SalesPad Desktop Release Highlights

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SalesPad Desktop 5.2

March 2021 Release

SalesPad Desktop 5.2 brings a handful of new and exciting changes to the application! Below is a list containing some of the biggest changes you'll see within SalesPad Desktop version 5.2.

- Square
- Menu Search
- Sales Analysis Templates
- DC Styling Improvements
- Automation Agent Quick Reports

Square

SalesPad Desktop now integrates with Square!

Square offers an incredibly robust payments ecosystem that provides SalesPad customers and prospects with best-in-class payment processing.

This includes support for gift cards, EMV-ready terminals, batch processing, and easy ways to handle returns. Users can now manage terminal devices directly in SalesPad offering a simple to use integration with Square terminal devices.

Menu Search

Desktop is an incredibly robust product and one common piece of feedback from users is that they don't know what they are missing out on within SalesPad. This is one step towards better-informing users of the product that we'll see improved throughout the next year.

We can help users better understand how to leverage SalesPad, being able to search for parts of the application will get us started in that direction!

Sales Analysis Templates

Users will now be able to get quick access to information by accessing reports they save in-app. Very few users are currently taking advantage of the Sales Analysis tool, but it can be beneficial!

In order to increase adoption, we are working to reduce time-to-insight by improving the experience of creating and saving views.

DC Styling Improvements

We improved some of the UX of DataCollection including modernizing some of the indicator fields and making the call-to-actions more clear. The toast alerts are now more stylized as we've moved away from a generic Gray alert to a more clear colored alert to help users understand what they are being alerted of.

This change also includes a change in the way we showcase if things are in an LP or not. Previously there was an entirely new row, that looked like an input field, to indicate that it was an LP, now it's a simple tag.

Automation Agent Quick Reports

Users can now set up automations that send quick reports on a regular interval or a cadence they define. This makes it easier to send statements, or give quick information to people on a regular basis. You could send a quick report to a customer or reduce the overall effort required to send information out of the system!

SalesPad Desktop 5.1

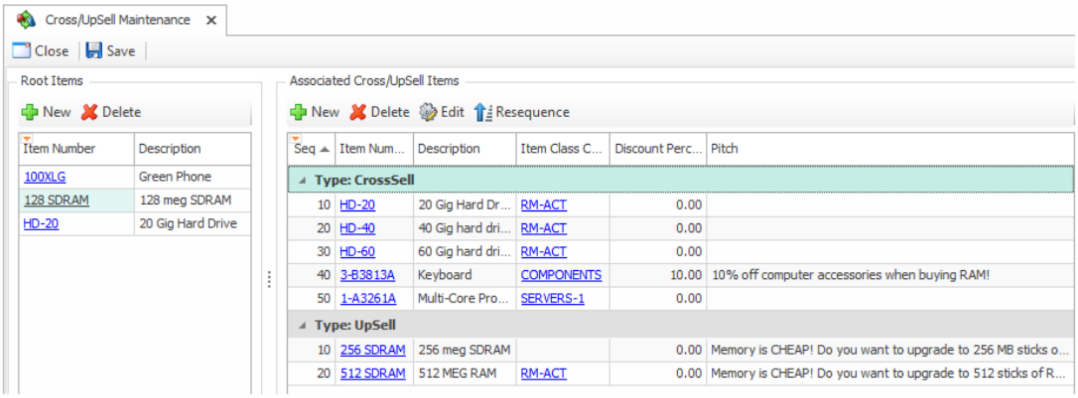
October 2020 Release

SalesPad 5.1's "Why" is to continue to empower the organizations that we work with. In-App Feedback empowers users to take control of their SalesPad experience and provide us with critical feedback on the fly. Improvements in workflow empower users to automate more of their business, and CrossSell/UpSell empowers users to own more of their sales experience.

