



Address Editor User Guide

Last Modified: November, 2024
Revision Number: 15

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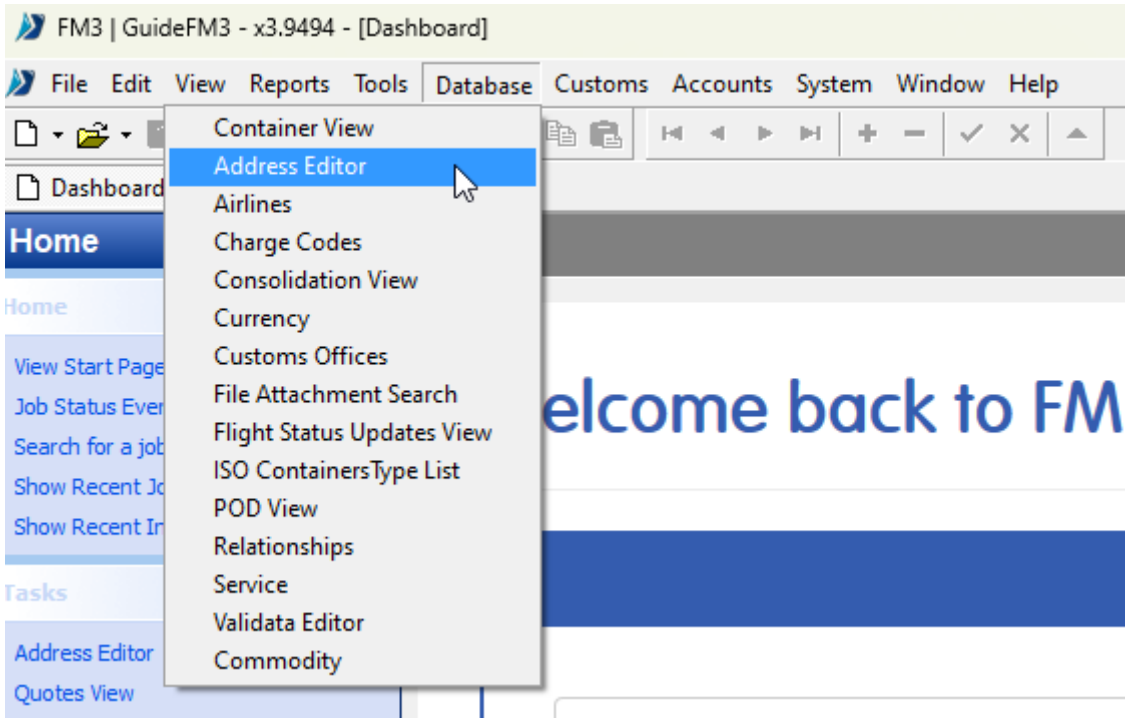
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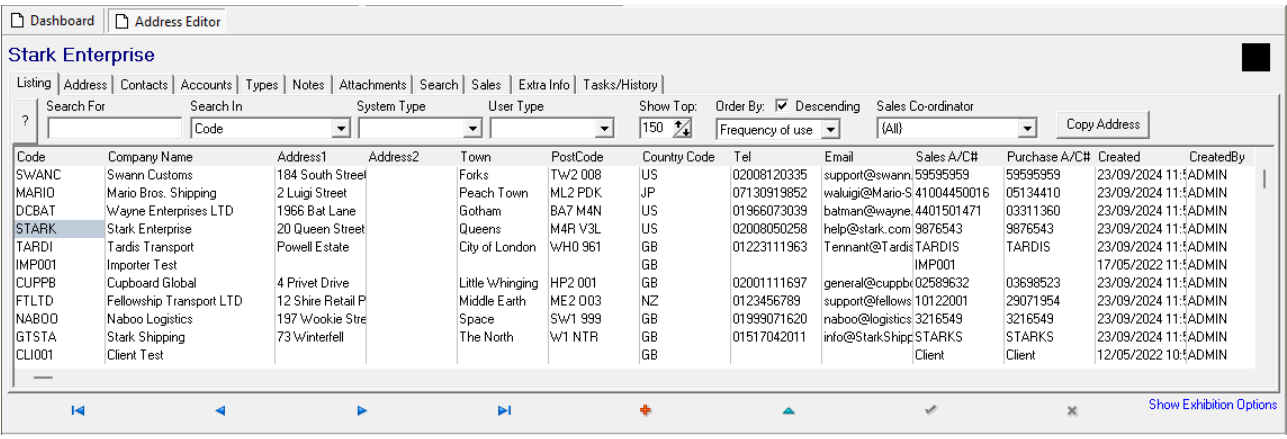
INTRODUCTION

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).



