



Recurring Sales


Megan De Freitas - 2024-12-03 - Sales

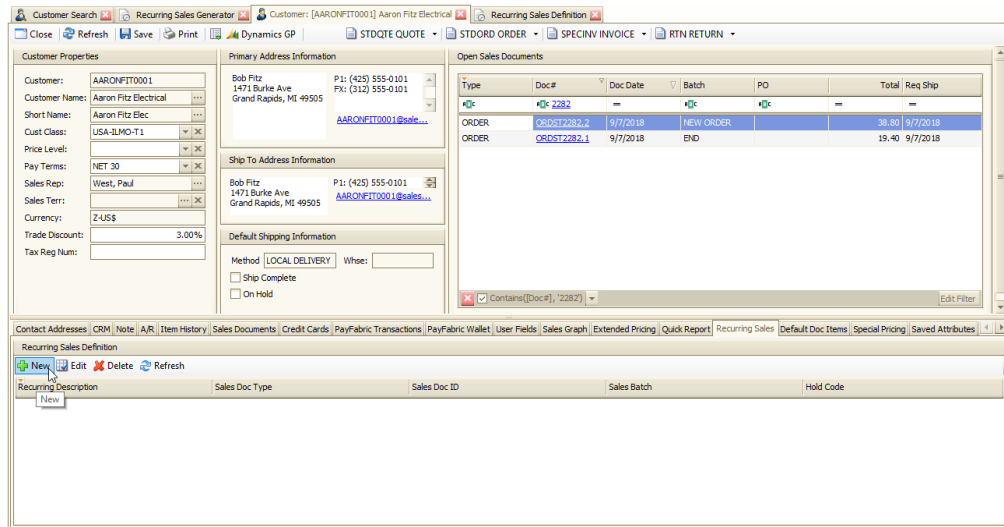
Overview

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.



The screenshot shows the SalesPad Recurring Sales Definition screen. The top section contains customer information for Aaron Fitz Electrical (AARONFIT0001), including contact details and address. The middle section shows a table of open sales documents, with columns for Type, Doc#, Doc Date, Batch, PO, Total, and Req Ship. The bottom section is the Recurring Sales Definition form, which includes a 'New' button and a table for defining recurring sales with columns for Recurring Description, Sales Doc Type, Sales Doc ID, Sales Batch, and Hold Code.

Type	Doc#	Doc Date	Batch	PO	Total	Req Ship
ORDER	QSDGT2282.2	9/7/2018	NEW ORDER		38.80	9/7/2018
ORDER	QSDGT2282.1	9/7/2018	END		19.40	9/7/2018

Recurring Description	Sales Doc Type	Sales Doc ID	Sales Batch	Hold Code

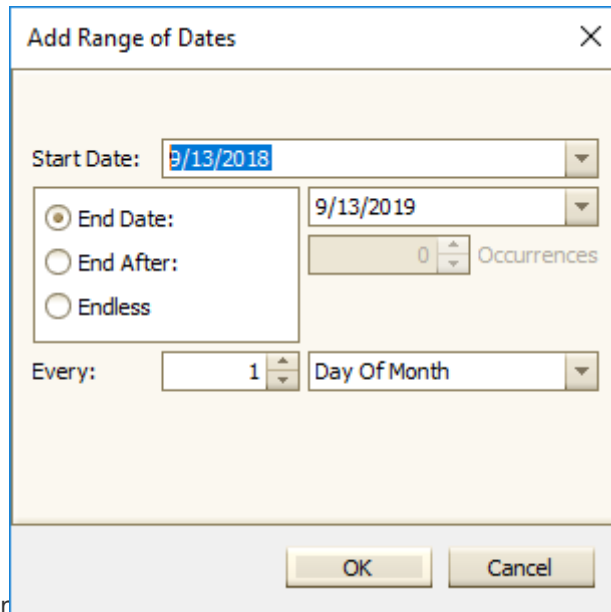
3. Click **Add Document** from the Recurring Sales Lines Tab
4. In the screen that appears, enter the existing document number of the order you would like to repeat

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

Item Number	Item Description	Sales Doc Num	Recursive	Seq	Recurring Qty	Qty Method	Reprice	UOM
128	128 meg SDRAM	ORDST2282.1	<input checked="" type="checkbox"/>	6	1	Recurring Qty	<input type="checkbox"/>	EACH

