MANAGING ALTERNATE ADDRESSES IN XOMS

When ordering product, there will be instances when your order will not be using your customer's default address information; the most common examples are:

- Events
- Blank goods to be decorated
- Customer purchasing for a client
- Drop/Split Shipments

XOMS is able to handle alternate addresses in a number of ways. We will explore the above examples and the best practices we recommend for them.

> ➢ **EVENTS**

EX: My customer is having the product ship to a hotel for a special event.

In this case you will need to edit the customer information on the PO and Customer Facing documents such as Quotes, Invoices, Acknowledgments etc.

To do this, you will change the Customer Shipping Information by going to the Customer info tab or pressing the Alt button.

Click on   + Add Alternate Address

You can then enter in the address for where the product is shipping, or choose from an existing customer if applicable. You can also update the Tax info here.

> ➤ **BLANK GOODS TO BE DECORATED**

EX: Ordering blank shirts from SANMAR that will be decorated

You will need to alter the address that shows on the Purchase Order to the supplier

Create a purchase order document. Go to Main Tab, and click on PREPARE VENDOR PO

From this screen click on

You will be able to the search for the vendor from the vendor list using Copy from Vendor Once the address is selected press the SAVE button

NOTE THIS IS IMPORTANT FOR USING THE <u>BLANK GOODS RECEIVING LIST</u>

The vendor purchase order for will be created. Notice the SHIP BLIND TO THIS ADDRESS shows the vendor address selected on the previous steps. Once satisfied with the information contained on the purchase order, save it and submit to the vendor for processing.

> ➢ **CUSTOMER PURCHASING FOR A CLIENT**

Ex: My customer is having product purchased for them by a different client they work with

In this case you will need to use a different billing customer code. Billing addresses are created when you create a Shipping Customer Code. You will always have to create the Shipping first in order to use a Billing Address. From there, you could use one Customer Shipping Code, with another Billing Customer Code.

Under customer Info, you will now see how the information will show on Customer Facing Documents

➢ **DROP/SPLIT SHIPMENTS**
   EX: Product will be shipped to multiple addresses

We recommend handling this one of two ways:

ADDITIONAL INSTRUCTIONS METHOD:
If you have 5 or less addresses, you can break out the addresses and quantities being shipped in the Additional Instructions

Create Purchase Order document and click on Add/Change Alternate Address. You will inform the supplier to read the notes below

Manually change the Carrier to Drop Shipment or Split Shipment and enter in the addresses in the Additional Information Section, if you need some more room you can use the option to Add on a Separate Page

*WE RECOMMEND 5 OR LESS BECAUSE THE MORE INFORMATION YOU ADD TO THIS SECTION THE SMALLER THE FONT BECOMES TO FIT ON THE PAGE**

The Supplier can now see how this will be shipped. However, we still recommend contacting the vendor to confirm if you are not confident.

> ATTACH SPREADSHEET METHOD

If you have more than 5 addresses, it is best to attach a spreadsheet with the breakdown. This will help to make sure the information is communicated properly.

Create Purchase Order document and click on Add/Change Alternate Address. You will inform the supplier to read the notes below

Manually change the Carrier to Drop Shipment or Split Shipment and enter **PLEASE SEE ATTACHED SPREADSHEET WITH BREAKDOWN OF QUANTITIES AND LOCATIONS** to further confirm supplier needs to see spreadsheet.

You can attach the spreadsheet on the email page

If you come across any other examples that do not fit into these examples, please feel free to contact Affiliate Services for further assistance.