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Customer Card

Megan De Freitas - 2025-07-09 - Sales

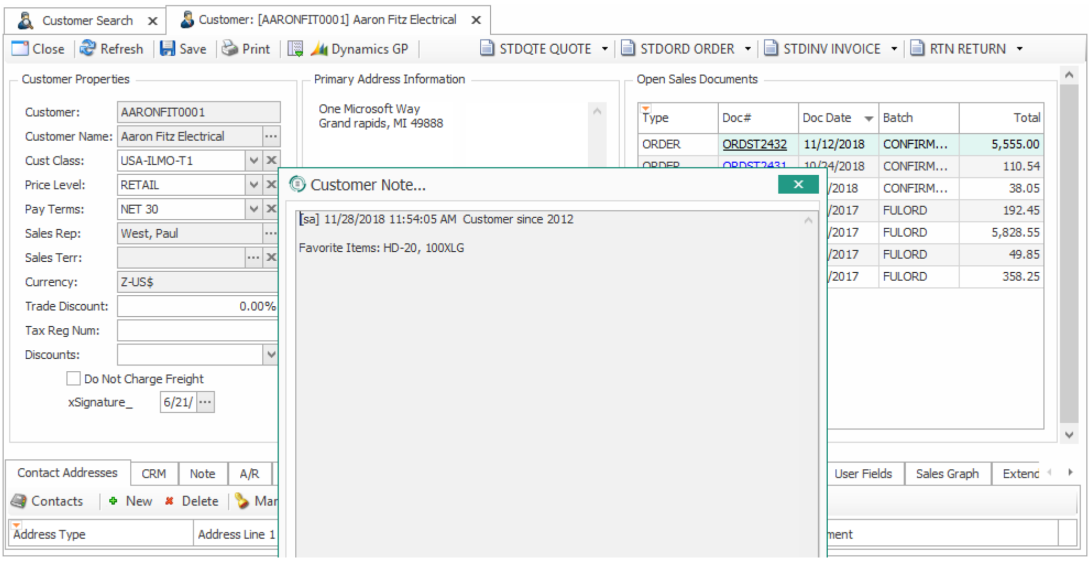
Overview

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 [Customer Search]() and [Creating a New Customer]() documents for further instruction.

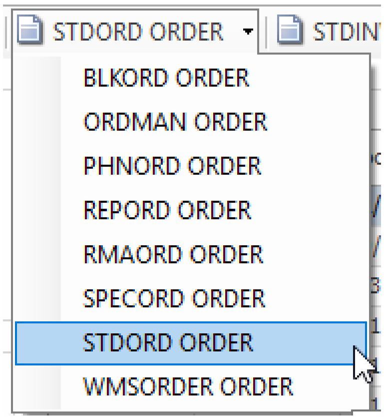
With proper configuration (Auto Popup Customer Note under Customer Inquiry), the Customer Notes screen may pop up when users first access the customer card. Customer Notes display any important notes regarding the customer that have been added under the Notes tab. Click **OK** to exit the popup:



