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Connecting AR and CRM Notes

Megan De Freitas - 2024-11-22 - [Sales](#)

Overview

The SalesPad Customer Card allows users to store notes on both the CRM tab and the A/R tab. With proper security, A/R notes can appear on both tabs.

Note: Users who have purchased the SalesPad GP Outlook Add-in may also store customer emails as notes on the CRM and A/R tabs. Please refer to the SalesPad GP Outlook Add-in document for instructions.

Security

- To see and edit CRM Notes, *Customer CRM* and *CRM Note Entry* must be enabled in the Security Editor.
- To see and edit A/R Notes, *Customer A/R*, which controls the A/R tab, must be enabled in the Security Editor.

Customer CRM > Show AR Notes:

If True, and if A/R is an option in the *Note Type List** (see Settings below), notes of the A/R type entered on the CRM tab will appear on both the CRM Contact Log and the A/R tab notes.

If False, notes of the A/R type entered on the CRM tab will appear on the A/R tab notes, but will only appear on the CRM Contact Log until it is refreshed.

Settings

*Customer Notes > Note Type List:

The note types entered here (ex: CRM, A/R) will appear as Type options when entering notes on the CRM Contact Log (Customer CRM Note Entry) on the Customer Card

The screenshot displays the SalesPad Customer Card for 'AARONFIT0001'. The 'Customer Properties' section includes fields for Customer Name (Aaron Fitz Electrical), Cust Class (USA-ILMO-T1), Price Level (RETAIL), Pay Terms (NET 30), Sales Rep (West, Paul), Sales Terr (TERRITORY 1), and Currency (Z-US\$). The 'Primary Address Information' section shows contact details for Bob Fitz. The 'Open Sales Documents' table lists various documents with columns for Type, Doc#, Doc D..., Batch, PO, and Tr. The 'Customer CRM Note Entry' dialog box is open, showing a text area for the note and a dropdown menu for the note type, with 'A/R' selected. The background also shows a 'Tasks' section with a list of tasks and their completion status.

For more information on the different Note types, refer to the following SalesPad documents:

Customer Card

CRM Tasks and Notes