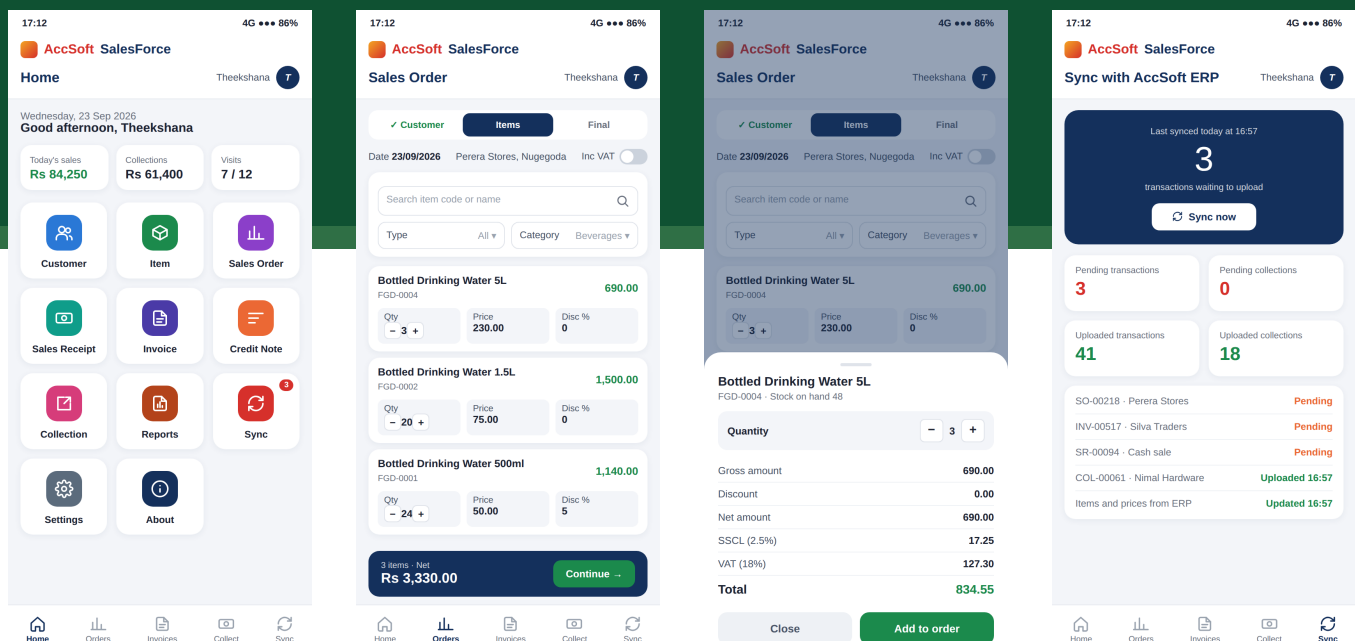


Mobile Sales Force

Your sales reps sell from the phone, and the ERP knows by the time they leave the shop

AccSoft SalesForce is the Android app for field sales teams. Reps take sales orders, raise invoices and sales receipts, issue credit notes and collect payments at the customer's counter, with the latest items, prices and customer balances from AccSoft ERP on the phone. It works with no signal and uploads everything when the rep taps Sync.



Home, Sales Order items, item total with SSCL and VAT, and Sync with AccSoft ERP

Works without signal

Every document is saved on the phone and uploaded when the rep taps Sync

Orders, invoices, receipts

Sales order, invoice, sales receipt and credit note in three steps each

Collections

Cash, cheque and post-dated cheque against specific invoices, printed on the spot

Straight into the ERP

Uploads arrive as documents for approval; balances and prices come back down

What the rep does from the phone

The home screen is eleven tiles, one per job.

Tile	What it does
Customer	Route customers with address, contact, credit limit, outstanding balance and ageing, refreshed at each sync
Item	Price list with stock on hand, by type and category, with item pictures
Sales Order	Three-step order (Customer, Items, Final) for delivery from the warehouse
Sales Receipt	Van sales, where goods are handed over and paid for on the spot
Invoice	Credit sales invoiced at the customer's counter against their credit limit
Credit Note	Returns and price adjustments raised on the spot
Collection	Cash and cheque collections against outstanding invoices, with post-dated cheque details
Reports	The rep's day summary, outstanding by customer and target vs actual
Sync	Upload transactions and collections, download items, prices and customers
Settings	Printer pairing, default location and rep preferences
About	Version and licence

Taking a sales order in three steps

1	Customer Pick the customer from the route list. Outstanding balance, credit limit and last order are shown before the rep starts, so an over-limit customer is caught at the first step.
2	Items Search by code or name, or filter by type and category. Each item opens a card with the quantity stepper, price, discount and line total; the totals sheet shows Gross, Discount, Net, SSCL (2.5%), VAT (18%) and Total before Add to order.
3	Final Review the lines, add a memo and delivery date, choose Amount Inc VAT if the customer is quoted tax-inclusive, and save. The order is queued for upload and printed on a Bluetooth printer if the customer wants a copy.

