

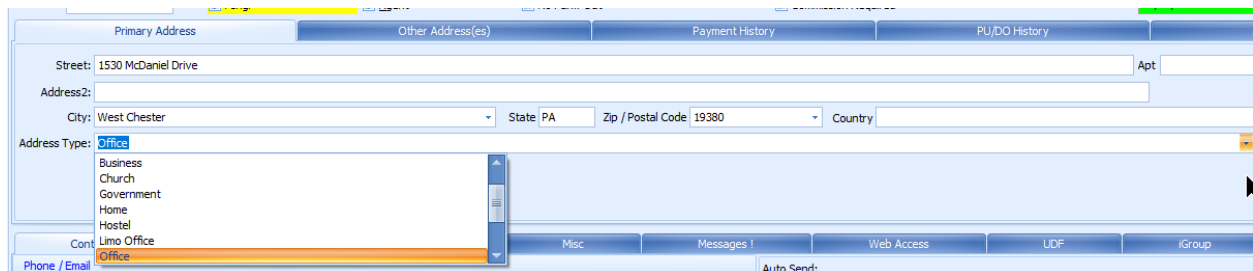
Tech Tip Tuesday—April 20, 2021

While we will continue to produce Tech Tips with both new features and some tips we haven't covered before, we are also going to be covering some features and topics that have previously been covered in a Tech Tip—but not recently. Many of you have joined the Livery Coach family since our Tech Tip series started (in 2013), and even those of you who have been with us “forever” probably don't remember everything—indeed, even we don't remember everything all the time.

Today's subject was last covered in 2013.

Cleaning up your address types, and preventing the mess

One of the elements of the contact record is the address label—basically, what kind of address have you entered? This is an optional text field in the contact record that, depending on settings, can be limited to a drop-down box with purposefully limited choices.



The screenshot shows a contact record form with several tabs: Primary Address, Other Address(es), Payment History, and PU/DO History. The Primary Address tab is active. The form contains the following fields:

- Street: 1530 McDaniel Drive
- Address2: (empty)
- City: West Chester
- State: PA
- Zip / Postal Code: 19380
- Country: (empty)
- Address Type: A dropdown menu is open, showing a list of options: Business, Church, Government, Home, Hostel, Limo Office, and Office. The 'Office' option is currently selected.
- Phone / Email: (empty)

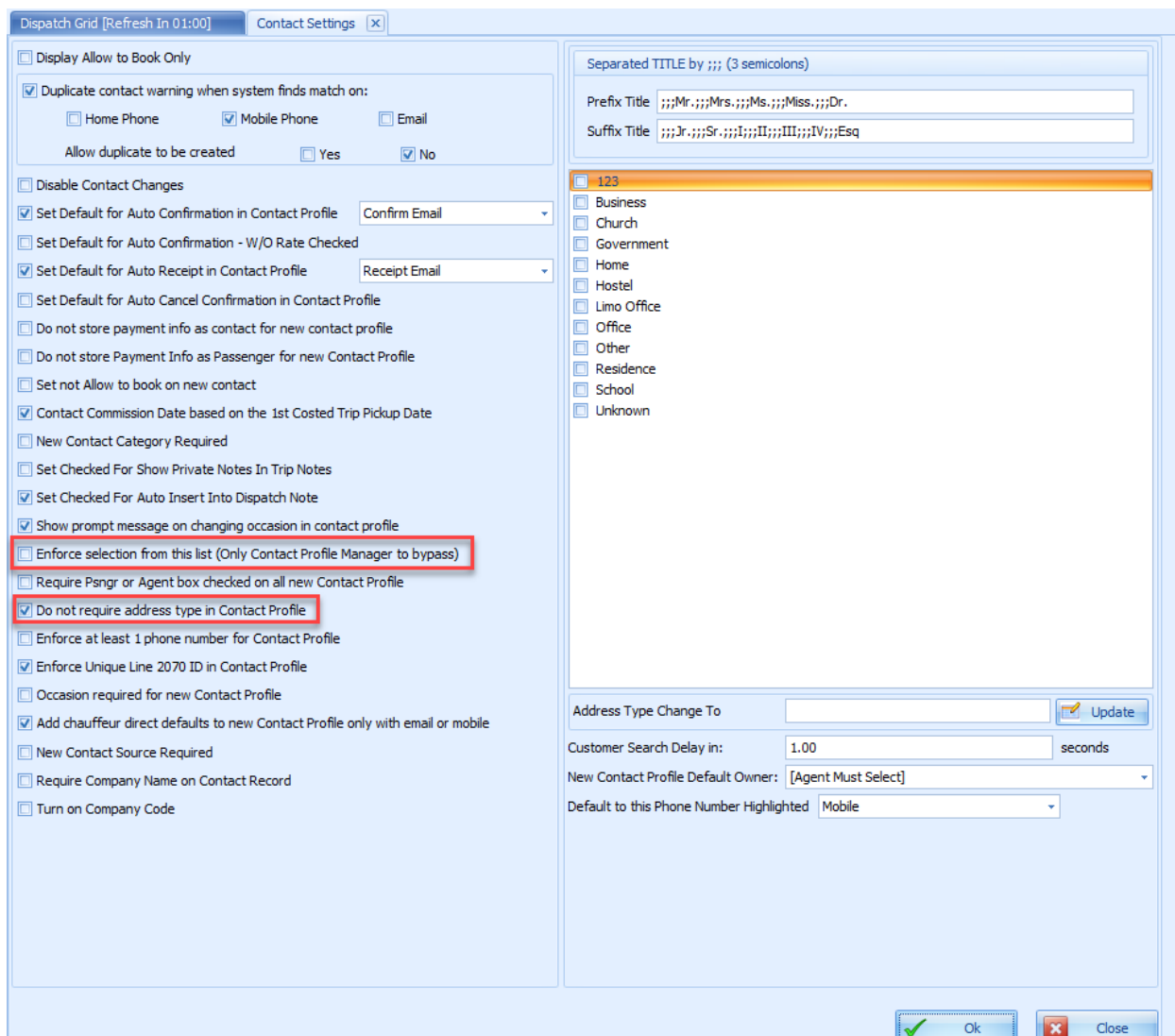
At the bottom of the form, there are several tabs: Misc, Messages, Web Access, UDF, and iGroup. An 'Auto Send:' field is also visible.

