

Mobile Sales Fact Sheet

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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 & 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 5 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 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 pre-authorized in Agvance

Features

- Access from mobile devices – app specifically designed for use on the 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