

Working with Postal Codes

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When you implement aACE, you must decide what U.S. postal codes you need and [what source to obtain them from](#). From Menu > System Admin > Postal Codes, you can easily [import the data](#).

The screenshot shows a web application window titled "Postal Codes" with a search bar and a table of data. The table has columns for Postal Code, City, County, State, Country, Country Code, Postal Format, Tax Profile, Sales Rep, Account Manager, and Territory. The first row is highlighted in yellow.

Postal Code	City	County	State	Country	Country Code	Postal Format	Tax Profile	Sales Rep	Account Manager	Territory
10001	New York	New York	NY	US	> American					
10002	New York	New York	NY	US	> American					
10003	New York	New York	NY	US	> American					
10004	New York	New York	NY	US	> American					
10005	New York	New York	NY	US	> American					
10006	New York	New York	NY	US	> American					
10014	New York	New York	NY	US	> American					
10016	New York	New York	NY	US	> American					

You can edit postal codes one at a time or also update them in batches using the Actions menu (e.g. Update Postal Format for Postal Codes in List).

Eliminating Duplicate Codes

You may need to import other postal codes (e.g. Canadian locations). After you import the new postal codes, there may be some American postal codes that overlap with the new postal codes. If you will not be using the American locations, you can easily eliminate those duplicates:

1. From the Postal Codes module, locate all the duplicate values by searching the **Postal Code** field for "!".
2. Constrain that list to *only show* entries with "US" in the **Country Code** or with "American" in the **Postal Format**.
3. Click **Actions > Delete Postal Codes in List**.

Example of Editing Postal Codes

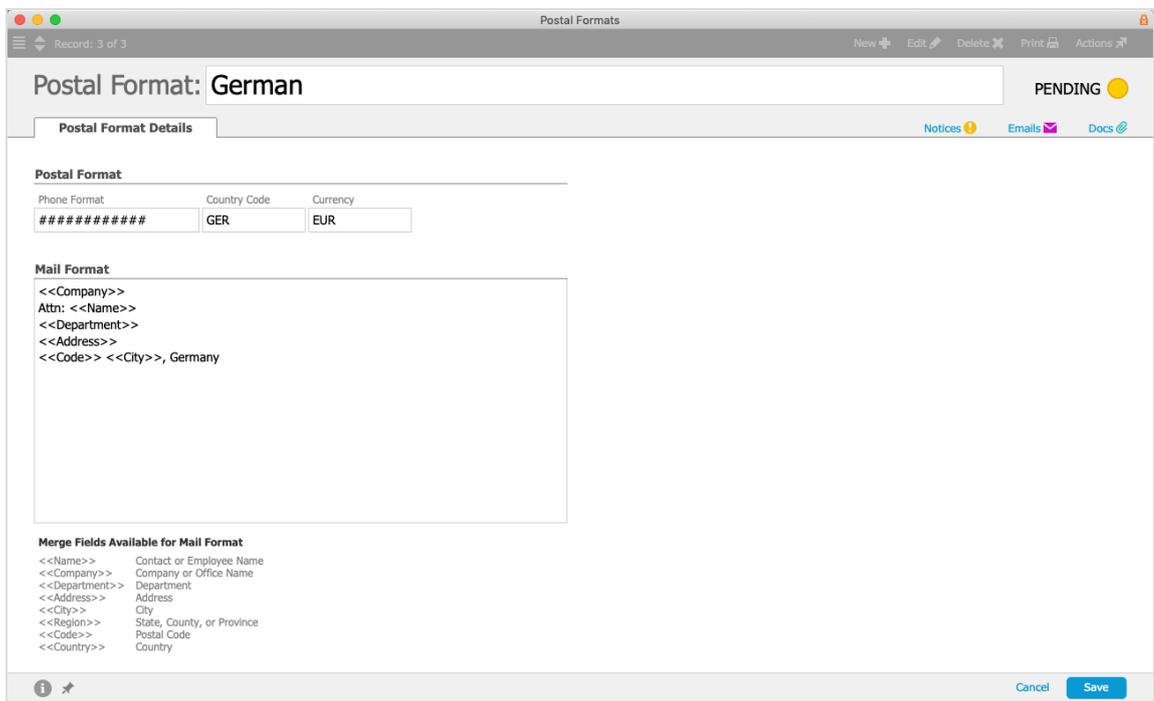
Updates to postal codes are usually only necessary for certain international sales. (Note: Postal codes can only be assigned a *single location*. Modifying a postal code as described in the following example will prevent the code from pulling in U.S. address data.)

