

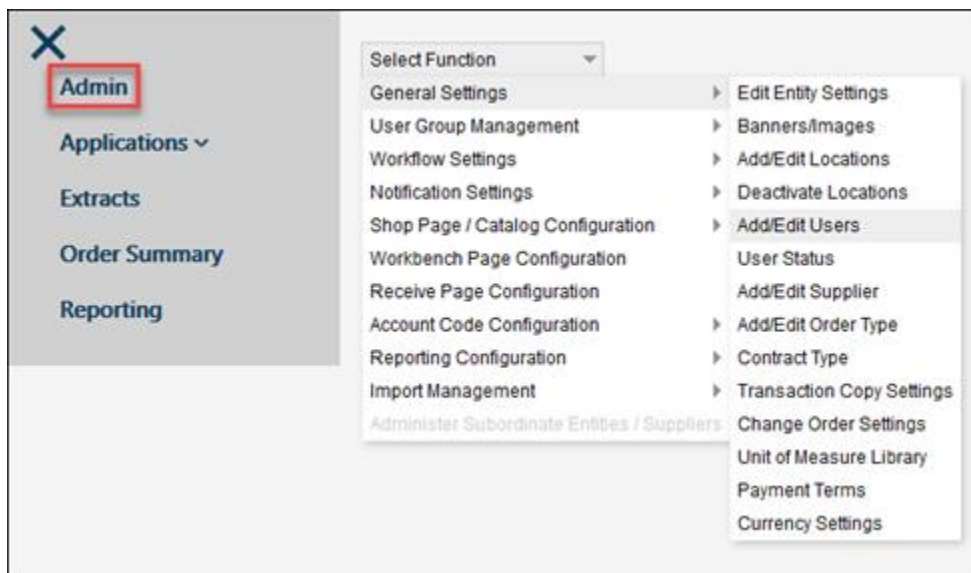
Private Addresses

Overview

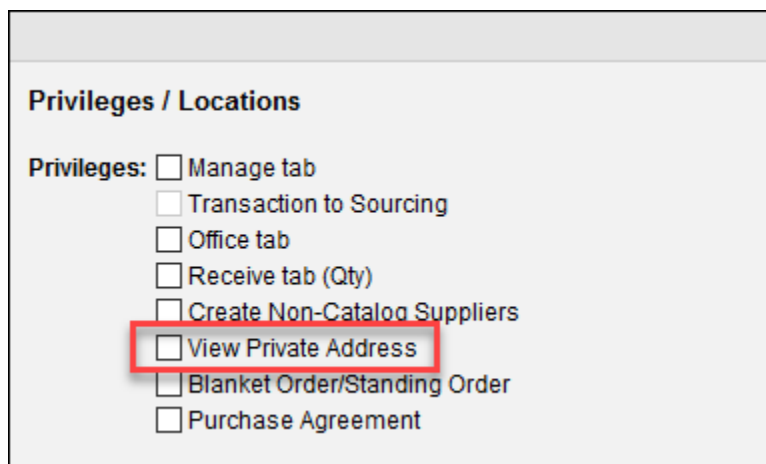
ESM Purchase allows for adding Ship-To Locations and masking them as private addresses within the application. This is useful if System Administrators want to restrict the visibility of a location address within Purchase for such examples as residential or home address shipments for remote operation.

Functionality

Administrators, by default, are assigned the permission to View Private Addresses. All other users will have to be assigned this permission to be able to see private address locations. Administrators can assign this permission under the **Admin Menu > General Settings > Add/Edit Users**.



On the Users Profile > Check the box to enable View Private Address

A screenshot of a 'Privileges / Locations' section in a user profile. It contains a list of checkboxes for various permissions. The 'View Private Address' checkbox is highlighted with a red box. The other permissions listed are: 'Manage tab', 'Transaction to Sourcing', 'Office tab', 'Receive tab (Qty)', 'Create Non-Catalog Suppliers', 'Blanket Order/Standing Order', and 'Purchase Agreement'.

