



Manage Organization

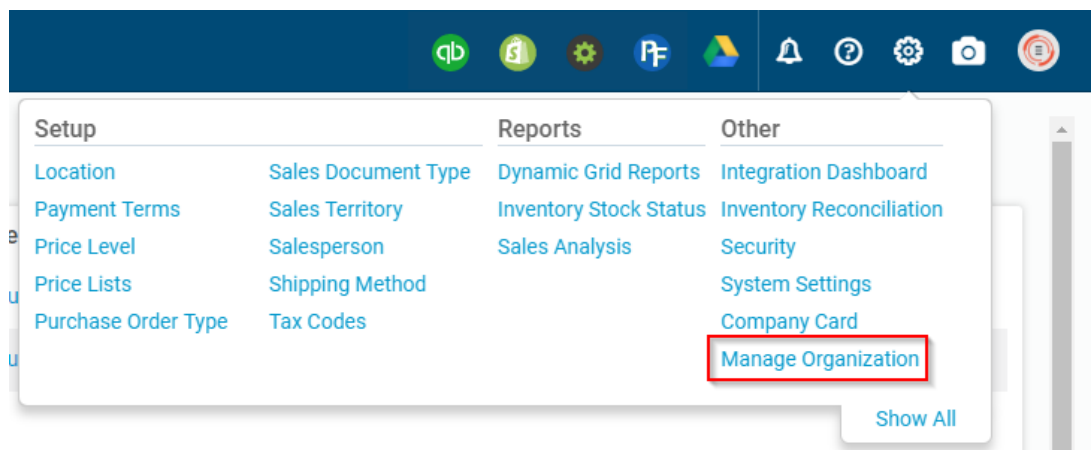
Megan De Freitas - 2024-12-02 - Settings

Overview

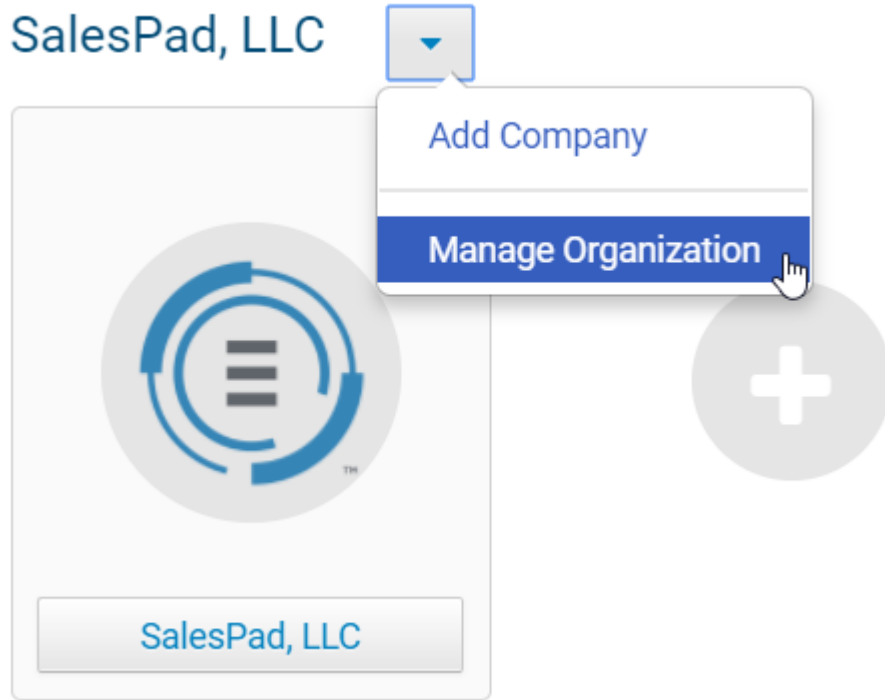
The Manage Organization feature of SalesPad Cloud is where you enter your billing information, invite users to your company, view billing history and subscription details, manage POS stations, and enter a partner code. Only organization owners are able to access the Manage Organization screen. If you 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 accounting@cavallo.com.

