Zip Code Functionality

Megan De Freitas - 2024-12-03 - Setup
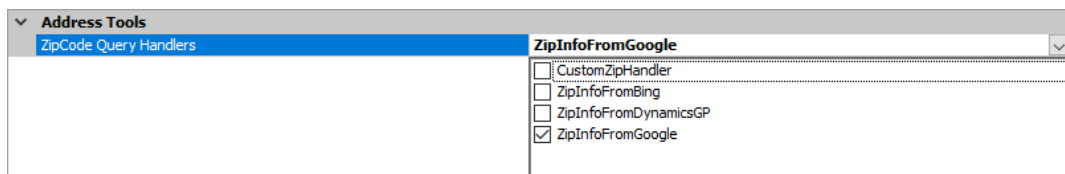
Overview

Zip Code Functionality available in SalesPad will pull data to automatically complete a contact's city and state once the zip code has been entered. Users can choose to pull data from Dynamics GP, Google, Bing, or from a locally stored table.

Note: WebServiceX is a former option for this setting, but has since been removed from SalesPad. As the service no longer functions correctly, the option must be unselected to prevent delays in entering customer address information.

Setup

Using a locally stored table for Zip Code Functionality requires loading a custom stored procedure onto the database (Contact your Account Manager for more information). Using Dynamics GP, Google, or Bing only requires selecting the correct option from the *ZipCode Query Handlers* setting in the Settings screen:

Custom Zip Code Query Handler Example

The following procedure is an example of a custom query for retrieving addresses from a custom table:

SET ANSI_NULLS ON

GO

SET QUOTED_IDENTIFIER ON GO

CREATE PROCEDURE [dbo].[spcpGetCustomZipInfo]

@zip AS CHAR(11) AS

BEGIN

DECLARE @zipCode INT; SET @zipCode = NULL;

IF (ISNUMERIC(@zip) = 1) BEGIN

SET @zipCode = CAST(substring(@zip,1,5) AS INT) --Cast first 5 digits as int END

```
IF (@zipCode IS NOT NULL) BEGIN

SELECT TOP 1

CITY, STATE, ZIP, COUNT(*) AS 'COUNT' FROM ZipCodes (NOLOCK)

WHERE ZIP = @zipCode GROUP BY CITY, STATE, ZIP

END END

GO
```

Usage

The Zip Code Functionality tool is available when a user is entering a new customer or contact in SalesPad. When the user is typing in the contact information and enters the zip code, SalesPad will automatically complete the Contact Address City and State.