



## Custom Customer Card Banner Alerts

Megan De Freitas - 2024-11-25 - Sales

### Overview

Users may use SQL to add a customized banner to the Customer Card to alert the user of a particular characteristic of the customer, defined in a user defined field. For example, the banner can be used to indicate the customer's discount percentage, or to indicate that a customer is assigned to a particular dealer. A yellow banner will appear across the top of a Customer Card if the user field called on in the SQL script is populated:

The screenshot shows the SalesPad Customer Card interface for 'Johnson, Kimberly' (ID: JOHNSONK0001). A yellow banner at the top reads 'This customer is assigned to Priority Dealer'. The card is divided into several sections:

- Customer Properties:** Fields for Customer (JOHNSONK0001), Customer Name (Johnson, Kimberly), Cust Class (USA-ILMO-T1), Price Level (RETAIL), Pay Terms (NET 30), Sales Rep, Sales Terr (TERRITORY 1), and Currency (Z-US\$).
- Primary Address Information:** Address: Dr. Kimberly Johnson, M, 5678 S. 42nd Ave., Rockford, IL 61125-6149. Phone: P1:(815) 555-0150, FX:(815) 555-0150. Email: [joe@salespad.net](mailto:joe@salespad.net).
- Default Shipping Information:** Method: GROUND, Whse: (empty). Checkboxes for Ship Complete and On Hold.

At the bottom, there are tabs for Contact Addresses, CRM, Note, A/R, Item History, Sales Documents, Credit Cards, User Fields, and Sales. Below the tabs, the Dealer Name is set to Priority Dealer.

**Note:** Completing a database update will clear the customizations made to the views. You must reapply changes to the views after any SalesPad database updates.

### Use

You will need to modify the (spvCustomer\_base) and change the line ( [Message] = ", ). As an example, we are going to look at a customer and see if they have a discount set up in the customer user field. So our spvCustomer\_base has been changed to this:

```
,[Message] = CASE
WHEN (Len(x.[xCustomerDiscount]) > 0)
THEN 'This customer discount is ' + x.[xCustomerDiscount]
ELSE ''
```

END

We then also had to join to the spxCustomer table to pull this field, so we added this line:

```
left join spxCustomer as x (nolock) on  
x.Customer_Num=RM00101.CUSTNMBR
```

When added to the view from v.4.6.3.4:

```
USE [TW0]  
GO  
/***** Object: View [dbo].[spvCustomer_base] Script Date: 9/20/2018  
3:57:53 PM *****/  
SET ANSI_NULLS ON  
GO  
SET QUOTED_IDENTIFIER ON  
GO  
/* View -spvCustomer_base */  
ALTER view [dbo].[spvCustomer_base]  
AS  
SELECT [Customer_Num] = RM00101.CUSTNMBR  
,[Customer_Name] = CUSTNAME  
,[Customer_Class] = CUSTCLAS  
,[Corporate_Customer_Num] = CAST(CPRCSTNM AS VARCHAR(25))  
,[Short_Name] = SHRTNAME  
,[Statement_Name] = STMTNAME  
,[Primary_Addr_Code] = UPPER(RM00101.ADRSCODE)  
,[Primary_Bill_To_Addr_Code] = UPPER(PRBTADCD)  
,[Primary_Ship_To_Addr_Code] = UPPER(PRSTADCD)  
,[Statement_To_Addr_Code] = UPPER(STADDRCD)  
,[Sales_Person_ID] = SLPRSNIID  
,[Sales_Territory] = SALSTERR  
,[Payment_Terms] = upper(PYMTRMID)  
,[Shipping_Method] = SHIPMTHD  
,[Price_Level] = isnull(PRCLEVEL, '')  
,[User_Def_1] = USERDEF1  
,[User_Def_2] = USERDEF2  
,[Tax_Exempt_1] = TAXEXMT1  
,[Tax_Exempt_2] = TAXEXMT2  
,[Tax_Registration_Num] = TXRGNNUM  
,[Comment_1] = COMMENT1  
,[Comment_2] = COMMENT2  
,[IntegrationSource] = INTEGRATIONSOURCE  
,[Inactive] = cast(INACTIVE AS BIT)  
,[On_Hold] = cast(HOLD AS BIT)
```

```

,[Note] = ISNULL(TXTFIELD, '')
,[Currency_ID] = isnull(isnull(custCurr.CURRENCYID, funcCurr.CURRENCYID),
'')
,[Currency_Dec] = isnull(isnull(custCurr.DECPLCUR,
funcCurr.DECPLCUR), 3) -1
,[Last_Aged] = LASTAGED
,[Balance] = CUSTBLNC
,[Unapplied_Amount] = (
SELECT sum(curtrxam)
FROM RM20101 AS ar(NOLOCK)
WHERE ar.CUSTNMBR = RM00101.CUSTNMBR
AND RMDTYPAL = 9
AND VOIDSTTS = 0
AND curtrxam > 0
)
,[Customer_Credit_Limit] = CRLMTAMT
,[Credit_Limit_Type] = CRLMTTYP
,[Finance_Charge_Type] = FNCHATYP
,[Finance_Charge_Amt] = FINCHDLR
,[Finance_Charge_Pct] = FNCHPCNT
,[Min_Pmt_Type] = MINPYTYP
,[Min_Pmt_Amt] = MINPYDLR
,[Min_Pmt_Pct] = MINPYPCT
,[Balance_Type] = BALNCTYP
,[Max_Writeoff_Type] = MXWOFTYP
,[Max_Writeoff_Amt] = MXWROFAM
,[Last_Pay_Date] = LASTPYDT
,[Last_Pay_Amt] = LPYMTAMT
,[First_Invoice_Date] = cs.FRSTINDT
,[Last_Invoice_Date] = LSTTRXDT
,[Last_Invoice_Amt] = LSTTRXAM
,[Last Stmt_Date] = LASTSTDY
,[Last Stmt_Amt] = LSTSTAMT
,[Life_Avg_Days] = AVDTPLIF
,[Year_Avg_Days] = AVGDTPYR
,[Total_Amt_NSF_Checks_YTD] = cast(TNSFCYTD AS NUMERIC(19, 5))
,[Num_NSF_Checks_YTD] = cast(NONSFYTD AS INT)
,[Tax_Schedule] = TAXSCHID
,[Ship_Complete] = Cast(SHIPCOMPLETE AS BIT)
,[Stmt_Email_To] = dbo.spfGetCustomerEmail([RM00101].CUSTNMBR, 1)
,[Stmt_Email_CC] = dbo.spfGetCustomerEmail([RM00101].CUSTNMBR, 2)
,[Stmt_Email_BCC] = dbo.spfGetCustomerEmail([RM00101].CUSTNMBR, 3)
,[Email_To] = email.EmailToAddress