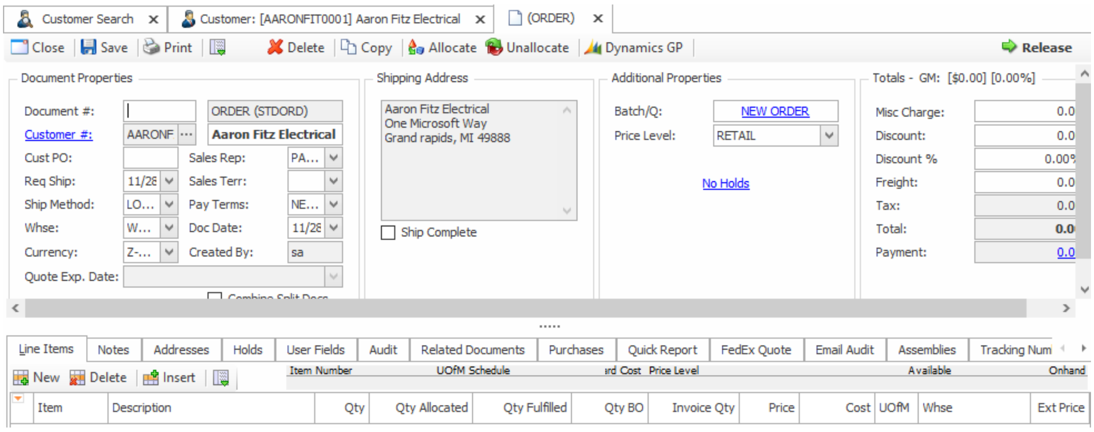
Customer Card Header

Sales Documents

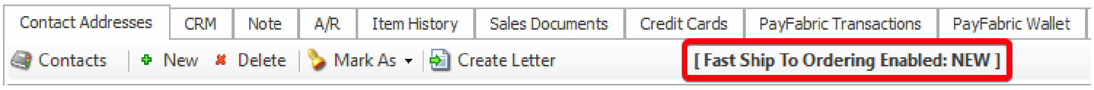
To create a new sales document for the current customer, select an available order type from the header buttons. For example, click the dropdown arrow and select STDORD ORDER to create a standard order for the customer:



The sales document will open in a new tab.



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:



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.

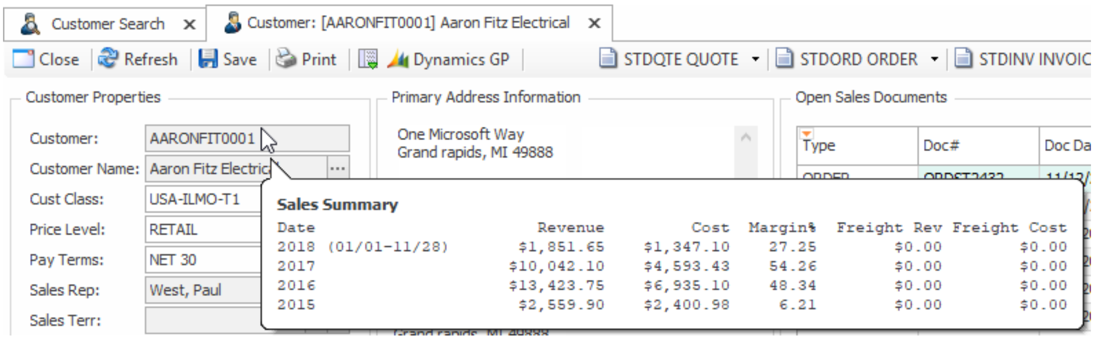
Save: Saves any changes on the Customer card.

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.



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).

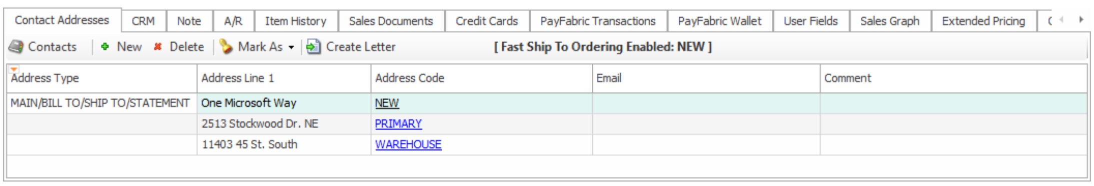
Default Shipping Information

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.

