

# Sales & Merchandising Automation

A brand new sales experience



		POPULAR	
FEATURE	ULTIMATE	CORPORATE	PRO
Sales Platform - Sales Automation			
Native app on iOS, Android, Windows 10	✓	✓	✓
Full offline functionality with Auto Sync	✓	✓	✓
Portrait & landscape presentation mode	✓	✓	✓
Branding	✓	✓	✓
Multi-lingual configurations	✓		
User defined fields	✓	✓	✓
User hierarchy	✓	✓	
User defined tables	✓		
User roles/profiles	✓		
e-Catalog Showcase your products			
Multiple catalog views	✓	✓	✓
Offline product attachments	✓	✓	✓
Configurable views	✓	✓	✓
Favorite lists per sales rep	✓	✓	✓
Wish-lists / Line sheets per account	✓	✓	✓
Product “hints”	✓	✓	✓
Automatic image management	✓	✓	✓
Export and share products	✓	✓	✓
Configurable attributes per item	✓	✓	✓
Multiple catalogs	✓	✓	
Smart search/Filters	✓	✓	
Mobile Order Taking - Take orders in the field using phone or tablet			
Quick Order	✓	✓	✓
Order by product variants (pre-pack/mix&match)	✓	✓	✓
Decimal quantity ordering	✓	✓	✓
Barcode based ordering	✓	✓	✓
Product inventory display	✓	✓	✓
Product inventory calculation	✓	✓	✓
Configurable, flexible cart	✓	✓	✓
Online and offline printing of the cart	✓	✓	✓
Sales transaction configuration	✓	✓	✓
Order Management - View edit and approve sales orders			
Order workflow and business guidelines	✓	✓	✓
In-order process alerts	✓	✓	✓
View order statistics	✓	✓	✓

\*Note: features supported on iOS Contact us for Windows/Android feature compatibility.



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Order (sales transaction) information	✓	✓	✓
Submission workflow	✓	✓	✓
Share sales transactions	✓	✓	✓
Duplicate transaction within and between accounts	✓	✓	✓
Configurable sales transaction PDF	✓	✓	✓
Define multiple transaction types, e.g. order, return, invoice	✓	✓	
View sales history including back office sales	✓	✓	
Customized workflow and UI per transaction type	✓	✓	
<b>Pricing</b>			
Multiple prices per item	✓	✓	✓
Multiple prices per account	✓	✓	✓
Sales rep discount permissions	✓	✓	✓
Multiple price lists	✓	✓	✓
Special pricing within price list (price list hierarchy)	✓	✓	✓
Configurable discounts using calculated business rules	✓		
<b>Cross-sell &amp; upsell</b>			
Present items with special offers in the catalog	✓	✓	✓
Create cross-sell & upsell campaigns	✓	✓	
Multiple campaign types	✓	✓	
<b>Mobile CRM - 360 view of customer interactions</b>			
Account Management	✓	✓	✓
Manage multiple contact persons per account	✓	✓	✓
Account tracking and history	✓	✓	✓
Account dashboard	✓	✓	✓
Configurable attributes per account	✓	✓	✓
Account pricing and payment policy	✓	✓	
Configurable account dashboard	✓	✓	
Catalog assignment	✓	✓	
Multiple account types	✓		
<b>Mobile Merchandising - Plan and monitor in-store activities</b>			
Schedule reminders	✓	✓	✓
Stock taking	✓	✓	
Custom audit forms	✓	✓	
Custom surveys	✓	✓	
Custom in-store activities	✓	✓	
Geo-tagged picture taking	✓	✓	

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Create and manage account visits	✓	✓	
Store display management	✓	✓	
In-store activities dashboard	✓	✓	
Send email notifications for activities	✓	✓	
Configurable activity types and fields	✓	✓	
Share activities and account info among reps	✓	✓	
Push notifications	✓	✓	
Reminders synced to Calendar/Outlook	✓	✓	
Manage tasks	✓	✓	
<b>Route Accounting</b>			
Van sales and inventory tracking	✓		
Ability for rep to carry inventory, sell and invoice from van	✓		
<b>GPS &amp; Maps</b>			
GPS navigation to customers	✓	✓	✓
View accounts near you	✓	✓	✓
Color map pins by account status/properties	✓	✓	✓
Route analytics	✓		
<b>Route and Activity Planning</b>			
Stay up to date on rep activity in the field	✓		
Calendar planning view for reps	✓		
Plan sales rep schedules on a map	✓		
<b>Sell-Through</b>			
Replenishment recommendations	✓		
Sell-through reports and statistics	✓		
<b>Sales Team Management</b>			
User management	✓	✓	✓
Define and track rep targets	✓	✓	✓
Sales rep monthly revenue targets	✓	✓	✓
Target dashboard for managers and reps	✓	✓	✓
Messages	✓	✓	✓
Sharing of sales activities	✓	✓	✓
Sales rep targets per catalog			

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