



Item Maintenance

Cavallo Support - 2026-01-14 - [Inventory](#)

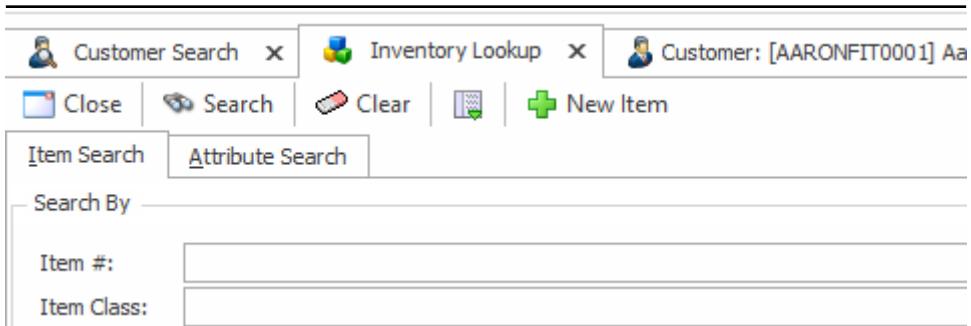
Overview

The Item Maintenance screen allows users to view and modify the information for existing items, as well as create new items. This screen can be accessed from the main Inventory Lookup or from within the sales document line item lookup.

Creating a New Item

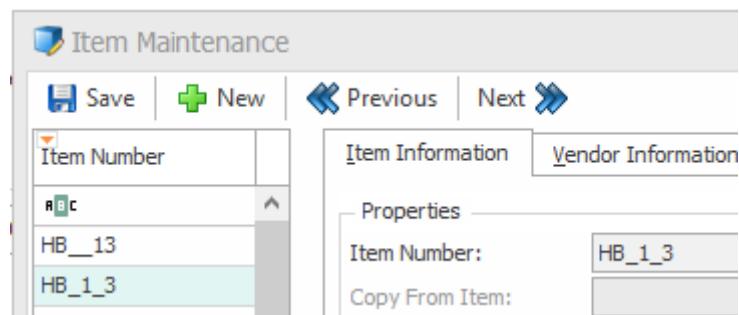
From Inventory Lookup

Open Inventory Lookup and click the New Item button. The Item Maintenance screen appears. Skip to the Item Maintenance section of this document to continue.



From Item Maintenance (5.6.10+)

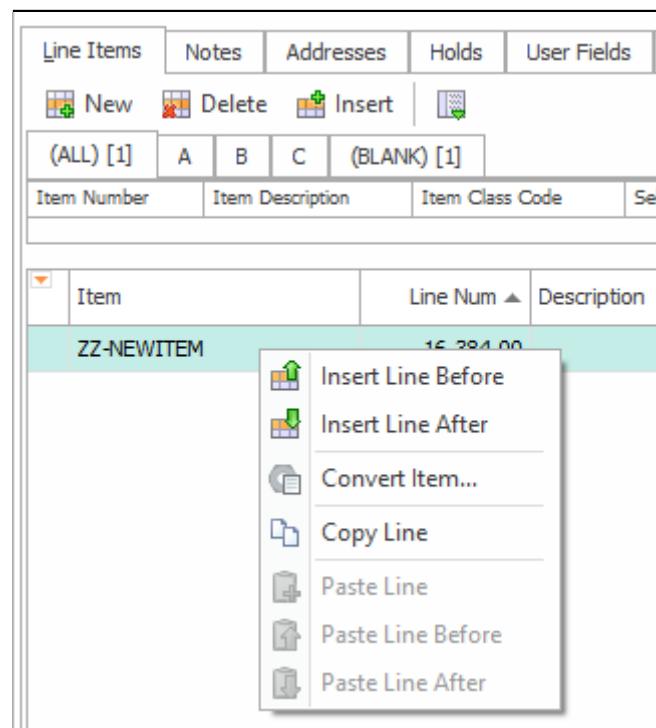
There is a New button that can be used to create items directly within the maintenance screen.



Skip to the Item Maintenance section to continue.

From a Sales Document

Open a sales document with a non-inventory item or add a new non-inventory item to a sales document. Right-click on the non-inventory item and select Convert Item.



The Item Maintenance screen appears. Continue to the Item Maintenance Section below.

Item Maintenance

Enter the new item information in the Item Information tab (see the [SalesPad User Defined Fields](#) document for information on adding item

UDFs).

The screenshot shows the 'Item Maintenance' window with the 'Item Information' tab selected. The left sidebar lists item numbers. The main area contains fields for Item Number, Item Description, and various pricing and shipping details. The 'Vendor Information' tab shows a table of vendor details, including Vendor ID, Vendor Name, and Vend Item Number.

