Address Editor User Guide

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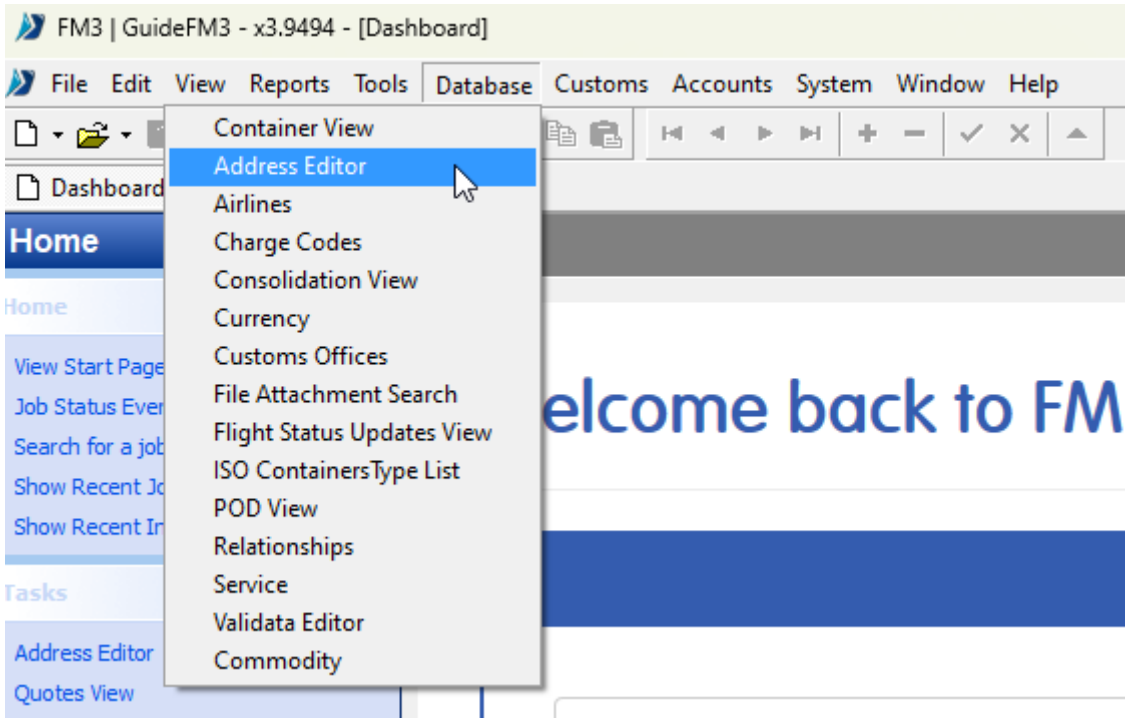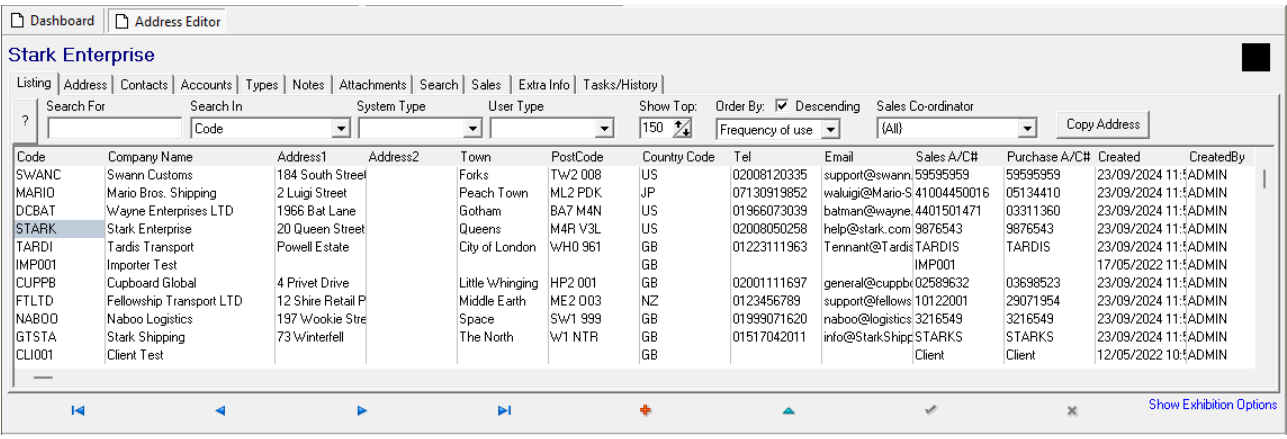
INTRODUCTION

FM3 has an address book feature for all companies and contact information, called Address Editor, under the Database menu.