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

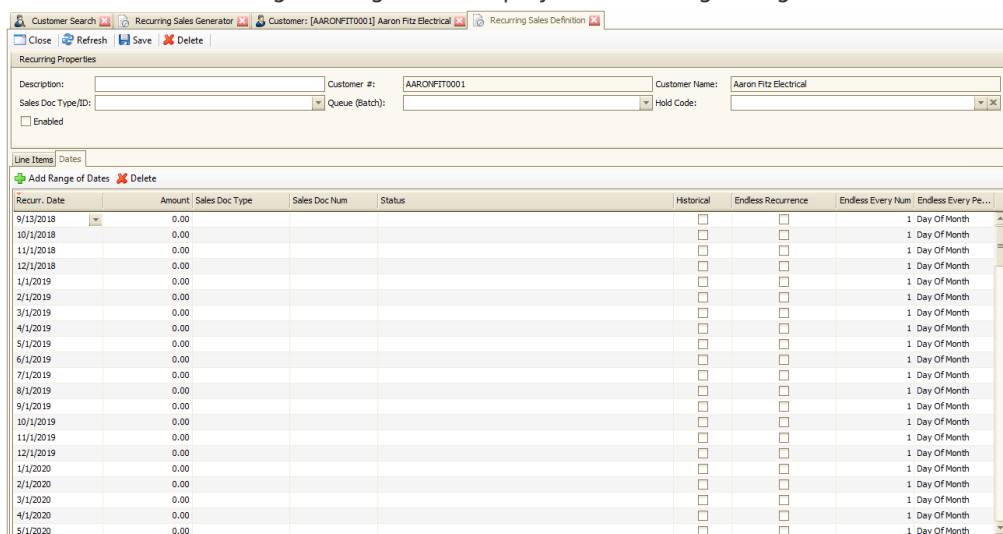


The 'Add Range of Dates' dialog box contains the following fields and options:

- Start Date:** A date picker set to 9/13/2018.
- End Date:** A radio button option, currently selected, with a date picker set to 9/13/2019.
- End After:** A radio button option with a numeric input field set to 0 and the label 'Occurrences'.
- Endless:** A radio button option.
- Every:** A numeric input field set to 1, followed by a dropdown menu set to 'Day Of Month'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

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



The 'Recurring Sales Generator' screen displays the following information:

- Recurring Properties:**
 - Description: [Empty]
 - Customer #: AARONFIT0001
 - Customer Name: Aaron Fitz Electrical
 - Sales Doc Type/ID: [Empty]
 - Queue (Batch): [Empty]
 - Hold Code: [Empty]
 - Enabled: ☐
- Line Items / Dates:**
 - Buttons: Add Range of Dates, Delete
 - Table with columns: Recurr. Date, Amount, Sales Doc Type, Sales Doc Num, Status, Historical, Endless Recurrence, Endless Every Num, Endless Every Pe...
 - Table data (first 10 rows):

Recurr. Date	Amount	Sales Doc Type	Sales Doc Num	Status	Historical	Endless Recurrence	Endless Every Num	Endless Every Pe...
9/13/2018	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
10/13/2018	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
11/13/2018	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
12/13/2018	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
1/13/2019	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
2/13/2019	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
3/13/2019	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
4/13/2019	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
5/13/2019	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month
6/13/2019	0.00				<input type="checkbox"/>	<input type="checkbox"/>		1 Day Of Month

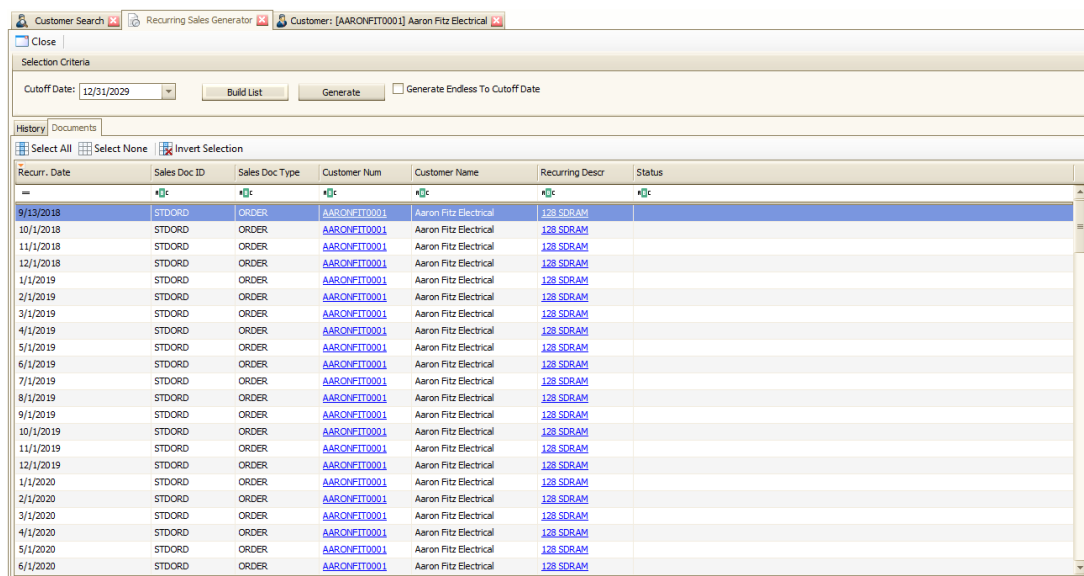
11. Fill out the Recurring Properties at the top of the screen, including document description (required), document type (quote, order, invoice), original workflow queue, and automatic process holds.
12. Be sure to click the **Enable** checkbox, which will allow the data to show up in the Recurring Sales 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:

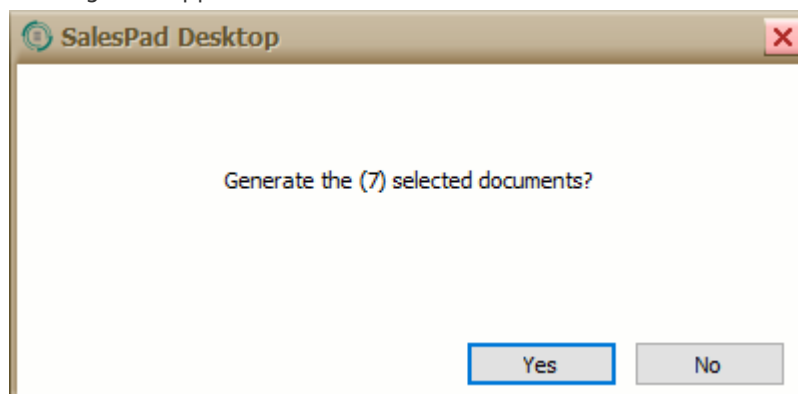


The screenshot shows the 'Recurring Sales Generator' window. At the top, there are tabs for 'Customer Search', 'Recurring Sales Generator', and 'Customers: [AARONFIT0001] Aaron Fitz Electrical'. Below the tabs is a 'Selection Criteria' section with a 'Cutoff Date' dropdown set to '12/31/2029', a 'Build List' button, a 'Generate' button, and a checkbox for 'Generate Endless To Cutoff Date'. Below this is a 'History' tab and a 'Documents' tab. The 'Documents' tab is active, showing a table with columns: 'Recurr. Date', 'Sales Doc ID', 'Sales Doc Type', 'Customer Num', 'Customer Name', 'Recurring Descr', and 'Status'. The table contains 24 rows of data, all for the customer 'Aaron Fitz Electrical' and recurring description '128 SDRAM'. The 'Recurr. Date' column shows dates from 9/13/2018 to 6/1/2020. The 'Sales Doc ID' and 'Sales Doc Type' columns show 'STDORD' and 'ORDER' respectively. The 'Status' column is empty for all rows.

Recurr. Date	Sales Doc ID	Sales Doc Type	Customer Num	Customer Name	Recurring Descr	Status
9/13/2018	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
10/1/2018	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
11/1/2018	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
12/1/2018	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
1/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
2/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
3/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
4/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
5/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
6/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
7/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
8/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
9/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
10/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
11/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
12/1/2019	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
1/1/2020	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
2/1/2020	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
3/1/2020	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
4/1/2020	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
5/1/2020	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	
6/1/2020	STDORD	ORDER	AARONFIT0001	Aaron Fitz Electrical	128 SDRAM	

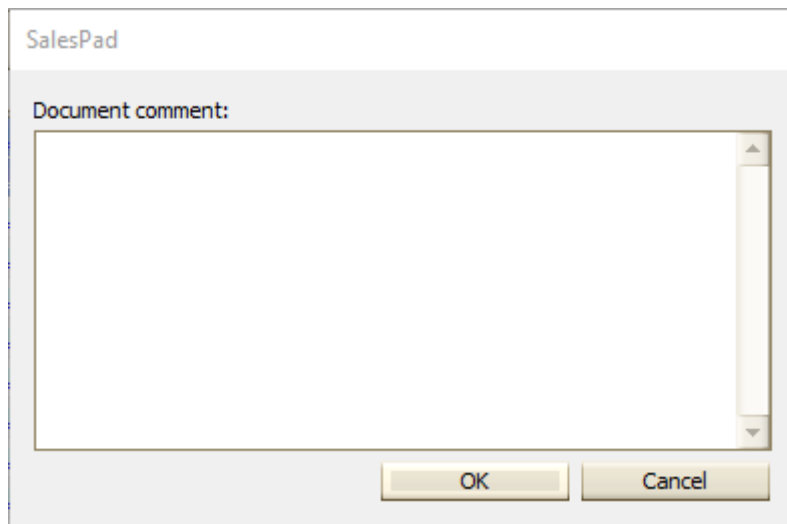
To release documents,

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.