- CrossSell/UpSell
- In-App Feedback
- Additional Business Object Workflows
- EDI Carton Label Printing

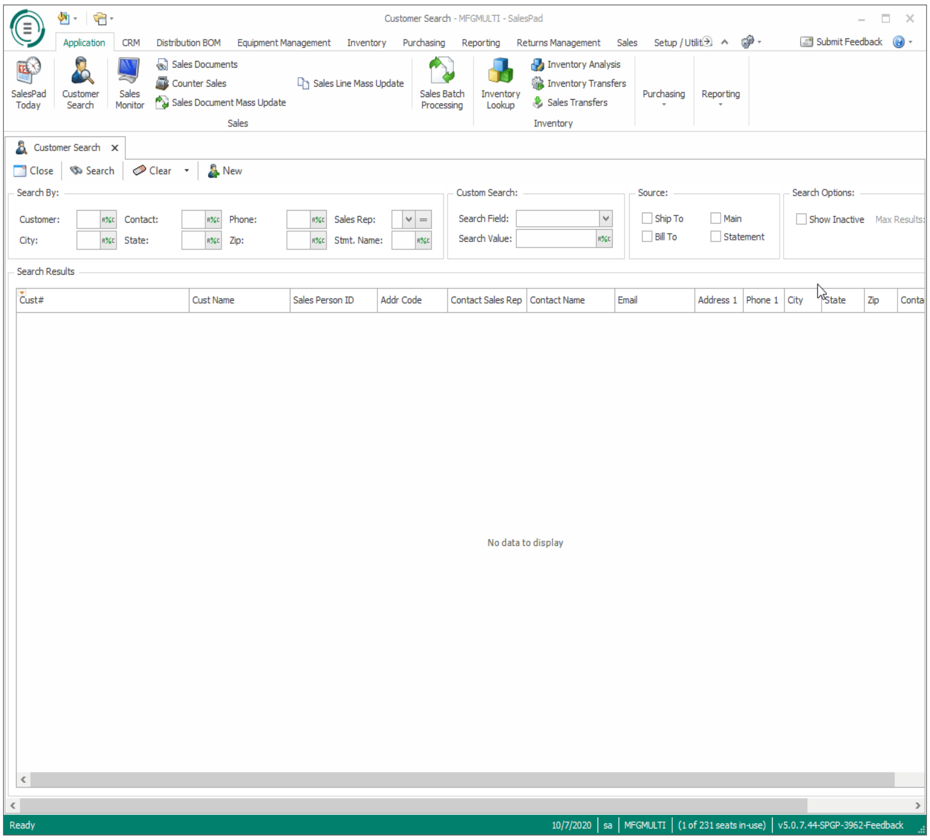
CrossSell/UpSell

With CrossSell/UpSell you can easily inform your sales teams what they could be up-selling or cross-selling, right from SalesPad Desktop! The CrossSell/UpSell module creates an easier way to make CrossSells or UpSells when entering an item into an order.



In-App Feedback

Users will now be able to leave feedback directly within SalesPad Desktop! This will help empower our users by providing our Product Team with direct feedback, while also helping close feedback loops quicker as we listen and hear from customers to iteratively improve SalesPad Desktop.



Additional workflow business objects

Users now have more options to workflow their day-to-day processes. Opportunities, Prospects, MOs, Equipment, and Inventory Adjustments can now be processed through workflow!

EDI Carton Label Printing

Users can now print EDI Carton Labels using workflow. A lot of labels need to be printed remotely (*and/or automatically*) depending on the organization. With Desktop 5.1, you can now have your Carton Labels printed automatically through workflow!

