Creating a New Customer

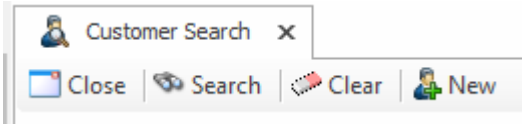
Cavallo Support - 2024-12-03 - Sales

Overview

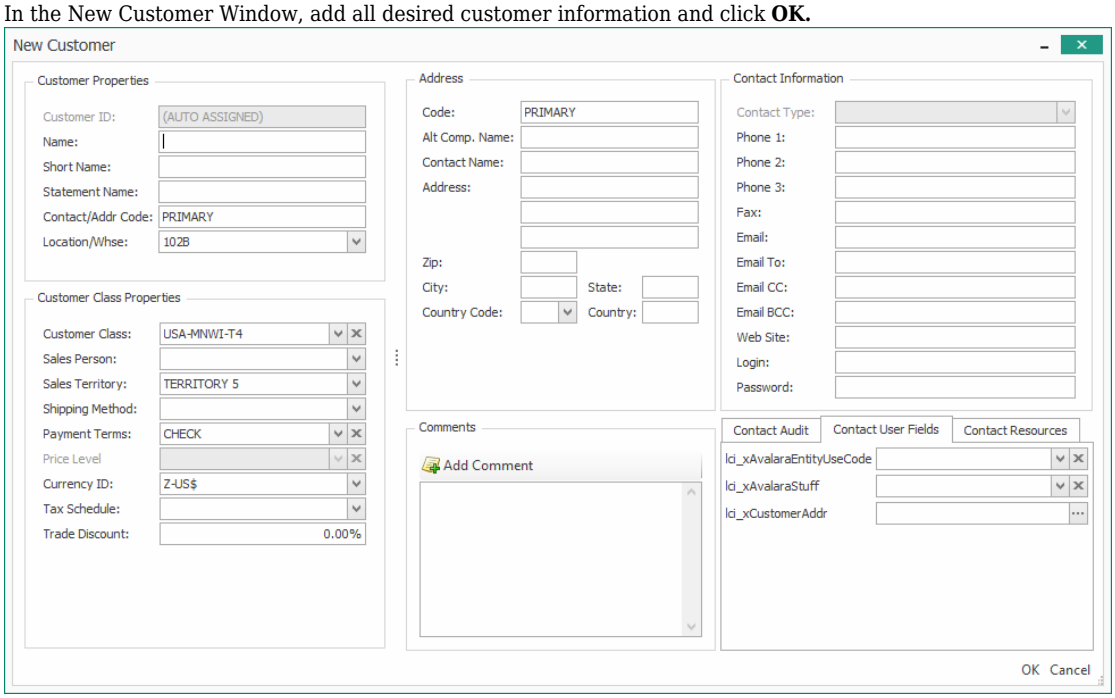
New customers can be created in SalesPad through the New Customer screen, accessed from the Customer Search module. (Customer Search > New).

Usage

From the Customer Search Screen, click **New**.



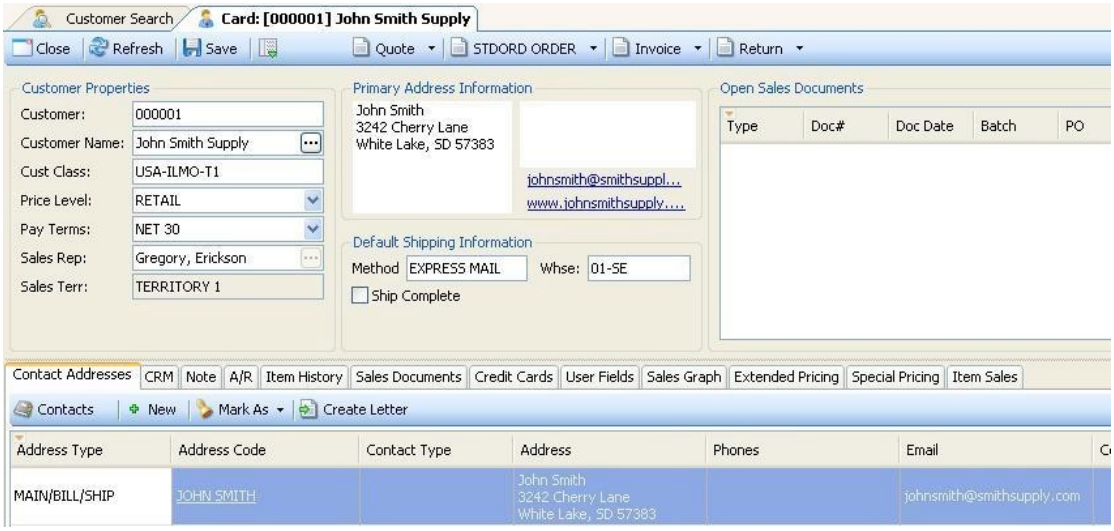
In the New Customer Window, add all desired customer information and click **OK.**



