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
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**