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Customer One Time Items

Cavallo Support - 2026-04-09 - [Sales](#)

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. Items selected to be One Time Items will be forgotten if that customer card is closed.

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](#).

Setup

There is no additional security to add One Time Items to the customer card's Item History tab. You may ensure that you have access to the Item History Tab by enabling the following security setting.

Security: *Customer Item History*

Use

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

The screenshot shows the 'Customer Card' for 'AARONFIT0001 Aaron Fitz 3'. The 'Item History' tab is active, displaying a table of items. The 'Customer Item History' table has the following data:

Item Number	Item Descrip...	Quantity	Unit Of Mea...	Unit Price	Doc Date	Sales Doc Ty...	Sales Doc Num	Source	Customer P...	Sales Batch
256 SDRAM	256 meg SD...	1	Each	229.95	4/12/2027	FULFILLMEN...	FULORD1000	Open		FULORD
BK MOUSE	Black Mouse	2	Each	19.95	4/12/2027	FULFILLMEN...	FULORD1003	Open		FULORD
CAP100	Capacitor	1	Each	9.95	4/12/2027	FULFILLMEN...	FULORD1003	Open		FULORD
HDWR-LDS...	Network LDS...	1	Each	5,409.95	4/12/2027	FULFILLMEN...	FULORD1006	Open		FULORD
KB104	Keyboard	2	Each	19.95	4/12/2027	FULFILLMEN...	FULORD1006	Open		FULORD
PHON-BAS-0...	Phone Base	2	Each	29.95	4/12/2027	FULFILLMEN...	FULORD1008	Open		FULORD
PHON-FGD...	Phones-Han...	1	Each	119.95	4/12/2027	FULFILLMEN...	FULORD1008	Open		FULORD
128 SDRAM	[OBS] 128 m...	1	EACH	5.00	3/5/2026	QUOTE	QTEST1076	Open		MAIN
128 SDRAM	[OBS] 128 m...	1	EACH	5.00	3/6/2026	QUOTE	QTEST1077	Open		MAIN

3. Select the item(s) to be added to the customer's next sales document
 1. SHIFT + Click: Select a group of items. This highlights all item from your previously selected row to your shift clicked row.
 2. CTRL + Click: Multi-select. This highlights a new row in addition to anything currently highlighted.

Customer: [AARONFIT0001] Aaron Fitz 3

Close Refresh Save Print Dynamics GP Quote STDORD ORDER Invoice

Customer: AARONFIT
Customer Name: Aaro...
Short Name:
Cust Class:
Price Level:
Pay Terms: N...
Sales Rep: Jens...

new customer

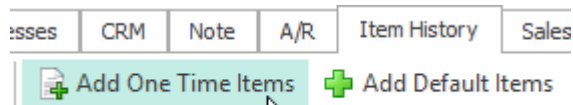
Type	Doc#	Doc Date	Batch	PO	Total	Req Ship
INVOICE	STDINV37...	12/30/2025	NEW INV...		-40.00	12/30/2025
FULFILLM...	FULORD1...	4/12/2027	FULORD		358.25	4/12/2027
FULFILLM...	FULORD1...	4/12/2027	FULORD		49.85	4/12/2027
FULFILLM...	FULORD1...	4/12/2027	FULORD		5,828.55	4/12/2027
FULFILLM...	FULORD1...	4/12/2027	FULORD		192.45	4/12/2027
INVOICE	STDINV22...	4/12/2027	SOP INVO...		481.3395	4/12/2027

Contact Addresses CRM Note A/R Item History Sales Documents Credit Cards PayFabric Transactions PayFabric Wallet User Fields Sale

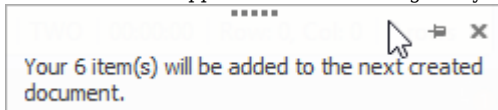
Refresh Add One Time Items Add Default Items Months To Show: 12 Include: Quotes Orders Invoices Returns

