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# Customer Card

Megan De Freitas - 2025-07-09 - Sales

## Overview

The SalesPad Customer card provides a complete view of information regarding the customer and the customer's sales transactions, including addresses/contacts, open and historical sales documents, and CRM data. Sales documents can also be created from the Customer card.

## Usage

Access a Customer card by finding and selecting a customer in Customer Search. New customers are also created via Customer Search. Refer to the <u>Customer Search</u> and <u>Creating a New Customer</u> documents for further instruction.

With proper configuration (Auto Popup Customer Note under Customer Inquiry), the Customer Notes screen may pop up when users first access the customer card. Customer Notes display any important notes regarding the customer that have been added under the Notes tab. Click **OK** to exit the popup:



## Customer Card Header

## Sales Documents

To create a new sales document for the current customer, select an available order type from the header buttons. For example, click the dropdown arrow and select STDORD ORDER to create a standard order for the customer:



The sales document will open in a new tab.

& Customer Sea	arch 🗙 🌡 Customer: [AARON	FIT0001] Aaron Fitz Elect	trical 🗙 🗋 (ORD	ER) X					
📑 Close 🛛 🛃 Sa	ive 🗟 Print 📳 🛛 样 De	lete   🗅 Copy   🛃 A	llocate 🔞 Unalloca	te 🗼 Dyr	namics GP				🔷 Release
Document Proper	ties	Shipping Ad	ldress	Ad	ditional Propertie	25	I	otals - GM: [\$0	.00] [0.00%]^
Document #:	ORDER (STDORD	) Aaron Fitz	Electrical	^ Ba	atch/Q:	NEW ORDER	2	Misc Charge:	0.0
Customer #:	AARONF. ··· Aaron Fitz Elec	trical Grand rap	ids, MI 49888	Pr	rice Level:	RETAIL	~	Discount:	0.0
Cust PO:	Sales Rep: PA	A 🗸						Discount %	0.00%
Reg Ship:	11/28 V Sales Terr:	$\sim$			N	o Holds		reight:	0.0
Ship Method:	LO V Pay Terms: NE	×		~				Tax:	0.0
Whse:	W V Doc Date: 11	L/28 V Ship Co	omplete					Total:	0.0
Currency:	Z V Created By: sa	1						Payment:	0.0
Quote Exp. Date	::	$\sim$							
4	Combine Solit	Doco							~
Line Items No	tes Addresses Holds Use	er Fields Audit Rel	ated Documents P	urchases	Quick Report	FedEx Quote	Email Audit	Assemblies	Tracking Num
🙀 New 🙀 Dele	ete 📫 Insert 🛄 🛛 Ite	m Number	UOfM Schedule	ard C	Cost Price Level			Available	Onhand
Ttem	Description	Qty Qty Allo	cated Qty Fulfille	ed Qty	BO Invoice	Qty Price	Cost	UOfM Whse	Ext Price

**Note**: If *Fast Ship To Ordering Enabled* is enabled in Modules > Settings, users can select a contact from the Contact Addresses tab to be automatically used for shipping on the new sales document (the highlighted contact will be used). If enabled, the following message will appear on the Contact Addresses tab:

Contact Addresses	CRM	Note	A/R	Item History	Sales Documents	Credit	Cards	PayFabric Transactions	PayFabr	ic Wallet
Contacts	New 📕	Delete	🏷 Ma	ırk As 👻 🛃 Cr	eate Letter		[Fast	Ship To Ordering Enabled	I: NEW ]	

#### Plugins

Click the **Actions** dropdown to display available plugins. Currently, the Customer card has two available plugins: National Account and Run Script. If the open Customer card is a child of a parent company, SalesPad Desktop will display parent company information when National Account is selected. Parent/child relationships are created in Microsoft Dynamics GP.

## Other Header Buttons

Dynamics GP button: Opens the current customer in Dynamics GP.

Save: Saves any changes on the Customer card.

Refresh: Refreshes the information, including newly added sales documents.

Close: Closes the current Customer card.

