

## Updating Address Records

This document covers the data entry steps required for updating a Constituent’s address, and how to share addresses between spouses. Address sharing between two Constituent records and address sharing between a Constituent and a ghost record are covered.

This process must only be conducted by Advancement Services staff or by those who have received specific Address record update training.

### Changing a Constituent’s Address

- Open the person or organization’s constituent record.
- Go to the Address tab.
- Double click on the preferred address.
- Click on “Address” (next to Help, see blue circle below) and select to “Copy Preferred Address to Alternate”. A window will pop up saying that it has been copied, click OK. (This will former the wrong address after you enter the new address and will show up as Alternate under the Indicator.)

Address Type	Indicator	Address	City/State	Preferred?	Linked?	Send Mail?
Former Home	Alternate	2015 26th Street Ct NW	Gig Harbor, WA	<input type="checkbox"/>	no	<input type="checkbox"/>
Home	Preferred	2015 26th Street Ct NW	Gig Harbor, WA	<input checked="" type="checkbox"/>	yes	<input checked="" type="checkbox"/>



- Type in the new address line over the old one. Type over the city and state and go down to the zip and put in the first 5 numbers.
- Click on the little white envelope on the icon line (see next page, blue circle). This is the **AddressAccelerator** validation that the post office uses to validate the address. An Address Validation window will open.
- Click the “Update Address” button. Validation will take several seconds and will automatically fill in the city, state, zip, county, lot numbers and other numbers that are valid for the post office, if validation is successful. If there is a problem with validation, please let Advancement Services know by emailing [BioUpdates@seattleu.edu](mailto:BioUpdates@seattleu.edu).

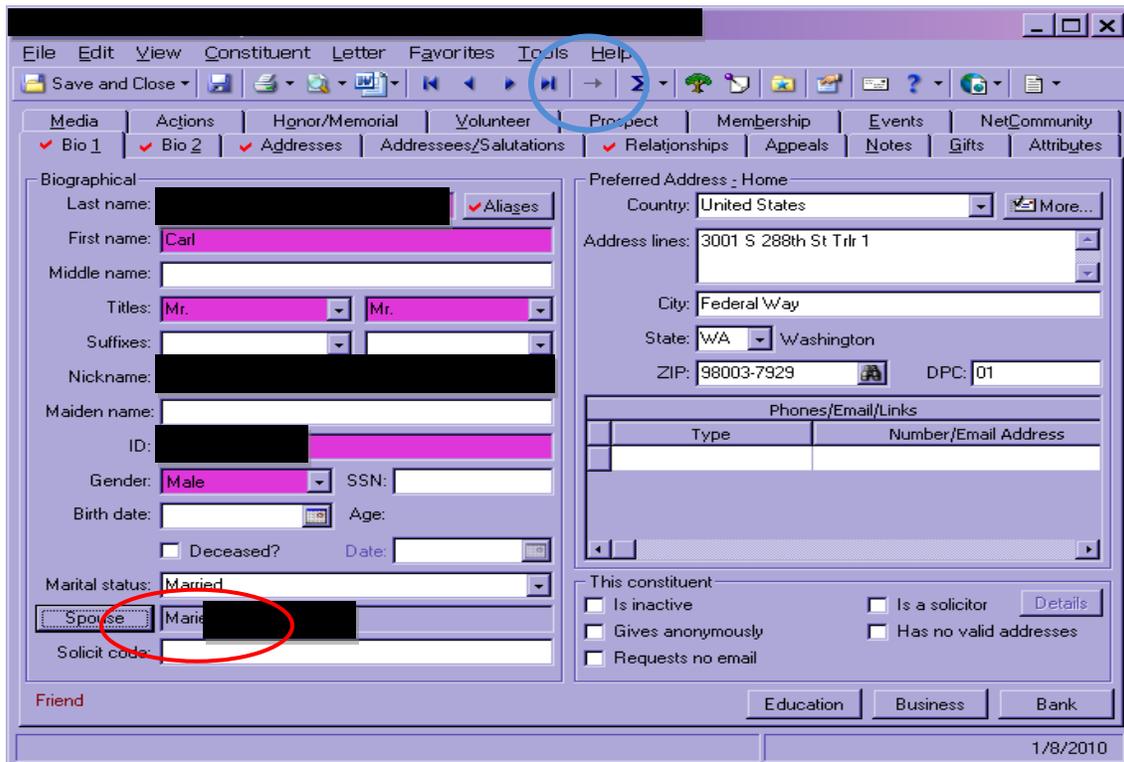
- Enter the method by which you became aware of the address changes in the Info Source box.
- Fill in a time zone for US addresses.
- Under the Valid Dates section, to go “Date from:” and press the F3 key to put in today’s date.
- Click on Save and Close. If a box pops up and asks you to “Change the address on this record only” or “Change this address on all records that share this address”, click on the “Change the address on this record only”:



