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Manage Organization

Megan De Freitas - 2025-06-10 - Settings

Overview

The Manage Organization feature of SalesPad Cloud is where you enter your billing information, invite users to your company, view billing history and subscription details, manage POS stations, and enter a partner code. Only organization owners are able to access the Manage Organization screen. If you do not see Manage Organization in the Settings menu, it is because you are not the organization owner.

For additional assistance with billing and subscription issues, please send an email to <u>accounting@cavallo.com</u>.

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Setup		Repor	rts		Oth	er				*
Location	Sales Document Type	Dynam	nic Grid	Reports	Inte	gratior	n Dashl	board		
Payment Terms	Sales Territory	Invent	ory Sto	ck Status	Inve	ntory F	Recond	iliatior	n i	
Price Level	Salesperson	Sales	Analysi	is	Sec	urity				
Price Lists	Shipping Method				Syst	tem Se	ttings			
Purchase Order Type	Tax Codes				Con	npany	Card			
1					Mar	nage O	rganiza	ation		
						-		Show /	All	

To get started, open the Settings menu and click Manage Organization.

Alternatively, select **Manage Organization** from the dropdown next to your organization name in the Select a Company screen.



Enter Billing Information

Once you've opened Manage Organization, make sure **Billing** is selected in the upper lefthand side of the screen.

÷	MANAGE ORGANIZATION	l.	
USERS	POS STATIONS	BILLING	ACTIONS

Fill out the billing information and click **Update** when you're finished.

illing Plancy Sales Pad	Cloud Pasis
Billing Plans: SalesPad	Cloud Basic
lling Information:	
First Name on Account	Last Name on Account
Angela	McFadden
Card Number	
1234 5678 9012 3456	
Current card on file: None	
CVV Expiration Date	
789 3 - Mar 🔻 2020	T
lling Address:	
Address 1	Address 2
123 Main Street	Suite 100
Billing Country	Billing State
United States	 Michigan
Billing City	Billing ZIP Code
Grand Rapids	49525
	Update
	Opuate

Sales tax is calculated based on the company address found in your QuickBooks Online account. If no address is listed, tax will be calculated based on the credit card billing address.

To the right of the billing information panel is your detailed transaction history with SalesPad Cloud. This history displays payments and the addition or subtraction of users and POS devices.

Find a Transaction	×				Columns
Payment For	Туре	Total	Payment Date	•	Success
Coupon	adjustment	-\$49.21	7/25/2017		8
SalesPad Cloud: 11 to 12 Users	charge	\$49.21	7/25/2017		
Coupon	adjustment	-\$137.37	7/24/2017		
SalesPad POS: 0 to 4 POS Devices	charge	\$137.37	7/24/2017		
Coupon	adjustment	-\$55.57	7/24/2017		
SalesPad Cloud: 9 to 10 Users	charge	\$55.57	7/24/2017		
Coupon	adjustment	-\$56.36	7/17/2017		
SalesPad Cloud: 8 to 9 Users	charge	\$56.36	7/17/2017		
Coupon	adjustment	-\$14.27	6/12/2017		

For a quick view of your current subscription details, including any POS Stations tied to your subscription, click the Monthly Subscription dropdown in the upper right-hand corner.

Your subscription will be renewed on 08/20/2016.				
Monthly Total:	\$801.00			
Enter Coupon Code	ADD			
POS STATIONS 0 @ \$49.00	\$0.00			
USER SEATS 9 @ \$89.00	\$801.00			
Monthly Subscription DETAILS BELOW	•			

Add Users

A user seat grants company access to the user invited to that seat. Your SalesPad Cloud monthly subscription cost increases with each additional user seat, and billing starts immediately, even if the seat remains empty. You will be charged a prorated amount based on your next billing date.

Select **Users** from the upper left-hand side of the Manage Organization screen.



To add a user seat, click either the **Add User** button in the upper right-hand side of the screen.

÷	MANAGE ORGANIZATION	N	
USERS	POS STATIONS	BILLING	ACTIONS
	+ _ ADD U	JSER	
Find a U	ser		×

Enter the email address of the user you wish to invite in the Add User drawer that appears. Next, grant your invitee access to companies and assign them to a Security Group for each company they are invited to.

Add User

User Information

Email Address* email@example.com		Confirm Email Address* email@example.com				
User Company Acces	s					
No Company	Ŧ	No Security *	Ŧ	Θ		
No Company	Ŧ	No Security *	Ŧ	e		

Click **Save** when you're finished.

If the user you invited is new to SalesPad Cloud, they will receive a welcome email with further instructions. If the user already uses SalesPad Cloud, they will simply see that they now have access to your company the next time that they log in to SalesPad Cloud.

An organization owner can invite users to all of his or her companies from the Manage Organization screen of any company they own. For example, if an owner was in the Manage Organization screen for Company A, but wanted to invite a user to Company B, she could go to Company A's Manage Organization screen and do it from there; there is no need to switch to Company B to invite the user.

Note: Changes to your monthly subscription rate are not final until you click the link in the green bar that appears at the top of the page.



Edit Users

A list of active and pending users is on the left-hand side of the screen. To revoke a pending invitation, simply click the back arrow next to the invitee's email address.

ADD ANOTHER COMPANY

USERS	BILLING	ACTIONS	
	+ <u>=</u> A	DD USER	
Find a User			×
▼ Pendir	ng		
• user.one@	@salespad.net		5
 Active 			
user.two@)salespad.net		
user.three	@salespad.net		
user.four@	@salespad.net		
user.five@	@salespad.net		

Click on any user to modify their company access and security groups in the fields to the left.

