

# SALESPAD<sup>®</sup>

Optimize your profitability and efficiency across the customer-to-cash cycle

**Increase control, improve margin, and reduce operating costs with a solution that outperforms Microsoft Dynamics GP on almost every metric.**

Boost efficiency, accuracy, and profitability with SalesPad<sup>®</sup>, a comprehensive order intelligence solution that drives efficiency and profitability. While GP is a robust ERP and a decent fit for most industries, it wasn't specifically designed to meet the unique needs of distributors. SalesPad, on the other hand, was built by experts to address specific business challenges distributors are facing. From powerful CRM to workflow automation to advanced quote and order entry, with SalesPad, you'll supercharge your order management processes and raise gross margin at every turn with a solution tailored to fit your needs.

### **Built by distributors, for distributors**

As industry experts, we know that you're looking for more efficient order routing, faster order processing, and simplified invoicing. That's why we built SalesPad, to be the best order management and order intelligence platform for Dynamics GP users.

### **Cost-effective**

Whether you're looking for a more affordable way to leverage Microsoft Dynamics GP or you are outgrowing its functionality, Salespad suits your needs.

### **Flexible**

With a diverse range of features, configure this software solution to fit your preferences. Gain even more tailored functionality with add-on products.

### **User-friendly**

Get the most out of your Microsoft Dynamics GP data with an intuitive interface that's easy to use.

### **Powerful**

Unlock your potential with robust workflow automation and order management features to keep your operation running smoothly.

"I think the number one thing that keeps us with Cavallo<sup>®</sup> and their SalesPad<sup>®</sup> product is there's nothing else like it. **There's really no way to perfect what they have done.** Order management, customer management, product management, and the entire workflow oversight that you just simply cannot find anywhere else."

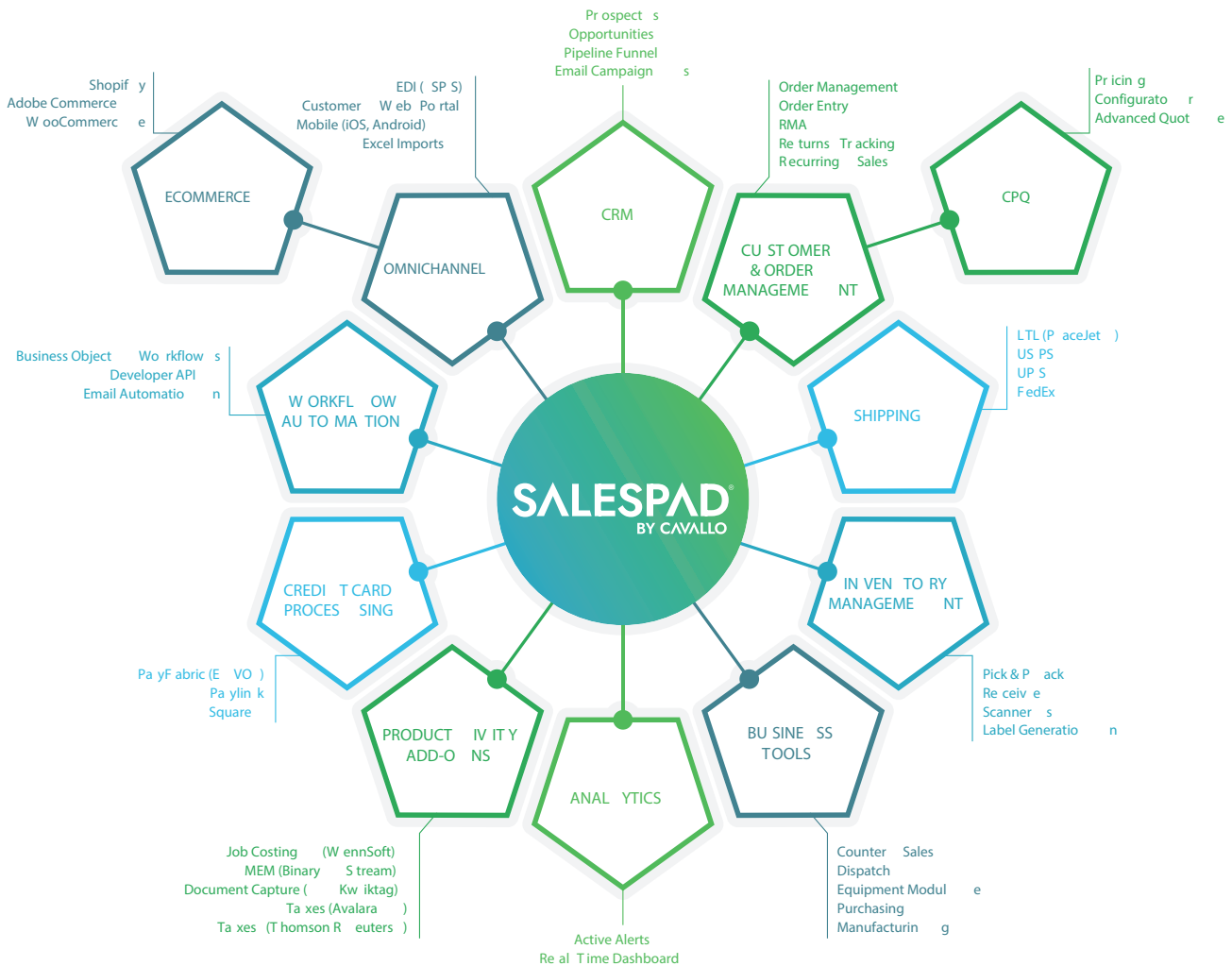
- **Paul McLellan**, President, Lightbulbs.com



