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.

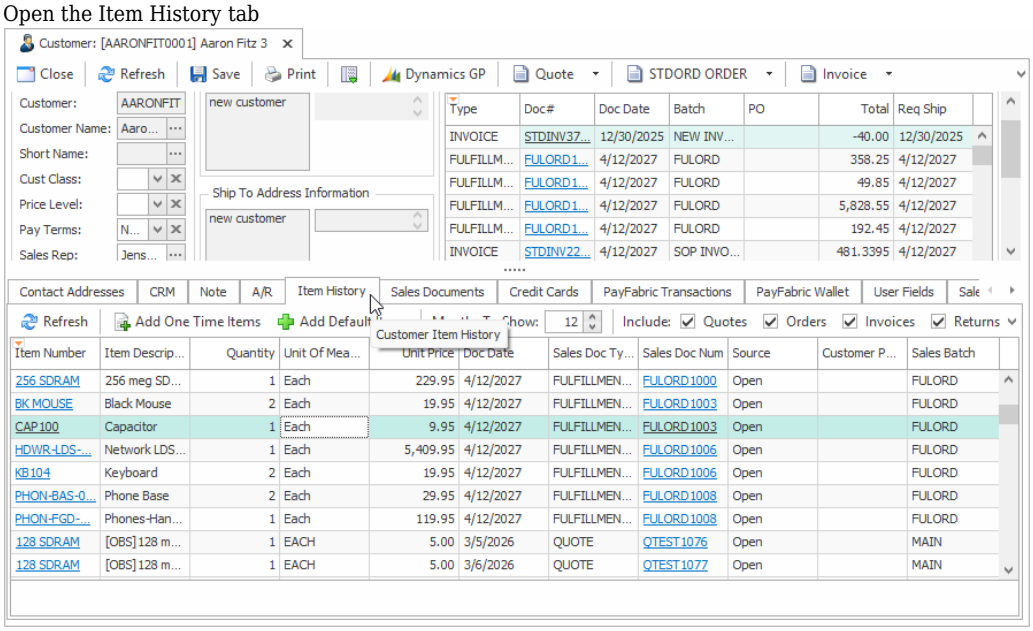
Setup

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.

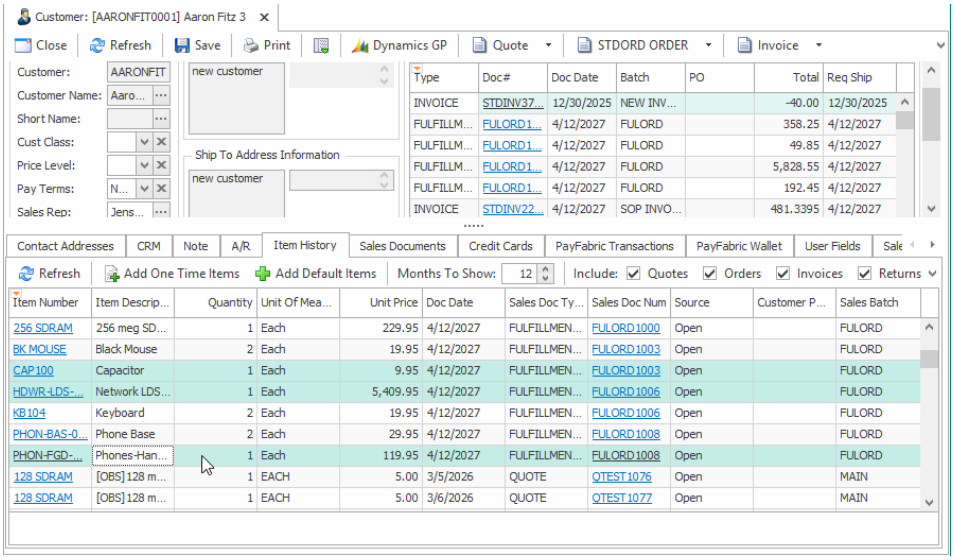
Security: *Customer Item History*

Use

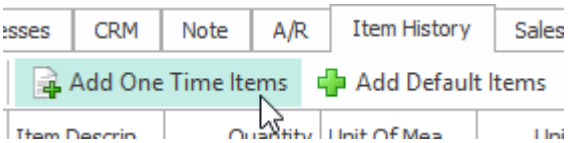
1. Select a customer and open the Customer Card
2. Open the Item History tab



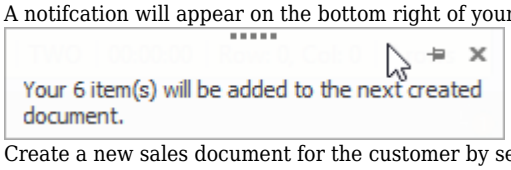
3. Select the item(s) to be added to the customer's next sales document
    1. SHIFT + Click: Select a group of items. This highlights all item from your previously selected row to your shift clicked row.
    2. CTRL + Click: Multi-select. This highlights a new row in addition to anything currently highlighted.