SalesPad Desktop 5.0

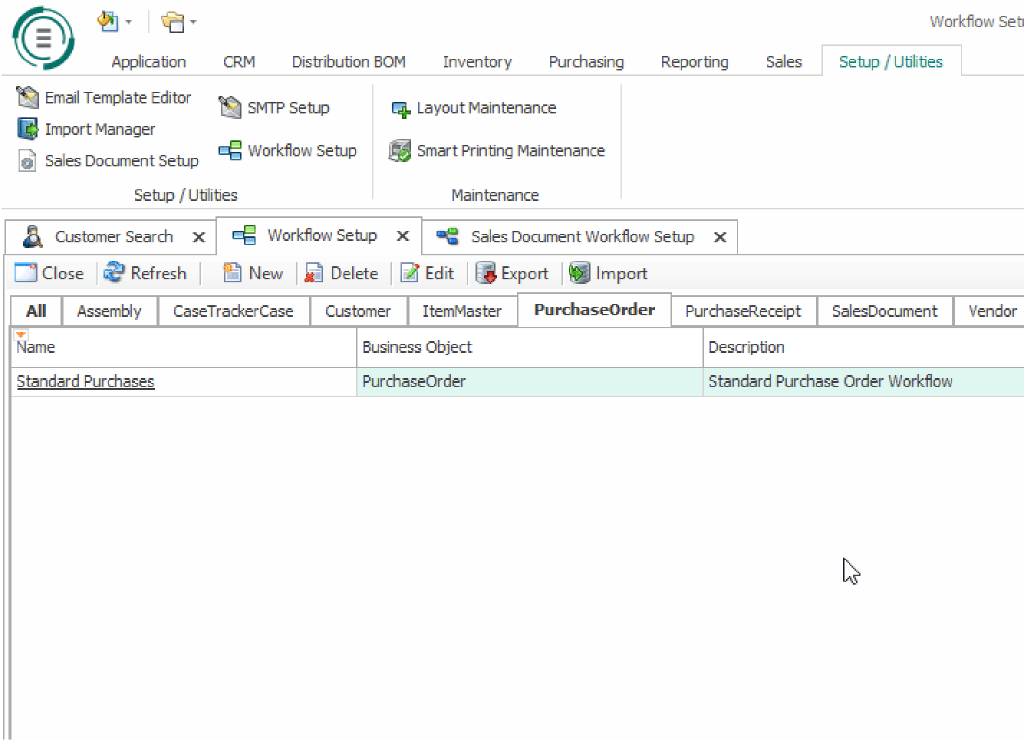
June 2020 Release

With the release of SalesPad Desktop 5.0, there are a number of new and exciting changes! Below is a list containing some of the biggest changes you'll see within 5.0. You'll also notice that following each of the modules is a short list of common use-cases. Please go through this list to help you determine if SalesPad Desktop 5.0 is the right fit for you.

- Workflow 2.0
- License Plating
- Consolidated Shipments
- Case Tracker / Equipment Management
- EDI

Workflow 2.0

SalesPad Desktop's workflow has undergone significant changes! Users can still add rules, conditions, and actions that govern how business objects are handled in a workflow, however, the interface that you will use to configure these things will look/feel very different. The entire process has been streamlined to help make setup and maintenance on your workflows as easy as possible!



Assembly

This allows you to create assembly workflow, allowing you to track every step of an item's assembly. In the first queue, you might have the order detailing what needs to put into the assembly. Once forwarded, there may be an employee responsible for assembling. They review their workflow queue daily, so that they can ensure that any assembly's are handled promptly. Once they have gathered all of the items, they forward the document to the next queue, sending it to the paint department. Once it has been painted, it gets forwarded to the detailing department. Once all of the assembly has been completed, it goes to the engineering department for review, before finally being approved and shipped out. This can now be "workflowed" reducing a ton of waiting waste!

Case Tracker

I'm a CAM and I like to know when my customers report faulty parts, so that I can create a positive touch point within the interaction. I can set up a workflow that emails me when a customer reports a case and it falls in my batch.

Customer

My company creates different rules for customers in different parts of the country or world. Let's say Michigan customers need to be reviewed by the accounting department before their account can be created. We can now standardize the review process for new customers in Michigan, and any customer entered with a Michigan address now has to be reviewed by accounting before they are ready for use.

Item

When you add a new SKU, perhaps if it's above a certain price-point, you want to review it (*while items below that price-point don't need to be reviewed*). With Workflow 2.0, you can set any newly created item above a specific price-point to require approval before it can be processed.

Purchase Order

Similarly to items, maybe you would like to personally approve large POs. You can now set a threshold to say "I want to review any POs that are above $x.xx".

