Sales Document Setup

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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.

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