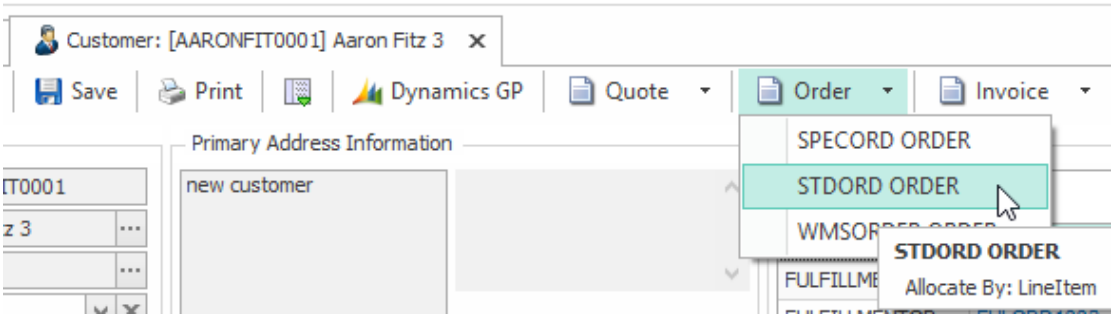
4. Click **Add One Time Items**



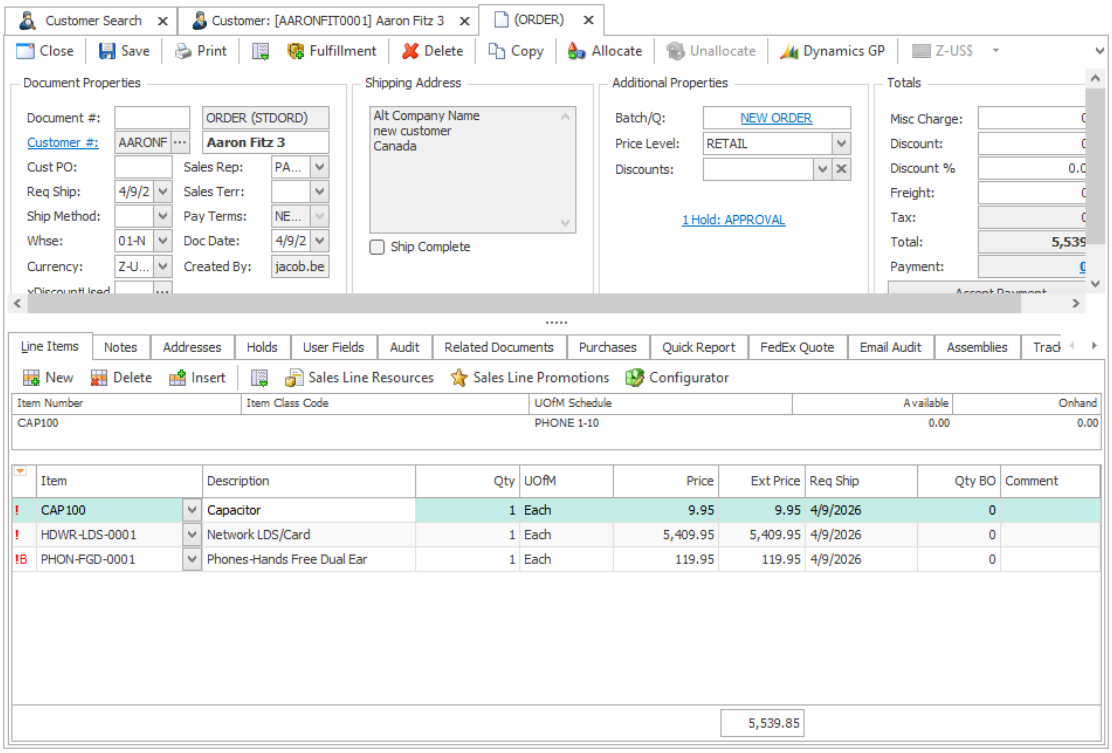
5. A notifcation will appear on the bottom right of your screen



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
Customer: [AARONFIT0001] Aaron Fitz 3
(ORDER)
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:
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:
Discount:
Discount %
Freight:
Tax:
Total:
5,539
Payment:
Line Items
Notes
Addresses
Holds
User Fields
Audit
Related Documents
Purchases
Quick Report
FedEx Quote
Email Audit
Assemblies
New
Delete
Insert
Sales Line Resources
Sales Line Promotions
Configurator
Item Number
Item Class Code
UOfM Schedule
Available
Onhand
CAP100
PHONE 1-10
0.00
0.00
Item
Description
Qty
UOfM
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