Vendor ID	Vendor Name	Vend Item Number	Vend Item Descr	Min Order Qty	xText	Max Order Qty	Economic Order Qty	Requisitions
ACETRAVE0001	A Travel Comp...	ACD_HB_1_3	Audio System	10	ACE HB X1	1,000	500	0
BUSINESS MAG	Business Maga...	BUS_HB_1_3	Audio System	5	BUS MAG1	50	5	0

Note: Use the Copy From Item field to enter an existing item number from which to copy item information. You can also use the ellipsis (...) button to open a new Inventory Lookup to find an item for copying. This field is accessible for new items only.

If the item needs vendor-specific details set up, select the Vendor Information tab and click the New button. Select the Vendor ID for the item vendor, and then specify the Vendor Item Number and any other necessary fields.

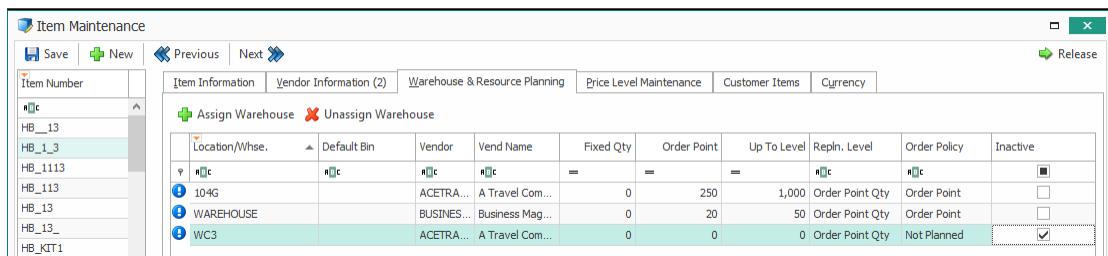
The screenshot shows the 'Item Maintenance' window with the 'Customer Items' tab selected. The table lists vendor details, including Vendor ID, Vendor Name, and Vend Item Number.

Vendor ID	Vendor Name	Vend Item Number	Vend Item Descr	Min Order Qty	xText	Max Order Qty	Economic Order Qty	Requisitions
ACETRAVE0001	A Travel Comp...	ACD_HB_1_3	Audio System	10	ACE HB X1	1,000	500	0
BUSINESS MAG	Business Maga...	BUS_HB_1_3	Audio System	5	BUS MAG1	50	5	0

To assign custom item numbers for customers who purchase this item, select the Customer Items tab and click the New button. Select the Item

Number and Customer Number, then assign a Customer Item Number and any other necessary fields.

Items must be assigned to warehouses in order to have inventory tracked in the system. Select the Warehouse & Resource Planning tab and assign the item to one or more warehouses. Each warehouse can be assigned defaults for vendor and replenishment planning. Items can only be unassigned from warehouses if the assignment has not been saved.

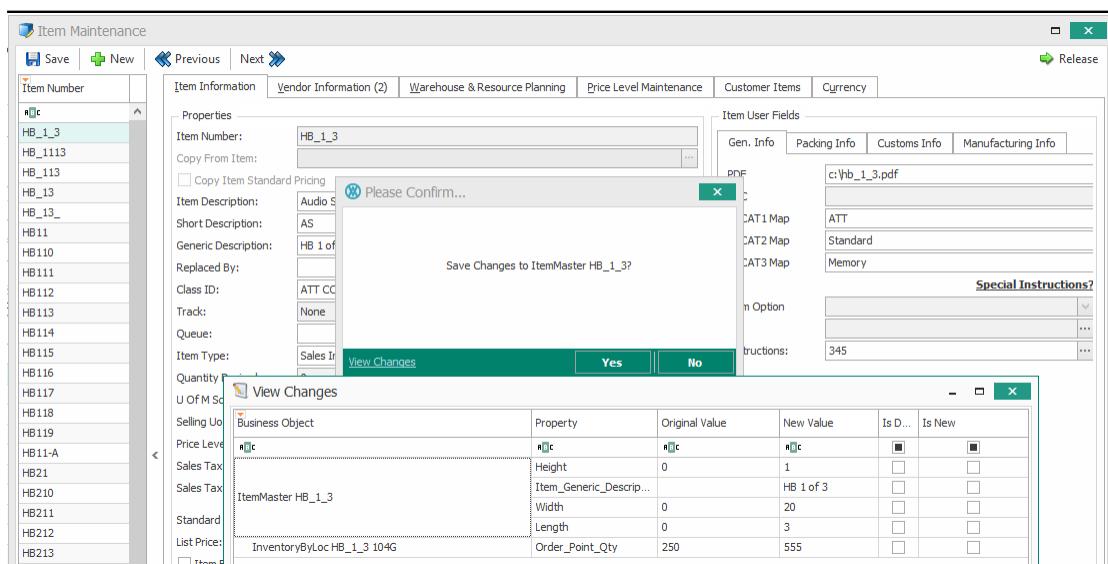


For SalesPad versions prior to 5.6.10, click the OK button at the lower right to create the new item and save it to the database. If you are creating a new item from a sales document, you will be prompted for whether to update the sales line's unit price with the list price defined for that item.