Database Menu > Address Editor

Once open, it should already be populated with your addresses (if an import was previously organised) and Airlines (e.g., Air Canada).
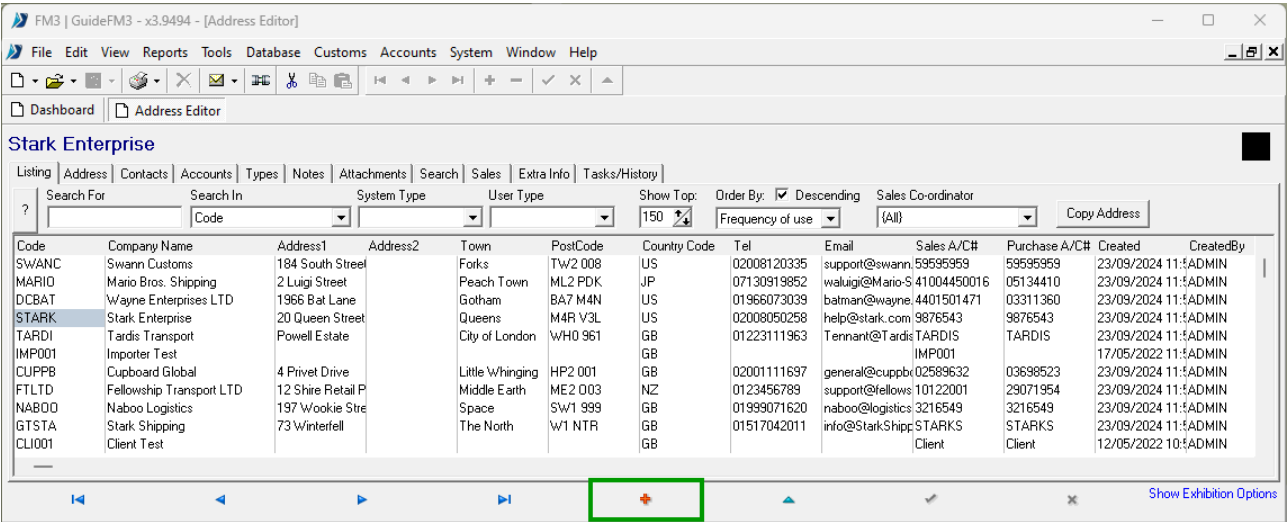

