Add Item Plugin

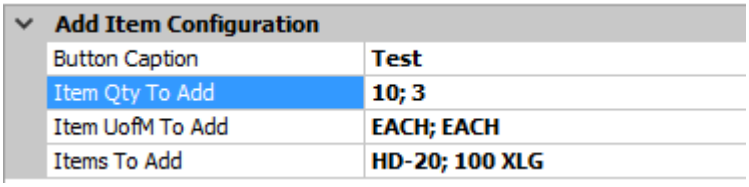
Cavallo Support - 2024-11-22 - Sales

Overview

The Add Item and Add Item to PO plugins allow users to add a set of items with a specific quantity and unit of measure type to a sales document or a purchase order. Before proceeding, please visit the Security Settings section at the end of this document to ensure that you won't run into difficulties.

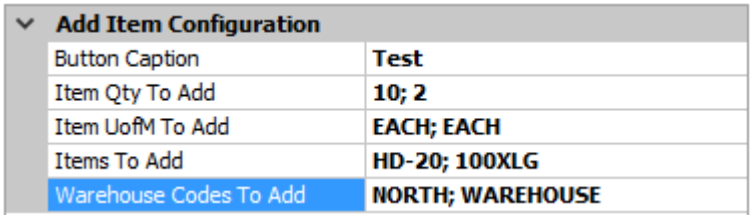
Setup

In order to properly use the Add Item plugin, you will need to set up the sub-securities for *Add Item* and *Add Item to PO*. For *Add Item*, The *Item Qty to Add*, *Item UofM to Add*, and *Items to Add* sub-securities will accept a semicolon delimited list, and these lists must match up with one another. Each item will match up with the corresponding UofM and Qty.



Add Item Configuration	
Button Caption	**Test**
Item Qty To Add	**10; 3**
Item UofM To Add	**EACH; EACH**
Items To Add	**HD-20; 100 XLG**

For *Add Item to PO*, you will need to list out the Item Qty, UofM, Number, and Warehouse. These lists will also need to have corresponding entries.

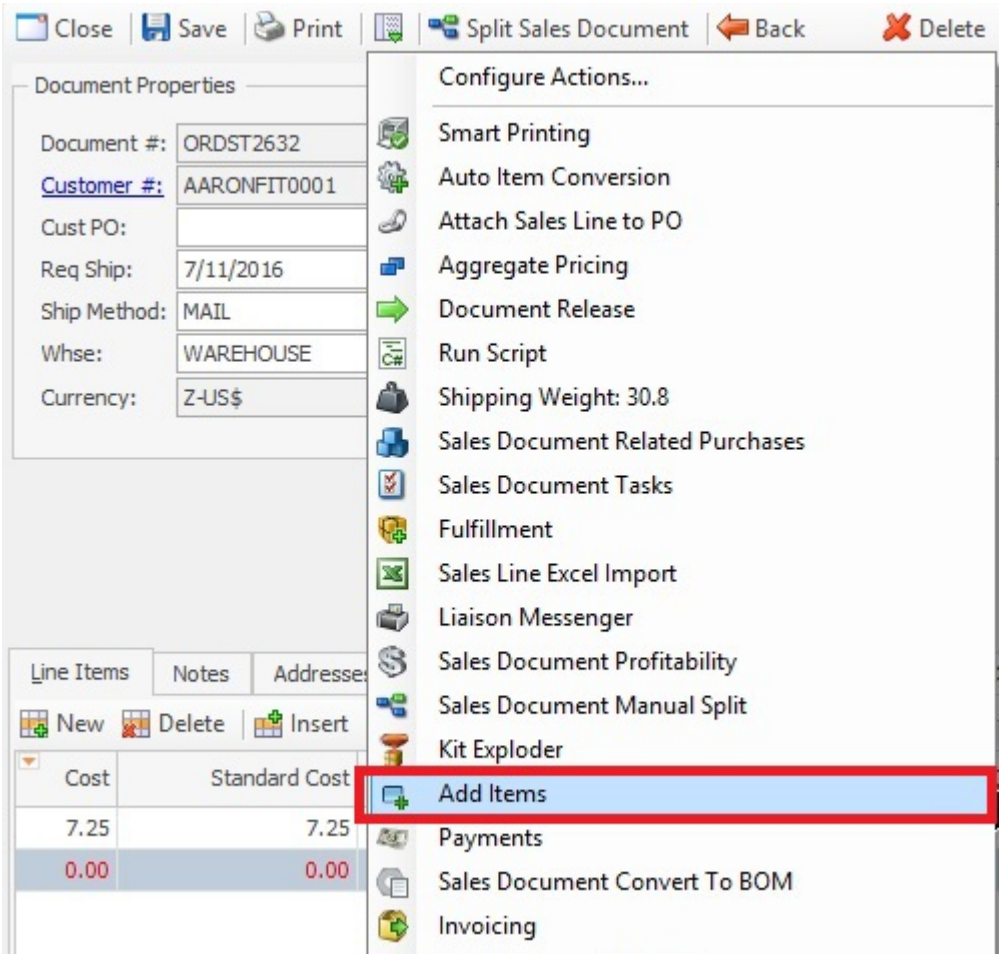


Add Item Configuration	
Button Caption	**Test**
Item Qty To Add	**10; 2**
Item UofM To Add	**EACH; EACH**
Items To Add	**HD-20; 100XLG**
Warehouse Codes To Add	**NORTH; WAREHOUSE**

