Customer Class

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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.

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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**.

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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**.

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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.

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