



Addresses

Planon Software Suite

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols



	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Addresses

This document contains information on how to manage the address data of your internal and external business contacts and how to register addresses and contact person data effectively and centrally in Planon ProCenter.

Addresses and contact persons are linked together in the Addresses TSI, which is the ideal tool to monitor and update address data. The Addresses TSI can help streamline all your address-related processes. Whether you want to add, modify, or delete address data, transfer addresses to the archive, or link contact persons to addresses: the standard Addresses TSI offers plenty of functionality to do this.

The design of the Addresses TSI, with its selection levels and steps, enables you to access any required address data using various selection options.

Addresses - Concepts

For a better understanding of Addresses , this section describes the concepts available in this TSI and how they interact with each other.

In Planon ProCenter, the Addresses TSI differs from the structure of other standard TSIs. The first selection level is the **Components** selection level; the **Properties** selection level is not available at all.

At the **Components** selection level, you can define a selection via the address-related selection steps **Address type**, **Address category** and **City**. These selection steps will help you make useful and logical selections of addresses or allow you to enter new addresses.

You can add a new address or try to find an existing one at the **Components** selection level.

You can view your organization's entire address list at the **Addresses** selection level.

See the links below for more information:

- [Components](#)
- [Address type](#)
- [Address category](#)
- [City](#)

Components

The **Components** selection level is designed to approach addresses from a specific angle, you can get information from: **Address type**, **Address category** and **City** selection steps.

Address type

An address type indicates the role an address plays in the business processes of your organization. For example, an address of the **Supplier** type refers to a company that provides your organization with office supplies.

You can use the **Address type** selection step to add or retrieve addresses of a particular address type. By selecting an address type in this selection step, you can retrieve all addresses of this particular type at the **Addresses** selection level.

If you select an address type at the **Components** selection level and add a new address at the next level, the **Address type** field will automatically inherit the name of the selected address type. If you want to work with prefiltered pick lists in other TSIs which must

contain only the addresses of a particular address type, you can define this in the **FieldDefiner** TSI.



For more information on prefiltered pick lists, refer to the *FieldDefiner* documentation.

Address category

An address category indicates the primary function of the company that deals with your organization. For example, an address in the **Cleaning Company** category represents a company that cleans your organization's office buildings.

You can use the **Address category** selection step to retrieve addresses of a particular address category. You can maintain the address category list in the **Pick lists** TSI that is launched from within the Supporting data navigation group.



For more information on maintaining pick lists, refer to the *Field definer* documentation.

By selecting an address category in the **Address category** step, you can retrieve all addresses of this particular address category at the **Addressess** selection level.

If you select an address category in the **Address category** selection step and then descend to the **Addresses** selection level where you add a new address, the **Address category** field will automatically inherit the previously selected address category.

City

You can use the **City** selection step to specify where a particular business contact is located or to access addresses in a particular city.

Planon ProCenter contains a standard city list; as a result, you cannot add, modify or delete cities in the element section.

Working with Addresses

In Planon ProCenter you can edit your contacts' address data at the **Addresses** selection level. Depending on the selections you made at the **Components** selection level, a specific set of addresses and associated contact data is available at this selection level. Here you can modify the address data or link new addresses to the selected criteria.

See the links below for more information:

- [Adding an address](#)
- [Copying addresses](#)
- [Archiving an address](#)


Adding an address

This section explains how to add a new address.

Procedure

1. Go to the Addresses selection level.
2. From the action panel, select Add.
3. Complete the fields in the data panel.
For more information on the available fields in General and Miscellaneous tabs, refer to Address data.
4. Click Save.

A pop up is displayed to specify if you want to create contracting parties for this address. If you select **Yes**, the address is added as a contracting party in Contracts > **Components** > **Contracting parties**.

 Whether this confirmation pop-up is shown, depends on the settings in **Approved messages**. If you want to suppress message display, you can add the message to **Approved messages** with a default selection of either **Yes** or **No**. For more information on Approved messages, see [Approved messages](#).

If you update an address, Planon will also update the name of the contracting party (after your confirmation).

Copying addresses

If you want to reuse address data for another contact, you can copy addresses using the **Copy** option on the action panel. In that case you only need to modify the data that are unique for that contact.

Archiving an address

Planon ProCenter enables you to transfer address data to the digital archive via the **Transfer to archive** option on the action panel. Once addresses and their data are in the archive they can be viewed, but no longer be modified. To modify archived data, you must first retrieve the relevant address from the archive.

The ability to transfer an address to the archive depends on your settings and authorizations. Moreover, if an address is used in a referencing field on an active order, for example **External tradesperson**, it cannot be archived.



