



## 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](#).

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### 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.

Settings X

Close Save

Application

License Server URL	http://10.23.0.
System In Use	GP

Authorize.net Processing

Additional Freight Info	True
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Batch Processing

Show Batch Processing Report	True
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Logging

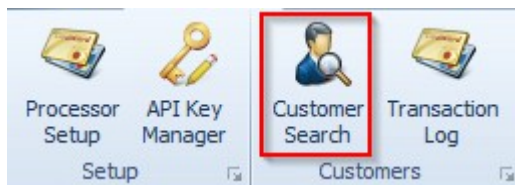
Service Log Reset	5
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Transaction Entry

Require CVV2	False
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## 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.

Application

Processor Setup Customer Search Transaction Log Data Migrator Data Cleaner

Setup Customers Data Utilities

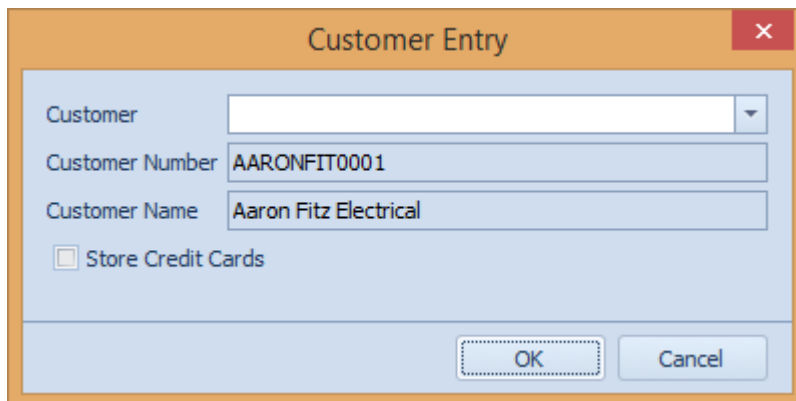
Customer Search X

Close Search + New

Customer Num Customer Name

The screenshot shows the 'Customer Search' window. The 'New' button, represented by a green plus sign, is highlighted with a large red arrow. The window has a title bar 'Customer Search X' and a toolbar with 'Close', 'Search', and 'New' buttons. Below the toolbar is a table with two columns: 'Customer Num' and 'Customer Name'.

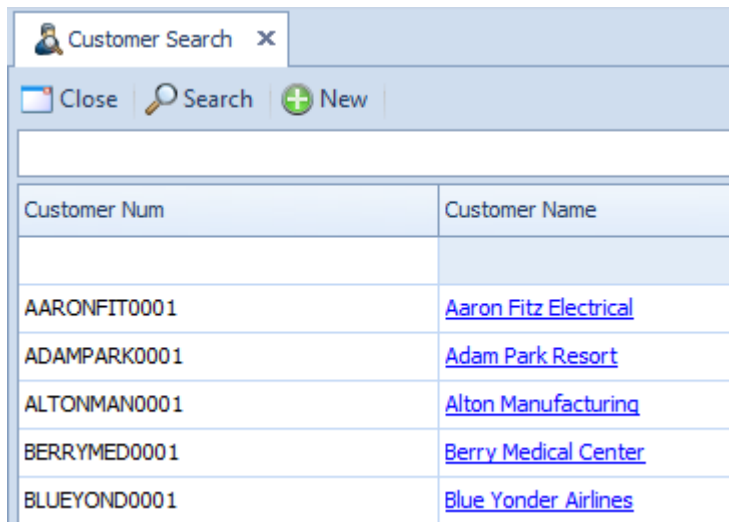
The Customer Entry window will open.



A dialog box titled "Customer Entry" with a close button (X) in the top right corner. It contains 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.



A window titled "Customer Search" with a close button (X) in the top right corner. It features a toolbar with "Close", "Search" (magnifying glass icon), and "New" (+ icon) buttons. Below the toolbar is a table with two columns: "Customer Num" and "Customer Name".

Customer Num	Customer Name
AARONFIT0001	<a href="#">Aaron Fitz Electrical</a>
ADAMPARK0001	<a href="#">Adam Park Resort</a>
ALTONMAN0001	<a href="#">Alton Manufacturing</a>
BERRYMED0001	<a href="#">Berry Medical Center</a>
BLUEYOND0001	<a href="#">Blue Yonder Airlines</a>