Creating and Opening Sales Documents

Cavallo Support - 2025-06-25 - Sales

Overview

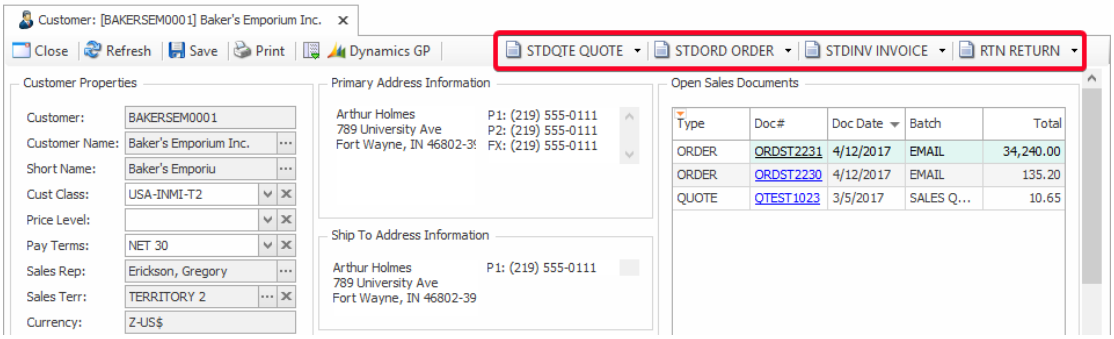
Sales documents can be created in SalesPad from the Customer card. After entry, sales documents can be sent to customers via email or print. A list of open sales documents for each customer can be found from on the Customer card, in the Open Sales Documents grid. For a broader search, the Sales Documents module can be used to search for all existing sales documents.

Proper security access for creating sales documents is required. Relevant securities are listed at the end of this document.

For creating sales documents using the Direct Sales Entry module, please refer to the Direct Sales Entry documentation.

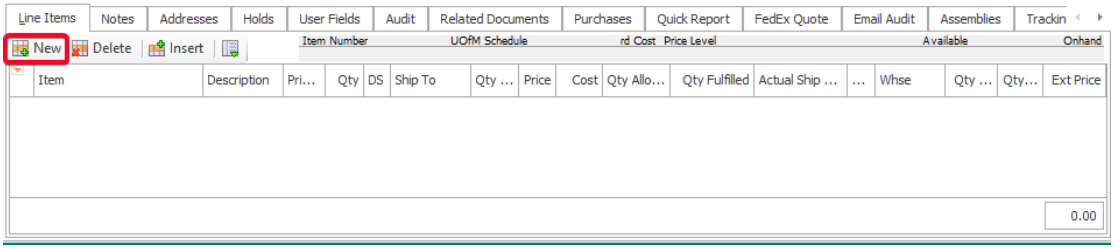
From the Customer Card

To create a sales document from the Customer card, click on the desired document type above the Open Sales Documents grid. Different document IDs can be chosen by clicking on the dropdown arrow to the immediate right of each document type.



Adding Line Items

To add a line item to a document, click on the **New** button on the Line Items tab. A new line will be added. Enter the item number make any needed changes.



After all desired line items have been added, saving the document will generate the document number. After a document has been saved, it can be emailed, printed, or forwarded through workflow.

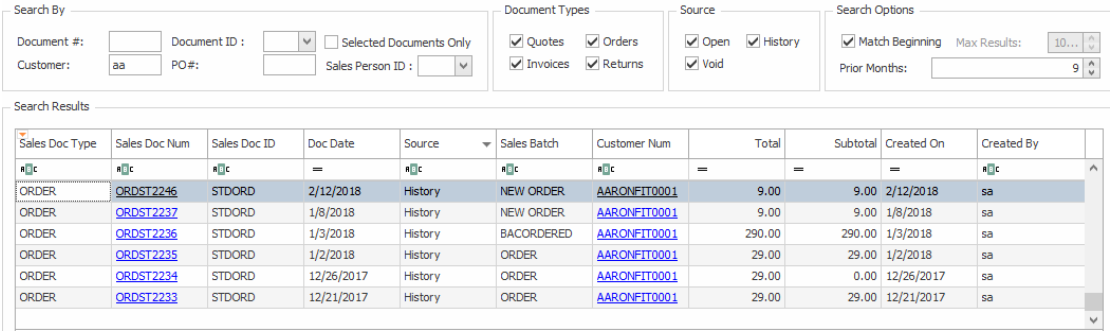
Sales Document Search

To search for an existing sales document:

1. Open the Sales Documents module.

2. Enter search criteria as desired.

3. Click on the **Search** button to filter based on the selected criteria.



Sales Doc Type	Sales Doc Num	Sales Doc ID	Doc Date	Source	Sales Batch	Customer Num	Total	Subtotal	Created On	Created By
ORDER	ORDST2246	STDORD	2/12/2018	History	NEW ORDER	AARONFIT0001	9.00	9.00	2/12/2018	sa
ORDER	ORDST2237	STDORD	1/8/2018	History	NEW ORDER	AARONFIT0001	9.00	9.00	1/8/2018	sa
ORDER	ORDST2236	STDORD	1/3/2018	History	BACORDERED	AARONFIT0001	290.00	290.00	1/3/2018	sa
ORDER	ORDST2235	STDORD	1/2/2018	History	ORDER	AARONFIT0001	29.00	29.00	1/2/2018	sa
ORDER	ORDST2234	STDORD	12/26/2017	History	ORDER	AARONFIT0001	29.00	0.00	12/26/2017	sa
ORDER	ORDST2233	STDORD	12/21/2017	History	ORDER	AARONFIT0001	29.00	29.00	12/21/2017	sa

4. Click on a sales document number to open the sales document. Clicking on the Customer Num field will open the Customer Card.

Security

Customer Card - Grants access to the customer card, from which sales documents are created.

Customer Overview - Displays the list of open sales documents for the customer. Document number links can be selected to open a document.

Sales Documents - Find sales documents and access to their detailed information via individual Sales Document Cards.

Sales Document Entry - Allows the creation of new sales documents.

Sales Document Line Items - Provides access to the Line Items tab on a sales document. This must be enabled to add line items to a document.

Sales Document Properties - Gives access to the sales document header properties.