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.

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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.

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.

Contacts Area V5.14 User Guide

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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	*	ACME Ltd		Account Ref	

Details

Building	Main Building	**County**	
Street	Old Street	**Postcode**	I12 122
Area	Hackney	**Telephone**	0208574643
Town	London	**Email**	info@acmeltd.com
		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.

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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	Peter
Surname	Smith
AD Username	psmith
Position	Admin Director
Department	Administration
Phone	01708 722373
Fax	
Mobile	07712273838
Email	psmith@school.com
Password	********
Signature	
Notes	Contact for any enquires admin related

Left Employment ☐ Form User ☑
Locked ☐

Approvals

Default Site	Main Site
Default Building	
Buildbase EmployeeN	

Permitted Services

Job Request Creation	4	0
Refered To	15	0

➕   🗑

⚠ Risks

Web

Access Type	Manager
Resource	Administration

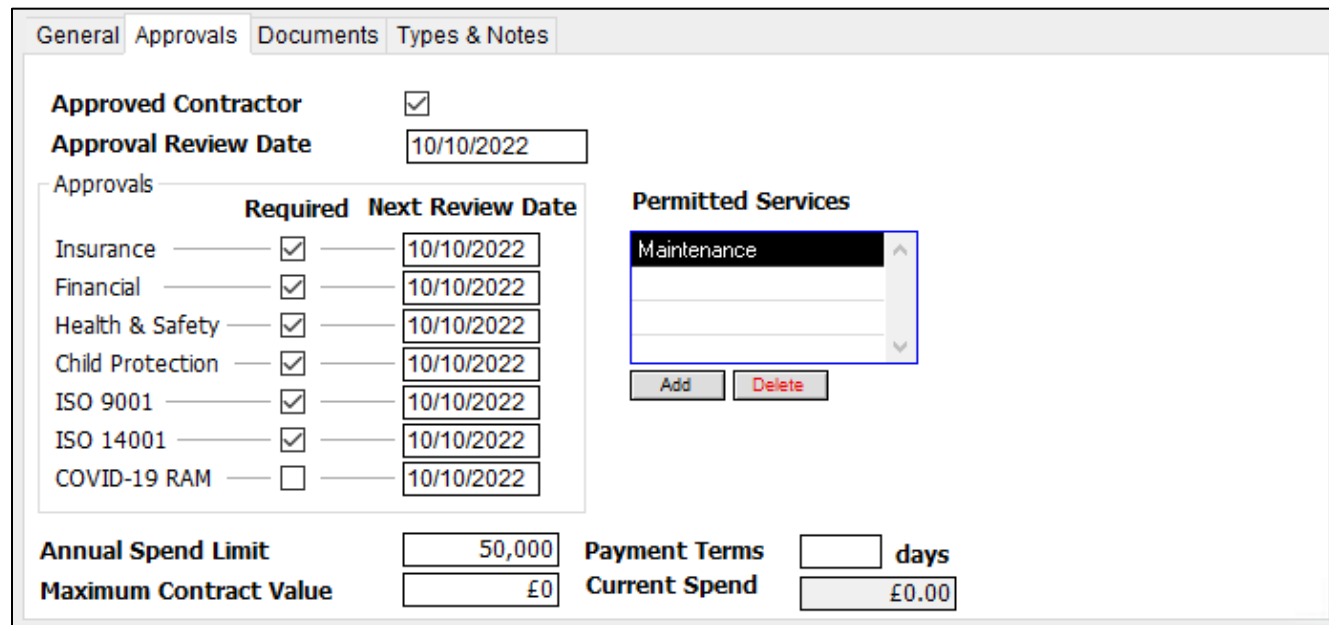Quadpro

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.
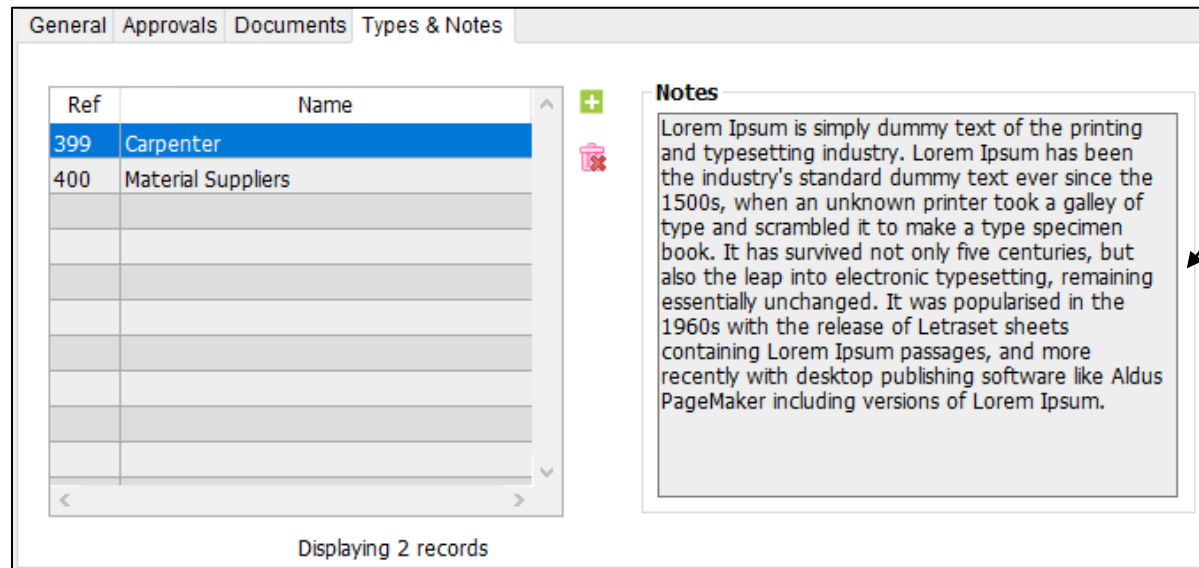
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Documents:

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.

| General | Approvals | Documents | Types & Notes |

C:\QuadproData\Dropbox\Data\Documents Library\ServiceProv\541
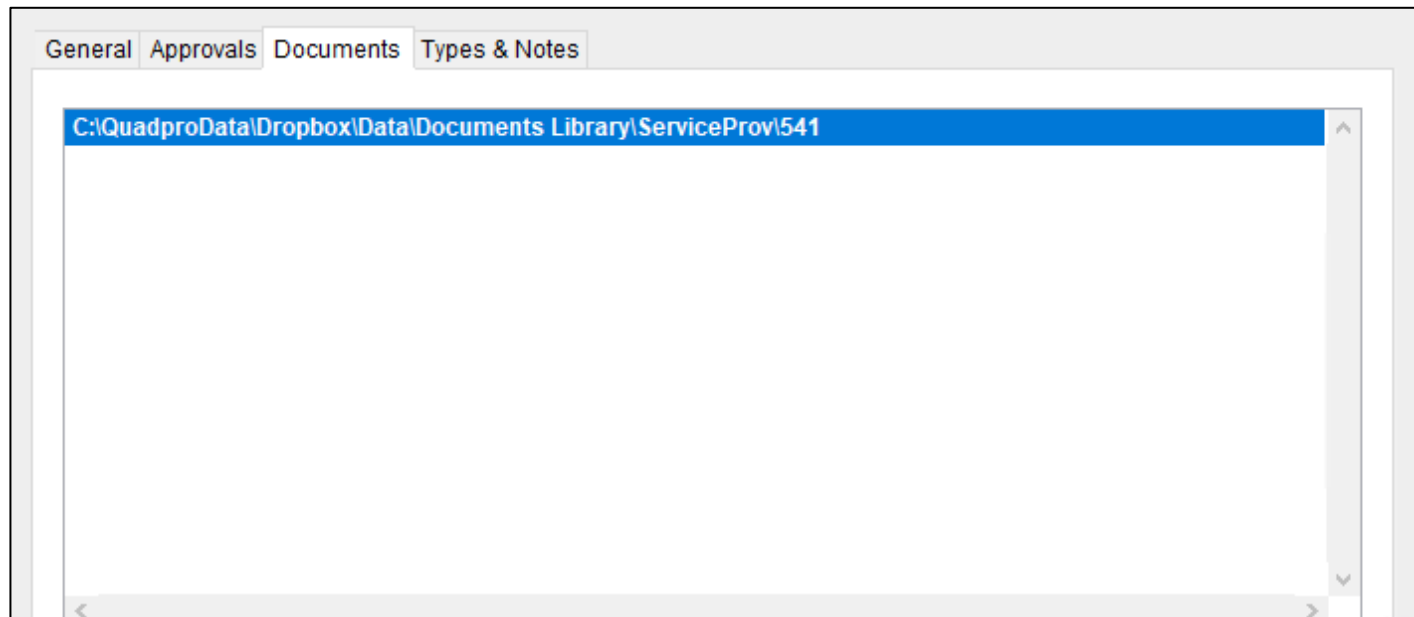
Types & Notes

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.

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

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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.

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