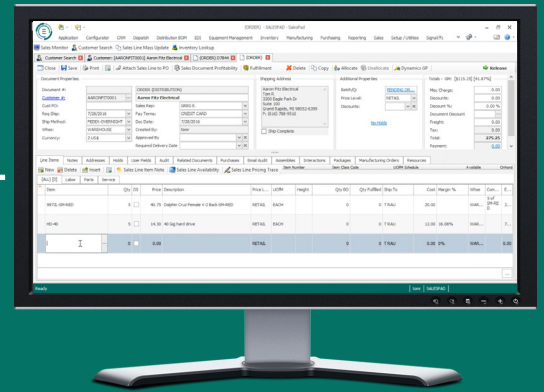




A full front-end order entry, purchasing, and inventory management solution

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📞 616-245-1221



AUTOMATED WORKFLOW

Eliminate bottlenecks throughout your business with enhanced workflow visibility. SalesPad's workflow functionality gives you ultimate control and ensures that only the orders that should leave your warehouse do, eliminating costly errors and reducing holding expenses.

CRM

Utilizing increased customer, interaction, and order visibility, SalesPad gives you all the tools necessary to provide superior customer service.

INTUITIVE USER INTERFACE

Drag-and-drop functionality allows each user to customize the interface to their personal preference and job function. SalesPad Desktop is available in English, Spanish, and French.

SEARCH & USER DEFINED FIELDS

Unlike Dynamics GP, SalesPad Desktop allows for an unlimited number of user defined fields, enabling you to track pertinent information about your customers, inventory, orders, and more. In addition, SalesPad Desktop's Excel-like search function gives users a familiar platform that puts the important information right at their fingertips.

“Instantly, training was easier... We were using a number of separate systems in the past. Now our employees only need to learn SalesPad Desktop.

— ELIZABETH GROSS, STEINER TRACTOR PARTS

SALES ORDER PROCESSING

Fast and accurate order entry means satisfied customers and increased sales. SalesPad Desktop includes a variety of features for streamlined item entry and order processing.

INVENTORY MANAGEMENT

Take better control of your inventory. SalesPad Desktop takes Microsoft Dynamic GP's inventory capabilities to a whole new level. Analyze your inventory, make educated purchasing decisions, and never have a doubt about where your items are located.

MANUFACTURING

Effortlessly build and configure a custom or standard bill of material, which can generate a silent manufacturing order in the background. If your business needs a more simplified approach, SalesPad Desktop provides the ability to process inventory BOMs and assembly transactions.

