



CardControl Customer Creation

Megan De Freitas - 2024-12-02 - Miscellaneous

Important Notice

After October 29, 2019, SalesPad will no longer be supporting CardControl.

Additionally, the application will cease to be a PA-DSS validated solution as of this date, and therefore CardControl customers would no longer be PCI compliant.

Instead, SalesPad Desktop now offers built-in credit card processing via [Nodus PayFabric](#). If you have questions or want more information on our credit card processing services, [please contact your sales rep.](#)

Overview

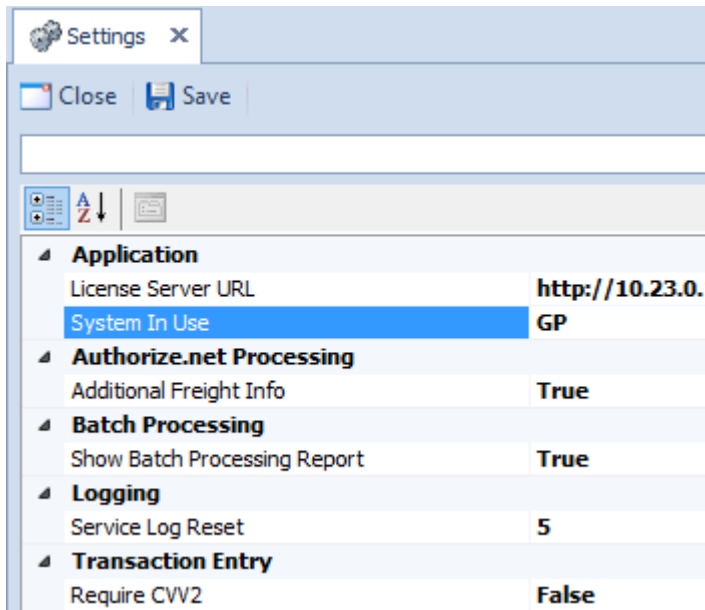
CardControl now has the ability to add customers to its database through the user interface.

Settings

Click the **Actions** dropdown and select Settings.

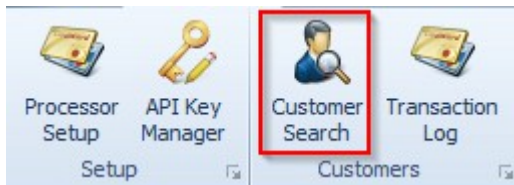


The *System In Use* setting is set to GP by default. If changed, press **Save** and logoff to apply the changes.