#### **Customer Properties**

Customer Properties displays customer information such as name, class, sales rep, and

available discounts. With proper security, these fields may be changed/edited. Depending on security (Customer Overview sub-settings), hovering over the Customer field will display a Sales Summary hint over the Customer Name field that can include the customer' s yearly revenue, cost, percent margin, freight cost and freight revenue.

a Customer Sea	rch 🗙 🌡 Cu	ustomer: [AARONF	TT0001] Aaron Fitz B	Electrical X					
📑 Close 🛛 🍣 Re	fresh 🛛 🛃 Save	🍪 Print 🛛 🛄	🟄 Dynamics GP		STDQTE QUOTE	🕶 📄 ST	DORD ORDER	- 🗎 STDINV	INVOIC
- Customer Propert	ies		– Primary Address In	formation		Оре	n Sales Docume	nts	
Customer:	AARONFIT0001	2	One Microsoft Wa Grand rapids, MI	iy 49888		^ Ty	pe i	Doc#	Doc Da
Customer Name:	Aaron Fitz Electri	ig				00	DED (	000673423	11/12/
Cust Class:	USA-ILMO-T1	Sales Summa	ry						1
Price Level:	RETAIL	Date		Revenue	Cost	Margin%	Freight Re	ev Freight C	ost o
Bay Torma	NET 20	2018 (01/01	-11/28)	\$1,851.65	\$1,347.10	27.25	\$0.0	00 \$0	0.00
Fay terms:	INET 30	2017	\$	10,042.10	\$4,593.43	54.26	\$0.0	00 \$0	0.00
Sales Rep:	West, Paul	2016	\$	13,423.75	\$6,935.10	48.34	\$0.0	00 \$0	0.00 2
		2015		\$2,559.90	\$2,400.98	6.21	\$0.0	00 \$C	0.00
Sales Terr:		L	Crand rando ML /	1000					۴

**Note:** With proper security, users can select a new Customer Class for a customer. When a class is initially set on a Customer card (during new customer setup), the associated class defaults will be set in Dynamics GP. Future changes made to a Customer Class in SalesPad Desktop will NOT override the existing Customer Class settings in Dyamics GP – changes will not roll down to change the GL accounts associated with this. Creating a new customer will still add the correct GL information.

#### **Primary Address Information**

Displays address, phone number, and website for the customer's primary contact (set up on the Contact Addresses tab).

#### **Default Shipping Information**

Displays default Shipping Method and warehouse for the customer, as well as Ship Complete preference and On Hold status.

#### **Open Sales Documents**

Displays a list of all open sales documents for the customer. Click on a document number to open the document.

#### **Contact Addresses Tab**

Contact Addresses CRM Not	e A/R Item History Sale	es Documents Credit Cards P	PayFabric Transactions	PayFabric Wallet Use	er Fields Sales Graph	Extended Pricing (	•			
Contacts • New # Delet	te 🛛 🏷 Mark As 👻 🛃 Create I	etter [Fast Shi	p To Ordering Enabled	: NEW ]						
Address Type	Address Line 1	Address Code	Email		Comment					
MAIN/BILL TO/SHIP TO/STATEMENT	One Microsoft Way	NEW								
	2513 Stockwood Dr. NE	PRIMARY								
	11403 45 St. South	WAREHOUSE								

All contacts for the current customer are displayed and set up on the Contact Addresses tab.

**Note:** User defined fields on the Customer Addr business objects can be added as columns on the Contacts grid. Refer to the <u>SalesPad User Defined Fields</u> document for more information.

To set a contact as Primary, select the contact and click the **Mark As** dropdown. Select the primary address type:



The selection will display under the Address Type column.

The Create Letter button allows users to automatically populate a Microsoft Word document with the selected contact information from the Contact Addresses tab. First, create a Word document with the appropriate merge fields (for example, < CustomerAddr.Address> populates with the current highlighted address on the tab; see <u>this documentation</u> for examples of Merge Fields). Select a contact, click **Create Letter** and open the document from the dialog box.

Contact Addresses	CRM	Note	te A/R Item History			Sales Docur	nents	Cre
😂 Contacts 🛛 🕈 I	New 📕	Delet	e   🏷 Ma	ark As 👻	🛃 Cr	eate Letter		
Address Type			Address Li	ne 1		Addres	ss Code	
MAIN/BILL TO/SHIP TO	O/STATE	MENT	One Micros	soft Way		NEW		
			2513 Stoc	wood Dr	. NE	PRIMA	RY	
			11403 45 9	St. South		WARE	HOUSE	

The merge

fields will automatically populate with contact information. The opened document will be read-only until it is saved as a new file name.

