

SalesPad® 4.0 New Features



New Product

Outlook Add-in for SalesPad GP – This Outlook Add-in allows users to send e-mail from Outlook to the Customer Card CRM Notes in SalesPad. It also allows users to pull tasks, created in SalesPad, to their Outlook Calendar. This Add-in is sold as a separate product. It is licensed per user and is not dependent upon the SalesPad seat count. Please contact SalesPad Solutions or your SalesPad Partner for pricing and ordering information.



New Features

System Functions

Ribbon Menu – SalesPad version 4.0 features a ribbon-style menu instead of a list-style menu, allowing easier access to the most popular SalesPad modules. Users can also configure a Favorites menu and can select the functions they would like to have Auto Start when launching SalesPad.

SalesPad Document Emailing – SalesPad now supports SSL and encrypted emailing for providers such as Google mail.

Smart Printing – Smart Printing may now be configured to automatically email the following: current user, sales representative, shipping email address, and billing email address. Smart Printing will now allow users to configure the use of a default email template.

Multicurrency – SalesPad now supports use of Customer and Vendor default currency when creating new sales documents and purchase orders.

User Defined Fields

- Item Master UDFs will automatically copy to the same Sales Line Item UDF on a Sales Document
- Vendor UDFs will automatically copy to the same Purchase Order UDF
- Customer Master UDFs will automatically copy to the same Sales Document Header UDF
- Customer UDFs and Vendor UDFs are added to Search grids automatically
- Smart Hyperlinks (UDFs) - create a user field on Inventory Item
- Vendor user fields can now be mapped to the GP user defined fields

Recent Documents & Recent Customers – When enabled in Security, these two functions are now available on the Sales menu. Opening them adds two sections at the bottom of your SalesPad window that will show the most recently accessed sales documents and customers.

Settings – Users can now export settings from SalesPad and import them to another company.

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New Settings

AvaTax Address Validation – allows AvaTax users to set up address validation for Customer Card contact addresses and the Ship To address on a sales document, any time they are saved/updated

Authorization Up Charge Percent – This setting allows SalesPad to automatically upcharge credit card authorizations by a specified percentage.

Item Master Field for Sales Line Item – This setting automatically populates the Line Item Comment field with the specified item master field value. The specified field may be either a SalesPad Item User Defined Field or any existing Dynamics GP Item Master Field.

Default Items to Non-Inventory – If an item is added to an order and that item is not found in Inventory Lookup (doesn't exist in the item master) it will by default be added to the order (sales document) as a non-inventory item instead of triggering the Inventory Lookup window.

Show Pop Up Save Message – Allows the option to show or not show the save notification when saving a sales document for the first time.

Sales Related Functions

Sales Batch Processing – Sales Batch Processing now allows for batch faxing and the use of email templates.

Sales Transfers – The Sales Transfer function creates an Inventory Transfer transaction for all items included on a Sales Document. When the Sales Transfer is completed, the originating sales document is moved to history. The resulting Inventory Transfer transaction must be posted in Dynamics GP.

Equipment Management – allows users to track sales and service history for specific (serialized) inventory.

Sales Document Tasks – Configuration settings allow the automatic generation of a CRM Task whenever a sales document is created. Tasks may also be automatically scheduled based on specific line items added to the order.

Automatic PO Generation – Automatically creates purchase orders based on sales document line items, using the Vendor smart field for sales lines. It can also automatically send the Purchase Order to the appropriate email address from the Vendor Card. Purchase Orders may be automatically generated for any line item where the Purchase Status is “Needs Purchase” and where a Vendor has been specified.

On Load Scripting for Sales Document Entry – allows users to create C# scripts executed when a sales document is opened. For example:

- If a customer is on-hold, a script could be written to change payment terms to cash only
- If customer class is equal to X, then default the sales document type to a specified type

Sales Line Special Pricing Import – allows users to import special pricing from a sales document onto the Customer Card Special Pricing tab

Credit Card Processing – Users can now remove expired pre-authorizations from a payment on a sales document. This function is only supported for SalesPad users who are using Authorize.Net as their payment processor.

Customized Sales Document Headers – Users may now create a customized Sales Document header for each Sales Document Type ID. Security exists to control which users can edit document headers.