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.

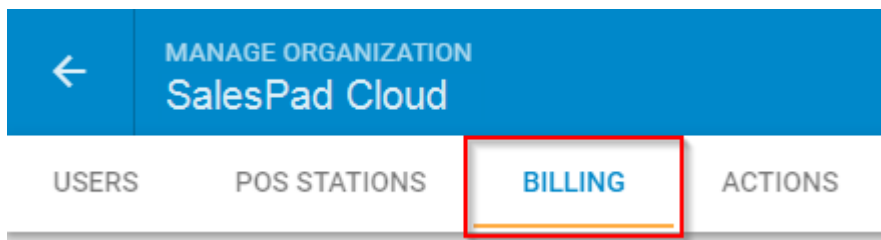


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Enter Billing Information

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




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

SalesPad

Billing Plans: SalesPad Cloud Basic

Billing Information:

First Name on Account	Last Name on Account 
<input type="text" value="Angela"/>	<input type="text" value="McFadden"/>
Card Number	
<input type="text" value="1234 5678 9012 3456"/>	
Current card on file: None	
CVW	Expiration Date
<input type="text" value="789"/>	<input type="text" value="3 - Mar"/> <input type="text" value="2020"/>

Billing Address:

Address 1	Address 2
<input type="text" value="123 Main Street"/>	<input type="text" value="Suite 100"/>
Billing Country	Billing State
<input type="text" value="United States"/>	<input type="text" value="Michigan"/>
Billing City	Billing ZIP Code
<input type="text" value="Grand Rapids"/>	<input type="text" value="49525"/>

Update

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.

Payment For	Type	Total	Payment Date	Success
Coupon	adjustment	-\$49.21	7/25/2017	<input checked="" type="checkbox"/>
SalesPad Cloud: 11 to 12 Users	charge	\$49.21	7/25/2017	<input checked="" type="checkbox"/>
Coupon	adjustment	-\$137.37	7/24/2017	<input checked="" type="checkbox"/>
SalesPad POS: 0 to 4 POS Devices	charge	\$137.37	7/24/2017	<input checked="" type="checkbox"/>
Coupon	adjustment	-\$55.57	7/24/2017	<input checked="" type="checkbox"/>
SalesPad Cloud: 9 to 10 Users	charge	\$55.57	7/24/2017	<input checked="" type="checkbox"/>
Coupon	adjustment	-\$56.36	7/17/2017	<input checked="" type="checkbox"/>
SalesPad Cloud: 8 to 9 Users	charge	\$56.36	7/17/2017	<input checked="" type="checkbox"/>
Coupon	adjustment	-\$14.27	6/12/2017	<input checked="" type="checkbox"/>

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.

Monthly Subscription

DETAILS BELOW ▲

USER SEATS

9 @ \$89.00

\$801.00

POS STATIONS

0 @ \$49.00

\$0.00

Enter Coupon Code

ADD

Monthly Total: \$801.00

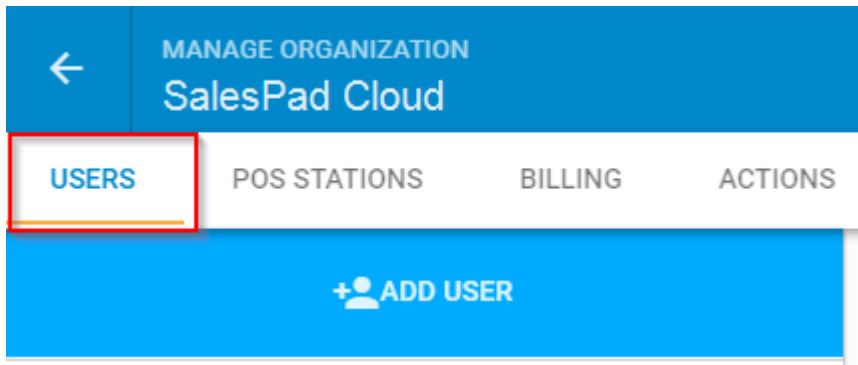
Your subscription will be renewed on 08/20/2016.