Address Editor > Listing Tab

CREATING AN ADDRESS

There are two methods to create an Address, through Address Editor and when within a Job Picker.
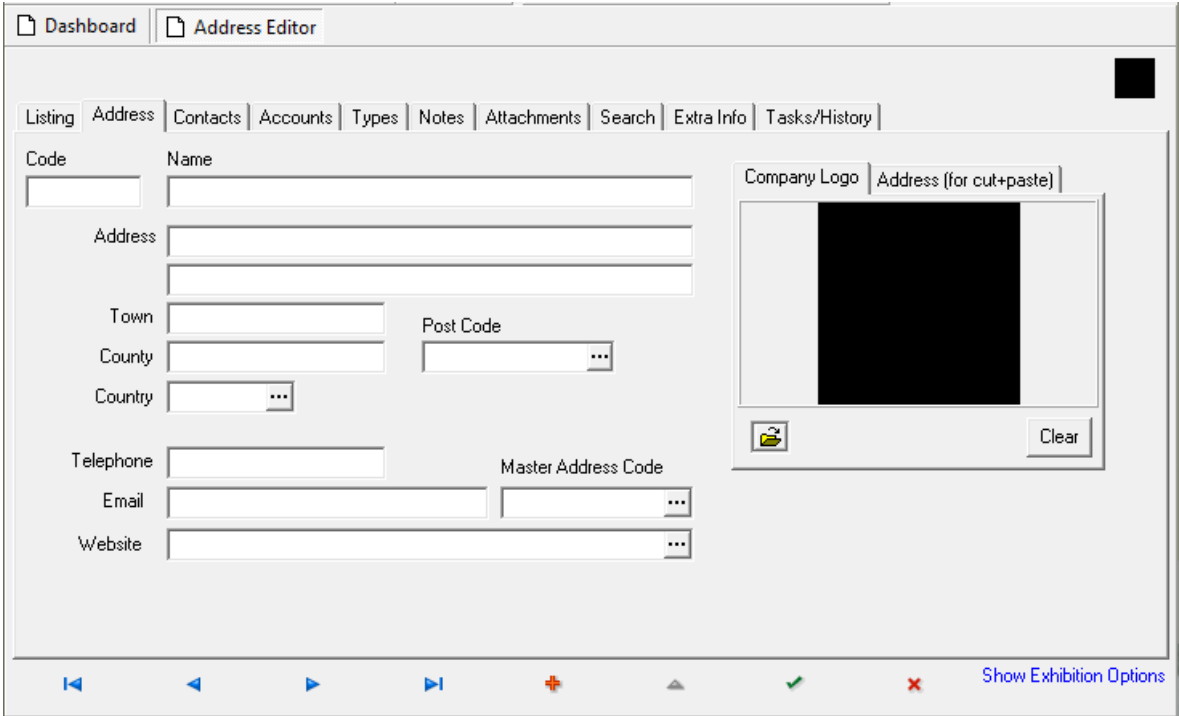
Via Address Editor

To add a new address, click the red plus symbol in the bottom bar.

Address Editor > Listing Tab (Red Plus Highlighted)

A blank Address Entry will open.

Address Editor > New Address Entry

Mandatory basic information includes:

- **Address Code** – The reference in jobs and other documents to pull through this address/ company information.

- **Company Name** – Name of the business for documents and printable reports.

- **Address** – This will be the location attached to jobs when this code is used (including Address lines, Town, County, Post Code & Country).
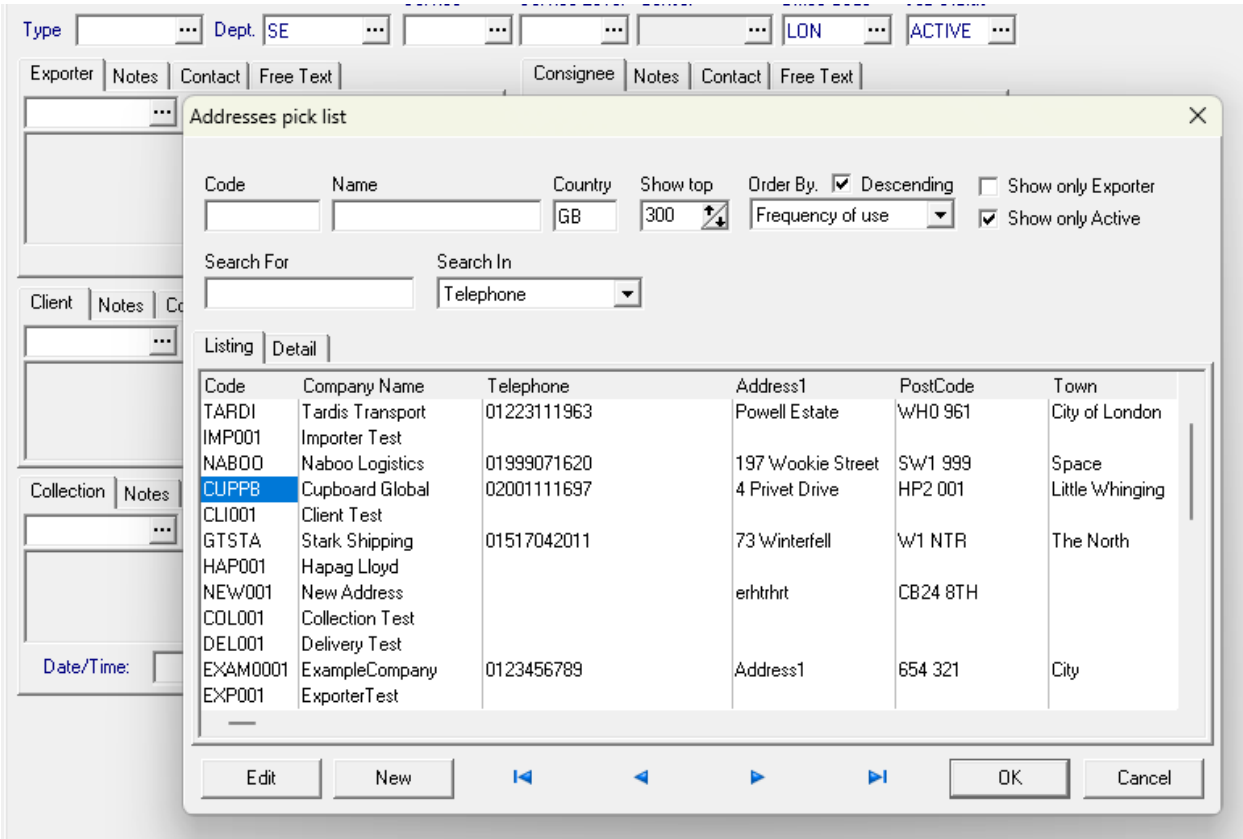

