

Quadpro

Quadpro Contacts

V5.14 Update









Update Notes:

- In version v5.14 we have updated the user area of the Quadpro Desktop system. This is to make it easier to manage your suppliers, contacts and web users.
- Accessing this part of the module is now via the navigation menu on the home screen under the **Service Providers** tab.



Contacts Home Screen

Opening the Contacts option you will see a list of all the service providers in your system. This update offers an improved user interface for accessing and organising your Job Request Originators and other contacts.

Service Providers						
<div> Done  Add  Query  Select  Show all  Sort  Refresh  Delete</div>						
Ref	Name	Town	County	Telephone	Email	
393	1st-Surface Ltd	Weybridge	Surrey	01932340011	terry@1st-surface.co.uk	
418	2 Start Ltd	Portsmouth	Hampshire			
538	2nd Surface					
152	A & B Landscapes and Garden Maintenance Ltd	Fareham	Hampshire		ab-landscapes@ntlworld.com	
19	A D Mechanical Services Ltd			023 92 617070	info@admsuk.com	
79	A.C.E. Security			01892534720		
115	A&D Mechanical					
476	A&J Lawrence Ltd		Hampshire	02392221167	AJLinfo@page-automotive.co.uk	
239	A1 Security Systems Ltd	Petersfield	Hampshire	01730 266811		
130	AbacusLighting Ltd	Sutton-in-Ashfield	Nottinghamshire	01623 511111		
240	ABC Glass Processing Ltd	Portsmouth	Hampshire	02392 678222	info@abglass.co.uk	
157	Access Control Automation Ltd	Bognor Regis	West Sussex	01243 830641	sales@accesscontrolautomat	
271	Access Panel Company					
305	Accordial	Loughborough		01509611203		
316	Adams Morey	Portsmouth	Hampshire	02392691122	joanne.collinson@adamsmorey.co.uk	
337	Admin				contracts@zipindustries.co.uk	
241	ADP Security Systems Ltd	Petersfield	Hampshire	01730 261510	controller@adpsecurity.com	
285	Advanced Locking & Locksmiths					

Displaying 358 records

Consultants

☐ Not Active

New tool bar buttons added at the top of the table provides the same options as in other Quadpro modules.

All service providers are listed in this table, including your Job Request Originators

At the bottom of the table you can search by name, or filter by type and Not Active providers using the options shown.

Adding a new provider:

Press the **Add** button and a new dialog window will appear. Enter all relevant details about the new record. Under the **General Tab** any contacts associated with this provider can be added. They will appear in the list shown.

Name * **Account Ref**

Details

Building **County**

Street **Postcode**

Area **Telephone**

Town **Email**

Active ☒

General **Approvals** **Documents** **Types & Notes**

First Name	Surname	Email	Department	Position
Joe	Bloggs	jb@acmeltd.com		Sales Manager

Displaying 1 records

Enter information about this service provider in the fields shown. Any contacts associated with this provider are listed in the table below.

Adding a Contact to the Service Provider:

Press the add button at the top of the service provider record and a new form for you to complete will display.

Enter all user information in the fields in the General Information area of the form.

Any approvals required can be configured in the Approvals area, and any Permitted Services can be applied to the user.

Web Access Type and Resources are assigned using the dropdown menus.

