Mobile Sales Document Signatures

Product Development - 2026-11-10 - Sales Documents

Overview

Easily capture signatures for sales documents in SalesPad Mobile via the touch screen on your mobile device. View existing signatures on sales documents and update them as needed.

This feature set is available as of SalesPad Mobile version 1.6.0.

Setup

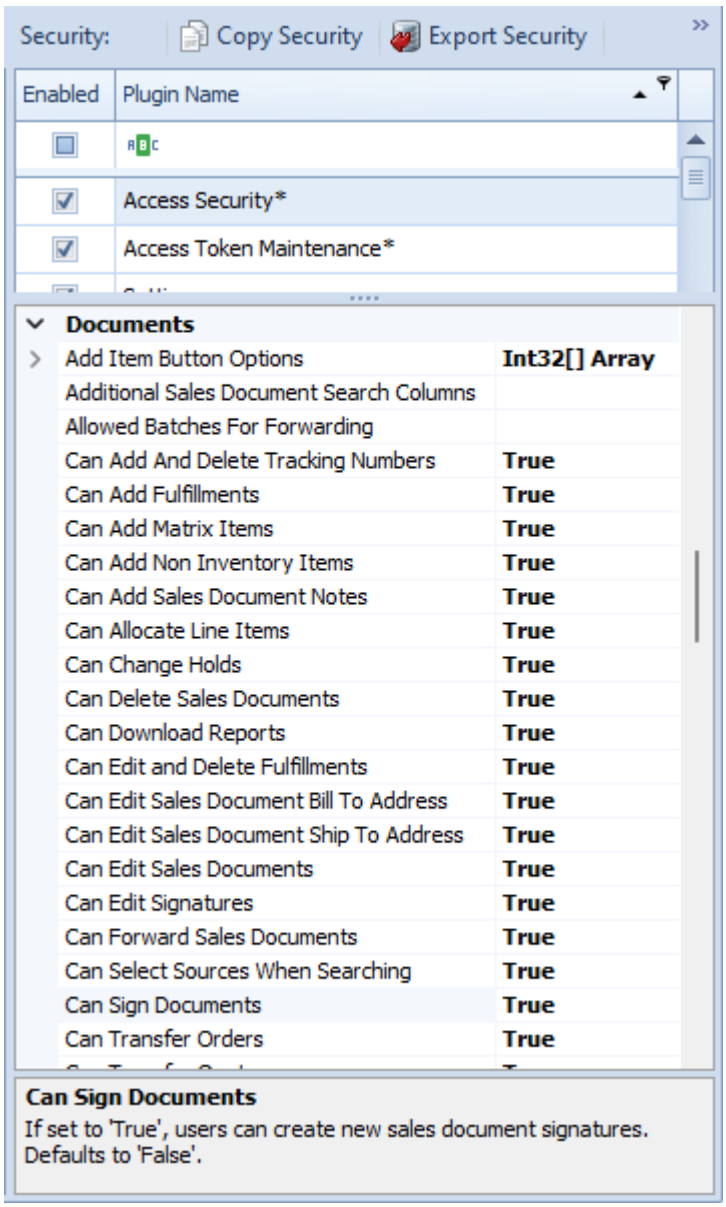
Securities

SalesPad Mobile Server has security settings for signatures within the Access Security plugin's Documents category. The first two are the most important because they control whether signatures can be created and edited.

Can Sign Documents - If set to 'True', users can create new sales document signatures. Defaults to 'False'.

Can Edit Signatures - If set to 'True', users can edit existing sales document signatures. Defaults to 'False'.

Signature Required Document IDs - A list of Document IDs which require at least one signature before saving. Defaults to nothing.



Settings

SalesPad Mobile Server has settings which affect signature capabilities in the mobile app. Sales document signatures can be reviewed and captured even in offline mode, but this requires certain settings to be enabled.

Printing

Print Signature On Receipt - If set to ‘True’, when printing a receipt with a Zebra printer, the signature for the document will be printed at the bottom. If a sales document has multiple signatures, it will print the first signature entered. Defaults to ‘False’.

