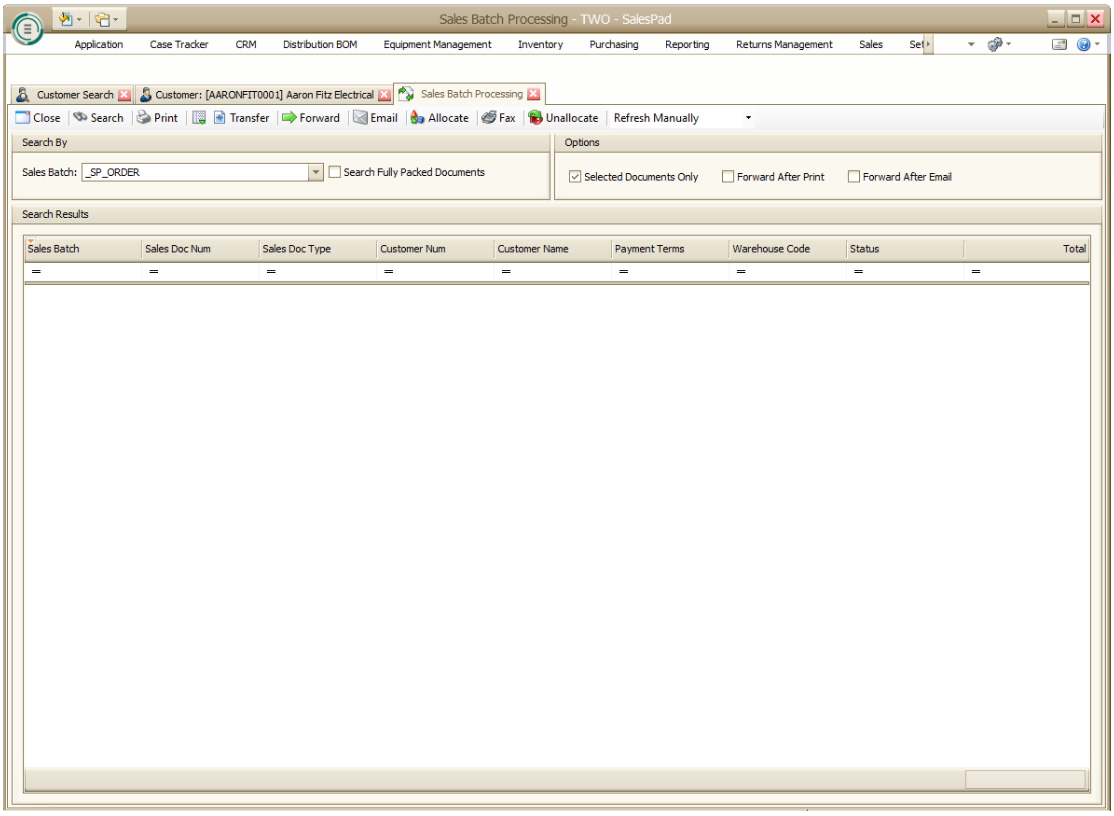
Sales Batch Processing

Cavallo Support - 2025-06-25 - Sales

Overview

Sales Batch Processing provides an interface to perform batch-level operations on multiple documents. From this module, users can forward documents in workflow, place payments on orders, and print, fax, or email documents and invoices. Sales Batch Processing is accessible in SalesPad from Modules > Sales Batch Processing.

Sales Batch Processing Screen:



Check Boxes

Three check boxes appear in the Sales Batch Processing module:

Selected Documents Only: If checked, actions will affect only selected documents; if unchecked, actions will affect all documents in the Search Results grid.

Forward After Print: If checked, forwards the document(s) to the workflow-defined next queue after printing.

Forward After Email: If checked, forwards the document(s) to the next workflow-defined queue after emailing.

Header Buttons

The following buttons appear in the header of the Sales Batch Processing module:

Close

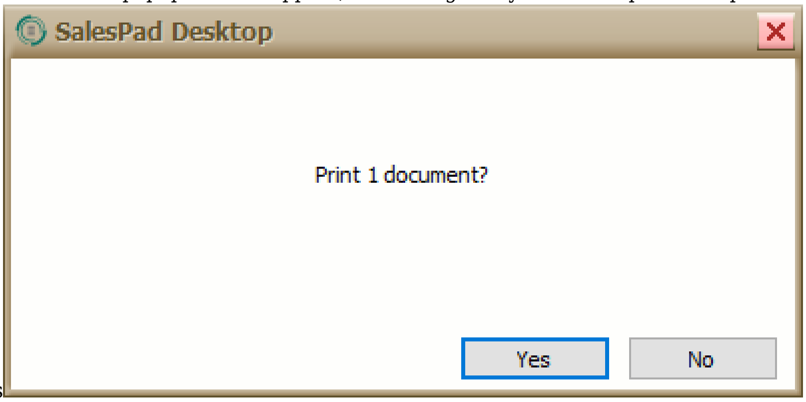
Clicking this button will close the Sales Batch Processing module.

