Send Sales Document To

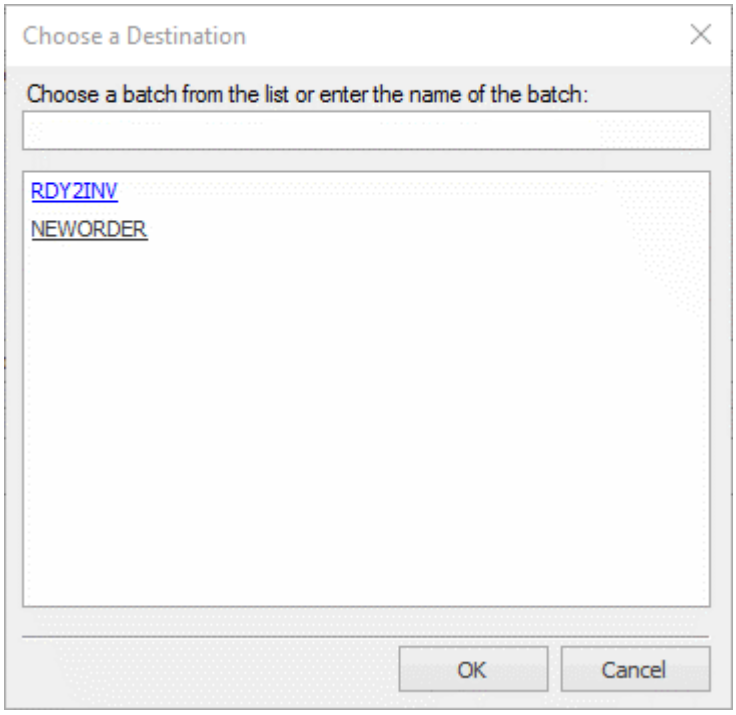
Cavallo Support - 2024-11-22 - Sales

Overview

Send Sales Document To is a SalesPad security setting that determines whether users can choose where a Sales Document goes when a workflow has more than one destination. For more information on workflow setup, refer to the Workflow documentation.

Usage

To use this window, create a workflow that has multiple destinations, then forward a document through that workflow. A window will pop up where you can choose the destination.



Security

Send Sales Document To – Enables the Choose a Destination window.

Note: If there is a workflow with multiple workflows and this security is disabled, you will be unable to forward the documents in that workflow.