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Customer Default Items Manual Line Select

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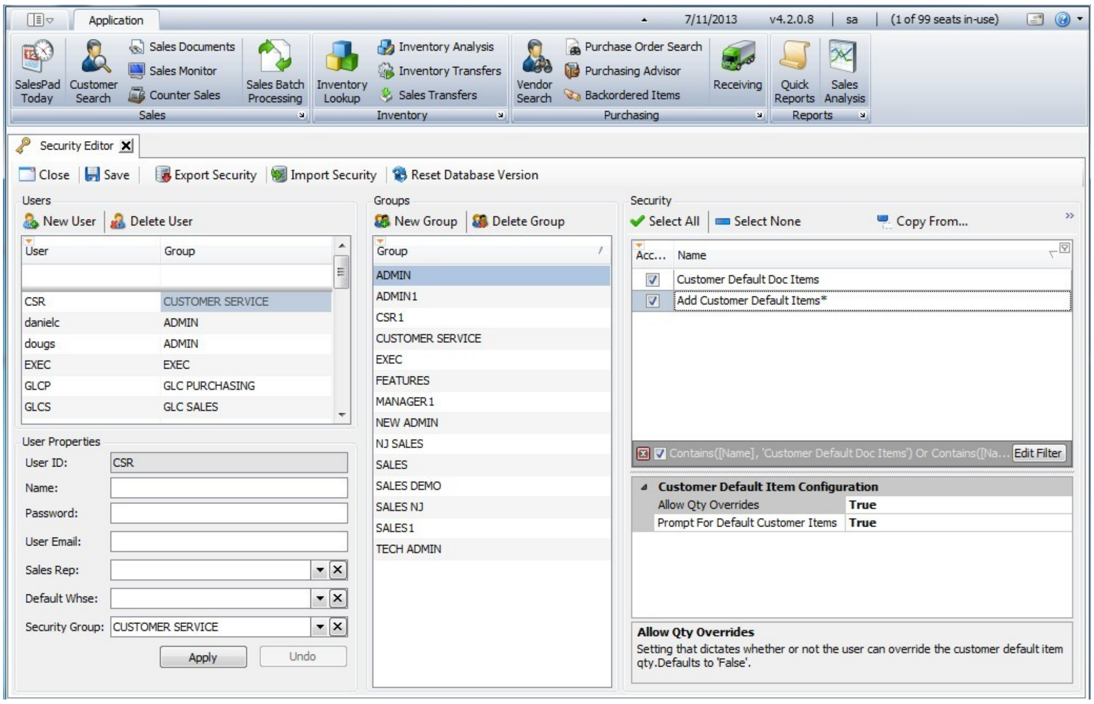
Overview

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.

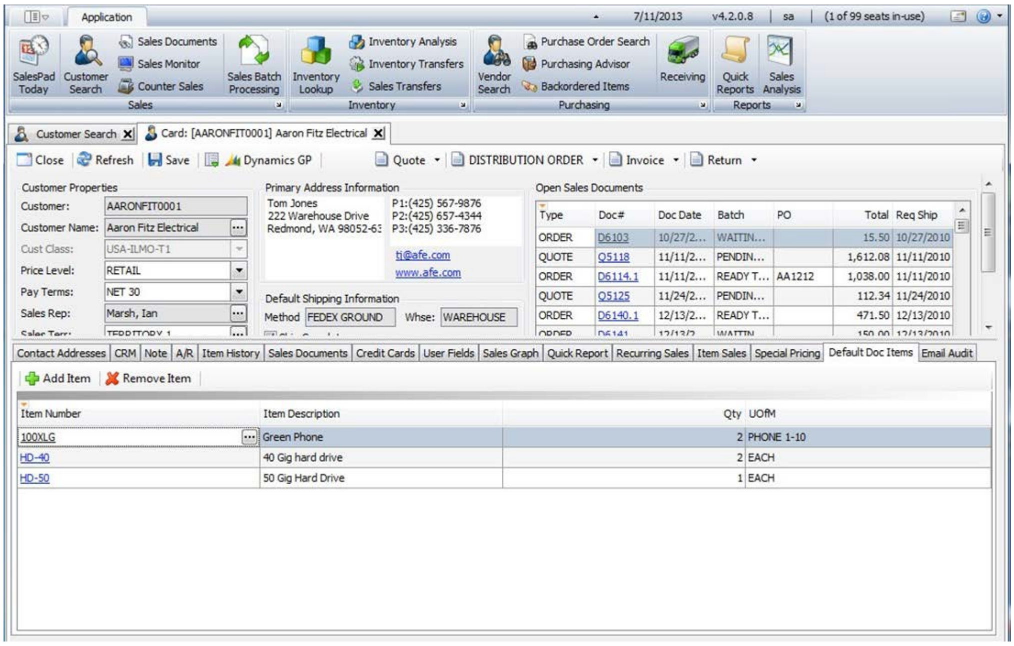
Security

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.