If security is configured (under the *New Customer* security setting – refer to the SalesPad Security Settings article for more information), the Customer ID can be automatically assigned and certain options can be set by default.

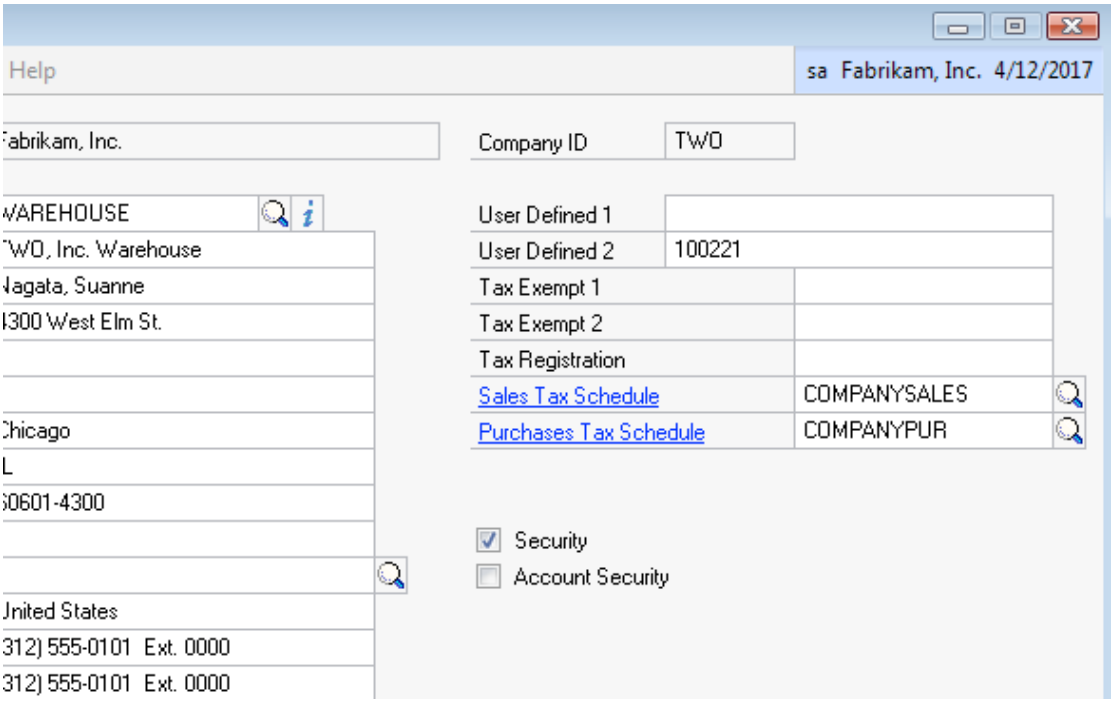
Note: When a class is initially set on a customer card, the associated class defaults will be set in GP. Future changes made to a customer class in SalesPad will NOT override the existing customer class settings in GP.

The customer's contact information will be visible in the Contact Addresses tab of the customer card:



To add additional contacts on the same Customer Card, click **New** on the Contact Addresses tab.

Note: SalesPad can auto-create the customer ID and customer number when a new customer is created (Dynamics GP cannot auto-assign new customer numbers). To enable this, set the sub-setting *Auto Assign Customer ID* to **True**. The auto number value will be pulled from User Defined 2 in the Dynamics GP Company Card:



Security

Customer Search > *Can Create Customers* - Allows a user to create a new customer. Defaults to 'False'.

New Customer - Grants access to the New Customer screen from the Customer Search module.