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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

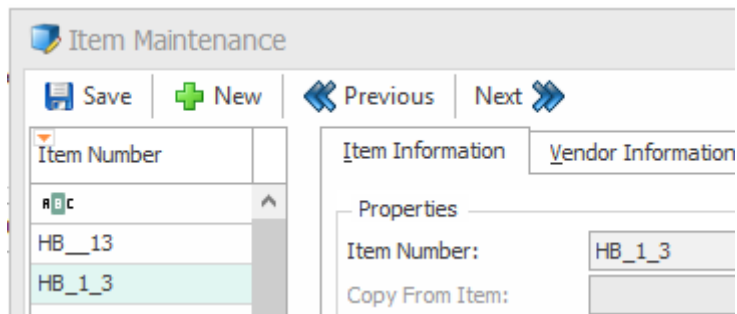
From Inventory Lookup

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.

The screenshot shows the 'Inventory Lookup' window. At the top, there are tabs for 'Customer Search' and 'Inventory Lookup', with the latter being active. To the right of the tabs, it says 'Customer: [AARONFIT0001] Aa'. Below the tabs is a toolbar with buttons: 'Close', 'Search', 'Clear', and 'New Item' (represented by a green plus sign). Below the toolbar are two tabs: 'Item Search' and 'Attribute Search'. Under 'Item Search', there is a 'Search By' section with two input fields: 'Item #' and 'Item Class'.

From Item Maintenance (5.6.10+)

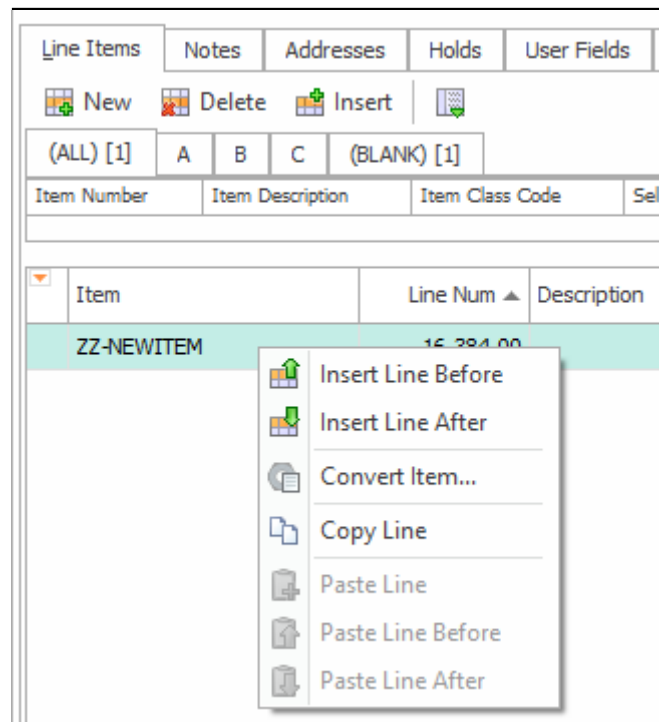
There is a New button that can be used to create items directly within the maintenance screen.



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).

Item Maintenance

Save New Previous Next Release

Item Number

Item Information Vendor Information (0) Warehouse & Resource Planning Price Level Maintenance Customer Items Currency

Properties

Item Number: HB_1_3

Copy From Item: ...

☐ Copy Item Standard Pricing

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: EXTPRCLVL

Sales Tax Option: Based On Customer Purchase Tax Option: Taxable

Sales Tax Schedule: Purchase Tax Schedule: USAUSSTCITY+6*

Standard Cost: 10.00000 Current Cost: 20.00000

List Price: 40.00000 ☒ Allow Backorders

☐ Item Blocked ☐ Inactive

☐ Exclude From Sales Promotion

Shipping

Shipping Weight: 5.00000 Height: 0.00000

☐ Prepackaged Length: 0.00000

☐ Dropship Width: 0.00000

Country of Origin: Country Description

Tax Commodity Code:

H.S. Tariff Classification Number 0

Standard Carrier Alpha Code Preference Criterion

Producer

Item User Fields

Gen. Info Packing Info Customs Info Manufacturing Info

PDF: c:\hb_1_3.pdf

UPC:

USCAT1 Map: ATT

USCAT2 Map: Standard

USCAT3 Map: Memory

☐ Special Instructions?

Item Option: AZ

Instructions: 345

Save & Close Cancel

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.

Item Maintenance

Save New Previous Next Release

Item Number

Item Information Vendor Information (2) Warehouse & Resource Planning Price Level Maintenance Customer Items Currency

New Delete

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.

The screenshot shows the 'Item Maintenance' window with the 'Warehouse & Resource Planning' tab selected. On the left, a list of items includes HB_13, HB_1113, HB_113, HB_13, HB_13, and HB_KIT1. The main area displays a table for assigning warehouses to item HB_13.

