Sales Document Setup

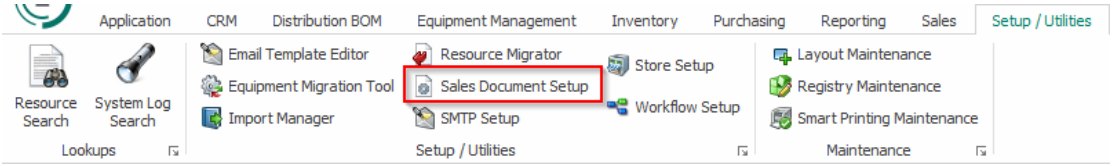
Cavallo Support - 2026-01-15 - Setup

Overview

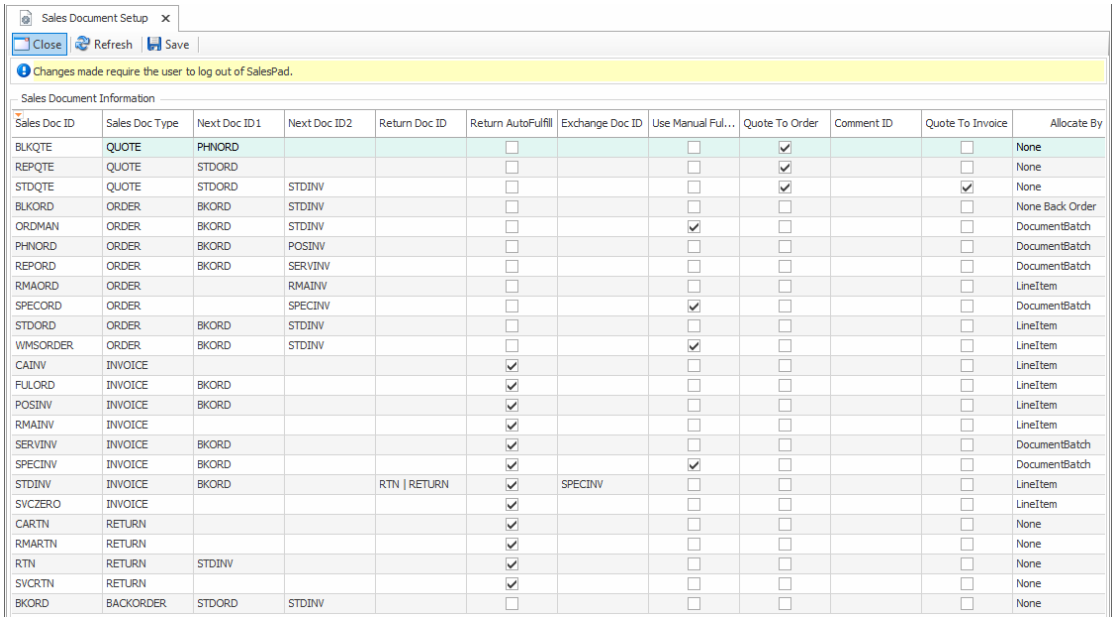
Sales Document Setup is a module within SalesPad that allows users to edit how a sales document transfers between document types. In this documentation, you will learn about how to edit document types and save them. Any relevant security and application settings will be discussed at the end of the document. This screen presents the setup that you'd see in Great Plain's Sales Order Processing setup.

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 Document Setup

Close | Refresh | Save

Changes made require the user to log out of SalesPad.

Sales Document 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 By
BLKQTE	QUOTE	PHNORD			☐		☐	☑		☐	None
REPQTE	QUOTE	STDORD			☐		☐	☑		☐	None
STDQTE	QUOTE	STDORD	STDINV		☐		☐	☑		☑	None
BLKORD	ORDER	BKORD	STDINV		☐		☐	☐		☐	None Back Order
ORDMAN	ORDER	BKORD	STDINV		☐		☑	☐		☐	DocumentBatch
PHNORD	ORDER	BKORD	POSINV		☐		☐	☐		☐	DocumentBatch
REPORD	ORDER	BKORD	SERVINV		☐		☐	☐		☐	DocumentBatch
RMAORD	ORDER		RMAINV		☐		☐	☐		☐	LineItem
SPECORD	ORDER		SPECINV		☐		☑	☐		☐	DocumentBatch
STDORD	ORDER	BKORD	STDINV		☐		☐	☐		☐	LineItem
WMSORDER	ORDER	BKORD	STDINV		☐		☑	☐		☐	LineItem
CAINV	INVOICE				☑		☐	☐		☐	LineItem
FULORD	INVOICE	BKORD			☑		☐	☐		☐	LineItem
POSINV	INVOICE	BKORD			☑		☐	☐		☐	LineItem
RMAINV	INVOICE				☑		☐	☐		☐	LineItem
SERVINV	INVOICE	BKORD			☑		☐	☐		☐	DocumentBatch
SPECINV	INVOICE	BKORD			☑		☑	☐		☐	DocumentBatch
STDINV	INVOICE	BKORD		RTN | RETURN	☑	SPECINV	☐	☐		☐	LineItem
SVCZERO	INVOICE				☑		☐	☐		☐	LineItem
CARTN	RETURN				☑		☐	☐		☐	None
RMARTN	RETURN				☑		☐	☐		☐	None
RTN	RETURN	STDINV			☑		☐	☐		☐	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