



CRM Contact

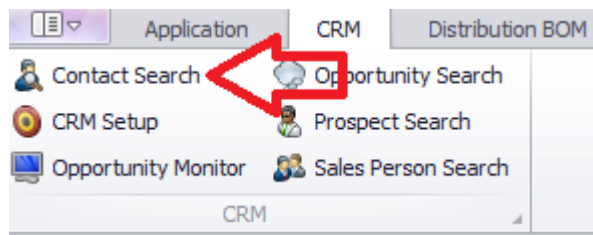
Megan De Freitas - 2024-11-22 - CRM

Overview

CRM Contact Search can be used to search and view contact cards and their properties in SalesPad. The contact search will search contact, prospect, opportunity, and vendor contacts as well.

Using CRM Contact

1. Make sure all of your Security is enabled and you have the latest version of SalesPad installed.
2. Click on the CRM ribbon
3. Click Contact Search.



The following tab will open:

A screenshot of the CRM Contact Search search form. The form has a title bar with 'Customer Search', 'CRM Setup', and 'Contact Search' tabs. Below the title bar, there are search criteria fields: 'Company', 'City', 'Contact', 'State', 'Phone', 'Zip', 'Sales Rep', and 'Contact Type'. There are also search options: 'Starts With' (checked) and 'Show Inactive' (unchecked). Below the search criteria, there is a table for search results with columns: 'Number', 'Name', 'Type', 'Address', 'City', 'State', 'Zip', 'Phone', 'Sales Person ID', 'Contact Person', and 'Address Code'.

4. Enter data in any of the following fields to populate results:
 - Company
 - City
 - Contact
 - State
 - Phone
 - Zip
 - Sales Rep
 - Contact Type

Example

Entering part of the phrase or some of the phrase will populate search results. In this example, Aaron Fitz has been entered to bring up the information.

1. Enter Aaron Fitz

Customer Search | CRM Setup | Contact Search

Close | Search

Search By

Company: Aaron Fitz

City:

Search Results

2. View Results:

Search Results		
Number	Name	Type
<u>AARONFIT0001</u>	Aaron Fitz Electrical	Customer
	Aaron Fitz Electrical	Customer
	Aaron Fitz Electrical	Customer
	Aaron Fitz Electrical	Customer
	Aaron Fitz Electrical	Customer
	Aaron Fitz Electrical	Customer
	Aaron Fitz Electrical	Customer
	Aaron Fitz Electrical	Customer

Note: When searching, you can also adjust the search options to show inactive companies or clients by checking the box that says Show Inactive.

Search Options

Starts With

Show Inactive

Terms:

CRM Contact Card - Allows a user to view the contact card

CRM Contact Properties - Gives visibility to the Contact Properties.

CRM Contact User Fields - Allows access to the user fields on Contacts.