Sales Document Tasks

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Overview

Sales Document Tasks allows users to automatically create a CRM task on the customer card from any sales document, based on document characteristics and items on the document. Sales Document Tasks can be created manually or as part of workflow, and can be created for the sales document itself, or for specific line items on the document.

Attached Files

- Item Master UDFs
- Sales Line UDFs

Setup

To enable Sales Document Tasks, the securities *Sales Document Tasks* and *CRM Event Entry* must be enabled in the Security Editor.

The following Misc sub-settings under Sales Document Tasks should be set:

Document Task Days – Set the number of days out (from date of document creation) to set the Task

Document Task Notification – Set to True to receive document task notifications

Document Task Type **–** Enter the CRM task types from the CRM Log Type Options setting (see the Settings module) here

Document Task Years – Set the number of years out (from date of document creation) to set the Task

Item Single Task - Set to True to group tasks and take all relevant settings from the first item

Item Task Days Field **(**ex xTaskDays) - Enter the item master user defined field that holds the Task Days value. It will set your task x days out from today

Item Task Notification Field (ex xTaskNotification) - Enter the user defined field that holds the Task Notification value **Item Task Subject Field** (ex xTaskSubject) In versions 4.0.1471 and later, enter the user defined field that holds the Task Subject value (will be appended to a task's subject line)

Item Task Type Field (ex xTaskType) - Enter the user defined field that holds the Task Type value

Item Task Years Field (ex xTaskYears) - Enter the user defined field that holds the Task Years value

Item Use Serial Information **-** Set to True to use the serial number instead of the item information in the task description— If True, the task description will include the item's serial number; if False the task description will include the item number. **Run Document Task** Set to True to create tasks at a document level

Run Item Task **-** Set to True to create tasks at an item level

User Defined Fields

User Defined Fields are used to store the setting values which will control the specific details of each task being scheduled. These UDFs can be created manually or by importing the attached .xml file containing predefined UDFs.

User Defined Fields must be created for the following Security settings:

Note: The Item Task Subject Field may not be available in versions prior to 4.0.1471.

1. Create the appropriate user defined fields in the User Field Editor (refer to the SalesPad User Defined Fields document for information on configuring user defined fields) to set up the 5 user fields on the Item Master
2. Change the Value Options for the Task Type UDF (the .xml import uses "Rabies;Vaccination" as an example) to the relevant task types in your CRM Task Status Options in SalesPad Settings (refer to the SalesPad CRM tasks and notes document)
   
3. Enter the names of the UDFs into the appropriate Security fields (see the Security section below)

Usage

A couple of examples of how someone might use Sales Document Tasks:

At the document level:

A heating, ventilation, air conditioning (HVAC) company that performs annual inspections on furnaces and air conditioners may want to schedule a reminder to contact customers for their annual inspections as they invoice the current inspection.

At the item level:

A company selling water purification systems may want to schedule a line item task based on the purchase of specific filters that have known estimated life spans. The reminder would be useful in contacting customers to replace their worn filter.

If you are creating tasks at the item level, you will want to open Inventory Lookup and select the check boxes to indicate eligible items (Item Task Notification field) before creating a task.

To create a task:

Create a new sales document for a customer

Open the Actions dropdown on the header, and select Tasks.

No indication will appear, but a new task will appear on the Customer Card CRM tab. You may need to refresh the customer's Customer Card to view the task

Scheduled tasks can even be set up as part of Workflow so eligible documents create tasks automatically. For more information on setting up Workflow, refer to the SalesPad Workflow document.

For more help with the setup of Sales Document Tasks specific to your company, you can contact SalesPad Support.

Note to Microsoft Outlook users: CRM Tasks created in SalesPad can automatically be added to your Outlook calendar by using the SalesPad GP Outlook Add-in. This inexpensive add-in allows Outlook users to send customer emails to SalesPad CRM Notes and pull SalesPad CRM Tasks onto their Outlook calendar

Further Resources

- Documentation