

Tech Tip Tuesday—October 29, 2013

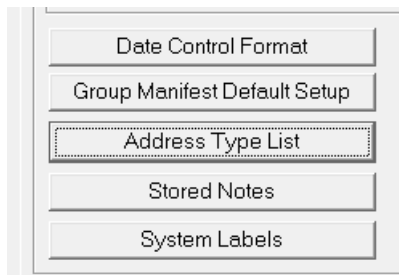
by David Hirsch

We're all busy at the Cavalcade of Limo Shows in Atlantic City this week and next week, and we know that many of you are also. So this week and next week we'll have some quick tips...and if you're at either the LCT East show or will be coming to the Chauffeur Driven show, please come by and say hello!

Cleaning up your address types

One of the elements of the contact record is the address label—basically, what kind of address have you entered? Not long ago, we moved this Address Type field from above the address to below the address in order to reduce confusion, but still we come across lots of examples of all sorts of odd text in this field...such as street addresses, or 15 different ways to describe “Office”.

If you want to bring order to the chaos, it's fairly simple. Not only can you clean up the old labels in a somewhat orderly fashion, you can also restrict your users so that they can't just enter whatever what they want in that field, but must pick from the list.



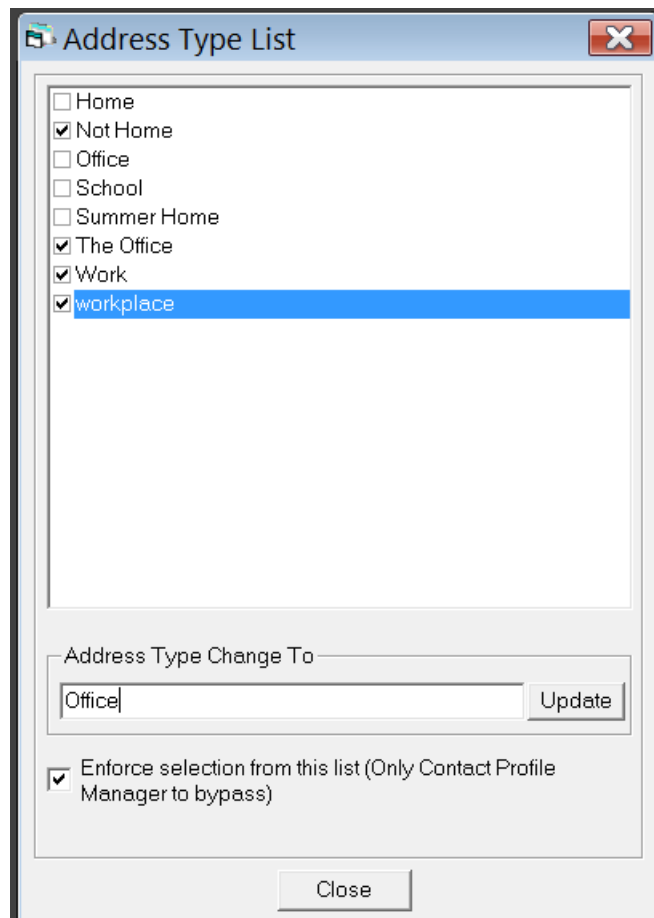
To clean up your labels and restrict their use, just launch Maintenance, and go to Maintain...System Default Config...Misc...and then click on Address Type List. Then, click on all the labels you want to rename, and type in the replacement name at the bottom, and click Update. (Note that you can select multiple labels and change them all to a single label—but a warning: this can not be undone.)

Once you have cleaned up the mess, now you might want to keep it that way.

To do that, first make sure that the bottom box that says “Enforce selection from this list” is checked.

Then, to keep people from typing in what they want, go to Maintain...Security... and for each user, make sure that “Contact Profile Maintenance” is unchecked. (Note that this will inhibit the user from making other profile changes as well, such as the First and Last Name, Company, and other information in the profile.)

Contact Profile Maintenance



Once you are done, should a user without permission to add a label try to do so, he or she will get the following message:

