Party and global address book

Party and global address book are concepts in Finance and Operations applications. A Party can be an organization or a person. It's convenient to globally store and manage properties of a **Party**, like name, language, contacts, and addresses. When a property value changes at one place, it reflects in all places where the **Party** is involved.

Party

A *Party* is a person or an organization involved in the business. By using the Party concept, a person or an organization can play more than one role (worker, customer, vendor, or contact) in a business. The role is based on the context and purpose. Here are some examples from two fictitious companies, Contoso and Fabrikam.
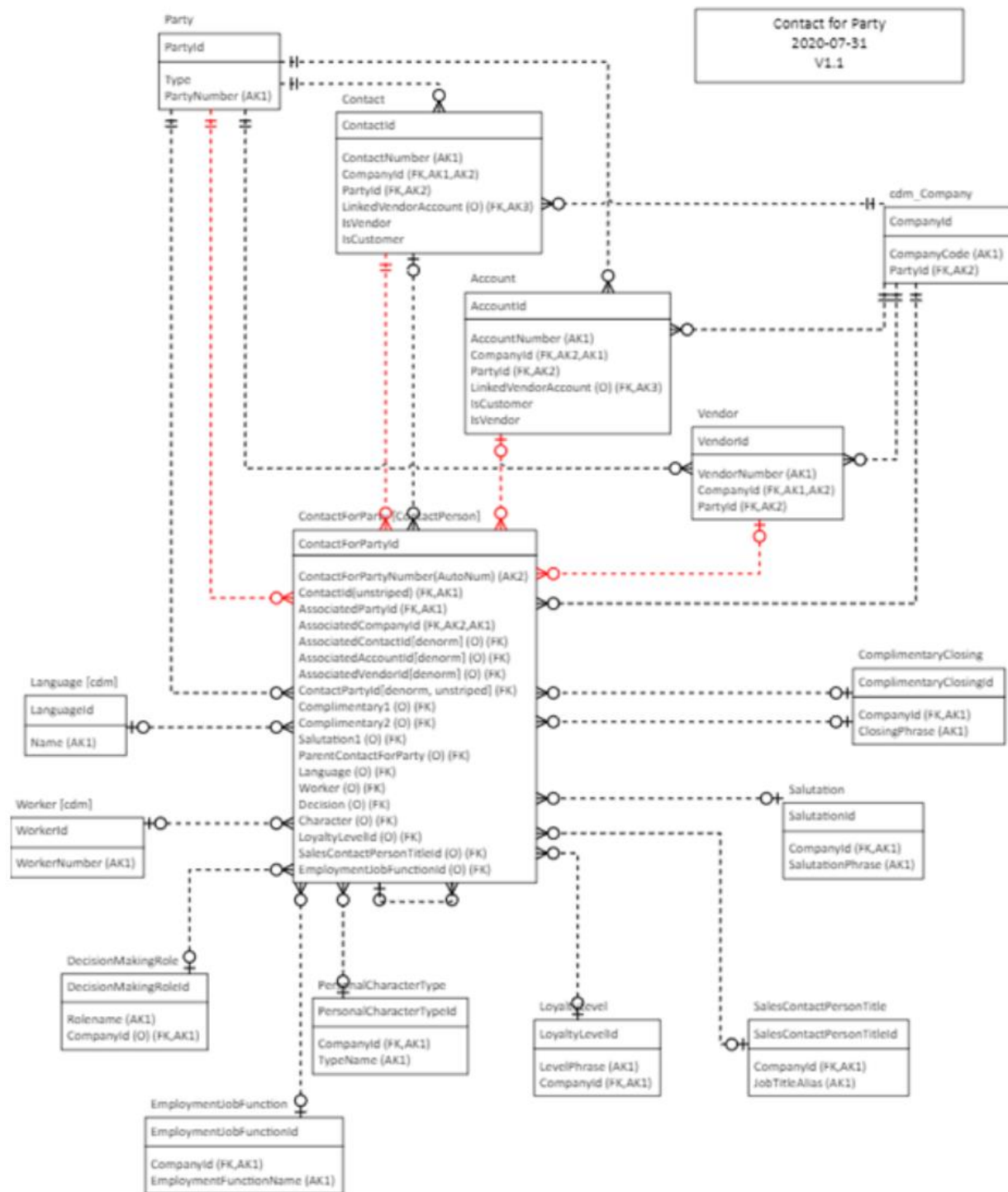
- **Worker**: An employee. For example, an employee of Contoso.
- **Vendor**: A supplier organization, or a sole proprietor who supplies goods or services to a business. For example, if Fabrikam sells supplies to Contoso, then Fabrikam is in the role of vendor.
- **Contact**: A person to contact. For example, if Contoso buys supplies from Fabrikam, an employee at Contoso would reach out to the contact at Fabrikam.
- **Customer**: A customer is a person or company that buys things from a company. For example, if Contoso buys supplies from Fabrikam, then Contoso is a customer of Fabrikam.