COUNTER SALES

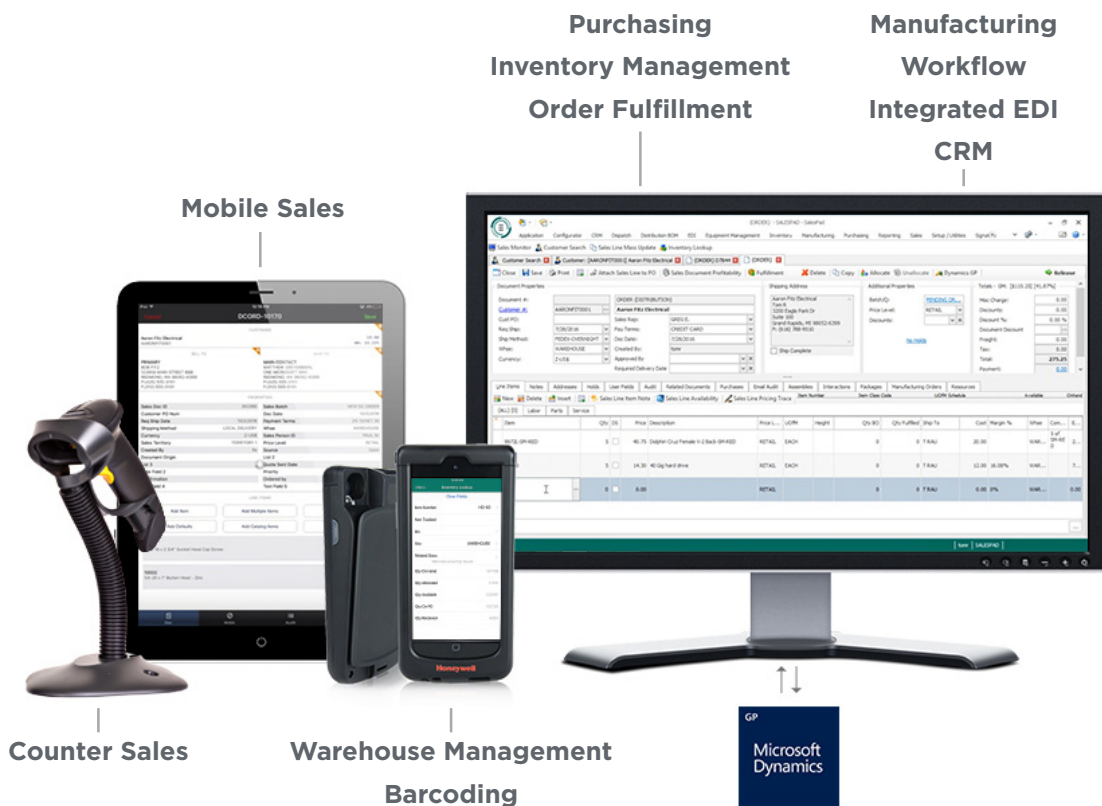
Designed for companies that have a cash-and-carry environment, Counter Sales provides a simple and efficient platform for customer-facing order entry, as well as catalog-style item selection, credit card processing, signature capture, and end-of-day reporting.

**You see inventory.
We see opportunity.**

Learn more at salespad.com/desktop.

OVERSEE AND MANAGE EVERY STAGE OF DISTRIBUTION.

SalesPad Desktop is the ultimate tool for distribution and manufacturing companies. Process orders more accurately and efficiently while having full visibility into each step of your workflow. Simplify the lives of your customer service and sales reps by putting information at their fingertips with powerful Excel-style searching. Operating outside of Dynamics GP cuts down on the cost per seat, and it adds additional levels of security by removing warehouse employees from your accounting environment, and vice versa.



WHY SALESPAD DESKTOP?

SalesPad Desktop is cost effective. Whether you're a small business looking for a more affordable way to employ Microsoft Dynamics GP or your company is outgrowing the functionality of Dynamics GP and needs to expand its capabilities, SalesPad Desktop is elegantly designed to fit your needs (see page 6).

SalesPad Desktop is flexible. A wide array of tools allows you to configure the software to fit your specific needs. Tailor specific modules to fit your current demands and gradually expand capacity as your business grows. Gain

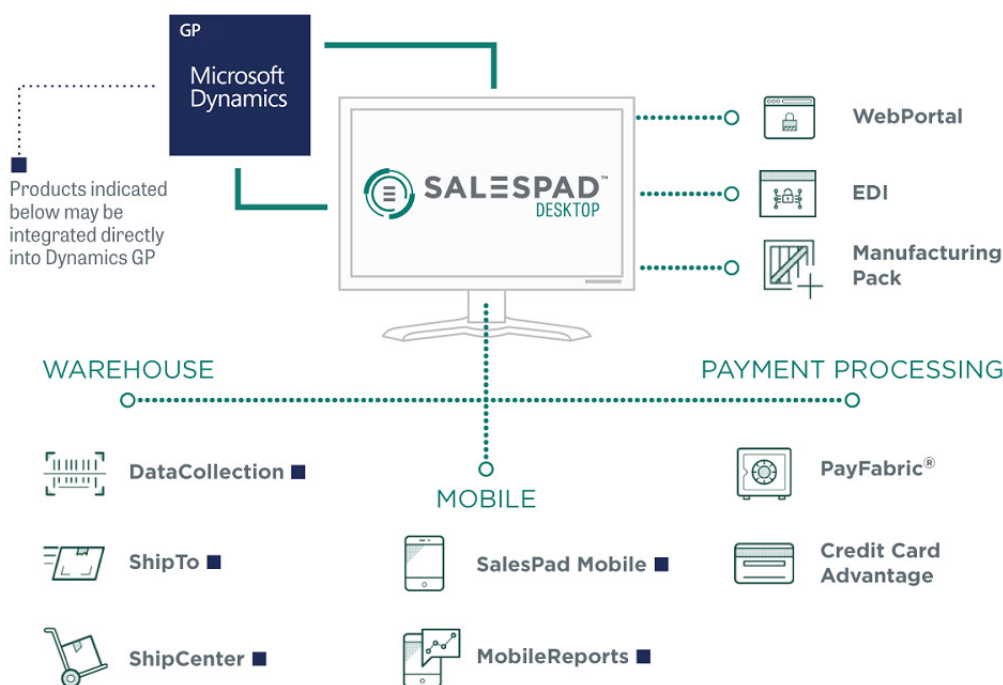
extensive mobile, warehouse, payment processing, and EDI functionality with our other add-on products (see page 3).

