Splitting Sales Documents

Cavallo Support - 2024-12-03 - Sales

Overview

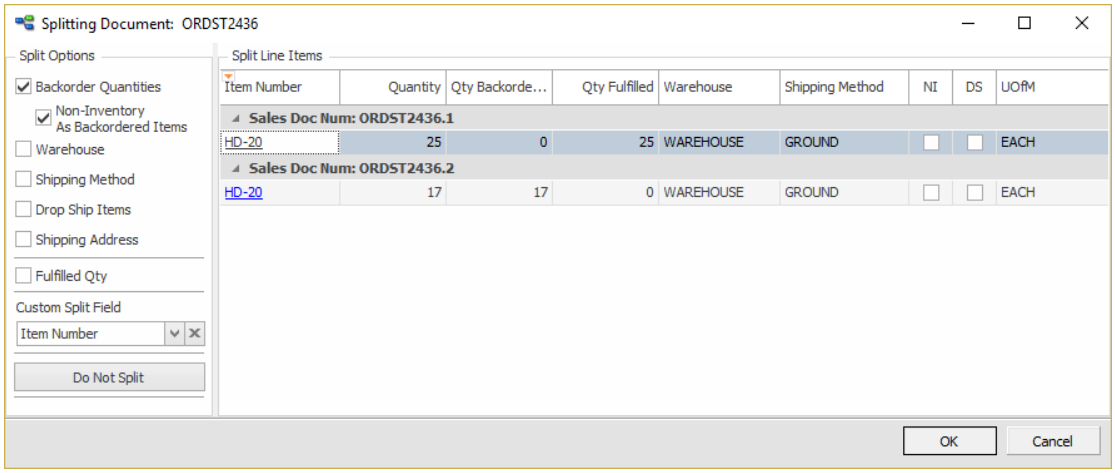
In SalesPad, sales documents can be split from the Sales document entry screen, and as they move through workflow. A single sales document can be split into separate documents on a line item basis when the items have met certain criteria, which can be configured in the Security Editor.

Usage

Splitting a Sales Document

To split a sales document from the Sales document entry screen, select Split Sales Document from the **Actions** dropdown menu on the sales document header.

The Splitting Document window will display the current criteria the document is splitting on.



This criteria can be changed by setting the Split Options according to how users want the document to be split.

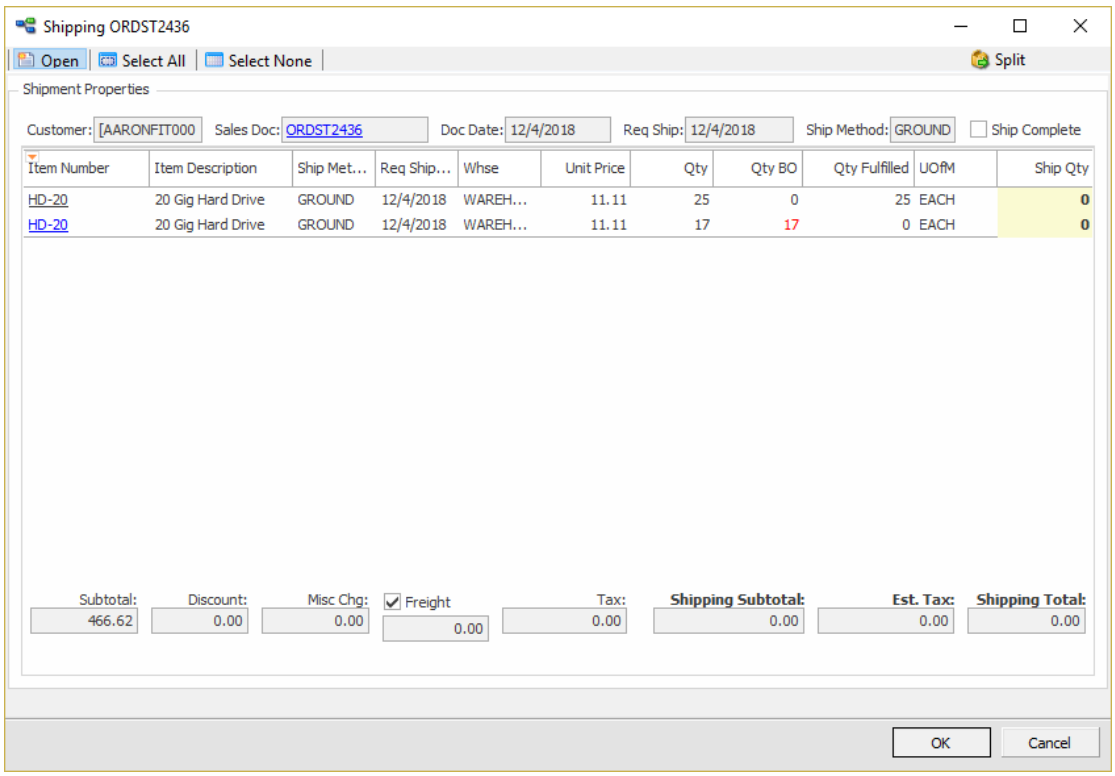
Click **OK** to trigger the split.