**Tasks that typically take minutes in Microsoft GP take only seconds in SalesPad®**

The results speak for themselves. A 200% increase in order throughput, 85% reduction in time to quote, 100% pick pack accuracy, and a 3% increase in gross margin within only two months of going live. SalesPad® saves you significant time and money, making your operations more efficient while maximizing profits—and provides a return on investment so big you'll wish you had it yesterday.

-  Higher profit margins
-  Increased productivity
-  Extremely satisfied customers
-  Simplified processes



“We’ve been able to consistently **grow our existing customer base by over 25%** by having the toolkit we have with SalesPad.”

- **Gabe Miller**, Executive Vice President of Sales, geckobrand



## A Suite of Operational Features, Optimized for Your Needs

### Breakthrough workflow automation

Spend less time on tedious, repetitive tasks and more time getting back to the parts of business that matter. With powerful workflow automation capabilities, radically expand your gross margin by allowing users to manage order-level pricing and profitability at scale, and automate processes that would normally require manual input and hours of effort.

Leverage the power of AI and workflow automation to:

- Streamline end-to-end workflows from creation to fulfillment
- Track open sales documents from start to finish
- Define and set rules that block problematic orders, such as those with low margins
- Automate critical activities like importing data, emailing documents, and invoicing batches

Doc #	Customer	Doc Date	Warehouse Code	Total
Batch: W-NEW ORDER				
WORD0150	Aaron Fitz Electrical	11/13/2023	WAREHOUSE	148.78
WORD0151	Aaron Fitz Electrical	11/13/2023	WAREHOUSE	124.47
WORD0152	Aaron Fitz Electrical	11/13/2023	WAREHOUSE	124.47
3				397.72
Batch: W-MARGIN REVIEW				
WORD0072	Aaron Fitz Electrical	11/08/2023	WAREHOUSE	73.50
1				73.50
Batch: W-BACKORDER				
WORD0063.2	Aaron Fitz Electrical	11/10/2023	WAREHOUSE	110.25
WORD0096	Aaron Fitz Electrical	08/08/2023	WAREHOUSE	29.76
WORD0146.2	Aaron Fitz Electrical	11/08/2023	WAREHOUSE	9.03
3				149.04

Defined workflows make processing orders easy and automatic, giving you full control

### User-friendly CRM

Improve your bottom line by accelerating sales, delivering better customer service, and effectively monitoring pipeline performance. The CRM feature breaks down silos that limit access to important data about customers, sales, and inventory—so vital information is readily available whenever it's needed.

