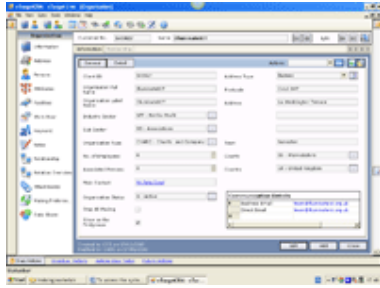
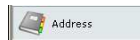


Change data on an organisation: Address



When you are working with the data you will sometimes find errors in the data, or information in the wrong fields. The information visible on the organisation form is of different types.

The organisation information on the left can be edited directly, the address and contact information is edited through the Address button on the left hand Organisation Information Bar.



Change the address:

Click the address button on the left of the screen, this will show any addresses associated with the organisation. Choose Add to add a new address or Edit to amend an Address.

Choose the Type of address: e.g. Business, Invoice, Postal etc. Then enter the information.

Please take care to ensure that the Town and post code are correct as this information is the most common searches.

To add or change communication details

At the top of the communication details box are four buttons, these are, from left to right.

	This button will export the data to a CSV file
	This will allow you add new information
	This button will enable editing
	This will delete information

Comm. Type	Details	Preferred
Business Email	team@illuminateict.or	Y
Direct Email	team@illuminateict.or	N

Remember to add all the communication types for the organisation including telephone numbers, fax numbers, general email etc.

You can declare an address or communication type to be the preferred address/method

Finally **CLICK THE SAVE BUTTON**

Illuminating Comments

These buttons are common to a number of forms

Ensuring you have the correct address and contact information is perhaps the most crucial part of any Customer Relationship Management (CRM) system. In the voluntary and community sector organisations change premises regularly so whenever you talk to them check the details.

NB: if the button is grey it is because you haven't got an organisation record active