<u>Knowledgebase</u> > <u>SalesPad</u> > <u>Setup</u> > <u>Sales Document Setup</u>

## **Sales Document Setup**

Megan De Freitas - 2024-12-03 - Setup

## Overview

Sales Document Setup is a module within SalesPad that allows users to edit how a sales document transfers between document types. In this documentation, you will learn about how to edit document types and save them. Any relevant security and application settings will be discussed at the end of the document.

Usage

To open Sales Document Setup, go to the Setup / Utilities tab, then click on Sales Document Setup.

	Application	CRM	Distribution BOM	Equipment Management	Inventory	Purcha	asing	Reporting	Sales	Setup / Utilities
G	P	🐚 Email Template Editor 🎡 Equipment Migration Tool 🕞 Import Manager		🧑 Resource Migrator	B March Rome Carbon		📭 Layout Maintenance			
				📓 Sales Document Setup			🥵 Registry Maintenance			
Resource Search	System Log Search			🐚 SMTP Setup						
Lookups 🕞				Setup / Utilities		E.		Maintenance	e r	<u>a</u>

With Sales Document Setup, it is possible to edit certain fields for each document ID. The fields available for edit are Next Doc ID1, Next Doc ID2, Return Doc ID, Return AutoFill, and Exchange Doc ID. You can also view if documents have Manual Fulfillment, allow Quote to Order, allow Quote to Invoice, and how items are allocated.

Sales Doci	ument Setup 🗙										
📑 Close 🛛 🍣	Refresh 🛛 🛃 Save										
Changes ma	ade require the user t	o log out of Salesi	Pad.								
Sales Documer	nt Information										
Sales Doc ID	Sales Doc Type	Next Doc ID1	Next Doc ID2	Return Doc ID	Return AutoFulfill	Exchange Doc ID	Use Manual Ful	Quote To Order	Comment ID	Quote To Invoice	Allocate B
BLKQTE	QUOTE	PHNORD						<ul> <li>Image: A start of the start of</li></ul>			None
REPQTE	QUOTE	STDORD						<b>v</b>			None
STDQTE	QUOTE	STDORD	STDINV					~		<ul> <li>Image: A start of the start of</li></ul>	None
BLKORD	ORDER	BKORD	STDINV								None Back Order
ORDMAN	ORDER	BKORD	STDINV				<ul> <li>Image: A start of the start of</li></ul>				DocumentBatch
PHNORD	ORDER	BKORD	POSINV								DocumentBatch
REPORD	ORDER	BKORD	SERVINV								DocumentBatch
RMAORD	ORDER		RMAINV								LineItem
SPECORD	ORDER		SPECINV				<ul> <li>Image: A start of the start of</li></ul>				DocumentBatch
STDORD	ORDER	BKORD	STDINV								LineItem
WMSORDER	ORDER	BKORD	STDINV				<b>v</b>				LineItem
CAINV	INVOICE				~						LineItem
FULORD	INVOICE	BKORD			~						LineItem
POSINV	INVOICE	BKORD			~						LineItem
RMAINV	INVOICE				~						LineItem
SERVINV	INVOICE	BKORD			<ul> <li>Image: A start of the start of</li></ul>						DocumentBatch
SPECINV	INVOICE	BKORD			<ul> <li>Image: A start of the start of</li></ul>		<b>v</b>				DocumentBatch
STDINV	INVOICE	BKORD		RTN   RETURN	<ul> <li>Image: A start of the start of</li></ul>	SPECINV					LineItem
SVCZERO	INVOICE				~						LineItem
CARTN	RETURN				<ul> <li>Image: A start of the start of</li></ul>						None
RMARTN	RETURN				<ul> <li>Image: A start of the start of</li></ul>						None
RTN	RETURN	STDINV			<ul> <li>Image: A start of the start of</li></ul>						None
SVCRTN	RETURN				~						None
BKORD	BACKORDER	STDORD	STDINV								None

## **Return AutoFulfill Checkbox**

If the Return AutoFulfill checkbox is checked, returns created from posted invoices will have their line items automatically fulfilled, based on the quantities from the invoice. Standalone returns will also fulfill non-tracked items automatically.

If left unchecked, no quantities will be automatically fulfilled, allowing for separate fulfillment of the return.

## Security Settings

Sales Document Setup - Allows users to see and use the Sales Document Setup Module