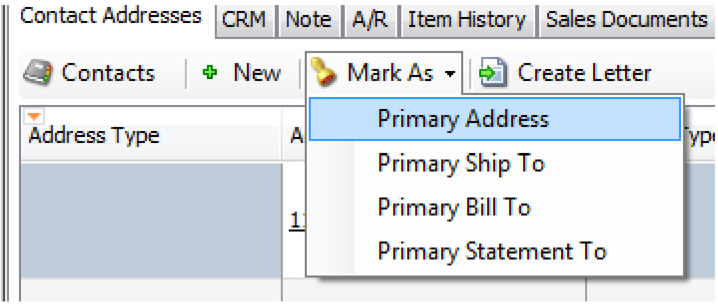
Contact Addresses Tab



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

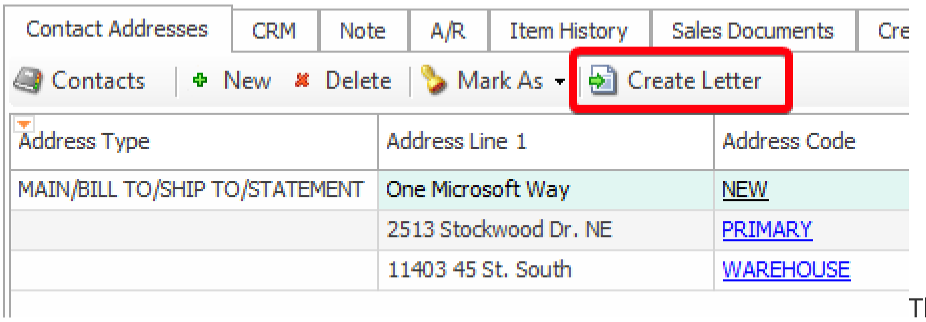
Note: User defined fields on the Customer Addr business objects can be added as columns on the Contacts grid. Refer to the SalesPad User Defined Fields document for more information.

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



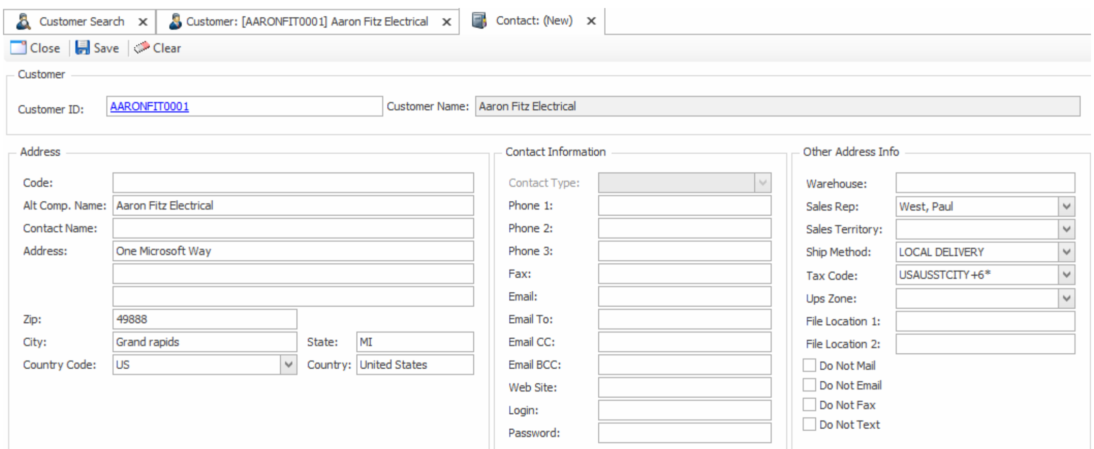
The selection will display under the Address Type column.

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 [this documentation]() for examples of Merge Fields). Select a contact, click **Create Letter** and open the document from the dialog box.



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 pre-filled:



Complete the contact' s information and change any defaults if necessary. Any custom user fields for the Customer Addr business object (refer to the [SalesPad User Defined Fields document]()) 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

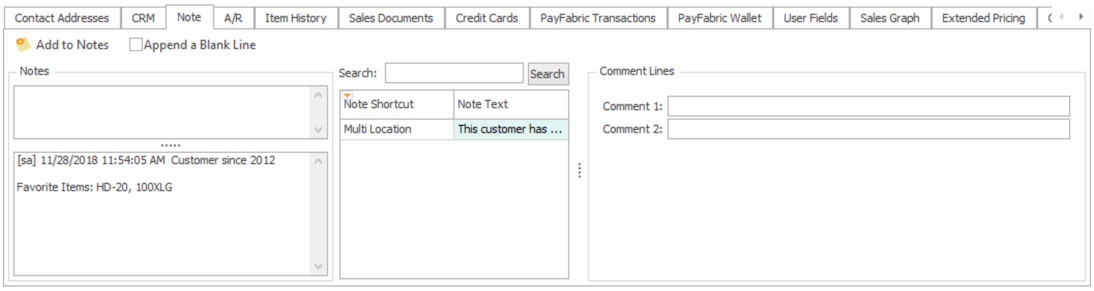
The CRM tab allows tasks to be scheduled and customer interaction notes to be recorded. Refer to the [SalesPad CRM Tasks and Notes]documentation for setup and usage information.

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).