Save Changes (5.6.10+)

In SalesPad versions 5.6.10 and newer, there is now a Save button, and the OK button is renamed to “Save & Close”. There are now better prompts to save due to the new Item Navigation feature added (see section below).

The prompt will now show pending changes.



Editing an Existing Item

To edit an existing item in SalesPad, access the Item Maintenance screen from Inventory Lookup or from the Sales Inventory Lookup. Navigate to the Properties Tab and click the ellipsis button from the Item Number field.

The screenshot shows the Sales Inventory Lookup interface. At the top, there are search criteria fields: Item (HB_1), Description, and Warehouse (WAREHOUSE). The search results table shows 43 items found, with the first item, HB110, selected. The selected item details are shown in the Properties tab at the bottom, including Item Number (HB110), Description (Audio System), and Item Class (ATT CORD). The Properties tab also includes sections for Basic Info, Sales, Purchases, Notes, Returns Tracker History, Serial/Lot Numbers, Analysis, Item Quick Report, User Fields, and Item Subs.

Item Number	Description	UoFM Sch...	Avail	Onhand	Item Class
HB110	Audio System	PHONE 1...	109,738.00	110,000.00	ATT CORD
HB111	Audio System	PHONE 1...	5,469.00	6,970.00	ATT CORD
HB112	Audio System	PHONE 1...	4,782.00	6,000.00	ATT CORD
HB113	Audio System2 som...	PHONE 1...	559.00	787.00	ATT CORD
HB116	Audio System	PHONE 1...	11.00	11.00	ATT CORD
HB91	Audio System	PHONE 1...	0.00	0.00	ATT CORD

From a Sales Document

Open a sales document and click the New button on the Line Items tab. Enter the item number of the item you wish to edit, then right-click on the line item and click Convert Item.

From Inventory Lookup

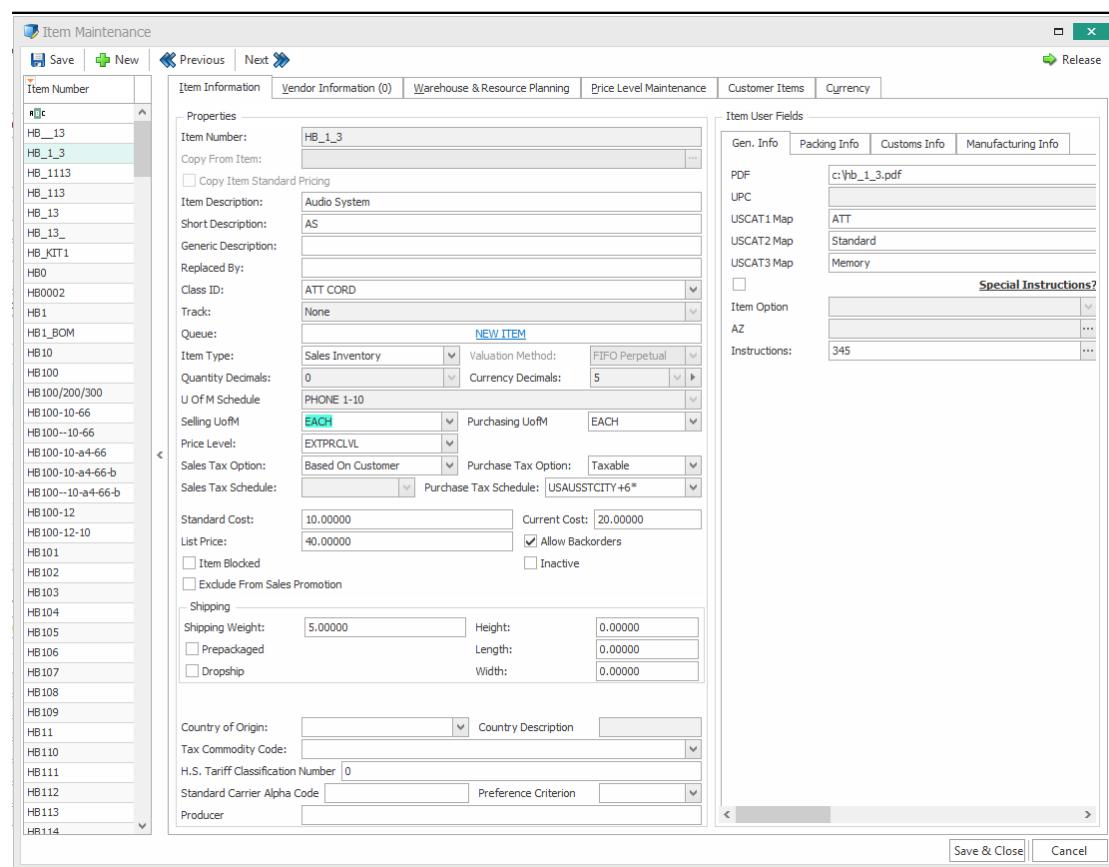
Navigate to Modules > Inventory Lookup, perform an inventory search, and select the item you wish to work with. In the bottom portion of the SalesPad window, select the Item Properties tab. Click the ellipsis (...) button to the right of the Item Number field to open the Item Maintenance screen.