Click **New** to add a new contact. A Contact tab will appear, with default information prefilled:

a Customer Sear	ch 🗙 🌡 Customer: [AARON	FIT0001] Aaron Fi	itz Electrical 🗙		Contact: (New) ×				
📑 Close 🛛 🛃 Sav	e 🧼 Clear								
Customer									
Customer ID:	AARONFIT0001		Customer Name:	Aa	ron Fitz Electrical				
Address					Contact Information	n	Other Address Inf	fo	
Code:				1	Contact Type:	×	Warehouse:		
Alt Comp. Name:	Aaron Fitz Electrical			1	Phone 1:		Sales Rep:	West, Paul	~
Contact Name:					Phone 2:		Sales Territory:		$\sim$
Address:	One Microsoft Way				Phone 3:		Ship Method:	LOCAL DELIVERY	~
					Fax:		Tax Code:	USAUSSTCITY+6*	~
					Email:		Ups Zone:		~
Zip:	49888				Email To:		File Location 1:		
City:	Grand rapids	State: MI			Email CC:		File Location 2:		
Country Code:	US	<ul> <li>Country: Un</li> </ul>	nited States		Email BCC:		Do Not Mail		
					Web Site:		Do Not Email		
					Login:		Do Not Fax		
					Password:				

Complete the contact' s information and change any defaults if necessary. Any custom user fields for the Customer Addr business object (refer to the <u>SalesPad User Defined Fields</u> <u>document</u>) will appear under Contact User Fields. Click **Save** to add the contact.

Double-clicking a contact or clicking on a contact's address code from the Contact Addresses tab will open the Contact window.

## CRM Tab

The CRM tab allows tasks to be scheduled and customer interaction notes to be recorded. Refer to the <u>SalesPad CRM Tasks and Notes</u> documentation for setup and usage information.

## Note Tab

Notes and comments related to the current customer can be stored on the Note tab. Notes may be shown as a popup when first accessing the Customer Card (Modules > Settings > Auto Popup Customer Notes).

With proper security, users can type notes in the top section and click **Add to Notes** to add date/time stamped notes and/or edit existing notes, or add free-form notes in the lower section. Comment Lines can be added on the right (these are brief and will not display in the Customer Notes popup).

Be sure to save any changes using the Save button on the Customer card header.

[	Contact Addresses CRM	Note	A/R	Item History	Sales Documents	Credit Cards	PayFa	abric	Transactions	PayFabric Wallet	User Fields	Sales Graph	Extended Pricing	( ← +
	Add to Notes 🛛 🖂	pend a Bl	ank Line	2										
	Notes				Search:		Search		Comment Line	is				
				^	Note Shortcut	Note Text			Comment 1:					
				$\sim$	Multi Location	This customer	has		Comment 2:					
	[sa] 11/28/2018 11:54:05 A	M Custom	er since 2	2012 ^				;						
	Favorite Items: HD-20, 100	LG												
				$\sim$										

**Note**: Notes on the Customer card Notes tab are limited to 7,799 characters total. Entered notes longer than 7,799 characters will be trimmed (there is currently no notice given) and additional notes entered will not save.

# A/R Tab

The A/R tab displays information on the customer's past and current Accounts Receivable, including current total balance due, average number of days to pay, aging period, and A/R-related interaction notes.

Contact Addresses	CRM	lote	A/R	Item History	Sales Documents	Credit Cards	PayFabric Transactions	PayFabric Wallet	User Fields S	Sales Graph	Exter	nded Pricing	€ ← →
Overview Notes	s Transa	iction E	intry										
A/R Measures				Customer	Aging		Contact		Options				^
	Averag	e Days	to Pay:	Period		Amount	Bill To: NEW		Balance Type:	Open Item	$\sim$		
Year To Date:			0	Current		-750.00	Add Contact Sele	ct Contact	Finance Charge:	Percent	$\sim$	1.50%	Ď
Life To Date:			0	31 - 60 0	Days	0.00	One Microsoft Way	÷	Minimum Payment	t: No Mini	$\sim$	0.00	2
	Date:	A	mount:	61 - 90 0	Jays	0.00	Grand rapids, MI 49888		Credit Limit:	Amount	$\sim$	35,000.00	2
First Invoice:	12/4/201	3		91 - 120	Days	0.00			Maximum Writeof	f: Maximum	$\sim$	25.00	3
Last Invoice:	9/24/201	3	50.00	121 - 15	0 Days	0.00							
Last Payment:	6/21/201	3	76.00	151 - 18	0 Days	0.00							
Last Statement:	2/15/201	7 25,	,613.13	181 and	Over	2,500.00							~

Customer Aging can be sorted by Period or Amount.