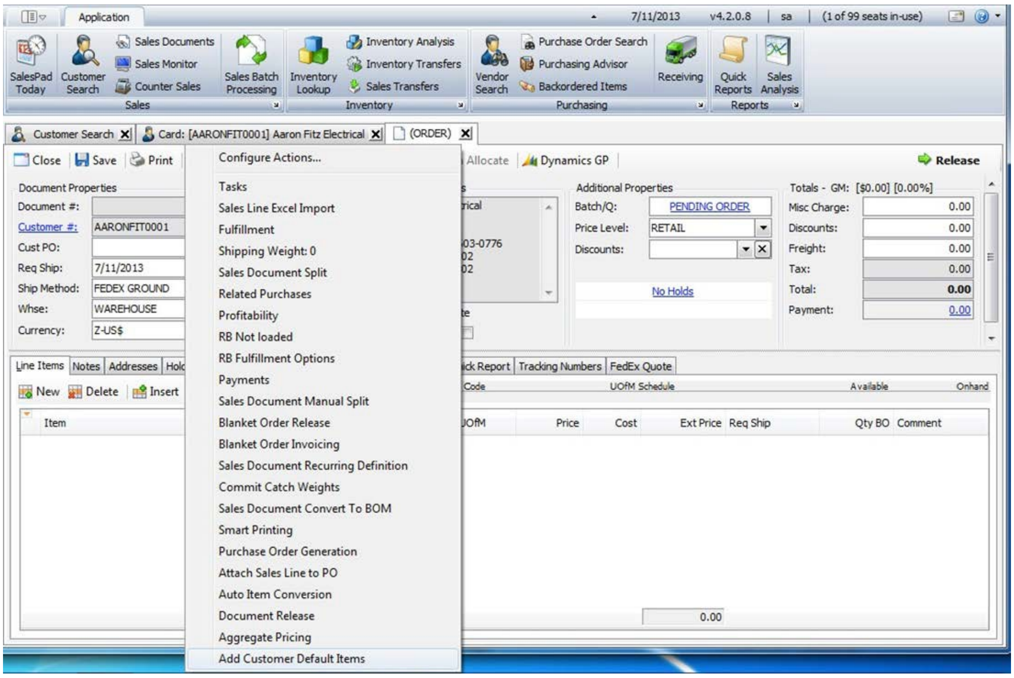
Usage

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.

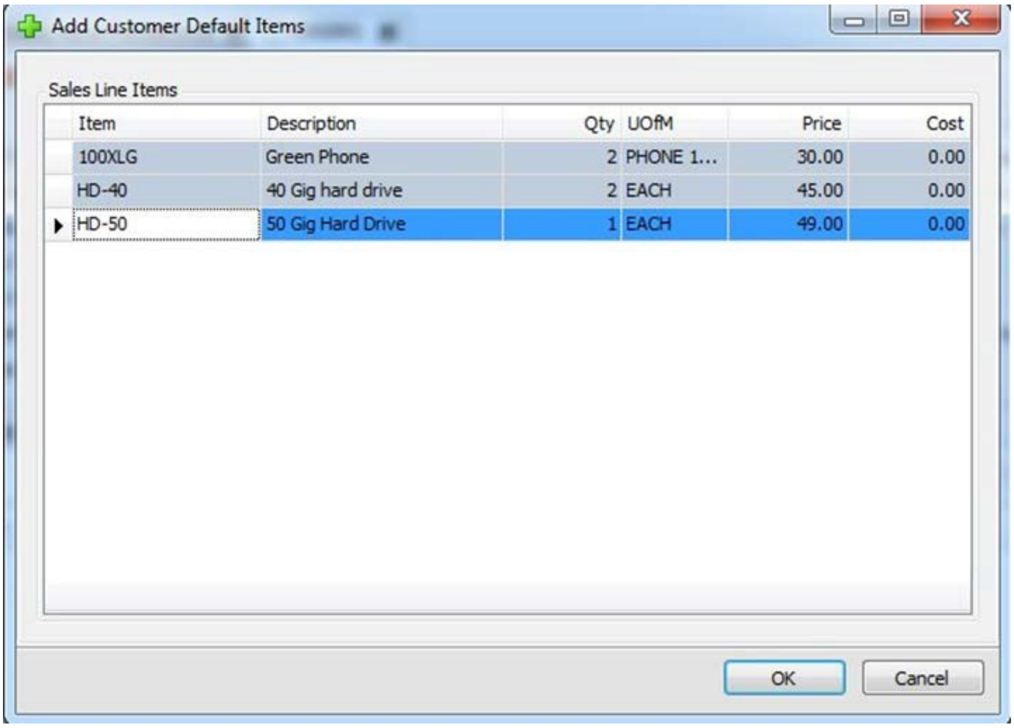


Now when you create a new sales document, you can select which items to default on the form.

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.



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



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