★≛ADD USER		
Find a User 🗙	user.two@salespad.net	
✓ Pending		
• user.one@salespad.net	Find a Company 36	ADD COMPANIES
✓ Active	SAMPLE COMPANY SECOND	RITY GROUP 👻 🖨
user.two@salespad.net		
user.three@salespad.net		
user.four@salespad.net		
user.five@salespad.net		

To change a user's security group, click the **Security Group** dropdown in the appropriate company. To remove a company from a user's account, click the minus icon on the far right. To add additional companies to a user's account, click the **Add Companies** button above the list of current companies.

	ADD COM	PANIES
SECURITY GROUP	•	•

Remove or Suspend Users

To remove or suspend a user, click the ellipses in the upper right-hand corner and choose the appropriate option.

Monthly Subscription SEE DETAILS		•
	Active	•
	User seat op	tions

Removing a user affects your monthly subscription rate on the next billing cycle. In the interim, however, that user's "seat" is considered available. So, for example, if you remove User One on the 15th and add User Two on the 20th, but your billing cycle starts on the 30th, you will not receive a pro-rated rate for User Two because User One's "seat" had not yet been removed from your account.

Suspending a user temporarily removes the user from the company. For example, if an employee needed to take a few months off for maternity leave, you could simply suspend that user from your company rather than remove them. That way, when the employee is ready to begin using SalesPad Cloud again, you don't have to re-invite them, you simply have to switch them back to active user status. When a user is suspended, you are not charged for their seat, and your monthly subscription rate is adjusted accordingly.

When you remove or suspend a user, a red or orange icon will appear beside their email in the Pending section of the user list on the left-hand side of the Manage Organization module. To remove a suspension or undo a removal, click the back arrow next to that user's email address.

+_ADD USER	
Find a User	×
 Pending 	
user.one@salespad.net	5
user.two@salespad.net	ĥ
 Active 	
user.three@salespad.net	
user.four@salespad.net	
user.five@salespad.net	

Note: Changes to your monthly subscription rate are not final until you click the link in the green bar that appears at the top of the page.

You have pending changes to your subscription. Click here to confirm your changes.

Add Partner Code

If you have a partner code you need to add to your SalesPad account, click on **Actions** in the upper left-hand corner.



Click the **Update Partner** button.

÷	MANAGE ORGANIZATION		
USERS	POS STATIONS	BILLING	ACTIONS
	TE PARTNER		

Enter the partner code into the pop-up that appears and click **Confirm**.

Update Partner		
Please enter the code g	given to you to update y	our partner.
Partner Code		
	CANCEL	UPDATE
	CANCEL	OFDATE

Purchase Additional Services

To purchase an integration, an implementation package, or additional implementation hours, click on **Additional Services** in the upper left-hand corner.



Click the **Add** button beneath the integration or implementation package you wish to purchase, or enter the extra implementation hours you want to purchase, then click the **Add** button. In the screenshot below, the customer has added SalesPad Bacode, the Stratus implementation package, plus two additional implementation hours.

let oulest du be ye	ur trusty sidekick.	Stratus	Cumulus	Cirrus
he Goose to your Maver	ick.			
ver the last decade, SalesPad h ings with over 2,000 successfu		\$350.00 (one time fee)	\$800.00 (one time fee)	\$3,000.00 (one time fee)
	also ERP experts, making us the	Free with prepaid year subscription	50% off with prepaid year subscription	10% off with prepaid year subscription
fter all, implementation is more	e than just understanding how to setting up your operations and	Designed for businesses familiar with inventory best practices and looking to get up and running quickly, the Stratus package employs 4 hours, spread out over four meetings, to	Best for businesses interested in a deeper dive into their business processes and the software itself, t Cumulus package employs 10 hour spread out over seven or more	 employs 30 hours for in-depth setu and training. It is best for business
eed assistance choosing an in ill out this form to get in touch to pecialist will get back to you sh ackages, and answer any quest	with us. A cloud Success ortly, walk you through the	import your data, fine tune your settings, users, and securities, and provide basic product training. If you consider yourself a whiz kid once you've been shown the basics, this package is built for you.	meetings, to implement the basics and further go in-depth into workflows, the report designer, and other advanced product training. If you are looking to get the most out SalesPad Cloud, this package is for you.	of work with you to build a unique of implementation and training plan t
Read the FAQ		Must currently be using QuickBooks Online.	you. Must currently be using QuickBooks Online.	
		✓ Business process review	 Business process review 	If you are using a system other than OuickBooks Online, such as
A la carte options		 Integrate Cloud to QuickBooks and import data 	 Integrate Cloud to QuickBook and import data 	QuickBooks Enterprise, or you want
MORT DONUS NOURS TO INTE lloted hours for the à la carte o eed to be increased based on c		 Basic company setup Settings Security Users Initial Setup 	 Basic company setup Settings Security Users Initial Setu 	work with your pre-existing ProAdv or other third-party consultant, the Cirrus package is required.
SalesPad	Cloud Barcode	 Basic product training 	 Basic product training 	
counts, and f	justments, transfers, stock ulfillment from the convenience rice. (+4 hours)		 Workflow discovery and setu Report designer training for 	p
Rem	ove		 printed forms Advanced product training Customized training for your unique 	
PavFabric			processes	
Nodus PayFa	bric is a safe and secure way of ayments and storing card	Remove	Add	Add
information.				
	d			
information.		Need more assistance?	er hour. You	Add

Once you've finished selecting the additional services you wish to purchase, click the prompt in the green ribbon at the top of your screen to proceed to checkout.



Follow the onscreen prompts to proceed with your order.