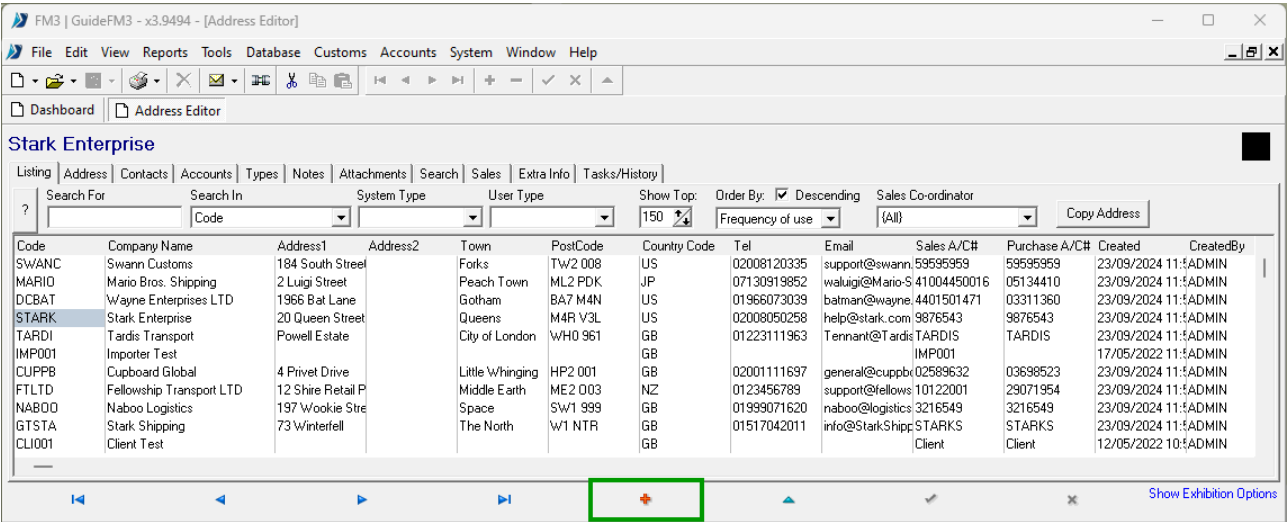
Address Editor > Listing Tab

CREATING AN ADDRESS

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

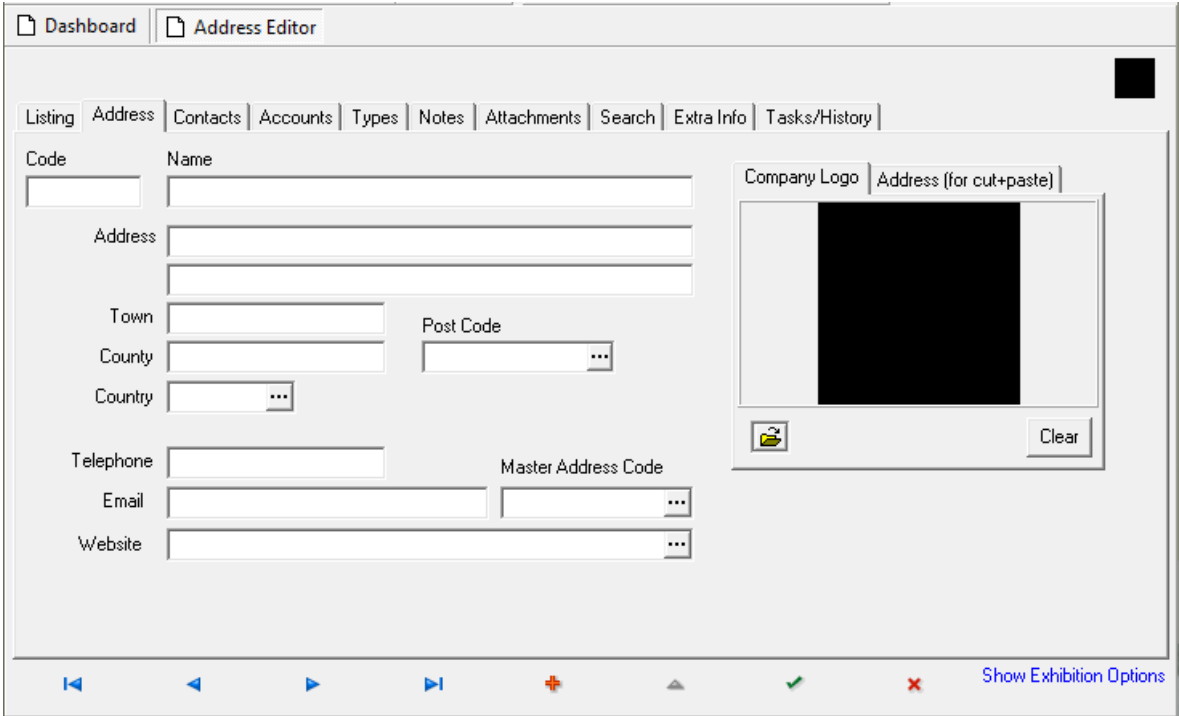
Via Address Editor

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).