SalesPad Desktop is easy to use. The multi-tab, single-screen view brings an intuitive interface to your Microsoft Dynamics GP data and makes that same data more easily accessible. Additionally, SalesPad has a very similar user interface to Dynamics GP, which results in less time training your employees and a smoother transition.

SalesPad Desktop is powerful. Utilize a more robust workflow, sales, purchasing, inventory, and CRM platform for Dynamics GP users.

SCALABLE SOFTWARE FOR SCALING BUSINESSES.

Through our add-on products, SalesPad Desktop is an incredibly scalable solution designed to fit any size company in a wide range of industries. If your business takes a wealth of payments, has an ever-growing amount of supply moving in and out of your warehouse, employees that are constantly on the road, or all of the above, get the perfect functionality to answer the call.



SalesPad Mobile

Your business, everywhere from anywhere.

Access and manage sales, customer, and inventory data while on the go. Give your out-of-office users the power of SalesPad in their pocket, allowing them to never be disconnected from company operations. SalesPad Mobile offers interaction tracking, routing, and signature capture features.

PayFabric

Simple. Flexible. Secure.

With this cloud-based payment acceptance platform and storage hub by SalesPad partner Nodus Technologies, take payments on sales documents while storing customer credit card information in a secure cloud network. Other features include batch credit card processing, customer wallets, and access to the PayFabric online portal.

DataCollection

Warehouse management, with efficiency.

DataCollection is a warehouse management application that integrates fully with Dynamics GP. Operating on a iOS or Windows mobile device equipped with a scanner, users can perform all essential inventory transactions, such as picking, transferring goods, and cycle counts, while DataCollection automatically updates Dynamics GP in real time.

ShipCenter

Your all-in-one shipping solution.

Increase accuracy and efficiency in your shipping operations. ShipCenter eliminates the need for carrier-specific software like UPS Worldship or Fedex Ship Manager. Returning rates and issuing tracking numbers associated with sales documents are done in real time.



Schedule a demo today.

SalesPad EDI

Integrated product fulfillment, simplified.

Employ a ready-made, easy-to-use integration that seamlessly exchanges data out of and into SalesPad Desktop for omnichannel retail operations. Connect to SalesPad partner SPS Commerce's leading cloud-based platform to eliminate manual entry of purchase orders, sales orders, ASNs, and invoices with trading partners.

Credit Card Advantage

Credit card and ACH payment processing for Dynamics GP.

Nodus Credit Card Advantage processes credit cards and ACH/echecks directly inside of Microsoft Dynamics GP. Credit Card Advantage offers fast, accurate verification of electronic payments in a matter of seconds, providing the missing piece that connects your credit card processing to your accounting solution in a secure environment.

Eliminate the need for multiple ISVs.

Find out more at salespad.com/desktop.

“SalesPad Desktop is the most exciting enhancement to Microsoft Dynamics GP I’ve seen since I started selling Dynamics GP 12 years ago. It takes GP to new heights.”

