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Copying a Sales Document

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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
- In the window that appears, select a document type to copy to and click OK or click Cancel to keep the same document type

Copying - Choose t	he Type ID	×			
	Press Cancel to keep the same document type.				
	ORDER STDORD	~			
	OK Cancel				

 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

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🙇 Custom										_ 🗆 🛛	
Close	🕸 Search	& New									
Customer: City:			Contact: State:			Phone: Zip:			Sales Rep:	Search Options	
Cearch Results											
Cust#		Cust Name			Contact			Email		Sales Person I	
No data to display											
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6. The new sales document is created and appears in a separate tab. Make any changes and click **Save**