Recurring Sales

Cavallo Support - 2024-12-03 - Sales

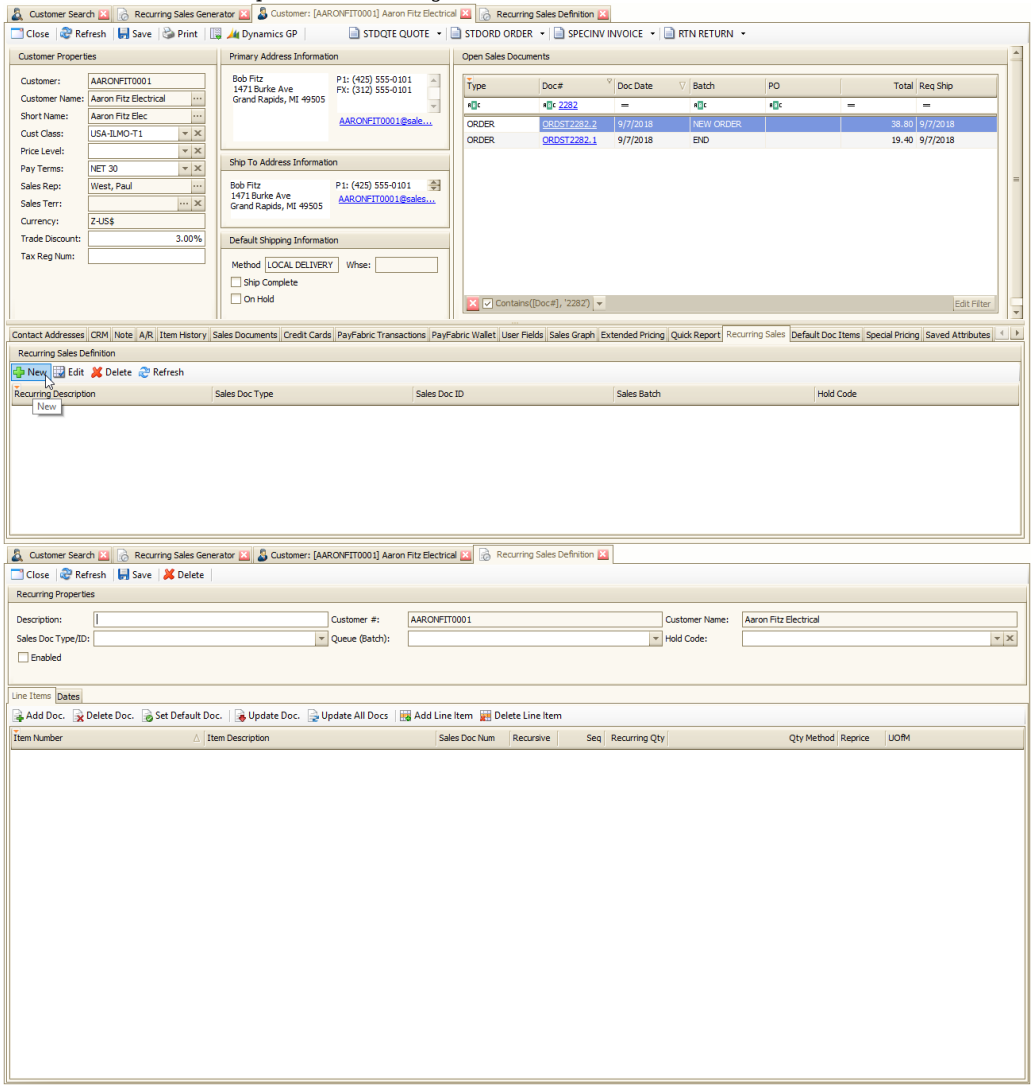
Overview

SalesPad Recurring Sales allows users to create templates for sales documents. These templates, called Document Definitions, may then be used to automatically generate actual sales documents. Recurring sales allows users to create an unlimited number of Document Definitions per customer. Document Definitions can be based on previously created sales documents and are viewed on the Recurring Sales tab in the Customer Card in SalesPad. SalesPad Recurring Sales is useful for service contracts, etc.