Address Editor > New Address Entry

Via Job Picker

A second way to access the addresses for editing is through a job. Open the address picklist with the '…' button next to the code boxes. This works for all Address Picker boxes (e.g. Exporter, Importer, Haulier etc.).
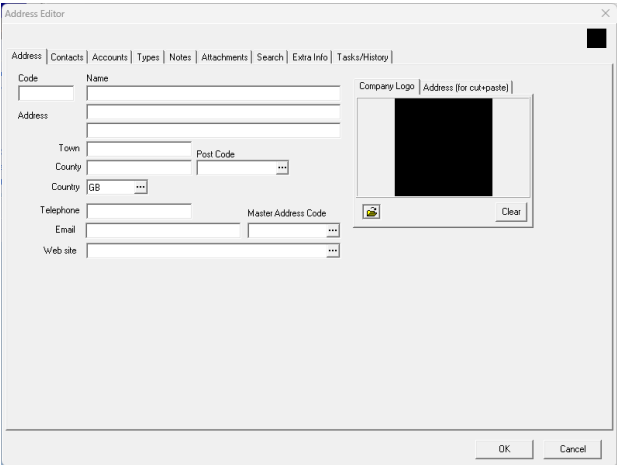

Export Job >

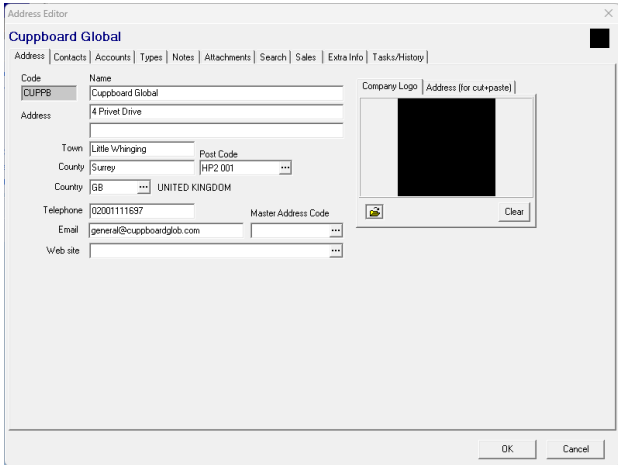This will open the 'Addresses Pick List'.

