Name Location Types

Document #:	3387	Product:	CenterPoint®

CenterPoint allows you to maintain multiple address and contact information for all the names on your Names list. Name Location types are used to categorize addresses assigned to customers, vendors, etc. For example, shipping, billing, residence, etc. CenterPoint includes three name location types; Billing, Shipping and Home.

Name location types are used on Names >Names > Addresses tab and multiple addresses can use the same name location type category. For example, the name location type = Billing can be assigned to the regular Billing address and the alternate Billing Address.

Create a Name Location Type

Change a Name Location Type

Combine Two Existing Name Location Types

Delete a Name Location Type

Create a Location Type

New Name Location Types can be added if you'd like to track locations that CenterPoint doesn't already have included. For example if you have customers that move south in the winter, you could setup a name location type called "Winter Address" so you could categorize those addresses.

1. Select **Setup** > **Names Name Location Types**.
2. Click **New**. If the new location type is similar to an existing type, select the similar item and click **Copy** instead of New.
3. In the **Abbreviation** box, enter up to ten characters of optional information that you can easily identify the name location type by. For example, B for Billing or S for Shipping.
4. In the **Name** box, enter up to 30 characters of required information that describes the name location type.
5. Under **Address Type**, select the types of address this name location type is, Billing, Home, or Shipping. If you do not select an address type, the name location type will be categorized as an Other address type.
6. Click **Save** to save the name location type and return to the List tab, or click Close to save the location type and close the Name Location Types screen.

Note: To return to the List tab without saving the name location type, click Cancel. To close the Name Location Types screen without saving the name location type, click in the upper-right corner of the screen.

Change a Name Location Type

The Edit button allows you to change any of the original information assigned to a Name Location Type.

1. On the **Setup** menu, point to **Names**, and then click **Name Location Types**.
2. Select the name location type you want to change, and then click **Edit**.

Note: If you change the information in the Name box, past location type information is automatically linked to the new Name. For example, if you change location type Billing to Billing Addresses, your reports will no longer show name location type Billing and any existing information for location type Billing is now part of name location type Billing Addresses.

3. The **General** tab appears. Edit or view the name location type detail. To edit another name location type, click or to display the previous/next name location type.
4. Click **Save** to save the name location type and return to the List tab, or click Close to save the name location type and close the Name Location Types screen.

Combine Two Existing Name Location Types

The Combine button allows information from one master file record to be merged together with another master file record. The original master file record will no longer appear on the List tab. All information will be available in the master file record the original was merged with.

Note: Prior to performing a combine, Red Wing Software suggests performing a backup of your database.

1. On the **Setup** menu, point to **Names**, and then click **Name Location Types**.
2. Select the name location type you want to combine.

Note: You cannot combine multiple master file records at one time. You can combine only one record with one other record at one time. The record in the Combine Information From box will be combined into the record you select from the list under With and will be removed from the database.

3. Click **Combine**.
4. On the Combine screen, select the name location type you want to combine your selection with.
5. Click **OK**.
6. At the "**Are you sure you want to combine you selected in Step 2) into the (item you selected in Step 4)?**" message, click **Yes**.

Note: The name location type you selected in Step 2 will be removed and will no longer appear on the List tab. The combined information will be stored in the name location type you selected in Step 4.

Delete a Location Type

The delete button removes existing master file records. You cannot delete a record that is linked to other records in the system.

1. On the **Setup** menu, point to **Names**, and then click **Name Location Types**.
2. Select the name location type(s) you want to delete, and then click **Delete**.
3. At the "**Are you sure you want the item deleted?**" message, click **Yes**.