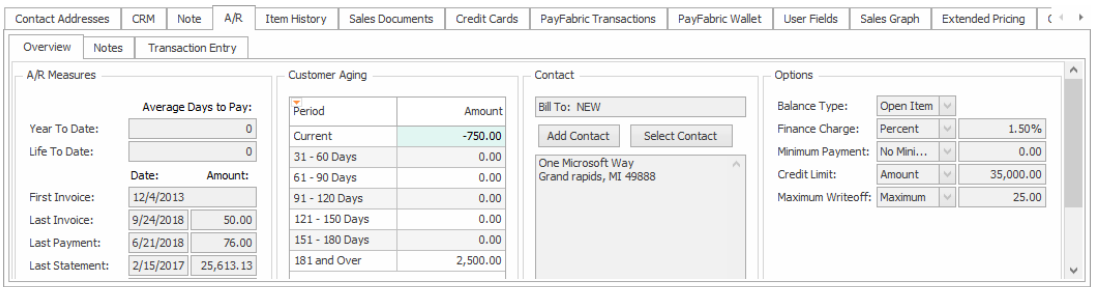
Be sure to save any changes using the Save button on the Customer card header.



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

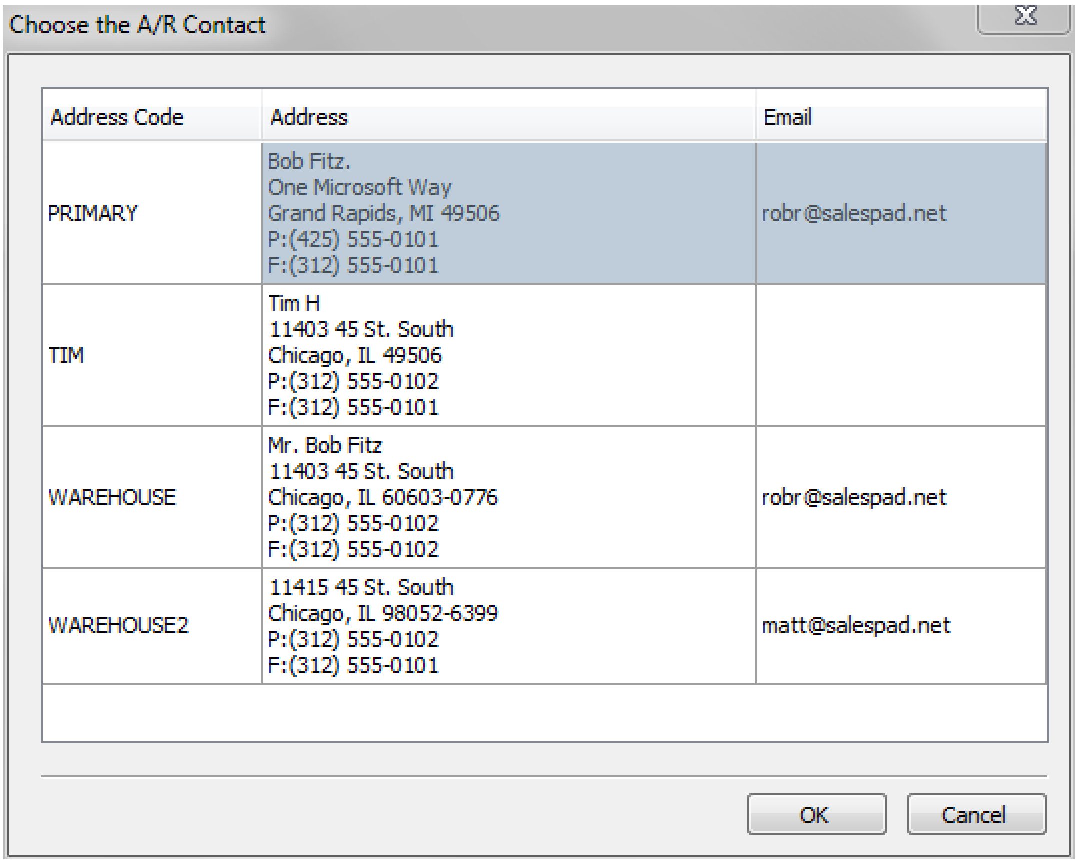
The A/R tab displays information on the customer's past and current Accounts Receivable, including current total balance due, average number of days to pay, aging period, and A/R-related interaction notes.