Export Job > Exporter Address Code Picker > Addresses Pick List

From here either click the 'Edit' button or the 'New' button to add or change an address.
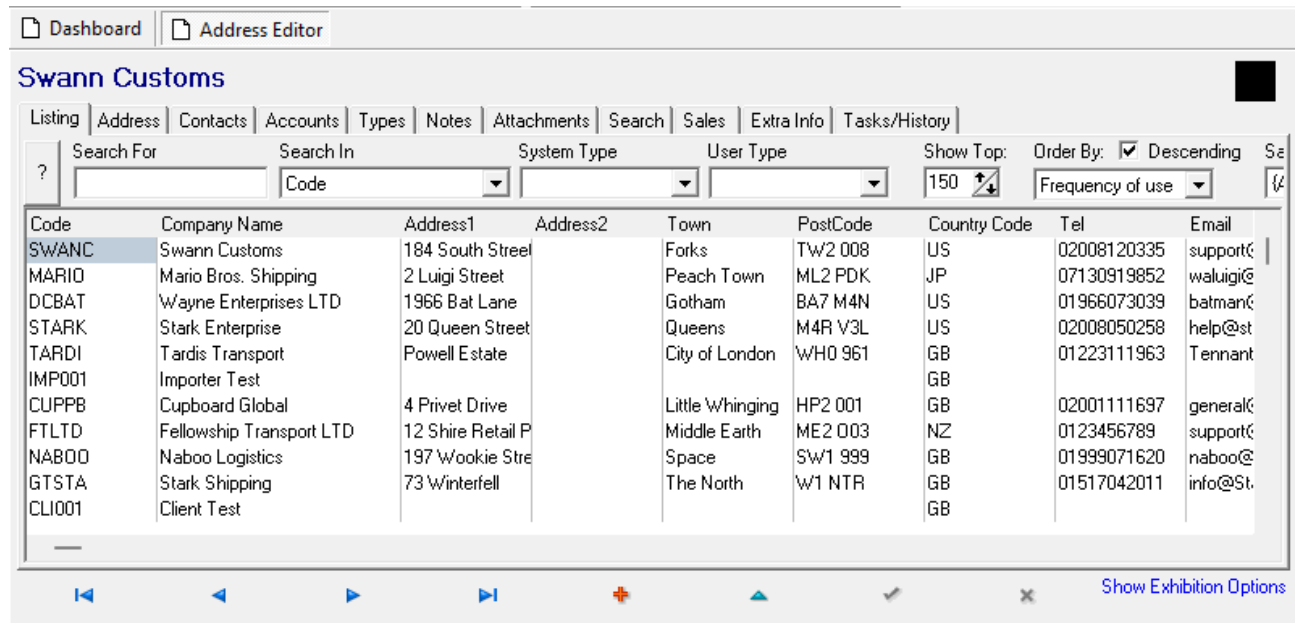

New

Edit

EDITING AN ADDRESS

Via Address Editor

To edit an address, search for the code or company name and, double click the address you want or select and click the 'Address' tab to edit.
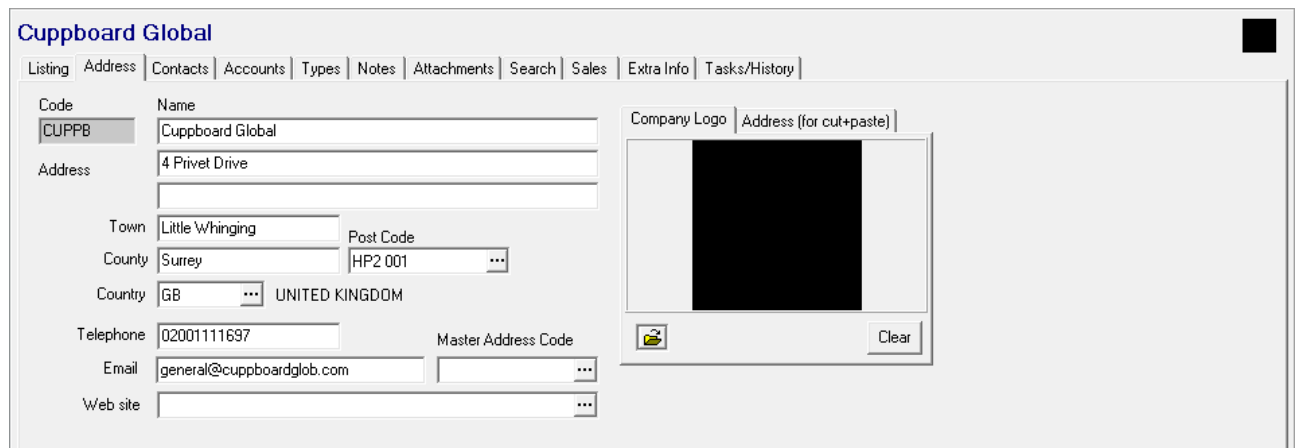

Address Editor > Listing

Address codes can't be edited; only the fields with a white background.

