branch: High Tech SE + ↓ G ★ ⊡ Q ↑ ↓ | No tasks to displa ► tasks a | | | ++0+ |
| visifile | custome | er information | | customer | status | |
| details | Customer N | ame TempWorks Software Solutions | | Status | A Active | ~ |
| assignment restrictions | Department | Primary | | Activation Date | 3/24/2014 | 8 |
| attendance contact methods | Customer ID | 779448 | | Date Created | 4/17/2008 2:31:00 PM | |
| departments | Parent ID | | ٩ | | | |
| interest codes sales & service | contact | information | → ✓ | billing add | iress | / * : 🔶 🗸 🗈 |
| education | Street 31 | 40 Neil Armstrong Blvd | | Attention To | | |
| vendor management worksites | Street 2 Su | Suite 205 | | Street | | |
| defaults | City Ea | gan | | Street 2 | | |
| documents | State MI | N – Zip | 55121 | City | | |
| integrations invoice history | Country Un | ited States of America | · · · | State | | - Zip |
| invoice setup | | | | Country | Inited States of America | V |

When Adding or Editing a Worksite:

Worksites are found under Details > Worksites on the customer record. When adding a new worksite, or editing an existing worksite, you can standardize the address with the check mark located within the 'setup worksite - details'

window:

| 📓 setup we | orksite - d | details | | | | |
|----------------------------|--------------|--------------------------|-------------|--|--|--|
| Details Jurisdiction(s) | worksite | details | | | | |
| | Active | × | | | | |
| | Worksite | Primary | | | | |
| | Attn To | | | | | |
| | Street | 3140 Neil Armstrong Blvd | | | | |
| | Street 2 | Suite 205 | | | | |
| | City | Eagan | | | | |
| | State | MN ~ | Zip 55121 ~ | | | |
| | County | | | | | |
| | School | | | | | |
| | Country | United States of America | | | | |
| | Time Zone | | Ψ | | | |
| | DST Observed | × | | | | |

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