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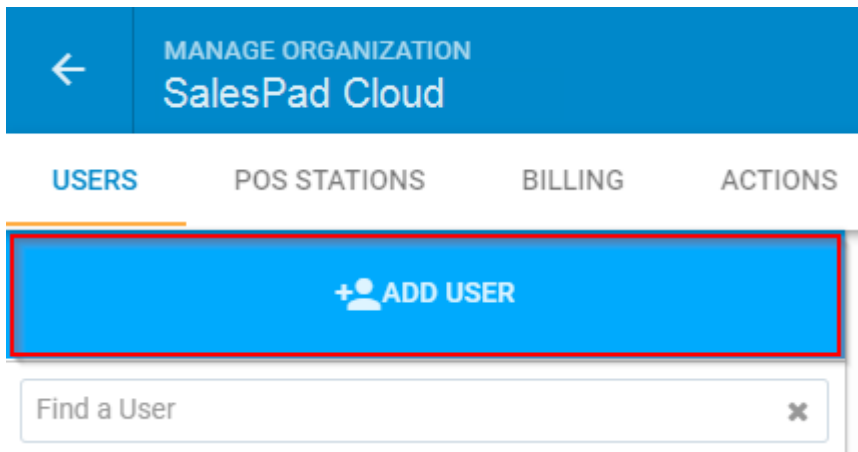
Add Users

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.



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 Access

No Company



No Security *



ADD ANOTHER COMPANY

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.

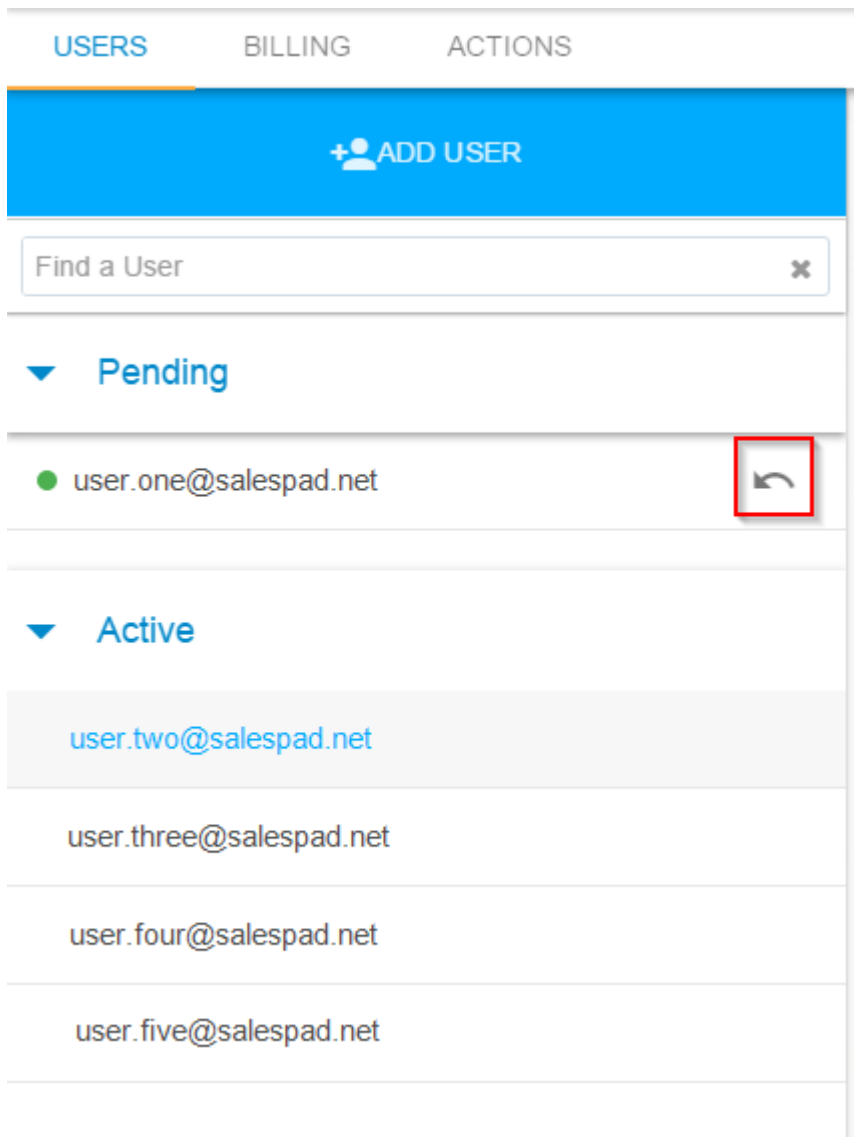
Note: Changes to your monthly subscription rate are not final until you click the link in the green bar that appears at the top of the page.