Click on **Balance** (Customer AR Detail security required) to view a list of any documents on which the customer owes a balance (click on a document number to view a specific document on the list).

With proper configuration, users can click **Add Contact** to add a new customer contact

from the A/R tab, (opens the Contact tab) or click **Select Contact** to choose an A/R contact (displayed on the tab) from all existing customer contacts:

Address Code	Address	Email
PRIMARY	Bob Fitz. One Microsoft Way Grand Rapids, MI 49506 P:(425) 555-0101 F:(312) 555-0101	robr@salespad.net
TIM	Tim H 11403 45 St. South Chicago, IL 49506 P:(312) 555-0102 F:(312) 555-0101	
WAREHOUSE	Mr. Bob Fitz 11403 45 St. South Chicago, IL 60603-0776 P:(312) 555-0102 F:(312) 555-0102	robr@salespad.net
WAREHOUSE2	11415 45 St. South Chicago, IL 98052-6399 P:(312) 555-0102 F:(312) 555-0101	matt@salespad.net

A/R notes display on the right side of the A/R tab. Click **New Note** to add a note, or doubleclick an existing note to edit it.

Click **Delete** to delete a note. A confirmation message will appear before the deletion is finalized.

# Item History Tab

The Item History tab displays a complete list of all items ordered by the customer. Click on an item number to open the item information in Inventory Lookup.

Contact Addresses	CRM Note	A/R	Item Histor	y Sales Doci	uments Cr	edit Cards	PayF	abric Transactions	PayFabric Wallet	User Fields	Sales Graph	Exter	nded Pricing	C -(	ŀ
🍣 Refresh 📑	Add One Time It	ems	<mark>-</mark> Add De	fault Items N	Aonths To Sh	now: 14	\$	nclude: Quote	es 🗌 Orders 🖌	Invoices F	Returns Sour	ce	✓ Open		v
Item Number	Item Description		Quantity	Unit Cost	Unit Pr	ice Doc Dat	e 🔺	Sales Doc Type	Sales Doc Num	Source	Customer	PO	Ship To City		
e 🛛 c	REC		-	-	-	-		REC	REC	a 🛛 c	RBC		RBC		^
<u>HD-20</u>	20 Gig Hard Drive		1	50.00	9.	00 2/12/20	18	INVOICE	ORDST2246	History			Chicago		
HD-20	20 Gig Hard Drive		1	50.00	9.	00 2/12/20	18	INVOICE	STDINV2264	History			Chicago		
CAP 100	Capacitor		1	0.02	9.	95 2/12/20	18	INVOICE	STDINV2264	History			Chicago		
WIRE-MCD-0001	Multi conductor wire	2	1	0.54	0.	35 3/6/201	8	INVOICE	ORDST2245	History			Chicago		
WIRE-MCD-0001	Multi conductor wire	2	1	0.54	0.	35 3/6/201	8	INVOICE	ORDST2245	History			Chicago		
HD-20	20 Gig Hard Drive		1	50.00	9.	00 3/8/201	8	INVOICE	STDINV2265	History			Chicago		
HD-20	20 Gig Hard Drive		1	50.00	9.	00 3/8/201	8	INVOICE	STDINV2266	History			Chicago	_	~

To modify the displayed history, select the number of Months to Show, desired Document Types, and click **Refresh** to update.

To display results in expandable/collapsible sections by document type, select Group by Doc Type and click **Refresh.** 

Click the +/- boxes to expand or collapse.

**Note**: The Add One Time Items and Add Default Items buttons on the Item History tab are available in versions 4 .1 and later, and the functionality is covered in <u>Customer One Time</u> <u>Items</u> documentation and <u>Customer Default Items</u> documentation.

#### Sales Documents Tab

The Sales Documents tab displays a complete list of all sales documents for the customer. This tab display works very similarly to the Item History tab.