Overcome your greatest order management challenges by:

- Increasing quote and order accuracy
- Eliminating unnecessary delays to better sales and customer support
- Improving visibility into the sales pipeline and funnel
- Identifying up-sell and cross-sell opportunities
- Efficiently managing leads, prospects, and customer interactions to generate new business
- Spending less time tracking down sales documents
- Easily keeping customer information up-to-date

“SalesPad® has helped make our company more agile when interacting with customers. From a CSR standpoint, **we’re able to better serve both big and small customers.** SalesPad helps speed up our customer interactions and helps us give the customer more information than we ever could before.”

– Jeff Downs, CEO, Hoy Shoe Co.



### Advanced quote and order entry

Enhance your order intelligence with the advanced quote and order entry feature. From entering orders to editing documents to creating invoices, every step of the customer-to-cash cycle is streamlined, so your sales teams can spend less time on tedious, error-prone tasks and more time selling.

Key time-saving features:

- Simplified order entry
- Quick inventory and customer lookup
- Blanket orders function to create pick tickets and invoices
- Support for Distribution BOMs and Manufacturing BOMs
- Exploding GP Kits into Packages for visibility and editing
- Importing sales lines onto sales documents from Excel/CSV
- Advanced sales configuration like CrossSell/UpSell, Quick Pick, Matrix Items, and Customer Default Items
- Advanced item configuration like Item Attributes, Barcodes, Restrictions, and Substitutes

“Prior to SalesPad, order accuracy was a problem. We would miss notes that were pertinent to the carrier, such as whether it was a driver unload, or the driver appointment number. Before, we could miss that, but now it’s just there automatically. We know it’s there — **we’re confident it’s there.**”

– **Cara Fleming**, Order Processor, Handi-Craft Co.

### Simplified receivables

Consolidate critical information in the customer card, track current balances and order history in minutes, easily add additional notes and relevant information, and simplify your transaction entry process with the receivables feature.

Easily access customer AR information, including:

- First or last invoice
- Last payment
- Statement dates
- Customer aging
- Total balance outstanding
- Minimum payment
- Credit limit

A/R Measures	
Year To Date:	Average Days to Pay: 50
Life To Date:	50
	Date: Amount:
First Invoice:	8/14/2023
Last Invoice:	10/10/2023 500.00
Last Payment:	10/10/2023 500.00
Last Statement:	2/15/2027 19,891.51
Unapplied Amt:	500.00
NSF YTD:	0.00
Num. NSF YTD:	0

All of your AR information lives in one place, where it can be viewed and managed with ease



### Recurring Sales

Implement the recurring sales feature to easily generate templates for recurring documents like service contracts and monthly invoices. Create an unlimited number of templates and view them all directly within SalesPad, so it's easy to recreate and organize any document you need.

Leverage recurring sales to:

- Easily create reusable templates based on previous sales documents
- Compile a list of all recurring sales for each customer, then release to the appropriate workflow queue for processing
- Automatically generate recurring sales documents for customers
- Improve security by determining employee clearance based on role

Recurr. Date	Sales Doc ID	Sales Doc Type	Customer Num
=	#c	#c	#c
8/1/2023	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
9/1/2023	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
10/1/2023	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
11/1/2023	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
12/1/2023	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
1/1/2024	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
2/1/2024	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
3/1/2024	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
4/1/2024	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>
5/1/2024	GA-ORD	ORDER	<a href="#">AARONFIT0001</a>

Eliminate repetitive tasks to save your employees valuable time and effort

### Customizable user-defined fields

Create, edit, and organize user-defined fields as needed to accommodate your specific requirements, and automatically store them within SalesPad for easy access.

Accommodate every aspect of your business with UDFs in SalesPad:

- Create user fields on over 60 different business entity types, from customers and sales documents to purchase orders and item masters
- Choose from a variety of basic field types, including text, date, numeric, and checkbox
- Enable advanced options, including Value Options, Read Only, Image, File Attachment, Hyperlink, Rich Text Memo, Customer Lookup, and Quick Report
- Edit and copy user fields once they are created
- Import and export user fields quickly
- View and edit user field values on business entities throughout the SalesPad ecosystem

“It’s a game-changer. Cavallo® has the ability to **instantly access anything right from your laptop**. When we migrated to Cavallo SalesPad, we consolidated and centralized purchasing to just one person, spending three hours per day. **I don’t think you could put a dollar amount on it, but we did throw around a number of about \$250,000**. Cavallo has been a huge improvement to our operations and I don’t think we could migrate to anything else.”

