



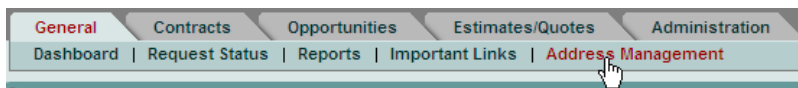
## Address Management Tip Sheet

**Introduction:** Cisco Service Contract Center enables you to search, create, edit and save installed-at site addresses using the Address Management tool. By managing your addresses, you can increase your productivity by proactively saving commonly used addresses onto your personal address book for quick referencing. For each installed-at site address, an ID number is automatically applied, which can be easily entered into the system and directly associated to the actual address on a quote. The ID number also helps increase the organization and tracks the consistency of all address entries in the database. This tip sheet will show you how to use the Address Management tool in Cisco Service Contract Center to effectively manage the Installed-At Sites you use most.

### Accessing the Address Management Tool:

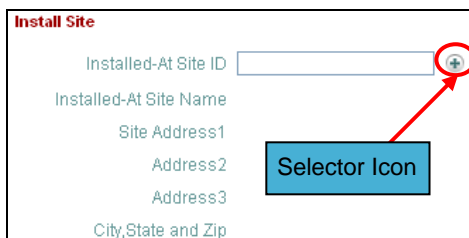
There are two ways to access the Address Management tool:

- 1) From the main CSCC window, roll over the General tab and click Address Management.



Caption: General Tabs, secondary menu

- 2) Or by clicking any Installed-At Site ID selector icon throughout the application.



Caption: Edit Line Item(s) window, Install Site section

### Searching and Saving an Address:

When creating quotes, every line item must have an installed-at site. To locate the installed-at site address, you can use the Address Management tool to look for the correct address and apply the associated installed-at site ID to the line items. For those commonly used addresses, you can save them to your personal address book for quick referencing. If you cannot find the address you are looking for, you can create a new address. Please reference the next section below, Creating a New Address, for more information.

The Address Management tool provides three different address views through the following tabs:

- Search Results – Displays the addresses based on the search criteria. You can save any of the listed addresses onto your address book.
- ViewAddressBook:Bill To – Displays the Bill To addresses comprised of the Bill To addresses of your registered contracts. To add a new Bill To address, you must contact Cisco support.
- ViewAddressBook:Install Site – Displays your saved installed-at site addresses in chronological order so that you can re-use them to add installed-at site IDs to quote lines or filter screen options when using selectors.

Follow these steps to search for an installed-at site address and save it to your personal address book:

1. On the Address Book screen, enter or select entries for all required fields, indicated by a red asterisk. Then click 'Search for Site'.

**Note:** As a best practice, always enter as much information as you know about the address to help speed-up the search process. Entering only one or few characters will decrease performance of the search since thousands if not millions of address records may exist for a very simple query.

2. View the search results in the 'Search Results' tab.

**Note:** The maximum number of addresses that can be shown is 200. If the search results return more than 200 addresses, you will be asked to refine the search.

3. Click the checkbox next to the address you want to save to your address book.

**Note:** If you are editing a line item and wish to apply a new site, click the 'Select Site' button. This also applies if you are attempting to select a site value to appear when using the Site Selector to search for a specific site.

4. To save the site to your records so that you can reference it easily in the future, click 'Add Site to Address Book'. The address will be listed under the ViewAddressBook:Install Site tab.

The screenshot shows the 'Address Book' search interface. A red box highlights the search filters, including fields for 'Installed-At Site Name' (with 'xyz' entered), 'Country' (set to 'United States'), and 'Address 1'. A blue callout box labeled 'Step 1: Populate search criteria and click 'Search for Site'' points to the 'Search for Site' button. Another blue callout box labeled 'Step 3: Click checkbox' points to the checkboxes in the search results table. A third blue callout box labeled 'Step 4: Click 'Add Site to Address Book'' points to the 'Add Site to Address Book' button. The search results table contains the following data:

Site Name	Customer Number	Site ID	Address 1	Address 2	Address 3	City	State/Province	Postal Code	Country	Status	Parent Company/GU
XYZ	832074	1598567	1 SAN JOSE STREET			MOUNTAIN VIEW	CA	94040	UNITED STATES	Active	XYZ CORPORATION
XYZ	832074	2091371	13 MAIN							Active	
XYZ CORPORATI	1042487	2210467	333 RAVENSWOOD							Active	
XYZ CORPORATI	1042487	2231178	95 WEST ALGONQUIN			ARLINGTON HEIGHTS	IL	60005	UNITED STATES	Active	XYZ CORPORATION
			20010 WEST			HOFFMAN					

Caption: Address Book screen

### Creating a New Address:

In order to create a new installed-at site address, you must first perform a search using the address information to verify that it doesn't already exist in the database. This helps keep records clean by ensuring that no duplicate addresses are created. Once an address search is performed, the 'Create New' button is enabled. If no results were found or if none of the search results correspond to the address you want, you can proceed to create a new address. Follow the steps below to create a new site:

1. After performing a search, if no results are found that match your address needs, click the 'Create New' button.

The screenshot shows the 'Address Book' search results interface. The search results table is empty, displaying the message 'No data found for the search criteria.'. The 'Create New' button is highlighted with a red circle. The search filters are visible at the top of the table.

Caption: Address Management, Address Book tabs

2. The Address Book (Create New Site) window will appear. Enter all the information about the address that you have available. At a minimum, you must enter the address information in the required fields, indicated by the red asterisk.

**Note:** For the Customer Name field, you may select an existing customer name or create a new customer name. Options under the Customer Name field are based on your original search entry in the Installed-At Site Name field. The tool will provide customer names that closely match the installed-at site name.

Address Book (Create New Site)

Site Details

\*Customer Name Select One

\*Country United States

\*Address 1

Address 2

Address 3

\* City

\* State/Province Select One

\* Postal Code

\*Indicates a required field

Cancel

Step 2: Populate site details

Step 3: Click 'Create New Site'

Create New Site

Caption: Address Book (Create New Site) pop-up window

3. Click 'Create New Site'. Once the address has been validated, it will automatically be saved to your Install Site address book.

**Note:** When new addresses are created, they need to be validated by the system through Export Compliance checks. This may result in a quote line associated with the address becoming invalid after initial creation. If this occurs, wait 1-2 hours before re-validating your quote. If you are still unable to validate the line after 24 hours, open a case.

#### Editing and Deleting an Address:

In the event that you no longer use an address and wish to remove it from your personal address book, you can delete it. Deleting an address will only remove it from your address book and not the database. In addition, you can update an address information by making minor edits if necessary. For example, if an address was accidentally entered as an 'avenue' rather than a 'street', you can make updates using the Address Management tool. You cannot make any changes to the City, State/Province, Postal Code, and Country fields to an address as this is a major change and may require a new address to be created.

Follow these steps to edit or delete an installed-at address from your address book:

1. From the View AddressBook:Install Site tab, click the checkbox next to the address you wish to edit or delete.
2. Click the 'Edit' or "Delete' button.
3. If you clicked the 'Edit' button, the Installed-At Site Address window will appear. Here you can enter the new installed-at site address information.  
**Note:** The City, State/Province, Postal Code, and Country fields cannot be edited. If your address changes require any of these fields to be updated, please search for the install site address to see if it is already in the system, or create a new install site address.
4. Click 'Send Request'. Your address change request will be processed within 48 hours.

Caption: Installed-At Site Address, Edit pop-up window

### Managing Addresses Using Upload Template:

Installed-at site addresses can also be searched and created using the upload template when quoting. Within the template, you must provide sufficient address details for the system to search or create an address. At a minimum, the Install Site Name, Address 1, City and Country fields must be populated for the system to perform a search. To create a new address, all the required address values for the installed-at site must be applied. For that reason, it is important to apply all the address information that you have available when adding lines using the upload template.

It is recommended to use the upload template if you are managing a large number of installed-at site addresses. Please reference the Address Management Using the Upload Template section of the [Large Quotes Job Aid](#) for more information.

#### Related Links:

CSCC Training Website: [Click Here](#)

CSCC User Guide: [Click Here](#)

Large Quotes Job Aid: [Click Here](#)