Creating Recurring Sales

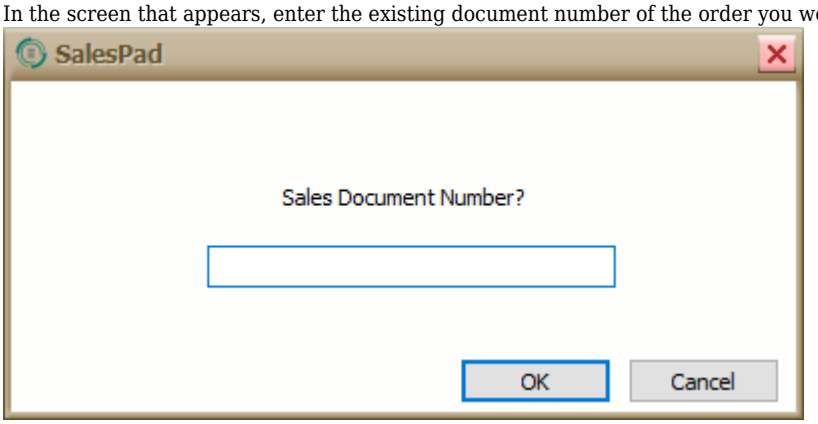
To create recurring sales for a customer from an existing sales document:

1. On the Customer Card, click the Recurring Sales tab and go to step 2. Or, from the sales document, select Sales Document Recurring Sales from the **Actions** dropdown ( ) on the sales document header and go to step 5
2. Click the **New** button to open the "Recurring Sales Definition" screen.

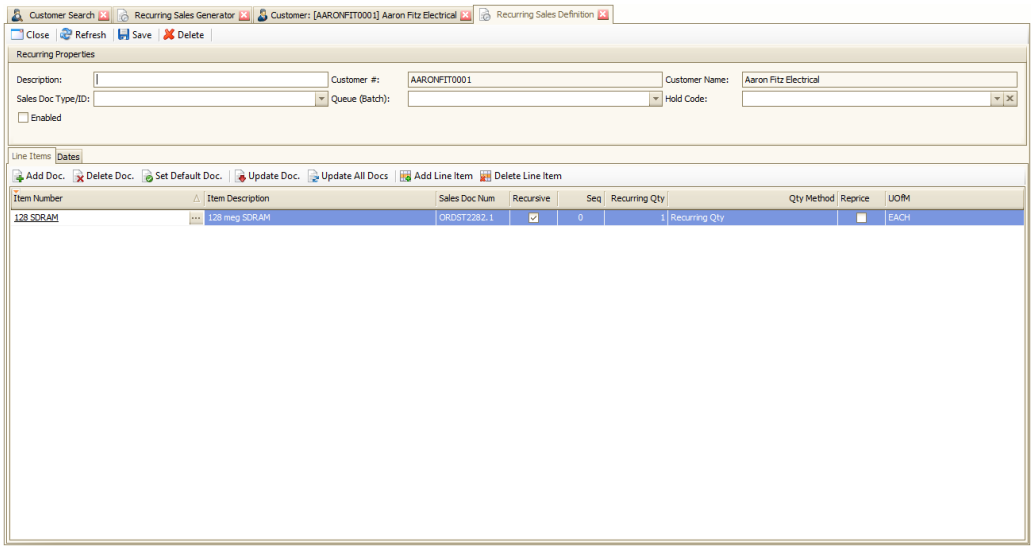


3. Click **Add Document** from the Recurring Sales Lines Tab

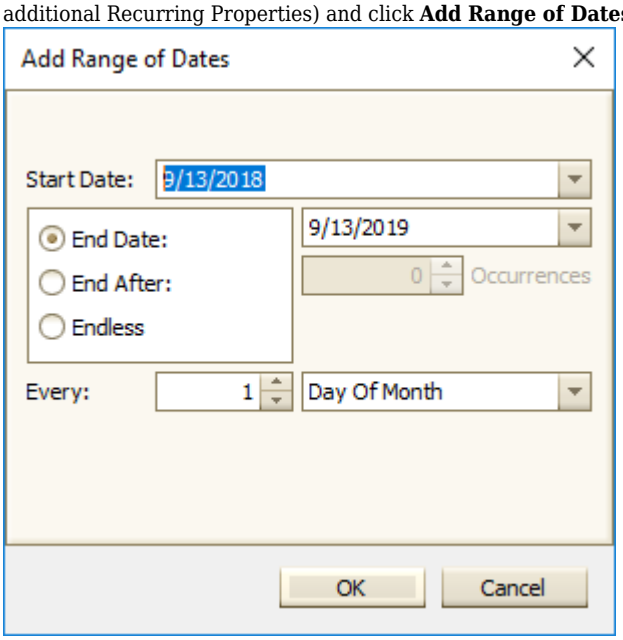
4. In the screen that appears, enter the existing document number of the order you would like to repeat



5. All sales line items from the entered sales document will appear in the Recurring Sales Line grid. You can change the Recurring Quantity or uncheck line items you do not want to include in recurring sales, or continue to add additional documents to the recurring sales lines. If a document is updated with additional line items, click **Update From Sales Doc** to add the new lines to the Recurring Sales Lines tab