General

General Information

Sal

First Name

Surname

AD Username

Position

Department

Phone

Fax

Mobile

Email

Password

Signature

Notes

Left Employment ☐ Form User ☒

Locked ☐

Approvals

Default Site

Default Building

Buildbase EmployeeID

Permitted Services

Job Request Creation	4	0
Referred To	15	0

Web

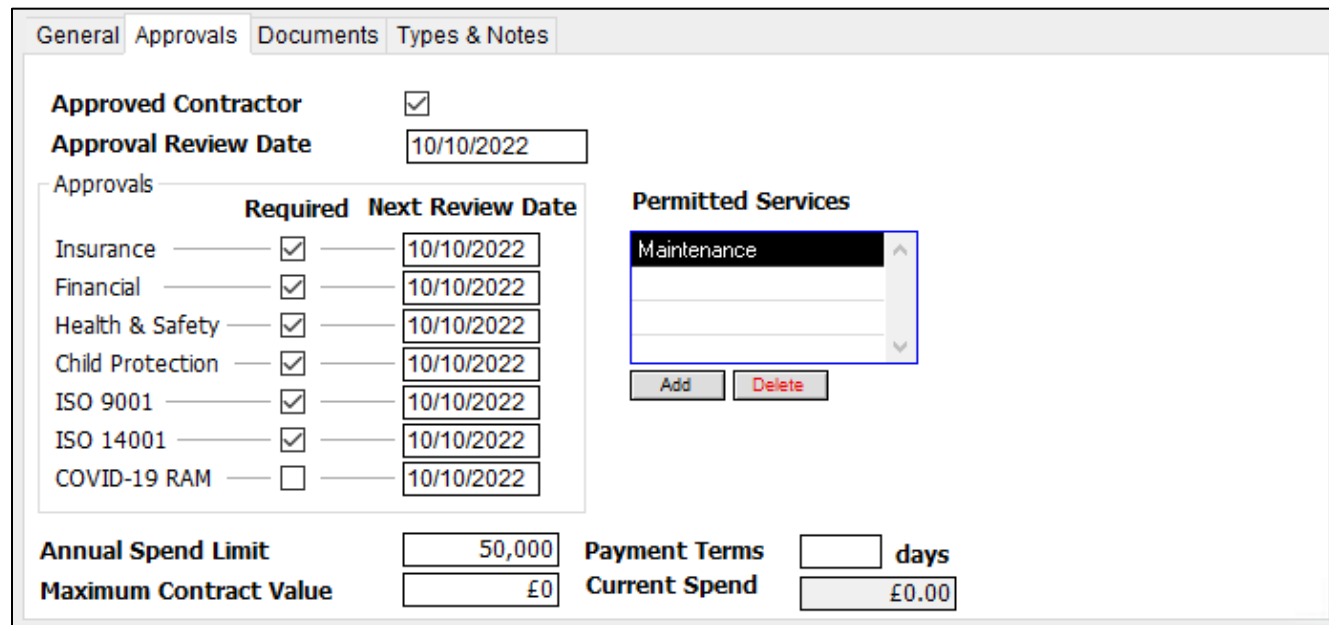
Access Type

Resource

Risks

Approvals:

- Under approvals you can configure approval reviews for each supplier as well as add any permitted services for what they can work on. Spending limits can also be implemented using the fields below.



General Approvals Documents Types & Notes

Approved Contractor ☒

Approval Review Date 10/10/2022

Approvals

	Required	Next Review Date
Insurance	<input checked="" type="checkbox"/>	10/10/2022
Financial	<input checked="" type="checkbox"/>	10/10/2022
Health & Safety	<input checked="" type="checkbox"/>	10/10/2022
Child Protection	<input checked="" type="checkbox"/>	10/10/2022
ISO 9001	<input checked="" type="checkbox"/>	10/10/2022
ISO 14001	<input checked="" type="checkbox"/>	10/10/2022
COVID-19 RAM	<input type="checkbox"/>	10/10/2022