Item Number	Item Descrip...	Quantity	Unit Of Mea...	Unit Price	Doc Date	Sales Doc Ty...	Sales Doc Num	Source	Customer P...	Sales Batch
256 SDRAM	256 meg SD...	1	Each	229.95	4/12/2027	FULFILLMEN...	FULORD1000	Open	FULORD	
BK MOUSE	Black Mouse	2	Each	19.95	4/12/2027	FULFILLMEN...	FULORD1003	Open	FULORD	
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HDWR-LDS-	Network LDS...	1	Each	5,409.95	4/12/2027	FULFILLMEN...	FULORD1006	Open	FULORD	
KB 104	Keyboard	2	Each	19.95	4/12/2027	FULFILLMEN...	FULORD1006	Open	FULORD	
PHON-BAS-0	Phone Base	2	Each	29.95	4/12/2027	FULFILLMEN...	FULORD1008	Open	FULORD	
PHON-FGD-	Phones-Han...	1	Each	119.95	4/12/2027	FULFILLMEN...	FULORD1008	Open	FULORD	
128 SDRAM	[OBS] 128 m...	1	EACH	5.00	3/5/2026	QUOTE	QTEST1076	Open	MAIN	
128 SDRAM	[OBS] 128 m...	1	EACH	5.00	3/6/2026	QUOTE	QTEST1077	Open	MAIN	

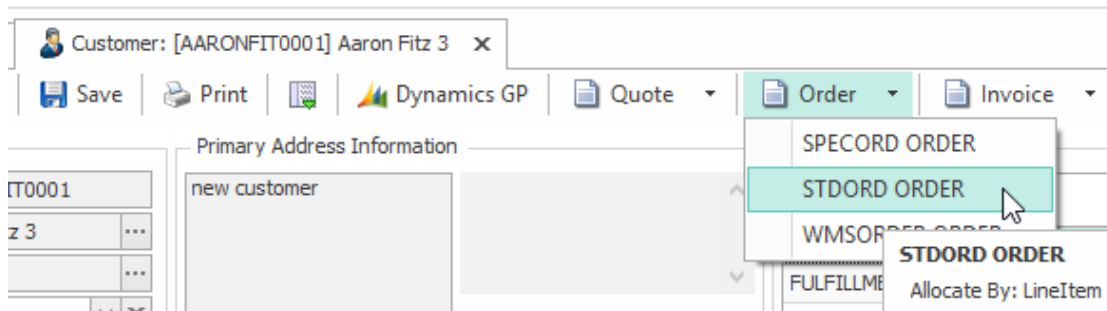
4. Click **Add One Time Items**



5. A notification will appear on the bottom right of your screen



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:

Customer Search x Customer: [AARONFIT0001] Aaron Fitz 3 x (ORDER) x

Close Save Print Fulfillment Delete Copy Allocate Unallocate Dynamics GP Z-US\$

Document Properties

Document #: ORDER (STDORD)

Customer #: AARONF Aaron Fitz 3

Cust PO: Sales Rep: PA...

Req Ship: 4/9/2 Sales Terr: NE...

Ship Method: Pay Terms: NE...

Whse: 01-N Doc Date: 4/9/2

Currency: Z-U... Created By: jacob.be

Shipping Address

Alt Company Name
new customer
Canada

Ship Complete

Additional Properties

Batch/Q: NEW ORDER

Price Level: RETAIL

Discounts:

[1 Hold: APPROVAL](#)

Totals

Misc Charge: 0

Discount: 0

Discount %: 0.0

Freight: 0

Tax: 0

Total: 5,539.85

Payment:

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report FedEx Quote Email Audit Assemblies Trad

New Delete Insert Sales Line Resources Sales Line Promotions Configurator

Item Number	Item Class Code	UOM	Schedule	Available	Onhand
CAP100		PHONE 1-10		0.00	0.00

Item	Description	Qty	UOM	Price	Ext Price	Req Ship	Qty BO	Comment
CAP100	Capacitor	1	Each	9.95	9.95	4/9/2026	0	
HDWR-LDS-0001	Network LDS/Card	1	Each	5,409.95	5,409.95	4/9/2026	0	
PHON-FGD-0001	Phones-Hands Free Dual Ear	1	Each	119.95	119.95	4/9/2026	0	

5,539.85