



## Customer Default Items Manual Line Select

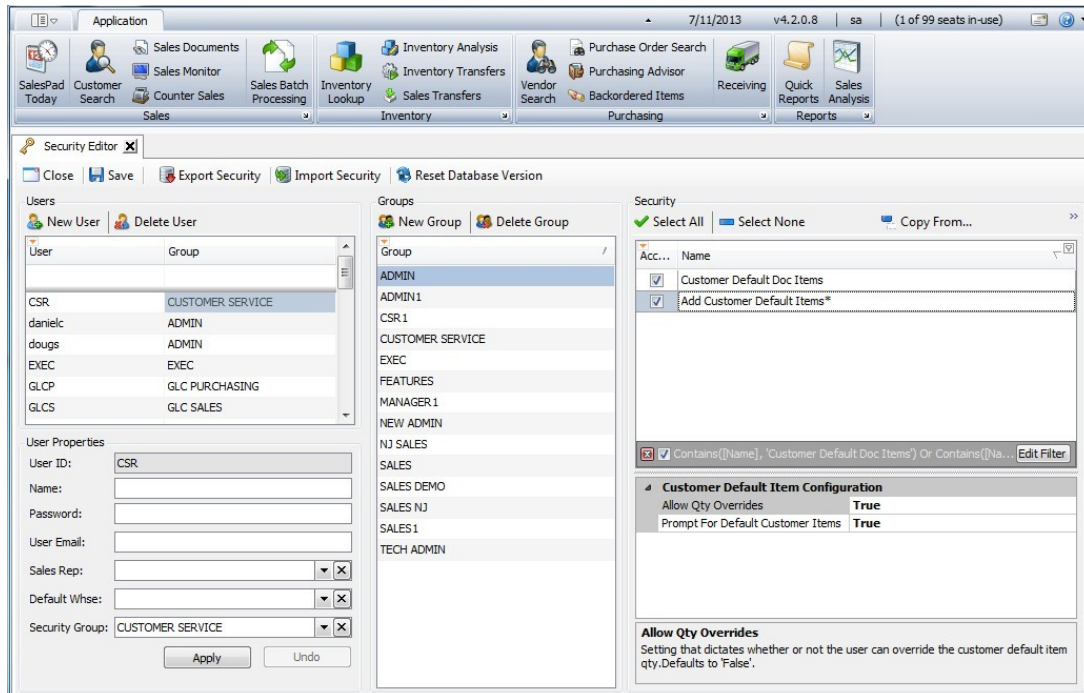
Megan De Freitas - 2024-11-22 - Sales

### Overview

Previously, you could not override the Customer Default Items when creating a new sales document. Now, you can manually select which items to add to a sales document in Sales Pad.

### Security

Open the Security Editor and search for “Customer Default.” Select *Add Customer Default Items* and, under *Customer Default Item Configuration*, set *Prompt for Default Customer Items* to True.



### Usage

1. Open the Customer Card you want to use and click on the “Default Doc Items” Tab.

**Note:** In this example, there are 3 items for this customer, configured to be default on the document. However, you may enter as many customer items as needed.

The screenshot shows the Dynamics GP Sales Documents window for customer Aaron Fitz Electrical. The window includes a toolbar with various functions like SalesPad, Customer Search, and Sales Documents. The main area displays customer properties, primary address information, and a list of open sales documents. Below this, there is a section for adding items to the sales document.

Item Number	Item Description	Qty	UOM
100X.G	Green Phone	2	PHONE 1-10
HD-40	40 Gig hard drive	2	EACH
HD-50	50 Gig Hard Drive	1	EACH

Now when you create a new sales document, you can select which items to default on the form.

1. Select **Distribution Order**
2. Click on the **Actions** dropdown in the header area of the new sales document
3. Click Add Customer Default Items.

The screenshot shows the Dynamics GP Sales Documents window with the Actions dropdown menu open. The menu lists various actions such as Sales Line Excel Import, Fulfillment, Shipping Weight, and Add Customer Default Items. The window also displays document properties and a list of items.

Code	UOM	Price	Cost	Ext Price	Req Ship	Qty BO	Comment

4. A popup screen prompts you to add the default items. Add the items by using your keyboard Shift or Ctrl keys.

**Add Customer Default Items**

Item	Description	Qty	UoM	Price	Cost
100XLG	Green Phone	2	PHONE 1...	30.00	0.00
HD-40	40 Gig hard drive	2	EACH	45.00	0.00
HD-50	50 Gig Hard Drive	1	EACH	49.00	0.00

OK Cancel

5. Click OK. This drives the items to the Sales Document. You can now edit the document as necessary.

Application 7/11/2013 v4.2.0.8 sa (1 of 99 seats in-use)

Customer Search Card: [AARONFIT0001] Aaron Fitz Electrical (ORDER)

Document Properties

Document #: AARONFIT0001

Customer #: AARONFIT0001

Req Ship: 7/11/2013

Ship Method: FEDEX GROUND

Whse: WAREHOUSE

Currency: Z-US\$

ORDER (DISTRIBUTION)

Sales Rep: IAN M.

Pay Terms: NET 30

Doc Date: 7/11/2013

Created By: sa

Approved By:

Shipping Address

Aaron Fitz Electrical  
Robert Fitz Jr.  
1201 56th Ave.  
Chicago, IL 60603-0776  
P:(312) 555-0102  
F:(312) 555-0102

Additional Properties

Batch/Q: PENDING ORDER

Price Level: RETAIL

Discounts:

Totals - GM: [-\$1,036.26] [-963.96%]

Misc Charge: 0.00

Discounts: 2.15

Freight: 0.00

Tax: 0.00

Total: 105.35

Payment: 0.00

Line Items

Item	Description	Qty	UoM	Price	Cost	Ext Price	Req Ship	Qty BO	Comment
100XLG	Green Phone	2	PHONE 1...	0.00	555.00	0.00	7/11/2013	0	
HD-40	40 Gig hard drive	2	EACH	45.00	12.00	90.00	7/11/2013	0	
HD-50	50 Gig Hard Drive	1	EACH	17.50	9.76	17.50	7/11/2013	0	

107.50