

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 standard addresses within the Azure Maps service. 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 Azure Maps 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 cannot be found in the Azure Maps database, a message will appear letting you know the address has not been found:

personal information

address information

SSN: _____

First Name: Jeremy

Last Name: Johnson

Initial: _____

Street: 31400 NEIL ARMSTRONG BLVD

Street 2: _____

City: EAGAN

State: MN

Phone: _____

Cell: _____

Email: _____

Submitted Address

31400 NEIL ARMSTRONG BLVD
EAGAN, MN 55121-2272

Address standardization failed

Address Not Found.

tax: The address failed to standardize. You can use the address as is or change it and try standardizing again.

Branch: _____

Federal Tax ID: _____

State Tax ID: _____

Mail: _____

Close

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:

personal information

address information

SSN: _____

First Name: Jeremy

Last Name: Johnson

Initial: _____

Street: 3140 NEIL ARMSTRONG BLVD ✓

Street 2: _____

City: EAGAN

State: MN

Zip Code: 55121-2272

School District: _____

Country: United States of America

Standardize Address

Date Last Standardized
4/18/2019 1:39 PM

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 Azure Maps service:

add new employee

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:

add new employee

personal information		address information	
SSN	_____	Street	3140 Neil Armstrong Blvd
First Name	Jeremy	Street 2	
Last Name	Johnson	City	Eagan
Initial		State	MN
Phone		address standardization	
Cell		Submitted Address	Standardized Address
Email		3140 Neil Armstrong Blvd Eagan, MN 55121	3140 NEIL ARMSTRONG BLVD EAGAN, MN 55121-2272
tax		Select which version of the address you want to use for this employee.	
Br		<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>	
Fed		<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>	
Stat		<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>	
Marital Status	Single	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>	

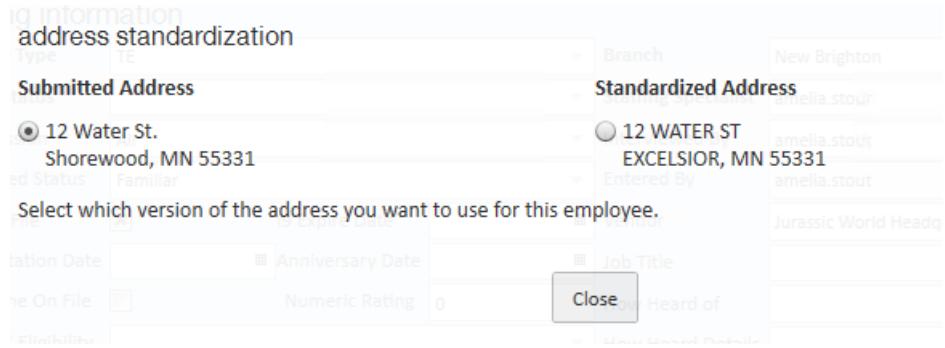
When Updating or Adding an Address on an Existing Employee's Record:

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 Azure Maps service.

addresses

<input checked="" type="checkbox"/> Permanent	<input type="checkbox"/> 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.



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 Azure Maps service:

add new customer

customer name	other billing
Customer TempWorks Software	Phone 651-452-0366
Department Primary	Email
main address ↗ ✓	
Attn. To	
Street	3140 Neil Armstrong Blvd
Street 2	
City	Eagan
State	MN
Zip	55121-_____
Country	United States of America
Worker Comp	8810
sales information	
Account Manager	joshua.kramer joshua.kramer
Branch	High Tech SW
Sales Team	0 None
Active Date	4/18/2019
Terms	Payment Past Due 20 Days After Ir
Note	

0 ⚠ ✓ Save

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

No tasks to display for your current filter settings

JOSHUA.KRAMER: High Tech Staffing

visfile	customer information	customer status
details	Customer Name TempWorks Software Solutions	Status A Active
assignment restrictions	Department Primary	Activation Date 3/24/2014
attendance	Customer ID 779448	Date Created 4/17/2008 2:31:00 PM
contact methods	Parent ID	
departments	contact information ↗ ✓	
interest codes	Street 3140 Neil Armstrong Blvd	billing address ↗ ✓
sales & service	Street 2 Suite 205	Attention To
education	City Eagan	Street
vendor management	State MN Zip 55121-_____	Street 2
worksites	Country United States of America	City
► defaults		State
► documents		Zip _____
► integrations		Country United States of America
► invoice history		
► invoice setup		

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

Street 3140 Neil Armstrong Blvd

Street 2 Suite 205

City Eagan

State MN Zip 55121-_____

County

School

Country United States of America

Time Zone

DST Observed

✓



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