Permitted Services

Maintenance

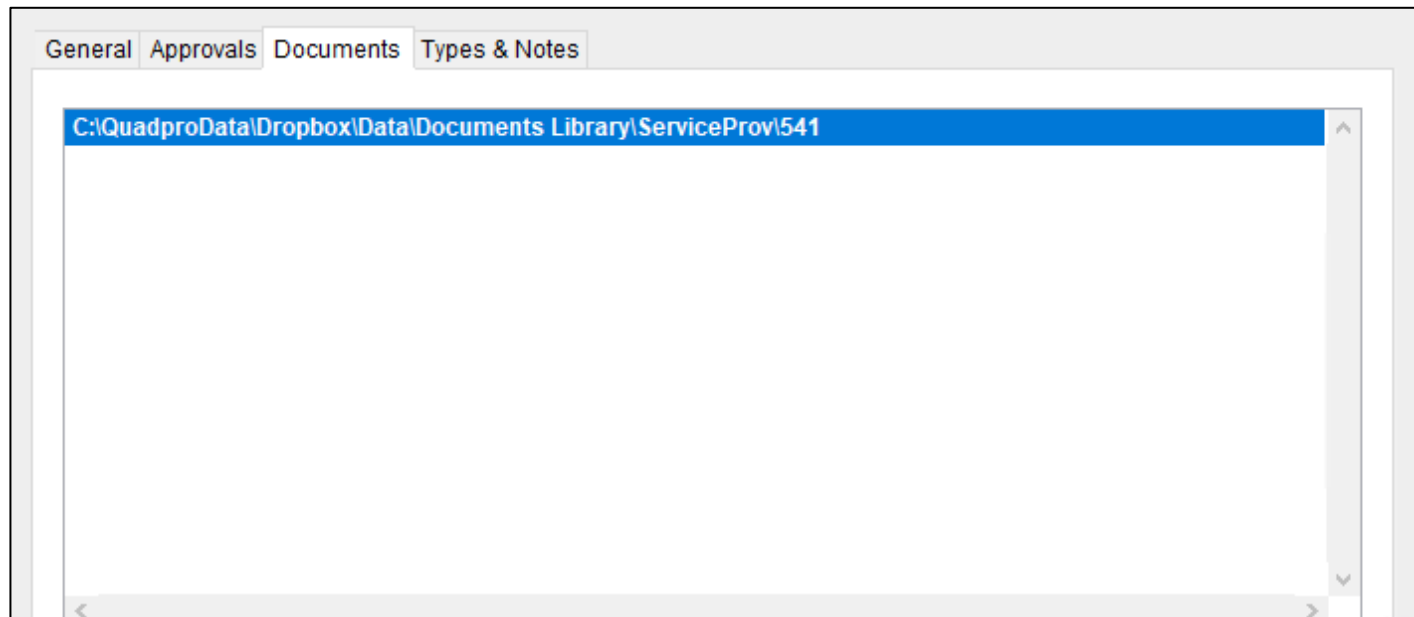
Add Delete

Annual Spend Limit 50,000 **Payment Terms** days

Maximum Contract Value £0 **Current Spend** £0.00

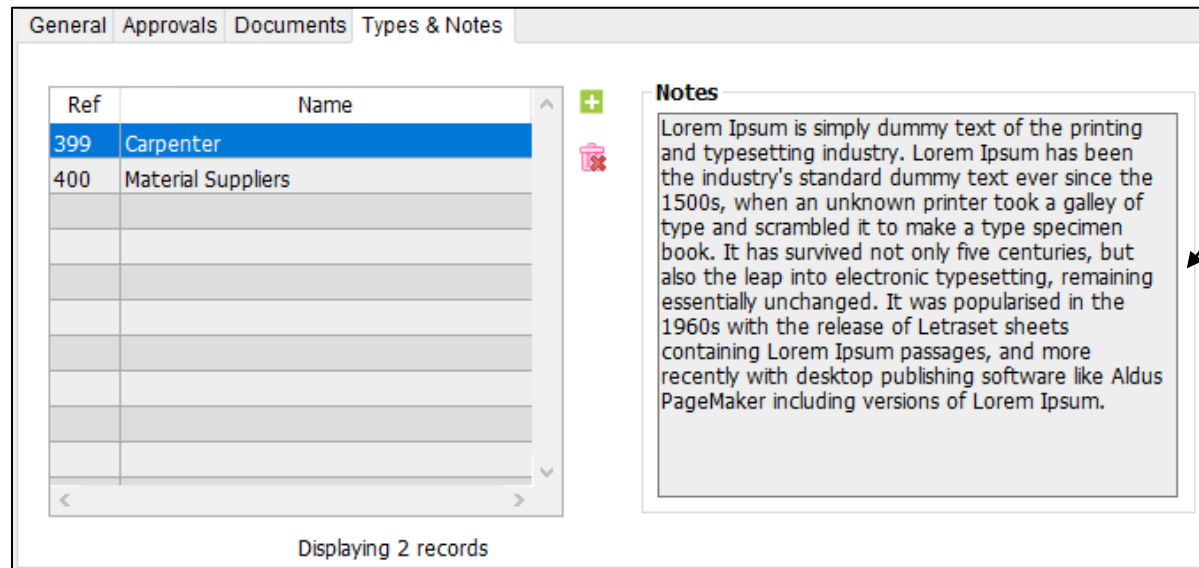
Documents:

Any documents relevant to this Service Provider can be safely stored in the documents area. Double click on the folder path and you can transfer files in as and when needed.



Types & Notes

You can assign more than one type to a Service Provider, this can be for a company that provides more than one type of service. Use the **Add** button you can choose these from the list. To remove a type from this supplier, click on the record and press the delete button.



The screenshot shows a software interface with a tabbed menu at the top: 'General', 'Approvals', 'Documents', and 'Types & Notes'. The 'Types & Notes' tab is active. On the left, there is a table with two columns: 'Ref' and 'Name'. The table contains two rows: '399 Carpenter' and '400 Material Suppliers'. Above the table are a green '+' button and a red 'x' button. To the right of the table is a large text area labeled 'Notes' containing a paragraph of Lorem Ipsum text. Below the table, it says 'Displaying 2 records'.

Ref	Name
399	Carpenter
400	Material Suppliers

Displaying 2 records

Notes

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Any notes related to the service provider can be added under the **Notes** field.

Additional Filters:

- You can filter for a user by department or search for a user by first name. Ticking the options shown will display the users with the chosen criteria. Press the **reset filters** button to revert the list to show all users in that service provider record.

Department	All ▼	<input type="checkbox"/> Left Employment	<input type="checkbox"/> Lock	Reset Filters
First Name	<input type="text"/>	<input type="checkbox"/> Form User		