



Customizing Phone Labels

Megan De Freitas - 2024-11-22 - Setup

To customize a phone label in SalesPad,

1. Open the Settings Module (**Modules > Settings**). The applicable settings are under Customer Contact Options, but you can type "Label" into the filter to find them more quickly

The screenshot shows the 'Settings - TWO - SalesPad' window. The 'Filter' field contains the text 'label'. The 'Customer Contact Options' section is expanded, showing a table with three rows for Phone 1, Phone 2, and Phone 3 labels. The 'Vendor Contact Options' section is also expanded, showing three rows for Phone 1, Phone 2, and Phone 3 labels. The 'Phone 1 Label' field is highlighted, and a tooltip is visible at the bottom of the window.

| Customer Contact Options | |
|--------------------------|---------|
| Phone 1 Label | Phone 1 |
| Phone 2 Label | Phone 2 |
| Phone 3 Label | Phone 3 |

| Vendor Contact Options | |
|------------------------|--|
| Phone 1 Label | |
| Phone 2 Label | |
| Phone 3 Label | |

Phone 1 Label
Custom field label for the [Phone 1] field.
Defaults to 'Phone 1'.

2. In each of the three Phone Label fields, type the desired Label for each phone number

Settings - TWO - SalesPad

Application Case Tracker CRM Distribution BOM Equipment Management Inv

Customer Search Settings

Close Save Export Settings Import Settings

Filter:
label

| Customer Contact Options | |
|--------------------------|----------|
| Phone 1 Label | Work |
| Phone 2 Label | Mobile 1 |
| Phone 3 Label | Mobile 2 |

| Vendor Contact Options | |
|------------------------|--|
| Phone 1 Label | |
| Phone 2 Label | |
| Phone 3 Label | |

Phone 2 Label
Custom field label for the [Phone 2] field.
Defaults to 'Phone 2'.

3. Click **Save**

Before:

Customer Search Settings Customer: [AARONFIT0001] Aaron Fitz Electrical Contact: PRIMARY/Bob Fitz

Close Save

Customer

Customer ID: AARONFIT0001 Customer Name: Aaron Fitz Electrical

| Address | Contact Information | Other Address Info |
|---|---------------------------------------|---------------------------------------|
| Code: PRIMARY | Contact Type: [v] | Warehouse: [v] |
| Alt Comp. Name: Aaron Fitz Electrical | Phone 1: (425) 555-0101 | Sales Rep: West, Paul |
| Contact Name: Bob Fitz | Phone 2: [v] | Sales Territory: [v] |
| Address: 1471 Burke Ave | Phone 3: [v] | Ship Method: LOCAL DELIVERY |
| Zip: 49505 | Fax: (312) 555-0101 | Tax Code: USASTCITY-6* |
| City: Grand Rapids State: MI | Email: carlos.cacheux+AARONFIT0001@sa | Ups Zone: [v] |
| Country Code: US Country: United States | Email To: [v] | File Location 1: [v] |
| | Email CC: [v] | File Location 2: [v] |
| | Web Site: [v] | <input type="checkbox"/> Do Not Mail |
| | Login: [v] | <input type="checkbox"/> Do Not Email |
| | Password: [v] | <input type="checkbox"/> Do Not Fax |
| | | <input type="checkbox"/> Do Not Text |

Comments

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| Contact Audit | Contact User Fields | Contact Resources |
|---------------------|---------------------|---------------------------------------|
| Audit On | User Name | Description |
| 2/1/2018 4:51:30 PM | sa | City changed from Redmond to Grand... |

After:

Customer Search x Settings x Customer: [AARONFIT0001] Aaron Fitz Electrical x Contact: PRIMARY/Bob Fitz x

Close Save

Customer

Customer ID: Customer Name:

| Address | Contact Information | Other Address Info |
|---|---|---|
| Code: <input type="text" value="PRIMARY"/> Alt Comp. Name: <input type="text" value="Aaron Fitz Electrical"/> Contact Name: <input type="text" value="Bob Fitz"/> Address: <input type="text" value="1471 Burke Ave"/> Zip: <input type="text" value="49505"/> City: <input type="text" value="Grand Rapids"/> State: <input type="text" value="MI"/> Country Code: <input type="text" value="US"/> Country: <input type="text" value="United States"/> | Contact Type: <input type="text"/> Work: <input type="text" value="(425) 555-0101"/> Mobile 1: <input type="text"/> Mobile 2: <input type="text"/> Fax: <input type="text" value="(312) 555-0101"/> Email: <input type="text" value="carlos.cacheux+AARONFIT0001@sa"/> Email To: <input type="text"/> Email CC: <input type="text"/> Email BCC: <input type="text"/> Web Site: <input type="text"/> Login: <input type="text"/> Password: <input type="text"/> | Warehouse: <input type="text"/> Sales Rep: <input type="text" value="West, Paul"/> Sales Territory: <input type="text"/> Ship Method: <input type="text" value="LOCAL DELIVERY"/> Tax Code: <input type="text" value="USASTCITY-6*"/> Ups Zone: <input type="text"/> File Location 1: <input type="text"/> File Location 2: <input type="text"/> <input type="checkbox"/> Do Not Mail <input type="checkbox"/> Do Not Email <input type="checkbox"/> Do Not Fax <input type="checkbox"/> Do Not Text |

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