



SalesPad® is your definitive answer to cost-effectively accessing Dynamics® GP data. Easy to learn, simple to use—you'll improve your bottom line while increasing customer satisfaction.

▶ Quick Access To Customer Info

Find it when you need it. Our Customer Card displays at a glance all customer information, from open sales documents and individual contracts to AR records, item purchase histories and special pricing. This single-screen navigation affords you more time to serve your customer better.

▶ Easy Quote & Sales Order Entry

Our Sales Document Entry window makes it easy to enter any type of sales document in a consistent, configurable, and easy-to-learn screen. Users can enter quotes, orders, invoices, and returns. Based on security, users may also copy previously entered documents and release them into SalesPad® workflow. In addition, returns can be originated directly from historical sales invoices.

▶ Efficient Workflow Management

With SalesPad® Workflow, you can define individual processes for each type of document your company uses. Predefined rules can be configured to control how each document flows through the order fulfillment and invoicing process.

▶ Improved Inventory Visibility

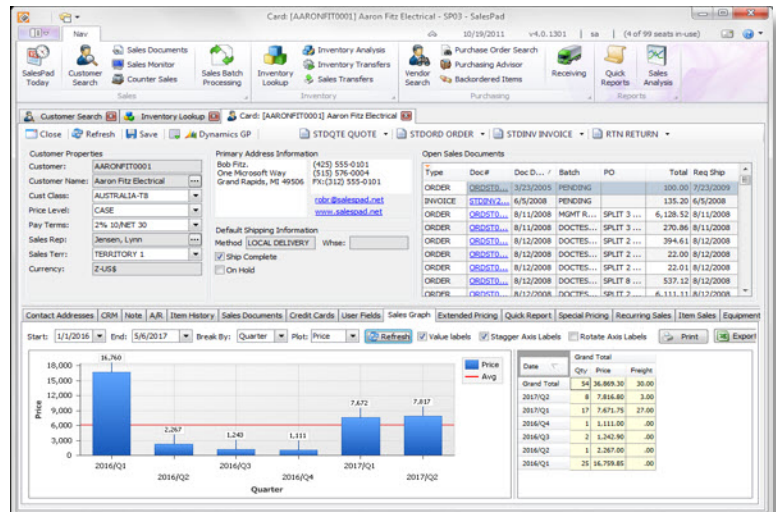
See it at a glance. SalesPad® Inventory Lookup displays in rich detail all aspects of your inventory on a single screen. With just a few clicks, you can view item availability and properties across multiple companies and inventory locations.

▶ Comprehensive Purchasing Functionality

SalesPad® Purchase Order creation allows users to efficiently generate Purchase Orders directly from backordered line items on a sales document. This is essential for those who sell a significant number of special order or non-inventory items.

Cost Savings

Because SalesPad® integrates completely with Microsoft Dynamics GP, it eliminates the need for many users to operate in both programs. Previously, organizations wanting to process sales orders in Microsoft Dynamics GP had to purchase a license for every salesperson. Sales personnel can operate exclusively in SalesPad®, eliminating the need to purchase additional Microsoft Dynamics GP licenses – a savings of approximately 25 percent.



Customer Sales Graph

About SalesPad Solutions—SalesPad Solutions provides a complete portfolio of front-end sales order processing, customer service, and inventory control software to seamlessly interface with Microsoft® Dynamics GP. For more information about SalesPad Solutions and its products, please contact your Microsoft partner or call SalesPad Solutions at (616) 245-1221. You can also visit us on the web at www.salespad.net or drop us a line via e-mail at sales@salespad.net.



Additional Feature Highlights

Because SalesPad® is sold as a single module, the following are just a few of the many advanced features included with your purchase of a SalesPad® license.

▶ Exporting Data Into Microsoft® Excel

All data in SalesPad® can be viewed in columnar grids which can be easily exported into Microsoft Excel. This feature makes it very easy for the user to access and analyze data without having to design and program predefined reports.

