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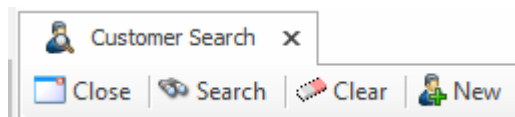
Creating a New Customer

Megan De Freitas - 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**.

The 'New Customer' window is a multi-tabbed form. The 'Customer Properties' tab is active, showing fields for Customer ID (set to 'AUTO ASSIGNED'), Name, Short Name, Statement Name, Contact/Addr Code (set to 'PRIMARY'), and Location/Whse (set to '102B'). Below these are 'Customer Class Properties' with dropdowns for Customer Class (USA-MINWI-T4), Sales Person, Sales Territory (TERRITORY 5), Shipping Method, Payment Terms (CHECK), Price Level, Currency ID (Z-US\$), Tax Schedule, and Trade Discount (0.00%). The 'Address' tab shows fields for Code (PRIMARY), Alt Comp. Name, Contact Name, Address, Zip, City, State, and Country Code. The 'Contact Information' tab shows fields for Contact Type, Phone 1-3, Fax, Email, Email To, Email CC, Email BCC, Web Site, Login, and Password. The 'Comments' tab has an 'Add Comment' button and a text area. The 'Contact Audit' tab shows fields for Id_xAvalaraEntityUseCode, Id_xAvalaraStuff, and Id_xCustomerAddr. The window has 'OK' and 'Cancel' buttons at the bottom right.

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:

Customer Search Card: [000001] John Smith Supply

Close Refresh Save Quote STDORD ORDER Invoice Return

Customer Properties

Customer: 000001

Customer Name: John Smith Supply

Cust Class: USA-ILMO-T1

Price Level: RETAIL

Pay Terms: NET 30

Sales Rep: Gregory, Erickson

Sales Terr: TERRITORY 1

Primary Address Information

John Smith
3242 Cherry Lane
White Lake, SD 57383

johnsmith@smithsupply...
www.johnsmithsupply....

Open Sales Documents

Type	Doc#	Doc Date	Batch	PO
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Default Shipping Information

Method EXPRESS MAIL Whse: 01-SE

☐ Ship Complete

Contact Addresses CRM Note A/R Item History Sales Documents Credit Cards User Fields Sales Graph Extended Pricing Special Pricing Item Sales

Contacts New Mark As Create Letter

Address Type	Address Code	Contact Type	Address	Phones	Email
MAIN/BILL/SHIP	JOHN SMITH		John Smith 3242 Cherry Lane White Lake, SD 57383		johnsmith@smithsupply.com

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:

Help sa Fabrikam, Inc. 4/12/2017

Fabrikam, Inc. Company ID TWO

WAREHOUSE

TWO, Inc. Warehouse

Jagata, Suanne

1300 West Elm St.

Chicago

L

30601-4300

United States

312) 555-0101 Ext. 0000

312) 555-0101 Ext. 0000

User Defined 1

User Defined 2 100221

Tax Exempt 1

Tax Exempt 2

Tax Registration

Sales Tax Schedule COMPANYSALES

Purchases Tax Schedule COMPANYPUR

☒ Security

☐ Account Security

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.