

Knowledgebase > SalesPad > Sales > Contact Type Field on Customer Card

## Contact Type Field on Customer Card

Megan De Freitas - 2024-11-22 - Sales

## Overview

The Contact Type field on the customer card can be directly linked to a user defined field on the GP customer card. This allows the user to label what type of contact a specific address is for and will also add that field to the chosen field on the customer card in GP.

## Instructions

To enable the Contact Type field, go to Settings > Customer Inquiry. Change the *Contact Type Field for a Customer Address* to the specific user defined field you have created within GP. This field defaults to Not\_Used, so it will be grayed out by default on the customer card. Specifying a user defined field will enable the Contact Type field.

Ξ	Customer Inquiry			
	Auto Popup Customer Note	False		
	Contact Type Field for a Customer Address	USERDEF2		
	Contact Type Field for a Vendor Address	Not_Used		
	Customer Default Warehouse Enabled	False		
	Remember Doc IDs	True		
	Warn When Updating A Customer Addr	False		

Next, set the Contact Types to choose from in the *Contact Type List* (under *Customer Contact Options –* ex: Customer;Biller;Shipper):

	Customer Contact Options				
	Accts Payable Contact Type				
	Contact Type List	Customer;Biller;Shipper			
	Phone 1 Label	Phone 1:			
	Phone 2 Label	Phone 2:			
	Phone 3 Label				

Save the settings.

Open any customer in your database and find the Contact Addresses tab.

If an address exists for the customer, click on the Address Code for that specific address. This will open the Customer Contact Card, where you can edit the Contact Type under Contact Information:

🖾 🗟 Sales Documents 🖾 🗋 (ORDER) ORDST2373 🖾 Contact: BILLING/Roberta Masouras							
Customer Name:	Adam Park I	Resort					
	P P P F F	Contact Information Contact Type: Hone 1: Hone 2: Hone3LayoutControlItem Tax:	Customer Customer Biller Shipper	Other A Wareho e e e e e e e e e e			
IN y: USA	V	Veb Site:		Do No			

Once you save the changes, the specific user defined field on the Customer Maintenance card in GP will be changed to the contact type set for that address:

🙀 Customer Maintena	nce							X
File Edit Tools Additional Help					sa Fabrik	am, Inc. 4/	12/2017	
🛃 Save <u> </u> Clea	ar 🗙 <u>D</u> elete 🗰	Write	e Letters 🖕					- <b>3</b>
Customer ID	ADAMPARK0001	Q 🗈	🗌 Hold 📃 Inact	ive	Parent Customer I	D		
Name Adam Park Resort				_				
Short Name	Adam Park Resor				<u>Class ID</u>	USA-INMI-	·T2	Q
Statement Name	Adam Park Resort				Priority	None	•	
Address ID	PRIMARY	Q i						
Contact	Roberta Masouras Suite 9876				Phone 1	(317) 555-0	0102 Ext. 00	00
Address				Phone 2		(000) 000-0	0000 Ext. 00	00
	321 Chestnut Drive				Phone 3	(000) 000-0	0000 Ext. 00	00
					Fax (000) 000-000		0000 Ext. 00	00
City	Indianapolis							
State IN					UPS Zone			
ZIP Code	46206-1391				Shipping Method	GROU	IND	$\sim$
Country Code				_	Tax Schedule ID USASTCITY-6*			
Country US				[	Ship Complete	Document	s	
Ship To	PRIMARY	Q	Comment 1					
Bill To	BILLING	Q	Comment 2					
Statement To	PRIMARY Q		Trade Discount			0.00	)%	
Salesperson ID	GREG E.	Q	Payment Terms		NET 30	6		ounts
Territory ID	TERRITORY 2	Q	Discount Grace Pe	riod				ress
Туре	Retail		Due Date Grace P	eriod				<u>1</u> 033
User-Defined 2	Customer		Price Level		RETAIL	6	्र <u>0</u> pt	ions
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