SalesPad Mobile Supported Features by Platform

Cavallo Support - 2024-11-22 - Miscellaneous

Customer and Contact Search

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

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

Inventory

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

Sales Documents

Feature	Platform	GP Only?	Offline?	Demo?
Search Documents	Both	Yes	Yes[1]	Yes
Create Documents	Both	Yes	Yes	Yes
Edit Documents	Both	Yes	Yes[2]	Yes
Add or Remove Holds	Both	Yes	Yes	Yes
Change / Add Line Items	Both	Yes	Yes	Yes
Add Customer's Default Items	Both	No	Yes	Yes
Scan Barcodes	Both	Yes	Limited[3]	Yes
Capture Signatures	Both	Yes!	Yes	Yes
Email Reports	Both	Yes	No	No
View the Audit Log	Both	No	No	No
View CRM Notes	Both	No	Yes	Yes

Add CRM Notes	Both	No	No	Yes
Enter Cash or Check Payments	Both	Yes	No	Yes
Enter Manual Credit Card Payments	Both	Yes	No	Yes
Auth or Charge a Card	Both[4]	No	No	Yes
Forward a Document Through the Workflow	Both	No	Yes	Yes
SalesPad Pricing	Both	No	Yes[5]	No
Browse Catalogs	Both	Yes	No	No
View UDFs	Both	No	No	No

[1]Existing documents viewable with a setting.

[2]Existing documents viewable with a setting.

[3]Can only search on Item Number or Short Description.

[4]Requires Payfabric and a supported EMV device.

[5]Standard, Special, and Group Pricing only.

Sales Monitor

Feature	Platform	GP Only?	Offline?	Demo?
View Documents by Workflow	Both	No	No	Yes
View Documents by Batch	Both	Yes	No	Yes

Misc

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

*Filtered when the database is generated.