The screenshot shows a form with the following fields:

- Code**: A text input field.
- Name**: A text input field.
- Address**: Two stacked text input fields.
- Town**: A text input field.
- County**: A text input field.
- Post Code**: A text input field.
- Country**: A dropdown menu.

Address Editor > New Address Entry

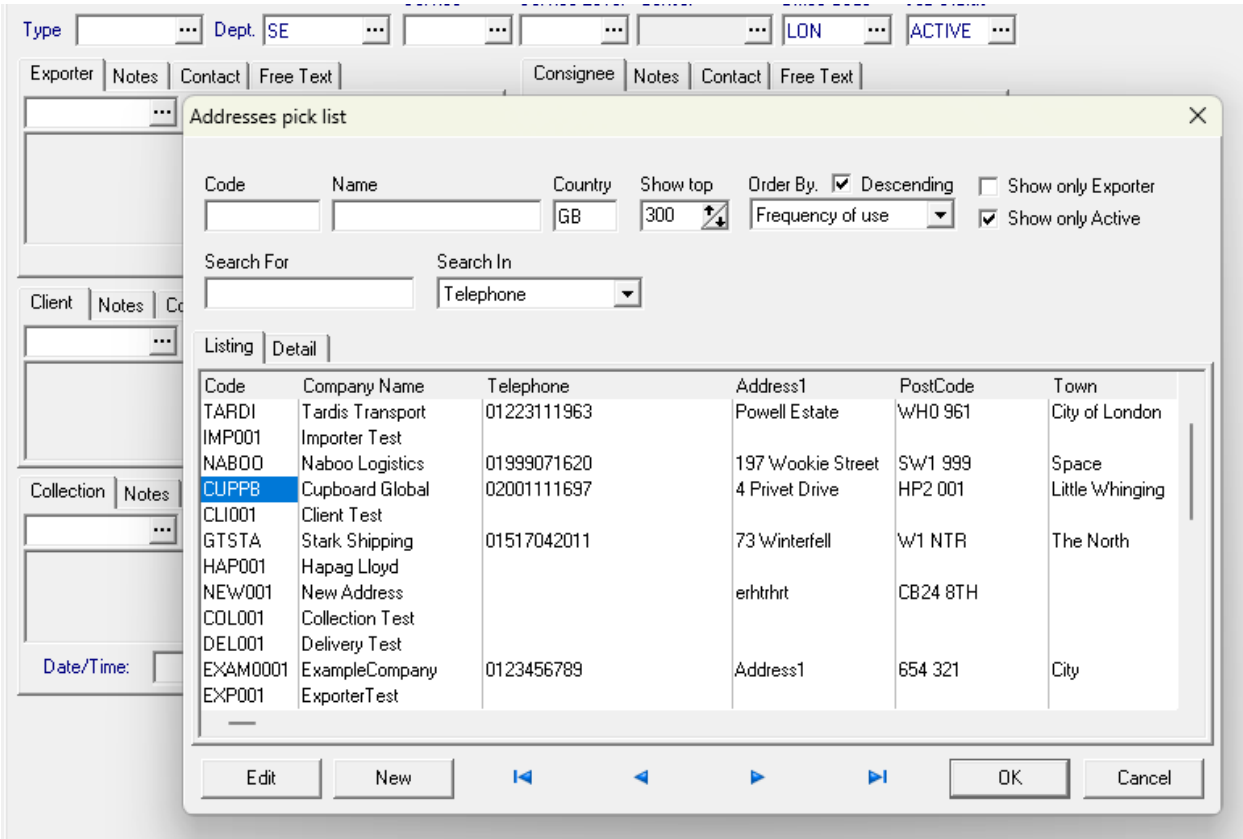
Via Job Picker

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.).

The screenshot shows the 'SE000015 Documents' window. On the left is a sidebar with 'Actions' including: Add New Document, Print Document, Document Status, Enter Charges, View Emails, View Job History, View attachments, and Copy Attachments. The main area has tabs for 'Header', 'Details', 'Goods Description', 'POD', and 'Items'. The 'Header' tab is active, showing fields for 'COD' (with a dropdown arrow), 'COC', 'GB', 'Type', 'Dept.' (set to 'SE'), and 'Service'. Below these are tabs for 'Exporter', 'Notes', 'Contact', and 'Free Text'. The 'Exporter' tab is active, showing a 'Ref' field and a large text area.

