SALESPAD®

SalesPad Mobile

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Per user, per device

SalesPad Mobile GP
Overview

SalesPad Mobile gives Microsoft® Dynamics GP and SalesPad users the power to man- age customers and contacts, view inventory, manage sales information, utilize Sales Monitor, as well as create and edit sales documents, all from the convenience of their iOS or Android device.

How it Works

Search for customers

• View details such as preferred addresses, trade discounts, and customer class

• View associated sales documents, AR balance, and account status

• View and add notes or CRM notes

• Manage contacts

• Search for contacts

• Call and email contacts directly from the application
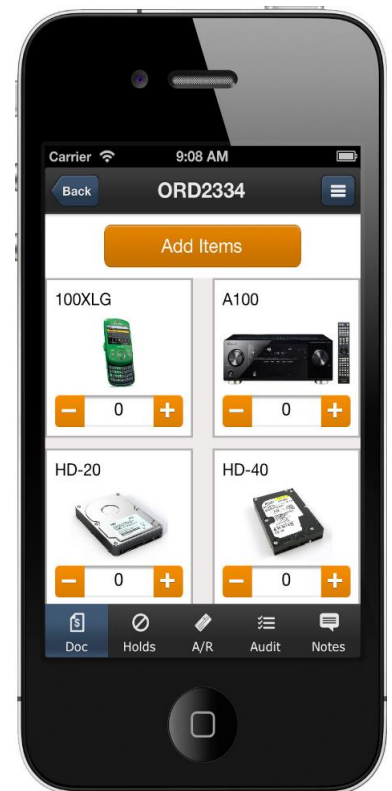
Sales Document Entry

• Create sales documents

• Edit existing sales documents

• Manage document fields and line items

• Template-based ordering

Inventory

• Search for inventory

• View item properties

• View associated sales documents and purchase orders

• View and add notes

• View quantities per warehouse

Sales Monitor

• View open sales documents categorized by workflow and batch or document type

• View document properties, notes, and line items

• View accounts receivable balances and account status

![SALESPAD® logo]

SalesPad Mobile

- Manage holds

- View and add sales document notes and associated customer CRM

- View sales document audit logs

Other Features

- View recently accessed documents, customers, items, and contacts through the built-in Quick Access menu

- Ability to "Favorite" most items in the application (such as customers, documents, items, and
contacts, and even search preferences)

- The Quick Access Menu provides application navigation, access to favorites, and recently viewed items

- Comprehensive security surrounding sensitive features and fields

- Email printable forms, including quote, order, and invoice