The Party model is often used to represent medium to complex relationships between organizations and people, particularly when a party plays more than one role. Here are some common examples:

- A party can be both a customer and a vendor. For example, in North America, Fabrikam sells electric wires to Contoso and purchases assembled speakers from Contoso. In Europe, Fabrikam sells parts to Contoso, but doesn't by anything from Contoso.
- A party can be both an employee and a customer. For example, an employee of Contoso buys electronics from Contoso for personal use.
- There can be a many-to-many relationship between a person and an organization. For example, Fabrikam supplies service specialists and employs a placement coordinator. The coordinator matches the service specialists for the work requests from several of Fabrikam's customers.

Contoso is one of the customer accounts. When Contoso needs a specialist, Contoso contacts the coordinator, who then facilitates the request. The coordinator handles requests for all customers, creating a many-to-many relationship.

The following image shows the data model for Party:

Party

PartyId

Type
PartyNumber (AK1)

Contact for Party
2020-07-31
V1.1

Contact

ContactId

ContactNumber (AK1)
CompanyId (FK,AK1,AK2)
PartyId (FK,AK2)
LinkedVendorAccount (O) (FK,AK3)
IsVendor
IsCustomer

cdm_Company

CompanyId

CompanyCode (AK1)
PartyId (FK,AK2)

Account

AccountId

AccountNumber (AK1)
CompanyId (FK,AK2,AK1)
PartyId (FK,AK2)
LinkedVendorAccount (O) (FK,AK3)
IsCustomer
IsVendor

Vendor

VendorId

VendorNumber (AK1)
CompanyId (FK,AK1,AK2)
PartyId (FK,AK2)

ContactForParty [ContactPerson]

ContactForPartyId

ContactForPartyNumber(AutoNum) (AK2)
ContactId(unstriped) (FK,AK1)
AssociatedPartyId (FK,AK1)
AssociatedCompanyId (FK,AK2,AK1)
AssociatedContactId[denorm] (O) (FK)
AssociatedAccountId[denorm] (O) (FK)
AssociatedVendorId[denorm] (O) (FK)
ContactPartyId[denorm, unstriped] (FK)
Complimentary1 (O) (FK)
Complimentary2 (O) (FK)
Salutation1 (O) (FK)
ParentContactForParty (O) (FK)
Language (O) (FK)
Worker (O) (FK)
Decision (O) (FK)
Character (O) (FK)
LoyaltyLevelId (O) (FK)
SalesContactPersonTitleId (O) (FK)
EmploymentJobFunctionId (O) (FK)

ComplimentaryClosing

ComplimentaryClosingId

CompanyId (FK,AK1)
ClosingPhrase (AK1)

Language [cdm]

LanguageId

Name (AK1)

Worker [cdm]

WorkerId

WorkerNumber (AK1)

Salutation

SalutationId

CompanyId (FK,AK1)
SalutationPhrase (AK1)

DecisionMakingRole

DecisionMakingRoleId

Rolename (AK1)
CompanyId (O) (FK,AK1)

PersonalCharacterType

PersonalCharacterTypeId

CompanyId (FK,AK1)
TypeName (AK1)

LoyaltyLevel

LoyaltyLevelId

LevelPhrase (AK1)
CompanyId (FK,AK1)

SalesContactPersonTitle

SalesContactPersonTitleId

CompanyId (FK,AK1)
JobTitleAlias (AK1)

EmploymentJobFunction

EmploymentJobFunctionId

CompanyId (FK,AK1)
EmploymentFunctionName (AK1)

Red relationship lines show denormalizations.
ContactForParty entity uses display name "Contact for Customer/Vendor."

Tip

When you are trying to create a new account record, use the "Party" field to search for the record by name. In case you find the record, you just need to select the record. The system auto fills all the data from the party. You don't need to manually enter all the required fields. This behavior can be found on Account, Contact and Vendor forms shipped out-of-the-box.