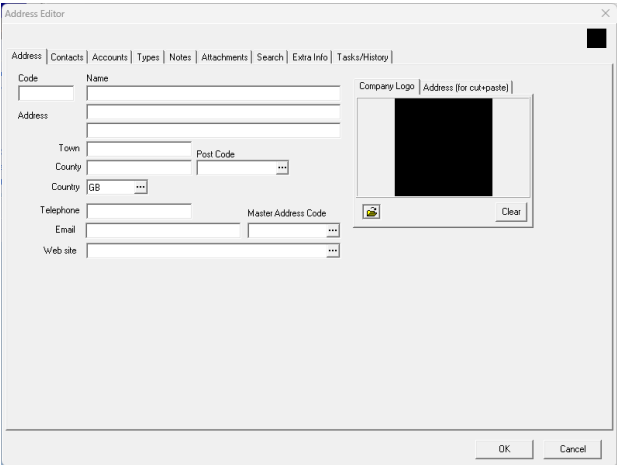
Export Job >

This will open the 'Addresses Pick List'.

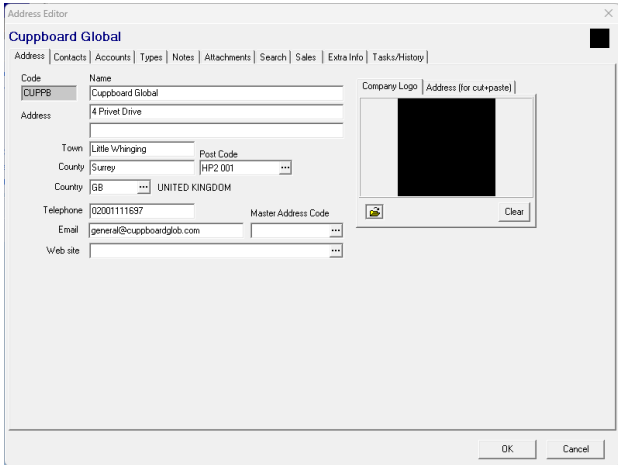


Export Job > Exporter Address Code Picker > Addresses Pick List

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



New

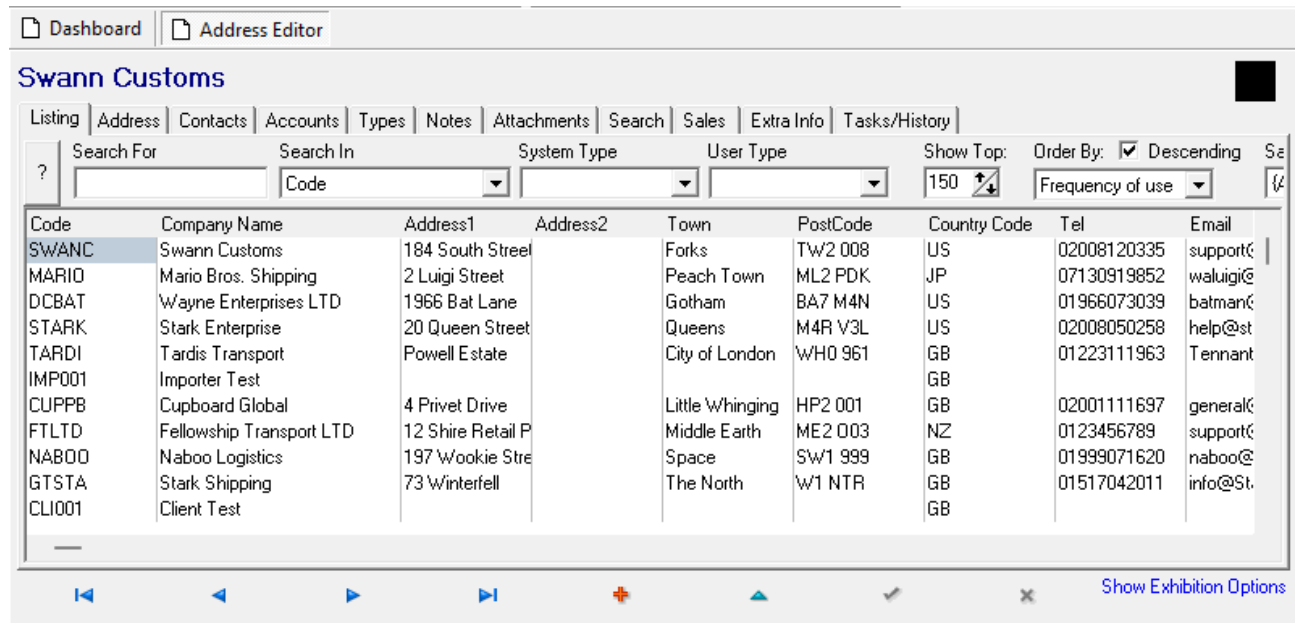


Edit

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.



