



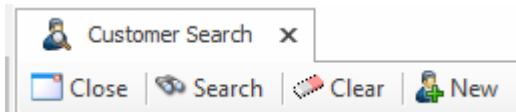
## Creating a New Customer

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 complex form with multiple sections:

- Customer Properties:** 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').
- Customer Class Properties:** Fields for Customer Class (set to 'USA-MNWI-T4'), Sales Person, Sales Territory (set to 'TERRITORY 5'), Shipping Method, Payment Terms (set to 'CHECK'), Price Level, Currency ID (set to 'Z-US\$'), Tax Schedule, and Trade Discount (set to '0.00%').
- Address:** Fields for Code (set to 'PRIMARY'), Alt Comp. Name, Contact Name, Address, Zip, City, State, Country Code, and Country.
- Contact Information:** Fields for Contact Type, Phone 1, Phone 2, Phone 3, Fax, Email, Email To, Email CC, Email BCC, Web Site, Login, and Password.
- Comments:** A section with an 'Add Comment' button and a text area.
- Contact Audit:** Fields for Id\_xAvalaraEntityUseCode, Id\_xAvalaraStuff, and Id\_xCustomerAddr.

The window has an 'OK' button and a 'Cancel' button 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...

**Default Shipping Information**

Method: EXPRESS MAIL Whse: 01-SE  
☐ Ship Complete

**Open Sales Documents**

Type	Doc#	Doc Date	Batch	PO
------	------	----------	-------	----

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  
 Magata, Suanne  
 1300 West Elm St.  
 Chicago  
 IL  
 60601-4300  
 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.