Manage Organization

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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.

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.

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.

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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.

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.

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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.

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.

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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.

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

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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