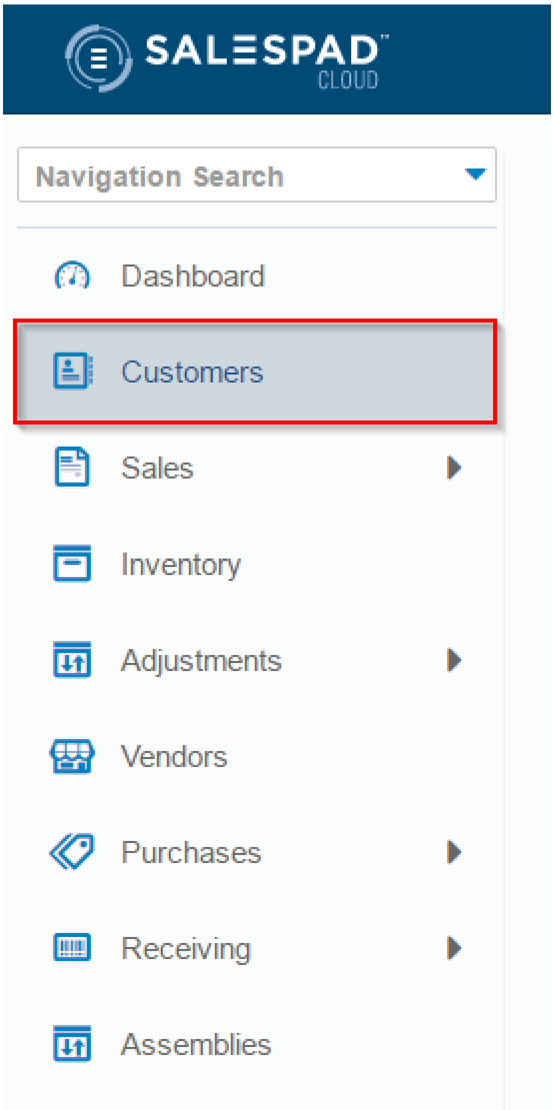
Customers

Megan De Freitas - 2024-12-02 - Modules

Overview

SalesPad Cloud's Customers module is where you create new customers and manage existing customers. You can also create a new transaction directly from the customer card. Dashboard reports are available in the Customers module; click here for more information.

To get started, click on the **Customers** icon on the left-hand side of the screen.



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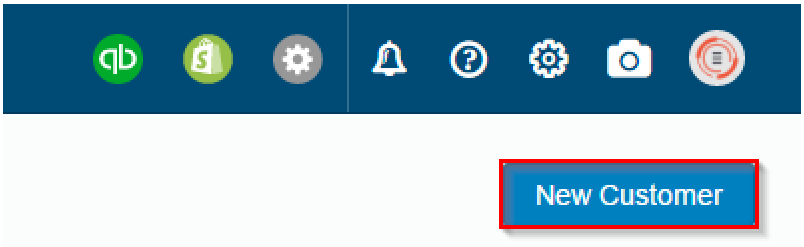
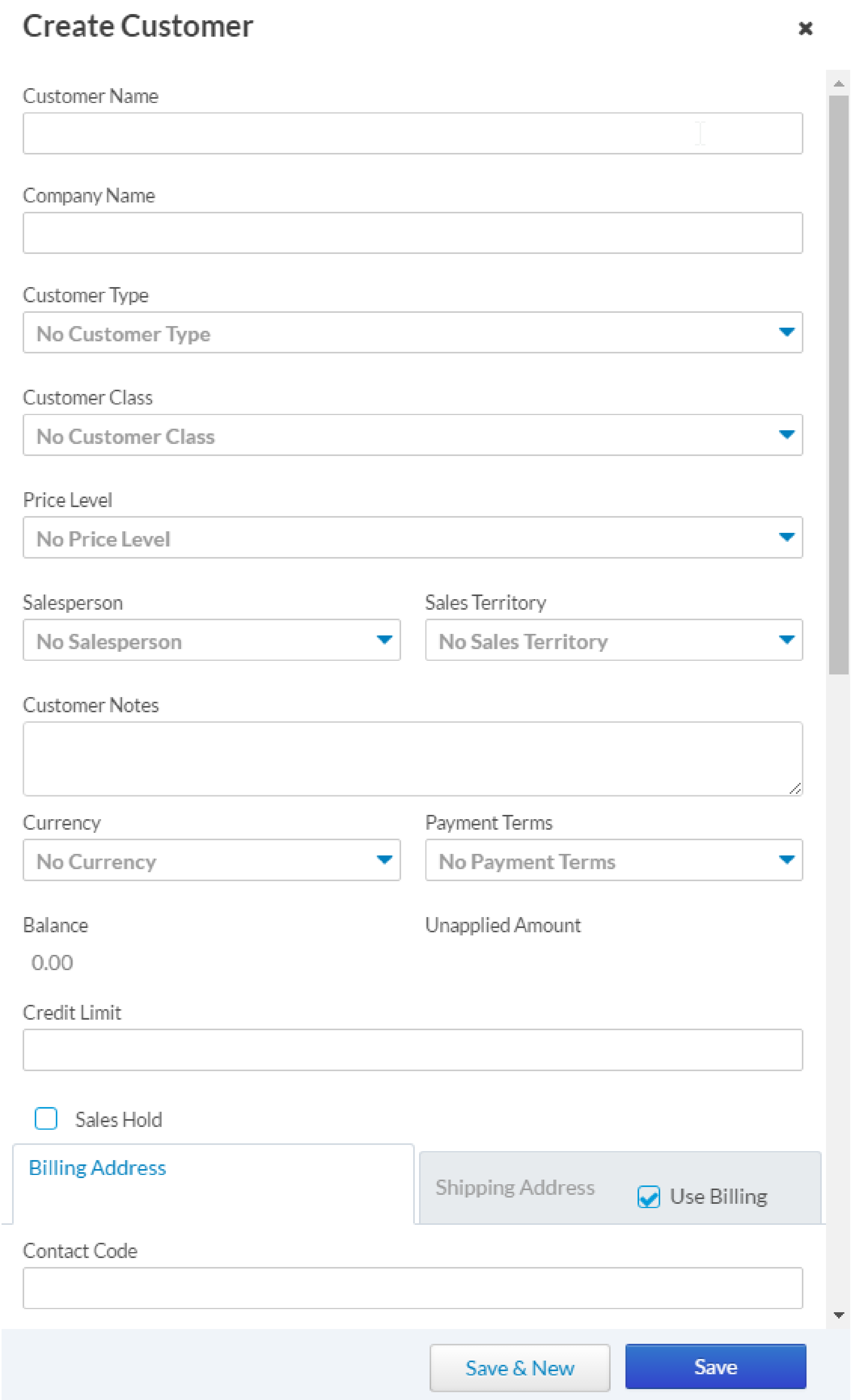
Create and Edit Customers