Vendor

Similarly to customers, you can also set rules for vendors in different parts of the country or world, or rules based on certain criteria that you have set.

License Plating

DataCollection now has License Plates (*often referred to as Pallets/Palletization*)! License Plating allows companies to nest inventory objects into one another to perform mass inventory updates with ease.

Creating a License Plate

Your company receives a large amount of new inventory in. Your warehouse employees scan each item, building a License Plate (*or Pallet*). The user then goes and places the License Plate (*Pallet*) into your inventory, and just like that, all of the inventory from the truck has been moved into your inventory with a single transaction saving a bunch of time and scans!

Picking (*with License Plates*)

A sales representative enters a sales document, that document gets forwarded to your warehouse batch and prints. Now a warehouse employee scans the document number, to load what they need to pick. Instead of picking 10 items individually they scan the License Plate associated with the document, and it picks and fulfills the order. 1 scan instead of 10! This also applies to picking kits, as you can scan the whole kit and it will fulfill the whole kit!

Packing (*with License Plates*)

In a lot of ways, the picking action for License Plates also packs them, because you can simply put the License Plate into a box, rather than putting each individual item in.

Shipping (*with License Plates*)

After an employee picks and packs something, it is often ready to be loaded onto a truck, however, someone needs to confirm that each item got onto the truck. Instead of scanning each and every item on the truck they can just scan the License Plate, saving them a lot of time!

Bin Transfers

An employee gets a request to do bin replenishment, so they go grab the items from the back shelves and move them to the front shelves. When using License Plates, the user only needs to scan the License Plate number, and the "From" bin is auto-selected. The user then scans the “To” bin, and places License Plate in its spot, saving them from having to scan each item!

Inventory Adjustments

You receive a report that you have a large quantity of damaged inventory, and you need to remove the items from your stock. Rather than scanning each item individually, you can add them to a License Plate and process all of the damaged goods at once!

Stock Counts

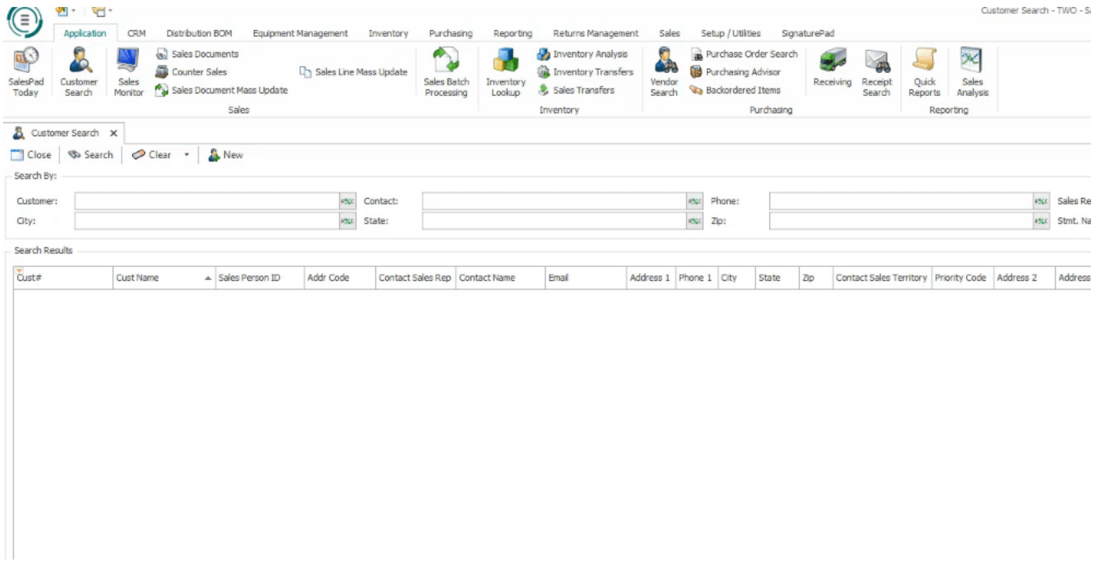
If you want to determine if your inventory is accurate, or if you doubt your inventory levels, you might want to do a stock count. Stock counts measure 'Site', 'Bin', and 'Item Number'. The License Plate data gets scanned, and the data gets sent to GP at the item level, saving you from having to scan each item in the License Plate!

