

DYNAMICS 365 FINANCE AND OPERATIONS

ADDRESS AND CONTACT SETUP

LogTrade
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1. General

This document describes how you define addresses and contact information differently based on different carriers, customers etc.

1.1. Sales address contact information

On the address card for the customer, it is possible to add contact information used for the delivery address in LogTrade. If the fields are empty the settings below will be used. But if the contact fields are filled that information will override the settings below.

The fields you can use for contact information on the address are:

- Delivery Contact
- Delivery E-mail
- Delivery Phone
- Delivery SMS

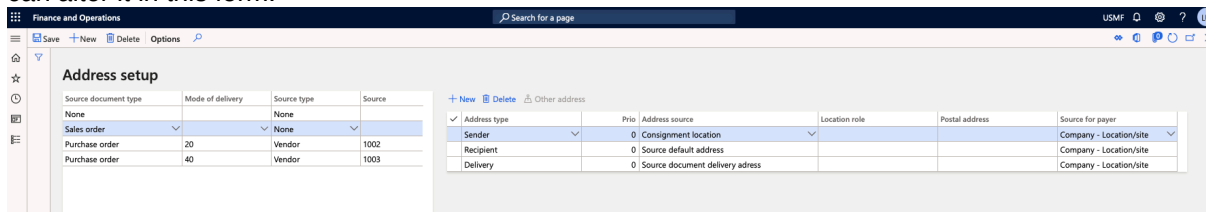
These fields also exists on the sales order and this information will fill in the fields on the order but can off course be changed on the sales order.

1.2. Address setup

Address setup for the delivery address (or recipient if no delivery address exists) will only be used if contact information described above in chapter 1.1 is not used.

In Address setup, and Address contact setup (LogTrade Connect->Setup->Advanced) you can define how addresses and contact information is populated on a consignment.

During the setup wizard a default setup is done for the address (not for Contacts), but if needed you can alter it in this form.



The default setup defines that Sender address should be populated from the warehouse (and if no address is found, from Company), and the Receiver address should be populated from the source document (for example Sales Order). If no source document is available (for example a consignment created based on a customer only), the second address line stipulates that the address should be fetched from the Source instead.

On each line you can also define how the paying account number (GAN) is found.

This is mostly used if you need to define a specific setup for return orders, where the address setup and customer number can be different based on which carrier that is used.

The address setup can be defined on many different criteria.

1.3. Contact setup

The contact information that you want to populate on the different addresses can be managed from the Address Contact setup.

Source type	Source	Source document type	Mode of delivery	Address type	Field name	Prio	Description	Property value
Customer	US-017	Sales order	Parce-STD	Recipient	PhoneNumber	0	Employee	
Customer		Sales order		Recipient	Email	1	SalesTable	Email
Customer		Sales order		Recipient	PhoneNumber	1	SalesTable	customerPhone()
Customer		Sales order		Delivery	PhoneNumber	1	SalesTable	LTCPhone
Customer		Sales order	DHLSwePall	Sender	Email	0	Set value	leveransavi@aaa.se
Customer		Sales order		Delivery	PhoneNumber	0	SalesTable	
Customer	SE-001	Sales order		Delivery	ContactPerson	0	SalesTable	ShipCarrierDeliveryContact
Customer	SE-001	Sales order		Delivery	PhoneNumber	0	Set value	070-1234567
Customer	SE-001	Sales order		Delivery	SmsNumber	0	SalesTable	LTCPhone

Here you can use value functions to define from where to get values for the contact data.

The Prio field allows you to look for data in a specific field, and if empty try another field.

Predefined functions exist that get data from sales orders, Contacts on sales orders, workers (mapped to current sign-in-user) etc.

Here you can also define many different criteria, so that a specific line only applies to a specific case. To create a line in this form, you need to create a new line, define the criteria, and then save the line.

Then you can specify how the value should be defined. You can use functions here, where one default function is "Set value". It basically allows you to type in a specific value.

Name ↑	Label
customerMobilePhone()	customerMobilePhone()
customerPhone()	customerPhone()
CustomerRef	Customer reference
DeliveryName	Delivery name
Email	Email
LTCPhone	Telephone
PurchOrderFormNum	Customer requisition