Create a New Customer

To create a new customer, click the **New Customer** button in the upper right-hand corner of the screen.



The Create Customer drawer will appear. Fill in the information fields and click **Save** when finished.



For a brief explanation of the information fields in the Create Customer drawer, click here:

Create Customer

Customer Name - Allows you to create a name for the customer

Company Name - Allows you to create a name for the company the customer is associated with

Customer Type - Assigns the customer to a Customer Type, such as High Revenue, Low Revenue, etc.

Customer Class - Assigns the customer to a Customer Class, which helps you categorize your customers (if Barnes & Noble was your customer, their Customer Class might be Booksellers)

Price Level - Chooses the Price Level for this customer

Salesperson - Assigns a Salesperson to this customer

Sales Territory - Places this customer in a Sales Territory

Customer Notes - Provides a space for recording notes about this customer

Currency - Indicates the currency used for this customer

Payment Terms - Assigns a set of Payment Terms to the customer (Cash on Receipt, Net 10, etc.)

Credit Limit - Designates any sort of credit limit associated with this customer

Tax Reg Num - Assigns a tax registration number to the customer

Tax Exempt - Indicates whether or not the customer is tax exempt

Sales Hold - Indicates whether or not the customer is on a sales hold

Contact Code - Provides a space for you to assign a contact code for this customer

Contact Person - Allow you to select the contact for this customer; click here to learn how to create a contact

Salesperson - Assigns a Salesperson to this customer

Shipping Method - Assigns a Shipping Method to the billing and/or shipping contact. The shipping method on the Shipping contact will default on the sales document

Location - Assigns a Location to the customer. The location will default on the sales document

Tax Code - Assigns a tax code to the Billing and/or Shipping contact. The tax code assigned to the Shipping contact will default on the sales document. This can be changed via a setting in System Settings < Sales Settings

Ship Complete - Indicates that partial shipments are not accepted by this customer; an order must be completely fulfilled before shipping.

Print Contact - Prints the contact information on any purchase order for this customer.

Admin Lock - Prevents users other than admins from altering information for this customer

Is Custom - Indicates an international address for this customer's contact

Name, Address 1, etc. - Address information for this customer

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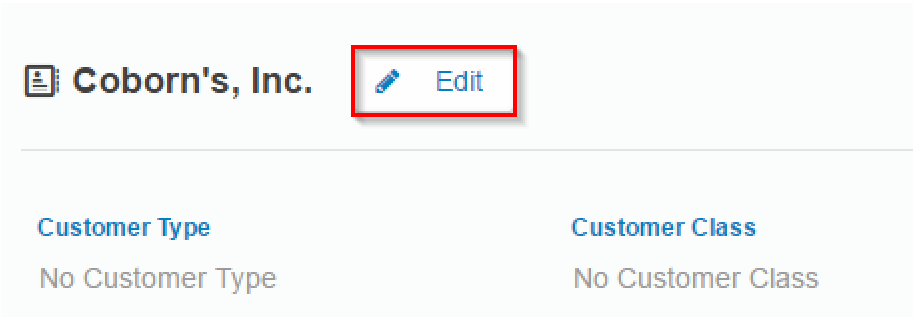
Edit an existing Customer