Although you will receive a warning, you can archive addresses even if there are non-archived:

- Contact persons present
- Visitors present

Maintaining address types

On the **Address type** selection step, you can maintain the **Address type** pick list. These address types can be accessed from various TSIs in Planon ProCenter. With the appropriate authorization, you can define up to ten address types.

Follow the below procedure to activate an address type:

Procedure

1. At the Components selection level, select the Address type selection step.
2. Click the Type [Type + no.] you want to activate and enter an appropriate name in the Type field.
3. In the Is active field, select Yes and click Save.

The address type is now displayed on the Addresses selection level > General tab > in the pick list of the Address type field.

Contact persons

To manage your contacts in a flexible manner, you can enter the contact persons for your business contacts at two selection levels in Planon ProCenter.

In Planon ProCenter you can add or modify **Email address** of a contact persons per address at the **Addresses** selection level and, if you wish, you can add additional contact persons at the **Contact persons** selection level.

In other TSIs, if you link addresses to elements you can view the corresponding contact persons in the address data dialog box.

In addition, you can link contact persons to elements manually through the contact persons list you created at the **Contact persons** selection level. The contact persons you add at the **Contact persons** selection level will automatically be added to the Personnel TSI at the **People** selection level.

Refer to [Contact persons fields](#), for a table that lists and describes the contact person fields on the **Contact person** selection level that need further explanation. The listed fields are available at the **Contact persons** selection level, on the **General** and **Miscellaneous** tabs.

Contact person data

At the **Addresses** selection level you can add **Email address** of a contact person for the selected address.

At the **Contact persons** selection level you can add additional contact persons for your business connections. The contact persons you specify here are also adopted in the Personnel TSI. As a result, you can access the contact persons in people fields that are available in other TSIs.

Archiving contact persons

Planon ProCenter enables you to transfer contact person data to be retained to its people archive via the **Transfer to archive** option in the action menu. This functionality applies to the contact persons who were added at the **Contact persons** selection level.

Tip

For more information on archiving persons, refer to the Personnel part of the Planon ProCenter user documentation

Addresses - Field Descriptions

Address fields

Field Name	Function
Code	If you add an address, in this field a code will automatically be specified by Planon ProCenter. In FieldDefiner you can define the code format for this field. You can modify the value.
Address type	<p>You can specify the address type of the selected address in this field, for example Supplier. One or more types can be selected using the check boxes in the Address types window.</p> <p>The address types visible in the element section on the Components tab > Address Types selection step will be available in all Address Type field's drop down list. Address types that have not yet been defined (Type #) will not be available in the drop down list. For more information on address types, refer to the Address type section.</p>
Category	<p>You can specify the address category in this field, for example Cleaning Company, by using the pick list in this field.</p> <p>The choices available correspond to the elements shown in the element section in the Address category selection step. For more information on address categories, refer to the Address category section.</p>
Phone number	Enter a phone number for the selected address.
Website URL	Enter the link to the website of the selected address.
CP1: E-mail	The business e-mail address for the selected address. In the Work Orders TSI, if you link an address to an order and subsequently create a form and e-mail it to the contact person concerned, this e-mail address is automatically specified in the e-mail message.
Internal linked file	In this field you can enter a comment about the selected address.
Linked file	In this field you can enter a link to any desired file, which can be viewed when you click the view button in this field.

Field Name	Function
	Only files with the extension jpeg, jpg, gif, or png can be made visible below the Linked file field and in the Picture window that will appear when you click the view button.

Contact persons fields

Field	Description
Code	If you add a contact person, Planon ProCenter will automatically specify a code in this field. In Field definer you can define the code format for this field. You can modify the value.
Person type	<p>Here you can specify whether the contact person is for example an Internal coordinator or an External contact person. You can select one or more types can be selected by using the check boxes in the Person type window.</p> <p>The person types visible in the element section on the Components tab > Address Types selection step will be available in the Person Type field's drop down list. Person types that have not yet been defined (Type #) will not be available in the drop down list.</p> <p>For more information on person types, refer to the Personnel part of the documentation.</p>
E-mail	The e-mail address of the contact person. In the Work Orders TSI, if you link a contact person to an order and subsequently create a form and e#mail it, this e-mail address is automatically specified in the e-mail message.
Occupancy rate	Indicates the percentage of work time a contact person is located in a particular space. For more information on this, refer to the Spaces & Workspaces part of the documentation.
Cost center	Here you can link a contact person to a particular cost center. You can select a cost center from a list. Cost centers are used in the Budgets TSI to provide insight into the costs incurred by different departments.
Tariff group	Here you can specify the Tariff group to which a contact person belongs. In the Work Orders TSI, the tariff group is used to calculate estimates and labor hours.

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