Site Transfers

An employee determines that they need to move inventory from one warehouse to another. Normally, the employee would tell the person in the "To" warehouse what they want to move, and then begin scanning each individual item. Once the items have arrived at the "To" warehouse, another employee would need to scan each individual item to complete the transfer. When using License Plates, the warehouse employee can simply scan the License Plate, and move the contents of the License Plate, instead of having to scan each item! Similarly to Bin Transfers, Site Transfers also create a corresponding document in GP.

Consolidated Shipments

We've made a number of improvements to Consolidated Shipments, in an effort to help streamline the process, as well as reduce the necessary steps to find a shipment. Most notably, SalesPad Desktop users can now search for consolidated shipments!



Shipment Search

In the past, you could never really search for consolidated shipments unless you knew the exact ASN number. With many EDI customers, there are thousands and thousands of ASN's that change regularly. If you had any questions about what went out, or when it was shipped, you had to take many steps to figure out the ASN. You can now simply search to find the consolidated shipment you need.

Assign Document to Shipment

A typical use case for consolidated shipments is to; consolidate everything on a sales document, or consolidate multiple sales documents into one shipment. Instead of having to go and select each item, and potentially missing an item, you can now add the whole sales document to a consolidated shipment. This reduces your risk of missing something, while also speeding up the process for large orders!

Case Tracker / Equipment Management

On top of adding support for serialized inventory to Case Tracker, we've updated the entire Case Tracker entry process, so when your employees are on the phones frantically putting in a new case for an angry customer they won't be bogged down by the system!

Serialized Inventory Case

If there are issues on an item with a specific serial number on it, you can now track a case against that specific serial (*instead of on the item*), giving you more details about what might be going on with a specific serialized inventory item.

Enter Case from Item Screen

Sometimes, while looking at a specific item, you may notice an inconsistency, causing you to need to backtrack and look through a lot of different areas to find the cause. Case Tracker can now add a case from the item screen to help give you more ways to reduce clicks and backtrack with ease!

Add Details to Case from Sales Doc

You can now add case details from a sales document, giving you helpful context on what was on the order, as well as easily adding specific items to a case. This helps to reduce clicks and streamline the process!

EDI

We've also made a handful of improvements around EDI. We've improved our error handling, implemented some quality of life improvements, and added auditing to help quickly diagnose any issues that you may run into!

Auditing & Logging

EDI is complicated and small issues arise regularly. Keeping track of what happened and how it happened is critical to fixing issues while new trading partners are being set up. We are now logging all updates and changes to EDI related documents to help reduce some of the 'guess-work' when looking into these issues!

Go-Live

Going live with new trading partners is now just a few clicks (*rather than an entire day of work...*). You can now move your trading partner setup to production in a matter of seconds!

EDI Label Printing

Printing EDI labels can be a chore without smart printing. Fortunately, we now have smart printing, and an improved experience for printing one label at a time!

EDI Error Processing

When EDI documents fail, you can now process multiple documents at the same time (*instead of processing them one-by-one*) saving you a ton of time!

February 2019 Release

Search Screen Revamp

Each search field has the following search operators associated with it: Is Like, Equals, Begins With, Greater Than, Greater Than Or Equals, Less Than, and Less Than Or Equals. This allows for greater control when searching for specific data.

Users can now choose any available field, including User Defined Fields, on the search screen and search just that field using the custom search functionality. Search results are validated.

The new Date Range selection allows you to choose any date field, including User Defined Fields. The date range can be limited through security, and the default value is 9 months. The dropdown list of date ranges includes Today, Yesterday, This Week, Last Week, This Month, Last Month, This Year, and Last Year.

The Clear button is available across all screens and allows you to zero out all of the search fields easily. The Reset Search button can be used to reset the search parameters and date fields back to defaults.