Click Update.

By default, Administrators will have the View Private Address enabled

▼ESM Purchase

Menu / Cart / Checkout

Menu Options: Order Summary
 Order Summary Edit
 Reporting
 Admin

Privileges: Transfer Originator's Cart
 Edit Cart Transferred To
 Checkout tab
 View SSN

Privileges / Locations

Privileges: Manage tab
 Transaction to Sourcing
 Office tab
 Receive tab (Qty)
 Create Non-Catalog Suppliers
 View Private Address
 Blanket Order/Standing Order
 Purchase Agreement

Marking a Location as a Private Address

Administrators can set a Location as a Private Address. To update the location type, go to the **Admin Menu > General Settings > Add/Edit Locations**.

X

Admin

Applications ▾

Extracts

Order Summary

Reporting

Select Function ▾

General Settings ▶ Edit Entity Settings

User Group Management ▶ Banners/Images

Workflow Settings ▶ Add/Edit Locations

Notification Settings ▶ Deactivate Locations

Shop Page / Catalog Configuration ▶ Add/Edit Users

Workbench Page Configuration ▶ User Status

Receive Page Configuration ▶ Add/Edit Supplier

Account Code Configuration ▶ Add/Edit Order Type

Reporting Configuration ▶ Contract Type

Import Management ▶ Transaction Copy Settings

Administer Subordinate Entities / Suppliers

Change Order Settings

Unit of Measure Library

Payment Terms

Currency Settings

* Location Name: ESM Solutions ⓘ

Location ID (GL): ⓘ

* Address Line 1: 1501 North Main St

Address Line 2:

* City: Warrington

* State: Pennsylvania ⓘ Or

* Province: Not required if State

* Zip/Postal Code: 18976

* Country: United States ▾

* Phone: 2154449300

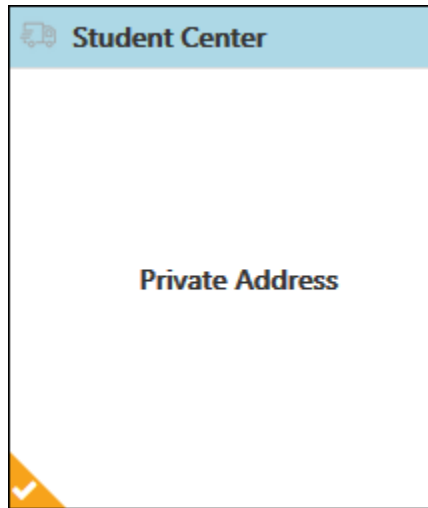
* Location Type: Ship to
 Bill to
 ESM Billing Address

* Bill to Attn: ESM Solutions

Private Address: ⓘ

Select the Private Address checkbox and click Update.

When an address is marked as private, only those with permission to **View Private Addresses** will see the location details on a Transaction. All other users will see only the name of the location, as shown below:



Importing Locations

When importing locations, the import template designates a field for marking an address as Private. This field defaults to the value of **No**. If a location needs to be marked as a Private Address, this field should be marked **Yes**. The mass update will hide address details to those not assigned the View Private Address privilege for any addresses created or updated.

○
Private Address
Char = 3
Optional. Defaults to No. Set to Yes if address details should only be visible to users with the view private address permission.

Best Practices

ESM recommends the following steps to ensure easy maintenance of Private Addresses.

- Defining and following a naming convention is highly recommended for reporting and ensures data consistency. For example, "Private – [Name]", will help identify private addresses within your organization quickly through standard reporting and data management.
- Private addresses can be added and/or disabled through the standard admin screens. However, if mass data loads are needed, it is recommended to use the Location import template to create or deactivate private addresses without repetitive manual effort.
- If using the Reporter within Purchase, the Private Address flag is available to use in reports for maintenance and monitoring the use of Private Addresses.
- If not using the Reporter, a System Administrator can use the Entity Profile Extract to identify private addresses if the recommended naming convention approach is used.