Sales

Preload Sales Document Signatures - If set to ‘True’, the app will start loading sales document signatures as soon as the sales document is opened. If set to ‘False’, the app won’t load the full signatures until they’re needed, but will still preload some signature information ahead of time such as whether or not the sales document has any signatures. Defaults to ‘True’.

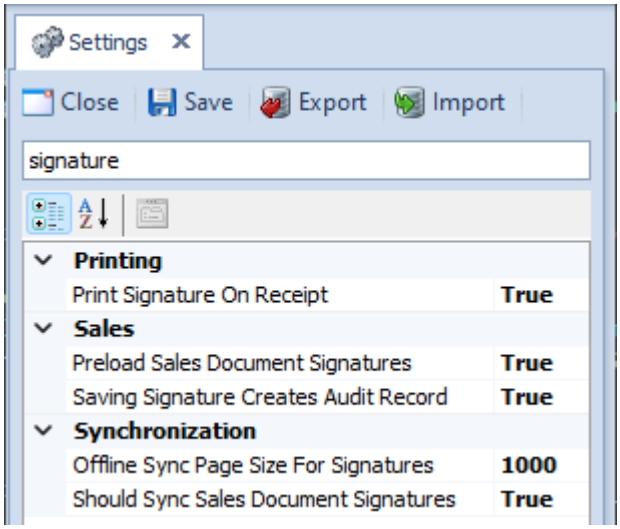
Saving Signature Creates Audit Record - If set to ‘True’, saving a signature on a sales document will create an audit record with a description of the date and time that the signature was saved. Defaults to ‘False’.

Synchronization

Offline Sync Page Size For Signatures - The number of signatures which should be loaded at a time when

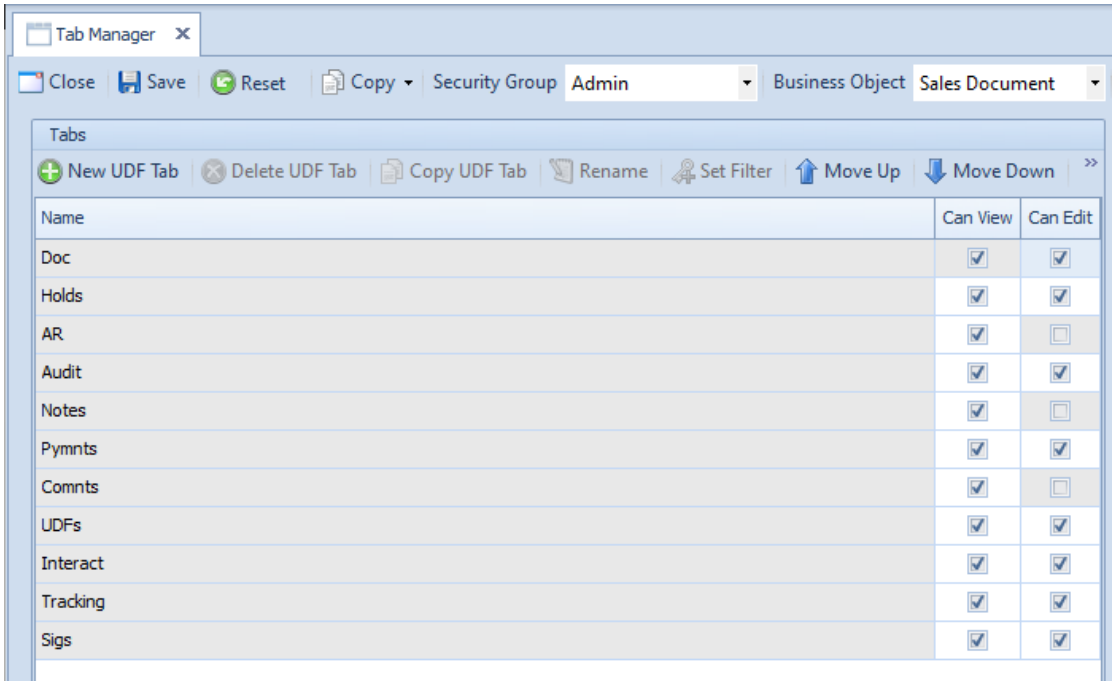
synchronizing signatures to offline mode. If connectivity issues occur, a smaller page size should be used. Defaults to '1000'.