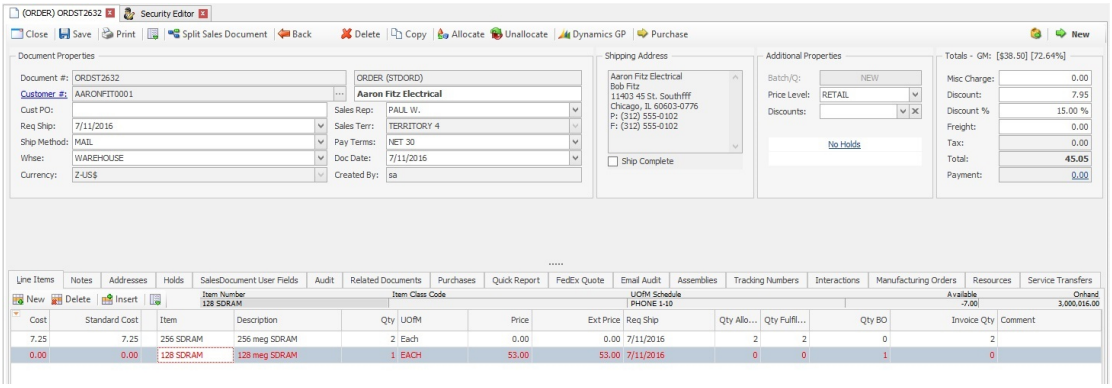
Usage

Adding Items to a Sales Document

To add items to a sales document, open an existing sales document or create a new sales document. Then, open the Sales Document **Actions** dropdown. From there, choose the Add Items Plugin. The items setup within Security Editor will now be added to the Sales Document.

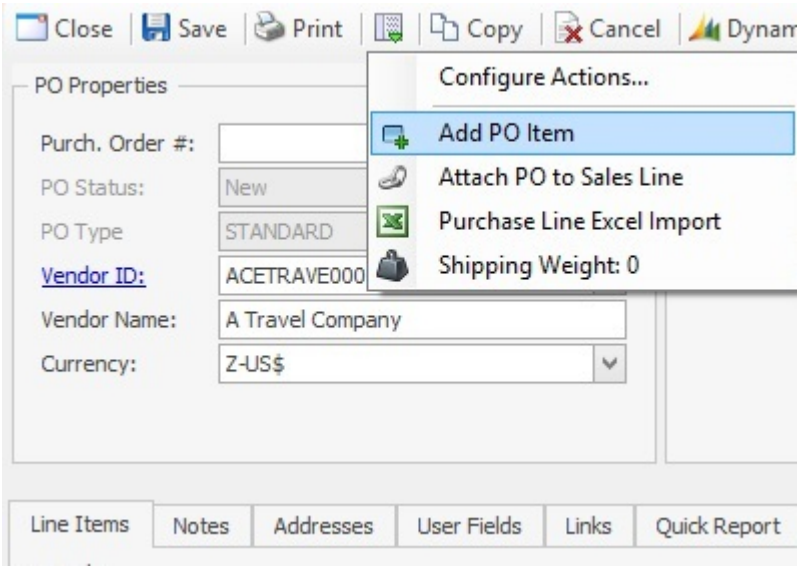


The results of the plugin are displayed below.

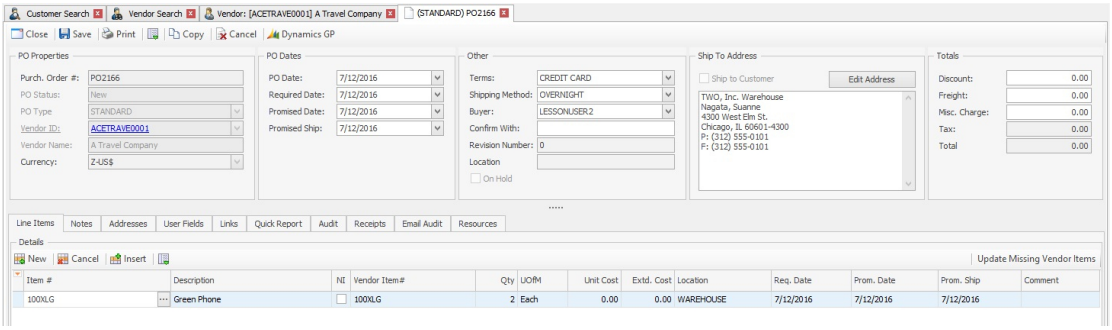


Adding Items to a Purchase Order

To add an item to a purchase order, open an existing purchase order or create a new purchase order. Next, open the Purchase Order **Actions** dropdown menu. From there, choose the Add PO Items Plugin. The items setup within Security Editor will now be added to the purchase order.



The results of the plugin are displayed below.



Security Settings

*Add Item** – Enable the Add Item module for Sales Documents

*Add Item To PO** – Enable the Add Item module for Purchase Orders

Note: Securities with an asterisk (such as *Add Item*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.