Mobile Interactions

Cavallo Support - 2024-11-22 - Miscellaneous

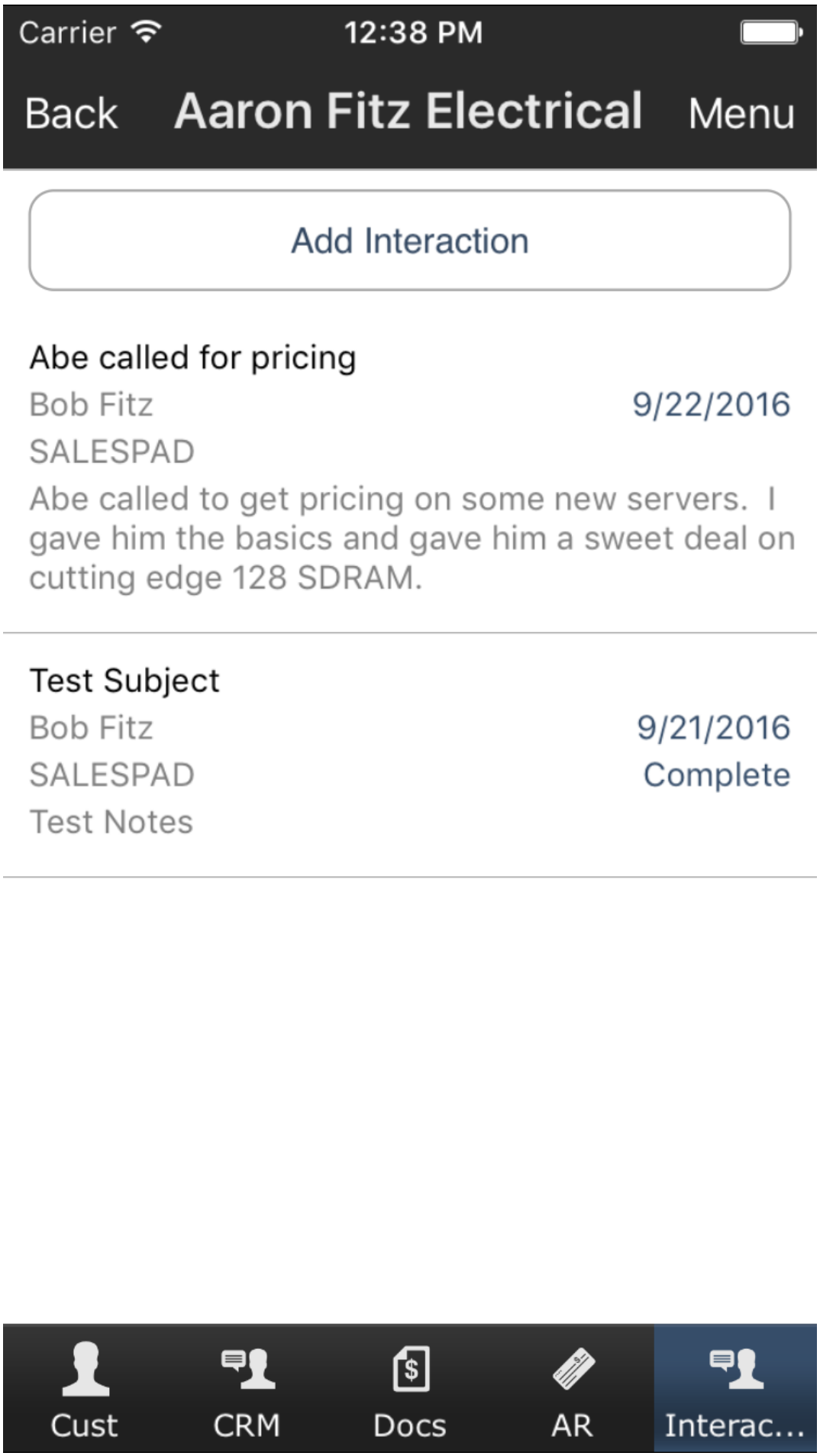
Overview

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

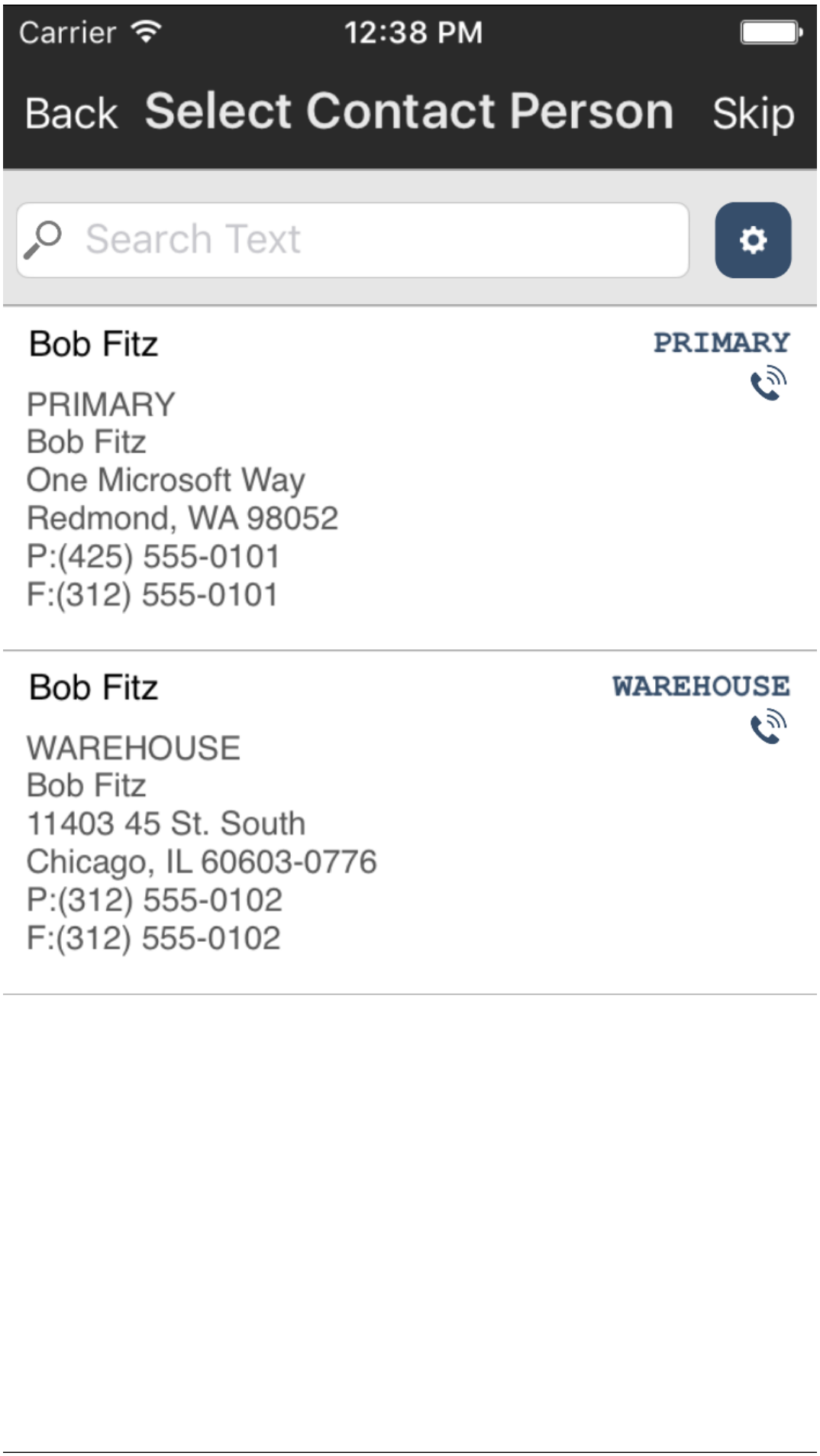
It is important to note that interactions created and edited in mobile cannot be directly assigned to Desktop users via mobile, and vice-versa. In order to ensure maximum compatibility between Mobile and Desktop, it is recommended that user names match up between mobile and desktop.

