Customer Search

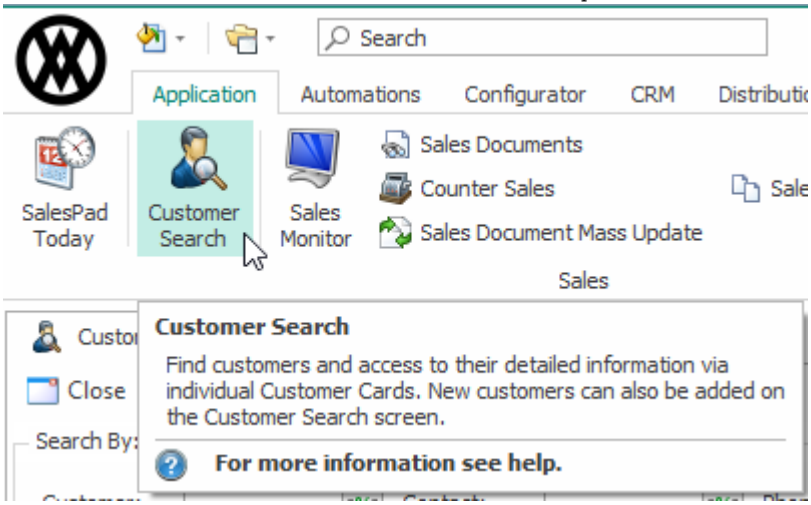
Cavallo Support - 2026-04-09 - Sales

Overview

Customer Search in SalesPad Desktop allows users to quickly find customers, their contact addresses, and access detailed customer information via individual Customer Cards. New customers can also be created by clicking New on the Customer Search header (See also: Creating a New Customer).



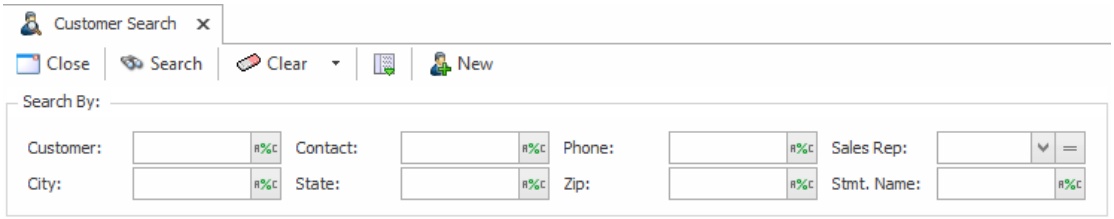
To open, select Customer Searcher under the Application tab on SalesPad's top ribbon. You may also find Customer Search under the Sales Tab and the modules dropdown >> Sales >> Customer Search.



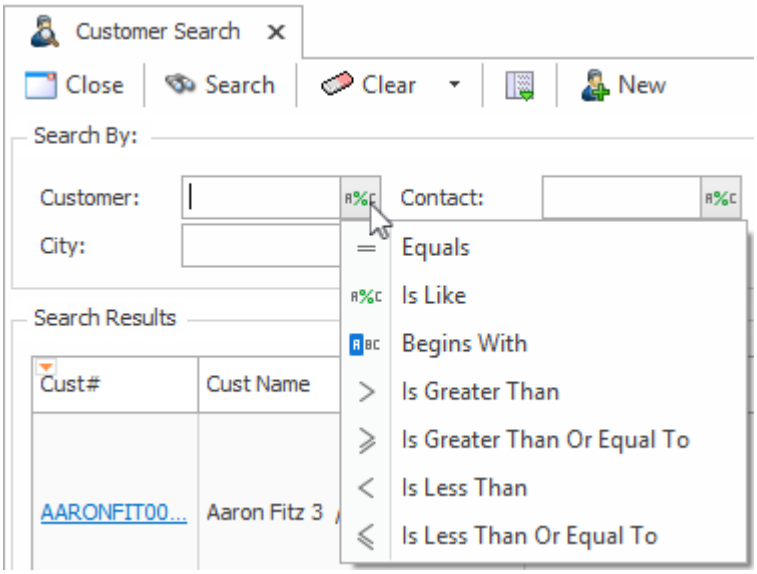
Search Criteria

There are many tools in Customer Search to help you find your customers and contacts. Our base search fields include:

- Customer (Searches Customer and Customer Number by default. Additional fields may be searched using the Settings at the bottom of this article)
- Contact
- Phone
- Sales Rep (a multi-select dropdown)
- City
- State
- Zip
- Statement Name



Each of these fields will have Search Operator on the right of the text entry that will change how the field is searched for. To change the search criteria, click on the Search Operator Option as seen below:

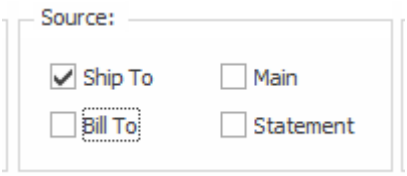


Custom Search allows you to search on one additional search field not already defined above. You may select your new field using the Search Field dropdown and then input your Search Value.