▶ Document Splitting

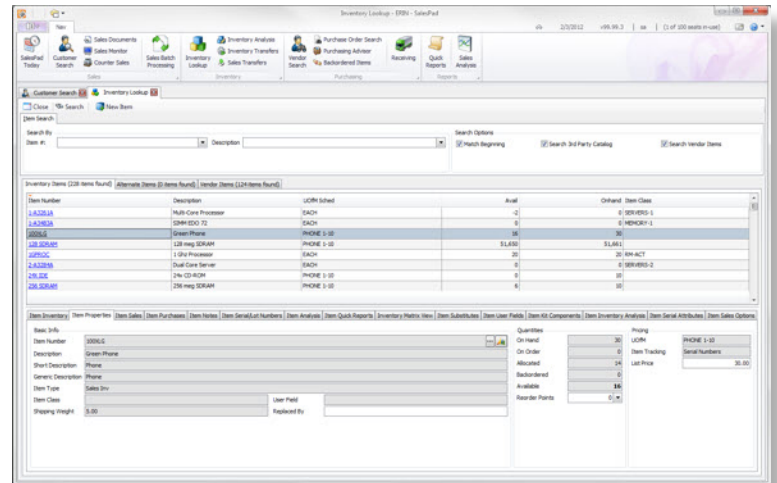
Splitting documents allows SalesPad® Workflow to manage the movement of each document through the fulfillment process based on the unique characteristics of that document. This feature is particularly relevant if the document contains backordered or Non-Inventory items, line items to be fulfilled from two or more unique inventory locations, Drop Ship line items, and line items with different shipping methods.

▶ Alternate Inventory Lookup

With Alternate Inventory Lookup, you can create and search separate item databases. Items from this Alternate Inventory Database are easily selected and added to any sales document as a non-inventory Item. This is especially useful for those who process a high volume of requests for special order items.

▶ Unlimited User Defined Fields

With SalesPad® User Field Editor, no programming is required to customize your User Defined Fields. Add an unlimited amount of these fields to several different business objects, including Customer, Contact, Vendor, Item, Sales Document Header, and Sales Document Line Item Records.



Inventory Lookup

Available Add-ons

The following add-ons to SalesPad® are available to further increase functionality.

▶ Fully Integrated Credit Card Processing with CardControl™

With the purchase of CardControl, users can securely store unlimited credit cards and process authorizations and charges for any sales document type.

▶ Microsoft® Outlook Email Integration

Integrate emails sent to and from customers with SalesPad's CRM functions using SalesPad® Outlook Add-in.

SalesPad Solutions offers additional stand-alone products to complete your distribution solution. **DataCollection™** provides an easy to deploy and use mobile bar-code solution for receiving and fulfillment. **InventoryControl™** allows advanced inventory and warehouse control. **ShipTo™** enables simple, inexpensive integration to UPS® WorldShip and FedEx® Ship Manager, and **SalesMonitor™** delivers sales document status information to iOS and Android mobile devices.

Features List

Searches

- Customer and Contacts
- Vendor and Contacts
- Sales Documents
- Inventory
- Alternate Item Catalog
- Customer Part Number
- Equipment
- Assembly
- Bill of Materials

Customer/Vendor Maintenance

- Create New Customers and Vendors
- Add/Edit/Delete Contacts
- Create and Edit Detailed Customer and Contact Specific Notes
- Graph Customer Purchases
- Sales and Purchase History by Document
- Sales and Purchase History by Item

CRM

- Enter Tasks and Reminders
- Log Customer Notes and Contacts
- Generate Call Lists
- View Scheduled Activities in a Calendar