Usage

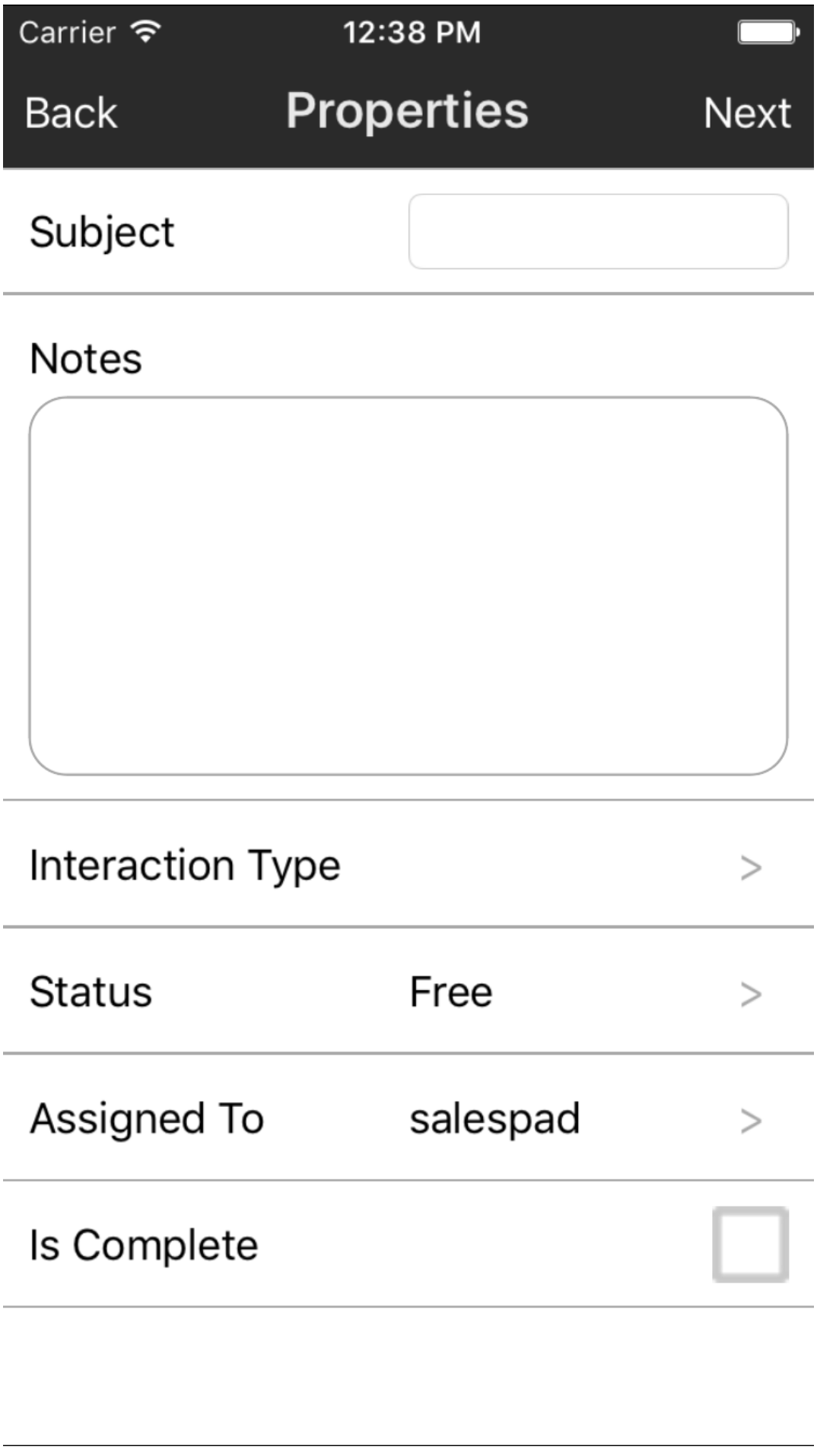
Once enabled, interactions will be available as tabs on the Customer, Prospect, and Sales Document cards. The tabs contain a list of interactions associated with the customer, prospect, or sales document, as well as a button for creating new interactions. In this tab, interactions display 6 pieces of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


Carrier
12:38 PM
Back
Aaron Fitz Electrical
Menu
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...

