Customer Card | SalesPad Desktop

Cavallo Support - 2025-06-05 - Video

This video discusses how to use the Customer Card feature in SalesPad GP for Microsoft Dynamics GP. The Customer Card is broken down into two main sections: the header and the tab section. The Customer Card contains all the information on file with a specific customer, including any documentation they have open. In addition to viewing existing documents, you can also create new ones. Additionally, there are interactions logs, customer notes, and A/R notes associated with the Customer Card.