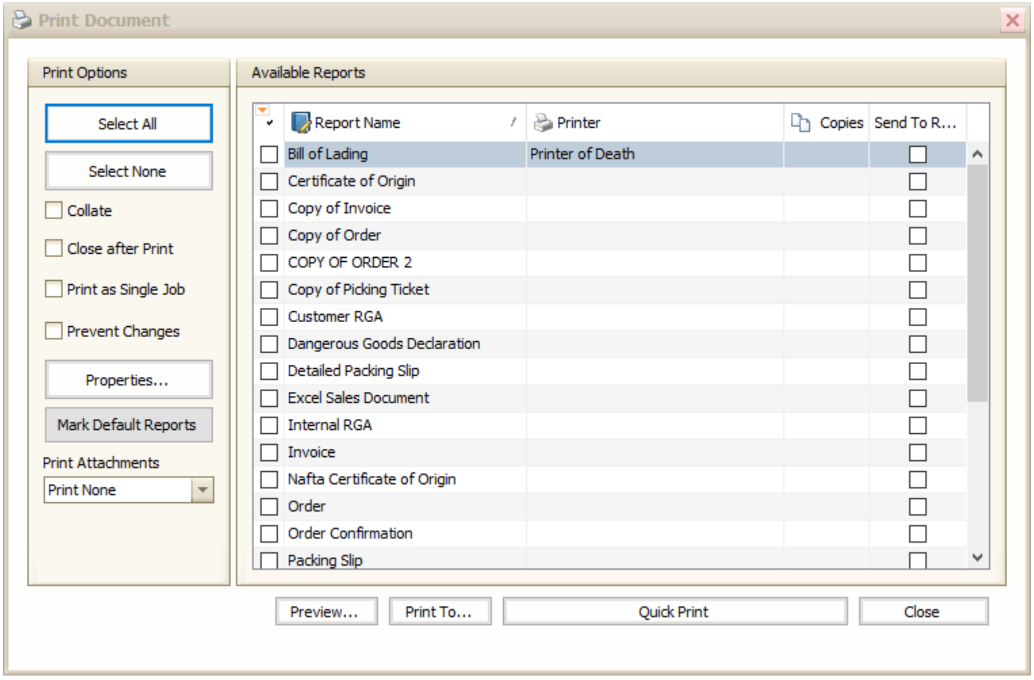
Search

Clicking this button will search for all open documents in all batches, or search by any criteria typed into the Search By Sales Batch field. Results appear in the Search Results grid.

Print

Clicking this button will start the process of printing selected documents (or all documents in the Search Results grid, if the Selected Documents Only box is left unchecked).

1. In Sales Batch Processing, search for and select the document(s) you wish to print
2. Click the **Print** button. A popup box will appear, confirming that you want to print the specified number of documents


3. Click **Yes**. The Print Sales Document Report box will appear, where print options and available reports can be selected


4. Select the appropriate report(s) to print
5. Select an option (Preview, Print To, Quick Print) from the buttons at the bottom. Preview/Options will appear upon selection

Note: Because this module has the ability to print multiple documents from one screen, security specified by document in the Print Reports section will be ignored.

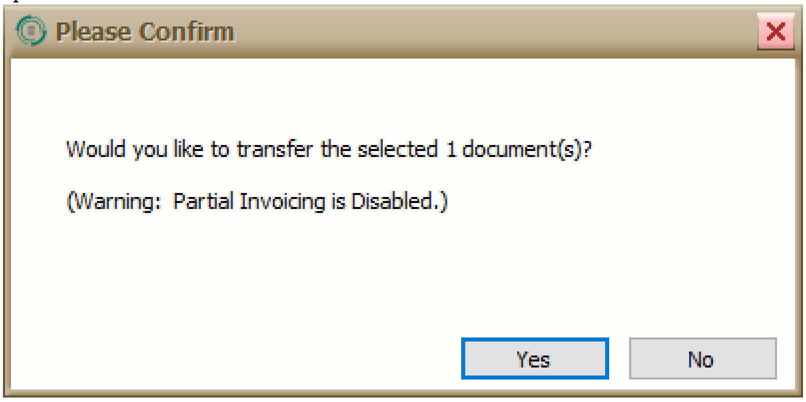
Transfer to Invoice

Clicking this button will start the process of transferring selected documents (or all documents in the Search Results grid, if the Selected Documents Only box is left unchecked), to Invoice.

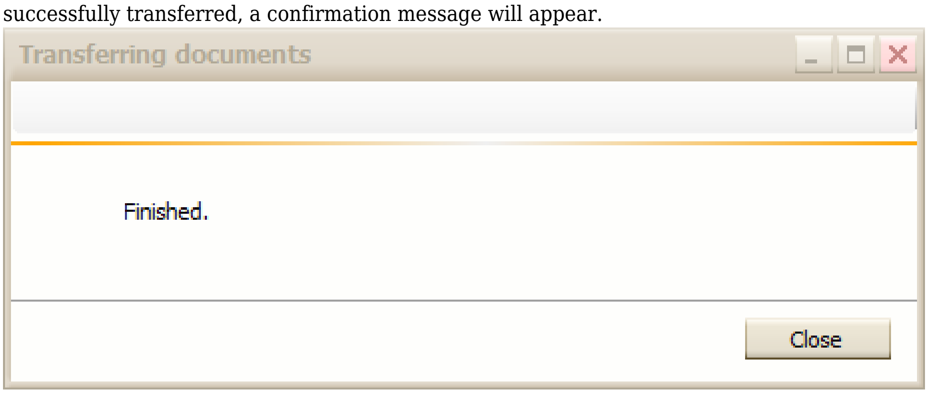
Note: When you transfer a document to an invoice in Sales Batch Processing, the workflow will skip the first step automatically, allowing it to auto run a rule.