Address Editor > Address Tab

To save, click the green tick in the bottom toolbar or the save button at the top.

ADDITIONAL INFORMATION

Subsequent tabs will hold additional information, such as Contacts, Accounts and Types.

Contacts

Contacts can be attached to address entries. This will add a specific individual to the overall address and include them in jobs as an optional contact for the company.

Address Editor > Contacts Tab

Multiple individuals can be added via the Contact Details section within the Contact tab. Once all details are added to this tab, select the green tick and a new contact should be added to the grid above.

Accounts

The accounts tab contains the financial data connected to the company.

Address Editor > Accounts Tab

Sales A/C and Purchase A/C no are the account numbers set in your accounts package. Payment terms can be added and edited here (e.g., Immediately, 30 Days).

Types

Finally, Types, are categories which group addresses and sort them for use.

Address Editor > Types Tab

When in a job, selecting an address, you can sort by type to ensure addresses are in the correct fields.

Addresses Pick List > 'Show Only Exporter' Tickbox Highlighted

The most useful categories are Client, Collection, Consignee, Consignor, Delivery, Exporter, Haulier, Importer and Notify.

To save the entry, press the green tick in the bottom taskbar (from any tab).

Additional Help

If you need additional guidance, please get in touch with us via email or telephone.
Tel: +44 (0) 330 223 5813
Email: helpdesk@sigmafreight.com
Website: https://www.sigmafreight.com/support/

ADDRESS NOTES

Where to find

The notes section is located within address editor and is one of the tabs along the top.

This is the layout of the page. Its important to note that the two tool bars are separate and the bottom one acts on behalf of the whole address i.e. adding/editing an address. The higher tool bar in the middle is for the purpose of the notes section.

Adding a Note

To add notes to your addresses you need to create a note line you can start this by pressing the Plus + icon in the middle or by simply typing in a note ref in the box. This will create a temporary line press the tick ./ button to complete.

The actual note you want to add should be entered in the bottom section. Each time you make a change to the note save the change by pressing the tick Icon. To cancel editing the note press the cross X button and to delete the note press the minus - button.

How to Utilise

To Properly Utilise the note switch to the condition tab, this will bring up a list of checkboxes. On the left are all the address types if they have been filled in on the Types section of Address Editor then these will reflect that. On the right is the Priority setting of the note default medium.

The Types here will determine when the note will come into affect on an address field. For example if i don't have collection checked then when i add the client no note will show up where as if it was then it would show.

