



Mobile Interactions

Megan De Freitas - 2024-11-22 - Miscellaneous

Overview

Interactions are available in SalesPad Mobile for the Customer, Prospect, and Sales Document cards. Interactions are not available for the GP Only server.

It is important to note that interactions created and edited in mobile cannot be directly assigned to Desktop users via mobile, and vice-versa. In order to ensure maximum compatibility between Mobile and Desktop, it is recommended that user names match up between mobile and desktop.

Usage

Once enabled, interactions will be available as tabs on the Customer, Prospect, and Sales Document cards. The tabs contain a list of interactions associated with the customer, prospect, or sales document, as well as a button for creating new interactions. In this tab, interactions display 6 pieces of information: the subject at the top, notes at the bottom, and the contact person, start date, assignee, and completion status in the middle.

Add Interaction

Abe called for pricing

Bob Fitz

9/22/2016

SALESPAD

Abe called to get pricing on some new servers. I gave him the basics and gave him a sweet deal on cutting edge 128 SDRAM.

Test Subject

Bob Fitz

9/21/2016

SALESPAD

Complete

Test Notes



Cust



CRM



Docs



AR



Interac...

Entering a new interaction is split into up to three steps, depending on security settings. First, if the setting *Can Select Contact Person For Interactions* is enabled, the user can select a contact from a list to be associated with the interaction. Contacts which do not have either a Contact Person or First Name specified are filtered out from the list. Tapping the **Skip** button in the top right will take the user to the next section without selecting a contact.

Carrier 

12:38 PM



Back **Select Contact Person** Skip

 Search Text



Bob Fitz

PRIMARY



PRIMARY

Bob Fitz

One Microsoft Way

Redmond, WA 98052

P:(425) 555-0101

F:(312) 555-0101

Bob Fitz

WAREHOUSE



WAREHOUSE

Bob Fitz

11403 45 St. South

Chicago, IL 60603-0776

P:(312) 555-0102

F:(312) 555-0102

Next, the user can edit the primary properties of the interaction, which consists of Subject, Notes, Interaction Type, Status, Assigned To, and Is Complete. Assigned To defaults to the current mobile user, but can be changed to a different mobile user.

Back

Properties

Next

Subject

Notes

Interaction Type



Status

Free



Assigned To

salespad



Is Complete

The user can now edit the schedule information, which consists of a Starts On, Duration, and Ends On. The Starts On must be specified before the other two fields are editable. Tapping the **Clear** button will reset all of the schedule values for the interaction. Tapping the **Save** button will create the interaction.

Back

Schedule

Save

Starts On

9/22/2016



12:00 AM



Duration



Ends On

Select Date



Select Time



Clear

Tapping an interaction opens a prompt that allows the user to edit the interaction's properties and schedule, change the selected contact, or delete the interaction. If the app is offline, interactions that were synced to offline cannot be deleted.

Add Interaction

Interaction Selected

Choose an Action

Edit Properties

Edit Schedule

Select Contact

Delete Interaction

Cancel



Prospect



Contacts



UDFs



Interact

Settings

There are several settings in the mobile server which control the functionality of Interactions, most notably *Can View Interactions*, which is required in order for interactions to appear in the mobile app at all.

The following security settings are located in the Prospects section of the Access Security plugin in the Security Editor.

Available Interaction Columns For Edit - Select the Interaction columns that can be edited while entering interactions in SalesPad Mobile. Defaults to all columns.

Can Select Contact Person For Interactions - Determines whether or not a contact person can be chosen when editing interactions. Defaults to True.

Can View Interactions - Determines whether or not Interaction tabs are visible on the device for the Customer, Prospect, and Sales Document cards. Defaults to False.

Default Interaction Type - The default value for Interaction Type when entering an interaction. Defaults to nothing.

Interaction Type List - Semicolon delimited list of values for interaction types when entering an interaction. Defaults to 'None; Important; Business; Personal; Vacation; Must Attend; Travel Required; Needs Preparation; Birthday; Anniversary; Phone Call; TeleSales.'

The following security setting is located in the Settings module:

Should Sync Interactions - If set to True, the app will make existing interactions available while offline. This will increase the size of the offline database. Defaults to False.