



## 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 'label'. The 'Customer Contact Options' section is expanded, showing a table with three rows: 'Phone 1 Label', 'Phone 2 Label', and 'Phone 3 Label'. The 'Phone 1 Label' field is highlighted. The 'Vendor Contact Options' section is also expanded, showing a table with three rows: 'Phone 1 Label', 'Phone 2 Label', and 'Phone 3 Label'. The 'Phone 1 Label' field is highlighted.

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 Invoicing

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

Comments

Add Comment

Contact Audit	Contact User Fields	Contact Resources
Audit On 2/1/2018 4:51:30 PM	User Name sa	Description 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

Code:

Alt Comp. Name:

Contact Name:

Address:

Zip:

City:  State:

Country Code:  Country:

Contact Information

Contact Type:

Work:

Mobile 1:

Mobile 2:

Fax:

Email:

Email To:

Email CC:

Email BCC:

Web Site:

Login:

Password:

Other Address Info

Warehouse:

Sales Rep:

Sales Territory:

Ship Method:

Tax Code:

Ups Zone:

File Location 1:

File Location 2:

☐ Do Not Mail

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Comments

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