```

```

,[Email_CC] = email.EmailCcAddress
,[Email_BCC] = email.EmailBccAddress
,[Message] = CASE
WHEN (Len(x.[xCustomerDiscount]) > 0)
THEN 'This customer discount is ' + x.[xCustomerDiscount]
ELSE ''
END
,--Used for FB 2388 ORD011021 -R Jorgenson Banner Custom
USERDEF1
,USERDEF2
,[Trade_Discount] = (cast(CUSTDISC AS NUMERIC(19, 5)) / 100)
,[Master_Distributor] = ISNULL(c.[Master_Distributor], '')
,[Method_Of_Billing] = ISNULL(c.[Method_Of_Billing], 0)
,[Send_Email_Statements] = ISNULL(Send_Email_Statements, 0)
,[Created_On] = [RM00101].CREATDDT
,[Changed_On] = [RM00101].MODIFDT
,[Promotions_Applied_Customer]
,[DEX_ROW_TS] = [RM00101].DEX_ROW_TS
,[On_Order_Amount] = cs.ONORDAMT
,[Language_ID] = USERLANG
,[Combine_Split_Docs] = c.Combine_Split_Docs
FROM RM00101(NOLock)
LEFT JOIN spCustomer(NOLock) AS c ON c.[Customer_Num] =
RM00101.CUSTNMBR
LEFT JOIN SY03900(NOLock) ON SY03900.NOTEINDX = RM00101.NOTEINDX
LEFT JOIN RM00103 AS cs(NOLock) ON cs.CUSTNMBR = RM00101.CUSTNMBR
LEFT JOIN DYNAMICS16..MC40200 AS custCurr(NOLock) ON
custCurr.CURNCYID = RM00101.CURNCYID
LEFT JOIN MC40000 AS currSetup(NOLock) ON 1 = 1
LEFT JOIN DYNAMICS16..MC40200 AS funcCurr(NOLock) ON
funcCurr.CURNCYID = currSetup.FUNLCURR
LEFT JOIN SY01200 AS email(NOLock) ON RM00101.CUSTNMBR =
email.Master_ID
AND email.ADRSCODE = RM00101.ADRSCODE
AND email.Master_Type = 'CUS'
LEFT JOIN spxCustomer AS x(NOLock) ON x.Customer_Num =
RM00101.CUSTNMBR

GO

```

After updating the view, when we log in and open a Customer Card that has a customer discount applied to it, the custom banner will appear:

Customer Search | Security Editor | Settings | Card: [AARONFIT0001] Aaron Fitz Electrical |

Close | Refresh | Save | Dynamics GP | STDQTE QUOTE | STDORD ORDER | Invoice

**This customer discount is 10%**

Customer Properties		Primary Address Information		Open Sales Documents	
Customer:	AARONFIT0001	Bob Fitz	P1:(425) 555-0101	Type	Doc#
Customer Name:	Aaron Fitz Electrical	One Microsoft Way	FX:(312) 555-0101	QUOTE	EDM-
Cust Class:	USA-ILMO-T1	Redmond, WA 98052-63	<a href="mailto:jorge@salespad.net">jorge@salespad.net</a>	ORDER	<a href="#">ORDM</a>
Price Level:	RETAIL			ORDER	<a href="#">ORDM</a>
Pay Terms:	NET 30	Default Shipping Information		ORDER	<a href="#">ORDS</a>
Sales Rep:	West, Paul	Method	LOCAL DELIVERY	ORDER	<a href="#">ORDS</a>
Sales Terr:		Whse:		ORDER	<a href="#">ORDS</a>
Discounts:	10%	<input type="checkbox"/> Ship Complete		ORDER	<a href="#">ORDS</a>
Currency:	USD	<input type="checkbox"/> On Hold		ORDER	<a href="#">ORDS</a>
				ORDER	<a href="#">ORDS</a>