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.

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.

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.

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.

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