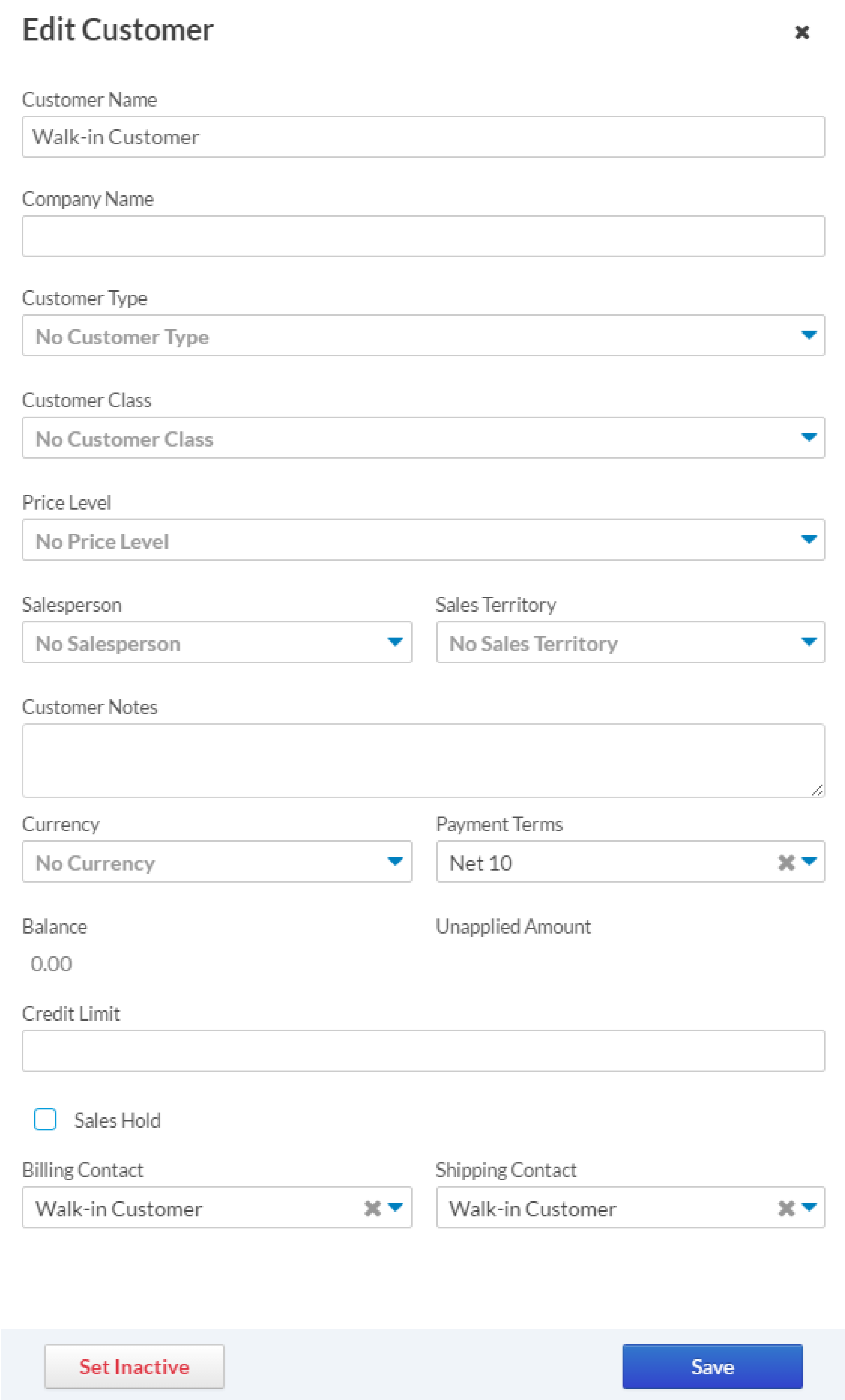
To make changes to an existing customer, select that customer from your grid in the Customer module.

Chrissy Renne	Chrissy Renne	Stratford
Coborn's, Inc.	Inc. Coborn's	Saint Cloud
Colorado Outlet	Colorado Outlet	Colorado Springs
Dave Erny	Dave Erny	Morristown
David Zevetchin	David Zevetchin	Oxford

This will redirect you to the customer card. Once inside the customer card, click the **Edit** button next to the name of the customer.



The Edit Customer drawer will appear. Make your necessary changes here and click **Save** when you are finished.



For a brief explanation of each of the information fields in the Edit Customer drawer, click here:

Edit Customer

Customer Name - Allows you to create a name for the customer

Company Name - Allows you to create a name for the company the customer is associated with

Customer Type - Assigns the customer to a Customer Type, such as High Revenue, Low Revenue, etc.

Customer Class - Assigns the customer to a Customer Class, which helps you categorize your customers (if Barnes & Noble was your customer, their customer class might be Booksellers)

Price Level - Chooses the Price Level for this customer

Salesperson - Assigns a Salesperson to this customer

Sales Territory - Places this customer in a Sales Territory

Customer Notes - Provides a space for recording notes about this customer

Currency - Indicates the currency used for this customer

Payment Terms - Assigns a set of Payment Terms to the customer (Cash on Receipt, Net 10, etc.)

Credit Limit - Designates any sort of credit limit associated with this customer

Sales Hold - Indicates whether or not the customer is on a sales hold

Billing Contact - Indicates the contact person for billing this customer; click here to learn how to create a contact

Shipping Contact - Indicates the contact person for shipping to this customer; click here to learn how to create a contact

Set Inactive - Makes the customer inactive within your company

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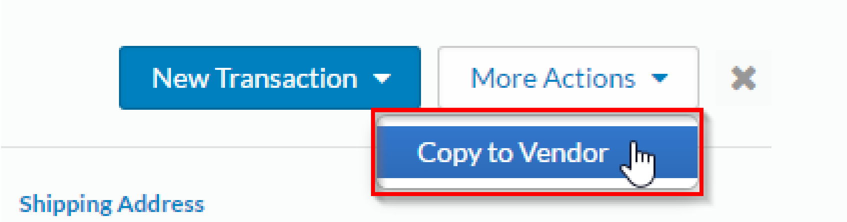
Create a Vendor from a Customer

To create a vendor based off of a customer, click **Copy to Vendor** in the More Actions dropdown in the upper right-hand corner of the Customer card.



SalesPad Cloud will generate a Vendor card based off of the customer information. Please reference our [Vendors documentation] for more information on filling out the Vendor card.

