



## SalesPad ERP

### License

Per concurrent user

## SalesPad ERP Overview

SalesPad ERP delivers an all-in-one order entry, CRM, and sales management solution to integrate seamlessly with your Intuit QuickBooks data. SalesPad ERP was designed for speed and scalability to allow your business to optimize QuickBooks for accounting as your company grows.

## Product Features

### Application Design

- Tabbed interface
- User fields and screen customization
- SQL Server for scalability and performance
- Users, groups, and role permission security

### Customers

- Names, contacts, and addresses
- Add, change, delete, and export
- Audit trail
- Previous purchases, Accounts Receivable, popup note, CRM, and more
- Unlimited user fields

### Inventory

- Inventory lookup
- Item sales history
- Item graphs
- Special item pricing
- Item resource and document uploads
- Item notes
- Item kitting (groups and assemblies)
- Unlimited user fields

### QuickBooks Integration

- Single integration machine running QuickBooks
- Customer, sales, vendor, PO, inventory
- Integration reports and scheduled intervals
- Users work outside of QuickBooks
- Non-essential data is kept out of QuickBooks

### Sales Workflow

- Sales monitor
- Workflow rules
- Alerts and approval
- Backorder management
- eCommerce and EDI queues
- Batch processing
- Customizable

### Sales

- Estimates, orders, invoices, and credit memos
- Add, change, delete, and export
- Audit trail
- Sales monitor
- Unlimited user fields
- Document transfers, splitting, and posting
- Print, email, and fax documents
- Profitability and margin analysis



## SalesPad ERP

### Vendors

- Names, contacts, and addresses
- Add, change, delete, and export
- Audit trail
- POs and CRM
- Unlimited user fields

### Purchasing

- Add, change, delete, and export
- Standard and dropship
- Audit trail
- Create from a sales order
- SOP to POP links
- Purchase advisor
- Purchase monitor

### Add On Products

- SalesPad Mobile
- Email Add-In
- CardControl
- ShipCenter
- MobileBoards

### Reporting

- Interactive sales analysis
- Dashboard designer and view
- Customer, vendor, and item performance graphs
- Grid reports
- Marketing and sales campaigns

### CRM

- Prospects, opportunities, and interactions (CRM notes and scheduled tasks)
- SalesPad Today calendar
- Funnel management
- Unlimited user fields