Procedure

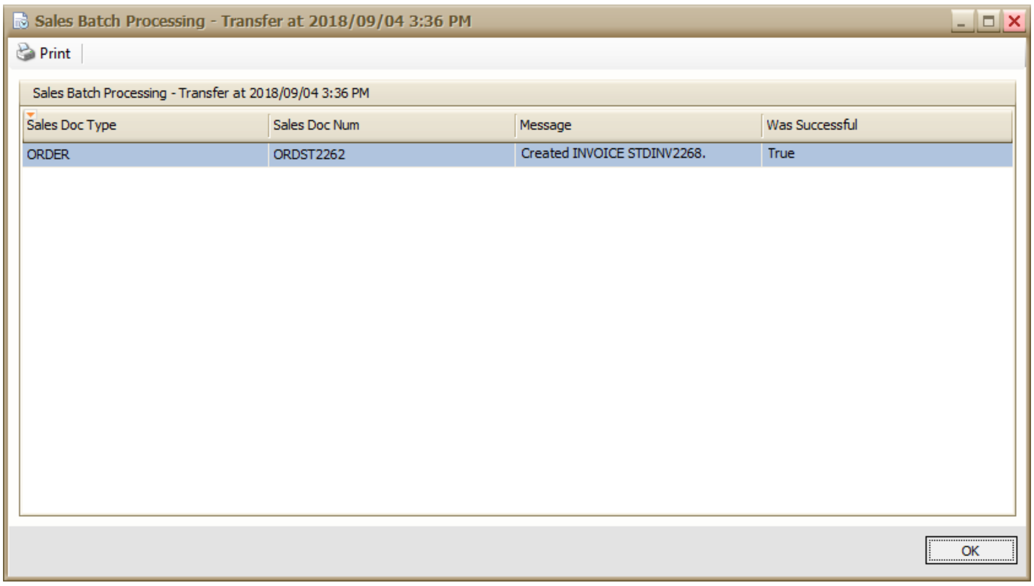
1. Search for and select the document(s) you wish to transfer
2. Click the **Transfer to Invoice** button. A popup box will appear, confirming that you want to transfer the specified number of documents to invoice



3. Click **Yes**. The "Transferring Orders to Invoices" window appears, until all selected documents have been transferred. This may take some time.
   If a document cannot be transferred, a screen with an explanatory message will appear after confirming the transfer (ex: unfulfilled items). This screen can be printed or closed. When documents have been successfully transferred, a confirmation message will appear.



4. Click **Close**. The Sales Batch Processing - Transfer to Invoice window will appear, listing any documents that were transferred



From here you can either print the confirmation or close the window.

Forward

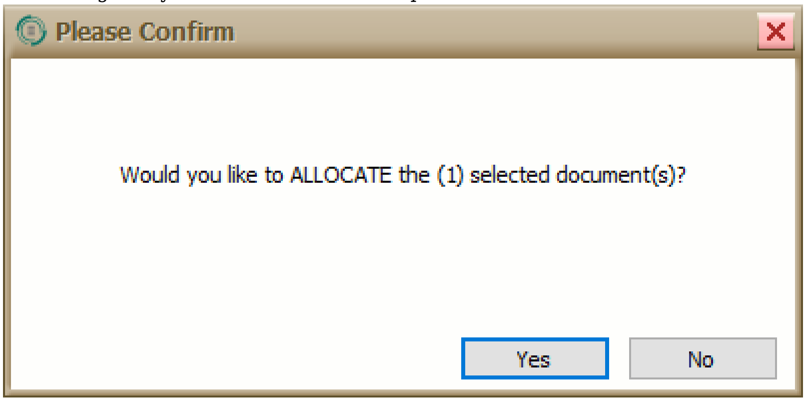
Clicking this button will move selected documents (or all documents in the Search Results grid, if the Selected Documents Only box is left unchecked) to the next workflow-defined Queue. A confirmation log will appear, which can either be printed or closed.

Allocate

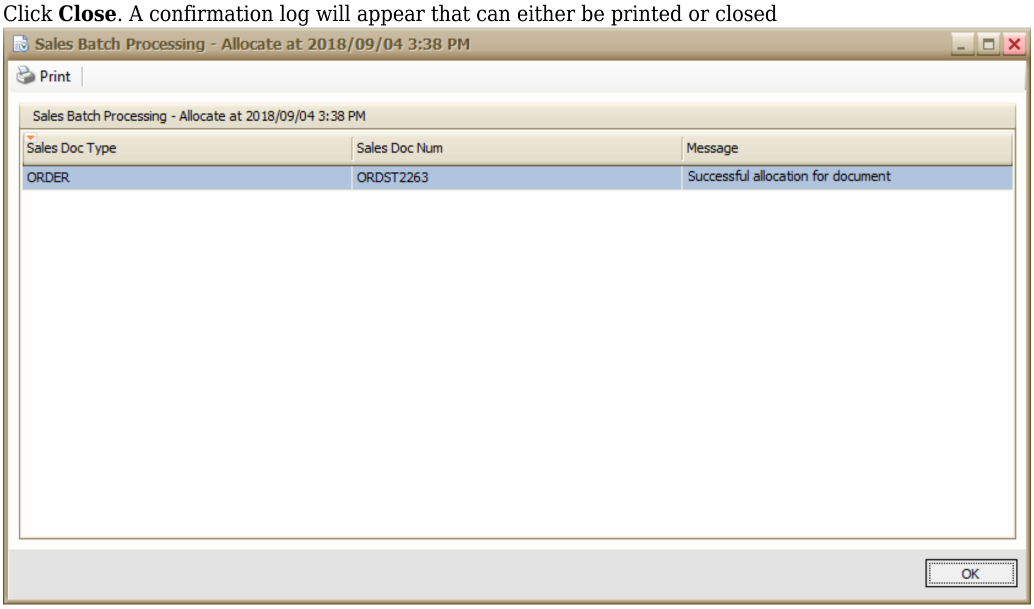
Clicking this button will allocate lines on selected documents (or all documents in the Search Results grid, if the Selected Documents Only box is left unchecked).

