



## Document Release

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### 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

New Payment	Payment T...	Trans ...	Card Name	Card Number	Exp. Date	Amount Paid	Auth ...	Trans...
Remove Payment	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

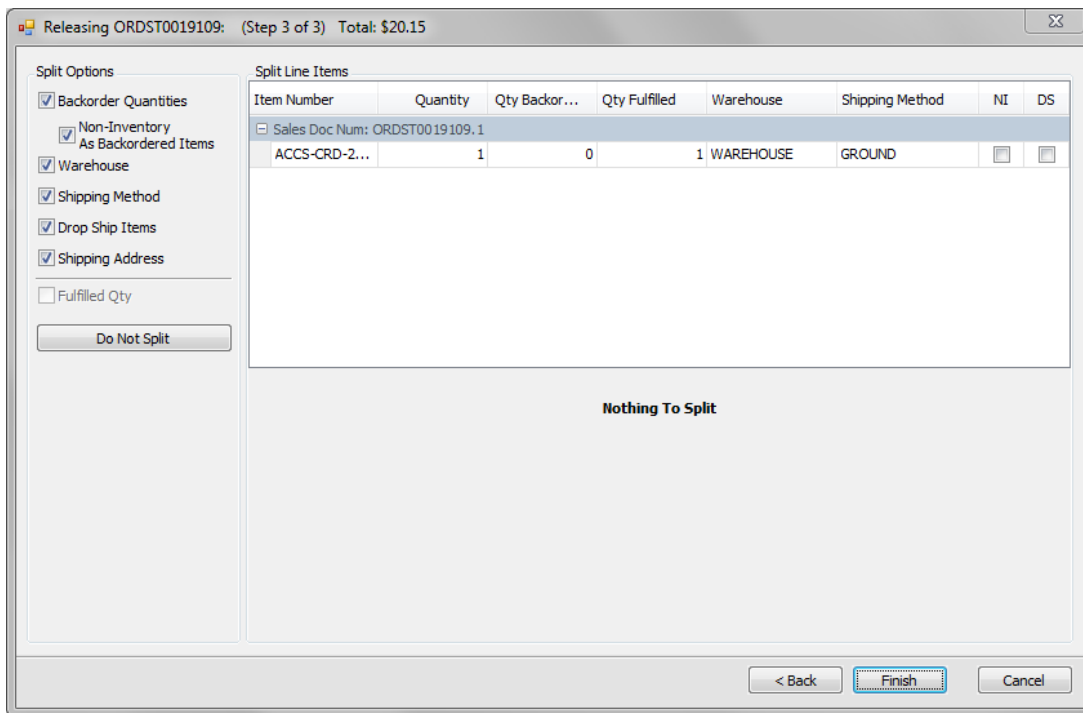
Billing Address

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

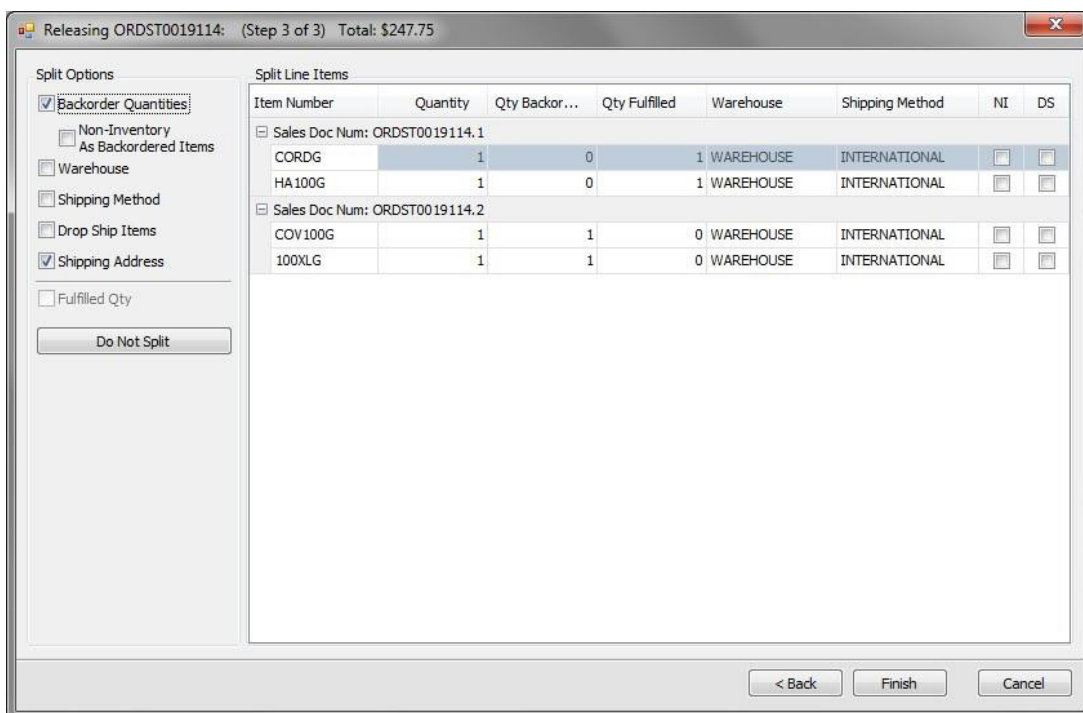
< Back Next > Cancel

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:



A document that will be split:



If the document should be split (refer to the SalesPad [Splitting a Sales Document](#) 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