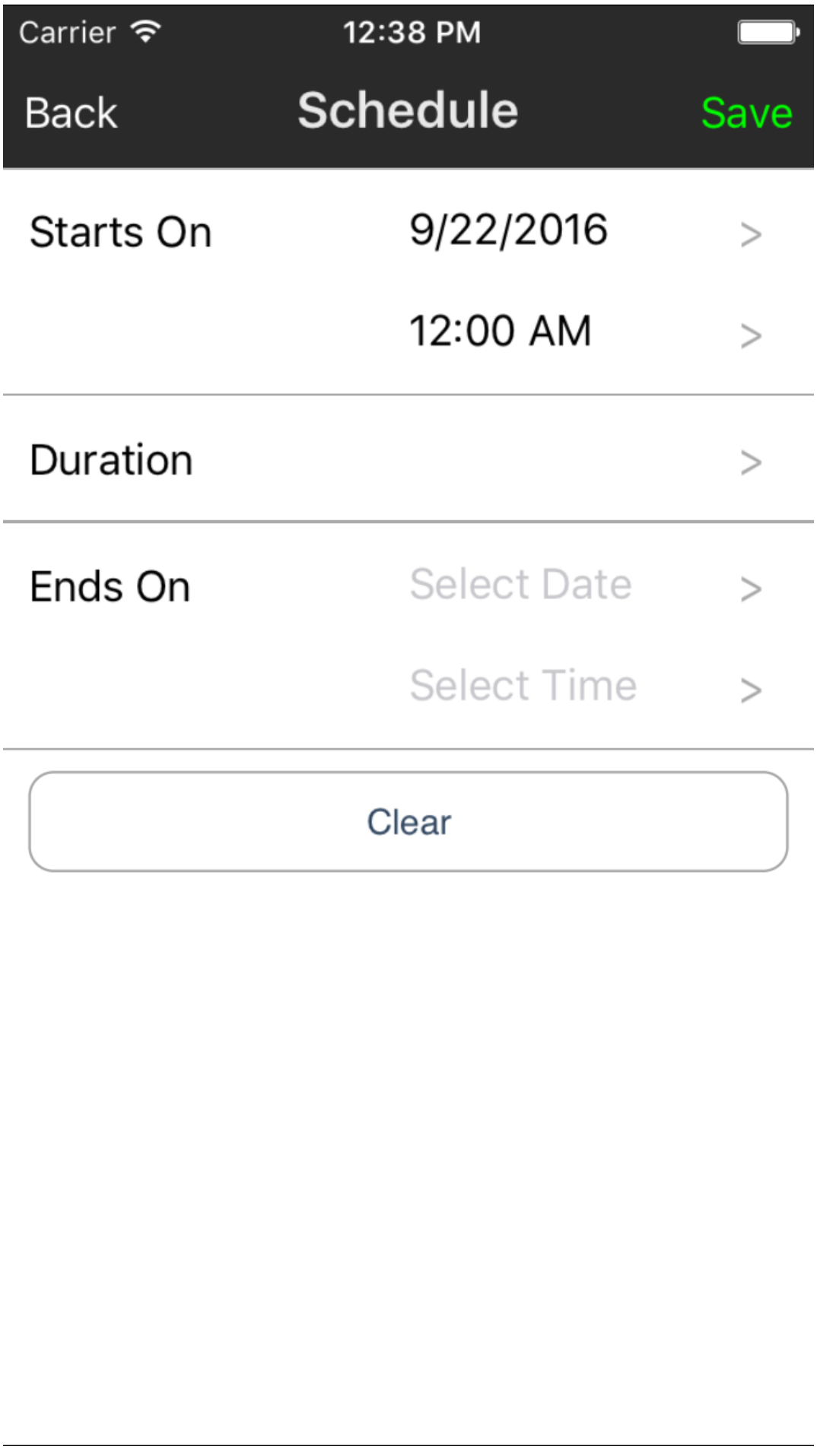
Entering a new interaction is split into up to three steps, depending on security settings. First, if the setting *Can Select Contact Person For Interactions* is enabled, the user can select a contact from a list to be associated with the interaction. Contacts which do not have either a Contact Person 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

