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SalesPad Mobile Contacts

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OVERVIEW

The Contacts module allows users to search for and select a specific contact and view the contact's general information. It also provides the ability to email or call them directly from the app.

LOOKUP

The Contact Lookup screen is used to search for and select specific contacts. Once a contact has been selected, a menu is presented prompting the user if they wish to view more information, email, or call the customer. If Go to Contact is selected, the user is forwarded to the Contact Card, which contains general information about the customer, accessed through tabs at the bottom of the screen. Choosing either to call or email the contact will trigger the device to dial the number or open an email authoring window.

•		e e				
Carrier 🗢 9:29 AM	-	Carrier 🗢 9:30 AM	-	Carrier 🗢	9:29 AM	-
Back Contacts	Menu	Back Contacts	Menu	Back	Contacts	Menu
Search Text		₽ bob	× -	Search		× -
ACCOUNTING COMMUNICATION CONNECTION	BILLING	BOB FITZ FDSA /ASDF	PRIMARY	ACCOUNTI COMMUNICA	NG TION CONNECTION	BILLING
ACCOUNTING COMMUNICATION CONNECTION	BILLING	BOB FITZ GUFF /GFHHFGHCHERRY	warehouse	ACCOUNTI COMMUNICA	NG TION CONNECTION	BILLING
ACCOUNTING BAKER'S EMPORIUM INC. /BAKE	ACCOUNTING	BOB FITZ FUND UGH /CLICHÉD	WAREHOUSE	ACCOUNTI BAKER'S EMI	NG PORIUM INC. /BAKE	ACCOUNTING
ACCOUNTING BERRY MEDICAL CENTER /BERR	BILLING	BOB FITZ GUFF /FUNDY	WAREHOUSE	Contac	t Communication Con COMMUNIC0001	nections /
ACCOUNTING DEPT NORTHERN FAMILY HOSPITAL /N	ACCOUNTING	BOB FITZ GUFF /GIFT	WAREHOUSE		Go to Contac	xt
ACCOUNTING DEPT. LAWRENCE TELEMARKETING /L	BILLING	BOB FITZ HUBBUB /GFHHFGHCHE	WAREHOUSE	10000	Edit Contact	
ADMINISTRATION OFFICE POLK VALLEY HIGHWAY DEPT. /P	PRIMARY	BOB FITZ AARON FITZ ELECTRICALL /AAR	WAREHOUSE		ne 1: (204) 555	5-0141
AJ GROTHER	BILLING	BOB FITZ	WAREHOUSE	Las anorm	Cancel	

MENU

The Contact Card contains a number of unique slide menu actions, detailed below.



Tapping any call or email rows will cause the device to dial the associated number or launch the device's default email composition screen.

Tapping the Go To Customer option will bring the user to the Customer card to which this

contact corresponds.

Tapping **Create Contact** or **Copy Contact** will create a new contact. If **Copy Contact** is selected, the new contact will have the same address, phone numbers, and email address as the original.

Tapping **Edit Contact** will make the contact card editable, which is described in more detail below.

CONTACT CARD

The Contact Card contains general information about the contact, and consists of several tabs (defined below).



CRM

The CRM tab displays any CRM notes associated with the customer, and allows the user to add a new CRM note.



UDFS

For users of the SalesPad desktop application, if there are any user defined fields declared for contacts, they can be viewed here.



Contact Entry

OVERVIEW

A new Contact can be entered in three different ways: through the Contact option under the Entry category of the slide menu, via one of the options to create or copy a contact on an existing contact's card, or by selecting Create Contact from a customer's card. Creating a contact from an existing customer or contact will skip the customer selection pages of the wizard.

CUSTOMER PROMPT

In Dynamics GP, a Contact requires a Customer. For this reason, the first screen of the Contact Wizard prompts the user to enter a customer. The user may either select an existing customer or create a new one. If the user does not have the *Can Create Customers* permission from the server, they will only be able to select an existing customer.



SELECT EXISTING CUSTOMER

Tapping the **Select Existing** option on the previous page will launch a customer search screen.

Carrier 🗢 11:05 AM Back Select Customer	-	Carrier 🗢 11	Customer
Search Text	× -	🔎 Aaron	× (
AARON FITZ ELECTRICAL		AARON FITZ ELECTR	RICAL
BB 100527		AARON FITZ ELECTR AARONFIT0001	RICAL NANCY B.
BB234 100528			
BEHEJEJD 100529			
BRETTASDF 100530			
ASDF 100531			
BB 100532			
DANIEL GRISWORTH			

CUSTOMER ENTRY

Selecting the **Enter New** option on the Customer Prompt page will launch a customer edit list. The fields available on this screen can be configured via the Access Security -> *Customer -> Available Customer Columns for Edit* option in the server. The Customer Name field is required. If the Customer Num field is left empty, one will be automatically generated.



CONTACT FIELDS

The final screen of the wizard will allow the user to enter important contact fields. The Addr Code field is required. The fields available in this list may be configured via the Access Security > *Contacts* > *Available Customer Contact Columns for Edit* option in the server.

Upon tapping **Next** on this screen, the contact will be saved. If a customer was created via this process, this contact will be set as that customer's primary bill to and ship to addresses.

Carrier 🗢	9:28 AM	-
Back	Contact Entry	Save
Address C	Code	
Contact P	erson	
Address L	ine 1	
Address L	ine 2	
Address L	ine 3	
City		
State		
Zip		
Country		
Email		

Contact Editing

To edit a contact, select the **Edit Contact** option from the slide menu of a Contact card. The contact card appears similar to the read-only card, but has orange gear icons to indicate sections that can be edited.

	Bob Fitz	Save
WAREHOUSE BOB FITZ 11403 45 ST. SOU SECOND LINE YO CHICAGO, IL 6060 P:(312) 555-0102 F:(312) 555-0102		
	PROPERTIES	
Customer Num	AARONFI	T0001
Address Code	WAREH	OUSE
Email	Warehouse@Ema	il.com
Phone 1	(312) 555	-0102
Phone 2	(312) 555	-0102
Phone 3		
Sales Person ID	GR	EG E.
Created On		
Changed On	3/27	/2014

Tapping anywhere in the Properties block will open the properties editor, where users can change the contact name and address.

Carrier 🗢	9:34 AM	
Cancel Pr	operties Accept	
Customer Num	AARONFIT0001	
Customer Name	Aaron Fitz Elec	
Customer Class	USA-MNWI-T4 🕨	
Sales Territory	TERRITORY 3	
Payment Terms	3% 15TH/NE	
Price Level	RETAIL	
Currency ID	Z-US\$	
Tax Schedule	USASTCITY-6*	