Procedure

1. Search for and select the document(s) you wish to allocate the lines for. A popup box will appear, confirming that you want to allocate the specified number of documents

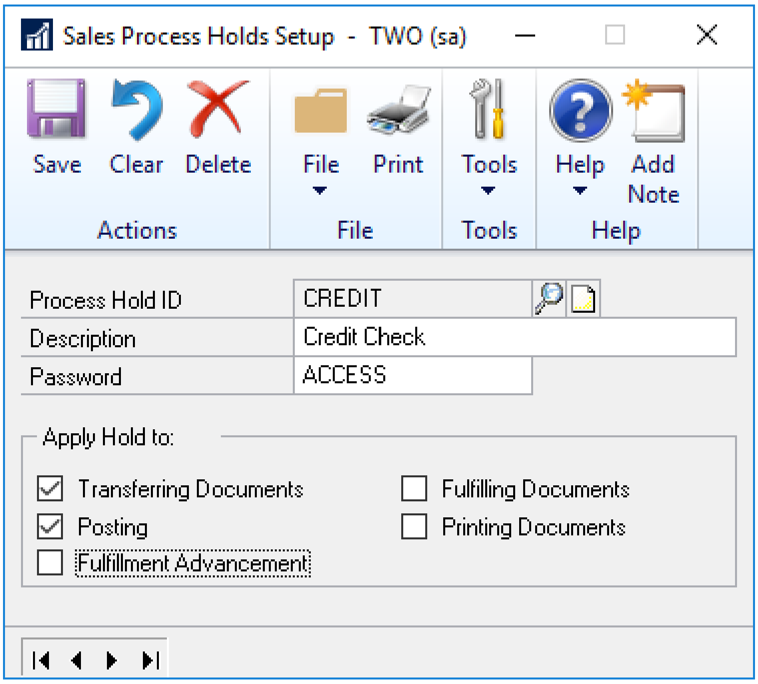


2. Click **Yes**. The Allocating Sales Documents screen appears, until all selected documents have been allocated. This may take some time.
3. When documents have been successfully allocated, a confirmation message will appear.
4. Click **Close**. A confirmation log will appear that can either be printed or closed



Note: To stop a document with a credit card pre-auth from being transferred or posted before payment is received, you must change the hold settings in Dynamics GP:

1. Log in to Dynamics GP
2. Open the Microsoft Dynamics GP dropdown Menu, and then go to Tools > Setup > Sales > Process Holds
3. On the Sales Process Holds Setup window, select the Process Hold ID to change
4. Select Transferring Documents and Posting to apply those holds
5. Click **Save**



Email

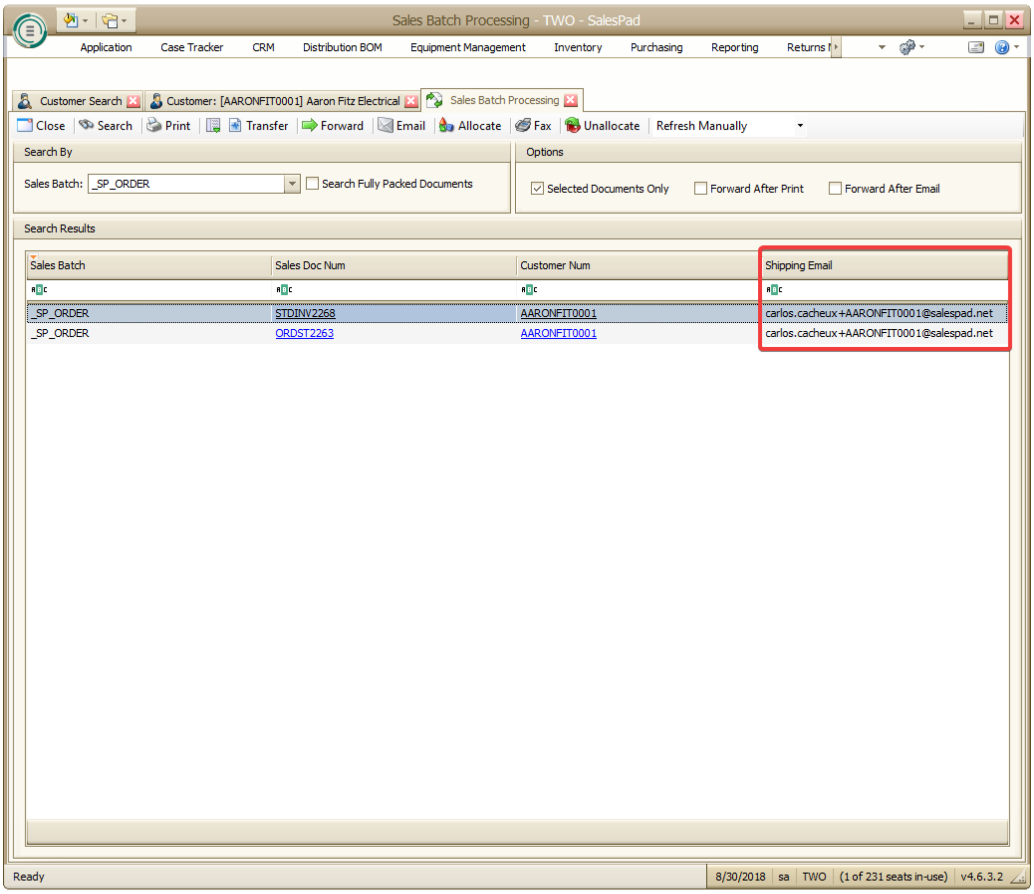
Clicking the Email button will start the process of emailing selected documents (or all documents in the Search Results grid, if the Selected Documents Only box is left unchecked). Note: You must have valid Email Server setup to use this function. [Emailing and Email Templates]

Note: The From email address used must match the global address pointed to by the company email server set up in the Sales Email Confirmation settings in SalesPad's Settings module. (Refer to the [Emailing in SalesPad Desktop]).