You have pending changes to your subscription. [Click here to confirm your changes.](#)

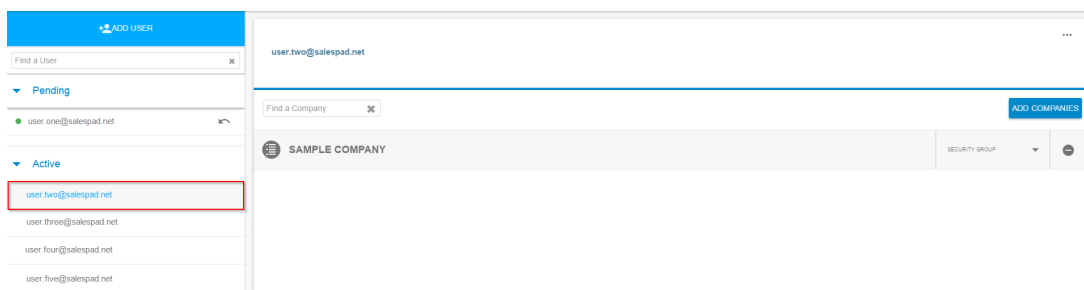
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Edit Users

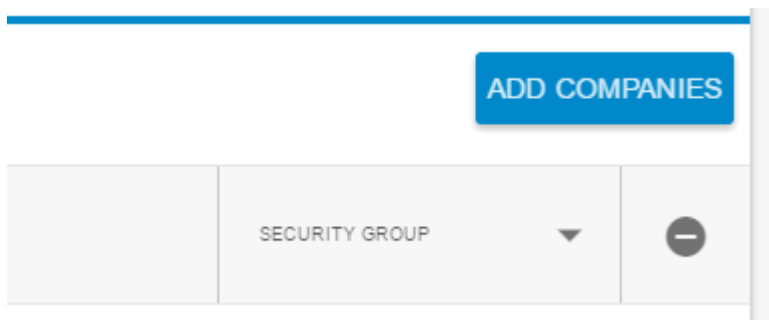
A list of active and pending users is on the left-hand side of the screen. To revoke a pending invitation, simply click the back arrow next to the invitee's email address.



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



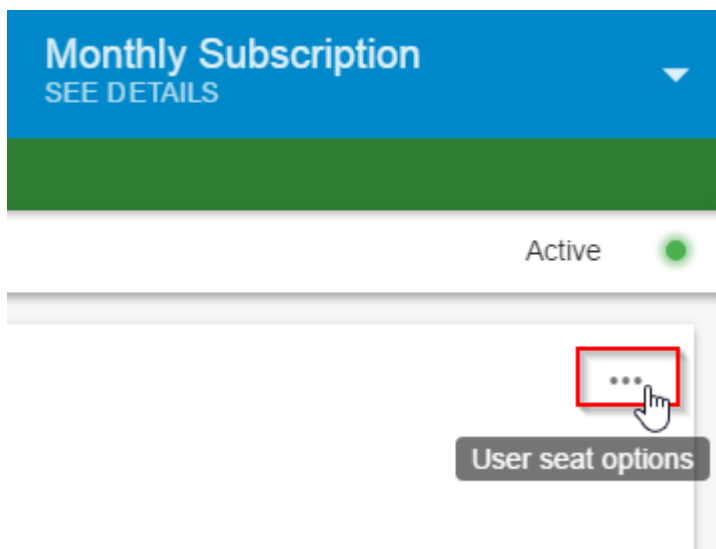
To change a user's security group, click the **Security Group** dropdown in the appropriate company. To remove a company from a user's account, click the minus icon on the far right. To add additional companies to a user's account, click the **Add Companies** button above the list of current companies.



