



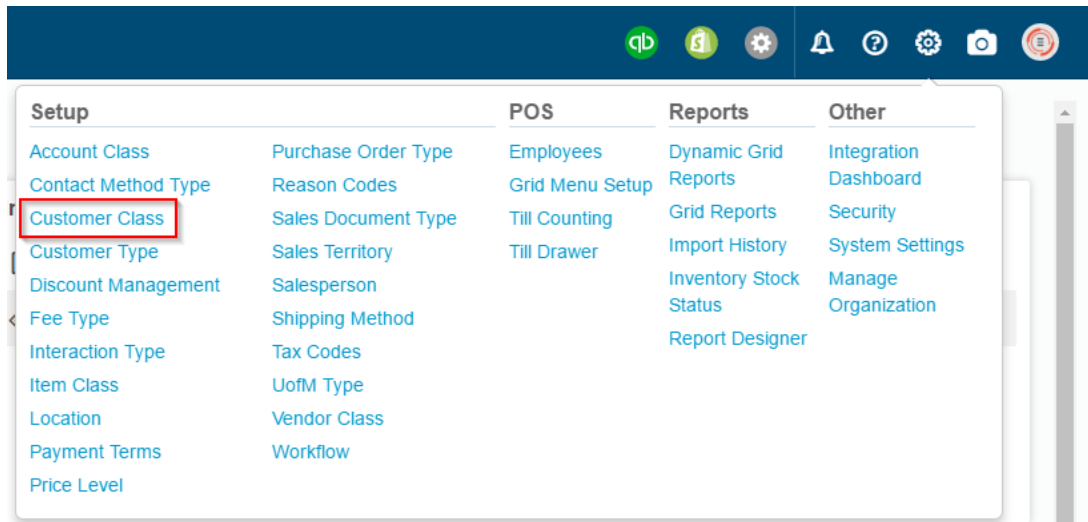
Customer Class

Megan De Freitas - 2025-06-10 - 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.

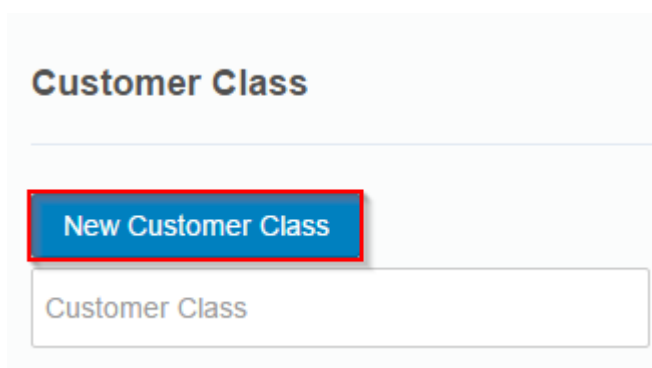
To get started, select **Customer Class** from the Settings menu.



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

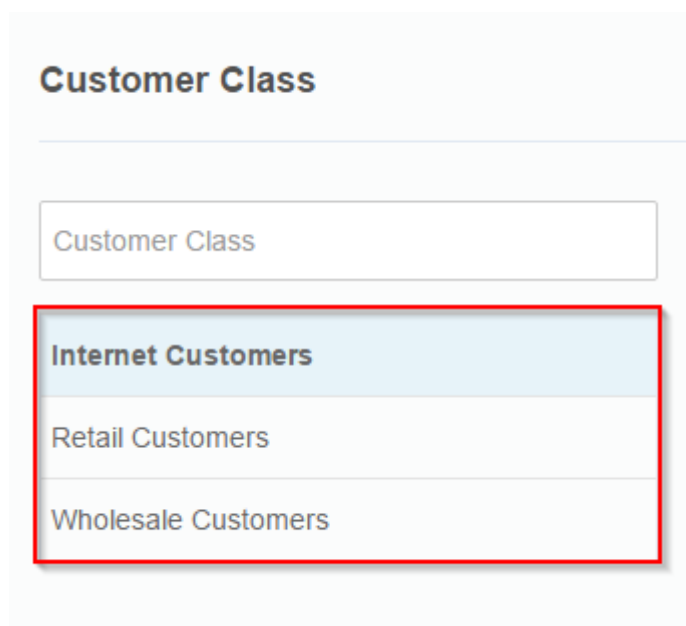
Shipping Method - Assigns a Shipping Method to this Customer Class

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.



The screenshot shows a window titled "Customer Class". At the top, there is a text input field labeled "Customer Class". Below this, there is a list of three customer classes: "Internet Customers", "Retail Customers", and "Wholesale Customers". The "Internet Customers" option is highlighted with a light blue background and is enclosed in a red rectangular box, indicating it is the selected option.

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.


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

Save

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.

 Feedback

Edit Customer ✕

Customer Name

Company Name

Customer Type

Customer Class

Retail Customers

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

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.