



here's info needed to....

Associate Addresses, Phone Numbers, and Email Addresses in the Workgroup

Why is it efficient?

Many times, there are many participants in each workgroup. Associating Addresses, Phone Numbers and Email addresses is a way to copy addresses and phone numbers into each client's information without re-entry.

Navigation for Associating Physical Address:

- 1.) Expand the **Client** node.
- 2.) Select **Address/Phone/Email/State Detail** folder.
- 3.) Right-click and select **Add New Address or Add Existing Address**.
- 4.) Create **New Physical Address** or search for **Existing Address** and **Select**.
- 5.) **Save**.
- 6.) Expand the **Physical location** node.
- 7.) Right-click on the **Associations** folder and select **Add Existing Client** (or Collateral).
- 8.) From the **Search** screen, select a Client to associate to the same address.
- 9.) Hold the **CTRL** button down to select multiple clients at the same time.
- 10.) Click the **Select** button. Clients all display under the **Associations** folder.
- 11.) Change **Other/Unknown** to **Physical location** for each client.
- 12.) Enter the correct **Effective Date**.



Note:

- 1.) Use the same process for entering all the same phone numbers and email addresses.
- 2.) End physical locations before adding a new one. There can only be one current physical location for each client and collateral.
- 3.) Make sure to update all information when received.