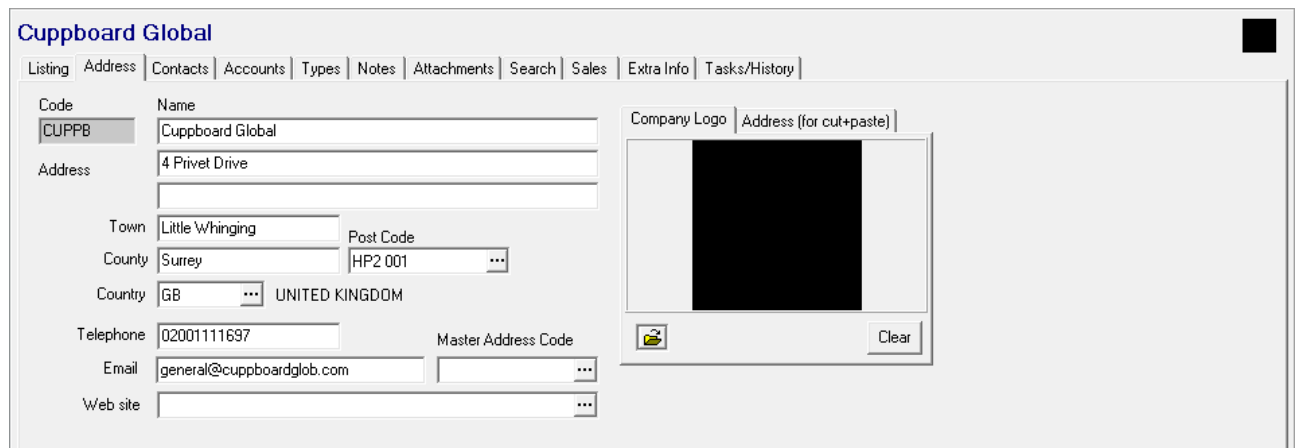
The screenshot shows the 'Address Editor' window with the 'Listing' tab selected. The window title is 'Swann Customs'. Below the title bar are tabs for Listing, Address, Contacts, Accounts, Types, Notes, Attachments, Search, Sales, Extra Info, and Tasks/History. The 'Listing' tab contains a search bar with 'Search For' and 'Search In' (set to 'Code'). Below the search bar is a table of addresses. The table has columns: Code, Company Name, Address1, Address2, Town, PostCode, Country Code, Tel, and Email. The first row is highlighted in blue.

Code	Company Name	Address1	Address2	Town	PostCode	Country Code	Tel	Email
SWANC	Swann Customs	184 South Street		Forks	TW2 008	US	02008120335	support@
MARIO	Mario Bros. Shipping	2 Luigi Street		Peach Town	ML2 PDK	JP	07130919852	waluigi@
DCBAT	Wayne Enterprises LTD	1966 Bat Lane		Gotham	BA7 M4N	US	01966073039	batman@
STARK	Stark Enterprise	20 Queen Street		Queens	M4R V3L	US	02008050258	help@st
TARDI	Tardis Transport	Powell Estate		City of London	WH0 961	GB	01223111963	Tennant
IMP001	Importer Test					GB		
CUPPB	Cupboard Global	4 Privet Drive		Little Whinging	HP2 001	GB	02001111697	general@
FTLTD	Fellowship Transport LTD	12 Shire Retail P		Middle Earth	ME2 003	NZ	0123456789	support@
NABOO	Naboo Logistics	197 Wookiee Stre		Space	SW1 999	GB	01999071620	naboo@
GTSTA	Stark Shipping	73 Winterfell		The North	W1 NTR	GB	01517042011	info@St.
CLI001	Client Test					GB		

At the bottom of the window is a toolbar with navigation buttons (back, forward, search, etc.) and a 'Show Exhibition Options' link.

Address Editor > Listing

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



The screenshot shows the 'Address Editor' window with the 'Address' tab selected. The window title is 'Cupboard Global'. Below the title bar are tabs for Listing, Address, Contacts, Accounts, Types, Notes, Attachments, Search, Sales, Extra Info, and Tasks/History. The 'Address' tab contains a form for editing the address. The form has fields for Code (CUPPB), Name (Cupboard Global), Address (4 Privet Drive), Town (Little Whinging), Post Code (HP2 001), Country (GB), Telephone (02001111697), Email (general@cupboardglob.com), and Web site. There is also a 'Company Logo' field and an 'Address (for cut+paste)' field. The 'Address' field is highlighted in blue.