Not all party roles of Finance and Operations apps are supported by dual-write. For a complete list of party roles, see [Global address book overview](#).

Global address book

The global address book is a directory of postal and electronic addresses of the organizations and individuals participating in a business.

The global address book stores and handles as many postal addresses and electronic addresses as needed. For example, suppose that Fabrikam has gas stations in 50 locations. Each location has a different postal address, email, and phone number. All business purchases are billed to the main gas station, but purchases are shipped directly to the specific gas station that requested the purchase. The global address book stores the main gas station as the billing address and each gas station as a shipping address for Fabrikam. The addresses can be stored once and retrieved as needed for quotations and orders.

A person or an organization can play more than one role based on the business context. When they do so, their postal addresses and electronic addresses might be the same. In this case, a change of address in one role should appear on the other role and vice versa. The global address book stores and handles addresses globally.
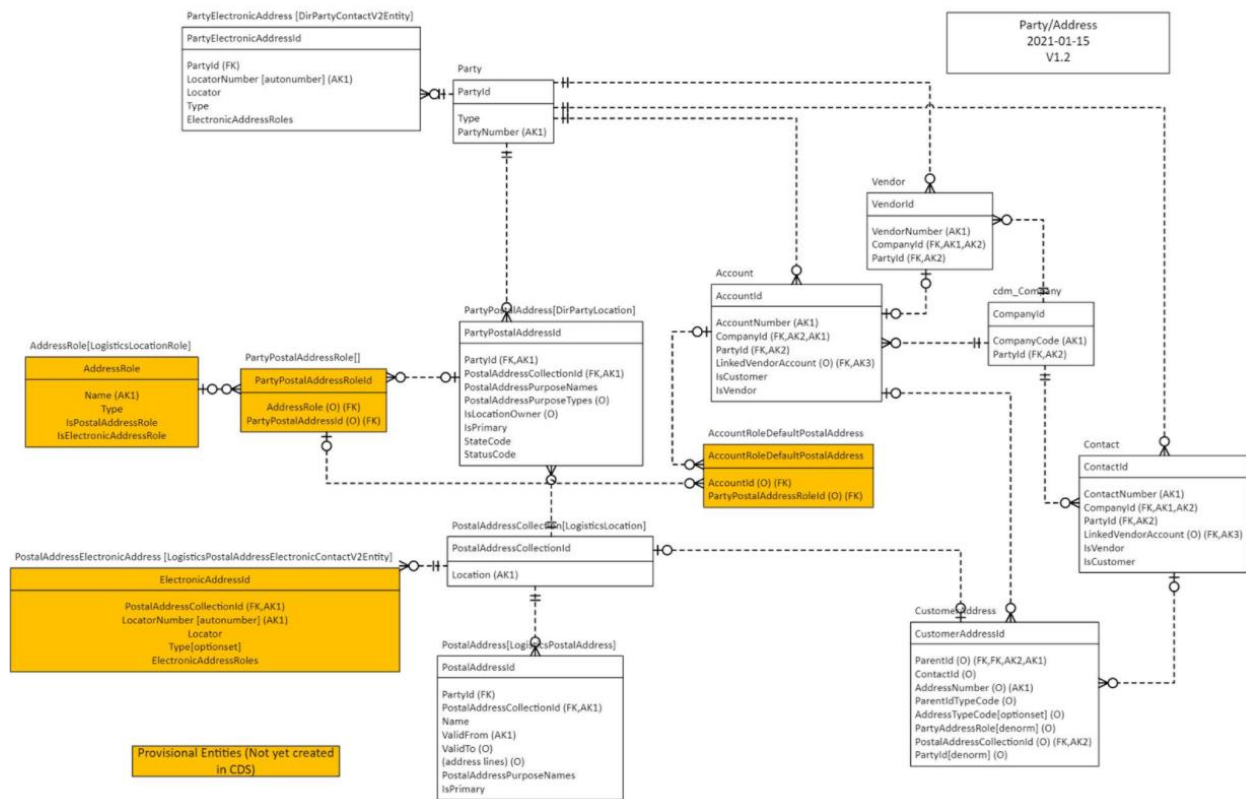
Contacts

In customer engagement apps, a *Contact* is a person. However, the **Contact** table has been overloaded to represent a person, a portal user, a B2C customer, or a vendor. The representation is implicit and you cannot tell the difference without looking into related transactions. The **Contact** table has been limited to have a 1:1 relationship with the **Account** table. As part of Party and global address book model, dual-write introduces explicit properties for classification and dual-write allows N:N relationships between a **Contact** person and an organization (Account entity or Vendor entity).