Contact Addresse	es CRM Note	e A/R Item	History Sales Do	ocuments Credit	t Cards PayFabr	ic Transactions	PayFabric Wallet	User Fields Sa	ales Graph Exter	nded Pricing (	•
🍣 Refresh 🛛 🕅	Nonths To Show:	6 🗘 Includ	de: 🗸 Quotes	✓Orders ✓Ir	ivoices 🔽 Return	ns Source:	✓Open ✓Histor	y 🗌 Void Grou	p By:	~ ×	
Source	Sales Doc Type	Sales Doc Num	Doc Date 🔺	Prev Sales Doc	Customer PO N	Req. Ship Date	Actual Ship Date	Total	Master Num	Sales Batch	
a 🛛 c	BC	80C	-	e 🛛 c	RBC	-	-	-	-	REC	^
History	INVOICE	STDINV2279	6/21/2018	ORDST2358		6/21/2018	6/21/2018	75.00	539	sa	
History	QUOTE	QTEST 1050	6/27/2018			6/27/2018		75.00	544	NEW QUOTE	
History	ORDER	ORDST2374	7/6/2018		ELGEN 2	7/6/2018	7/6/2018	150.00	555	NEW ORDER	
History	ORDER	ORDST2376	7/9/2018			7/9/2018	7/9/2018	150.00	558	NEW ORDER	
History	ORDER	ORDST2376.1	7/9/2018	ORDST2376		7/9/2018	7/9/2018	75.00	558	NEW ORDER	
History	ORDER	ORDST2376.2	7/9/2018	ORDST2376		7/9/2018	7/9/2018	75.00	558	NEW ORDER	
History	ORDER	ORDST2377	7/10/2018			7/10/2018	7/10/2018	150.00	560	NEW ORDER	~

Click on a sales document number to open the sales document.

#### Credit Cards Tab (pre-4.1 versions only)

The Credit Cards tab displays a customer's credit card transaction history and the customer's credit cards stored in Dynamics GP and SalesPad Desktop credit card tables. Toggle between Transactions and Cards on this tab (security required).

Under Transactions, users can see a list of previous transactions, or start a new transaction on the customer's account.

To make a credit card payment or credit to the customer's account, click **Start New Transaction** and fill out the required information.

Change the Credit Card History display using Months to Show and Refresh. The Show Details check box will show or hide the messages in blue regarding each transaction.

Under Cards, users can view, edit or clear the GP Primary Card, or copy it to the SalesPad Credit Card file. Stored credit cards are listed on the right.

Transactions	Card Type:		~	Copy >>		🖶 Add Card 📙 Save Card	样 Delete Card 🕨 Set Default			
Carus	Card Number	XXXX-XXXX-XXXX-8007		Clear		Card Number	Expiration Date (mm/yyyy)	Card Type	Comments	Default
	Expiration:	July ¥ 2020	~	Save			· · · · · ·			
					1					

Add Card - Adds a line to the grid where users can add a new credit card.

Save Card – Saves changes.

**Delete Card** – Deletes the selected card.

To mark a default credit card on the list, either check the Default box or select the desired

card and click **Set Default**. Set Default will change any set default; checking a box will add additional defaults.

Credit card numbers are masked and stored in an encrypted state in the company database. Click on a Card Number to expose the entire number:

🕂 Add Card 📙 Save Ca	ard 🔀 Delete
Card Number	Expiration Dat
555555555555555555555555555555555555555	12/2008
XXXX-XXXX-XXXX-4444	12/2008
XXXX-XXXX-XXXX-5557	12/2008

Click on an Expiration Date or Card Type to select a new one, and enter/edit a cardholder name under the Comments column.

## **CardControl Transactions Tab**

The CardControl Transactions Tab displays the customer's credit card transactions completed using CardControl. This tab is only available in CardControl versions of SalesPad Desktop. It replaces the Credit Cards tab from previous versions of SalesPad Desktop.

## **PayFabric Transactions Tab**

The PayFabricTransactions Tab displays the customer's credit card transactions completed using PayFabric. This tab is only available in PayFabric versions of SalesPad Desktop.

#### User Fields Tab

All user defined fields on the Customer business object appear under the User Fields tab and can be filled out as needed. Refer to the <u>SalesPad User Defined Fields</u> for more information on configuring and using user fields.



#### Sales Graph Tab

The Sales Graph tab contains a graphical and numerical display of sales data from the payment tables for the customer over a selected time period.