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.

The screenshot shows the 'Address Editor' window with the 'Contacts' tab selected. At the top, there's a navigation bar with 'Dashboard' and 'Address Editor'. Below it, a sub-navigation bar includes 'Listing', 'Address', 'Contacts' (selected), 'Accounts', 'Types', 'Notes', 'Attachments', 'Search', 'Extra Info', and 'Tasks/History'. A table with columns 'ContactID', 'Role', 'Telephone', and 'Email' is visible, with a single empty row. Below the table is a toolbar with navigation icons and a red plus icon. The main section is titled 'Contact Details' and contains several input fields: 'ContactID', 'Salutation', 'Forename', 'Initial', 'Surname', 'Email', 'Web site', 'Role' (a dropdown menu), 'Telephone', 'Fax', and 'Mobile'. Each of these fields has a 'Preferred contact method' checkbox below it, all of which are checked. At the bottom of the window is another toolbar with navigation icons, a red plus icon, a green checkmark, a red X, and a 'Show Exhibition Options' link.

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.

The screenshot shows the 'Address Editor' window with the 'Accounts' tab selected. The interface includes a top navigation bar with 'Dashboard' and 'Address Editor'. Below this is a sub-navigation bar with tabs: 'Listing', 'Address', 'Contacts', 'Accounts' (selected), 'Types', 'Notes', 'Attachments', 'Search', 'Extra Info', and 'Tasks/History'. The main content area contains several input fields and dropdown menus for account details:

- Date Account opened:** A date picker showing '15'.
- Credit Limit:** An empty text field.
- Balance:** An empty text field.
- Sales A/C No:** An empty text field.
- Purchase A/C No:** An empty text field.
- Vat No:** An empty text field.
- Vat Ext.:** An empty text field.
- EORI:** An empty text field.
- Deferment:** An empty text field.
- Defer VAT Acct:** An empty text field.
- Representation Type:** A dropdown menu.
- Terms:** A dropdown menu with a '...' button.
- Invoice Frequency:** A dropdown menu with 'Per job' selected.
- Charge Currency:** A dropdown menu with 'GBP' selected.
- UNITED KINGDOM:** A dropdown menu.
- Invoice Currency:** A dropdown menu with 'GBP' selected.
- UNITED KINGDOM:** A dropdown menu.
- ☐ **Has Own Batch**
- ☐ **On Hold**

At the bottom, there is a navigation bar with icons for back, forward, and other actions, along with a 'Show Exhibition Options' link.

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.

The screenshot shows the 'Address Editor' window with the 'Types' tab selected. The interface includes a top navigation bar with 'Dashboard' and 'Address Editor'. Below this is a sub-navigation bar with tabs: 'Listing', 'Address', 'Contacts', 'Accounts', 'Types' (selected), 'Notes', 'Attachments', 'Search', 'Extra Info', and 'Tasks/History'. The main content area contains a list of checkboxes for different address types, organized into two columns:

- ☐ **Agent**
- ☐ **Airline**
- ☐ **Carrier**
- ☐ **Client**
- ☐ **Collection**
- ☐ **Consignee**
- ☐ **Consignor**
- ☐ **Competitor**
- ☐ **Delivery**
- ☒ **Active**
- ☐ **Depot**
- ☐ **Exporter**
- ☐ **Haulier**
- ☐ **Importer**
- ☐ **Notify**
- ☐ **Prospect**
- ☐ **Supplier**
- ☐ **System**
- ☐ **Customs**
- ☐ **CustomsWarehouse**

There are also buttons for 'Select All', 'None', and 'Invert'. A dropdown menu is visible next to the 'Prospect' checkbox. At the bottom, there is a 'Carrier SCAC code' field with a '...' button. The bottom navigation bar includes icons for back, forward, and other actions, along with a 'Show Exhibition Options' link.

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

Code: Name: Country: Show top: Order By: ☒ Descending ☐ Show only Exporter ☒ Show only Active

Frequency of use:

Listing | Detail

Code	Company Name	Telephone	Address1	Town	Sales A/C#
CUPPB	Cupboard Global	02001111697	4 Privet Drive	Little Whinging	02589632
NABOO	Naboo Logistics	01999071620	197 Wookie Street	Space	3216549
BA	British Airways		Waterside	Heathrow Airport	ba
VS	Virgin Atlantic		Crawley Business Quarter	Crawley	
CL	Lufthansa CityLine		Flughafen Köln/Bonn	Köln	
BD	British Midland Airways L		Donnington Hall		BD001
BE	Flybe British European	44 1392 366669	Exeter International Airport	Exeter	
SIGMA	Sigma	01489 12345678	17 Brunel Way	Fareham	
ZB	Monarch Airlines Limited		London Luton Airport	Luton	

