



Customer One Time Items

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Overview

Customer One Time Items functionality allows users to select items from a customer's Item History tab to be remembered and automatically added to only the next new sales document for that customer.

Setup

There is no additional security to add One Time items, however, security to access customer cards and the Item History tab (including Customer Item History) and Sales Document Entry must be enabled.

Use

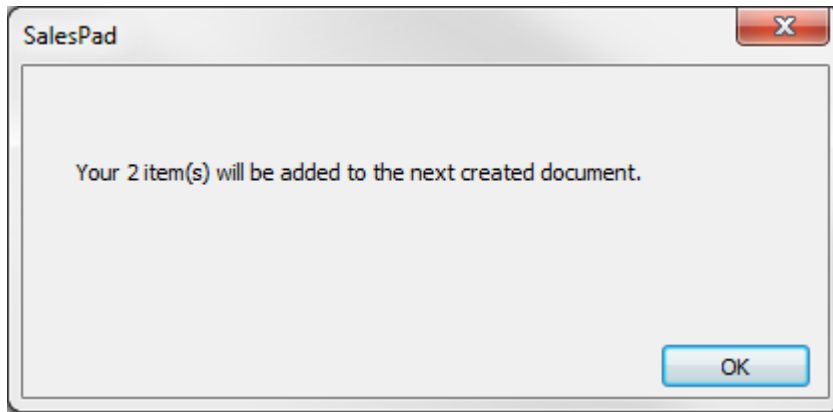
1. Select a customer and open the Customer Card
2. Open the Item History tab

Contact Addresses	CRM	Note	A/R	Item History	Sales Documents	Credit Cards	User Fields	Sales Graph
Months to Show:	6		Add One Time Items		Add Default Items		Refresh	Doc Type
Item Number	Item Description			Quantity				
100XLG	Green Phone			1				
128 SDRAM	128 meg SDRAM			3				
100XLG	Green Phone			1				
100XLG	Green Phone			1				
A100	Audio Svstem			1				

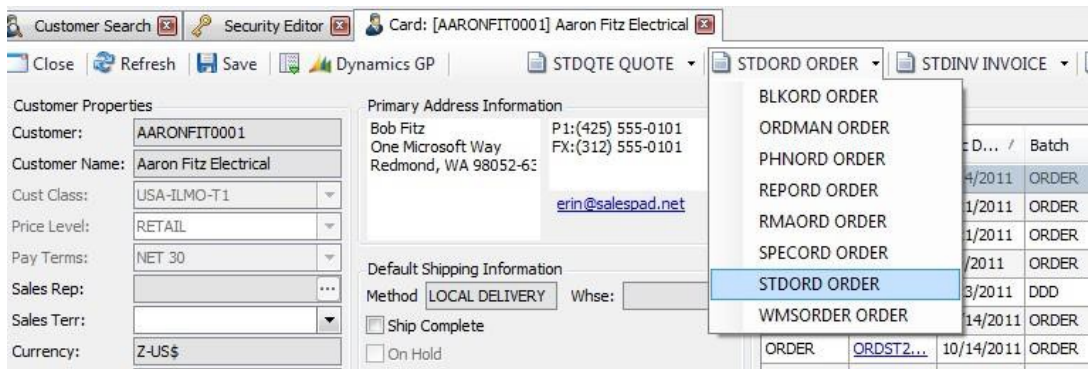
3. Select the item(s) to be added to the customer's next sales document (CTRL+Click or Shift+Click to select multiple items)

CRM	Note	A/R	Item History	Sales Documents	Credit Cards	User Fields	Sales Graph	Extended I
Months to Show:	6		Add One Time Items		Add Default Items		Refresh	Doc
Item Number	Item Description			Quantity	Unit Price	Doc		
100XLG	Green Phone			1	59.95	12/		
128 SDRAM	128 meg SDRAM			3	135.20	12/		
100XLG	Green Phone			1	39.95	1/1/		
100XLG	Green Phone			1	39.95	1/1/		
A100	Audio System			1	39.95	4/2/		
WIRE-SCD-0001	Single conductor wire			9	0.35	5/2/		
A100	Audio System			222	39.95	5/2/		

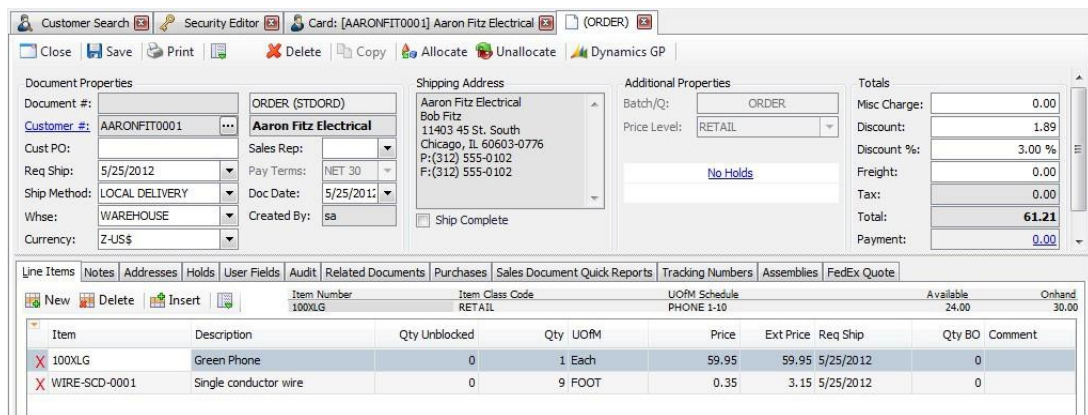
4. Click **Add One Time Items**
5. A confirmation message will appear. Click **OK**



6. Create a new sales document for the customer by selecting the document type from the customer card header



The new sales document will open and the selected line items will appear on the document:



Note: This process adds the selected items once, only to the customer's next sales document. To add default items to every document for a particular customer, refer to [Customer Default Items](#).