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:

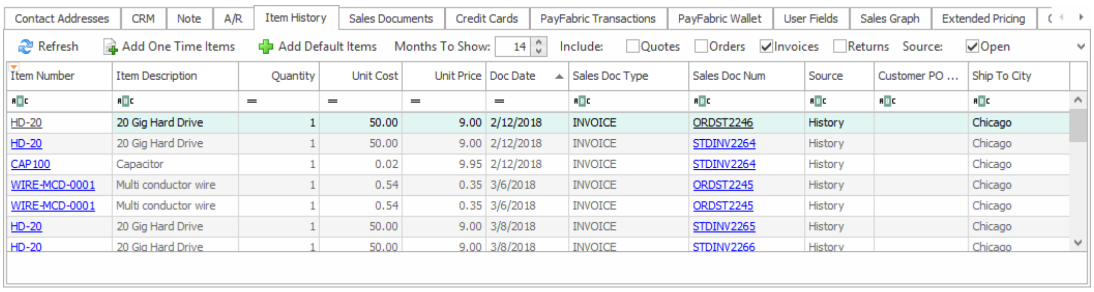


A/R notes display on the right side of the A/R tab. Click **New Note** to add a note, or double-click an existing note to edit it.

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.



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

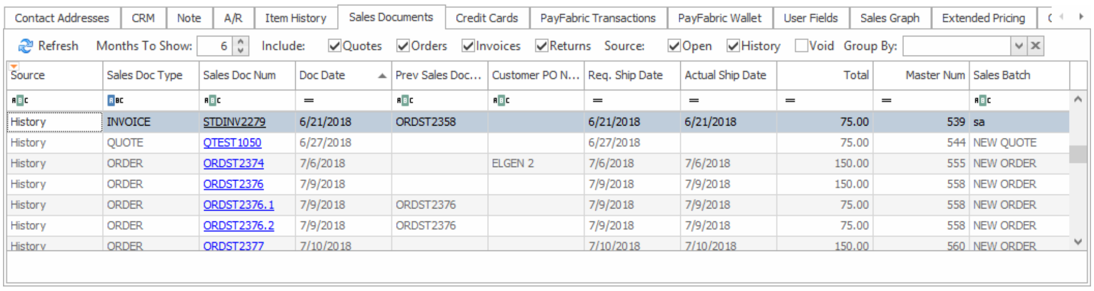
To display results in expandable/collapsible sections by document type, select Group by Doc Type and click **Refresh.**

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 [Customer One Time Items](#) documentation and [Customer Default Items](#) 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.



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

Credit Cards Tab (pre-4.1 versions only)

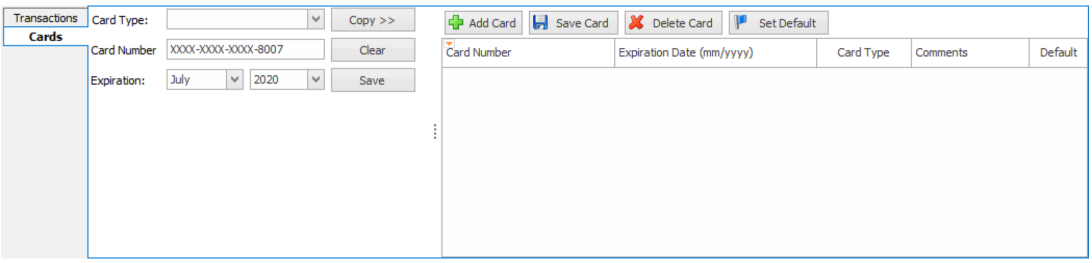
The Credit Cards tab displays a customer's credit card transaction history and the customer's credit cards stored in Dynamics GP and SalesPad Desktop credit card tables. Toggle between Transactions and Cards on this tab (security required).

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.



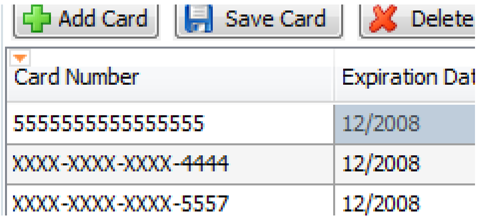
Add Card – Adds a line to the grid where users can add a new credit card.