Should Sync Sales Document Signatures - If set to 'True', the app will load sales document signatures while in offline mode. This will significantly increase the size of the database. This setting has no effect on whether signatures entered in offline mode are synchronized when returning to online mode. Defaults to 'False'.



Tab Manager

Sales documents have a Signatures tab which admins can enable in the Tab Manager. The tab's name is abbreviated to "Sigs" due to size restraints on smaller devices. To enable the Signatures tab for a security group, select that security group from the Security Group dropdown, select Sales Document from the Business Object dropdown, and enable Can View for the Sigs tab.



Note that the Can Edit column controls whether the tab can be viewed while the selected business object is in edit mode. Users can edit signatures outside of edit mode, so the Can Edit column does not actually control whether signatures are editable.

Signature Reasons

By default, a sales document can only have one signature. If a sales document's Doc ID has any configured signature reasons, then that sales document can have one signature for each signature reason. This configuration comes from SalesPad's Signature Setup tab. See this documentation for additional information on

how to use the Signature Setup tab.

SalesPad View Patch

If a sales document has at least one mobile signature and its Doc ID has signature reasons, SalesPad's Signature Pad plugin might display duplicate signatures even though the signatures were saved correctly in the database. This issue was fixed in SalesPad version 5.6.5 via a change to a SQL view. This fix can be applied to older SalesPad versions by running the following SQL. Please do not run this SQL if your SalesPad version is 5.6.5 or newer, because it could override future changes to the sales document signatures view.

```
ALTER VIEW spvSalesDocumentSignature

AS

SELECT sds.[SignatureID]

   ,sds.[Sales_Doc_Type]

   ,sds.[Sales_Doc_Num]

   ,sds.[Signature]

   ,sds.[Signature_Image]

   ,sds.[Is_Mobile_Signature]

   ,sds.[Signature_Setup_ID]

   ,ss.[Signature_Form]

   ,[Signature_Reason] = CASE

      WHEN ss.[Signature_Reason] IS NOT NULL

         THEN ss.[Signature_Reason]

      WHEN sds.[Is_Mobile_Signature] = 1

         THEN '(Mobile Signature)'

      ELSE NULL

      END

   ,ss.[Doc_ID]

   ,ss.[ID]

   ,ss.[Doc_Type]

   ,ss.[Obsolete]

FROM [dbo].[spSalesDocumentSignature](NOLOCK) AS sds

LEFT JOIN [dbo].[spSignatureSetup](NOLOCK) AS ss ON (

      ss.BO_Type = 'SalesDocument'

      AND ss.ID = sds.Signature_Setup_ID

      )


UNION ALL


SELECT [SignatureID] = NULL

   ,[Sales_Doc_Type] = NULL
```

```
    ,[Sales_Doc_Num] = NULL

    ,[Signature] = NULL

    ,[Signature_Image] = NULL

    ,[Is_Mobile_Signature] = NULL

    ,[Signature_Setup_ID] = NULL

    ,ss.[Signature_Form]

    ,ss.[Signature_Reason]

    ,ss.[Doc_ID]

    ,ss.[ID]

    ,ss.[Doc_Type]

    ,ss.[Obsolete]

FROM [dbo].[spSignatureSetup](NOLOCK) AS ss

WHERE ss.BO_Type = 'SalesDocument'

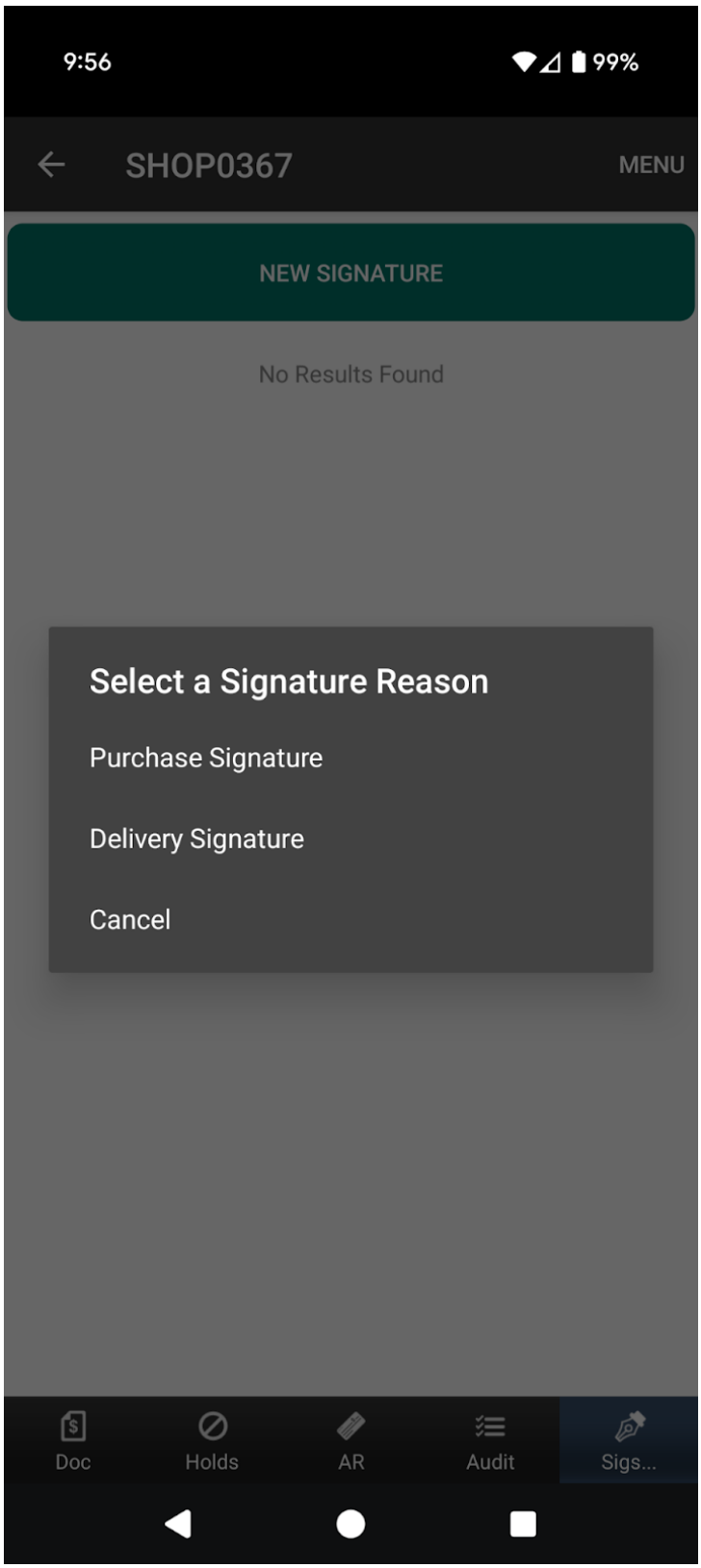
    AND ss.Obsolete = 0
```

