



SalesPad Mobile Product Overview

Megan De Freitas - 2024-11-22 - Miscellaneous

Overview

The SalesPad Mobile application is available as a free download through Google Play on Android smartphone and tablet devices, as well as through the Apple App Store for the iPhone and iPad.

Once installed on a device, that device can be given a full license through the SalesPad Mobile Server (see the step-by-step walkthrough in the [SalesPad Mobile Server Installation and Initial Configuration](#) documentation), and users can begin accessing content anywhere the device has an active Internet connection.

Installation

Android

The SalesPad Mobile application can be downloaded from the Google Play marketplace and directly installed to the device.

1. Launch Google Play on the Android device.
2. Search Google Play for “SalesPad Mobile” and select the SalesPad Mobile application.
3. Tap **Download**.
4. Tap **Accept & download** if you accept the permission request.

The application is now installed and ready to be launched.

ios

The SalesPad Mobile application can be downloaded from the Apple App store and directly installed to the device.

1. Launch the App Store application from your device’s application menu.
2. Search the App Store for SalesPad Mobile and select the SalesPad Mobile application.
3. Click the green **Install** button.

The application is now installed and ready to be launched.

Note: SalesPad, LLC only supports devices on iOS 7 or higher.

Licensing Overview

The SalesPad Mobile application is a single application that is broken into several individually-licensed modules. Licensed modules are accessed via the application’s main menu.

The first time an individual logs into a SalesPad Mobile Server with a device, the user will

receive a free two-day trial of all available modules. Once the trial has ended, if no modules have been licensed through the SalesPad Mobile Server application (see the [SalesPad Mobile Server Installation and Initial Configuration](#) documentation for a step-by-step guide), the SalesPad Mobile application will not operate until a valid license is acquired.

Non-Module Screens

Login Screen

The Login Screen is the first screen seen after launching the application. The username and password entered on the login screen should be for an account setup in the SalesPad Mobile Server. The screen consists of two sub-screens: the initial screen and the login form.

1. The initial login screen presents the user with two options: Sign In or Try The Demo
 - Sign In - Clicking this button will send the user to the login form. If the user has saved credentials, the icon on the left side of this button will be colored, and clicking it will sign into the application, bypassing the login form.
 - Try The Demo - Selecting this Connection will allow the device to access a sample GP database, letting the user try the app out before installing their own SalesPad Mobile Server.
2. The login form consists of three fields, a settings gear, and a toggle:
 - User Name - The username entered here should be for a user setup in the SalesPad Mobile Server.
 - Password - The password for the user account.
 - Server - The server field is used to specify the address of the SalesPad Mobile Server to which the user will connect. Prefixing the address with https:// will allow connection to encrypted servers. Suffixing the address with : will point the mobile device to a server hosted on an alternative port. If the Mobile Server is running on an IIS Server, the full path to the Mobile Server should be entered here. See the [SalesPad Mobile Server Installation and Initial Configuration](#) documentation for help on server configuration, if needed.
 - **Save Login?** (optional) - Toggle this button to save the username, password, and server as entered for the next login.
 - **IIS Server** - Select this option if the Mobile Server is running on an IIS server.



Menu

The Menu contains all of the modules the user can access.



The Slide Menu

Navigation Menu

Tapping the Menu icon in the top right, or clicking the **Menu** button on the Android device, will slide out the navigation & action menu. Tapping any row underneath the Navigation heading will start the corresponding module.



Entry Wizards

Contacts, customers, and sales documents each have securable entry wizards under the Entry category. These will each be detailed in the documentation specific to their module.

Lookup Screens

Opening the Slide Menu on any lookup screen will give the user access to a number of actions for managing the associated data. Common lookup screen slide menu functionality is listed below

Tapping the **Refresh** row will refresh any data that has been loaded so far. If no data has been loaded, tapping the **Refresh** row will attempt to grab all the data contained in the corresponding SalesPad/GP database.



Tapping any of the **Sort by** options will sort the current list by the selected value. For example, tapping the **Sort by Customer Num** row will sort the listed customers by their customer number in descending order.

Tapping the **Reset** row will remove any sort or search filters that are currently applied.

Certain lookup screens may possess unique functionality, which will be expanded upon in their own sections.

Card Screens

Each type of card (customer, item, etc.) may have unique actions associated with them, and will be detailed in their corresponding section in this document.

Favorites

SalesPad Mobile includes functionality for managing a number of favorite items. This functionality can be found near the bottom of the slide menu, in the Favorites category.



While on any card screen, the user may add the current card to their Favorites. To do so, they must simply click the **Add Favorites** row in the Slide Menu.

This functionality is also available on lookup screens, and when used there it will also preserve the user's current search value and how they have sorted the data.

To re-access their favorite cards or lookups, the user can simply select said favorite's row in the Slide Menu.

To remove an existing favorite, press and hold on the favorite row to delete. A prompt will appear to confirm the delete action. Or, the user can navigate to said favorite, open the Slide Menu, and select **Remove Favorite**.

Recent Cards

SalesPad Mobile records the previous five cards the user has visited, and displays them in

the Recents category of the slide menu. To access a recently viewed item, simply select its row from the slide menu.



Accessories

The Accessories menu can be accessed from the Slide Menu from any screen. The Accessories menu will allow the user to connect to external devices for printing and scanning.



Troubleshooting

Error Message: User name or password was incorrect

Remember that when logging in through the mobile device, the credentials should match the credentials setup in the SalesPad Mobile Server, not SQL or any other credentials.

If an account has not yet been setup for you in the Mobile Server, contact your system administrator to have an account and mobile license appropriated for you.

Error Message: You do not have permission to change olds (or forward documents)

Only accounts with proper system security can modify holds and/or forward documents. If you should be able to modify holds or forward documents, contact your system administrator to modify permissions for your account.