Sales Entry

- Quotes, Orders, Invoices, Returns
- Detailed Item and Document Notes
- Inventory Lookup and Quick Item Creation and Maintenance
- View Previously Purchased Items
- Margin Summary (Entire Order)
- Sales Document Audit Log
- Sales Monitoring
- Special Pricing and Discounts
- Payments, Fulfillment, and Shipping
- Counter Sales
- Blanket Ordering and Recurring Sales
- Mass Updating and Batch Processing of Sales Documents

Inventory

- Search by Item Number and Description
- Search Item Attributes
- View All Locations at Once
- View Lots and Serial Numbers
- Create and Search Alternate Item Catalog
- Convert Non-Inventory Items
- Item Sales Graph
- View Item Properties, Purchases, etc.
- Item Maintenance and Configuration
- Item Availability & Item Replacement
- Search Vendor Items
- Transfer Inventory Between Sites

Workflow

- Route Sales Documents through your Business Processes
- Customizable Workflow Queues and Rules
- Fulfill From Multiple Warehouse Sites using Multiple Shipping Methods
- Document Splitting

Purchasing

- Demand-Based Purchasing
- View Items that need to be Purchased
- Reorder Point Visibility and Maintenance
- Create and Edit Purchase Orders (POs)
- Generate POs Directly from a Sales Document
- Consolidate Demand from Multiple Sales Documents on a Single PO
- Automatic PO Generation

Customization

- All Grids Save User Preferences
- All Grids Printable and Exportable
- Screen Header Layouts are Customizable
- Integrated Report Writer
- Custom Screens and Tabs available
- Unlimited User Defined Fields
- On Load, Pre Save, and Pre Transfer Scripting

Reporting

- Comprehensive Reporting and Analytics, including Sales Analysis Reports and Quick Reports
- Customize All Printed Sales and Purchasing Documents, including: Quotes, Orders, Pick Tickets, Packing Slips, Invoices, Return Documents, and POs
- Customizable Dashboards
- Export Grid Data to Excel

Emailing/Faxing/Printing

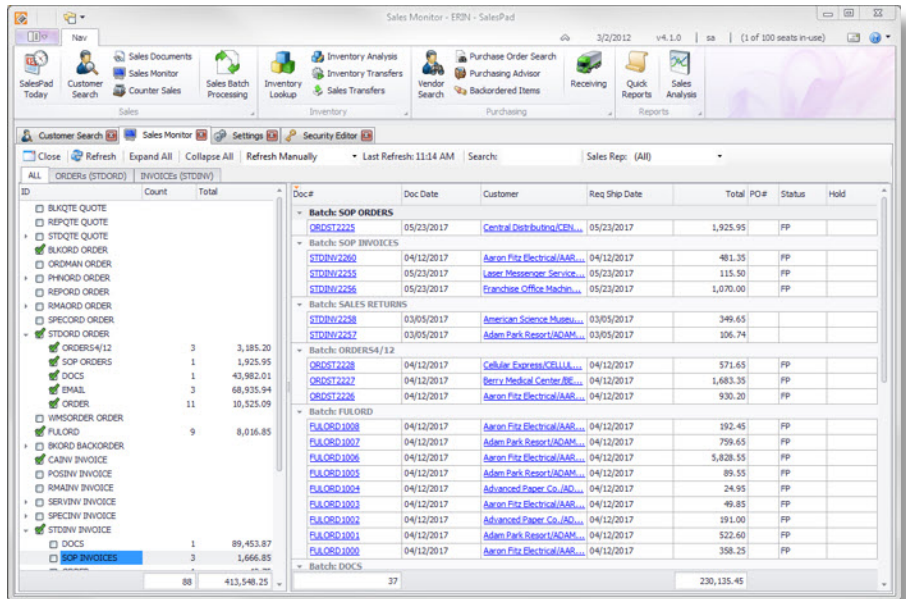
- Manually Email, Fax, or Print Sales Documents and Purchase Orders individually or in bulk
- Automatically Email, Fax, or Print Sales Documents and POs using Smart Printing or Sales Batch Processing
- Customize Email Templates