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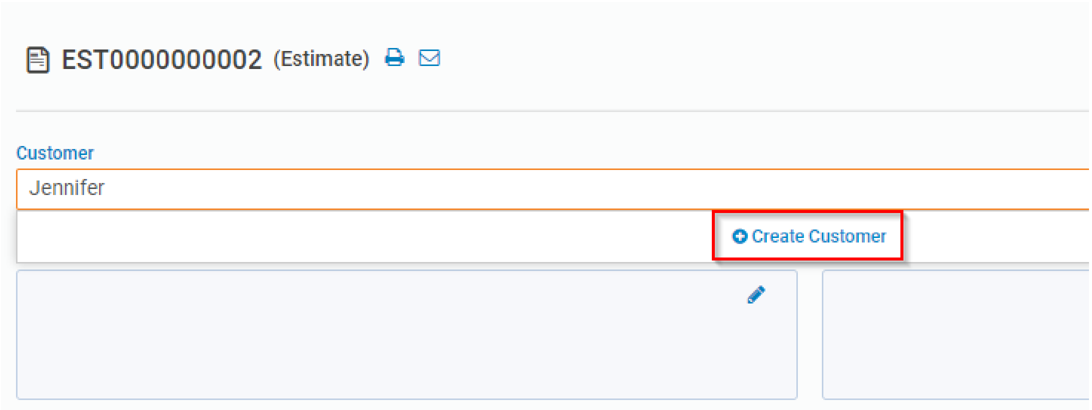
Create a Customer from a Sales Document

To create a new customer straight from a sales document, simply start typing the customer's name in the the Customer field, then select the **Create Customer** option when it appears in the dropdown below the Customer field.



The Create Customer drawer will appear. Fill out whatever information you want to put in for the customer at this time, then click **Save** to close the document and return to your sales document.

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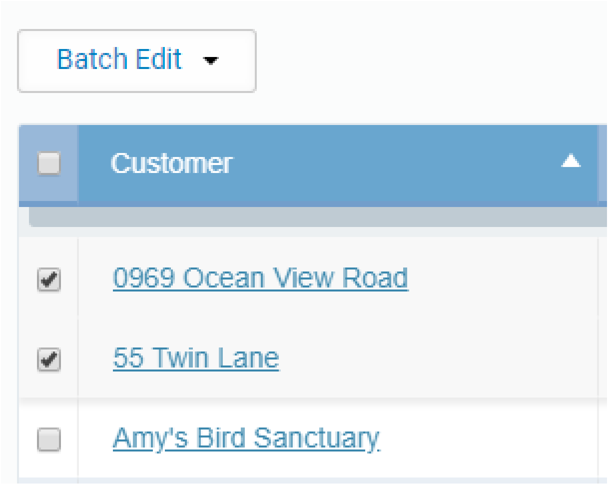
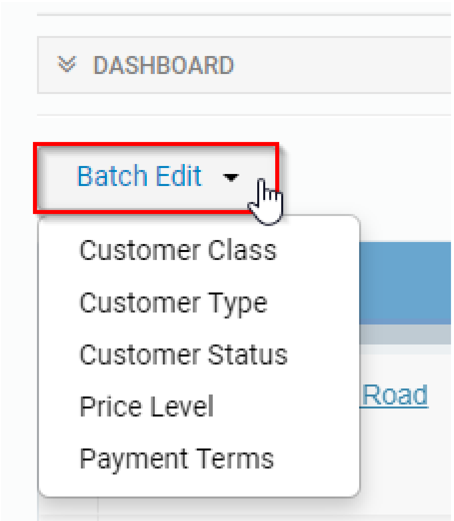
Using the Batch Edit Feature

SalesPad Cloud's Batch Edit feature can be used to edit Customer Class, Customer Type, Customer Status, Price Level, or Payment Terms on multiple customers.

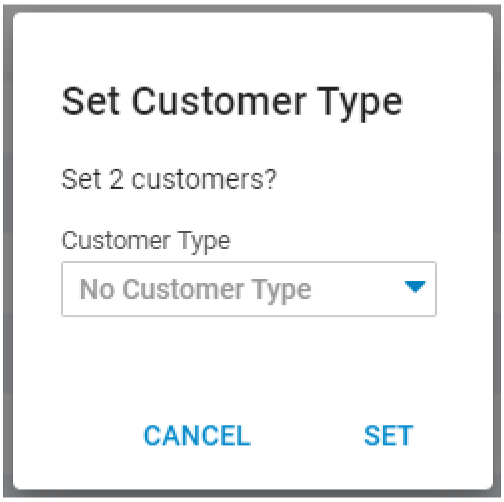
Select multiple customers on the Customer grid.



Click the **Batch Edit** dropdown and select the category you want to edit.



Make your changes in the corresponding window that appears. In this example, Customer Type was selected from the Batch Edit dropdown.



Click **Set** when you are finished making your changes, and the customers selected will be updated appropriately.

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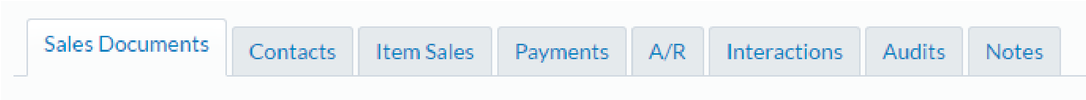
Customer Card Tabs

The bottom of the customer card contains tabs that utilize the following features: Sales Documents, Contacts, Item Sales, Payments, A/R, Interactions, Audits, and Notes. Additional tabs will be visible if certain integrations are enabled (Resources and PayFabric Wallet).



Note: Any grid that appears inside a tab is searchable and customizable just like your main Customer grid.