Location/Wlse.	Default Bin	Vendor	Vend Name	Fixed Qty	Order Point	Up To Level	Repln. Level	Order Policy	Inactive
104G		ACETRA...	A Travel Com...	0	250	1,000	Order Point Qty	Order Point	<input type="checkbox"/>
WAREHOUSE		BUSINES...	Business Mag...	0	20	50	Order Point Qty	Order Point	<input type="checkbox"/>
WC3		ACETRA...	A Travel Com...	0	0	0	Order Point Qty	Not Planned	<input checked="" type="checkbox"/>

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.

This screenshot shows the 'Item Maintenance' window with a 'Please Confirm...' dialog box overlaid. The dialog asks 'Save Changes to ItemMaster HB_1_3?' with 'Yes' and 'No' buttons. Below the dialog, a 'View Changes' window is open, showing a table of changes for item HB_1_3.

Business Object	Property	Original Value	New Value	Is D...	Is New
ItemMaster HB_1_3	Height	0	1	<input type="checkbox"/>	<input type="checkbox"/>
	Item_Generic_Descr...		HB 1 of 3	<input type="checkbox"/>	<input type="checkbox"/>
	Width	0	20	<input type="checkbox"/>	<input type="checkbox"/>
	Length	0	3	<input type="checkbox"/>	<input type="checkbox"/>
	Order_Point_Qty	250	555	<input type="checkbox"/>	<input type="checkbox"/>

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' window. At the top, there are 'Search' and 'Clear' buttons. Below them are tabs for 'Item Search' and 'Attribute Search'. The 'Search Criteria' section includes fields for 'Item:' (hb_1), 'Description:', 'Warehouse:' (WAREHOUSE), and 'Item Class:'. To the right, there are 'Custom Search:' fields for 'Search Field:' and 'Search Value:'. Below the search criteria, there are two tabs: 'Inventory Items (43 items found)' and 'Customer Items (0 items found)'. The 'Inventory Items' tab is active, showing a table with columns: Item Number, Description, UoM Sch..., Avail, Onhand, and Item Class. The table lists several items, with 'HB110' highlighted. Below the table, there are tabs for 'Inventory', 'Properties', 'Sales', 'Purchases', 'Notes', 'Returns Tracker History', 'Serial/Lot Numbers', 'Analysis', 'Item Quick Report', 'User Fields', and 'Item Sub:'. The 'Properties' tab is active, showing 'Basic Info' for item 'HB110'. The fields include: Item Number (HB110), Description (Audio System), Short Description (Audio), Generic Description, Item Type (Sales Inventory), Item Class (ATT CORD), Shipping Weight (5.00), User Field, and Replaced By.

Item Number	Description	UoM 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

Basic Info

Item Number	HB110		
Description	Audio System		
Short Description	Audio		
Generic Description			
Item Type	Sales Inventory		
Item Class	ATT CORD	User Field	
Shipping Weight:	5.00	Replaced By	

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. The left pane displays a list of item numbers, with 'HB_1_3' highlighted. The main pane is titled 'Item Information' and contains the following sections:

- Properties:** Item Number: HB_1_3, Copy From Item: (empty), Copy Item Standard Pricing: ☐.
- Item Description:** Audio System, Short Description: AS, Generic Description: (empty), Replaced By: (empty).
- Class ID:** ATT CORD, **Track:** None, **Queue:** (empty).
- Item Type:** Sales Inventory, **Valuation Method:** FIFO Perpetual, **Quantity Decimals:** 0, **U OF M Schedule:** PHONE 1-10, **Selling UoM:** EACH, **Purchasing UoM:** EACH, **Price Level:** EXTPRCLVL.
- Sales Tax Option:** Based On Customer, **Purchase Tax Option:** Taxable, **Sales Tax Schedule:** (empty), **Purchase Tax Schedule:** USAUSSTCITY+6*.
- Standard Cost:** 10.00000, **Current Cost:** 20.00000, **List Price:** 40.00000, ☒ Allow Backorders, ☐ Item Blocked, ☐ Exclude From Sales Promotion, ☐ Inactive.
- Shipping:** Shipping Weight: 5.00000, Height: 0.00000, ☐ Prepackaged, Length: 0.00000, ☐ Dropship, Width: 0.00000.
- Country of Origin:** (empty), **Country Description:** (empty), **Tax Commodity Code:** (empty), **H.S. Tariff Classification Number:** 0, **Standard Carrier Alpha Code:** (empty), **Preference Criterion:** (empty), **Producer:** (empty).

The right pane is titled 'Item User Fields' and contains the following sections:

- Gen. Info:** PDF: c:\hb_1_3.pdf, UPC: (empty), USCAT1 Map: ATT, USCAT2 Map: Standard, USCAT3 Map: Memory, ☐ Special Instructions?.
- Item Option:** AZ, **Instructions:** 345.

At the bottom right are buttons for 'Save & Close' and 'Cancel'.

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).