Security

- Define All Users and Groups
- Secure Individual Screens and Tabs
- Restrict Access to Specific Data (i.e. Hide Cost, Margin)

System Management

- View Active User Connections
- View "Locked" Documents



The screenshot displays the 'Sales Monitor' window in SalesPad. The interface includes a navigation bar with icons for Sales Documents, Sales Monitor, Counter Sales, Sales Batch Processing, Inventory, Inventory Analysis, Inventory Transfers, Sales Transfers, Vendor Search, Purchase Order Search, Purchasing Advisor, Backordered Items, Receiving, Quick Reports, and Sales Analysis. The main area shows a grid of sales documents with columns for Doc#, Doc Date, Customer, Req Ship Date, Total PO#, Status, and Hold. The grid is filtered to show 'INVOICES (STDNV)' and includes various document types such as QUOTE, ORDER, INVOICE, and RETURNS. A summary row at the bottom shows 88 documents with a total value of 413,548.25.

| Doc# | Doc Date | Customer | Req Ship Date | Total PO# | Status | Hold |
|-----------------------------|------------|-----------------------------|---------------|------------|------------|------|
| Batch: SOP ORDERS | | | | | | |
| ORD12223 | 05/23/2017 | Central Distributors/CEN... | 05/23/2017 | 1,925.95 | FP | |
| Batch: SOP INVOICES | | | | | | |
| STDNV2260 | 04/12/2017 | Aaron Fitz Electrical/AA... | 04/12/2017 | 481.35 | FP | |
| STDNV2255 | 05/23/2017 | Laser Messenger Service... | 05/23/2017 | 115.50 | FP | |
| STDNV2256 | 05/23/2017 | Franchise Office Machin... | 05/23/2017 | 1,070.00 | FP | |
| Batch: SALES RETURNS | | | | | | |
| STDNV2258 | 03/05/2017 | American Science Musc... | 03/05/2017 | 349.65 | | |
| STDNV2257 | 03/05/2017 | Adam Park Resort/ADAM... | 03/05/2017 | 106.74 | | |
| Batch: ORDERS4/12 | | | | | | |
| ORD12228 | 04/12/2017 | Cellular Express/CELL... | 04/12/2017 | 571.65 | FP | |
| ORD12227 | 04/12/2017 | Berry Medical Center/BE... | 04/12/2017 | 1,683.35 | FP | |
| ORD12226 | 04/12/2017 | Aaron Fitz Electrical/AA... | 04/12/2017 | 930.20 | FP | |
| Batch: FULORD | | | | | | |
| FULORD1008 | 04/12/2017 | Aaron Fitz Electrical/AA... | 04/12/2017 | 192.45 | FP | |
| FULORD1007 | 04/12/2017 | Adam Park Resort/ADAM... | 04/12/2017 | 759.65 | FP | |
| FULORD1006 | 04/12/2017 | Aaron Fitz Electrical/AA... | 04/12/2017 | 5,828.55 | FP | |
| FULORD1005 | 04/12/2017 | Adam Park Resort/ADAM... | 04/12/2017 | 89.55 | FP | |
| FULORD1004 | 04/12/2017 | Advanced Paper Co./AD... | 04/12/2017 | 24.95 | FP | |
| FULORD1003 | 04/12/2017 | Aaron Fitz Electrical/AA... | 04/12/2017 | 49.85 | FP | |
| FULORD1002 | 04/12/2017 | Advanced Paper Co./AD... | 04/12/2017 | 191.00 | FP | |
| FULORD1001 | 04/12/2017 | Adam Park Resort/ADAM... | 04/12/2017 | 522.60 | FP | |
| FULORD1000 | 04/12/2017 | Aaron Fitz Electrical/AA... | 04/12/2017 | 358.25 | FP | |
| Batch: DOCS | | | | | | |
| | | | | 230,135.45 | | |
| | | | | 88 | 413,548.25 | |

Sales Monitor