



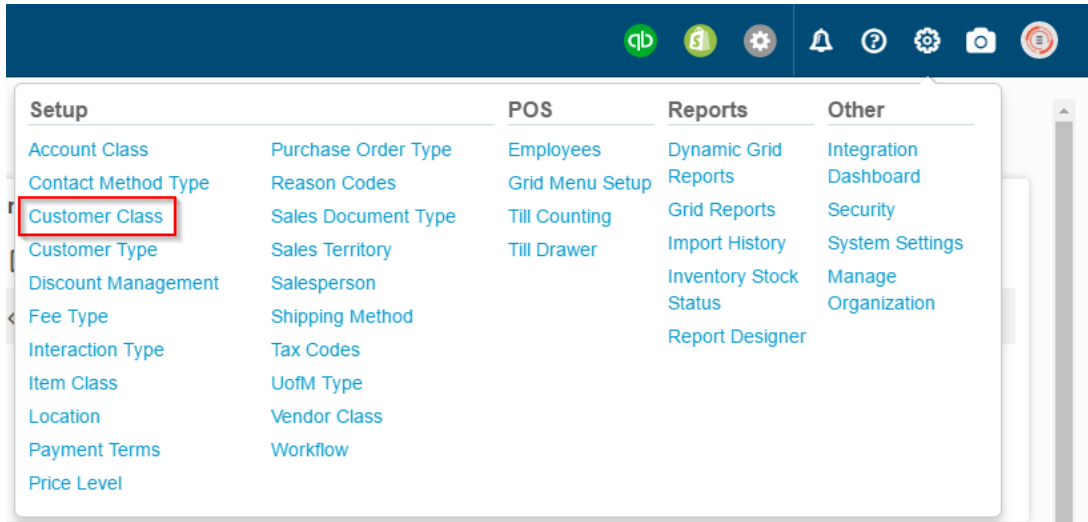
## Customer Class

Megan De Freitas - 2024-12-02 - 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.



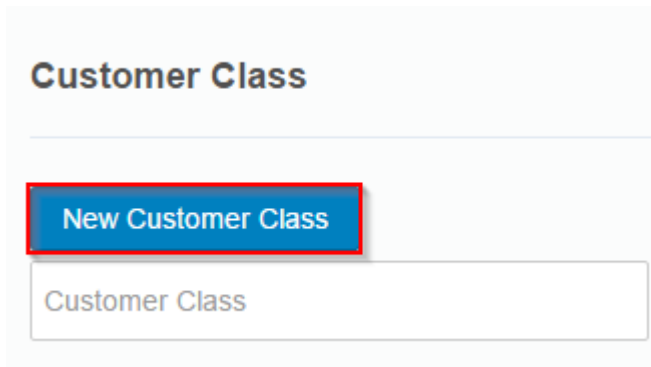
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### Customer Class

#### 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 a [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

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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.

## Customer Class

Customer Class

- Internet Customers
- Retail Customers
- Wholesale Customers

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.

<b>Customer Class</b> Internet Customers	<b>Location</b> 3200 Eagle Park	<b>Payment Terms</b> Due on receipt
<b>Price Level</b> Herman Miller	<b>Salesperson</b> Joe Bean	<b>Sales Territory</b> North Region
<b>Shipping Method</b> First Class UPS	<b>Tax Code</b> No Tax Code	

Save

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.

## Edit Customer

Feedback

x

Customer Name

Charleston Civic Center

Company Name

Charleston Civic Center

Customer Type

Commercial

Customer Class

|

Internet Customers

**Retail Customers**

Wholesale Customers

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

### Select which default values to apply

Apply	Before	After
<input checked="" type="checkbox"/>	Price Level No Price Level	Price Level <b>No Price Level</b>
<input checked="" type="checkbox"/>	Shipping Method No Shipping Method	Shipping Method <b>Pickup</b>
<input checked="" type="checkbox"/>	Tax Code No Tax Code	Tax Code <b>No Tax Code</b>
<input checked="" type="checkbox"/>	Location No Location	Location <b>3200 Eagle Park</b>

Cancel Don't Apply Apply

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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