



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.



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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.



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



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.



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.



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.



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