Sales Document Consolidation

Product Development - 2026-08-07 - Sales

Overview

Sales Document Consolidation allows you to consolidate a group of documents for a customer into one, allowing for simpler record keeping and invoicing to your customers. Documents can be manually selected from the Customer card or Sales Batch Processing screens, and go through validation before being combined into a single sales document for a customer.

Sales Document Consolidation works similar to the existing Document Combiner plugin in that they both take multiple documents and merge them together, but differs in that Consolidation allows users to combine documents that were not split from the same source document. Another difference is that Consolidation is done manually by a user and cannot be triggered using workflow.

Document Consolidation Requirements

Consolidation has many customizable settings that allow users to determine what kind of documents should and should not be allowed to be combined, how the document is combined, and what actions to perform on the final document after consolidation. For example, it can be set up so that only documents that are fully paid can be combined, and during consolidation, line items are combined if the line items match, and then the document is transferred to an invoice. Each step of this process is guided by various settings.

Consolidation does have some hard restrictions for when documents can be combined. All documents that are part of a consolidation must conform to the following restrictions:

- Matching customers
- Matching Doc ID and Doc Type
- All documents must be in the same batch
- Matching currency
- No backordered line items
- No Holds
- No active Nodus PayLinks or Square Payment Links
- Must not originate from an EDI document
- Must not originate from an ecommerce platform integration
- SalesPad support for Sales Document Consolidation is available as of SalesPad 5.7.?

Settings

Additional Sales Line Fields Required To Consolidate - A list of additional fields required to be equivalent before lines will be consolidated.

Additional Requirements to Consolidate - Specify additional requirements for documents to meet before they can be consolidated. This includes requiring documents to be fully fulfilled, have a matching Sales Rep, and/or the documents being fully paid.

Automatically Transfer Consolidated Order To Invoice - When enabled, the consolidated order document will automatically be transferred to an invoice. (Default Value: false)

Automatically Transfer Consolidated Quote To Order - When enabled, the consolidated quote document will automatically be transferred to an order. (Default Value: false)

Combine Similar Lines - When enabled, line items with the same Item Number, Unit of Measure, and Warehouse will be combined into one line item. (Default Value: false)

Forward After Consolidation - Choose which document types should

automatically be forwarded after a consolidated document is created.
NOTE: This setting takes precedence over the 'Automatic Transfer' settings.

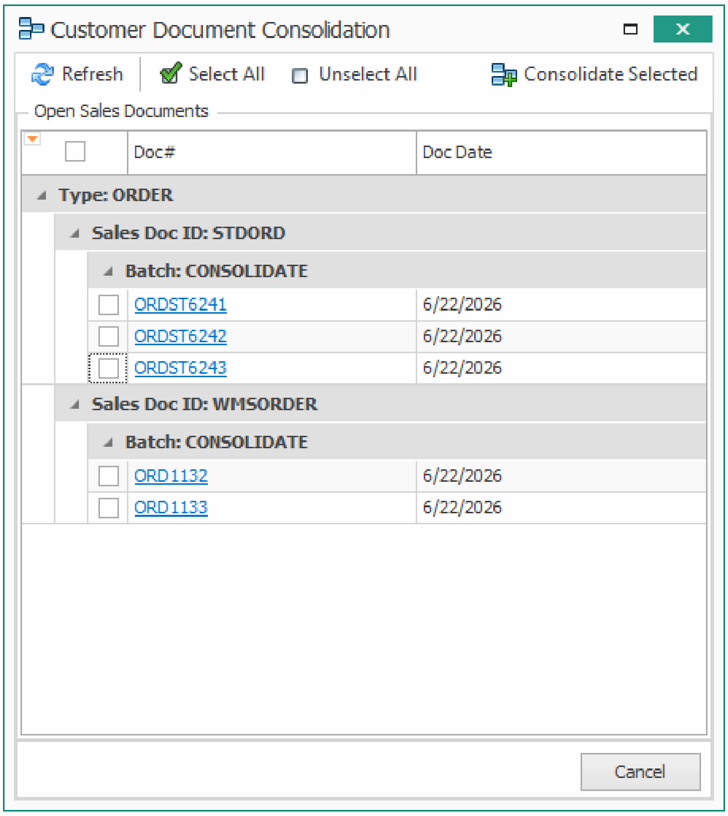
Void Originating Documents - When enabled, the originating documents used to create the consolidated document will be voided rather than moved to history. (Default Value: false)

Pre Validate Consolidation Script - C# script that executes before consolidation and can be used to further customize which documents should be consolidated. This script can also be used to halt the consolidation process.

Customer Document Consolidation Batches - Specify Sales Batches that documents must be in to proceed with document consolidation. Each document must be in the same queue to combine.

Sales Batch Processing Document Consolidation Batches - Specify Sales Batches that documents must be in to proceed with document consolidation. Each document must be in the same queue to combine.

Customer Document Consolidation



The Customer Document Consolidation plugin can be found on the Customer Card in the action drop down menu when security is enabled. The documents in the grid are populated based on which Sales Doc Type, Sales Doc ID and Batch combinations have been defined in the Customer Document Consolidation Batches setting, and then grouped by these respective properties. Users can then select which documents will make up the consolidated document and click the ‘Consolidate Documents’ button in the toolbar to begin the process. If there are any issues during consolidation, the process is halted and no changes are made to the documents. Any validation errors or exception messages that occur will be displayed as well.

Once the consolidation process is complete, the user will be informed that the document has been created successfully and then the document either remains in the current batch, or is forwarded or transferred depending on the Settings configuration.

Sales Batch Processing Document Consolidation

The Sales Batch Processing Document Consolidation plugin can be found on the Sales Batch Processing screen in the action drop down menu when the security is enabled. In lieu of its own UI, this plugin utilizes Sales Batch Processing’s grid. When the Selected Documents Only option in Sales Batch Processing is selected, any selected document in the grid will be used as part of the consolidation process. If the Selected Documents Only option is not selected, then all documents in the grid will be used as part of the consolidation process.

Before consolidation begins, the documents will be validated first, and any unsuccessful validations with any of the documents will be presented to the user via a prompt. If all documents are validated successfully, then the user will be asked if they are sure that they want to continue with the process and how many documents will be consolidated.

Once the consolidation process is complete, the user will be informed that the document has been created successfully, and then the document will remain in the current batch, or be forwarded or transferred depending on Settings.