- Sales Documents Tab - Shows all sales documents associated with this customer
- Contacts Tab - Shows all contact people associated with this customer; click **New Contact** to add a contact, check the box next to an existing contact and click the **Set As** dropdown to assign that contact to another contact type
    - For a brief explanation of all the information fields in the New Contact drawer, click here:

New Contact

Contact Code - Provides a space for you to assign a contact code for this contact

Contact Person - Allows you to name this contact

Title - Allows you to give a title to this contact

First Name - Allows you to give a first name to this contact

Last Name - Allows you to give a last name to this contact

Company - Allows you to indicate a company associated with this contact

Tax Code - Assigns a tax code to this contact

Location - Indicates the Location used for this contact

Shipping Method - Indicates the Shipping Method used for this contact

Address Information fields - Address information for this contact

Contact Methods fields - Select a Contact Method Type from the first dropdown, enter pertinant information for this method in the middle field, and use the second dropdown to mark this contact method as Acceptable, Never, or Preferred

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- Item Sales Tab - Shows all item sales associated with this customer
- Payments Tab - Keeps a record of payments associated with this customer. See the Customer Payments section for more information on customer payments.
- A/R Tab - Provides visibility on key metrics for accounts receivable for this customer.
    - On Account is updated at the time of posting transactions, Open Amount is

recalced during integration syncs.

- Interactions Tab - Keeps a record of communication with this customer; click **New** to add an interaction
    - For a brief explanation of all the information fields in the Create Interaction drawer, click here:

Create Interaction

Subject - Allows you to give a subject line for this interaction

Notes - Provides a space to record notes on the interaction

Starts On - Indicates when the interaction starts

Ends On - Indicates when the interaction ends

All Day Event - Indicates whether or not the interaction is an all-day event

Remind On - Allows you to choose a date for a reminder from SalesPad Cloud (this appears as a notification in the upper right-hand corner of the screen)

Interaction Type - Assigns the interaction to an Interaction Type , such as Email, Phone, In-Person, etc.

Assigned To - Allows you to assign the interaction to a company user

Contact Person - Indicates the contact person for this interaction

Location - Indicates the location for this interaction

Completed On - Indicates the completion date

Is Complete - Indicates whether or not the interaction is complete

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- Audits Tab - Audits customer activity
- Notes Tab - Displays notes associated with this customer; you can add more notes by clicking in the notes field and typing your information
- Resources Tab - Displays and manages resources associated with this customer
- PayFabric Wallet Tab - Displays credit cards saved to this customer's PayFabric Wallet

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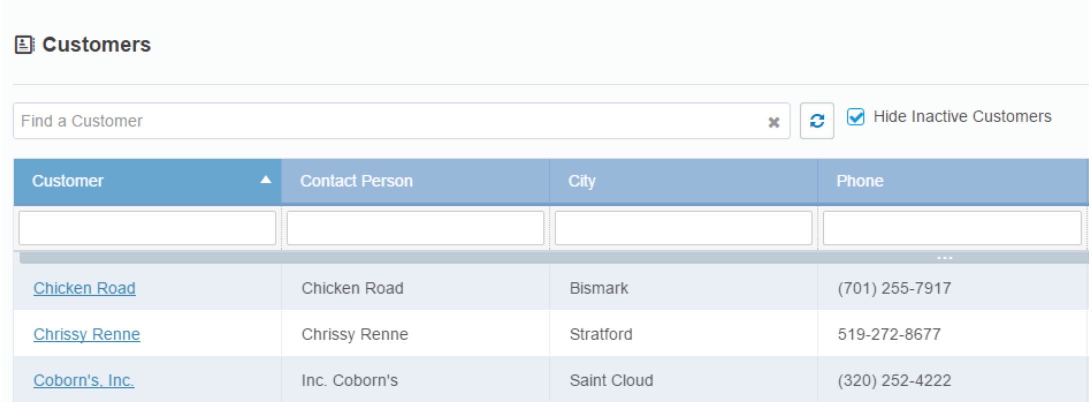
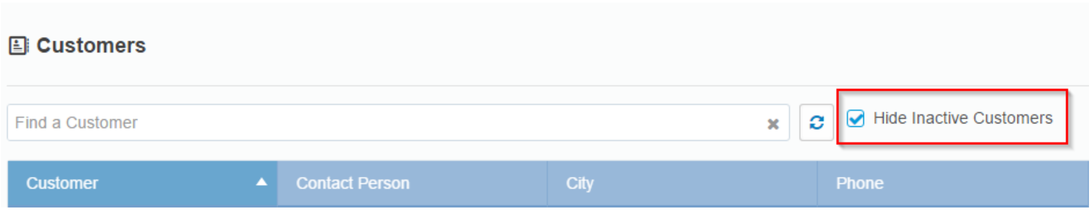
Search for a Customer

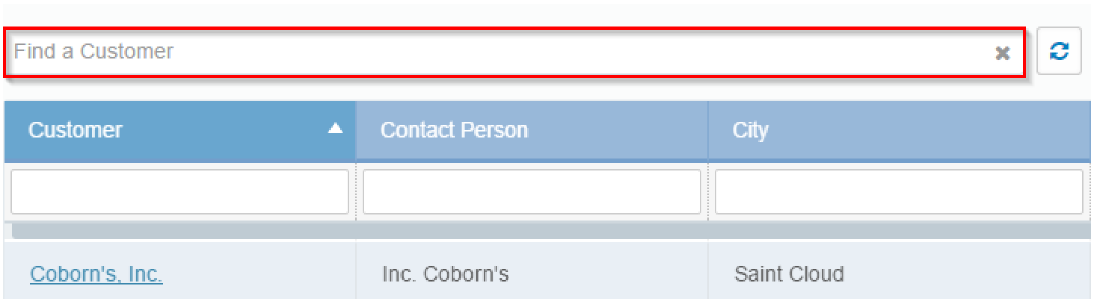
Once you’ve opened the Customers module, you will see a grid displaying your existing customers.



