



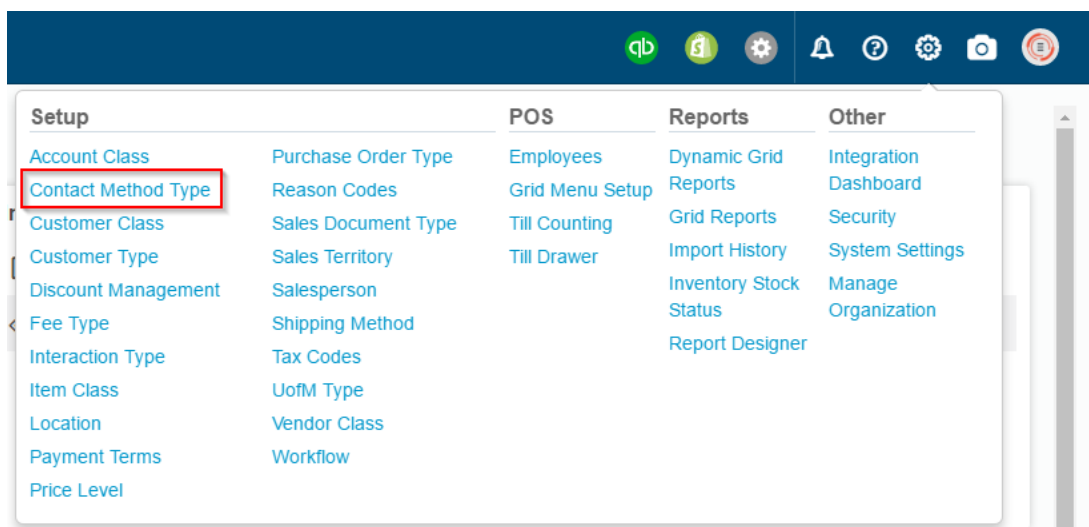
Contact Method Type

Megan De Freitas - 2024-12-02 - Settings

Overview

Interacting well with customers, vendors, sales reps, and others is a crucial part of running a successful business. SalesPad Cloud makes managing communications with your various contacts easy and efficient with Contact Method Types.

To get started, select **Contact Method Type** from the Settings menu.



Navigation Menu

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Contact Method Type

Create a Contact Method Type

To create a Contact Method Type, click the **New Contact Method Type** button in the upper left-hand corner of the screen.

Contact Method Type

New Contact Method Type

Contact Method Type

The Contact Method Type drawer will appear. Fill out the information fields in this drawer.

Contact Method Type Feedback ×

Contact Method Type

Email

Contact Method Kind

Email × ▼

Abbreviation

E:

Seq

Is Primary

For a brief explanation of the different information fields in the Contact Method Type drawer, click here:

Contact Method Type

Contact Method Type - Allows you to give the Contact Method Type a unique name

Contact Method Kind - Specifies which style of Contact Method this is (email, phone, etc.)

Abbreviation - Allows you to establish an abbreviation for the Contact Method Type

SEQ - Determines where on your Contact Method Type list this method falls

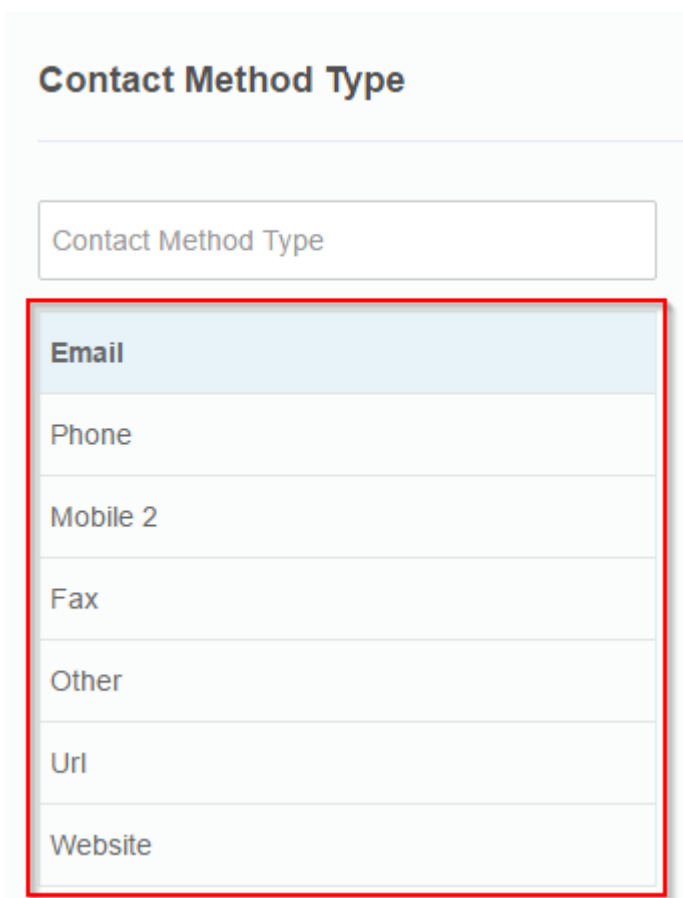
Is Primary - If this box is checked, this Contact Method Type is the primary method of communication with this customer

When you've finished entering your information, click **Save**.

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Edit a Contact Method Type

To edit an existing Contact Method Type, first select the Contact Method Type from the list on the left-hand side of the Contact Method Type window.

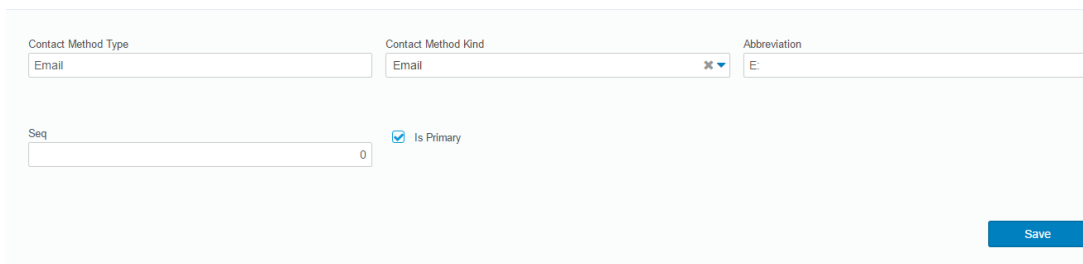


Contact Method Type

Contact Method Type

- Email
- Phone
- Mobile 2
- Fax
- Other
- Url
- Website

Once you've selected the Contact Method Type you want to edit, make your changes in the information fields on the right-hand side of the screen.



Contact Method Type: Email

Contact Method Kind: Email

Abbreviation: E:

Seq: 0

Is Primary

Save

When you've finished making your changes, click **Save**.

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See it in Action

Contact Method Type dropdowns appear on the Contacts tabs on [Customer](#) and [Vendor](#) cards.

Address Information ▼

Address 1

Address 2

Address 3

Address 4


Address 5

City

Phone

Mobile

Other

Phone 

Url

Set Inactive

Save

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