- **Cara Fleming**, Order Processor, Handi-Craft Co.



### Comprehensive purchasing functionality

Leverage the purchasing feature to pare down your safety stock and make data-driven, profitability-boosting stocking decisions. Shockproof your procurement process, ensuring that your team restocks at the right pace, so you're only paying for inventory that will make you money.

Improve your stocking and inventory management with the purchasing feature by:

- Eliminating overspending and stockouts
- Reducing levels of safety stock
- Managing vendor information and interactions
- Tracking sales and purchase orders
- Meeting customer demand in a timely manner
- Maintaining an organized, optimized warehouse

### Pricing

Modify and customize product prices directly in SalesPad, and choose from a wide variety of pricing options with the pricing feature. Reduce your typical quoting time by 50% with clear visibility over past prices and inventory availability, and direct your efforts towards revenue-generating opportunities instead.

Key features:

- Specialized discounts
- Aggregate pricing
- Personalized costs
- Promotions
- Contract pricing
- Group-based pricing
- Customer-specific pricing

Item Number	Description	Short Name:	Class	Type	List Price:	List Multiplier	New List Price	Standard Cost:	New Multiplier	New Std Cost
MBAM1	MacBook Air with ...	MacBook Air	RETAIL	Sales Inventory	999.00	1.05	1048.9500000	750.00	0.80	799.20
MBAM2	MacBook Air with ...	MacBook Air	RETAIL	Sales Inventory	1,199.00	1.05	1258.9500000	900.00	0.80	959.20
MBAM1-2	MacBook Air with ...	MacBook Air	RETAIL	Sales Inventory	0.00	1.05	0.0000000	0.00	0.80	0.00
APPBUNDLE-MBA...	Apple Bundle	Apple Bundle		Kit	1,998.00	1.05	2097.9000000	0.00	0.80	1,598.40
APPBUNDLE-MBA...	Apple Bundle	Apple Bundle		Kit	2,019.00	1.05	2119.9500000	0.00	0.80	1,615.20
APPBUNDLE-MBA...	Apple Bundle	Apple Bundle		Kit	2,981.92	1.05	3131.0160000	0.00	0.80	2,385.536
APPBUNDLE-MBA...	Apple Bundle	Apple Bundle		Kit	2,811.92	1.05	2952.5160000	0.00	0.80	2,249.536
APPBUNDLE-MBA...	Apple Bundle	Apple Bundle		Kit	2,590.92	1.05	2720.4660000	0.00	0.80	2,072.736
MBAM1V2	MacBook Air with ...	MacBook Air	RETAIL	Sales Inventory	999.00	1.05	1048.9500000	750.00	0.80	799.20
APPBUNDLE-MBA...	Apple Bundle	Apple Bundle		Kit	2,368.00	1.05	2486.4000000	0.00	0.80	1,894.40

Maintain complete control of your pricing, including discounts, promotions, and more

“We’ve been able to take advantage of **the pricing features in SalesPad** to make **our business better**. When SalesPad introduced customer discounts, it helped us structure sales programs that attracted national customers, and it allowed us to create a new incentive program for other customers. **That was a really nice business driver for us.**”

– Robert Chadwell, Owner, Chadwell Supply



**Resources**

Spend less time hunting down attachments and sorting through emails when you can easily create, edit, and migrate documents right in GP. With this feature, save time and avoid errors in the future by keeping critical information right at your fingertips.

With the resources feature in SalesPad, your team can:

- Attach any file type (scanned documents, images, spreadsheets, PDFs) to business objects
- Make critical documents available and easy to locate
- Attach resources to business entities like customers, sales documents, vendors, purchase orders, and item masters
- Enable AutoPrint to automatically send resources as part of a workflow
- Ensure a resource follows a business object when it is converted or moves through the sales cycle

“If you are a distributor, you need SalesPad. The user interface is intuitive and easy to use. The workflow capability is phenomenal. Unlimited user-defined fields. Customizable layouts. And all easily learned and handled by your team. You won’t find a better software to help your Inventory, Purchasing and especially Sales Teams manage your business.”

