

# 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.

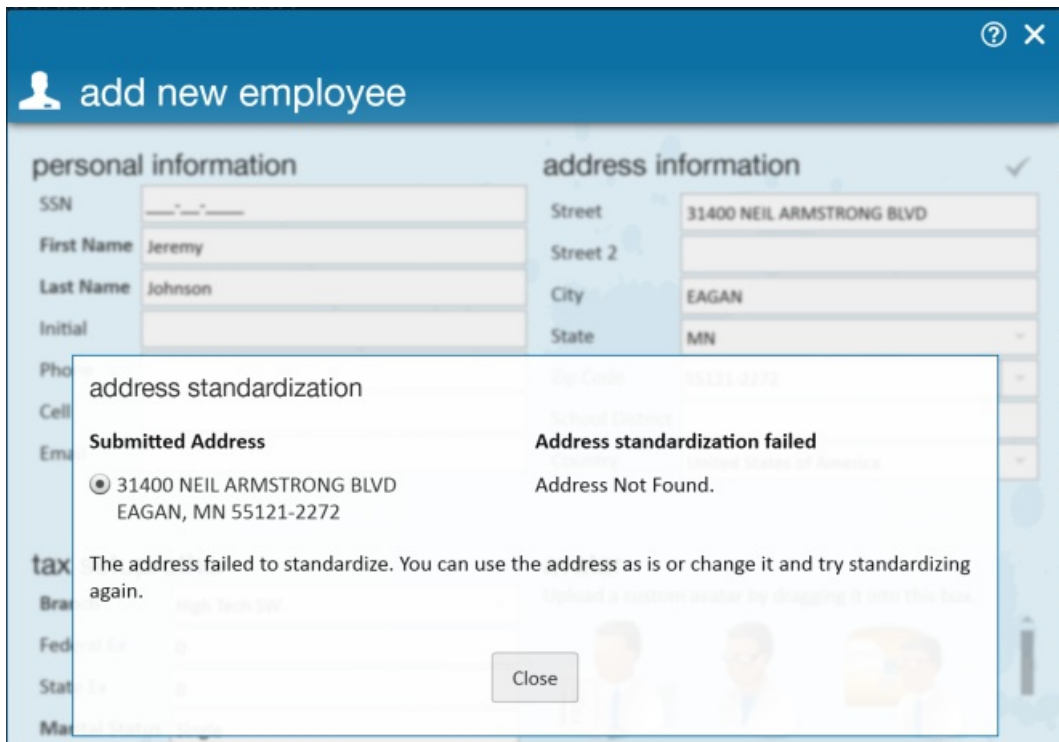
Ready to turn these configurations on? Talk to our [support team](#) today.

## 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:

**add new employee**

**personal information**

SSN: \_\_\_\_\_

First Name: Jeremy

Last Name: Johnson

Initial: \_\_\_\_\_

Phone: \_\_\_\_\_

Cell: \_\_\_\_\_

Email: \_\_\_\_\_

**address information** ✓

Street: 3140 Neil Armstrong Blvd

Street 2: \_\_\_\_\_

City: Eagan

State: MN

Zip Code: 55121-\_\_\_\_

School District: \_\_\_\_\_

Country: United States of America

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

**add new employee**

**personal information**

SSN: \_\_\_\_\_

First Name: Jeremy

Last Name: Johnson

Initial: \_\_\_\_\_

Phone: \_\_\_\_\_

Cell: \_\_\_\_\_

Email: \_\_\_\_\_

**address information** ✓

Street: 3140 Neil Armstrong Blvd

Street 2: \_\_\_\_\_

City: Eagan

State: MN

Zip Code: 55121-\_\_\_\_

School District: \_\_\_\_\_

Country: United States of America

**address standardization**

**Submitted Address**

3140 Neil Armstrong Blvd  
Eagan, MN 55121

**Standardized Address**

3140 NEIL ARMSTRONG BLVD  
EAGAN, MN 55121-2272

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

Close

**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.

**addresses** ✓ Permanent 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 standardization

Submitted Address

Standardized Address

12 Water St.  
Shorewood, MN 55331

12 WATER ST  
EXCELSIOR, MN 55331

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

Close

## 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:

**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:

**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

Attn To

Street

Street 2

City

State  Zip

County

School

Country

Time Zone

DST Observed

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