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Customer Items

Cavallo Support - 2026-04-06 - [Sales](#)

Overview

Sales Inventory Lookup (Inventory Lookup screen accessed from a sales document) has a tab where Customer Items can be viewed and selected. A Customer Item, which is set up in Dynamics GP under Customer Item Maintenance, is an alias or alternate item number for a standard inventory item.

Viewing Customer Items

To view Customer Items, open a sales document and click the ellipsis (...) next to a line item.

Make sure Search Customer Items is checked, and perform the search. By default, all customer items will display under the Customer Items tab.

Sales Inventory Lookup

Search | Clear

Item Search

Search Criteria

Item: RAM SET

Description: Warehouse: WAREHOUSE

Item Class:

Search Options

Match Beginning Show Inactive

Search Customer Items Search Vendor Items

Search Alternate Items Search Prev. Purchased

Inventory Items (0 items found) | **Customer Items (1 items found)** | Vendor Items (0 items found)

Item Number	Customer Num	Customer Item Num	Customer Item Description
128 SDRAM	ADAMPARK0001	RAM SET	

.....

Inventory | Properties | Sales | Purchases | Notes | Serial/Lot Numbers | Analysis | Quick Report | User Fields | Item Substit

Basic Info

Item Number: 128 SDRAM

Description: [OBS] 128 meg SDRAM

Short Description: RAM

Quantities

On Hand: 59

On Order: 1,003

Allocated: 2,371

Pricing

UoM Schedule: PHoNE

Item Tracking: None

Current Cost: None

Add As Sample

OK Cancel

Viewing Only the Current Customer's Items

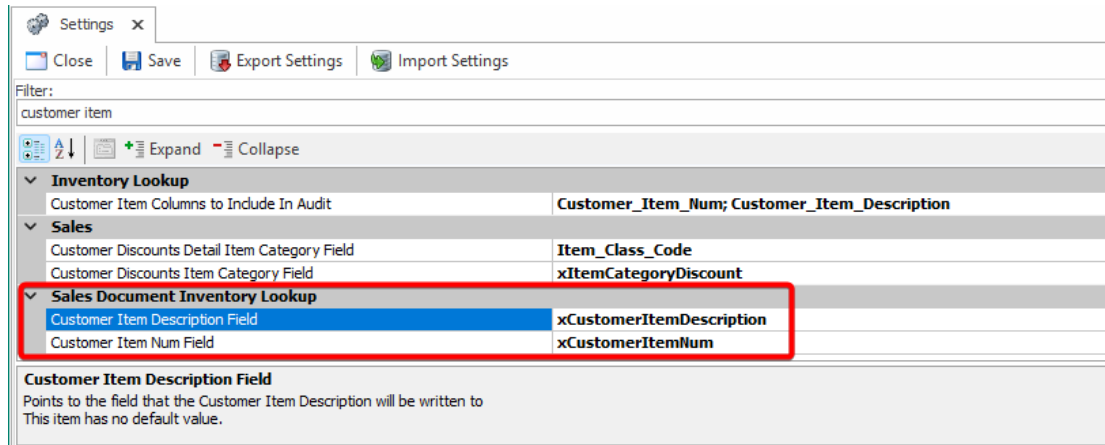
To set up the customer items tab to display only the *current* customer's items, go to the Security Editor, select *Sales Inventory Lookup*, and set *Show Customer Items Only* to True.

Storing Customer Item Numbers and Customer Item

Descriptions

Customer Item Numbers and Customer Item Descriptions can be written to user defined fields in SalesPad. To do so:

1. In the User Field Editor, create two text user defined fields on the sales line item, one to hold the Customer Item Description and one to hold the Customer Item Number (for example, xCustomerItemDescription and xCustomerItemNum). Refer to [User Defined Fields](#) document for more information on creating user defined fields
2. In the Settings module, specify the name of the new user fields in the *Customer Item Description Field* setting and the *Customer Item Num Field* setting
3. Customer Item Descriptions and Customer Item Numbers will now be pulled into the specified fields to be displayed on the sales line



Printing Customer Items

To have customer items printed on sales document printed reports, the spcpSalesDocumentReport SQL stored procedure must be modified. Contact your Account Manager to discuss creating this procedure.