

MOBILE SALES APP EVALUATION CHECKLIST

Considerations when comparing Sage 100 Mobile Sales Solutions

The successful selection and roll-out of a mobile solution is a byproduct of a clear business vision married with the right technology and technology provider. Selecting the wrong product for your business can create morale problems for your sales team and worse. Choosing the right solution can result in better outcomes for everyone. But many products offer similar features, and it can be confusing to sort out what's important and what's not. *This tool can help you make a more informed decision.*

Use this checklist to compare Sage 100 mobile sales app vendors across these categories:

PRODUCTIVITY

What can the platform do to make you, your sales team, and your support staff more productive?

FUNCTIONALITY

What does the platform offer to perform & optimize mobiles sales, accounting, & business management?

TECHNOLOGY

How does the product leverage technology for usability, customization, and maintainability?

VALUE

How does the product package features and conveniences vs. cost for the usable lifetime of the product?

RISK

How does the product minimize risk and facilitate security (both network and financial security)?



xkzero offers comprehensive mobile sales and delivery systems purpose-built for ERP. Full featured mobile applications that work with or without Internet connection, and turn business processes into competitive advantages.

Sage 100 Mobile Sales App Solution Evaluation Checklist

Category	Feature	Benefit	Priority	iSales 100 by xkzero	Vendor #2	Vendor #3
CATEGORY > PRODUCTIVITY						
PRODUCTIVITY	Intuitive	Easy to learn and use.		√		
PRODUCTIVITY	Accessible	Anytime, anywhere access—from a customer, supplier, or at home—with or without an Internet connection.		√		
PRODUCTIVITY	Single Entry	Full integration with Sage 100 eliminates duplicate entries.		√		
PRODUCTIVITY	Automation	Automate business processes, and receive automated notifications.		√		
PRODUCTIVITY	Smart Mobile Workflows	Email, Phone, Map and Calendar integration from Customer and Contact records. Optionally add New Customers and Contacts on the fly.		√		
PRODUCTIVITY	Centralized Data	One version of the truth. Fully resolves to & managed in Sage 100—transactions, user rights, pricing rules, warehouses—everything.		√		
PRODUCTIVITY	Multi-language	Works in multiple languages.		√ (English, Spanish)		

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CATEGORY > FUNCTIONALITY						
FUNCTIONALITY	Transaction Types	<ul style="list-style-type: none"> - Quotes - Sales Orders - Invoices - Credit Memos - Hold transactions 		√		
FUNCTIONALITY	Multi Entity	Supports multi-companies and multi-warehouses in Sage 100		√		
FUNCTIONALITY	Customer Intelligence	<ul style="list-style-type: none"> - Customer inquiry - Open orders & invoices with detail - Customer memos - Last purchase history - National accounts - User Defined Field (UDF) support 		√		
FUNCTIONALITY	Inventory Intelligence	<ul style="list-style-type: none"> - Item inquiry, images, & price lookup - Quantities available by warehouse - Last purchase history - Charges and comments - Item memos - User Defined Field (UDF) support 		√		
FUNCTIONALITY	Personalization	Easily create the optimal mobile experience for each user. Individual permissions are set in a few clicks.		√		

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FUNCTIONALITY	Transaction Essentials	Flexibility to allow or deny user access to change details such as: Transaction Type, Memos, Salesperson, Warehouse, Ship-to, Terms Code, Electronic Signature Capture, Ship Via, Total Discount, Signature Capture, and Payment Application.		√		
FUNCTIONALITY	Transaction Details	Flexibility to allow or deny user access to change details such as: Add Regular Items, Misc. Items/Charges, Comments. Optionally explode Kit Items, Quick Entry Grid, Scan Barcode with Camera or Bluetooth, Select Sell-from Warehouse, View Warehouse/Item Availability, Line Level Price Override, Lot/Serial Allocation, Purchase Control Items, Unit of Measure Override. Support for Sage 100 Sales Tax including Avalara.		√		
FUNCTIONALITY	Transaction Payments	Select Available Payment Methods from Sage 100, including Credit Card Processing by Paya and APS. Require Full Payment, Allow Short or Over Payment. Force Re-calculation if Avalara Sales Tax is present.		√		

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FUNCTIONALITY	Inventory Management	Manage inventory, plan and manage movement of goods through distribution network, and control customer and transfer orders. Use multiple locations with lot and serial number tracking. Expired items are automatically removed from available inventory.		√		
FUNCTIONALITY	Warehousing and Fulfillment	Flexibility to allow or deny user access to change details such as: Control Sold From/Ordered From Warehouse.		√		
FUNCTIONALITY	Third-Party Support	Extends functionality through popular Sage 100 add-ons like Avalara Sales Tax, APS and Paya Credit Card Processing, DM2, Job Ops, most extended solutions.		√		
CATEGORY > TECHNOLOGY						
TECHNOLOGY	Easy app updates	Access newest versions of mobile sales app through the Apple App Store.*		√		
TECHNOLOGY	Communicates via standard web service (RESTful)	Secure, flexible integration with Sage 100 that does not rely on Visual Integrator.		√		

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TECHNOLOGY	Disconnected / Airplane Mode	Works regardless of Internet connection (customers can be served as all times).		√		
TECHNOLOGY	Process flexibility	Ability to modify and customize business logic to meet your company's unique requirements, as well as those of individual users.		√		
TECHNOLOGY	Direct to Sage 100	No external databases or portal interfaces to learn and maintain.		√		
TECHNOLOGY	Barcode Scanning	Speed up Transaction Entry with either camera or bluetooth scanning options.		√		
TECHNOLOGY	Print and email Receipts	Print invoices or order confirmations on-site (Apple Air Print or bluetooth). Email transaction receipts from app. Optionally let Sage 100 generate invoices with all the mobile details—including electronic signature image.		√		
TECHNOLOGY	Support for Sage 100 and Sage 100cloud	Support for Sage 100cloud, Sage 100, Standard, Premium, Advanced, versions 2016 and up.		√		

Category	Feature	Benefit	Priority	iSales 100 by xkzero	Vendor #2	Vendor #3
CATEGORY > VALUE						
VALUE	Flexible licensing options	Choose the functionality / feature set that works best for your business.		√		
VALUE	Low Total Cost of Ownership (TCO)	Monthly subscription with nominal installation fee. No contract required.		√		
VALUE	Scale as you grow	Unlimited remote users, unlimited Sage 100 companies, unlimited warehouses.		√		
VALUE	Mobile-focused User Interface (UI)	UI is designed for mobile devices, providing easy access to tasks with minimal 'clicks' and intuitive workflow.		√		
CATEGORY > RISK						
RISK	Free trial	Free, unlimited-time trial of app. Personalized demos on request.		√		
RISK	Predictable costs	Consistent monthly subscription. No contract minimums. No hidden fees.		√		
RISK	Quick deployment	Install the system in your preferred server environment and be functional the same day. No complicated, lengthy implementations.		√		

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RISK	Made by Sage 100 experts	Mobile sales app developed by Sage 100 experienced developers.		√		
RISK	Customer references	See how actual customers in your industry are succeeding with the app.		√		
RISK	Built on Sage 100 standards	Installs like any Sage 100 module. Follows all Sage 100 development standards, meaning no conflicts with other standards-based third party solutions.		√		
RISK	Painless upgrades	Upgrade the mobile app without fear of “breaking” Sage 100 or other third party add-ons.		√		

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