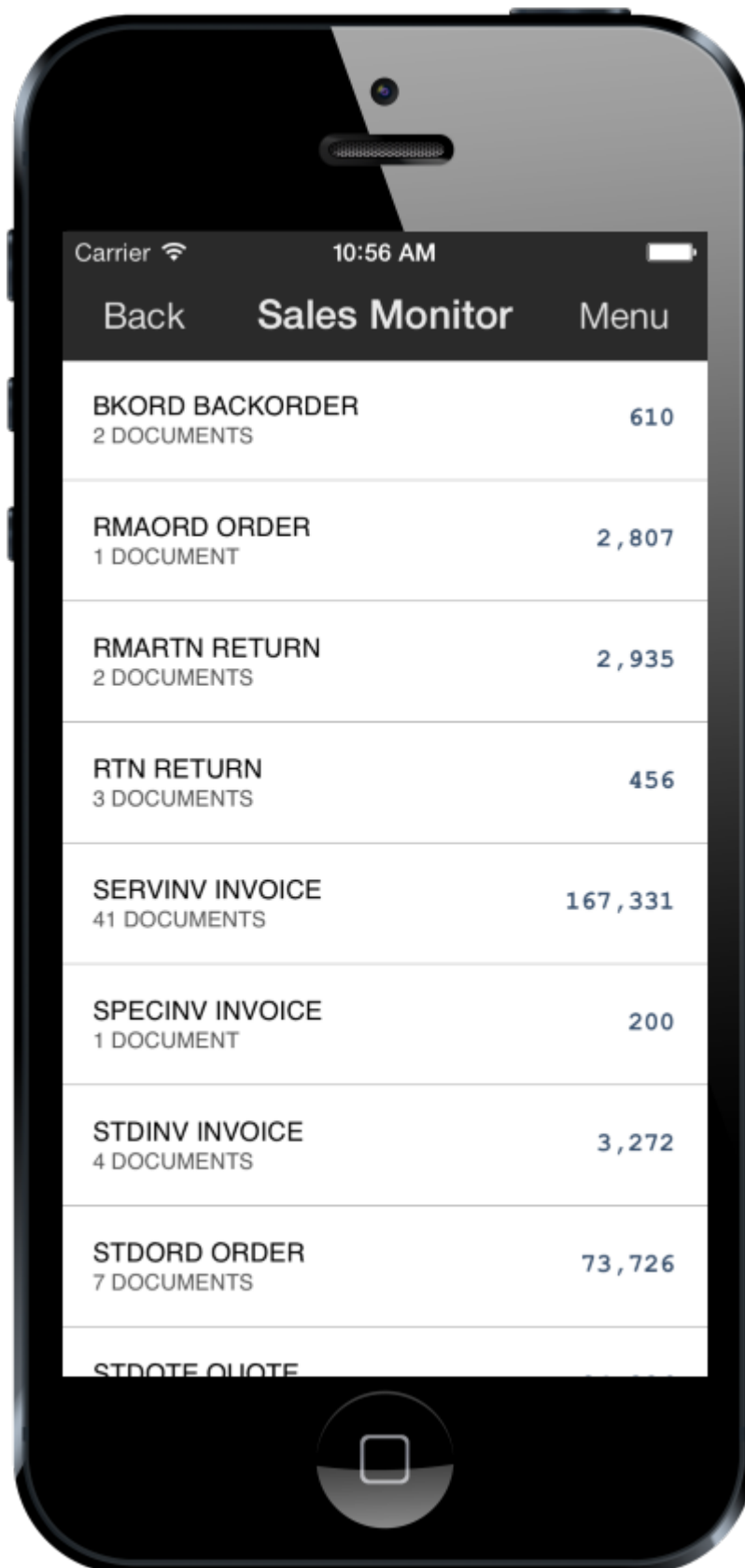## SalesPad Mobile Sales Monitor

Megan De Freitas - 2024-11-22 - Sales Monitor

The Sales Monitor module allows users to view documents throughout their company's workflow, view and modify holds and notes, and forward sales documents.
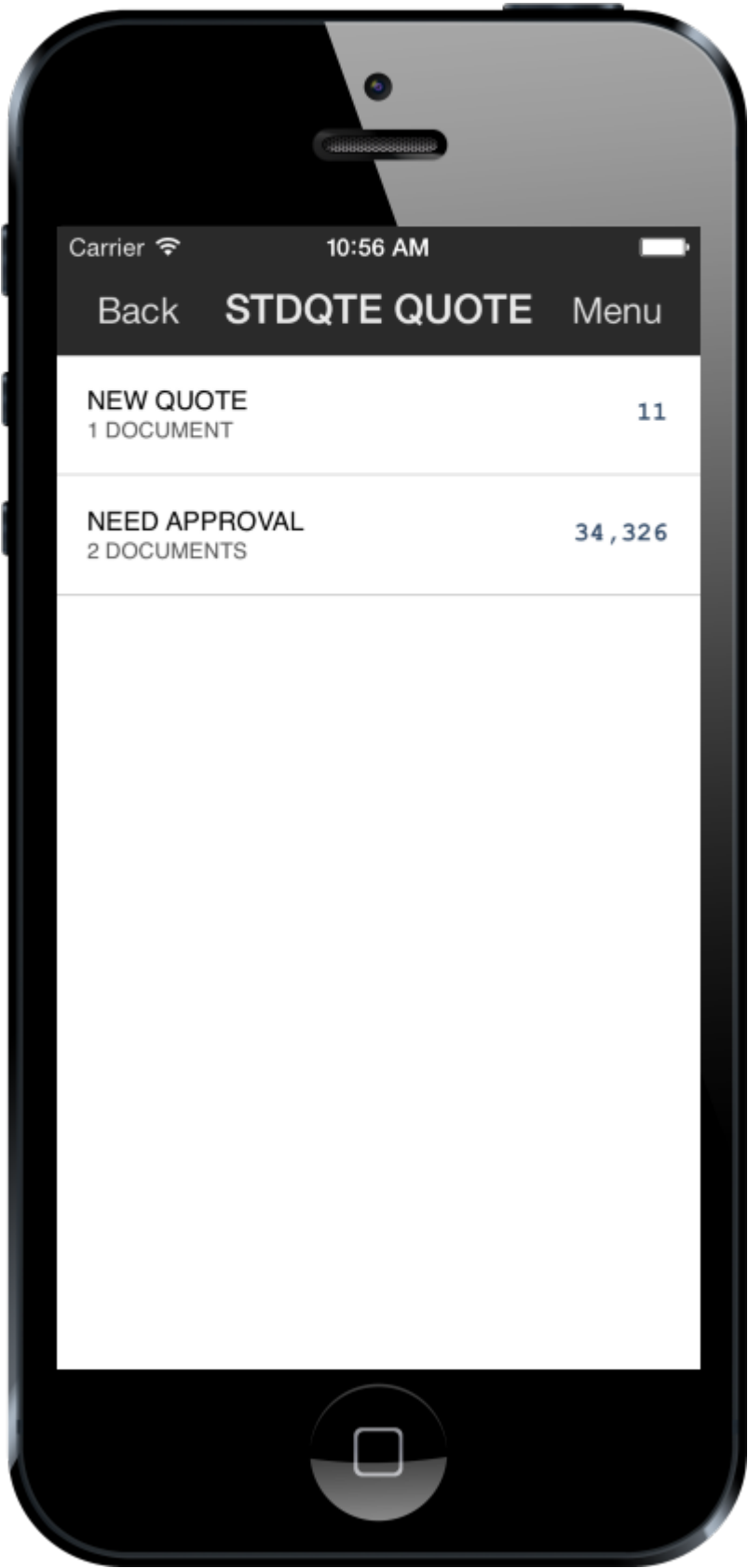
WORKFLOWS

The first screen in the Sales Monitor module contains a list of workflows. The workflow list displays the workflow names, the number of documents in that workflow, and the total value of the documents in that workflow.

BKORD BACKORDER 2 DOCUMENTS	610
RMAORD ORDER 1 DOCUMENT	2,807
RMARTN RETURN 2 DOCUMENTS	2,935
RTN RETURN 3 DOCUMENTS	456
SERVINV INVOICE 41 DOCUMENTS	167,331
SPECINV INVOICE 1 DOCUMENT	200
STDINV INVOICE 4 DOCUMENTS	3,272
STDORD ORDER 7 DOCUMENTS	73,726
STDQTE QUOTE	

SALES BATCHES

The Sales Batch List displays the sales batches for the selected workflow. Each sales batch in the workflow is represented by an entry in the list, and each entry displays the sales batch name along with the number of documents and cumulative monetary total from the

documents in that sales batch.