- Make sure the older address (formerly the preferred) does not have the “Send mail to this address box” checked. If it does, double click on the wrong address, and uncheck the “Send mail to this address” and save your change.
- If there is a spouse associated with the person whose address you just changed, that spouse’s address will need to be reviewed as well

### Changing Addresses on a Constituent’s Spouse Record when the Spouse is a Ghost

- If there is a spouse, you will have to change their address also. If the spouse is a ghost (the lone blue arrow will be grayed out (blue circle below)), click on the spouse button on the Bio1 page and update the address on that Relationship record.



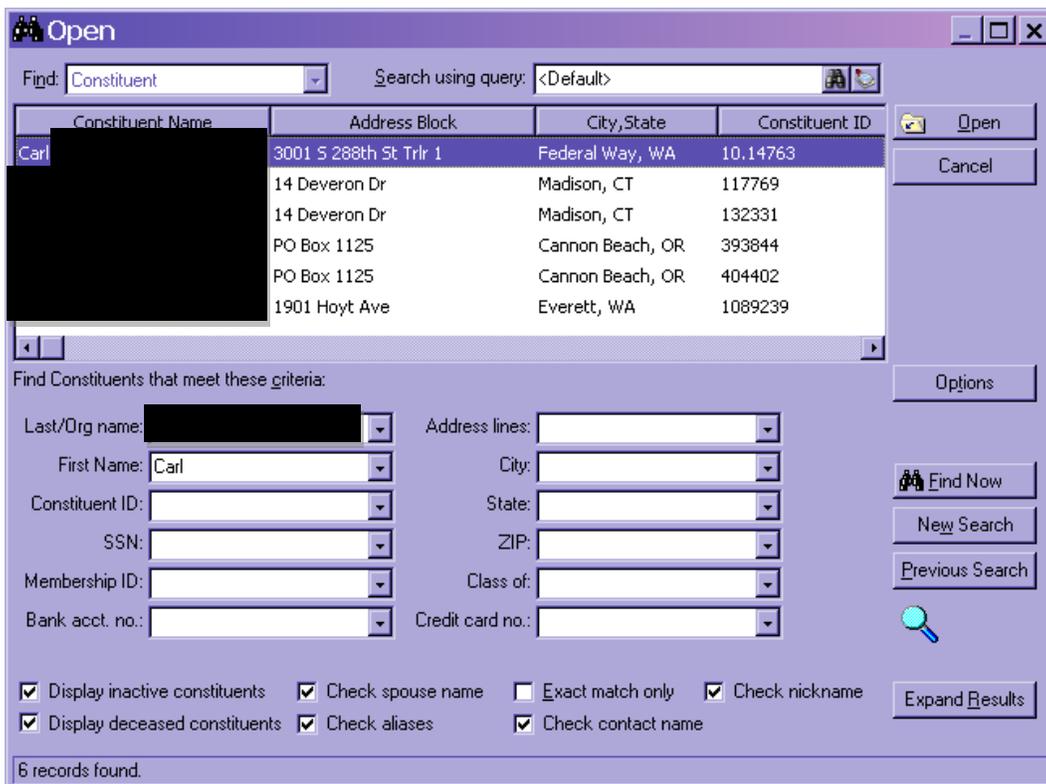
- Click on “Relationships” from the top menu bar and Select “Address Sharing Options”.

