



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.

The screenshot shows the Security Editor application interface. The window title is "Security Editor" and it displays various tabs: "Users", "Groups", and "Security". The "Security" tab is active, showing a list of items with checkboxes. The "Customer Default Item Configuration" section is expanded, showing "Allow Qty Overrides" set to "True" and "Prompt For Default Customer Items" set to "True".

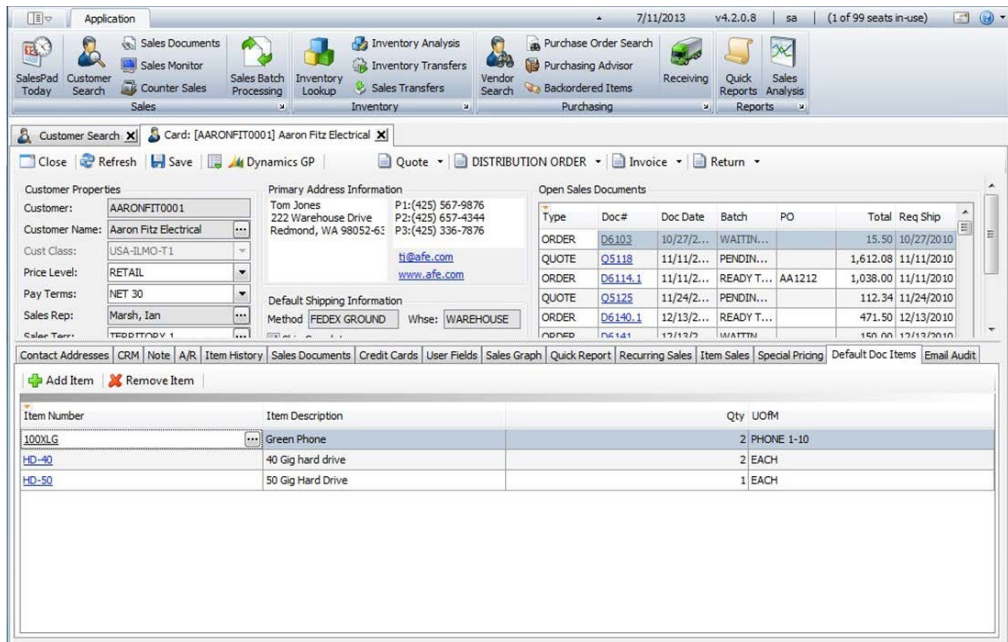
Acc...	Name
<input checked="" type="checkbox"/>	Customer Default Doc Items
<input checked="" type="checkbox"/>	Add Customer Default Items*

Customer Default Item Configuration	
Allow Qty Overrides	True
Prompt For Default Customer Items	True

Usage

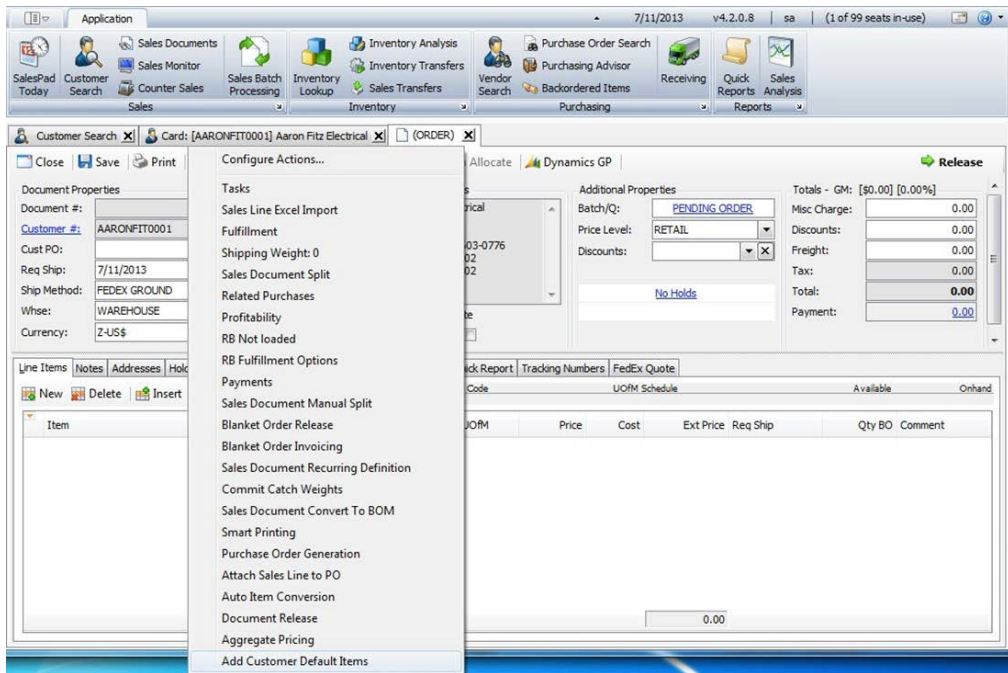
1. Open the Customer Card you want to use and click on the "Default Doc Items" Tab.

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.

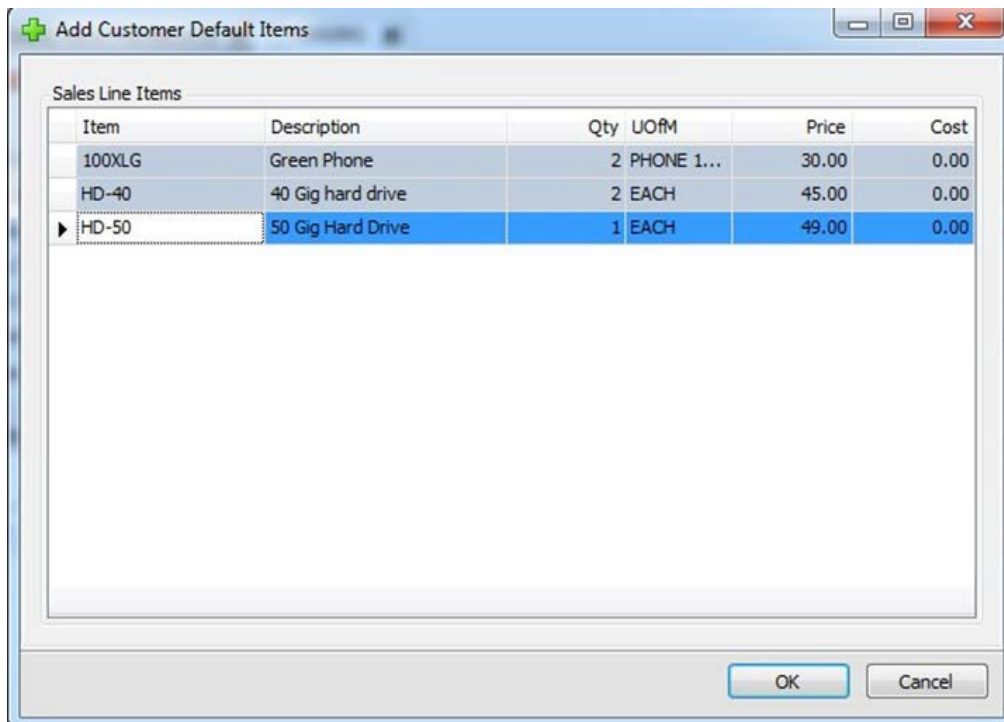


Now when you create a new sales document, you can select which items to default on the form.

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.

