



Document Release

Megan De Freitas - 2025-06-11 - Sales

Overview

The Document Release plugin allows splitting sales documents, adding freight, and adding payments in one process.

Usage

To use Document Release:

1. Open a sales document that is ready to release
2. The first step in Document Release is selecting the shipping options. The method denoted with a green arrow is default. Double-click a Shipping Method to select it (green check mark denotes selected). Freight and total will then be calculated in the Document Totals section
3. Add any comments in the Paperwork Comment section and click **Next** to continue to the Payments step:

Releasing ORDST0019109: (Step 2 of 3) Total: \$20.15

Payments

Payments for ORDER ORDST0019109 (AssureBuy) Doc Total: 20.15 Remaining Amount: 0.00

Credit Card: 20.15 Cash/Check: 0.00 Gift Certificate: 0.00

Payment T...	Trans ...	Card Name	Card Number	Exp. Date	Amount Paid	Auth ...	Trans...
Credit Card P...	PREAUTH	MasterCard	XXXX-XXXX-XXXX-5...	03/2013	20.15	V19A2E3...	10/07/20...

Result: 10/7/2010 11:31:02 AM, Amount: 20.15, Auth Code: V19A2E31843A, AuthDate: 10/7/2010 12:00:00 AM, CVV:

Credit Card Information

Processor: Payflow Pro

Card Number: XXXX-XXXX-XXXX-5100

Card Name: MasterCard

Expiration Date: 03/2013

Security Code:

Amount: 20.15 Date: 10/7/2010

Transaction Type: ☒ Authorization ☐ Charge ☐ Manual

Type: ☒ Payment ☐ Deposit

Billing Address

Cardholder Name: Roberta Masouras

Address 1: P.O. Box 1391

Address 2:

Address 3:

City: Indianapolis

State: IN Zip: 46206-1391

Country: USA Country Code: US

Address Code: BILLING

< Back Next > Cancel

4. Enter payment information (Refer to the SalesPad Payments documents [Credit Card Processing, Cash and Check Payments, or Gift Certificates] for more detailed instructions) and click **Next** to continue to the Splitting step:

A document where splitting does not apply:

Releasing ORDST0019109: (Step 3 of 3) Total: \$20.15

Split Options

☒ Backorder Quantities

☒ Non-Inventory As Backordered Items

☒ Warehouse

☒ Shipping Method

☒ Drop Ship Items

☒ Shipping Address

☐ Fulfilled Qty

Do Not Split

Split Line Items

Item Number	Quantity	Qty Backor...	Qty Fulfilled	Warehouse	Shipping Method	NI	DS
Sales Doc Num: ORDST0019109.1							
ACCS-CRD-2...	1	0	1	WAREHOUSE	GROUND	<input type="checkbox"/>	<input type="checkbox"/>

Nothing To Split

< Back Finish Cancel

A document that will be split:

Releasing ORDST0019114: (Step 3 of 3) Total: \$247.75

Split Options

☒ Backorder Quantities

☐ Non-Inventory As Backordered Items

☐ Warehouse

☐ Shipping Method

☐ Drop Ship Items

☒ Shipping Address

☐ Fulfilled Qty

Do Not Split

Split Line Items

Item Number	Quantity	Qty Backor...	Qty Fulfilled	Warehouse	Shipping Method	NI	DS
Sales Doc Num: ORDST0019114.1							
CORDG	1	0	1	WAREHOUSE	INTERNATIONAL	<input type="checkbox"/>	<input type="checkbox"/>
HA100G	1	0	1	WAREHOUSE	INTERNATIONAL	<input type="checkbox"/>	<input type="checkbox"/>
Sales Doc Num: ORDST0019114.2							
COV100G	1	1	0	WAREHOUSE	INTERNATIONAL	<input type="checkbox"/>	<input type="checkbox"/>
100XLG	1	1	0	WAREHOUSE	INTERNATIONAL	<input type="checkbox"/>	<input type="checkbox"/>

< Back Finish Cancel

If the document should be split (refer to the SalesPad [Splitting Sales Documents](#) documentation for more information), select the Split Options and click **Finish**.

If the document was split, the original document will close and you can open each split as a separate document (Order number followed by a decimal number). If no split occurs, the document will remain open with the shipping and payment information added. The document can now be released to the next queue.

Workflow

The Document Release plugin can also be set up as part of workflow. Adding the plugin to a workflow queue will cause the Document Release dialog to pop up automatically when the document reaches the set point in workflow. Refer to the [SalesPad Workflow](#) documentation for more information.

Security

Document Release - Allows users to use the Document Release plugin