



SalesPad 3.6 Feature Summary

Searches

- Customer
- Sales Documents
- Inventory
- Previous purchases
- Alternate Item Catalog

Customer

- Create new Customers
- Add/Edit/Delete Contacts
- Create & edit Customer & Contact specific notes
- Sales Graph
- Sales history by Document
- Sales history by Item
- Unlimited custom fields

Sales Entry

- Quotes, Orders, Invoices, Returns
- Named Notes
- Inventory Lookup
- View previously purchased items
- Margin Summary (entire order)
- Unlimited custom fields on Sales Documents and Line Items
- Sales Document Audit Log

CRM

- Enter Tasks & Reminders
- Log customer notes and contacts
- Generate Call Lists
- Calendar View

Inventory Lookup

- Search by Item # and description
- View all locations at once
- View lots & serial numbers
- Hyperlink into Dynamics GP
- Create & Search alternate item database
- Convert non-inventory items
- Item Sales Graph

Workflow

- Route sales documents through your business processes
- Customer customizable workflow queues and rules
- Fulfill from multiple warehouse sites
- Document splitting

Purchasing

- Demand-based purchasing
- Summary & Detail views of items that need to be purchased
- Supports multiple buyers and purchase plans
- Generates Dynamics GP Purchase Orders
- Generate PO's directly from a Sales Document
- Consolidate demand from multiple Sales Documents on a single PO
- Print (and re-print) PO's
- Manage & edit linked PO's

Reporting

- Sales Analysis
- Quick Reports
- Customize all printed Sales & Purchasing Documents
- Dashboards

Security

- Define all Users and Groups
- Secure Individual Screens
- Secure Individual Tabs
- Restrict access to specific data (i.e. hide cost, margin)

Customization

- All grids save user preferences
- All grids printable & exportable
- Integrated Report Writer
- Custom Screens & Tabs available

System Management

- View active user connections
- View "locked" documents
- Automatic updates

SalesPad Mobile

All of the same great features as SalesPad 3.6 running on your mobile computer. You determine what data you want to take with you, synchronize it to your notebook computer, and you're ready to create quotes, orders, invoices, and returns; all while disconnected from your company network.