Usage

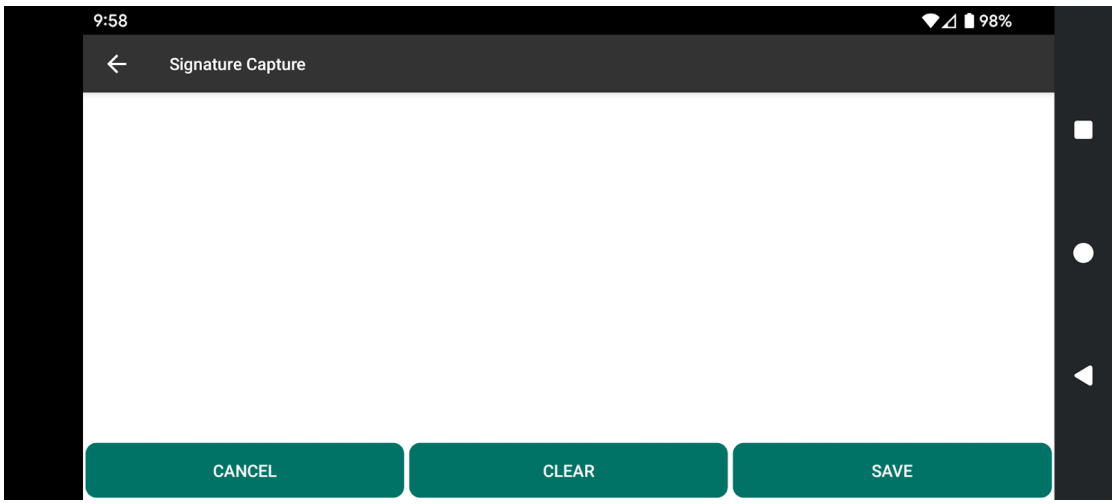
Users can view, create, and edit signatures via the Signatures tab on sales documents. Users can also create and edit signatures via the Menu.

Create New Signature

To create a signature, either tap the New Signature button on the Signatures tab, or tap the Sign Document option from the mobile app’s Menu. If the sales document’s Doc ID has any signature reasons, the app will ask which signature reason to use for the new signature. Only signature reasons for which the sales document does not already have a signature can be selected.



After selecting a signature reason, the Signature Capture page will open. This page allows a person to draw a signature using the phone's or tablet's touch screen. If a mistake is made while signing the document, the Clear button can be tapped to reset the signature to a white background. Tapping the Save button will save the signature.