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:



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

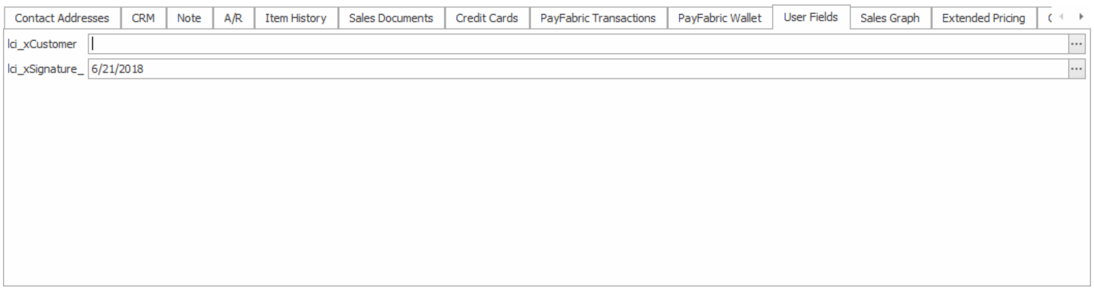
The CardControl Transactions Tab displays the customer's credit card transactions completed using CardControl. This tab is only available in CardControl versions of SalesPad Desktop. It replaces the Credit Cards tab from previous versions of SalesPad Desktop.

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.

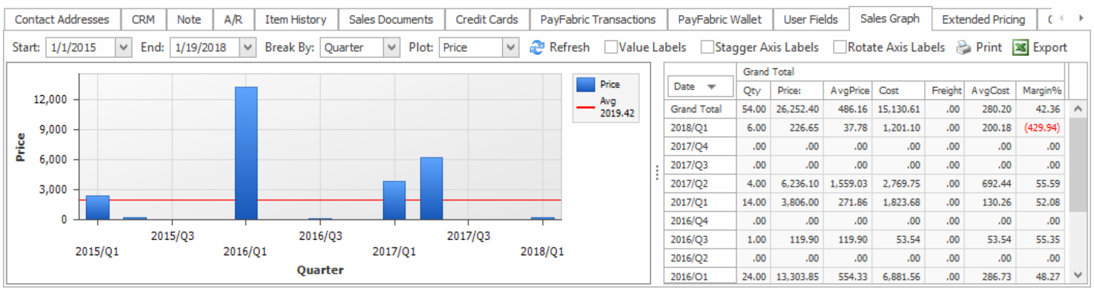
User Fields Tab

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 [SalesPad User Defined Fields]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.

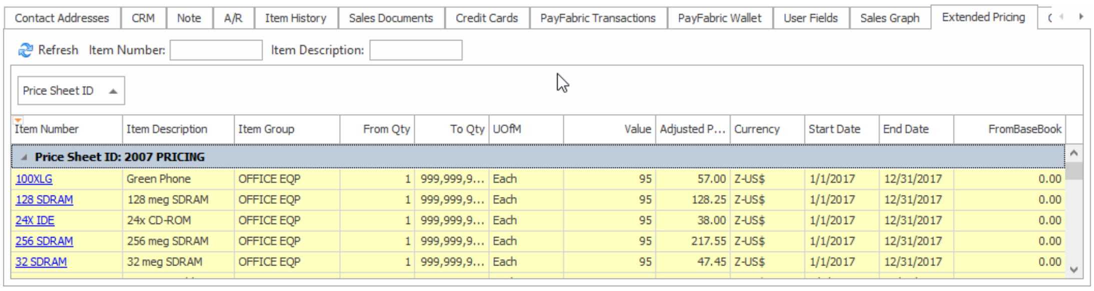
Stagger Axis Labels – Change layout of labels on the screen.

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

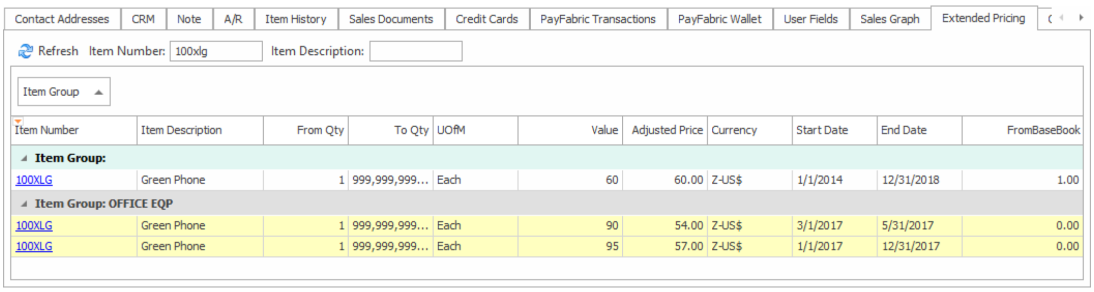
The Extended Pricing tab displays customer- specific promotional prices and effective date ranges for certain items (set up in Dynamics GP).