To change displayed data, enter a Start date, End date, Break By value, and Plot option (Price or Freight) and click **Refresh**. Users can also change the graph's appearance with the Value Labels, Stagger Axis Labels, and Rotate Axis Labels check boxes. The Report grid displays Quantity, Price, and Freight grand totals by break point (quarter, week, etc). Click **Print** or **Export** to print or export (to Microsoft Excel) the graph and report.

Value Labels - Show/hide numerical values of each column.

Stagger Axis Labels - Change layout of labels on the screen.

Rotate Axis Labels - Toggle between horizontal and vertical layout.

**Note**: Clicking Print opens a popup window displaying a preview of the graph with options to modify/add a header or footer, add watermarks, change colors, send as email, change document type, etc.

## Extended Pricing Tab

The Extended Pricing tab displays customer- specific promotional prices and effective date ranges for certain items (set up in Dynamics GP).

Contact Addresses	CRM Note	A/R Item History	Sales Docum	ents Credit	Cards Pay	/Fabric Transactions	PayFabric	Wallet	User Fields	Sales Graph	Extended Pricing	( - )
<i> Refresh</i> Item I	Number:	Item Desc	ription:									
Price Sheet ID 🔺	Price Sheet ID 🔺											
Item Number	Item Description	Item Group	From Qty	To Qty	UOfM	Value	Adjusted P	Currency	Start Da	te End Date	FromBas	eBook
Price Sheet ID	2007 PRICING											^
100XLG	Green Phone	OFFICE EQP	1	999,999,9	Each	95	57.00	Z-US\$	1/1/2017	7 12/31/20:	.7	0.00
128 SDRAM	128 meg SDRAM	OFFICE EQP	1	999,999,9	Each	95	128.25	Z-US\$	1/1/2017	12/31/20:	.7	0.00
24X IDE	24x CD-ROM	OFFICE EQP	1	999,999,9	Each	95	38.00	Z-US\$	1/1/2017	7 12/31/20	.7	0.00
256 SDRAM	256 meg SDRAM	OFFICE EQP	1	999,999,9	Each	95	217.55	Z-US\$	1/1/2017	7 12/31/20:	.7	0.00
32 SDRAM	32 meg SDRAM	OFFICE EQP	1	999,999,9	Each	95	47.45	Z-US\$	1/1/2017	7 12/31/20	.7	0.00 ~

Filter the display by entering search criteria in Item Number or Description and clicking **Refresh**.

Drag a column header to the gray bar above the columns to group by that value (Click the gray arrow to expand or collapse the groups).

Contact Addresses	CRM	Note	A/R	Item History	Sales Documents	Credit Cards	PayFabric Trans	actions PayF	abric Wallet	User Fields	Sales Graph	Extended Pricing	( ← →
ಿ Refresh 🛛 Item N	lumber:	100xlg		Item Descript	tion:								
Item Group 🔺													
Item Number	Item D	escriptio	n	From Qty	To Qty	UOfM	Value	Adjusted Price	Currency	Start Date	End Date	From	nBaseBook
✓ Item Group:													
100XLG	Green	Phone		1	999,999,999	Each	60	60.00	Z-US\$	1/1/2014	12/31/20	18	1.00
▲ Item Group: OF	FICE EQP												
100XLG	Green	Phone		1	999,999,999	Each	90	54.00	Z-US\$	3/1/2017	5/31/201	7	0.00
100XLG	Green	Phone		1	999,999,999	Each	95	57.00	Z-US\$	1/1/2017	12/31/20	17	0.00

Double-click a line to open the item information in Inventory Lookup.

## Item Sales Tab

The Item Sales tab displays a pivot grid view of the sales of specific items to the current customer, and the monetary value associated with all sales. The grid calculates data from the last 12 months, and only data from the Order sales document type.

Recurring Sales	Defa	ault Doc Items	Spe	cial Pricing	Saved Attribut	es Contra	ct Pricing	Email Audit	Child Accounts	Equipment	Audit	Item Sales	Item Numbers	Default Item	4 →
Drop Data Items Here															
Item Class	<b></b>	Price		18-Q1	18-Q2	18-Q3									
		10													^
Total															
_i NI	50														
_ RM-ACT		-750													
	[	0													
	[	9		Drop D	ata Iten	ns Here									
	[	75		]											
		171													
		750		]											
RM-ACT Total															

Drag a header to the gray box to group by that value.

## Quick Reports Tab

The Quick Report tab displays the Quick Report(s) set up in Modules > Security Editor (Customer Quick Report). Refer to <u>Quick Reports</u> documentation for more information.

