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Customer Default Items Manual Line Select

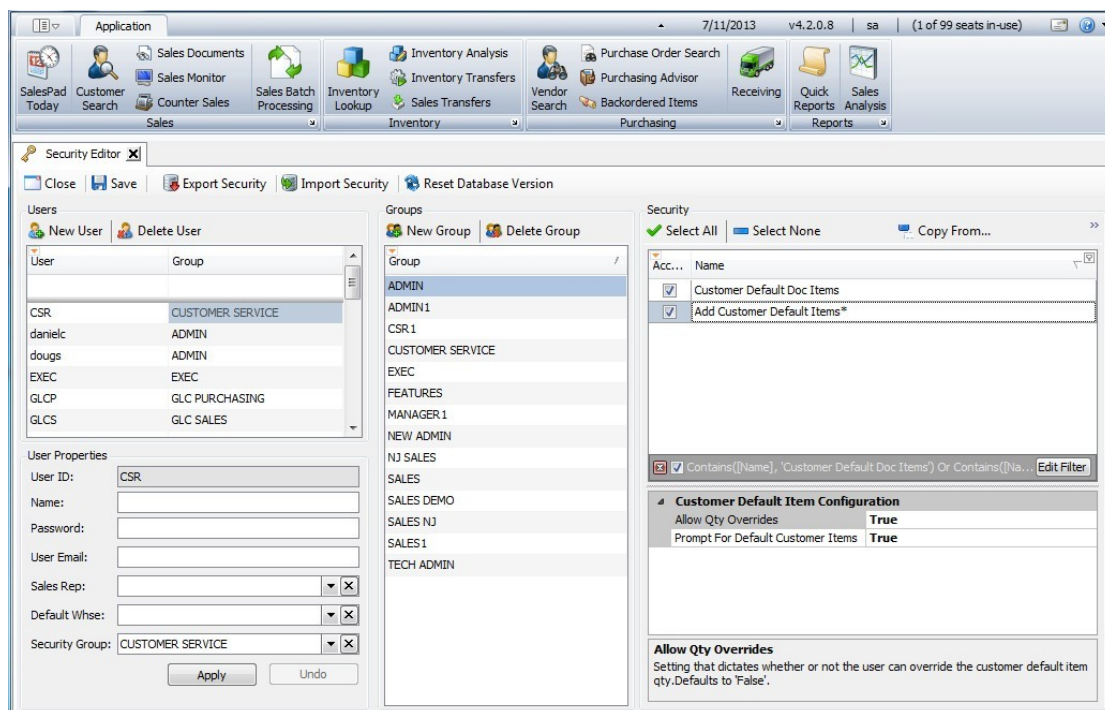
Megan De Freitas - 2024-11-22 - [Sales](#)

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.

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

SalesPad Customer Search Sales Sales Batch Processing Inventory Inventory Analysis Inventory Transfers Purchasing Vendor Search Purchasing Advisor Backordered Items Receiving Quick Reports Sales Analysis

Customer Search Card: [AARONFIT0001] Aaron Fitz Electrical

Close Refresh Save Dynamics GP Quote DISTRIBUTION ORDER Invoice Return

Customer Properties
 Customer: AARONFIT0001
 Customer Name: Aaron Fitz Electrical
 Cust Class: USA-ILMO-T1
 Price Level: RETAIL
 Pay Terms: NET 30
 Sales Rep: Marsh, Ian

Primary Address Information
 Tom Jones
 222 Warehouse Drive
 Redmond, WA 98052-61
 P1:(425) 567-9876
 P2:(425) 657-4344
 P3:(425) 336-7876
 ti@afe.com
 www.afe.com

Open Sales Documents

Type	Doc#	Doc Date	Batch	PO	Total	Req Ship
ORDER	D5103	10/27/2...	WAITIN...		15.50	10/27/2010
QUOTE	Q5118	11/11/2...	PENDIN...		1,612.08	11/11/2010
ORDER	D5114.1	11/11/2...	READY T...	AA1212	1,038.00	11/11/2010
QUOTE	Q5125	11/24/2...	PENDIN...		112.34	11/24/2010
ORDER	D5140.1	12/13/2...	READY T...		471.50	12/13/2010
ORDER	D5141	12/13/2...	WAITIN...		150.00	12/13/2010

Default Shipping Information
 Method FEDEX GROUND Whse: WAREHOUSE

Contact Addresses CRM Note A/R Item History Sales Documents Credit Cards User Fields Sales Graph Quick Report Recurring Sales Item Sales Special Pricing Default Doc Items Email Audit

Add Item Remove Item

Item Number	Item Description	Qty	UOM
100XLG	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.

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SalesPad Customer Search Sales Sales Batch Processing Inventory Inventory Analysis Inventory Transfers Purchasing Vendor Search Purchasing Advisor Backordered Items Receiving Quick Reports Sales Analysis

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

Close Save Print Configure Actions...

Document Properties
 Document #:
 Customer #: AARONFIT0001
 Cust PO:
 Req Ship: 7/11/2013
 Ship Method: FEDEX GROUND
 Whse: WAREHOUSE
 Currency: Z-US\$

Line Items Notes Addresses Hold

New Delete Insert

Item

Tasks
 Sales Line Excel Import
 Fulfillment
 Shipping Weight: 0
 Sales Document Split
 Related Purchases
 Profitability
 RB Not loaded
 RB Fulfillment Options
 Payments
 Sales Document Manual Split
 Blanket Order Release
 Blanket Order Invoicing
 Sales Document Recurring Definition
 Commit Catch Weights
 Sales Document Convert To BOM
 Smart Printing
 Purchase Order Generation
 Attach Sales Line to PO
 Auto Item Conversion
 Document Release
 Aggregate Pricing
 Add Customer Default Items

Additional Properties
 Batch/Q: PENDING ORDER
 Price Level: RETAIL
 Discounts: No Holds

Totals - GM: [\$0.00] [0.00%]
 Misc Charge: 0.00
 Discounts: 0.00
 Freight: 0.00
 Tax: 0.00
 Total: 0.00
 Payment: 0.00

Quick Report Trading Numbers FedEx Quote

Code	UOM	Price	Cost	Ext Price	Req Ship	Qty BO	Comment

0.00

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)

Close Save Print Delete Copy Allocate Un Allocate Dynamics GP Release

Document Properties

Document #: ORDER (DISTRIBUTION)

Customer #: AARONFIT0001 Aaron Fitz Electrical

Cust PO: Sales Rep: IAN M.

Req Ship: 7/11/2013 Pay Terms: NET 30

Ship Method: FEDEX GROUND Doc Date: 7/11/2011

Whse: WAREHOUSE Created By: sa

Currency: Z-US\$ 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: No Holds

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