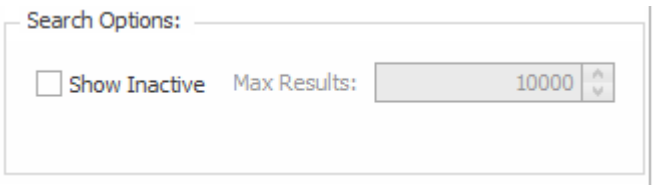
When a source is selcted, only contacts with that address type (and therefore customers that have a contact with that address type) will be returned. If multiple sources are selected, the search will attempted to find contacts that are marked as each of those sources. For example if Ship To and Bill To are selected, only contacts that are marked as both the Ship To and Bill To will be selected and if a contact is only marked as one of these options, it will not be returned.

- If no Source is selected, all contacts will be returned regardless of address type, including lack of address type.



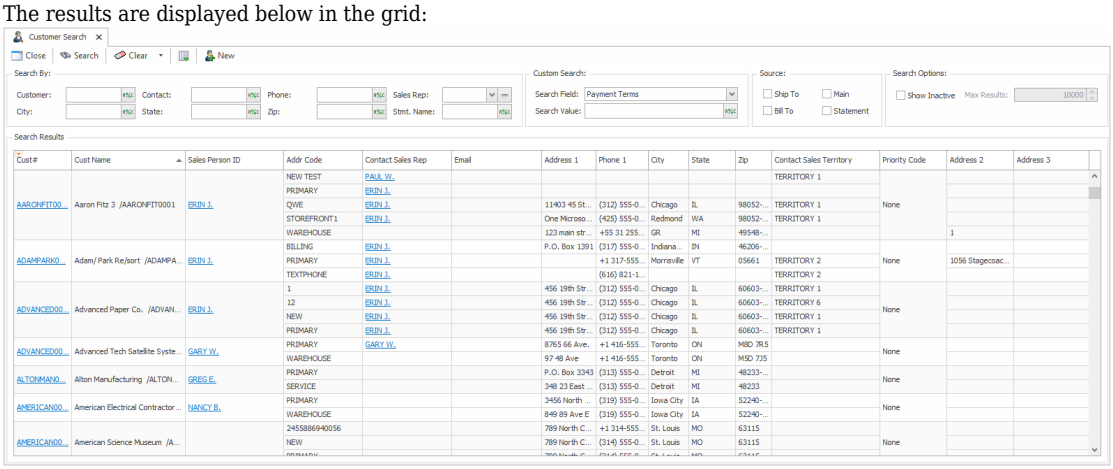
Additional Search Options include a Show Inactive checkbox and a Max Results limitor in order to help performance and prevent expensive queries.

- You may change the default max results limit by updating the following Security Setting: *Customer Search >> Max Results Limit*
- Users may also update the max results limit under Search Options manually if they have the following Security Setting enabled: *Customer Search >> Can Change Max Results*



Searching For a Customer

Once desired search criteria is entered, click **Search** (or hit **Enter**). You can also search with no criteria to display all customers in the system.
The results are displayed below in the grid:



To open a customer, click on the blue Customer Number hyperlink or double-click the row.

Note: The Search Results grid can be customized to include only the desired information. Drag a column header off the grid to remove, or right click on the header and select **Column Chooser** to add a column.

Security

Customer Search **-** Allows users to open the Customer Search module

Customer Search sub-securities:

- *Allow Alternate Customer Number Row Colors:* Enable alternating row colors on the Customer Search grid.
- *Allow Free Typing In Sales Rep Search Field:* When enabled, the Sales Rep search field will be a free type text field instead of a dropdown.
- *Allow Multiple Customer Search Forms:* Turns on the ability to have multiple customer seach forms open.
- *Allow Screen Layout Customization:* Turns on the ability to customize the layout.
- *Allow Search With No Parameters:* When disabled, blank searches are not allowed.
- *Can Change Max Results:* Enables/disables the Max Results option.
- *Can Create Customers:* Allows a user to create a new customer.
- *Can Export Grid:* Allows a user to export the grid to an Excel file.
- *Can Print Grid:* Allows a user to Print the grid.
- *Can Update Grid:* Allows a user to update the "Don't Email", "Don't Fax", and "Don't Mail" columns on the grid.
- *Default New Customer Values From Search Values:* Takes the current customer search values and fills in corresponding fields in the new customer card.
- *Disable Search Prompt:* Disables the search warning prompt.
- *Max Results Limit:* Sets the max number of results that will be returned.

Note: You must log out and back in, or click Reset Security in the Security Editor, for Security changes to take effect.

Settings

- *Search 1st Address Line For Customer Name* - If True, will search the customer's first address line for the customer's name.
- *Search Address 2* - If True, will search the second address line in the customer's address, if it exists.
- *Search Address 3* - If True, will search the third address line in the customer's address, if it exists.
- *Search Alternate Company Name* - If True, will search the Alternate Company Name as part of the customer search.
- *Search Contact Address Codes* **-** If True, will search the customer contact's address code as part of the customer search.
- *Search Contact Names* **-** If True, will search the customer contact's name as part of the customer search.
- *Search Customer Name Only* **-** If True, will only search by the customer name (ignores customer name and ID).
- *Search Email Address* **-** If True, will search the customer's Email address.
- *Search Phones* - If True, will search phone numbers as part of the customer search.