**Note**: When Quick Reports have been added, the name of the tab changes from "Quick Report" to the title of the Quick Report (single) or "Customer Quick Reports" (multiple).

#### Special Pricing Tab

The Special Pricing tab displays existing special pricing and, with proper security, allows users to change price levels and custom pricing for the customer. Refer to the <u>Custom/Special Pricing</u> documentation for more information.

#### **Recurring Sales Tab**

The Recurring Sales tab displays all existing recurring sales definitions for the customer. Definitions can be edited by double-clicking a definition, clicking the Recurring Description name, or highlighting a definition and clicking **Edit**. New recurring sales definitions can also be created from this tab; refer to the <u>Recurring Sales</u> documentation for more information.

#### **Default Item Reps**

This tab will allow users to define item/item class-specific sales reps. When an item is added to a sales order created from the customer, it will set the Sales Rep ID at the line level based on the defined defaults on this tab. If a Class level and Item Number level definition exists, it will take the most specific (item number) and use that sales rep.

Default Doc Items	Special Pricing	Saved Attributes	Contract Pricing	Email Audit	Child Accounts	Equipment	Audit	Item Sales	Item Numbers	Default Item Reps	Group Pric 4		
🕴 🖶 Add Definition	🖶 Add Definition 💥 Delete Definition												
T.	tem Rep Definition II	Item Number		Item Class			Sales Rep 1	D		Customer Num			
	:	L <u>HD-20</u>					FRANCINE	в.	$\checkmark$	AARONFIT0001			

#### **Contract Pricing Tab**

The Contract Pricing tab allows users to set up a contract with a customer, with a specified quantity and date range, for a set price on an item or items. Refer to the <u>Contract Pricing</u> documentation for more information.

#### Saved Attributes Tab

The Saved Attributes tab (4.1+) displays item attributes saved for the customer, and is

covered in Item Attributes documentation.

#### Security

CRM Event Entry - Allows for the creating of CRM Events on the Customer CRM tab.

CRM Note Entry - Allows for the entering of notes on the Customer CRM tab.

Custom Pricing - Allows users to edit customer special pricing from a sales document.

*Customer A/R* - Grants access to the A/R tab on the Customer card.

*Customer A/R Transaction Entry* - Allows the entry of A/R transactions on the Customer A/R tab of the Customer card.

*Customer Addr Card* - Grants access to the Customer Address card, accessed by clicking the hyperlink on the Contact Addresses tab.

*Customer Address Resource - G*rants access to the Contact Resources tab on the Customer Address card.

*Customer AR Detail* - Grants access to the Customer AR Detail window, accessed by clicking the "Balance" hyperlink on the A/R tab of the Customer card.

Customer Audit - Grants access to the Audit tab on the Customer card.

*Customer Card* - Grants access to the Customer card module.

*Customer Child Accounts -* Grants access to the Child Accounts tab on the Customer card.

*Customer Contract Pricing* - Grants access to the Customer Contract Pricing tab on the Customer card.

Customer Credit Cards - Grants access to the Credit Cards tab on the Customer card.

Customer CRM - Grants access to the CRM tab on the Customer card.

*Customer Default Doc items* - Grants access to the Default Doc Items tab on the Customer card.

*Customer Default Item Reps* - Grants access to the Default Item Reps tab on the Customer card.

Customer Email Audit - Grants access to the Email Audit tab on the Customer card.

*Customer Equipment* - Grants access to the Equipment tab of the Customer card.

*Customer Extended Pricing* - Grants access to the Extended Pricing tab of the Customer card.

Customer Group Pricing - Grants access to the Group Pricing tab on the Customer card.

*Customer Holds -* Grants access to the Holds tab on the Customer card.

*Customer Interactions* - Grants access to the Interactions tab on the Customer card.

Customer Item History - Grants access to the Item History tab on the Customer card.

Customer Item Numbers - Grants access to the Item Numbers tab on the Customer card.

Customer Item Sales - Grants access to the Item Sales tab on the Customer card.

Customer Note - Grants access to the Notes tab on the Customer card.

Customer Opportunities - Grants access to the Opportunities tab on the Customer card.

*Customer Overview* - Grants visibility to the Customer card header. This includes Customer Properties, Address & Shipping Information, and Open Sales Documents.

