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Creating and Opening Sales Documents

Megan De Freitas - 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.

The screenshot shows the Customer Card for Baker's Emporium Inc. (BAKERSEM0001). The top navigation bar includes buttons for Close, Refresh, Save, Print, and Dynamics GP. A red box highlights the document type dropdown menu, which includes STDQTE QUOTE, STDORD ORDER, STDINV INVOICE, and RTN RETURN. The Open Sales Documents grid lists the following documents:

Type	Doc#	Doc Date	Batch	Total
ORDER	ORDST2231	4/12/2017	EMAIL	34,240.00
ORDER	ORDST2230	4/12/2017	EMAIL	135.20
QUOTE	QTEST1023	3/5/2017	SALES Q...	10.65

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.

The screenshot shows the Line Items tab with the 'New' button highlighted by a red box. The Line Items grid is empty, with columns for Item, Description, Pri..., Qty, DS, Ship To, Qty ..., Price, Cost, Qty Allo..., Qty Fulfilled, Actual Ship ..., Whse, Qty ..., Qty..., and Ext Price. The total value at the bottom right is 0.00.

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.

Search By

Document #:
Document ID :
☐ Selected Documents Only

Customer:
PO #:
Sales Person ID :

Document Types

☒ Quotes
☒ Orders
☒ Invoices
☒ Returns

Source

☒ Open
☒ History
☒ Void

Search Options

☒ Match Beginning
Max Results:
Prior Months:

Search Results

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.