Tapping a sales batch will forward the user to the list of documents within the selected sales batch.
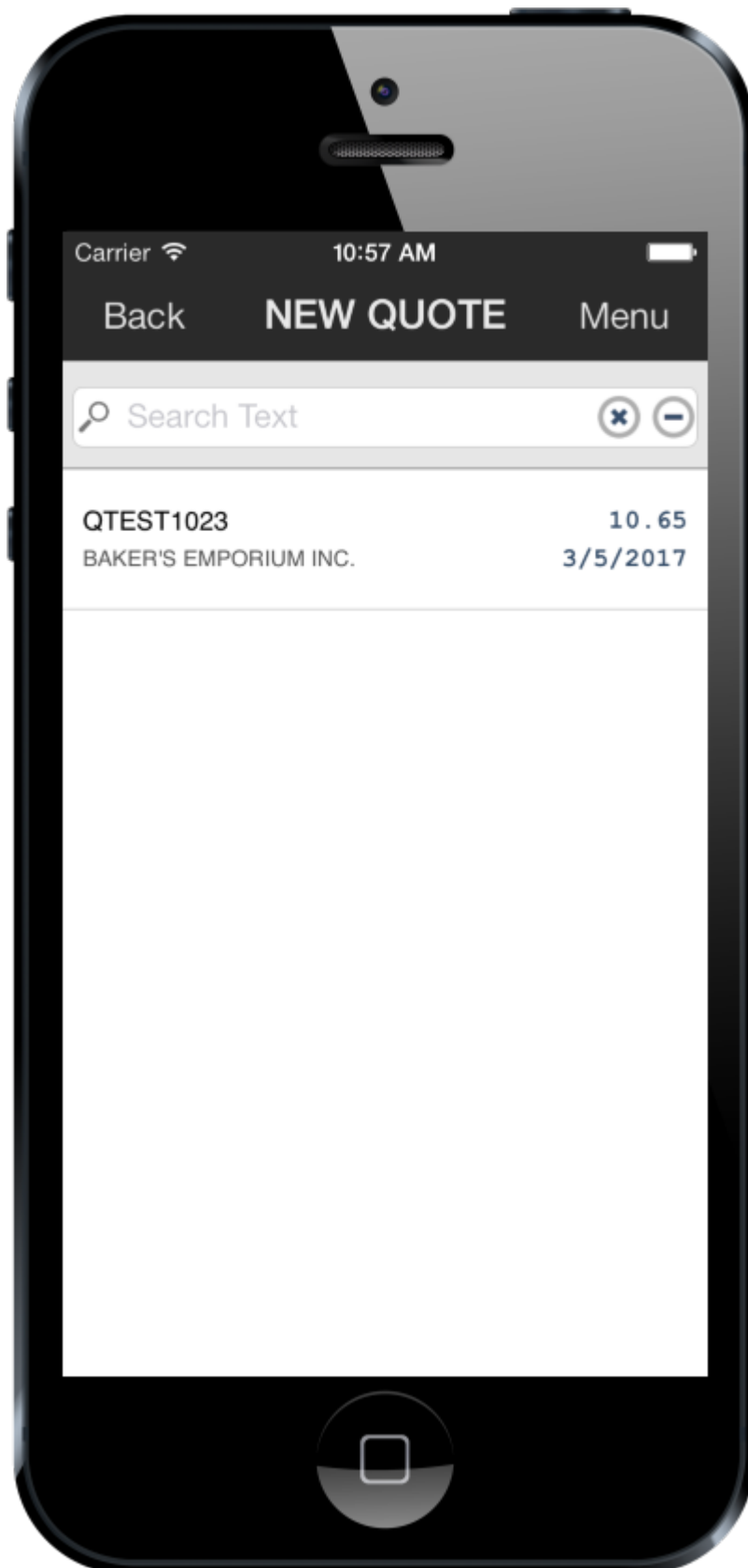
FORWARDING DOCUMENTS

After a Sales Document has been added to a Workflow, it can be moved forward along a Workflow by tapping the **Forward** button on the Slide Menu of the document.