— GEORGE MACKIEWICZ, CAL BUSINESS SOLUTIONS

WebPortal

SalesPad Desktop data on the go.

An efficient, web-based version of SalesPad Desktop, WebPortal enables both external and internal users to access SalesPad from a browser. Give your customers the power to process transactions on their own, freeing up your staff to focus on other tasks.

ShipTo

Shipping that’s smooth sailing, from warehouse to doorstep.

Monitor and manage sales orders to ship products quickly and reliably. ShipTo makes it easy to import your shipment data into UPS WorldShip and FedEx Ship Manager, where it then pulls the shipping rates and tracking numbers for associated sales orders.





Expand the order entry, CRM, inventory management, and workflow capabilities of Dynamics GP. [Schedule a demo today.](#)

EFFICIENT QUOTE AND SALES ORDER MANAGEMENT

The sales document entry window makes it easy to enter any type of sales document in a consistent, configurable, and easy-to-learn screen. With the ability to view and edit multiple tabs simultaneously, users have all the relevant information about a customer or sales document in one place, eliminating the need to search through multiple screens to answer a customer's question. Predefined rules can be configured to control how each document flows through your business process.

IMPROVED INVENTORY VISIBILITY

SalesPad Desktop displays all aspects of your inventory with minimal user navigation. With just a few clicks, you can view item availability, properties, and trends, all while never having to put your customer on hold.

COMPREHENSIVE PURCHASING FUNCTIONALITY

SalesPad Desktop allows users to efficiently generate new purchase orders, or link to existing POs, directly from backordered items on a sales document. This is essential for companies who purchase based on sales demand or have an abundance of non-stock orders. The Purchasing Advisor module displays the items that need to be purchased for all of your inventory locations based on sales demand, taking into account the reorder points for each item. SalesPad Desktop simplifies the generation of purchase orders so that your company can always fulfill your orders on schedule.

USER-FRIENDLY CRM

Great for companies that find it crucial to have full visibility into customer interactions, the CRM module is included with a standard SalesPad Desktop license. Track and segment new opportunities, engage your prospects, and ultimately close more business. Also included is an Outlook integration, which syncs your appointments and emails from SalesPad Desktop to Outlook, and vice versa.

COST SAVINGS

Not only does SalesPad Desktop have an abundance of features that Dynamics GP doesn't offer, it also comes in at a fraction of the cost per license. Don't forget about implementation costs. If you are currently a Dynamics GP user, implementation is painless. There's no need to transfer your data out of Dynamics GP and into a larger accounting system, as SalesPad Desktop integrates directly with Dynamics GP. SalesPad Desktop empowers users to increase their daily output, while eliminating costly operational errors.

ROBUST REPORTING TOOLS

Any successful company needs to be able to thoroughly track data, needed for crucial business decisions. SalesPad Desktop allows for a number of configurable and customizable reporting tools that help monitor the pulse of your business. These come in the form of graphical dashboards, pie charts, heat maps, pivot grids, and many more options.

UNLIMITED USER DEFINED FIELDS

With SalesPad Desktop, your business has access to an unlimited number of user defined fields. This means that you can track any information you want for over 30 different business objects, including customers, vendors, contacts, sales documents, inventory items, and purchase orders. Once a field has been created, that data is immediately available to be searched and reported on.

CONVENIENT COUNTER SALES

The Counter Sales module, included in a standard SalesPad Desktop license, allows for quick entry of sales transactions, barcode/UPC scanning, customer signature, payment collection, and the triggering of a cash drawer. Typically seen in walk-in customer environments, such as a parts desk, Counter Sales is a great option for businesses that don't need a full point of sale system and who value a real-time integration to their accounting system.

CONFIGURABLE DOCUMENT WORKFLOW

Fine tune your business process with easy sales document workflow creation. Workflow Setup allows you to define the criteria, rules, and requirements for a document to ensure that it gets routed correctly. Rules can range from flagging a document for review if the customer has poor payment terms, to splitting the document into multiple orders based on different "Ship To" destinations, to many more. SalesPad flags documents in these workflows, taking the opportunity for error away from the user.