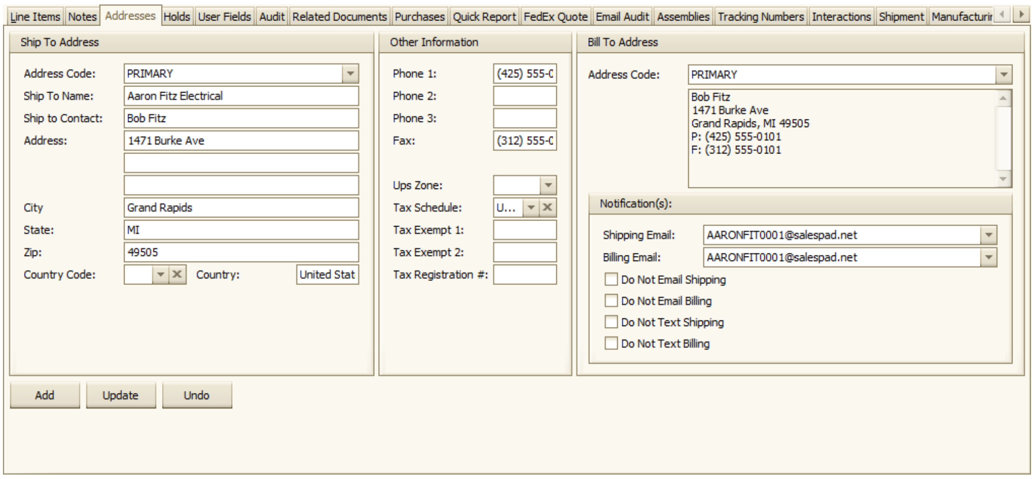
Note: Before you click the Email button, make sure that the email address field you plan to use is populated. If the customer's "Dont Email" box is checked (viewable from Customer Search), an email will not actually be sent.

Procedure

1. Make sure the shipping email and/or billing email are already populated, as in the screen below (If you do not see the proper email columns populated in the Sales Batch Processing screen, it will not email properly.)

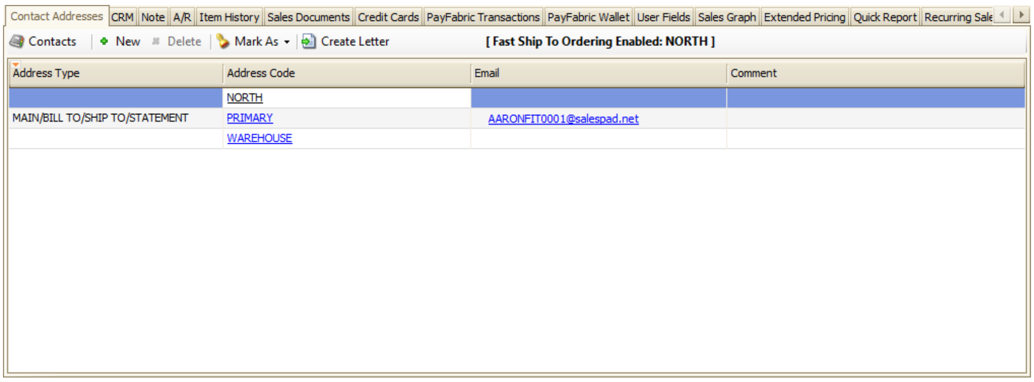


2. If they are, proceed to step 5. If they are not, you can update them from each sales document, on the Addresses tab:



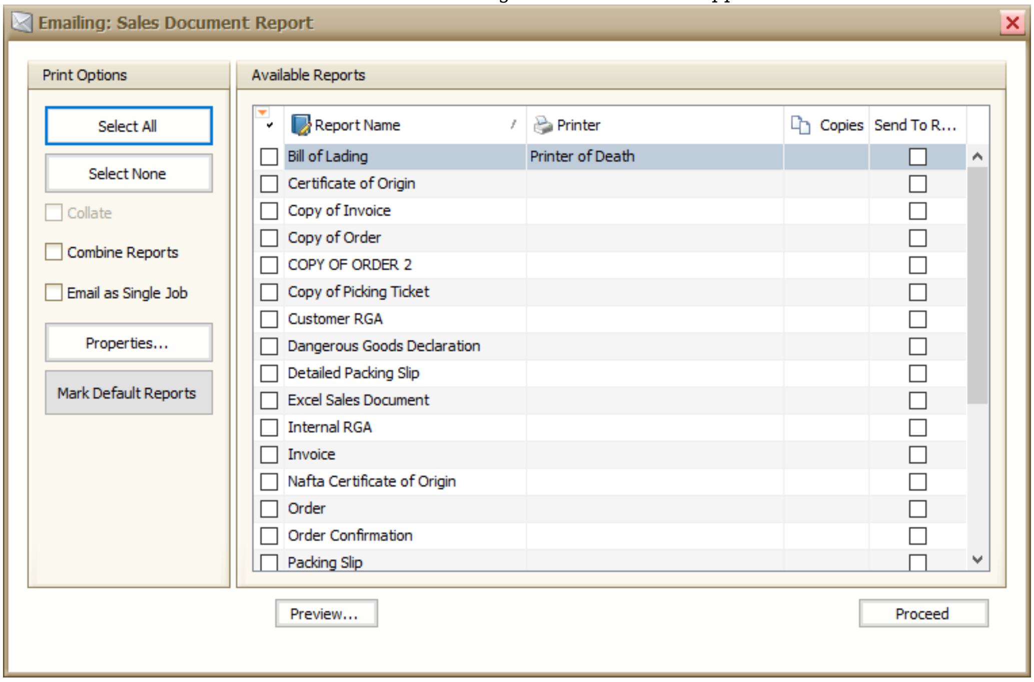
3. After updating, save and close the document
4. Refresh the information in Sales Batch Processing