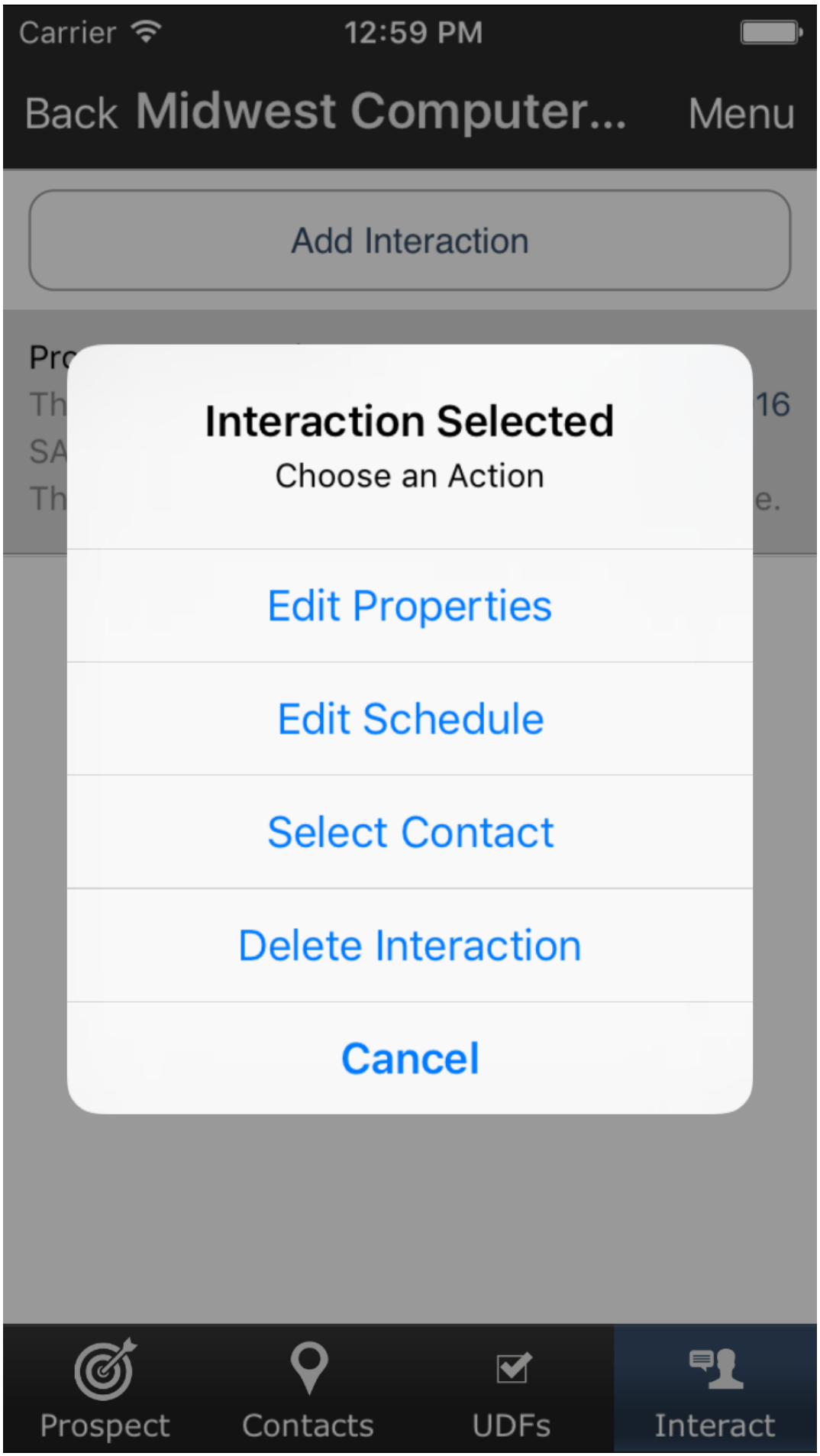
Next, the user can edit the primary properties of the interaction, which consists of Subject, Notes, Interaction Type, Status, Assigned To, and Is Complete. Assigned To defaults to the current mobile user, but can be changed to a different mobile user.


Carrier
12:38 PM
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.


Carrier
12:38 PM
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.


Carrier
12:59 PM
Back Midwest Computer...
Menu
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 visibile 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.