Quick Save

Cavallo Support - 2024-11-22 - Sales

Overview

Some properties of sales documents do not require that the entire document be saved to the database when they are changed. To facilitate a smoother experience, sales documents may be “quick saved.” Quick saving writes only changed parts of a document to the database, when it is possible to do so.

Note: The Sales Document PreSave script runs when Quick Save is enabled.

Sales Document Quick Save

When this setting is set to False, the full sales document will be saved to the database whenever it is saved. When this setting is set to True, some modifications to the document can be saved with a faster save. Quick saving is possible if modifications to a sales document are limited to the following fields:

- Document Date
- Required Ship Date
- Item Description
- Notes
- Comments
- User Defined Fields (unless they are listed in the *Quick SD Save Sales Line UDF Override* or *Quick SD Save UDF Override* settings)

A pre-save script can convert a quick save to a full save if it modifies the appropriate fields.

Quick SD Save UDF Override

Changes to any sales document UDFs listed in this setting will prevent a quick save from taking place. Instead, the full sales document will be saved to the database. In the screenshot above, changes to xBuild, xRevision and xTotalTransport will require a full save. If a UDF named xApplyMark were changed, a quick save could still be performed.

Quick SD Save Sales Line UDF Override

Changes to any line item UDFs listed in this setting will prevent a quick save from taking place. Instead, the full sales document will be saved to the database. In the screenshot above, changes to xVendor and xVendorItem will require a full save. If a UDF named xPackageIndividually were changed, a quick save could still be performed.

Settings

Sales Document Quick Save – Enables the quick save feature; defaults to False.

Quick SD Save UDF Override – Sales document user defined fields that force a full save; defaults to empty.

Quick SD Save Sales Line UDF Override – Line item user defined fields that force a full save; defaults to empty.