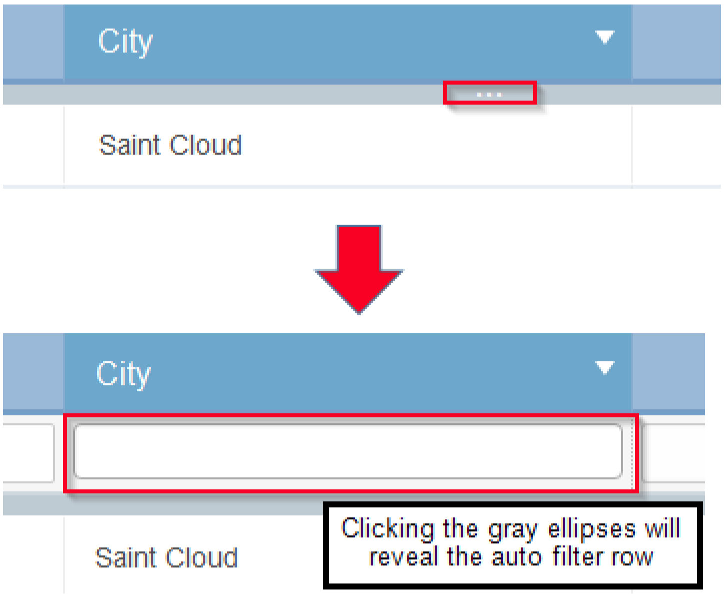
There are several ways to search for a customer. Before you begin your search, though, decide whether or not you want inactive customers to be displayed in your search results. Check the box just to the right of the search bar accordingly.



To search for a specific customer by name, simply type the name (or partial name, if you don't know the exact name) into the search bar located just above your grid.



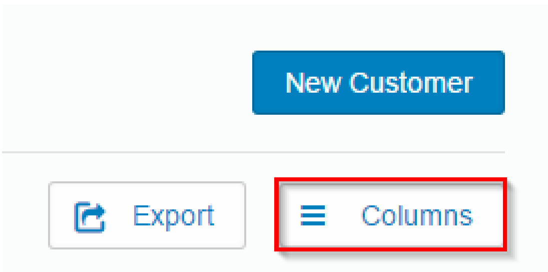
You can also search each column in your grid. To reveal the auto filter row for your columns, click the gray **ellipses** found just below the column headers.



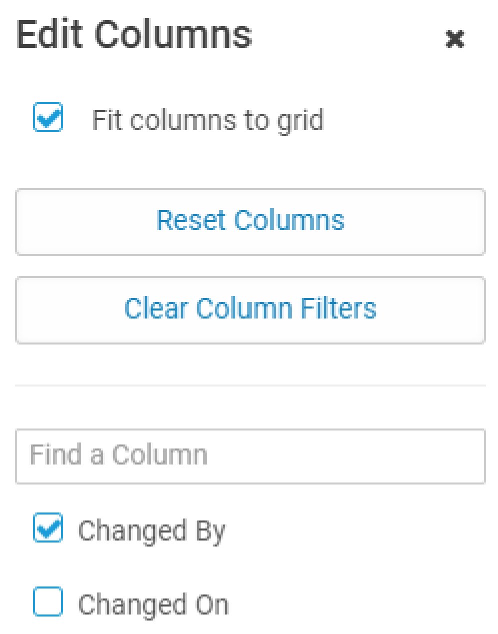
Enter your search criteria into whichever auto filter row is most useful for your particular search.

Certain customer columns, such as Balance, also offer dropdown options in the auto filter row.

If the column you'd like to search is not visible in your grid, click the **Columns** button in the upper right-hand side of the screen.



Clicking this button reveals the Edit Columns drawer. Check the boxes for columns you want visible and uncheck the boxes for those you'd rather not see.



The **Reset Columns** button in the Edit Columns drawer will restore your grid to its default view, and the **Clear Column Filters** button will clear any search criteria you have currently entered into the auto filter row.

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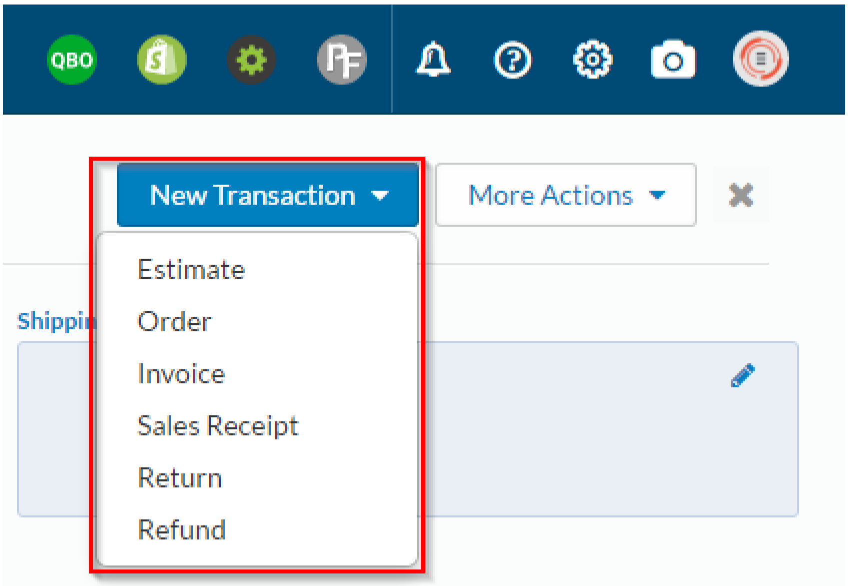
Create a New Transaction from the Customers Module

To create a sales document from the Customers module, open the customer card for customer you wish to create the transaction for, click **New Transaction** in the upper right-hand corner of the screen, and select from the list of Sales Document Types.



A sales document card will appear with customer information prepopulated. Continue filling out the sales document and procede with the transaction. To learn more about sales documents and transactions, please review the Sales module documentation.

Note: The sales document card saves automatically.