   Note: To automatically populate these values for new sales documents, you can fill them out on the Customer Card:

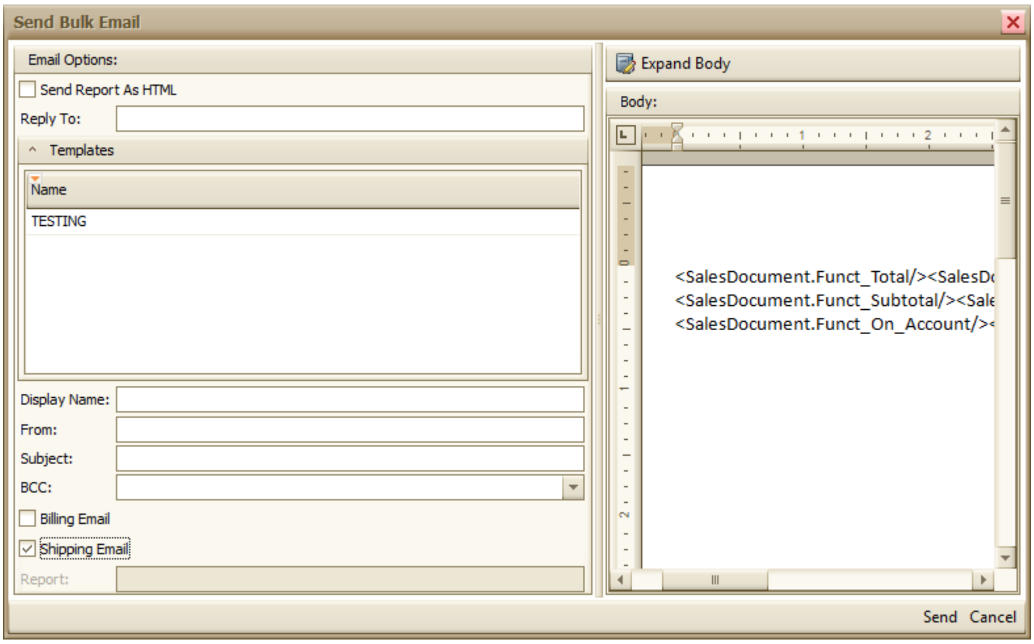


The sales document will pull the customer Ship address email into the sales document shipping email and the customer Bill address email into the sales document billing email. This will only automatically populate for new sales documents. All preexisting sales documents must be manually updated.
Once email addresses are populated, you can email documents in Sales Batch Processing.

5. Click the **Email** button. The Sales Batch Processing Emails screen will appear



6. Select the related report(s) you wish to email and click **Proceed**. The Send Bulk Email screen will appear.
   Note: In a batch mode, the preview will show only the template and not a populated version of the document



7. Select whether to send to the Shipping Email or the Billing Email (from the Customer Card Contact Card) and fill in the other Email Options
8. Select a template for the email. A personal message can be added to the body
9. Click **Send**. The document(s) will be sent and a confirmation window will appear, which can be printed or closed

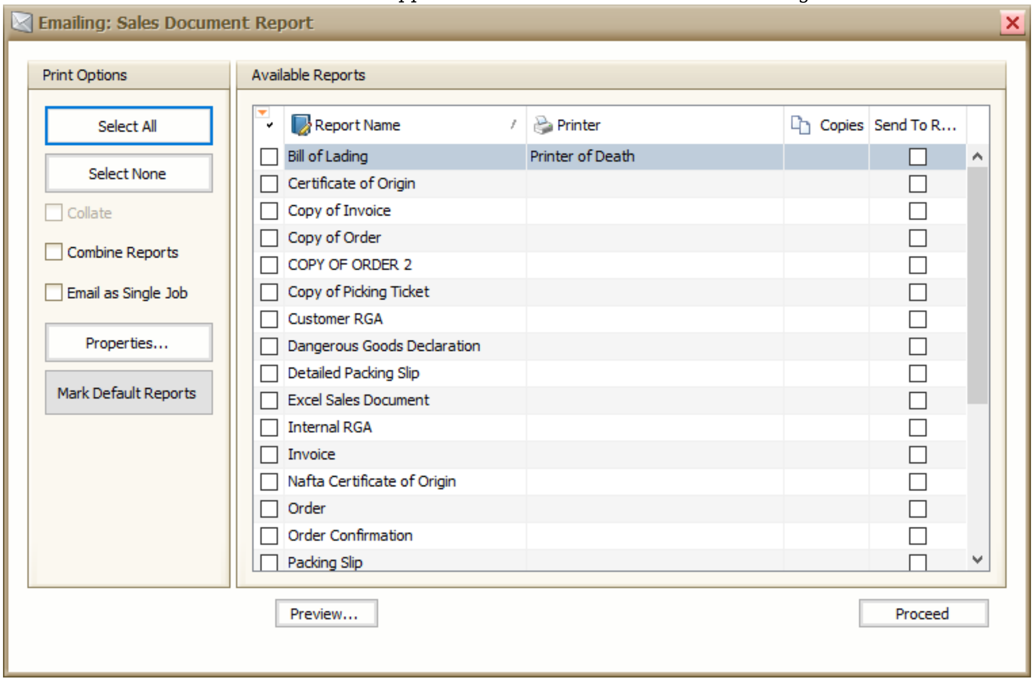
Fax

Clicking this button will start the process of faxing selected documents (or all documents in the Search Results grid, if the Selected Documents Only box is left unchecked).
Note: You must have valid Email/Fax Server setup to use this function.