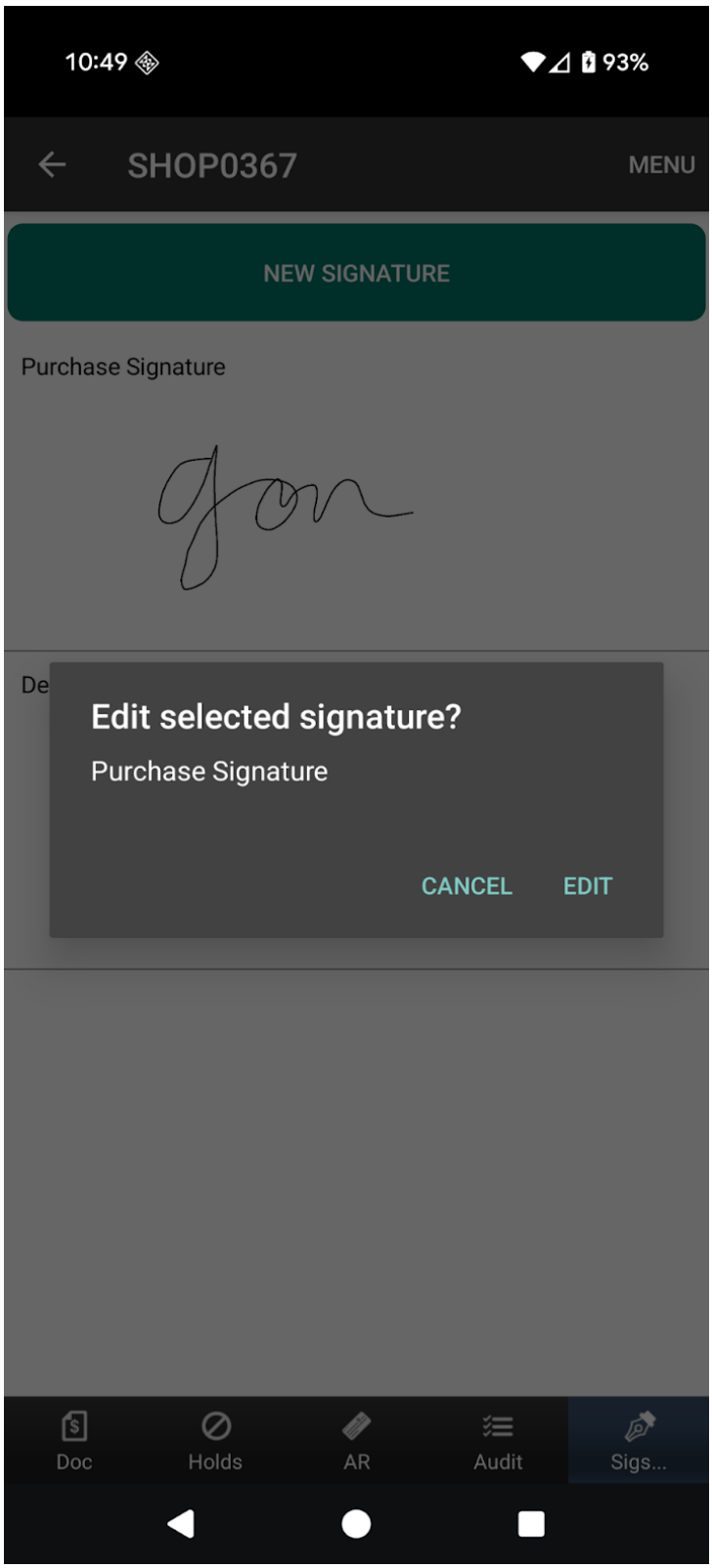
View Signatures

The signatures tab shows all of the sales document’s signatures along with the reason for each signature.



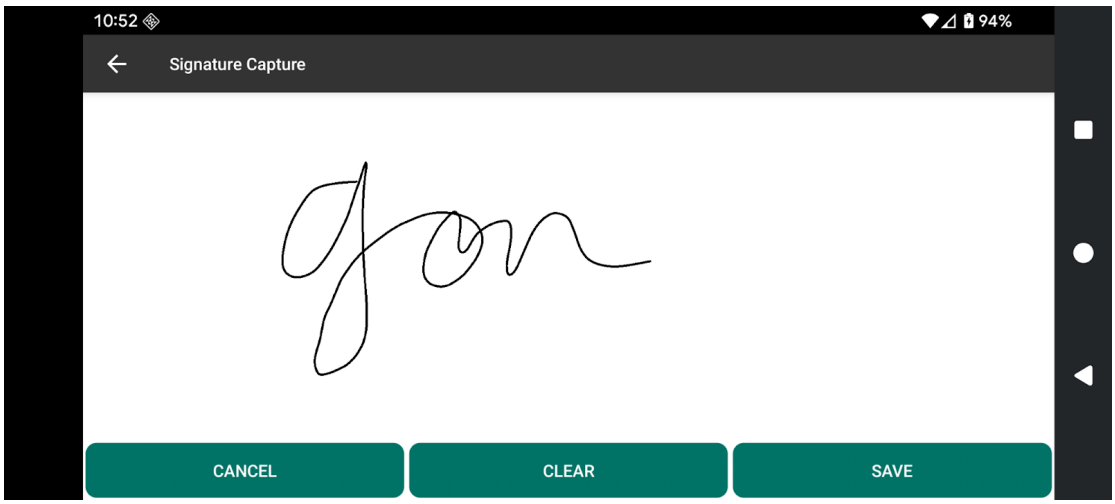
Edit Signature

To edit a signature, go to the Signatures tab and tap the signature you want to edit. The app will display a prompt to confirm.

