

<u>Knowledgebase</u> > <u>Settings</u> > <u>Customer Class</u>

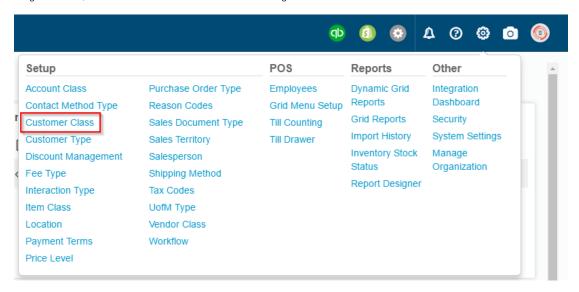
Customer Class

Cavallo Support - 2025-08-06 - Settings

Overview

SalesPad Cloud's Customer Class function allows you to create a category (or class) and set defaults for all customers assigned to the same class. This helps you group sets of customers and allows for quick customer creation. When a new or existing customer is assigned to a Customer Class, you will be prompted to roll down class defaults, like Sales Person, Sales Territory, Account settings, Price Level, and Payment Terms.

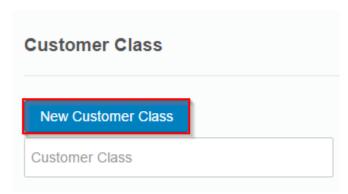
To get started, select **Customer Class** from the Settings menu.



Customer Class

Create a Customer Class

To create a Customer Class, click the New Customer Class button in the upper left-hand corner of the screen.



The Customer Class drawer will appear. Fill out the information fields in this drawer. For a brief explanation of the different information fields in the Customer Class drawer, click the bolded text below:

Customer Class

Customer Class - Allows you to give the Customer Class a unique name

Location - Assigns a Location to this Customer Class

Payment Terms - Assigns Payment Terms to this Customer Class

Price Level - Assigns a Price Level to this Customer Class

Salesperson - Assigns a Salesperson to this Customer Class

Sales Territory - Assigns a Sales Territory to this Customer Class

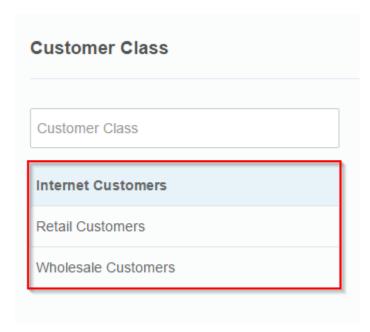
Shipping Method - Assigns a Shipping Method to this Customer Class

Tax Code - Assigns a Tax Code to this Customer Class

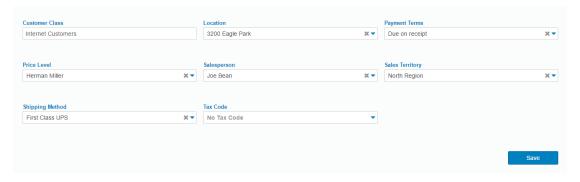
When you've finished entering your information, click Save.

Edit a Customer Class

To edit an existing Customer Class, first select the Customer Class from the list on the left-hand side of the Customer Class window.



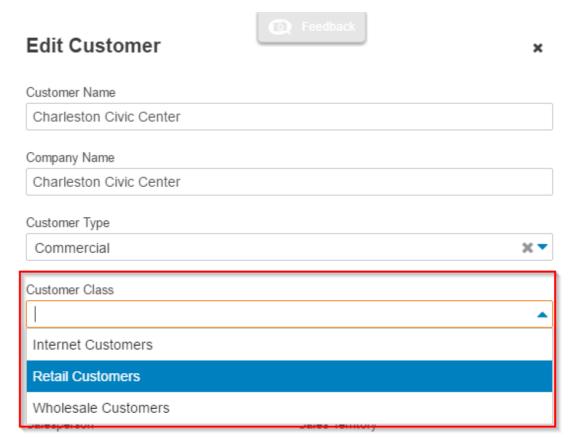
Once you've selected the Customer Class you want to edit, make your changes in the information fields on the right-hand side of the screen.



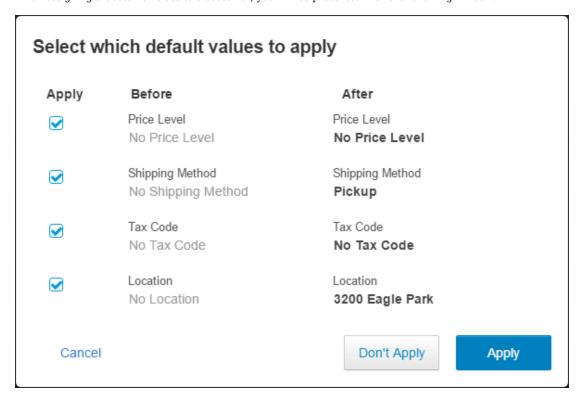
When you've finished making your changes, click Save.

See it in Action

Customer Classes are assigned to Customers in the New or Edit Customer drawers.



When assigning a Customer Class to a customer, you will be presented with the following window.



If you don't want a particular Customer Class setting to apply to this customer, even though you're assigning the customer to this Customer Class, uncheck the box for that default and click **Apply**.

When assigning a Customer Class to a customer, the customer settings that are blank will be filled to match the Customer Class settings. For example, if a customer already has a Sales Territory assigned to it and a Customer Class with a different Sales Territory is then assigned to this customer, the Sales Territory field will not be overwritten.

If a Customer Class is assigned to a customer and a field (such as Sales Territory) is then cleared out, running a data import to fill other fields will fill the cleared-out field with the Customer Class value.