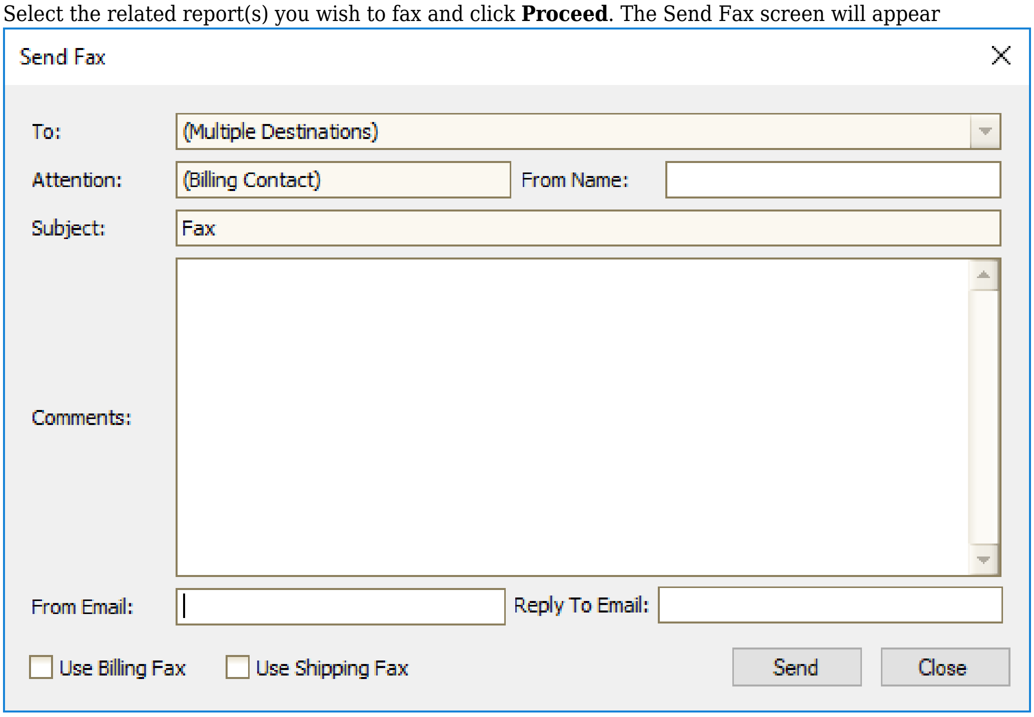
Note: Before you click the **Fax** button, make sure that the fax number field is populated. If the customer's **Don't Fax** box is checked (viewable from Customer Search), a fax will not be sent.

Procedure

1. Make sure the fax fields are populated
2. If they are, proceed to step 5. If they are not, you can update them from each sales document, on the Addresses tab Fax field
3. After updating, save and close the document
4. Refresh the information in Sales Batch Processing
   Note: To automatically populate these values for new sales documents, you can fill them out on the Customer Card > Contact Addresses > Fax field. This will only automatically populate for new sales documents. All preexisting sales documents must be manually updated.
   Once fax numbers are populated, you can fax documents in Sales Batch Processing.
5. Click the **Fax** button. The same screen appears as does for Sales Batch Processing Emails:



6. Select the related report(s) you wish to fax and click **Proceed**. The Send Fax screen will appear



7. Fill in the necessary fields and select whether to send to the Billing Fax, Shipping Fax, or both (based on

the Contact Address codes on the Customer Card)

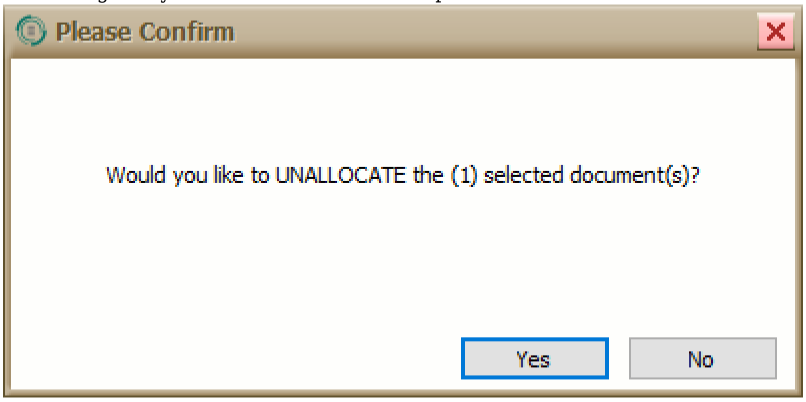
8. Click **Send**. The document(s) will be faxed and a confirmation window will appear, which can be printed or closed