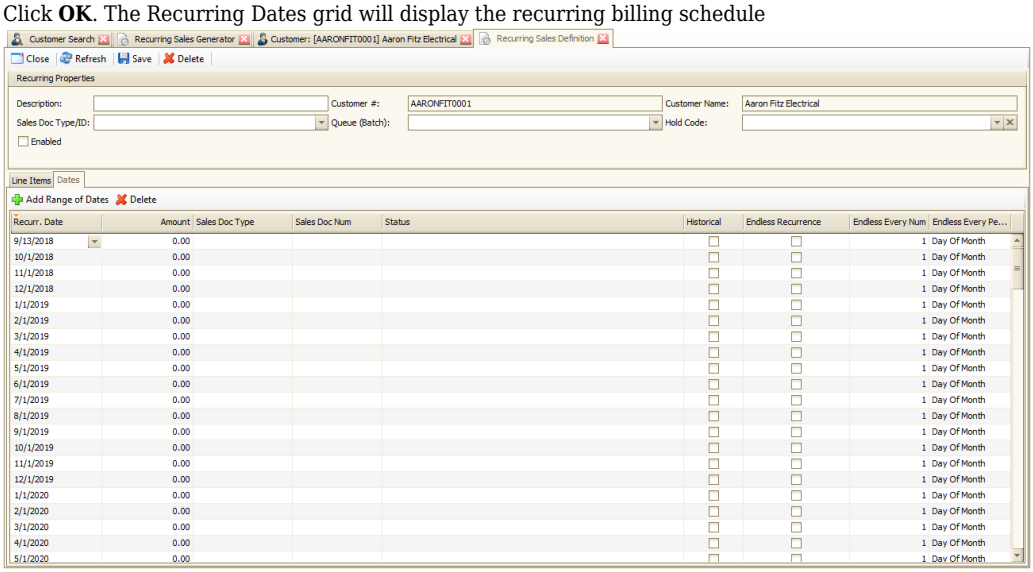
6. To add recurring dates, click the Dates Tab (you may first need to select a batch and fill out the additional Recurring Properties) and click **Add Range of Dates**. A new window will appear



7. Enter a Start Date
8. Select **End Date** and enter a date for recurrences to end, or select **End After** and enter the number of occurrences
9. Choose the frequency of recurrence (Example: Every 3 Day of Month will recur on the third of every

month; Every 3 Day will recur every three days)

10. Click **OK**. The Recurring Dates grid will display the recurring billing schedule

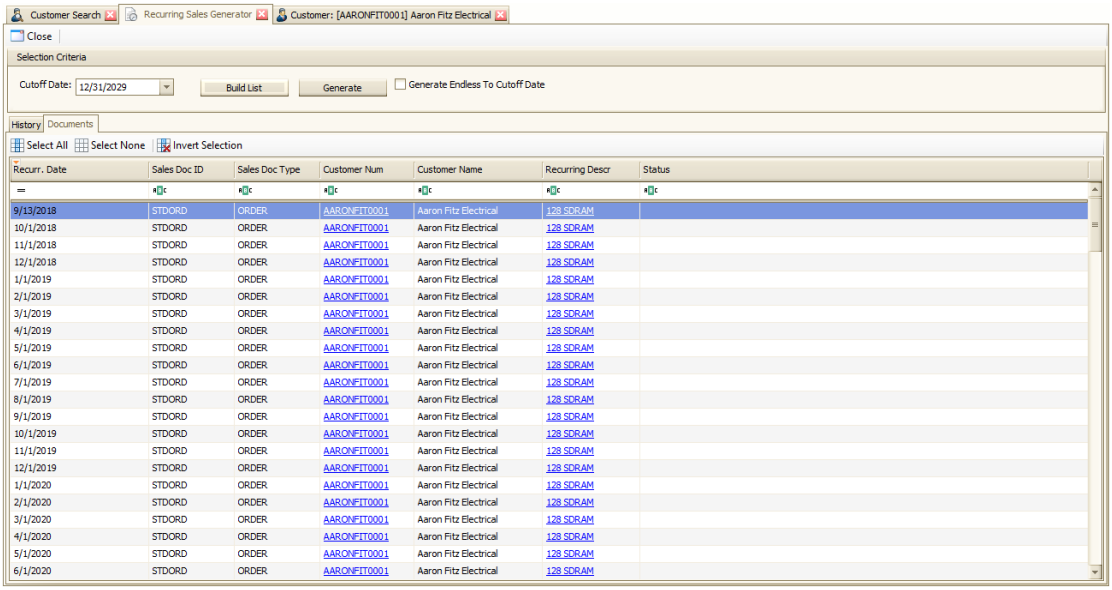


11. Fill out the Recurring Properties at the top of the screen, including document description (required), document type (quote, order, invoice), original workflow queue, and automatic process holds.
12. Be sure to click the **Enable** checkbox, which will allow the data to show up in the Recurring Sales Generator screen.
13. Click **Save**. The sale is ready to repeat as scheduled. You can click **Set Default Doc** on the Recurring Sales Lines tab to set the selected document as default for Recurring Sales (this will be denoted with an * next to the sales document number)
14. Return to the customer card and click **Refresh**. The new recurring sale will display on the Recurring Sales Tab, and you can click on the description (or double-click within another field) to return to and edit the Recurring Sales Definition

Repeat these steps to create recurring sales for additional documents or customers.