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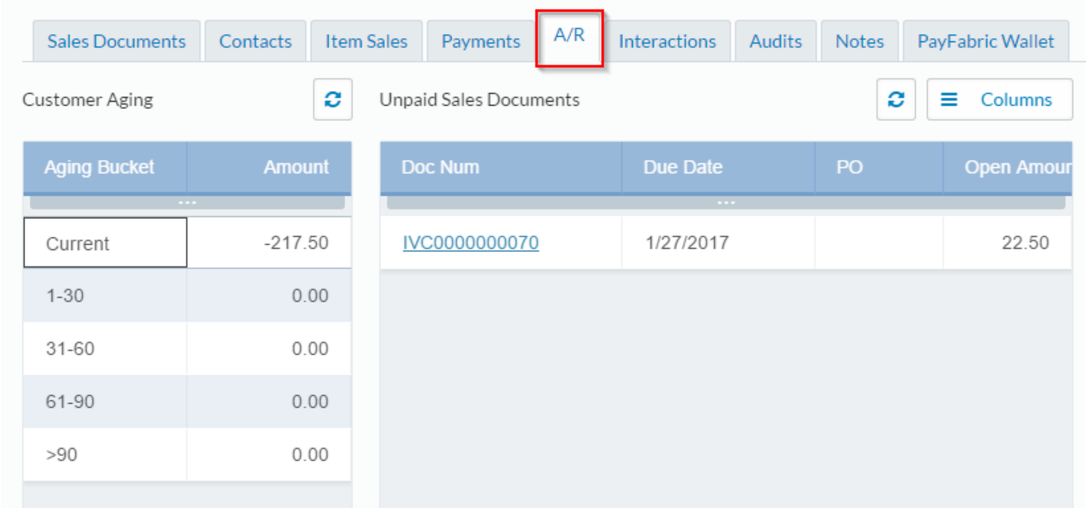
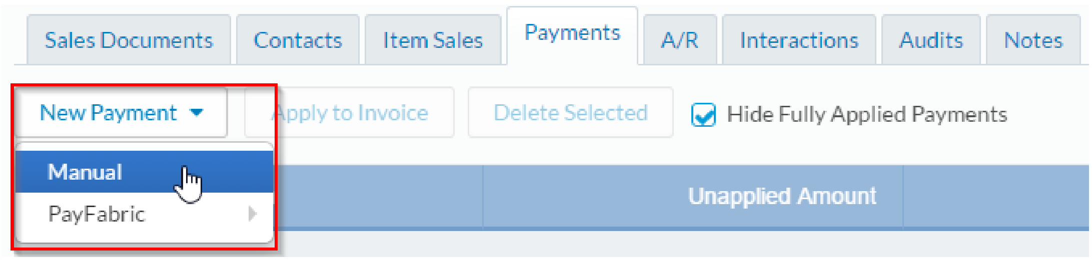
Customer Payments

Taking payments from customers is, of course, a vital component of doing business. SalesPad Cloud uses the Payments tab on the Customer card to make this a simple, seamless process that is easy to manage. Sales documents in the A/R (accounts receivable) stage of QuickBooks Online's accounting process are able to receive payments via SalesPad Cloud. These are documents that have been posted and are awaiting customer payments. For a quick view on sales document in A/R, open the A/R tab on the Customer card.

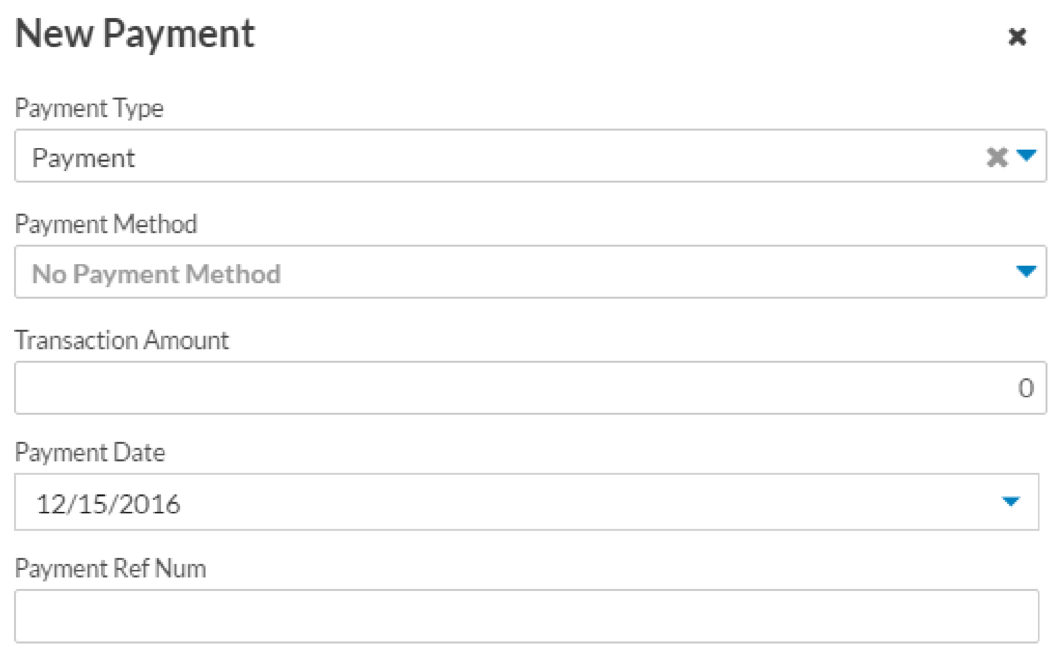
Note: On Account is updated at the time of posting transactions, Open Amount is recalced during integration syncs.



To record a payment from a customer, open the Payments tab and click the **New Payment** dropdown. Select Manual or PayFabric, depending on whether or not you are using the PayFabric integration to make this payment.



The New Payment drawer will appear.



