



[Knowledgebase](#) > [SalesPad](#) > [CRM](#) > [CRM Contact](#)

CRM Contact

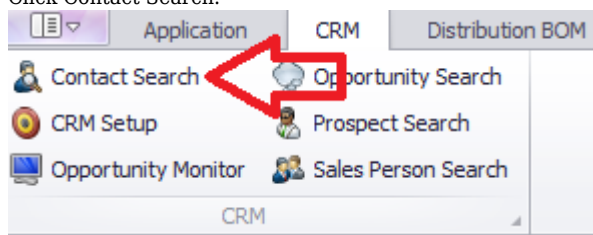
Megan De Freitas - 2024-11-22 - [CRM](#)

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 tab. It shows a search interface with fields for 'Company', 'City', 'Contact', 'State', 'Phone', 'Zip', 'Sales Rep', and 'Contact Type'. There are also search options like 'Starts With' and 'Show Inactive'. Below the search fields is a table 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:
 - o Company
 - o City
 - o Contact
 - o State
 - o Phone
 - o Zip
 - o Sales Rep
 - o 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

A screenshot of the CRM Contact Search tab. The search fields are filled with 'Aaron Fitz' for 'Company' and 'City'. The search results table shows one result with the following details: Number, Name, Type, Address, City, State, Zip, Phone, Sales Person ID, Contact Person, and Address Code.

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
<input checked="" type="checkbox"/> Starts With <input type="checkbox"/> 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.