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Customer Items

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

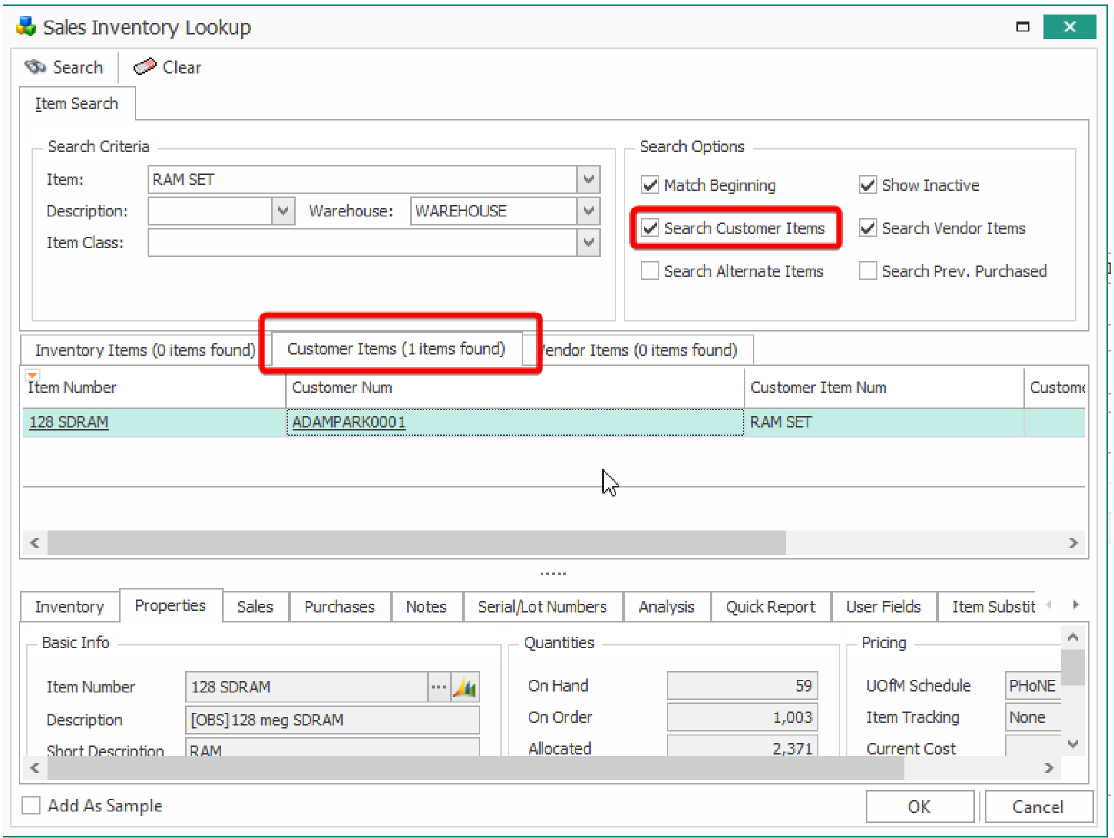
Overview

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.



Viewing Only the Current Customer’s Items

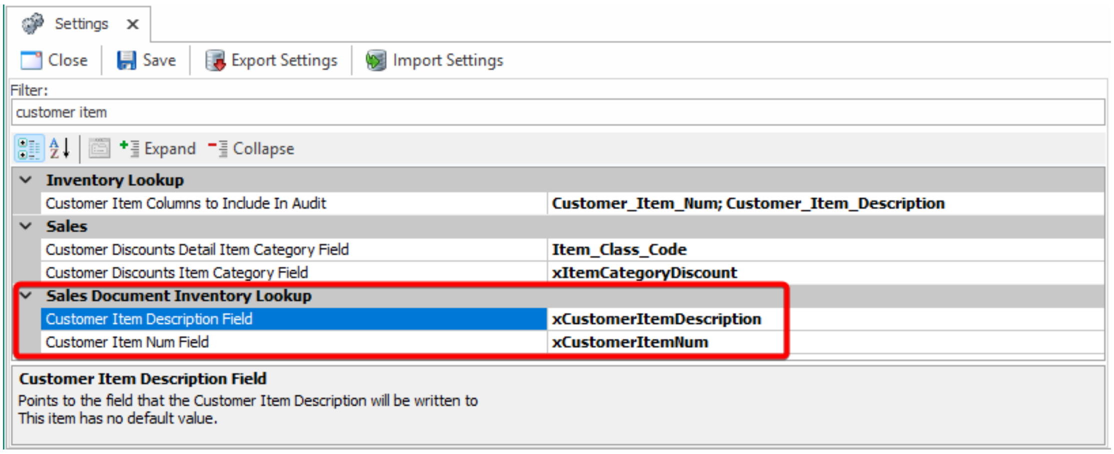
To set up the customer items tab to display only the *current* customer’s items, go to the Security Editor, select *Sales Inventory Lookup*, and set *Show Customer Items Only* to True.

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.