

Knowledgebase > Settings > Contact Method Type

# Contact Method Type

Megan De Freitas - 2025-06-10 - 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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Setup		POS	Reports	Other	
Account Class Contact Method Type Customer Class Customer Type Discount Management Fee Type Interaction Type Item Class Location Payment Terms Price Level	Purchase Order Type Reason Codes Sales Document Type Sales Territory Salesperson Shipping Method Tax Codes UofM Type Vendor Class Workflow	Employees Grid Menu Setup Till Counting Till Drawer	Dynamic Grid Reports Grid Reports Import History Inventory Stock Status Report Designer	Integration Dashboard Security System Settings Manage Organization	

### **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.

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# **Contact Method Type**

Contact Method Type	
Email	
Contact Method Kind	
Email	X 🔻
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**.

### 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	S Primary	
		Save

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

### 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	
Email	
Fax	
Mobile	
Other	
Phone 🤚	
Url	•
	▲
Set Inactive	Save

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