Excel Sales Document

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Overview

Using the Sales Pad Excel Sales Document report, along with an Excel spreadsheet containing merge fields, you can create an Excel spreadsheet report for an existing sales document. Merge fields will insert predefined information from the sales document into the spreadsheet report. You can create more than one Excel spreadsheet with different levels of detail, and select from those files to choose the level of detail displayed on the printed sales document. Any relevant settings and securities will be noted at the end of the document.

Setup

First, create an Excel file template, much like you would create a template for a Printed Report. This

template can include the company logo and standard wording that will apply to all printed documents using this template. It must contain merge fields that will pull information specific to each sales

document onto the report. Place the desired merge fields from the list below into the appropriate areas of the template. Here is a list of merge fields that can be used:

Excel Value		Sales Document Value
	=	Sales_ Doc_ num
	=	Sales_ Doc_ num
	=	Current Date
	=	Document Date
	=	Customer Name
	=	Contact Person
	=	Ship To Phone 1
	=	Customer Number
	=	Document Date
	=	Sales Person Id

= Shipping Method ID

= Payment Terms

= Customer PO Number

= Comment

= Notes

= Customer Ship To Contact Person

= Customer Ship To Contact Person

= Document Date

= Customer Card Email Address

= Sales Document Bill To Address

= Sales Document Ship To Address

= Sales Document Subtotal

= Sales Document Freight

= Sales Document Tax

= Sales Document Total

= Contact

= Document Shipping Email Address

= Phone

= Bill To

= Ship To

Line Items:

= Quantity Ordered

= Quantity Shipped

= Item Number

= Item Description

= Unit Price

= Sell Price

= Extended Price

= Extended Price

= Serial Number

Usage

To print the report, open a sales document and click the **Print** button. Select Excel Sales Document from the list of available reports, then click **Print** or **Preview**. You will be prompted to open the Excel spreadsheet.

Note: Sales Pad will open any xls file and will merge with only the first worksheet in the file.

Select the file and click **Open**. Any merge fields will be replaced with the corresponding information from the open sales document. You can now modify the spreadsheet and print, fax, or email it as needed.

Note: Due to limitations in Microsoft, the maximum character transfer for any field is 255.

Security

Excel Sales Document – Allows users to see and use the Excel Sales Document report

*Print Report** – Allows users to see and print the reports

Note: Securities with an asterisk (such as *Print Report*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.