

# Mobile Sales Fact Sheet

Last Modified on 06/18/2026 9:52 am CDT

## Customer Connections

- Designate frequently accessed Customers as favorites.
- Display Customer information including *Address, Phone, Salesperson, Location*, and more.
- Set the Sales person, location, and email address by user ID.
- Filter Customer criteria by *My Customers, Location, or Classification*.
- Retrieve Customer data, view inventories, and create and track orders.
- Add and edit Customer contact information.

## Data to Close the Sale

- Add or edit a Sales Order while viewing allocation details and previous Product/price information.
- Calculate *Margin %* based on selected cost or price for new Sales Orders or Quotes.
- Optionally start with the *Margin %* to calculate the price on the Product.
- View price history of Products purchased by Customer and date.
- Designate up to five discounts per Sales Order by percent or unit dollar and view the calculated net price.
- Look up Products to check the amount-on-hand by a specific Location or all Locations.
- View or add Product Quotes and set a Quote *Expiration Date*.
- View allocated Products at specific prices.
- Calculate a Customer's payoff information.
- View A/R credit information including current balances, Bookings, and credit limits.
- Create unloaded Delivery Tickets and designate as *Pickup* or *Deliver* when preauthorized in Agvance.

## Features

- Access from mobile devices. The app is specifically designed for use on an iPad.
- Connect to live Agvance data in the app through Agvance web services.
- See allocated dollar amounts by Salesperson.
- Add or edit CRM Journal Entries in the app to sync with Agvance CRM.