Note: The forwarding functionality in SalesPad Mobile does not support SalesPad Desktop's
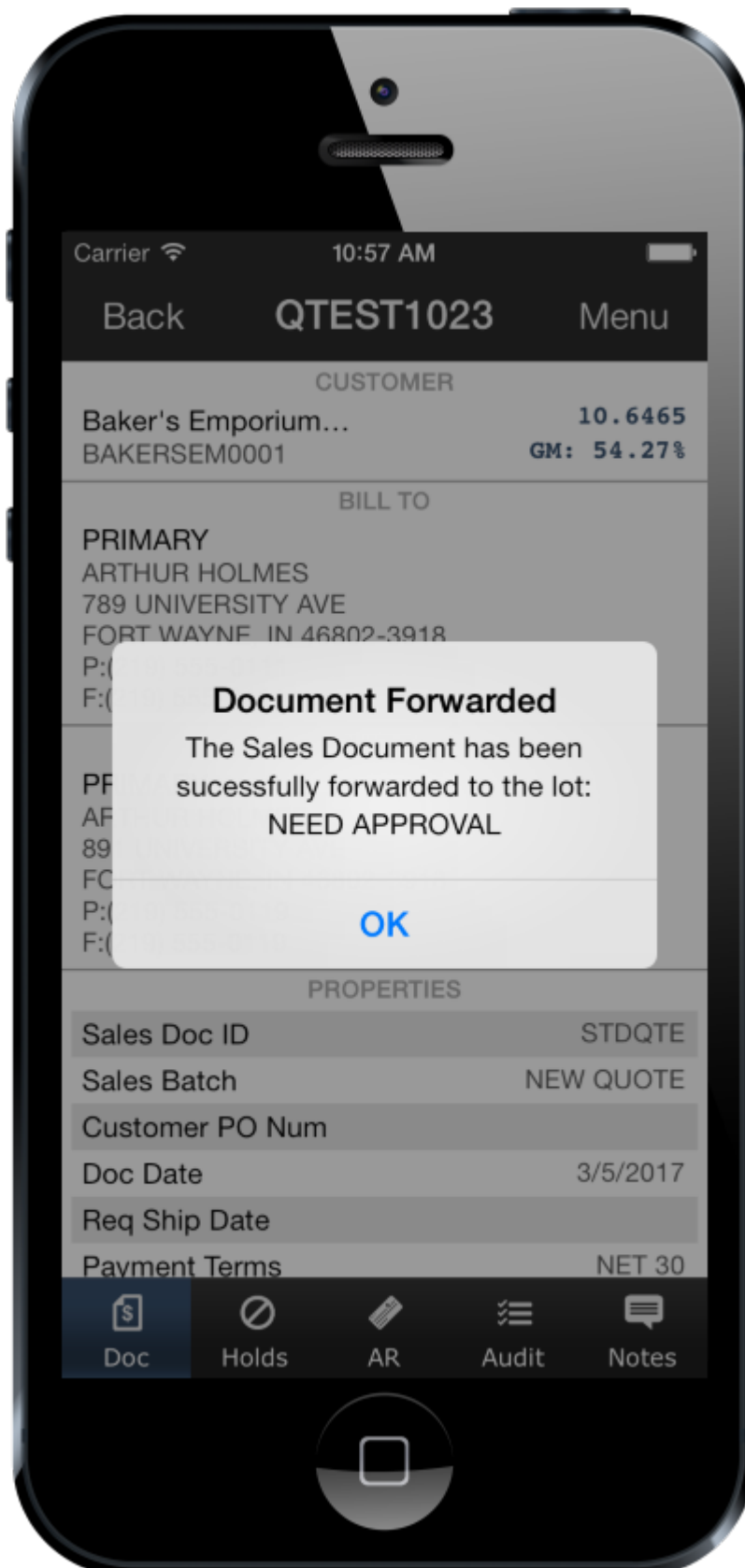
workflow plugins, rule evaluation, and auto-forwarding queues.
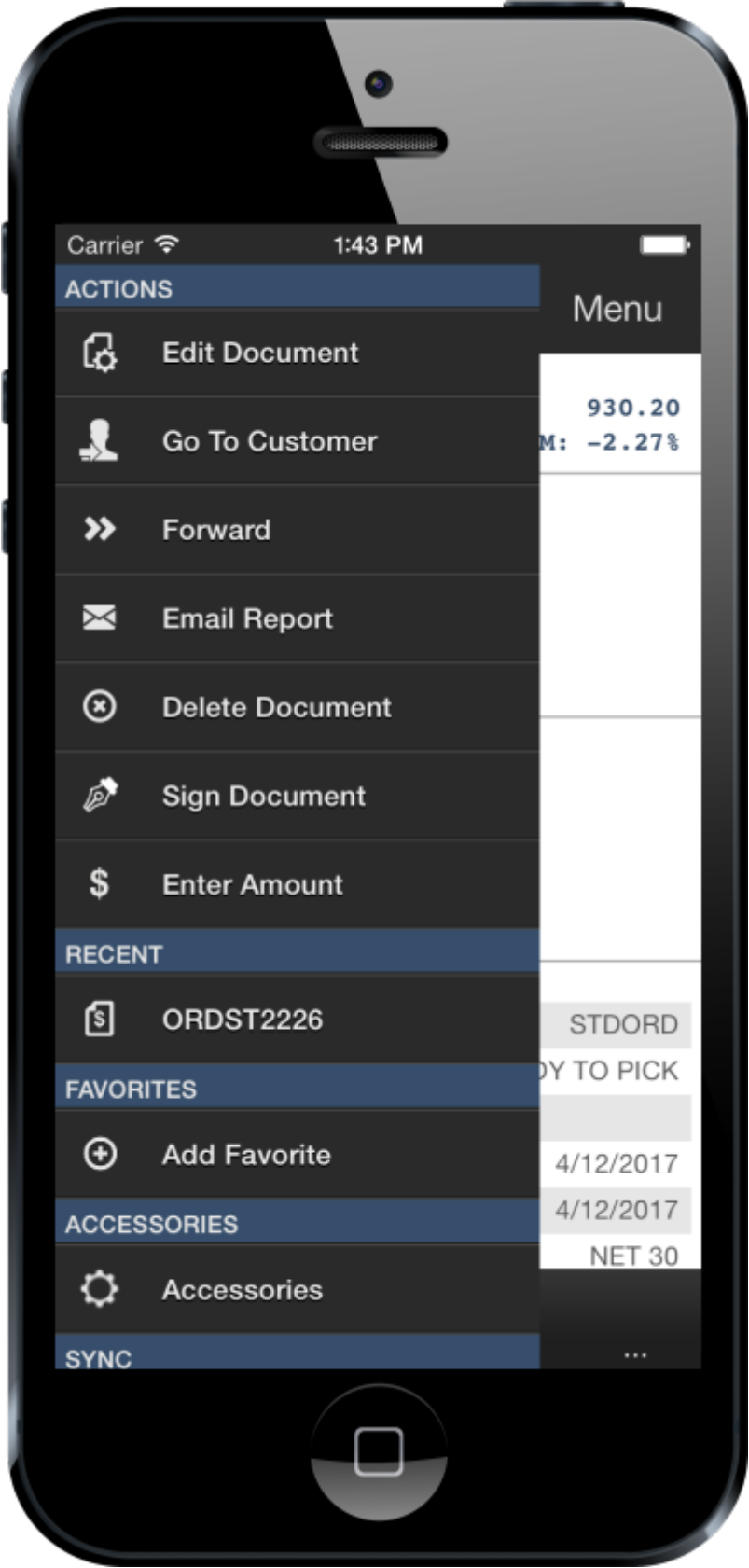
When the **Forward** button is tapped, a prompt will be displayed, prompting