Once a document is split, the original document no longer exists. The new split documents will have the same base document number (ex. ORDST0019103.1 and ORDST0019103.2).

Sales Document Manual Split

Users can also manually split a document and assign quantities of each item to a split.

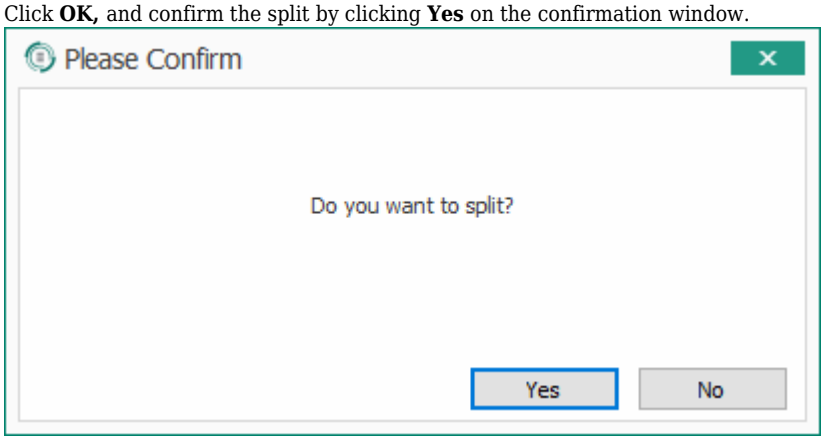
To manually split a document, click the **Actions** button and select Sales Document Manual Split to open the manual split screen.



This screen shows details for each line item.

Under **Ship Qty**, enter the quantities of each item to split onto a new related document

Click **OK,** and confirm the split by clicking **Yes** on the confirmation window.

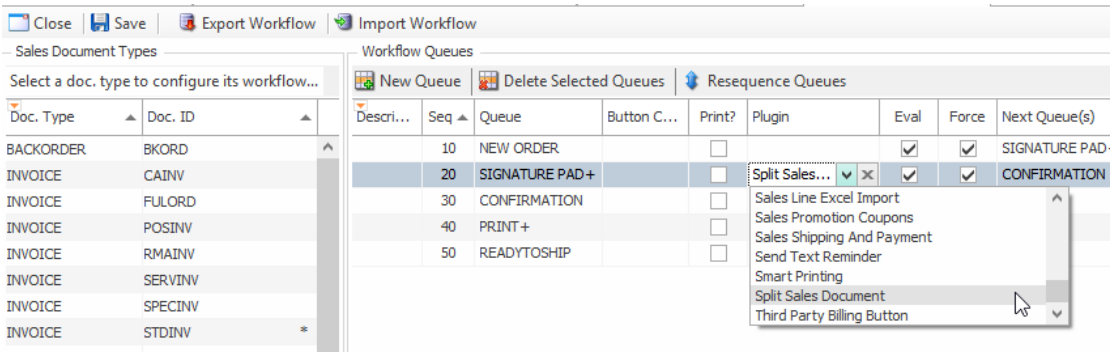


Click **OK** to return to the sales document.

The quantity amounts will have changed on the open order. To view the new split document, click the Related Documents tab and select the document (it will have the same order number followed by a decimal). Users can continue to split the document as needed.

Workflow

To set up workflow to automatically split documents from the Workflow Setup module, select the document type from the Sales Document Types grid. In the Workflow Queues grid, click the dropdown arrow in the Plugin field and select Split Sales Document



Click **Save** for the changes to take effect.

Security

Document Release - Allows forwarding documents through work flow. Button text must be defined in the Workflow Setup module. Set sub-securities as desired to allow document splitting through the Document Release plugin on the Sales Document header.

Sales Document Manual Split - Grants access to the Sales Document Manual Split plugin on the Sales Document Entry screen.

Split Sales Document - Grants access to the Split Sales Document Plugin on the Sales Document Entry screen.

Settings

Split Manual Payments - During document split, distribute manual payments evenly among the resulting documents. Functionality excludes CardControl and PayFabric payments.

Split Document - Set to True to prompt to split when a document is processed in the Funnel. Defaults to 'False'.

Split Sales Document On Release - If a sales document contains backordered items, it will be split and items will be shipped that are not on backorder. Defaults to 'False'.

Use Logged In User As Created By Document Splitting - Use the currently logged in user as the create by user for documents resulting from splits. Defaults to 'False'.

Items To Copy On Split - The Items (semi-colon delimited) to copy onto each split document when splitting. This item has no default value.

Void Original Split Order - When enabled, orders that have been split will be voided instead of moved to history. Defaults to 'False'.