

# 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:



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:




# 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, there will be a check mark in the upper right to double check the address entered vs. the U.S. Postal Service:



The screenshot shows a web form titled "add new employee" with a blue header. The form is divided into two columns: "personal information" and "address information". The "address information" column has a red checkmark icon in its top right corner, indicating that address standardization is enabled. The form fields are as follows:

| personal information |                | address information |                          |
|----------------------|----------------|---------------------|--------------------------|
| SSN                  | ____-____-____ | Street              | 3140 Neil Armstrong Blvd |
| First Name           | Jeremy         | Street 2            |                          |
| Last Name            | Johnson        | City                | Eagan                    |
| Initial              |                | State               | MN                       |
| Phone                |                | Zip Code            | 55121-____               |
| Cell                 |                | School District     |                          |
| Email                |                | Country             | United States of America |

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

The screenshot shows a web form titled "add new employee" with a blue header. The form is divided into "personal information" and "address information" sections. The "address information" section has a checkmark in the top right corner. A dialog box titled "address standardization" is overlaid on the form. It contains two columns: "Submitted Address" and "Standardized Address".

| Submitted Address  | Standardized Address   |
|--|--|
| <input checked="" type="radio"/> 3140 Neil Armstrong Blvd<br>Eagan, MN 55121 | <input type="radio"/> 3140 NEIL ARMSTRONG BLVD<br>EAGAN, MN 55121-2272 |

Below the table, the dialog box says: "Select which version of the address you want to use for this employee." and has a "Close" button.

**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.

The screenshot shows a form titled "addresses" with a blue header. At the top right, there are two checkboxes: "Permanent" (checked with a red box) and "Use Tempo" (unchecked with a yellow box). Below the checkboxes are several input fields:

|          |                          |          |            |
|----------|--------------------------|----------|------------|
| 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 standardization

| Submitted Address  | Standardized Address  |
|--|---|
| <input checked="" type="radio"/> 12 Water St.<br>Shorewood, MN 55331 | <input checked="" type="radio"/> 12 WATER ST<br>EXCELSIOR, MN 55331 |

Select which version of the address you want to use for this employee.

Close

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## 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, there will be a check mark within the 'add new customer' window to compare the address entered vs. the U.S. Postal Service:

? X
add new customer

|   |   |
|---|---|
| <p><b>customer name</b></p> <p>Customer <input type="text" value="TempWorks Software"/></p> <p>Department <input type="text" value="Primary"/></p> <p><b>main address</b> <span style="color: red; font-size: 24px; font-weight: bold;">➔</span> <input checked="" type="checkbox"/></p> <p>Attn. To <input type="text"/></p> <p>Street <input type="text" value="3140 Neil Armstrong Blvd"/></p> <p>Street 2 <input type="text"/></p> <p>City <input type="text" value="Eagan"/></p> <p>State <input type="text" value="MN"/></p> <p>Zip <input type="text" value="55121-____"/></p> <p>Country <input type="text" value="United States of America"/></p> <p>Worker Comp <input type="text" value="8810"/></p> | <p><b>other billing</b></p> <p>Phone <input type="text" value="651-452-0366"/></p> <p>Email <input type="text"/></p> <p><b>sales information</b></p> <p>Account Manager <input type="text" value="joshua.kramer joshua.kramer"/></p> <p>Branch <input type="text" value="High Tech SW"/></p> <p>Sales Team <input type="text" value="0 None"/></p> <p>Active Date <input type="text" value="4/18/2019"/></p> <p>Terms <input type="text" value="Payment Past Due 20 Days After Ir"/></p> <p>Note <input type="text"/></p> |
|---|---|

0 
 Save

For more information about adding customer records see [Customer Record Must Haves](#) .

**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:

TempWorks Software Solutions (Primary)  
 3140 Neil Armstrong Blvd  
 Eagan, MN 55121  
 (877) 452-0326

ID: 779448  
 Branch: High Tech SE

customer information

Customer Name: TempWorks Software Solutions  
 Department: Primary  
 Customer ID: 779448  
 Parent ID: [Search]

customer status

Status: A Active  
 Activation Date: 3/24/2014  
 Date Created: 4/17/2008 2:31:00 PM

contact information

Street: 3140 Neil Armstrong Blvd  
 Street 2: Suite 205  
 City: Eagan  
 State: MN Zip: 55121-\_\_\_\_  
 Country: United States of America

billing address

Attention To: [Text]  
 Street: [Text]  
 Street 2: [Text]  
 City: [Text]  
 State: [Text] Zip: [Text]  
 Country: United States of America

**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 worksite - details

Details  
 Jurisdiction(s)

worksite details

Active

Worksite: Primary

Attn To: [Text]

Street: 3140 Neil Armstrong Blvd

Street 2: Suite 205

City: Eagan

State: MN Zip: 55121-\_\_\_\_

County: [Text]

School: [Text]

Country: United States of America

Time Zone: [Text]

DST Observed

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