Item Number	Item Description	Item Group	From Qty	To Qty	UOfM	Value	Adjusted P...	Currency	Start Date	End Date	FromBaseBook
Price Sheet ID: 2007 PRICING											
100XLG	Green Phone	OFFICE EQP	1	999,999,9...	Each	95	57.00	Z-US$	1/1/2017	12/31/2017	0.00
128 SDRAM	128 meg SDRAM	OFFICE EQP	1	999,999,9...	Each	95	128.25	Z-US$	1/1/2017	12/31/2017	0.00
24X IDE	24x CD-ROM	OFFICE EQP	1	999,999,9...	Each	95	38.00	Z-US$	1/1/2017	12/31/2017	0.00
256 SDRAM	256 meg SDRAM	OFFICE EQP	1	999,999,9...	Each	95	217.55	Z-US$	1/1/2017	12/31/2017	0.00
32 SDRAM	32 meg SDRAM	OFFICE EQP	1	999,999,9...	Each	95	47.45	Z-US$	1/1/2017	12/31/2017	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).

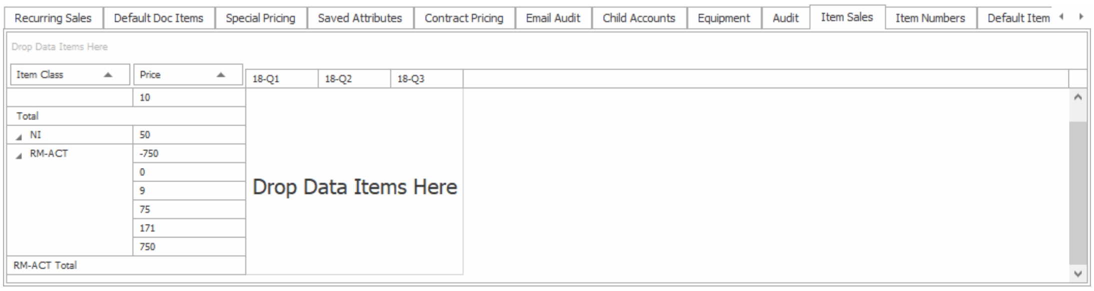


Item Number	Item Description	From Qty	To Qty	UOfM	Value	Adjusted Price	Currency	Start Date	End Date	FromBaseBook
Item Group:										
100XLG	Green Phone	1	999,999,999...	Each	60	60.00	Z-US$	1/1/2014	12/31/2018	1.00
Item Group: OFFICE EQP										
100XLG	Green Phone	1	999,999,999...	Each	90	54.00	Z-US$	3/1/2017	5/31/2017	0.00
100XLG	Green Phone	1	999,999,999...	Each	95	57.00	Z-US$	1/1/2017	12/31/2017	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.



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 Quick Reports 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

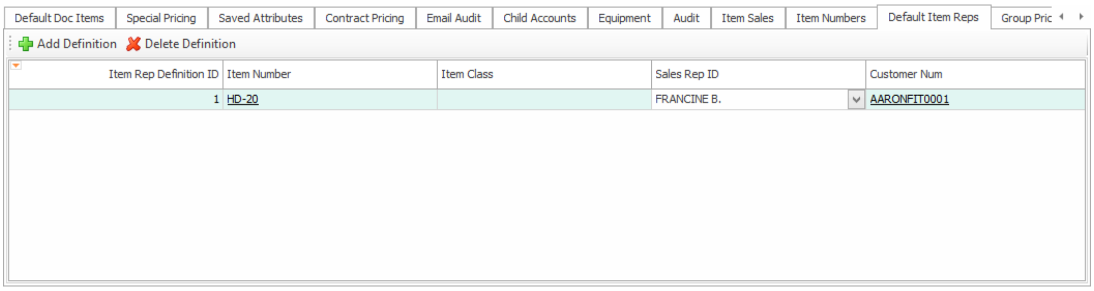
The Special Pricing tab displays existing special pricing and, with proper security, allows users to change price levels and custom pricing for the customer. Refer to the Custom/Special Pricing documentation for more information.

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 Recurring Sales 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.



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 Contract Pricing 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.