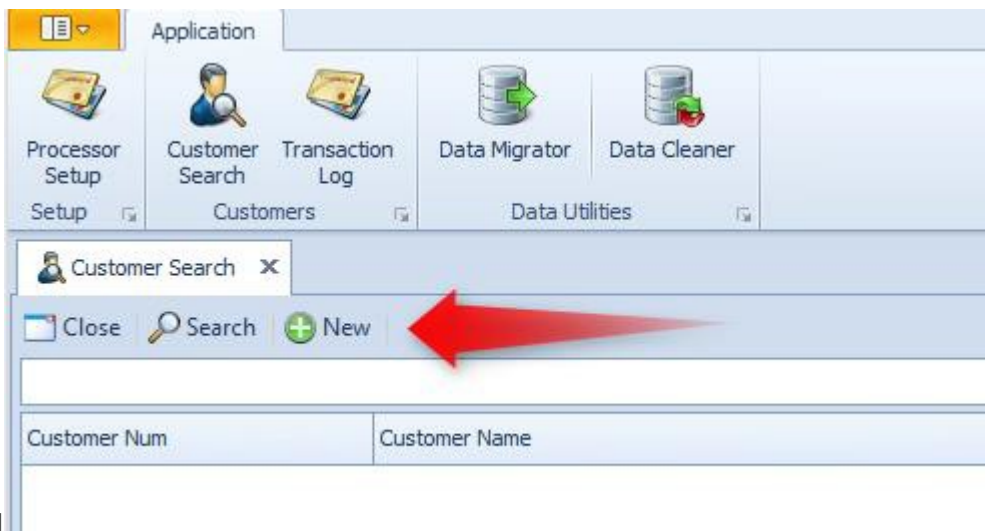


Usage

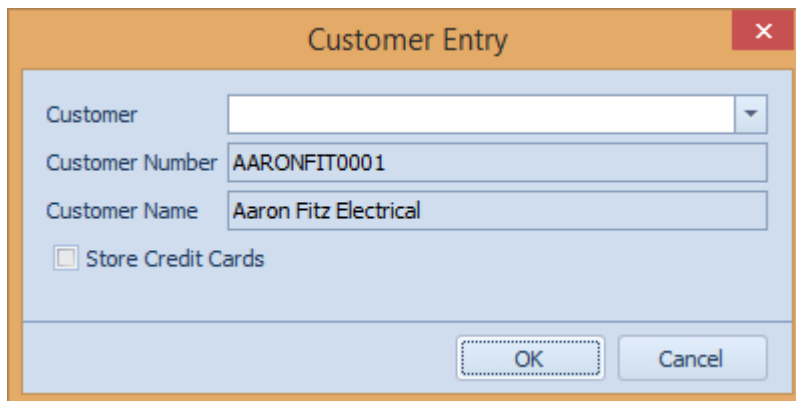
1. Click **Customer Search** to open the Customer Search Tab.



2. To add a new customer to the CardControl database, click the **New** button on the tab.



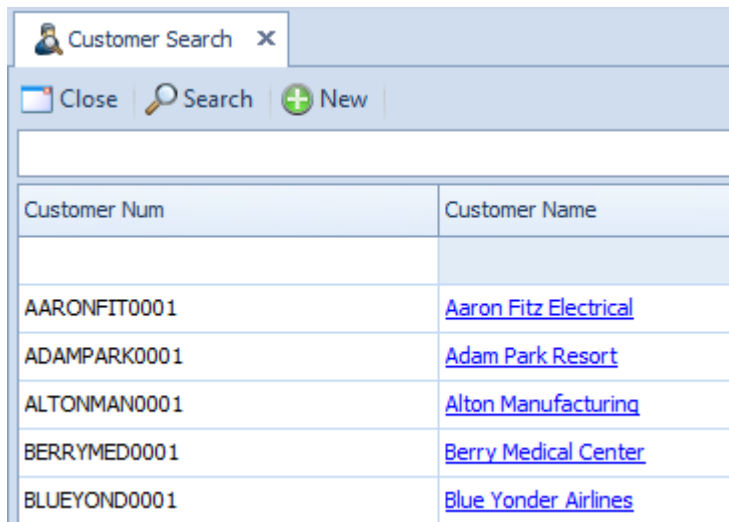
The Customer Entry window will open.



The image shows a 'Customer Entry' dialog box with the following fields and controls:

- Customer:** A dropdown menu.
- Customer Number:** A text field containing 'AARONFIT0001'.
- Customer Name:** A text field containing 'Aaron Fitz Electrical'.
- Store Credit Cards:** A checkbox that is currently unchecked.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

3. Use the **Customer** dropdown menu and select any customer that already exists on the database. Both the customer number and customer name will be auto populated.
4. To store credit cards for the entered customer, check the **Store Credit Cards** check box.
5. Click **OK** and a new customer will be created in the CardControl database. The search is automatically run upon closing the window to verify that the customer is now in the database.



The image shows a 'Customer Search' window with a search bar and a table of results. The window has a title bar 'Customer Search' and buttons for 'Close', 'Search', and 'New'.

| Customer Num | Customer Name |
|--------------|---------------------------------------|
| AARONFIT0001 | Aaron Fitz Electrical |
| ADAMPARK0001 | Adam Park Resort |
| ALTONMAN0001 | Alton Manufacturing |
| BERRYMED0001 | Berry Medical Center |
| BLUEYOND0001 | Blue Yonder Airlines |