



Customer Default Items

Megan De Freitas - 2024-11-22 - Sales

Overview

Customer Default Items functionality allows users to store a list of items on the customer card in order to quickly and easily add the items to a sales document. This feature is particularly useful if a customer frequently orders the same set of items.

Use

To add default items for a customer from the customer's item history:

1. Select a customer and open the customer card
2. Open the Item History tab

Contact Addresses

CRM

Note

A/R

Item History

Sales Documents

Credit Cards

User Fields

Sales Graph

Months to Show:

6

+

+

+

Add One Time Items

+

+

+

Add Default Items

↺

↻

↻

Refresh

Doc Type

Item Number	Item Description	Quantity
100XLG	Green Phone	1
128 SDRAM	128 meg SDRAM	3
100XLG	Green Phone	1
100XLG	Green Phone	1
A100	Audio System	1

3. Select the item(s) that will be added to the customer's default items (CTRL+Click or Shift+Click to select multiple items)
4. Click **Add Default Items**. The selected items will be added to the Default Doc Items tab

To view/edit a customer's default items, open the Default Doc Items tab on the customer card:

CRM	Note	A/R	Item History	Sales Documents	Credit Cards	User Fields	Sales Graph	Extended Pricing	Customer Quick Reports	Default Doc Items	Item Sales	Recurring
+ Add Item - Remove Item Refresh												
		Qty	Item Number	Item Description		UOM						
		1	100XLG	Green Phone		Each						
		1	A100	Audio System		Each						
		1	COV100G	Green Cover		Each						
		9	WIRE-SCD-0001	Single conductor wire		FOOT						

All existing Default items will display in the list.

Removing an item: Highlight the items and click **Remove Item** to remove it. Click **OK** on the confirmation window that appears.

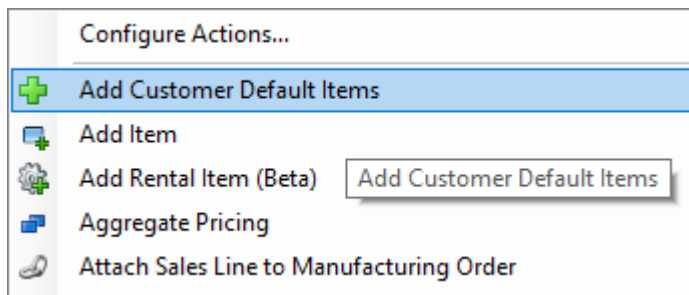
Adding an item: Click **Add Item**. A new line will appear in the grid. Enter an item number in the Item Number field or use the ellipsis (...) to search for and select an item (*Sales*

Inventory Lookup must be enabled in the Security Editor):

Item Number
100XLG ...

To add default items to a sales document:

1. Create or open a sales document for the customer
2. Select Add Customer Default Items from the **Actions** dropdown (📄) on the sales document header. The default items will be added to the sales document. If no default items are set up for the current customer, nothing will happen when Add Customer Default Items is selected.



If Add Customer Default Items > Prompt for Default Customer Items is set to True, there will be a prompt where you can select which Default Items are added to the document.

+ Add Customer Default Items

Sales Line Items

Item	Description	Qty	UoM	Price	Cost
128 SDRAM	128 meg SDRAM	1	EACH	169.00	0.00
CAP 100	Capacitor	1	Each	0.00	0.00
HD-40	40 Gig hard drive	1	EACH	0.00	0.00

OK Cancel

Click **OK** to add the items to the document.

Security

Add Customer Default Items* - Enables the Add Customer Default Items plugin on the sales

document.

Customer Default Doc Items - Enables the Default Doc Items tab on the customer card