There are two types of **Contact** rows:

- Striped contact – Contact row with a mandatory value in the **Company** field.
- Unstriped contact – Contact row with blank **Company** field blank.

The **Contact** table can store these types of rows:

Row type	Description
A person who is a customer, for example a sellable contact or B2C customer.	A striped contact record where the **Company** field is not blank and the **Is Customer** field is set to **Yes**.
A person who is a vendor, for example, a sole proprietor like vendor.	A striped contact record where the **Company** field is not blank and the **Is Vendor** field is set to **Yes**.
A person who is both a customer and a vendor.	A striped contact record where the **Company** field is not blank, the **Is Customer** field is set to **Yes**, and the **Is Vendor** field is set to **Yes**. A person can be both a producer for one product and a consumer for another product. Both Finance and Operations apps and dual-write support this relationship.
A person who is a contact person for an organization, but is not a customer nor a vendor.	An unstriped contact record where the **Company** field is blank, the **Is Customer** field is set to **No**, and **Is Vendor** field is set to **No**.

Contact for Party

Contact for Party stores and handles N:N relationships between **Account** rows and **Contact** rows. It can filter out the striped **Contact** rows from unstriped rows and associate only the unstriped **Contact** rows to an **Account** or **Vendor** rows.

For example, Natasha Jones and Miguel Reyes are veterinarians who provide care for farms in their areas. Natasha serves the Seattle area and Miguel serves the Kent area. In the customer engagement app, the farms are represented as customers and the veterinarians are contact persons. A single **Contact** record for Natasha is associated with all the farms that Natasha works with. Similarly, a single **Contact** record for Miguel is associated with all the farms that Miguel works with.

These relationships are stored in the **Contact for Party** table. You can find the information in the out-of-the-box forms:

- When you are in the **Account** form, there is a tab named **Associated Contacts**. Use this tab to associate one or more contacts to the **Account** row. On this form, you are assigning a contact person for an organization. After you assign contacts, you can choose one as the primary contact for that account. Using the **Quick Create** form, you can only choose

a contact person. The behavior is the same when you are using the **Vendor** form and the record type is **Organization**.

- When you are in the **Contact** form, and the row is a customer or vendor or both (a striped contact), there is a tab named **Associated Contacts**. Use this tab to associate one or more contacts. On this form, you are assigning a contact person for the B2C customer or vendor. After you assign contacts, you can choose one as the primary contact. Using the **Quick Create** form, you can only choose a contact person.
- When you are in the **Contact** form, and the row is a contact person (an unstriped contact), there is a tab named **Associated Organizations**. Use this tab to associate one or more customers or vendors. On this form, you are assigning a customer or vendor to the underlying contact person. The customer or vendor can be an organization, a person, or both. You can choose only one value from the four fields at a given time.

- o If you choose **Party ID**, then the underlying contact is assigned to all the roles of the chosen party.
- o If you choose **Associated Contact**, then you are selecting the striped contact that is of type person.
- o If you choose **Associated Account** or **Vendor**, then you are selecting an organization.

Regardless of your choice, the association is created at the party level and applicable to all the roles of the party and stored in "Contact for Party" entity.

 Note

The display name for the **Contact for Party** table in the customer engagement app is **Contact for Customer/Vendor**.

When you open a **Contact** row where **Is Customer** is **No** and **Is Vendor** is **No**, you will see the **Associated Organizations** tab. Use this tab to associate one or more customer or vendor organizations to the contact.

When you open a **Contact** row where **Is Customer** is **Yes** or **Is Vendor** is **Yes**, you will see the **Associated Contacts** tab. Use this tab to associate one or more contacts.

Postal address

A new tab named **Addresses** has been introduced on the **Account**, **Contact**, and **Vendor** forms. The **Addresses** for supports N addresses by using a grid, as shown in this image:

- The **Postal Address Roles** column lists the purpose of the address.
- The **Is Primary** column lists the primary address.
- The **Address Number** column lists the address order.
- The **+ New Address** button lets you create a new address. You can create as many addresses as you want.

The **Address 1** and **Address 2** fields on the **Summary** tab of the **Account** form correspond to the **Delivery** and **Invoice** addresses, respectively.

