



## Sales Document Setup

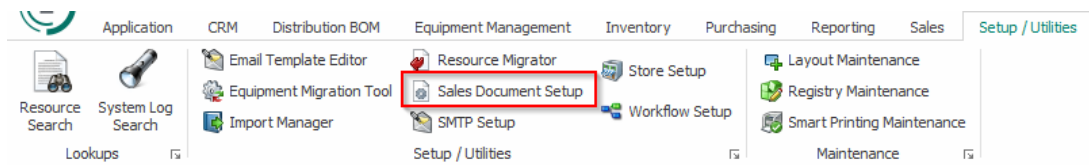
Megan De Freitas - 2024-12-03 - Setup

### 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**.



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 Doc ID	Sales Doc Type	Next Doc ID1	Next Doc ID2	Return Doc ID	Return AutoFill	Exchange Doc ID	Use Manual Ful...	Quote To Order	Comment ID	Quote To Invoice	Allocate By
BLKQTE	QUOTE	PHNORD			<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	None
REPQTE	QUOTE	STDORD			<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	None
STDQTE	QUOTE	STDORD	STDINV		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	None
BLKORD	ORDER	BKORD	STDINV		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	None Back Order
ORDMAN	ORDER	BKORD	STDINV		<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	DocumentBatch
PHNORD	ORDER	BKORD	POSINV		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	DocumentBatch
REPORD	ORDER	BKORD	SERVINV		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	DocumentBatch
RMAORD	ORDER		RMAINV		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
SPECORD	ORDER		SPECINV		<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	DocumentBatch
STDORD	ORDER	BKORD	STDINV		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
WMSORDER	ORDER	BKORD	STDINV		<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
CAINV	INVOICE				<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
FULORD	INVOICE	BKORD			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
POSINV	INVOICE	BKORD			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
RMAINV	INVOICE				<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
SERVINV	INVOICE	BKORD			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	DocumentBatch
SPECINV	INVOICE	BKORD			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	DocumentBatch
STDINV	INVOICE	BKORD		RTN   RETURN	<input checked="" type="checkbox"/>	SPECINV	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
SVCZERO	INVOICE				<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	LineItem
CARTN	RETURN				<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	None
RMARTN	RETURN				<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	None
RTN	RETURN	STDINV			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	None
SVCRTN	RETURN				<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	None
BKORD	BACKORDER	STDORD	STDINV		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	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