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Creating and Opening Sales Documents

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Overview

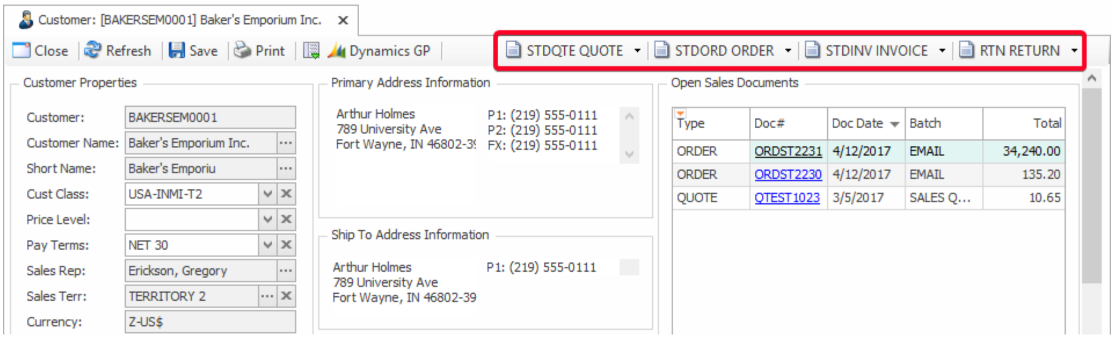
Sales documents can be created in SalesPad from the Customer card. After entry, sales documents can be sent to customers via email or print. A list of open sales documents for each customer can be found from on the Customer card, in the Open Sales Documents grid. For a broader search, the Sales Documents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

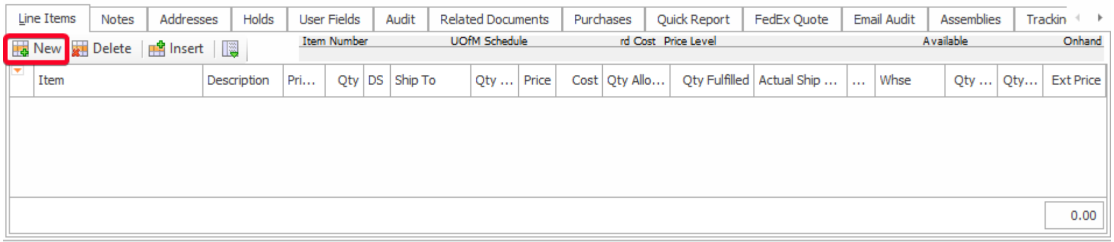
From the Customer Card

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.

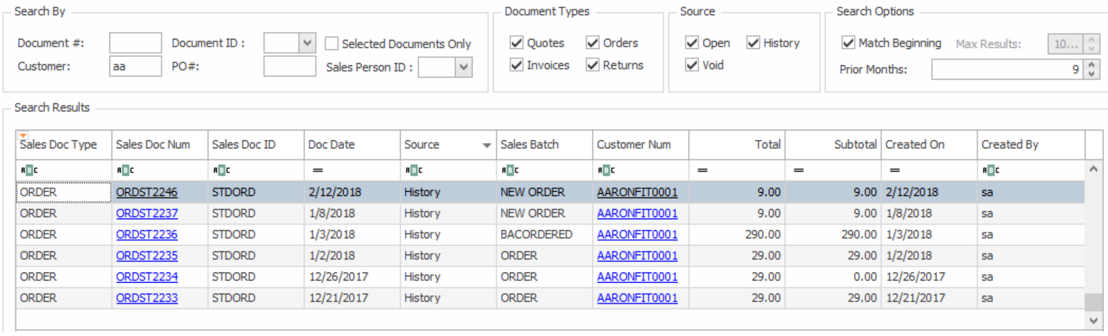
Sales Document Search

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.



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.