# Copying a Sales Document

Cavallo Support - 2024-11-22 - Sales

#### Overview

SalesPad allows users to create a new sales document from an existing open or historical sales document. Sales documents can be copied for the same customer or transferred to a different customer.

#### Security

To allow document copying in Modules > Security Editor, enable *Sales Document Entry* and set the following sub-settings to True for the document type(s) allowed to be copied:

- *Can Copy Invoice*
- *Can Copy Order*
- *Can Copy Quote*
- *Can Copy Return*

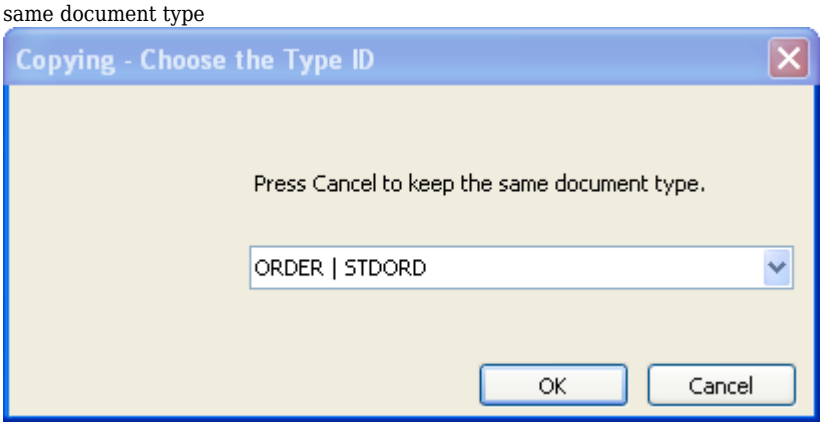
Save any changes.

**Note**: You must log out and back in for security changes to take effect.

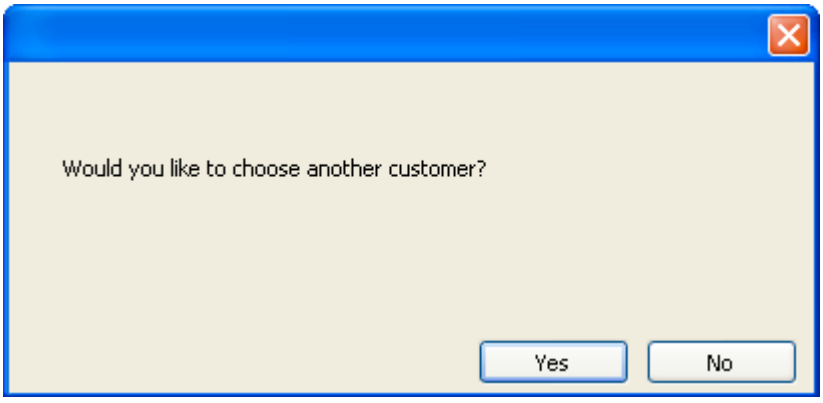
#### Usage

Follow these steps to copy a sales document:

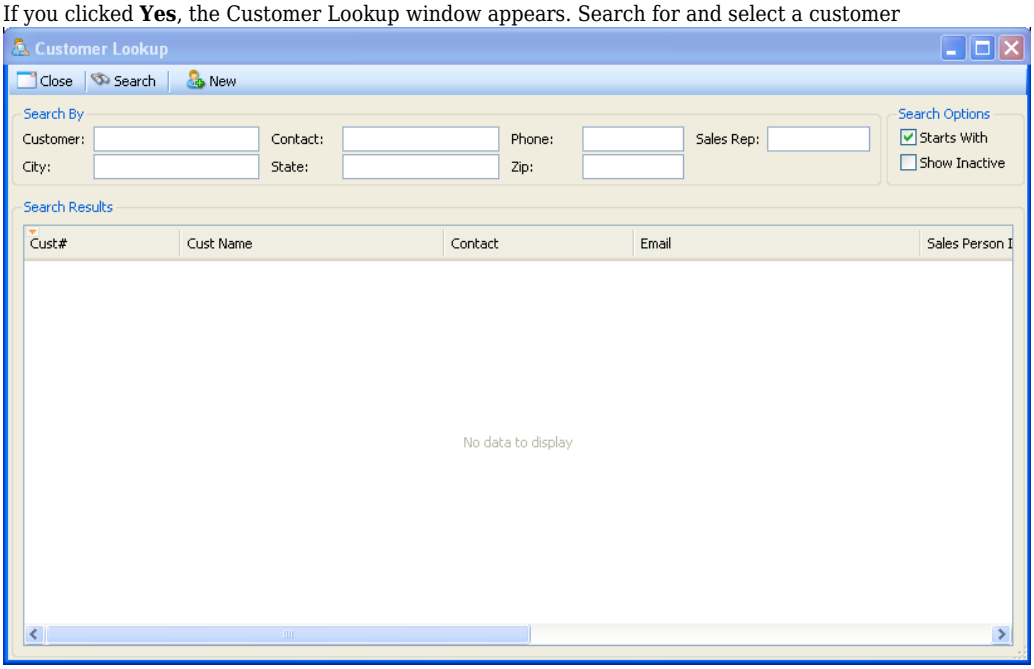
1. Open an existing Sales Document
2. Click **Copy** in the header
3. In the window that appears, select a document type to copy to and click **OK** or click **Cancel** to keep the same document type




4. Another window appears. If you are copying the document for a different customer, click **Yes**; if the copy will be for the same customer, click **No**



5. If you clicked **Yes**, the Customer Lookup window appears. Search for and select a customer




6. The new sales document is created and appears in a separate tab. Make any changes and click **Save**