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## SalesPad Mobile Supported Features by Platform

Megan De Freitas - 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 <sup>1</sup>     | Yes   |
| Create Documents                  | Both     | Yes      | Yes                  | Yes   |
| Edit Documents                    | Both     | Yes      | Yes <sup>2</sup>     | 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 <sup>3</sup> | 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   |

|  |                   |     |                  |     |
|--|-------------------|-----|------------------|-----|
| <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.