Suppose you receive a sales order from a new customer in Hamburg, Germany. The postal

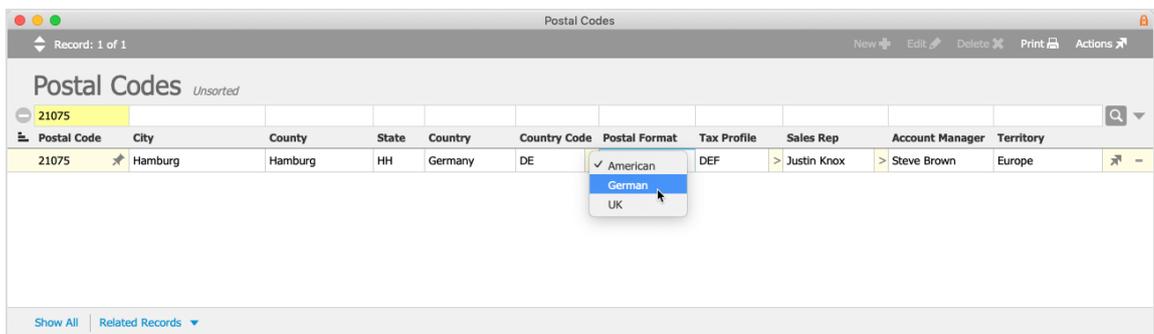
code for this new customer is "21075", which is also a valid postal code for Elkridge, Maryland. When your team creates the company record for this customer, entering the postal code also auto-populates the State field to "MD".

To resolve this issue, your system administrator must first create a new Postal Format for addresses outside the U.S., then update the postal code record.

The new Postal Format could be for Germany specifically or for Europe in general. From Menu > System Admin > Postal Formats, she can duplicate an existing format, then customize it for the new territory:



The postal code can then be switched to the new format. From Menu > System Admin > Postal Codes, she can locate the entry for "21075" and update the information, including the new Postal Format:



When your sales rep then updates the company record, the Postal Code will auto-

populate with the information for this foreign sales lead and the appropriate Postal Format can be selected:

The screenshot shows a web-based CRM interface for a company record. The window title is "Companies". At the top, there is a navigation bar with "Record: 1 of 1" and action buttons: "New", "Edit", "Delete", "Print", and "Actions". The main header displays "Company: Ausbildung International" and "50199" with a "PENDING" status indicator. Below this is a "Company Details" tab with sub-tabs for "Notices", "Emails", and "Docs".

The "Create Contacts" section contains a table with the following data:

Salut	First Name	MI	Last Name	Suffix	Initials	Title	Department	Email
Herr	Oskar		Muller		OM		Purchasing	omuller7@ausbildung.com

Below the table are fields for "Office Phone" (004915290189), "Ext", "Direct", "Mobile", "Home / Other", "Fax", and "Alt Email".

The "Company Info" section includes:

- Type: Lead
- Address: Theodorstraße 42-90, Haus 9
- City: Hamburg
- State / Prov: HH
- Postal Code: 21075
- Country: Germany
- Postal Format: German

The "Contact Info" section includes:

- Phone / Fax Format: #####
- Phone: 004915290182
- Fax: (empty)
- Alt Phone: (empty)
- Email: kontakt@ausbildung.com
- Web Address: ausbildung.com
- Email Format (using "John Q Public"): (empty)

The "Billing Address" section includes:

- Billing Salutation (Company Name): Ausbildung International
- Sync with Office:

The "Other Info" section includes:

- Group: (empty)
- Subgroup: (empty)

At the bottom right, there are "Cancel" and "Save" buttons.