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Remove or Suspend Users


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




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.



Find a User 

▼ Pending

-  user.one@salespad.net 
-  user.two@salespad.net 

▼ 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.](#)

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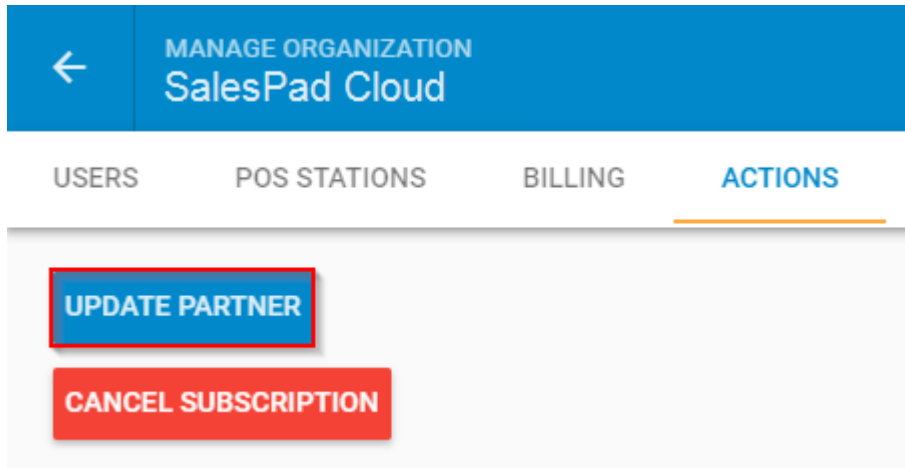
Add Partner Code

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

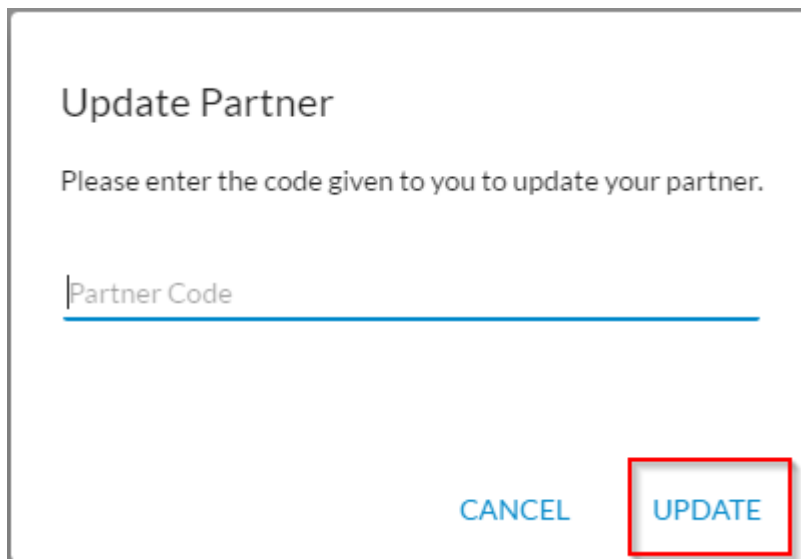
 **MANAGE ORGANIZATION**
SalesPad Cloud

USERS POS STATIONS BILLING **ACTIONS**

Click the **Update Partner** button.