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Account · Account ∨

Summary (Preview)　Details　Accounting　Scheduling　Associated Contacts (F

ADDRESS

Address 1: Street 1	Street1
Address 1: Street 2	Street 2
Address 1: Street 3	Street 3
Address 1: City	Bellevue
Address 1: State/Province	WA
Address 1: ZIP/Postal Code	98006
Address 1: Country/Region	USA
Address 2: Street 1	Street1
Address 2: Street 2	Street2
Address 2: Street 3	Street3
Address 2: City	Redmond
Address 2: State/Province	WA
Address 2: ZIP/Postal Code	98052
Address 2: Country/Region	USA

The **Address 1**, **Address 2**, and **Address 3** fields on the **Summary** tab of
the **Contact** form, correspond to the **Business**, **Delivery** and **Invoice** addresses,
respectively.

Electronic address

A new tab named **Electronic Addresses** has been introduced on the **Account**, **Contact**, and **Vendor** forms. The **Addresses** for supports N addresses by using a grid, as shown in this image:

- The **Type** column lists the type of the address.
- The **Is Primary** column lists the primary address.
- The **Purpose** column lists the purpose of the electronic address.
- The **+ New Electronic Address** lets you create a new address. You can create as many addresses as you want.

Electronic addresses are available only on this grid. In future releases, all electronic and postal address fields will be removed from other tabs, for example the **Summary** and **Details** tabs.

Setup instructions

If you are an existing dual-write customer, then the following setup instructions are required. Otherwise you can skip this section.

1. Stop the following maps, because they aren't required anymore. Instead, run the Contacts V2 (msdyn_contactforparties) map.
   - CDS Contacts V2 and Contacts (refers to customer contacts)
   - CDS Contacts V2 and Contacts (refers to vendor contacts)
2. The following entity mappings are updated for party functionality, so the latest version must be applied to these mappings.

SETUP INSTRUCTIONS

Map	Update to this version	Changes
Customers V3 (accounts)	1.0.0.5	Removed the PartyNumber and other party-related fields like name, personal details, postal

Map	Update to this version	Changes
		address fields, electronic contact address fields etc.
Customer V3 (contacts)	1.0.0.5	Removed the PartyNumber and other party-related fields like name, personal details, postal address fields, electronic contact address fields etc.
Vendors V2 (msdyn_vendors)	1.0.0.6	Removed the PartyNumber and other party-related fields like name, personal details, postal address fields, electronic contact address fields etc.
CDS Sales quotation headers (quotes)	1.0.0.6	Replaced the contact person with ContactforParty reference.
Sales invoice headers V2 (invoices)	1.0.0.4	Replaced the contact person with ContactforParty reference.
CDS Sales order headers (salesorders)	1.0.0.5	Replaced the contact person with ContactforParty reference.
Contacts V2 (msdyn_contactforparties)	1.0.0.2	This is a new map. If you have a previous version of the party solution, make sure to update this map to the latest version as mentioned.
CDS Party postal address locations (msdyn_partypostaladdresses)	1.0.0.1	This is a new map added as part of previous party preview release.
CDS postal address history V2 (msdyn_postaladdresses)		This is a new map added as part of previous party preview release.
CDS postal address locations (msdyn_postaladdresscollections)		This is a new map added as part of previous party preview release.
Party Contacts V3 (msdyn_partyelectronicaddresses)		This is a new map added as part of this release.

Templates

A collection of table maps work together for party and global address book interaction, as shown in the following table.

TEMPLATES		
Finance and Operations app	**Customer engagement app**	**Description**
Contact person titles	msdyn_salescontactpersontitles	

TEMPLATES

Finance and Operations app	Customer engagement app	Description
Customers V3	accounts	
Customers V3	contacts	
CDS Parties	msdyn_parties	
CDS Party postal address locations	msdyn_partypostaladdresses	
CDS postal address history V2	msdyn_postaladdresses	
CDS postal address locations	msdyn_postaladdresscollections	
CDS sales quotation header	quotes	
CDS sales order headers	salesorders	
Complimentary closings	msdyn_complimentaryclosings	
Contacts V2	msdyn_contactforparties	
Decision making roles	msdyn_decisionmakingroles	
Employment job functions	msdyn_employmentjobfunctions	
Loyalty levels	msdyn_loyaltylevels	
Party contacts V3	msdyn_partyelectronicaddresses	
Personal character types	msdyn_personalcharactertypes	
Sales invoice headers V2	invoices	
Salutations	msdyn_salutations	
Vendors V2	msdyn_vendors	

For more information, see Dual-write mapping reference.