For a brief explanation of each field in the New Payment drawer, click here:

New Payment

Payment Type - Allows you to choose between Payment and Credit payment types

Payment Method - Selects from Cash, Check, or Credit Card payment options

Transaction Amount - Allows you to enter the amount for the new payment

Payment Date - Indicates the date for the new payment

Payment Ref Num - Allows you to assign a reference number to the new payment

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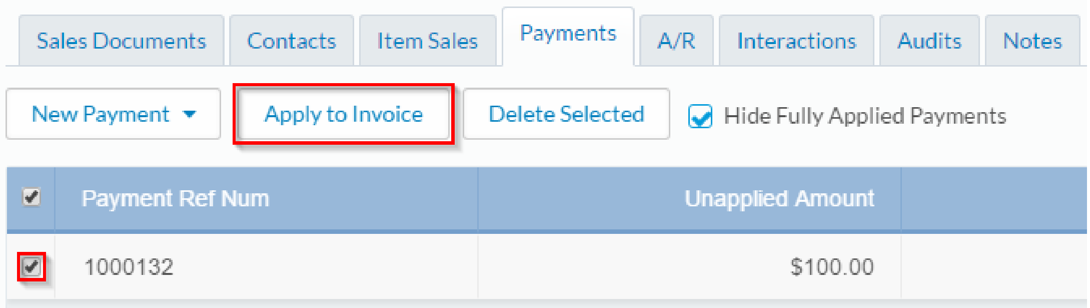
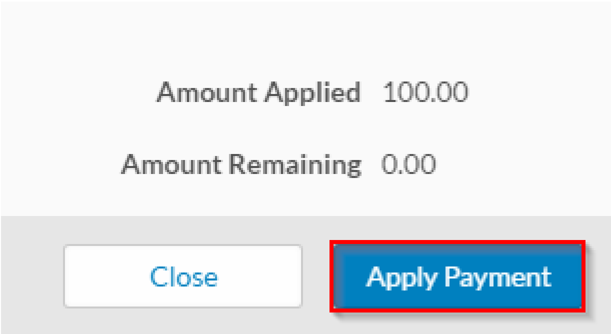
Fill out the information fields in the New Payment drawer and click **Save** when you're finished.

To create a credit on a customer's account, create a return and post it. For more information on creating a return, please reference the Create a Transaction section of our [Sales documentation](#).

To apply a customer payment (or credit) to a posted invoice, check the box next to the payment and click **Apply to Invoice**.



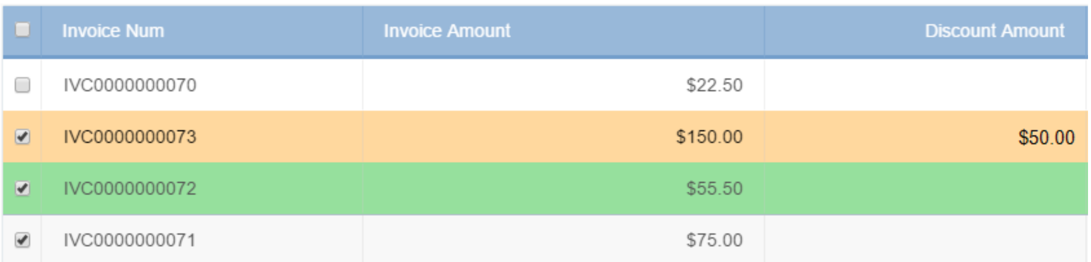
The Apply Payment to Invoice window will appear, displaying a list of open invoices for that customer. Select the invoice you wish to apply the payment toward and click **Apply Payment** in the lower right-hand corner of the screen.



To opt out of applying any [Payment Terms] discount, click on the Total Applied column and check the Apply Discount checkbox

To apply a payment to multiple invoices, check the boxes next to the invoice number in the order that you want to apply payments. If the payment will cover the entire invoice, that line will turn green. If the payment can only partially cover the invoice, the line will turn orange, and if there are not enough funds to cover any of the invoice, the line will stay the same color.

In the following screenshot, the third line was checked first, the second line was checked second, and the fourth line was checked last. The third line is green because the invoice is now paid in full, the second line is orange because it is only partially paid, and the fourth line is still white because there was not enough money left in the payment to cover any of this invoice. The second line also has a Payment Term associated with it, and the amount discounted is shown in the Discount Amount column.



Note: You can apply a payment to as many invoices as the payment will cover, but you cannot opt to pay only a portion of the payment on multiple invoices. For instance, if you had a customer payment of $100 that you wanted to use toward an invoice of $60 and another invoice of $70, you cannot opt to pay $50 on each. You must pay the full amount on the first invoice (assuming that the first invoice is the $60 invoice) and $40 on the second invoice.

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QuickBooks Online Integration Notes

For a complete summary of QuickBooks Online integration details, click here.

CUSTOMERS/ITEMS/VENDORS

SalesPad Cloud does not sync every customer, item, or vendor to QuickBooks Online. We only sync this data once the customer, item, or vendor appears on one of the transactions mentioned in this document. For example, a new customer that has been added to SalesPad Cloud will not sync to QuickBooks Online until a sales invoice or receipt has been posted for that customer.

PAYMENTS/DEPOSITS

Payments in SalesPad Cloud will be synced with QuickBooks Online when attached to a posted sales transaction, at which point they will be reflected on that sales transaction within QuickBooks Online. Deposits, when saved, will sync a journal entry to QuickBooks Online debiting the undeposited funds account and crediting the SalesPad Cloud deposit account (unless the setting has been changed to a different account in SalesPad Cloud). Once the sales transaction that the deposit is associated with has been posted, there will be an additional journal entry for the deposit that debits the deposit account and credits the receivables accounts.

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