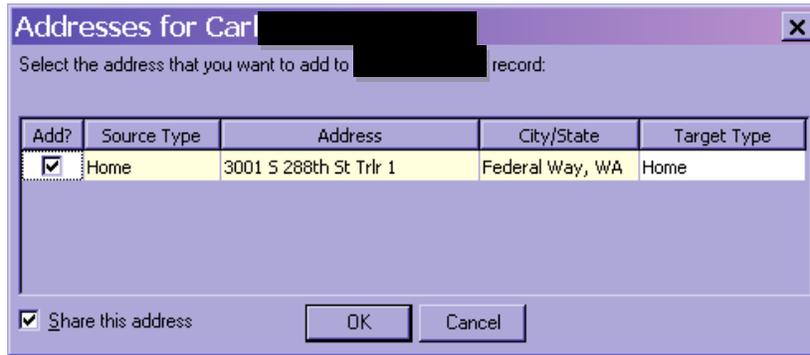


- Click on the Stop Sharing This Address box. This will stop sharing the old address so you can add the correct one.



- Click on Address again, Copy/share Address From Constituent, and type in the original spouse record name or number if you know it and click on the address that is correct. This will give you all the addresses that are in the spouse's record.





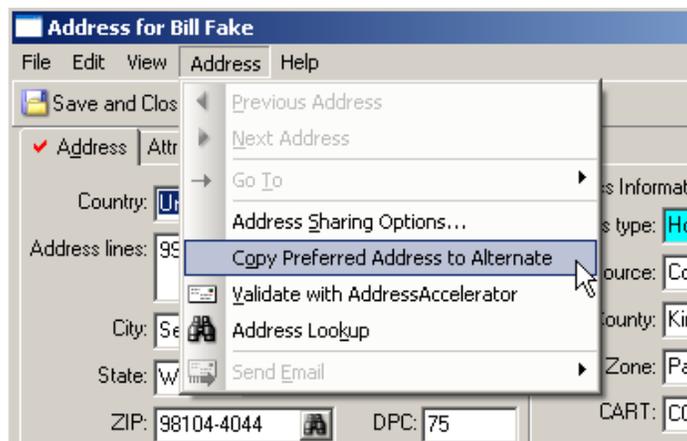
- Click on OK and it will update the spouse record with the new address. Click on Save and Close.

### Changing Addresses on a Constituent’s Spouse Record when the Spouse has his/her own Constituent record

- If the spouse has a record, you can get to their record by going to the Bio1 tab and click on the blue arrow (circled in blue below). This will take you to that spouse’s record.



- When the Spouse record opens, go to his/her Address tab and click on the outdated address.
- Click “Address” from the top menu bar and select “Copy Preferred Address to Alternate”. A window will pop up saying that it has been copied, press OK.





- Click on “Address” from the top menu bar again and select “Address Sharing Options”. If a box comes up that asks to stop sharing this address, you **do not** want to share the address with this person (old address), click on **Stop Sharing This Address**.
- Click on “Address” again and select “Copy/share Address From Constituent” and search for the spouse’s Constituent record. A window will open up displaying all the addresses for the selected Constituent record.
- Once found, check the appropriate address that should be shared and click “OK”

Add?	Source Type	Address	City/State	Target Type
<input checked="" type="checkbox"/>	Home	999 3rd Ave Ste 2300	Seattle, WA	Home

Share these addresses

OK Cancel

- Verify on the Address tab that the Spouse address is linked. The Linked column should read “Yes” for that address, it should be Preferred with the proper address type. Verify the old address was formered. It should read “Former” in the Address Type column.

### Business Addresses Considerations

There are additional considerations for adding business addresses. These include business addresses and Organization relationship addresses from the Individual’s Constituent record, and Individual relationship addresses from an Organization’s Constituent record. We must determine if an address should be mailed to:

- Yes if given a specific address at an organization representing that person’s exact business address. For example, “999 3<sup>rd</sup> Ave STE 2300” qualifies as an address we would use to send mail to a specific employee.
- No if given a generic corporate address with no mailstop, room or floor number. For example, “One Microsoft Way” does not qualify as an address we would use to send mail to a specific employee.



### Indicating a Business Address Should Receive Mail

On the Address Record:

- The “Send mail to this address” box checked.
- The Valid Date From is blank or before today’s date.
- The Valid Date To is blank or after today’s date.

### Indicating a Business Contact Should Receive Mail at a Business Address

In addition to the field values required for marking a Business Address as receiving mail, verify following data entry on the Relationship Record:

- The “Do not mail to this contact” box is unchecked
- The Relationship Date From and To suggest the relationship is current. Note that the Relationship and Reciprocal field values have no effect on address processing.