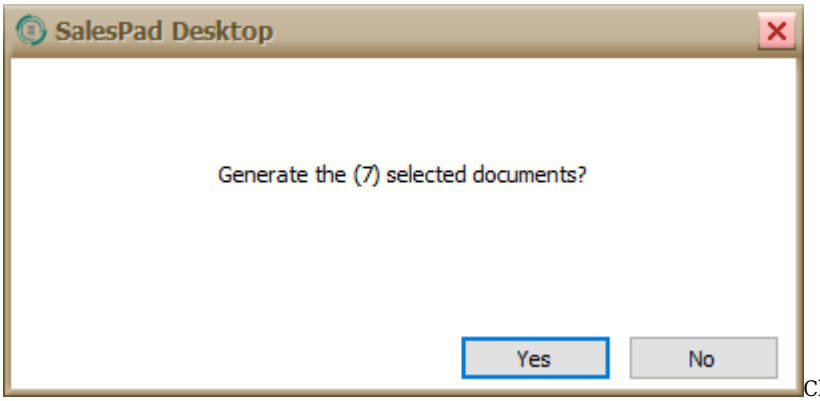
The Recurring Sales Generator (Modules > Recurring Sales) compiles a list of all scheduled recurring sales for every customer card. After the list is compiled, documents can be selected and released to the appropriate SalesPad workflow queue (batch) for further processing, where they can be changed individually as needed (for example, to add line items).

To view a list, select a Cutoff Date and click **Build List**. A list meeting the cutoff date criteria will compile:



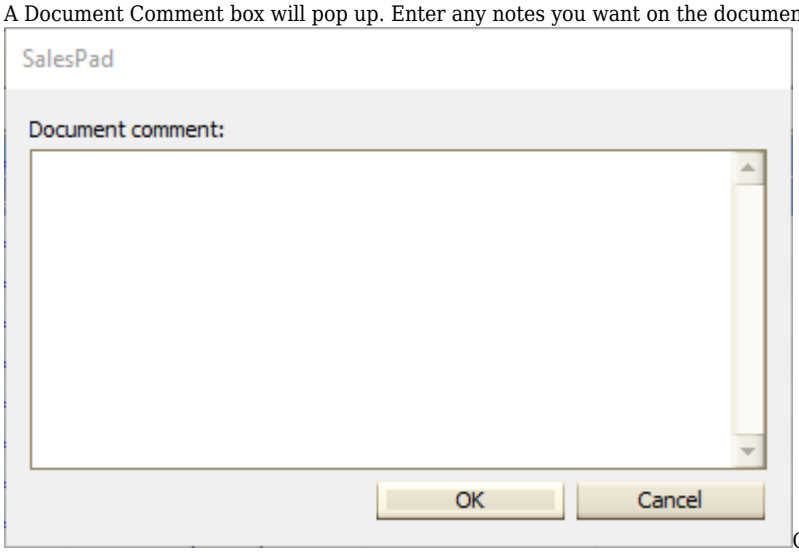
To release documents,

1. Select documents from the list to generate and click **Generate**. A confirmation message will appear.



Click **Yes**.

2. A Document Comment box will pop up. Enter any notes you want on the document here.



Click **OK**.

3. The selected document(s) will be generated. The status column on the Recurring Sales Generator screen will show the orders generated and other status messages. The document comment, if any, will display on the Notes tab of all selected documents.

Security

Customer Recurring Sales - Allows a security group to see any Recurring Sales Definitions for a customer and create or edit them.

Recurring Sales Definition - Allows a security group to open the window for the Recurring Sales Definition.

Sales Document Recurring Definition - Allows users to create Recurring Sales Definitions from the Sales Document Action, Sales Document Recurring Definition.

Recurring Sales Generator History - Allows users to see Documents generated from the Recurring Sales Generator.

*Recurring Sales Generator Documents** - Allows users to see a built list of Documents and Select documents to generate in Recurring Sales Generator.

Note: You must log out of SalesPad and then back in for security changes to take effect.