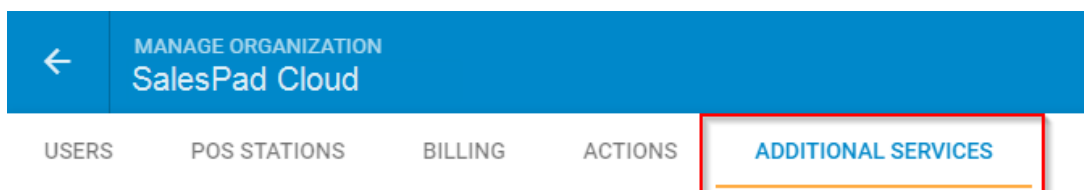
Enter the partner code into the pop-up that appears and click **Confirm**.



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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 Barcode, the Stratus implementation package, plus two additional implementation hours.

Let SalesPad be your trusty sidekick.
 The Goose to your Maverick.

Over the last decade, SalesPad has earned our onboarding wings with over 2,000 successful implementations, spanning more than 100,000 hours total.

We're not just developers. We're also ERP experts, making us the missing half of your dynamic duo.

After all, implementation is more than just understanding how to use the software. It's also about setting up your operations and employees for success.

Need assistance choosing an implementation package?
[Fill out this form](#) to get in touch with us. A cloud Success Specialist will get back to you shortly, walk you through the packages, and answer any questions.

[Read the FAQ](#)

À la carte options
 Order bonus hours to integrate your favorite apps. Alloted hours for the à la carte options are estimates and may need to be increased based on complexity of the integration.

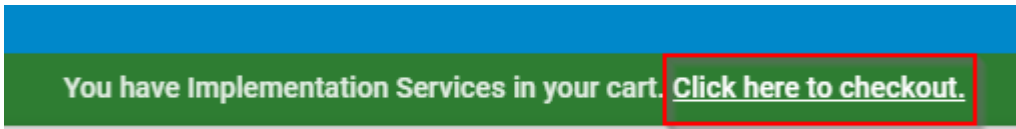
- SalesPad Cloud Barcode**
 Receiving, adjustments, transfers, stock counts, and fulfillment from the convenience of an iOS device. (+4 hours)
[Remove](#)
- PayFabric**
 Nodus PayFabric is a safe and secure way of processing payments and storing card information. (+2 hours)
[Add](#)
- ShipStation**
 Ship orders with 30+ carriers and send valuable shipping information between both systems. (+2 hours)
[Add](#)

Stratus	Cumulus	Cirrus
\$350.00 (one time fee) Free with prepaid year subscription 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 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. <i>Must currently be using QuickBooks Online.</i>	\$800.00 (one time fee) 50% off with prepaid year subscription Best for businesses interested in a deeper dive into their business processes and the software itself, the Cumulus package employs 10 hours, spread out over seven or more 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 of SalesPad Cloud, this package is for you. <i>Must currently be using QuickBooks Online.</i>	\$3,000.00 (one time fee) 10% off with prepaid year subscription The Cirrus package is a fully customizable, project-based implementation package that employs 30 hours for in-depth setup and training. It is best for businesses that are looking to switch from other systems and/or have complex needs. A SalesPad Cloud Consultant will work with you to build a unique implementation and training plan that fits your business plans.
<ul style="list-style-type: none"> ✓ Business process review ✓ Integrate Cloud to QuickBooks and import data ✓ Basic company setup (Settings Security Users Initial Setup) ✓ Basic product training 	<ul style="list-style-type: none"> ✓ Business process review ✓ Integrate Cloud to QuickBooks and import data ✓ Basic company setup (Settings Security Users Initial Setup) ✓ Basic product training ✓ Workflow discovery and setup ✓ Report designer training for printed forms ✓ Advanced product training (Customized training for your unique processes) 	<i>If you are using a system other than QuickBooks Online, such as QuickBooks Enterprise, or you want to work with your pre-existing ProAdvisor or other third-party consultant, the Cirrus package is required.</i>
Remove	Add	Add

Need more assistance?
 Implementation hours are \$100.00 per hour. You must purchase an implementation package before buying additional implementation hours.

▼ 2 ▲
 Extra Hours [Add](#)
 2 hours added

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.

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