The same three steps are used for Invoice, Sales Receipt and Credit Note, so a rep learns the app in one morning.

Works without signal, syncs with one tap

- Every order, invoice, receipt, credit note and collection is saved on the phone first, so a shop with no coverage never stops a sale
- The Sync screen shows Pending Transactions and Pending Collections with a count, and Uploaded Transactions and Uploaded Collections once they reach the ERP
- Tap Sync to upload everything pending and download the latest items, prices, customers and balances
- Uploaded documents appear in AccSoft ERP as sales orders, invoices, receipts, credit notes and customer payments, ready for approval and posting
- The Sync tile on the home screen carries the pending count, so nothing is left on the phone at the end of the day

Key features

Built for the rep

- Large touch targets, quantity steppers and a bottom navigation bar for one-handed use
- Item pictures on the price list
- Today's sales, collections and visits on the home screen
- Runs on ordinary Android phones and tablets

Credit control on the road

- Credit limit and outstanding balance shown before the order is taken
- Overdue invoices flagged on the customer card
- Collections applied to specific invoices

Control from the office

- Each rep logs in with their own user and sees only their customers, items and locations
- Uploaded documents are approved in the ERP before they post
- Rep-wise sales, collections and visits on the ERP dashboard and reports

Pricing and tax

- Price levels per customer from the ERP
- Line and bill discounts within the rep's limit
- VAT and SSCL per line and on the total, with an Amount Inc VAT option

Collections and printing

- Cash, cheque and post-dated cheque with bank, cheque number and date
- Receipts printed on a Bluetooth thermal printer with logo and VAT details
- Collections upload separately, so the office sees the day's cash at sync

Integrated with AccSoft ERP

- Customers, items, prices, stock and balances maintained once in the ERP
- Sales orders become invoices, purchase orders or BOMs; collections post to Sales & Debtors and the Cash Book
- Dashboard graphs reflect uploaded sales the moment they sync

Why AccSoft SalesForce?

No re-keying	Orders taken in the field arrive in the ERP as documents, not as phone calls or WhatsApp photos to be typed in.
No signal needed	The rep keeps selling; the upload waits for coverage.
Credit checked at the counter	Balance, limit and overdue invoices are on the phone before the order is taken.
Cash accounted for	Collections upload separately with cheque details, so the day's takings are visible in the office the moment the rep syncs.
Same rules as the office	Uploaded documents go through the same approval levels as anything keyed in the ERP.
Proven since 1998	AccSoft Solutions has supported Sri Lankan businesses for over 25 years, with more than 5,000 installations.

Who uses AccSoft SalesForce

- FMCG and food distributors with van sales and route reps
- Pharmaceutical distributors with medical reps taking orders
- Building materials and hardware suppliers with territory reps
- Beverage and bottled water distributors
- Any business whose reps take orders and collect payments at the customer

Frequently asked questions

Does the app need internet to take an order?

No. Orders, invoices, receipts, credit notes and collections are saved on the phone and uploaded when the rep taps Sync with coverage.

How does the office see what the rep did?

On sync, each document arrives in AccSoft ERP as a sales order, invoice, receipt, credit note or customer payment, ready for approval. The dashboard and Sales by Sales Rep reports update at the same time.

Can the rep see the customer's balance?

Yes. Outstanding balance, credit limit, ageing and overdue invoices are on the customer card, refreshed at every sync.

Are VAT and SSCL handled?

Yes. VAT and SSCL are calculated per line and on the total, and an Amount Inc VAT option handles customers quoted tax-inclusive prices.

How are collections and post-dated cheques handled?

Collections are taken against specific invoices with cash, cheque or post-dated cheque details, upload separately from sales, and post to Sales & Debtors and the Cash Book in the ERP.

Put your sales team on the phone

Book a free demo and we will load your items, prices and one rep's route onto a phone, take an order and a collection, and show it arrive in AccSoft ERP.

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