for verification on the Document forwarding.
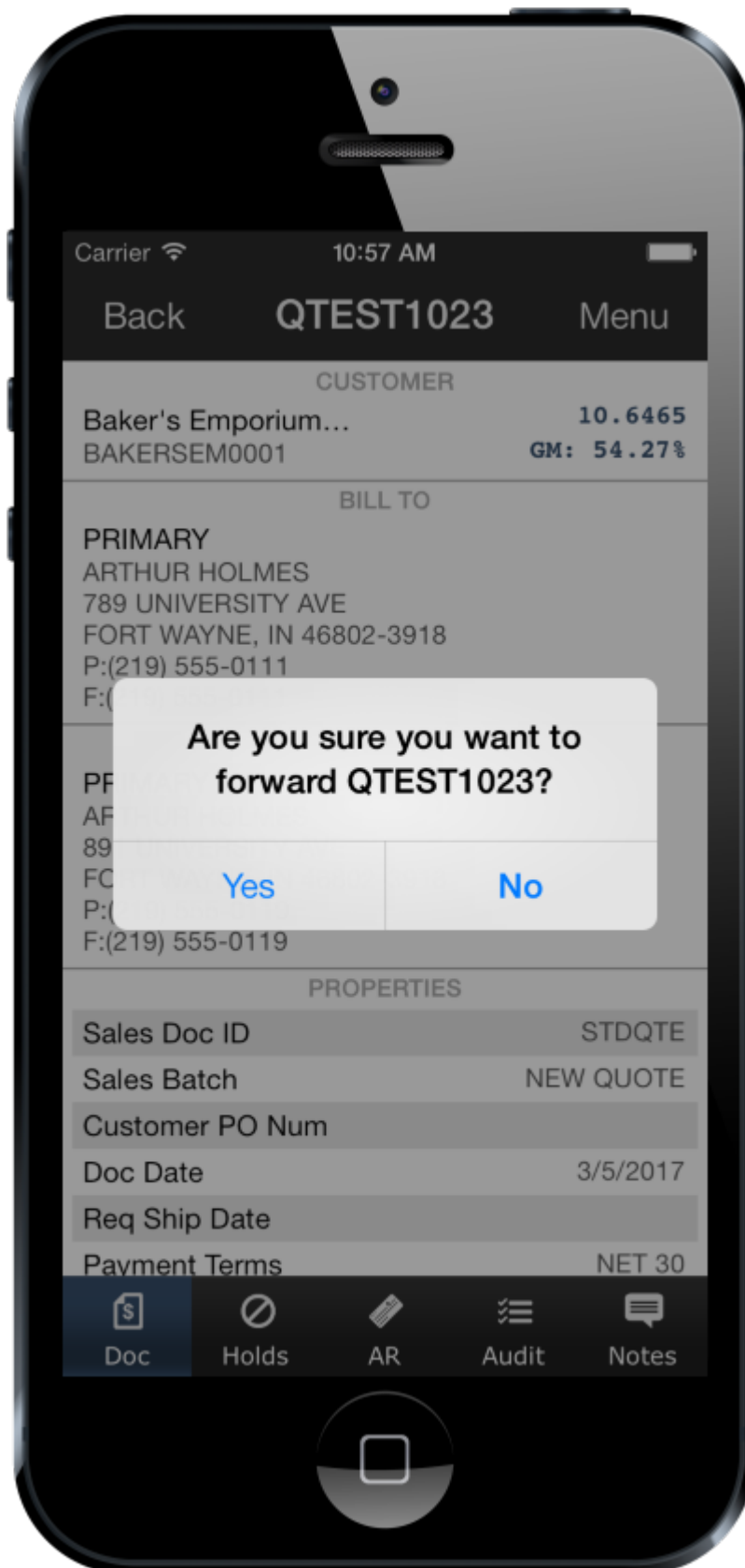
Tapping **Yes** will move the Document to the next stage of its workflow and will display a Success dialog box.

CUSTOMER

Baker's Emporium...   **10.6465**
BAKERSEM0001   **GM: 54.27%**

BILL TO

PRIMARY
ARTHUR HOLMES
789 UNIVERSITY AVE
FORT WAYNE, IN 46802-3918
P:(
F:(

Document Forwarded

The Sales Document has been
sucessfully forwarded to the lot:
NEED APPROVAL

OK

PROPERTIES

Sales Doc ID	STDQTE
Sales Batch	NEW QUOTE
Customer PO Num	
Doc Date	3/5/2017
Req Ship Date	
Payment Terms	NET 30

Doc	Holds	AR	Audit	Notes