*Customer PayFabric Transactions* - Grants access to the PayFabric Transactions tab on the Customer card.

*Customer PayFabric Wallet* - Grants access to the PayFabric Wallet tab on the Customer card.

Customer Quick Report - Grants access to the Quick Report tab on the Customer card.

Customer Recurring Sales - Grants access to the Recurring Sales on the Customer card.

Customer Resources - Grants access to the Resources tab on the Customer card.

*Customer Sales Documents* - Grants access to the Sales Documents tab on the Customer card.

Customer Sales Graph - Grants Access to the Sales Graph tab on the Customer card.

*Customer Saved Attributes -* Grants access to the Saved Attributes tab on the Customer card.

*Customer Special Pricing* - Grants access to the Special Pricing tab on the Customer card.

Customer User Fields - Grants access to the User Fields tab on the Customer card.

*Open Dynamics GP Customer Card* - Enables the button to open the selected customer in Dynamics GP.

#### Settings

## **Contact/Address Settings**

*Customer Address Columns To Include In Audit* - Customer Address columns that will be audited. If left blank, no extra auditing will be done. Defaults to 'Alt\_Company\_Name; Contact\_Person; Address\_Line\_1; Address\_Line\_2; Address\_Line\_3; City; State; Zip; Country'. *Customer Card Address Lookup Fields* - Address fields to be shown in the lookup editor on the address tab of the sales document screen. Defaults to Address\_Code; Contact\_Person; Address\_Line\_1; City.

## Customer

Customer Columns To Include In Audit - Customer columns that will be audited. If left blank,

no auditing well be done when a Customer column is updated. Defaults to Customer\_Name; Customer\_Class; Corporate\_Customer\_Num; Primary\_Addr\_Code;

Primary\_Bill\_To\_Addr\_Code; Primary\_Ship\_To\_Addr\_Code; Sales\_Person\_ID; Sales\_Territory; Shipping\_Method; Statement\_To\_Addr\_Code.

# **Customer Contact options**

*Accounts Payable Contact Type* - The Contact Type used to flag the Contact display on the Customer A/R tab. This item has no default value.

*Contact Type List* - The values used to populate the Contact Type list. This item has no default value.

Phone 1 Label - Customer field label for the [Phone 1] field. Defaults to Phone 1.

Phone 2 Label - Customer field label for the [Phone 2] field. Defaults to Phone 2.

Phone 3 Label - Customer field label for the [Phone 3] field. Defaults to Phone 3.

# **Customer Inquiry**

*Auto Popup Customer Note* - Set this to True to have SalesPad Desktop display a customer's permanent note in a popup window when the Customer card is accessed. Defaults to False.

*Contact Type Field for a Customer Address* - The User Defined Field in a Customer Address Entry that will store the Contact Type. Defaults to Not\_Used.

*Customer Default Warehouse Enabled* - Enables/disables the Customer Default Warehouse. Stored in User Define Field 1 on a customer. Defaults to False.

*Remember Doc IDs* - Set this to True to have the Customer card remember the last Doc ID selected for quotes, orders, invoices, and returns. Defaults to True.

*Warn When Updating a Customer Address* - Set this to True to display a warning message when updating a customer address. Defaults to True.

# **Customer Layout**

*Load Customer Tabs by Field* - A value used to determine which tabs are loaded based on a setup in the Layout Tab Setup screen. Suggested value is Customer\_Class. Defaults to Customer\_Class.

# **Customer Note**

Note Type List - Delimited list of supported note types. Defaults to CRM;A/R.

# Customer

*Enable Customer Locks* - Enable SalesPad Desktop customer activity locks. These do not appear in GP. All users should log out of SalesPad Desktop for this to take full effect. Defaults to False.

# Sales

*Customer Discounts Field* - The Customer Master user field used to track what discount(s) the customer is eligible to receive. This item has no default value.

*Fast Ship To Ordering Enabled* - Fast Ship To Ordering allows users to double-click on the contact name (in Customer Search) which highlights the contact on the Customer card, and then auto-sets the Ship To address for new sales documents. Defaults to False.

*Save Credit Card to Customer Record* - If True, updates customer's credit card info with the most recent credit card used. Defaults to True.

# Sales Entry

*UPS Zone Options* - The list of options for the UPS Zone field on the customer and the sales document. Leave blank to allow the user to free-form. This item has no default value.