



## SalesPad Mobile Supported Features by Platform

Megan De Freitas - 2024-11-22 - Miscellaneous

### Customer and Contact Search

<b>Feature</b>	<b>Platform</b>	<b>GP Only?</b>	<b>Offline?</b>	<b>Demo?</b>
<b>Search Customers</b>	Both	Yes	Yes	Yes
<b>Search Contacts</b>	Both	Yes	Yes	Yes
<b>View Customer Details</b>	Both	Yes	Yes	Yes
<b>View Contact Details</b>	Both	Yes	Yes	Yes
<b>Edit Customer Details</b>	Both	Yes	Yes	Yes
<b>Edit Contact Details</b>	Both	Yes	Yes	Yes
<b>View Notes</b>	Both	Yes	Yes	Yes
<b>View CRM Notes</b>	Both	No	Yes	Yes
<b>Add Notes</b>	Both	Yes	No	Yes
<b>Add CRM Notes</b>	Both	No	Yes	Yes
<b>View A/R</b>	Both	Yes	Yes	Yes
<b>View YTD</b>	Both	No	No	Yes
<b>Customer's Sales Documents</b>	Both	Yes	Yes*	Yes
<b>Historical Sales Documents</b>	Both	Yes	No	Yes
<b>See Recent Purchases</b>	Both	Yes	Yes	Yes
<b>View Sales Graphs</b>	Both	Yes	No	No
<b>View UDFs</b>	Both	No	No	No
<b>Call or Email from the App</b>	Both	Yes	Yes	Yes
<b>Update Catalog Par Quantities</b>	Both	Yes	No	No

\*Existing documents viewable with a setting. Number to Months to go back is controlled in settings.

#### Inventory

<b>Feature</b>	<b>Platform</b>	<b>GP Only?</b>	<b>Offline?</b>	<b>Demo?</b>
<b>Search Inventory</b>	Both	Yes	Yes	Yes
<b>View Item Details</b>	Both	Yes	Yes	Yes
<b>View Associated Documents and Purchase Orders</b>	Both	Yes	Yes	Yes
<b>Add Notes</b>	Both	Yes	No	Yes
<b>View Item Quantity by Warehouse</b>	Both	Yes	Yes	Yes
<b>View UDFs</b>	Both	No	No	No

#### Sales Documents

<b>Feature</b>	<b>Platform</b>	<b>GP Only?</b>	<b>Offline?</b>	<b>Demo?</b>
<b>Search Documents</b>	Both	Yes	Yes <sup>1</sup>	Yes
<b>Create Documents</b>	Both	Yes	Yes	Yes
<b>Edit Documents</b>	Both	Yes	Yes <sup>2</sup>	Yes
<b>Add or Remove Holds</b>	Both	Yes	Yes	Yes
<b>Change / Add Line Items</b>	Both	Yes	Yes	Yes
<b>Add Customer's Default Items</b>	Both	No	Yes	Yes
<b>Scan Barcodes</b>	Both	Yes	Limited <sup>3</sup>	Yes
<b>Capture Signatures</b>	Both	Yes!	Yes	Yes
<b>Email Reports</b>	Both	Yes	No	No
<b>View the Audit Log</b>	Both	No	No	No
<b>View CRM Notes</b>	Both	No	Yes	Yes
<b>Add CRM Notes</b>	Both	No	No	Yes
<b>Enter Cash or Check Payments</b>	Both	Yes	No	Yes
<b>Enter Manual Credit Card Payments</b>	Both	Yes	No	Yes

<b>Auth or Charge a Card</b>	Both <sup>4</sup>	No	No	Yes
<b>Forward a Document Through the Workflow</b>	Both	No	Yes	Yes
<b>SalesPad Pricing</b>	Both	No	Yes <sup>5</sup>	No
<b>Browse Catalogs</b>	Both	Yes	No	No
<b>View UDFs</b>	Both	No	No	No

<sup>1</sup>Existing documents viewable with a setting.

<sup>2</sup>Existing documents viewable with a setting.

<sup>3</sup>Can only search on Item Number or Short Description.

<sup>4</sup>Requires Payfabric and a supported EMV device.

<sup>5</sup>Standard, Special, and Group Pricing only.

#### Sales Monitor

<b>Feature</b>	<b>Platform</b>	<b>GP Only?</b>	<b>Offline?</b>	<b>Demo?</b>
<b>View Documents by Workflow</b>	Both	No	No	Yes
<b>View Documents by Batch</b>	Both	Yes	No	Yes

#### Misc

<b>Feature</b>	<b>Platform</b>	<b>GP Only?</b>	<b>Offline?</b>	<b>Demo?</b>
<b>Remembers Recent Customers, Contacts, Items, and Documents</b>	Both	Yes	Yes	Yes
<b>Mark Favorites</b>	Both	Yes	Yes	Yes
<b>Supports Spanish Locales</b>	Both	Yes	Yes	Yes
<b>Filter at Server (System Filters)</b>	Both	Yes	Yes*	Yes
<b>Print from Device</b>	Both	Yes	Yes	Yes

\*Filtered when the database is generated.