UNALLOCATE

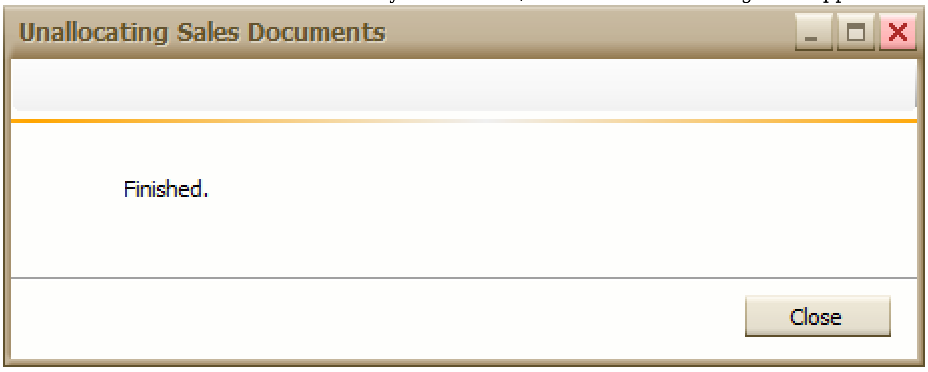
This button is new for versions 4.1 and later and requires proper security. Clicking the **Unallocate** button will remove allocation of all lines on selected documents (or all documents in the Search Results grid, if the Selected Documents Only box is left unchecked).

Procedure:

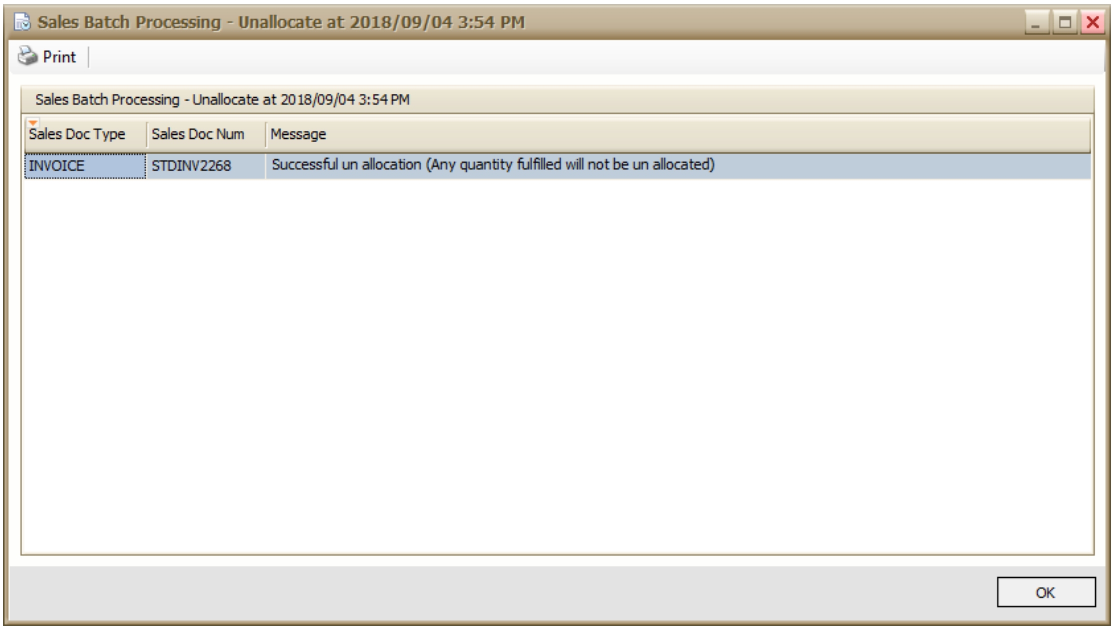
1. Search for and select the document(s) you wish to unallocate lines for. A pop-up box will appear, confirming that you want to unallocate the specified number of documents



2. Click **Yes**. The "Unallocating Sales Documents" screen appears, until all selected documents have been unallocated. This may take some time.
3. When documents have been successfully unallocated, a confirmation message will appear:



4. Click **Close**. A confirmation log will appear that can either be printed or closed



Security

*Sales Batch Processing** - Enables the Sales Batch Processing module for the Security Group

Settings

Invoice Date Source - Determines the date used for Invoices (Source_Document_Date, Today, Application_Date, Actual_Ship_Date)

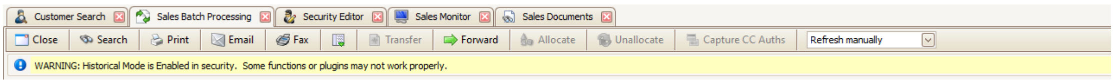
Note: If Print as Single Job and Email as Single Job are both set to True, and documents are emailed or faxed in bulk, the email (one per customer) will be sent as a single email with a single attachment. If *Print as Single Job* is set to False, but Email as Single Job is set to True, the email will be sent as a single email, but with multiple attachments. For more details, refer to [Emailing and Printing as a Single Job] document.

Historical Mode

There is a sub-security for Sales Batch processing for Enable Historical Mode. Introduced in version 5.2.15, this security will show only historical, not voided or open, documents in Sales Batch Processing so that they can trigger workflow plugins. Historical Mode will also only return Quotes, Orders and Invoices. Because this setting applies to all users in the user group of the Security Editor, it may be best to create a specific group to have this setting enabled so as not to affect other user groups.

To re-run plugins, you have to set up a “NEXT QUEUE” in Sales Document Workflow Setup for the queue(s) that documents are transferred or posted from, and add the desired plugin to that queue in the workflow setup. When the document is forwarded from Sales Batch Processing and Historical Mode is enabled, the document will trigger the plugin but not actually move the document to another queue. A blank message will be displayed in the results window after forwarding the document.

NOTE: Some plugins or functionalities may not work properly on historical documents. The Transfer, Allocate, Unallocate, and Capture CCAuth buttons are disabled and there is a banner that populates at the top of the screen to let users know that Historical Mode is enabled.



Standard functionality for Print, Email, and Forward apply. Search, custom Search, Search Options and Options all function the same as if Historical Mode were disabled.