Edit New < < > > OK Cancel

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

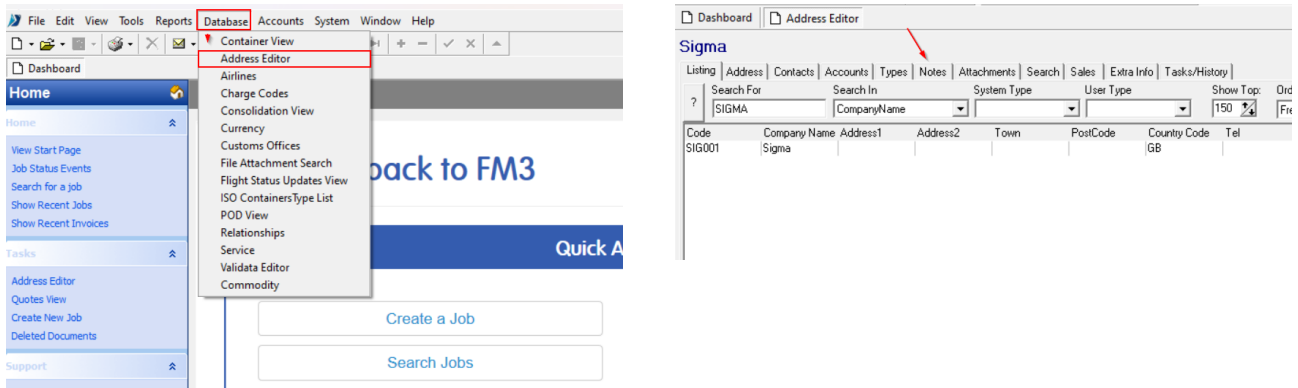
Email: helpdesk@sigmafreight.com

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

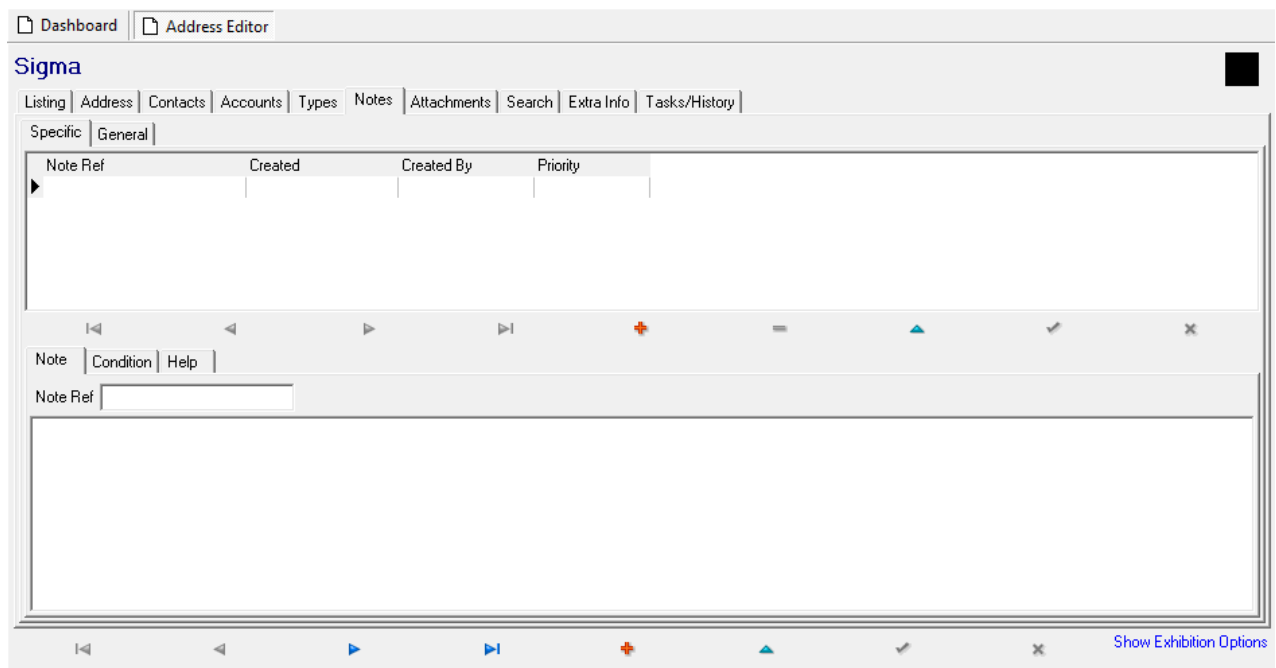
ADDRESS NOTES