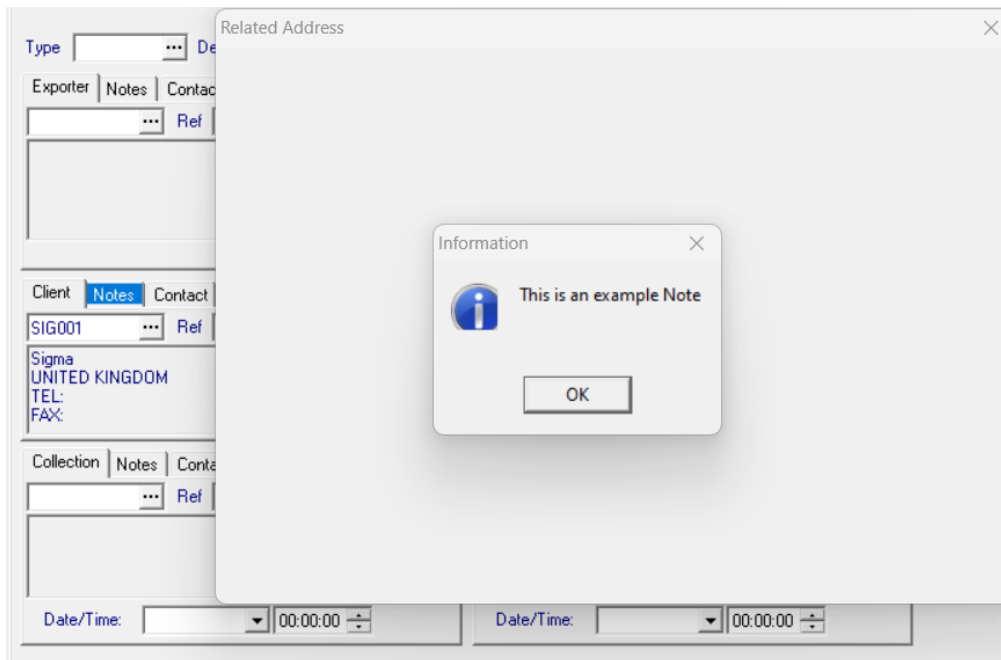The Priorities affect different attributes of the notes.

Low

Will highlight the notes tab and enter the note in the text field.

Medium

Works mostly the same as a low priority but will switch the current tab to the notes tab when the address code is entered.
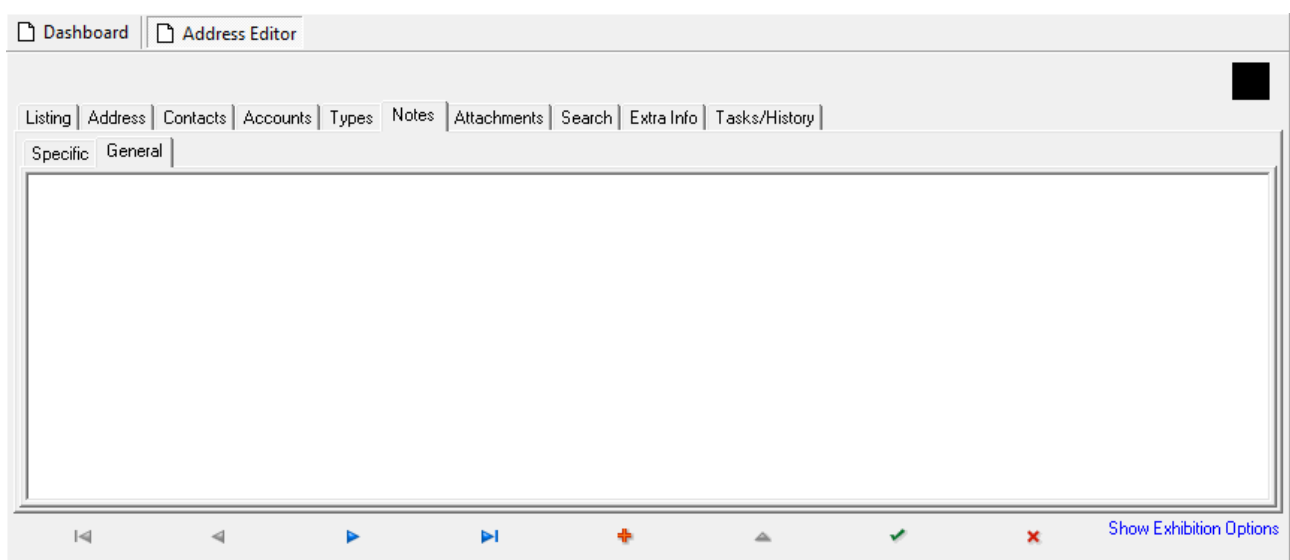
High

This will generate an alert into the users view that will display the note when the address code is entered. Note only appears when adding the address not every time on the open of the job. It will then act similar to the medium priority switching to the note tab.

General Tab

This tab is simply to add a note to the Address on Address Editor not used elsewhere in the system

Additional Help

If you need additional guidance, please get in touch with us via email or telephone.

Tel: +44 (0) 330 223 5813

Email: helpdesk@sigmafreight.com

Website: https://www.sigmafreight.com/support/