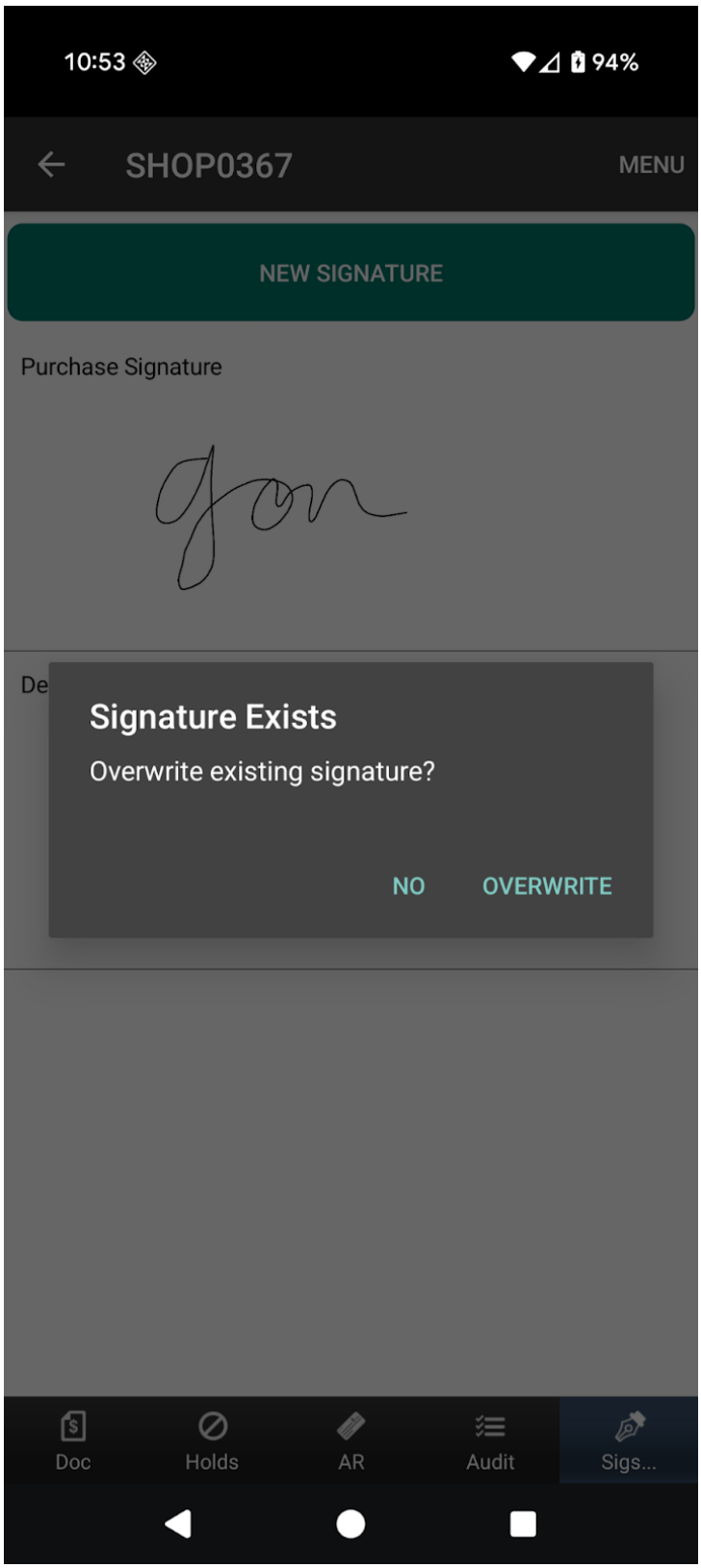


Alternatively, you can select Edit Signature from the Menu. If the sales document has more than one signature, the app will ask which signature to edit.

Once a signature is selected, the Signature Capture page will open and show the selected signature. If a slight adjustment is needed for the current signature, the touch screen can be used to add any extra detail needed. If the current signature should be replaced with a new signature, the Clear button can be tapped to clear the signature before drawing a new one.



Tapping the save button will show a prompt to confirm overwriting the existing signature. Tapping the overwrite button will save the new signature.



Offline Mode

Signatures can be created and edited in offline mode. Existing signatures can only be viewed in offline mode if the Should Sync Sales Document Signatures setting is set to 'True'.

When syncing signatures back to online mode, the app will prioritize not creating multiple signatures for the same signature reason on a sales document. If there is a conflict where a sales document would end up with two signatures with the same reason, the offline signature will overwrite the other signature. Setting Should Sync

Sales Document Signatures to ‘True’ can help avoid these conflicts.