DETAILED MANUFACTURING*

Fully integrated to the manufacturing module within Microsoft Dynamics GP, SalesPad Desktop allows for the creation of manufacturing orders, bill of materials (BOM), and routings. Take it one step further with the Manufacturing Configurator, which creates highly customizable manufacturing BOMs on the fly. SalesPad Desktop also supports distribution BOMs and assemblies.

COMPREHENSIVE ROUTES PLANNING AND DISPATCH*

Create and track routes, deliveries, and service stops. SalesPad Desktop makes it easy to manage all of your vehicles, control their schedule, and optimize routes for efficiency. Drivers can also follow their route, navigate to their next appointment, and look at the sales orders associated with a route stop. Checking in and out of appointments allows management to constantly monitor the efficiency of their drivers.

ADVANCED EQUIPMENT TRACKING

Control the equipment your company sells, services, and maintains. Assign a piece of equipment to a specific customer, track that equipment through its lifecycle, and create service orders as maintenance is needed. Each piece of equipment you sell gets receives its own record, allowing for detailed audit trails, record keeping, and troubleshooting for that item. Utilize SalesPad Mobile with your field technicians to easily view, edit, and complete work orders.

Don't just take our word for it.

Watch our case studies.



▶ See how Picnic Time Family of Brands improved their EDI and order processing with SalesPad Desktop at salespad.net/picnic-time



▶ Watch our interview with National Band Saw to see how SalesPad Desktop simplifies Dynamics GP at salespad.net/national-band-saw

View more case studies at
salespad.com/desktop/case-studies.

**Additional Pricing Applies*

SalesPad Desktop Feature List

SEARCHES

- Excel-style grids
- Wild card searching
- Search by user defined fields
- Export to Excel
- Filter, sort, and save
- Save search layout by user

CUSTOMER/VENDOR

MAINTENANCE

- Create new customers and vendors
- Add/edit/delete contacts
- Create and edit detailed customer and contact-specific notes
- Sales and purchase history by document
- Sales and purchase history by item

SALES ENTRY

- Quotes, orders, invoices, returns
- Detailed item and document notes
- Multiple options for streamlined item entry
- Document copy
- Sales document audit log
- Quick PO to SO linking

CRM

- Enter tasks and reminders
- Outlook integration for syncing emails and appointments
- Log customer notes and contacts
- Generate call lists
- View scheduled activities in a calendar

WORKFLOW

- Customizable for each document type and ID
- Document splitting based on defined criteria
- Automated printing and emailing
- Sales Monitor to view orders by batch
- Full audit trails for visibility

PURCHASING

- Create and edit purchase orders
- Demand-based PO generation
- Reorder point visibility and maintenance
- Generate POs directly from a sales document
- Consolidate demand from multiple sales documents in a single PO
- Print or email POs

CREDIT CARD PROCESSING

- Securely store unlimited customer credit card information in the cloud
- Authorize, charge, void, and return transactions
- View customer credit card history
- Customer wallet

REPORTING

- Pivot-style sales analysis
- On-the-fly item sales by customer
- Graphical dashboards
- Heat maps
- Quick report
- Inventory analysis with sales trends

CUSTOMIZATION

- All grids save user preferences
- All grids are printable and exportable
- Unlimited user defined fields
- Screens can be untabbed for multiple monitor use
- All layouts configurable for optimal user experience

SECURITY

- Define by user and group
- Secure individual screens and tabs
- Restrict access to specific data (i.e. hide cost or margin)

SYSTEM MANAGEMENT

- View active user connections
- View “locked” documents
- System User Card to track user activity
- System Log Search for tracking of permissions/security changes

INVENTORY LOOKUP

- Search by any item criteria
- View item availability across all locations in a single grid
- View lots and serial numbers
- Create and search alternate item catalogs
- Attribute-style searching
- Item sales graph
- Item maintenance

And that's not the half of it. Find out more at salespad.com/desktop.



TERRITORY MANAGERS

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