If you haven't limited this field to the drop-down, and especially if your system requires this field rather than making it optional, you might have a mess of different data here, such as people's last names, 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. And, separately, you can make this a non-required field.

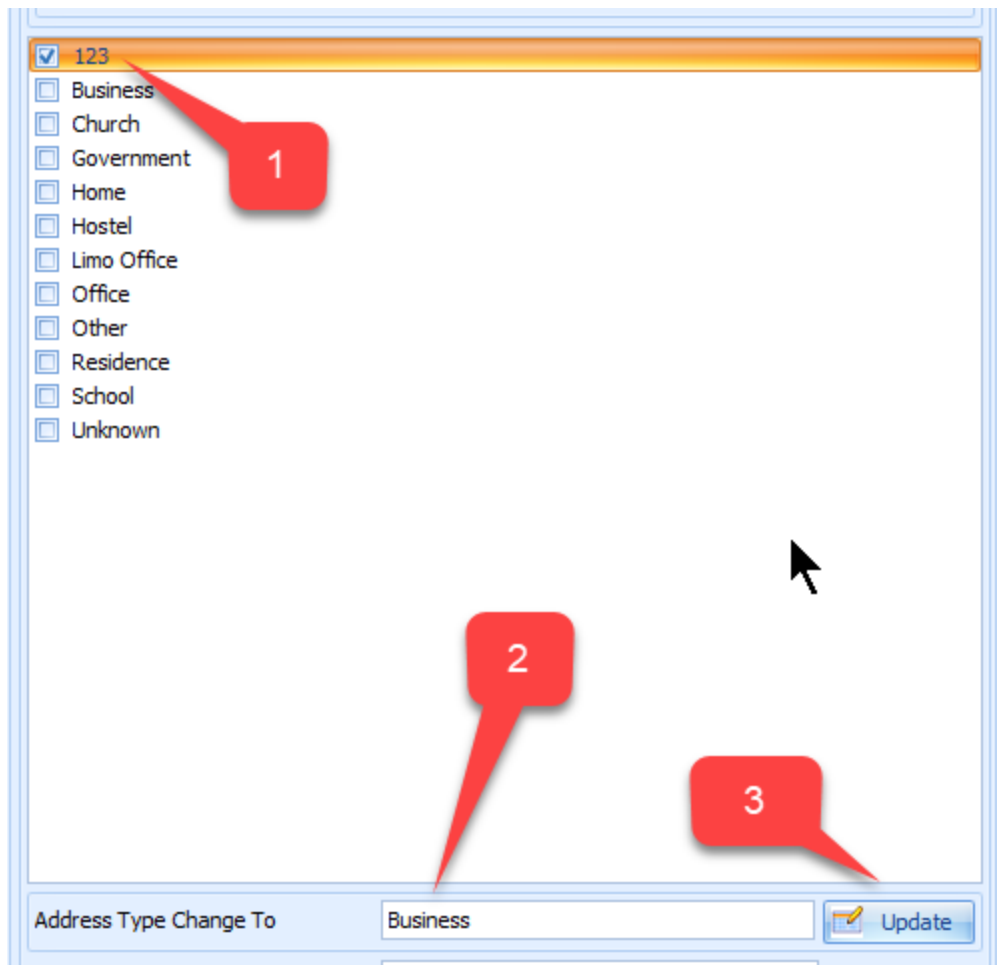
Navigate to Setup->Maintain->System Default Config->Contact Settings.

In the large window on the right, you will see all the address labels you have used in at least one contact. On the left (highlighted below in red boxes) are the settings to require selection from the list, and also to make the selection optional (rather than required).



If you want to change a label (or labels) to something else, simply click on all the labels you want to rename, 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.)

In the screen shot below, we will change “123” to “Business”.



Now if your agent tries to put something not on the dropdown in that field (and doesn't have "Contact Profile Maintenance" permission in Security), the following message will appear:

