SalesPad Today

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Overview

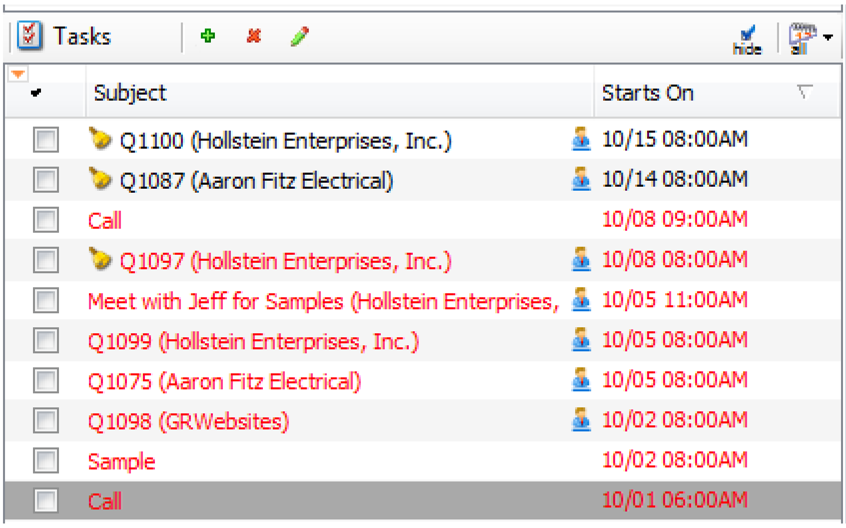
The SalesPad Today module provides a calendar view for managing CRM and other tasks. With proper security users can view their own tasks as well as other users' tasks.

Usage

TASK LISTS

Task Lists is an auto-generated list that displays task types and counts. This data is populated from the Task Entry window*.

TASKS

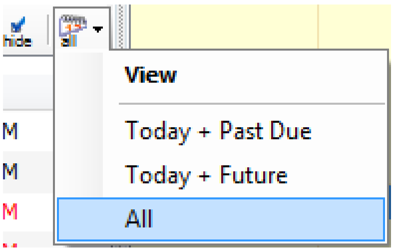


Individual tasks display under Tasks. Past due tasks appear in red, tasks marked as complete appear with a line through them, and future tasks are plain black. Tasks linked to a customer account display the person icon ( ) and tasks with a reminder display the bell icon ( ).

Click the **Show/Hide** ( )( ) toggle button to show or hide completed tasks.

Change the tasks to display by opening the view dropdown ( ) and selecting Today +

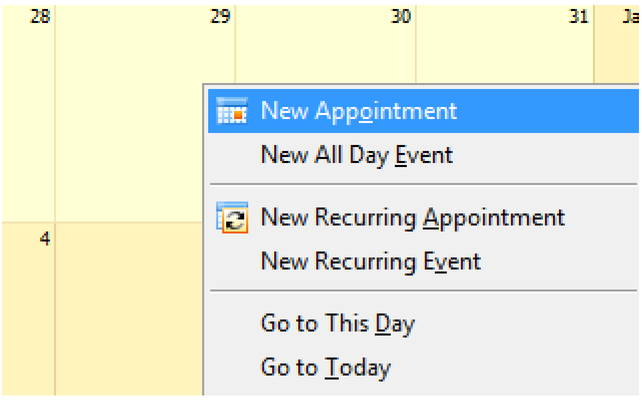
Past Due, Today + Future, or All.

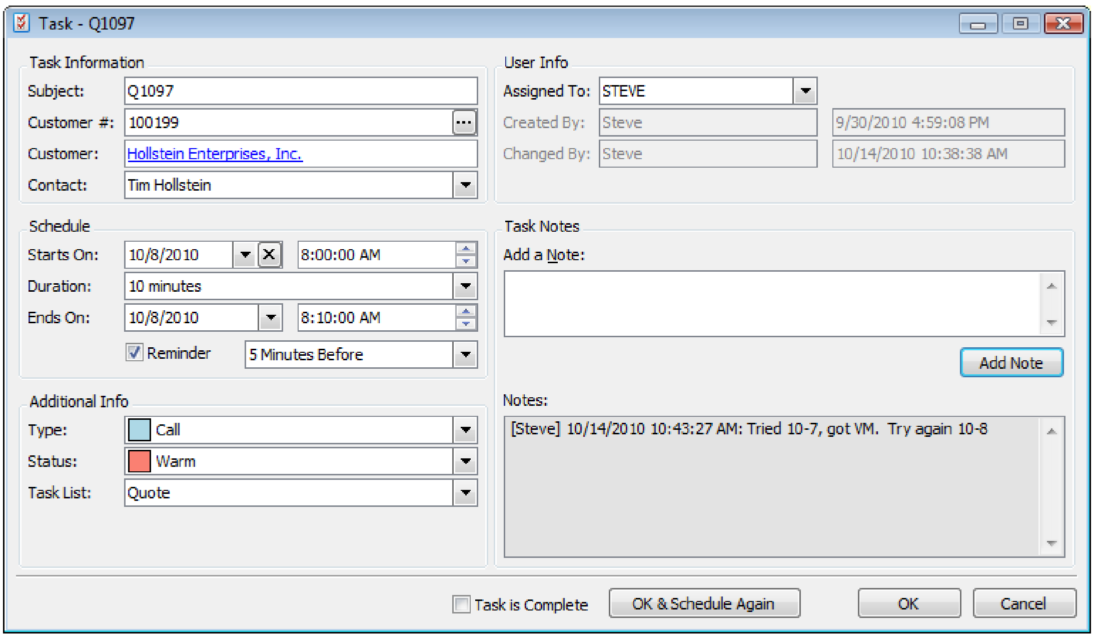


Note: User Defined Fields from the Customer business object (see: User Defined Fields) can be added to the Tasks grid using the Column Chooser. If the user field columns have been added to the grid, but no data is being populated, first verify that there is actual data in the fields on the Customer Card. If so, refresh the views in SQL and then go to the User Field Editor module in SalesPad and Save & Update the Database on the Customer business object.

TASK ENTRY WINDOW

The Task Entry window is accessible by clicking the New Task ( ) or Edit Task ( ) button on the Tasks grid, by right-clicking on the calendar and selecting New Appointment, or by double-clicking a specific date in the calendar.

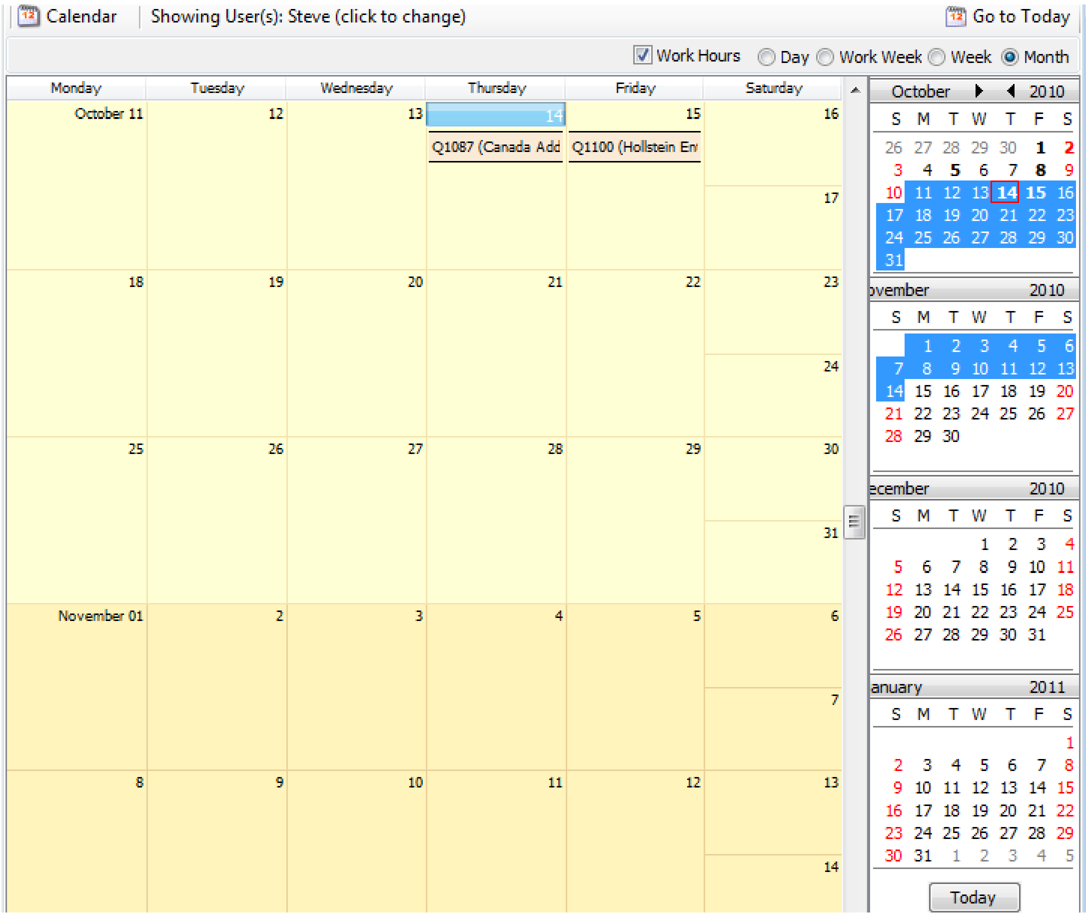




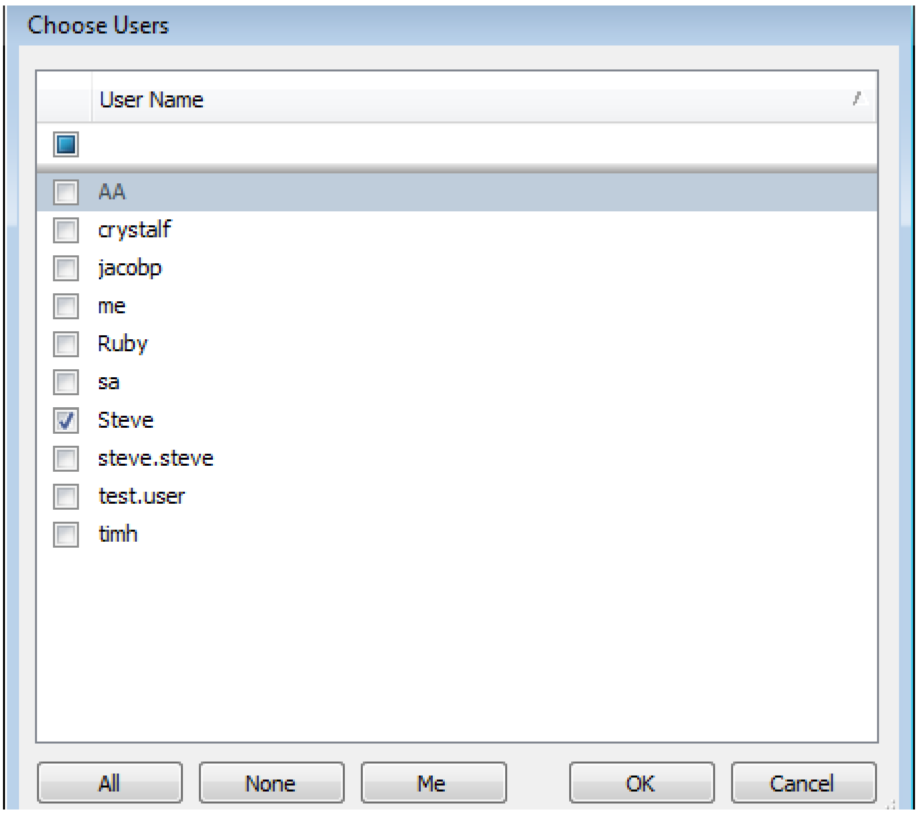
- You can select a customer by clicking the ellipsis (…) next to Customer # and conducting a customer search. Adding the customer account to the task will create a link () to the Customer Card on the task.
- When a link is made to the Customer Card, contacts will be pulled from the Customer Card.
- If you set Starts On and Ends On as two different dates, tasks will display for the duration of time between the two dates.
- Check the **Reminder** box to have a window appear in SalesPad to notify you about the task before it occurs.*
- Select task Type and Status from the dropdowns. See the Settings section of the CRM Tasks and Notes document for instructions on changing the Type or Status options.
- Enter a name into the Task List field; any Task Lists with the same name will be arranged into groups.
- If security is enabled, you can create and assign tasks to other SalesPad users from the Assigned To dropdown.
- Notes entered under Add a Note will appear as a From Task type on the right side of the CRM tab on the Customer Card.

CALENDAR

- Double-click on a calendar date to create a task.
- Bold dates on the monthly calendars to the right have tasks; red dates denote weekends:

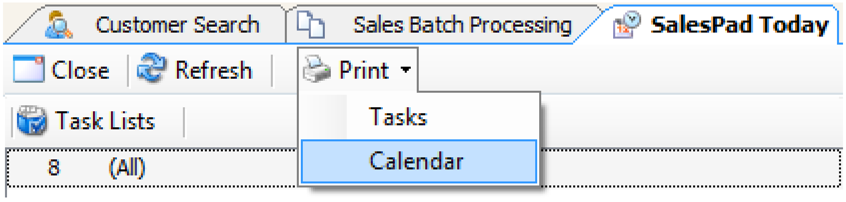


To display other users' tasks on the calendar, click on **Showing User(s)**, select users from the Choose Users window, and click **OK**:



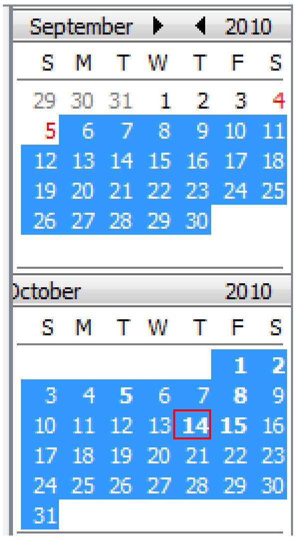
PRINT OPTIONS

You can print either a calendar or a list of tasks by using the dropdown on the print icon:



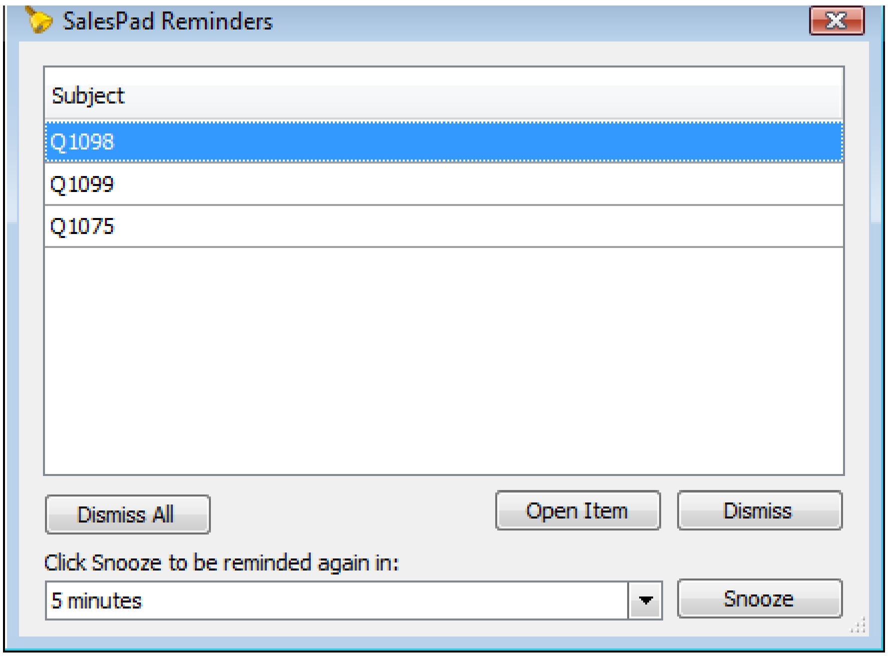
When printing a calendar, any highlighted months in the monthly calendars on the right will print.

Note: Even if you select a single day on a month, all dates for that month will print.



REMINDER

The "Reminder" window pops up when events are scheduled to include it:



SalesPad Today must be an open tab for reminders to appear.

Security

SalesPad Today **-** Enables SalesPad Today for the Security Group.

Additional security and settings may be required for all functionality. Refer to the SalesPad CRM Tasks and Notes document for more information.