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

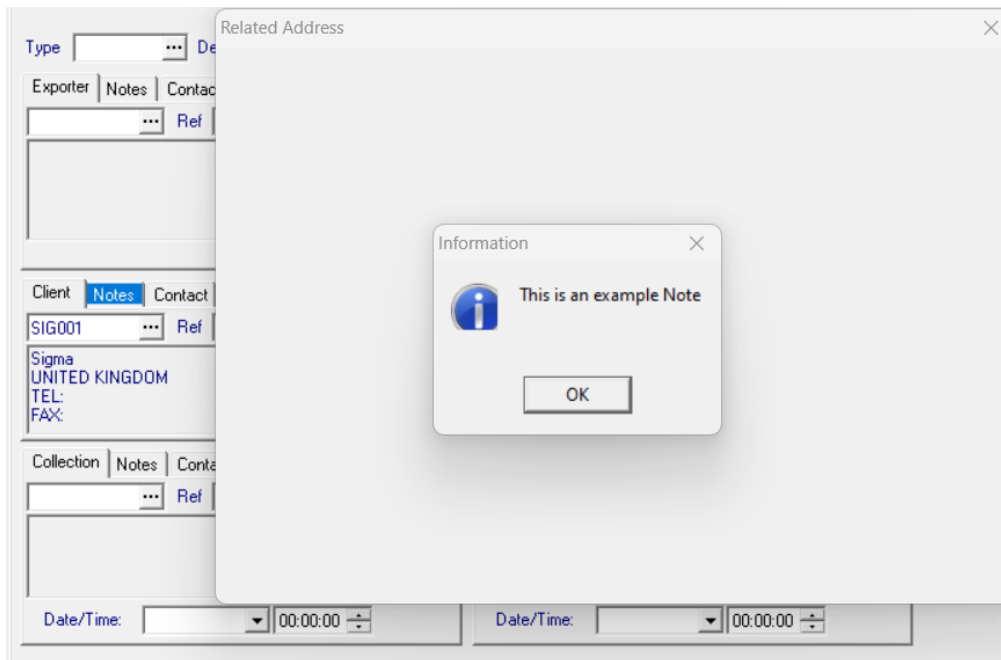
Will highlight the notes tab and enter the note in the text field.

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.

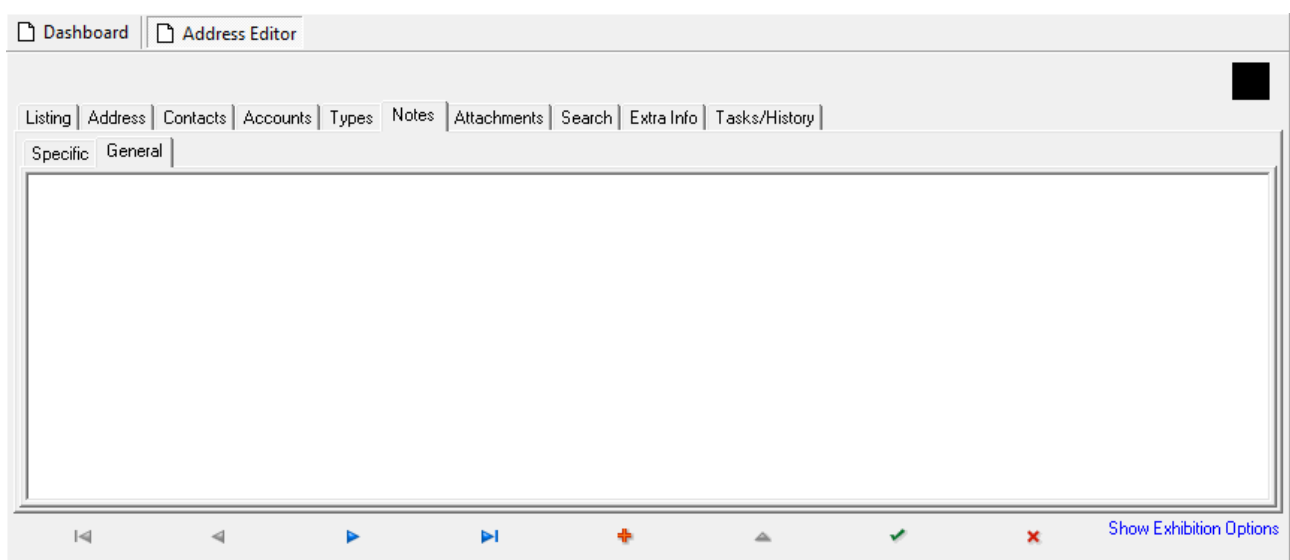
High

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/>