- Roger A Vander Lugt, Senior Consultant, Enavate

**Convenient counter sales**

Easily conduct over-the-counter sales on the fly. This feature can be used as a quick order entry system, allowing you to complete sales for the occasional walk-in customer, or make sales offsite with just a few clicks.

Make sales quick and easy with these functions:

- Accept cash, check, and credit card payments with EMV support
- Create multiple stores and drawers
- Easily search inventory, or use a barcode scanner
- Manage user access and security levels

Summary - GA-ORD0021

Document Properties

Document #: GA-ORD0021 ORDER (GA-ORD)

Sales Rep: PAUL W.

Pay Terms: NET 30

Price Level: RETAIL

Ship Method: LOCAL DELIVERY

Whse: WAREHOUSE

Customer Information

Customer #: AARONFIT0001

Customer: Aaron Fitz Electrical

Contact:

Address: Aaron Fitz Electrical  
2349 32nd St. N  
Chicago, IL 60608-3444  
USA  
P: (616) 245-1221

Comment:

Sales Totals

Misc Amount:	0.00
Discount:	0.00
Discount %:	0.00%
Subtotal:	10.00
Tax:	1.03
Total:	11.03

Easily conduct over-the-counter sales with the same level of control and efficiency as a normal order



### Advanced equipment tracking

The equipment feature in SalesPad is your all-in-one tool to effectively manage inventory. Quickly and easily track the sales and service history of specific serialized items, and leverage additional plugins to efficiently assign equipment, create rental orders, and add or update rental items.

Improve your organization of serialized equipment with the following capabilities:

- Complete equipment lookups in a fraction of the time
- Set up workflow in equipment monitor to manage repairs, service, and warranties
- Access and manage item and equipment history, warranties, user fields, resources, contracts, and more in the equipment card

### Optional add-on products

Extend your SalesPad environment with add-on modules designed to accelerate and enhance every stage of the customer-to-cash cycle. Fail-proof your inventory operations and ensure 100% accuracy when receiving, picking, and transferring inventory. Carry the full power of SalesPad in your back pocket and keep your business running smoothly from anywhere. Get more out of your web store and access up-to-the-minute accuracy on sales and inventory data. Arm your business with the tools you need to improve your bottom line and run more efficiently.

“SalesPad has allowed us to continue growing without having to add more employees. **It has allowed us to be more efficient with what we do.** All of our SalesPad products have played a huge part in helping us handle the increasing volume as we’ve grown.”

- Jeff Downs, CEO, Hoy Shoe Co.

Tracking and managing equipment is made simple with SalesPad

The screenshot displays the SalesPad interface for an equipment card. At the top, a yellow banner states: "This Equipment is under Warranty until 11/6/2024." The main content is divided into several sections:

- Equipment Properties:** Includes fields for Equipment / Serial Number (20221005\_00637), Equipment Description, Item Number (IPHONE 128GB), Item Description (IPhone 128 GB), Equipment Type, and Queue (with an Inactive checkbox).
- Rental Info:** Includes Customer Number (AARONFIT0001), Customer Name (Aaron Fitz Electrical), Rental Item Number, and Rental Order Number.
- Assigned Address:** A dropdown menu currently empty.
- Warehouse Address:** A dropdown menu showing "WAREHOUSE 4300 West Elm St. Chicago, IL 60601-4300 P: (312) 555-0103 F: (312) 555-0103".

Below these sections is a navigation bar with tabs: Item History, Equipment History, Returns Tracker History, Service Orders, Quick Report, User Fields, Audit, Notes, Resources, Contract, Warranty, and Troubleshooting. The "Warranty" tab is active, showing:

- Warranty Info:**
  - Warranty Type: 1 Year
  - Installed Date: 11/6/2023
  - Warranty Start Date: 11/6/2023
  - Extended Warranty Start Date: [empty]
  - Shipped Date: 11/6/2023
  - Warranty End Date: 11/6/2024
  - Extended Warranty End Date: [empty]
- Service Plan:**
  - Service Plan Type: Plan A
  - Service Plan Start Date: 11/6/2023
  - Service ID: 35621
  - Service Plan End Date: 11/6/2024
- Past Warranties:** A table with columns: ID, Warranty Type, Customer Num, Billing Address, Installed Date, Warranty Start Date, and Warranty End Date. The table is currently empty.