Alternatively, you can use the New Item button and enter the item number to make changes to existing item information.

Make any needed changes on the Item Maintenance screen and then click Save or Save & Close to update.

Item Navigation (5.6.10+)

In SalesPad versions 5.6.10 and newer, the Item Maintenance screen shows a grid of items that mirror the results from the Inventory Lookup or the Sales Inventory Lookup. You can now select different items from the grid, or use the Previous and Next buttons to navigate through the list. Upon exiting the screen, the selected item will also be selected in the corresponding Inventory Lookup grid. There is also a splitter that can be collapsed to hide the new grid if desired.



The screenshot shows the 'Item Maintenance' window. On the left, there is a grid of items with the following list visible: HB_13, HB_1_3, HB_1113, HB_113, HB_113, HB_13, HB_13, HB_13, HB_KIT1, HB0, HB0002, HB1, HB1_BOM, HB10, HB100, HB100/200/300, HB100-10-66, HB100-10-66, HB100-10-a4-66, HB100-10-a4-66-b, HB100-10-a4-66-b, HB100-12, HB100-12-10, HB101, HB102, HB103, HB104, HB105, HB106, HB107, HB108, HB109, HB11, HB110, HB111, HB112, HB113, HB114. The item 'HB_1_3' is selected. The main panel contains tabs for 'Item Information', 'Vendor Information (0)', 'Warehouse & Resource Planning', 'Price Level Maintenance', 'Customer Items', and 'Currency'. The 'Item Information' tab is active, showing fields for Item Number (HB_1_3), Item Description (Audio System), Short Description (AS), Generic Description, Replaced By, Class ID (ATT CORD), Track (None), Queue (NEW ITEM), Item Type (Sales Inventory), Valuation Method (FIFO Perpetual), Quantity Decimals (0), Currency Decimals (5), U Of M Schedule (PHONE 1-10), Selling UoM (EACH), Purchasing UoM (EACH), Price Level (EXTRCLVL), Sales Tax Option (Based On Customer), Purchase Tax Option (Taxable), Sales Tax Schedule (USAUSSTCITY+6*), Standard Cost (10.00000), Current Cost (20.00000), List Price (40.00000), Allow Backorders (checked), Item Blocked (unchecked), Exclude From Sales Promotion (unchecked), Shipping (Shipping Weight: 5.00000, Height: 0.00000, Length: 0.00000, Width: 0.00000, Prepackaged, Dropship), Country of Origin, Country Description, Tax Commodity Code, H.S. Tariff Classification Number (0), Standard Carrier Alpha Code, Preference Criterion, and Producer. The 'Customer Items' tab shows fields for PDF (c:\hb_1_3.pdf), UPC (ATT), USCAT1 Map (Standard), USCAT2 Map (Memory), USCAT3 Map, and Special Instructions? (345). The 'Currency' tab is not visible. At the bottom right are 'Save & Close' and 'Cancel' buttons.

Note: In versions 4.1 and later, users can also edit the vendor number for a vendor item on the Vendor Information screen.

Note: In version 4.0 and later, all vendor information is editable from the

Item Maintenance screen.

Security

Item Maintenance must be enabled in the Security Editor to access the Item Maintenance screen. To edit items, Item Properties must be enabled, and Can Edit must be set to True.

To add items from Inventory Lookup, Inventory Lookup must be enabled and Can Create Items must be set to True (versions 4.0.987 and higher only).

Settings

Allow UOM Changes must be set to True to allow unit of measure changes in Item Maintenance (required for adding new items).