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Profitability Plugin – Users may now create a pre-load script to be executed when the Profitability plugin is opened. Users may now specify (in Security Editor) where cost will be pulled from. The Profitability window can now be configured to allow users to view details on the last five Purchase Receipts of items displayed in the window.

Cash Receipts – Cash Receipts allows users to enter and save new cash receipts. Cash and Check payment types are allowed.

Cash Application – Cash Application allows users to view unpaid invoices and apply unapplied payments and credits.

Blanket Order Release & Blanket Order Invoice – Blanket Order Release converts selected quote IDs into orders, which can then have pick tickets printed. Blanket Order Invoicing converts the orders to invoices. At the end of the process, the original quote will update the Qty fulfilled based on the final invoice.

Fulfillment Order – Users can now open Fulfillment orders as Read Only.

Voided Documents – Users can now open Voided documents as Read Only.

Audit tab – The Sales Document Audit tab now logs use of the Back button, copied documents, and when quotes are transferred to orders. The Sales Document Audit tab now tracks user changes to notes.

Historical Documents

- The balance due showing on the header of a historical invoice now reflects any amounts written off.
- Users can now view payment information on a historical document.

Counter Sales

- Standard SalesPad Order Processing plugins are now available on the header of a Counter Sales transaction. Among other things, this allows users to manually fulfill quantities when items included on the transaction are under serial #, lot #, or multi-bin control.
- Users may now add New Customers directly from the Counter Sales screen. After adding the new customer, the Counter Sales Customer search will default to that customer.
- Counter Sales now supports the use of C# scripts to execute specific processes when creating and modifying Counter sales documents.
- Swiping a credit card in the Payment Window of Counter Sales will populate Card Number, Cardholder Name, Card Name, and the Expiration Date fields.

Customer Card Related Functions

Country Code on the Customer Address Card – Users may now select a Country Code from a pre-defined list on the Customer Address card. This list is maintained in Dynamics GP.

Gross Margin Column – Using the Column Chooser, users may now add the Gross Margin column to the grid on the Sales Documents tab on the Customer Card.

Customer Address Card – Sales Person ID and territory are now visible in the Sales Person ID drop-down on the Customer Address card.

Customer Special Pricing – Now supports date ranges and quantity ranges

Customer Card Banner – Users may now use C# scripting to add a customized banner to the Customer Card.

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Purchasing Related Functions

Purchasing Print Dialog – The standard SalesPad print dialog is now used for printing purchase orders. This allows users to have unlimited PO formats for printing. Users can now fax or email purchase orders directly from the print dialog using predefined email templates.

Purchase Order Entry – Changing the date on a PO will now roll the revised date to all line items.

Vendor Special Costing – Similar to Customer Special Pricing, Vendor Special Costing allows users to set special costing that will override the current cost or standard cost on a Purchase Order Line Item.

Matrix Purchasing – Line items may now be added to a Purchase Order using the standard Matrix Entry functionality. The Matrix Entry window will automatically open when adding an Item with a Matrix Class Definition to the Purchase Order.

Audit tab – Audit tab is now available on Purchase Orders.

Country Code on the Vendor Address Card – Users may now select a Country Code from a pre-defined list on the Vendor Address card. This list is maintained in Dynamics GP.

Inventory Related Functions

Item Pop-Up Notes – An item's Item Notes can be configured to pop up when that item is added as a line item to a Sales Document. This is accomplished by enabling the Sales Line Item Note security setting.

Item Maintenance

- Vendor Item Number and Item Description are now editable from Item Maintenance, on the Item Maintenance Vendor Information tab. Item Maintenance is opened from the Item Properties tab in Inventory Lookup.
- Shipping weight is now editable from the Item Maintenance window.

Auto Item Conversion – When properly configured, SalesPad can automatically convert 3rd party items into inventory items.

Inventory Transfers – Inventory Transfers no longer requires Multi-bin to be enabled.

Item Replacement – This plugin allows users to define the relationship between an inventory item and its replacement item. During sales document entry, a user entering an item with a defined replacement will be presented with a window showing the line item, the replacement item, and the available quantities of each.

For more information on the new SalesPad® features in this list, visit <http://www.salespad.net/new.aspx>