Sales Document Type

Megan De Freitas - 2024-12-02 - Settings

Overview

The Sales Document Type feature of SalesPad Cloud allows you to create a variety of different Sales Document Types, including estimates/quotes, orders, invoices, returns, sales receipts, and refund receipts. By default, SalesPad Cloud creates one of each Sales Document Type for you when you create a new company. You can rename these or create new Sales Document Types as needed.

To get started, select **Sales Document Type** from the Settings menu.

Navigation Menu

Sales Document Type

Create a Sales Document Type

To create a Sales Document Type, click the **New Sales Document Type** button in the upper left-hand corner of the screen.

The Create Sales Document Type drawer will appear. Fill out the information fields in this drawer. Depending on which Sale Type you select, some of the available fields will vary.

For a brief description of the different information fields in the Create Sales Document Type drawer, click here:

Create Sales Document Type

For Sales Document Types with an Estimate Sale Type:

Display Name - Allows you to name the Sales Document Type

Sale Type - Selects between Estimate, Order, Invoice, Return, Sales Receipt, or Refund sale type

Workflow - Designates which Workflow the document will appear in

Can Transfer To - Selects what other types of documents this document can be transferred to (as an example, an Estimate might transfer to an Order)

Payments Allowed - Allows payments on the document

Shown - Allows the document to be shown on your Quickbooks Online account

For Sales Document Types with an Order Sale Type:

Display Name - Allows you to name the Sales Document Type

Sale Type - Selects between Estimate, Order, Invoice, Return, Sales Receipt, or Refund sale type

Workflow - Designates which Workflow the document will appear in

Lot Fulfillment Method - Determines if the lot fulfillment method used for this document is automatic or manual

Can Transfer To - Selects what other types of documents this document can be transferred to (as an example, an Estimate might transfer to an Order)

Serial Fulfillment Method - Determines if the serial fulfillment method used for this document is automatic or manual

Allocation Method - Determines if the allocation method used for this document is automatic or manual

Can Dropship - Allows dropshipping on the document

Can Partially Invoice - Allows the document to be partially invoiced

Can Ship - Allows shipment on the document

Payments Allowed - Allows payments on the document

Shown - Allows the document to be shown on your Quickbooks Online account

For Sales Document Types with an Invoice Sale Type

Display Name - Allows you to name the Sales Document Type

Sale Type - Selects between Estimate, Order, Invoice, Return, Sales Receipt, or Refund sale type

Workflow - Designates which Workflow the document will appear in

Lot Fulfillment Method - Determines if the lot fulfillment method used for this document is automatic or manual

Fulfillment Method - Determines if the document is automatically or manually fulfilled

Serial Fulfillment Method - Determines if the serial fulfillment method used for this document is automatic or manual

Can Dropship - Allows dropshipping on the document

Can Post - Allows the document to be posted to your Quickbooks Online account

Can Purchase - Allows purchasing on the document

Can Ship - Allows shipment on the document

Payments Allowed - Allows payments on the document

Shown - Allows the document to be shown on your Quickbooks Online account

For Sales Document Types with a Return Sale Type

Display Name - Allows you to name the Sales Document Type

Sale Type - Selects between Estimate, Order, Invoice, Return, Sales Receipt, or Refund sale type

Workflow - Designates which Workflow the document will appear in

Can Post - Allows the document to be posted to your Quickbooks Online account

Payments Allowed - Allows payments on the document

Shown - Allows the document to be shown on your Quickbooks Online account

For Sales Document Types with a Sales Receipt Sale Type

Display Name - Allows you to name the Sales Document Type

Sale Type - Selects between Estimate, Order, Invoice, Return, Sales Receipt, or Refund sale type

Workflow - Designates which Workflow the document will appear in

Lot Fulfillment Method - Determines if the lot fulfillment method used for this document is automatic or manual

Fulfillment Method - Determines if the document is automatically or manually fulfilled

Serial Fulfillment Method - Determines if the serial fulfillment method used for this document is automatic or manual

Can Dropship - Allows dropshipping on the document

Can Post - Allows the document to be posted to your Quickbooks Online account

Can Purchase - Allows purchasing on the document

Can Ship - Allows shipment on the document

Payments Allowed - Allows payments on the document

Shown - Allows the document to be shown on your Quickbooks Online account

For Sales Document Types with a Refund Sale Type

Display Name - Allows you to name the Sales Document Type

Sale Type - Selects between Estimate, Order, Invoice, Return, Sales Receipt, or Refund sale type

Workflow - Designates which Workflow the document will appear in

Can Post - Allows the document to be posted to your Quickbooks Online account

Payments Allowed - Allows payments on the document

Shown - Allows the document to be shown on your Quickbooks Online account

---

When you've finished entering your information, click **Save**.

Back to Navigation Menu

Edit a Sales Document Type

To edit an existing Sales Document Type, first select the Sales Document Type from the list on the left-hand side of the Sales Document Type window.

Once you've selected the Sales Document Type you want to edit, make your changes in the information fields on the right-hand side of the screen.

When you've finished making your changes, click **Save**.

Back to Navigation Menu

See it in Action

Sales Document Types appear in the **New Transaction** dropdown in the Sales module.

Back to Navigation Menu