



Setting Up Sample Items on Sales Documents

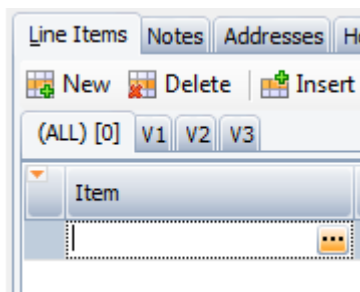
Megan De Freitas - 2024-11-22 - Sales

Overview

In SalesPad, you can set up sample items that are marked as sample when they show up on a sales document.

Usage

Create a new sales document. When you click **New** to add a new line item to the document, click the ellipsis (...) in the Item box.



This opens the Sales Inventory Lookup screen. In the Item search field, type the word PEN to display a list of items containing the word. Select the item PEN from the list and click the **Add as Sample** checkbox in the lower left corner of the screen.

Sales Inventory Lookup

Item Search

Search Criteria

Item: PEN Warehouse: WAREHOUSE

Search Options

- ☒ Match Beginning
- ☐ Search Previously Purchased
- ☐ Search 3rd Party Items
- ☐ Search Customer Items
- ☐ Search Vendor Items

Inventory Items (3 items found)

Item Number	Description	UORM Sched	Avail	Onhand	Item Class	Shipping Weight
BARREL ASSEMBLY	Pen barrel assembly	EACH	0.00	0.00	RM-ACT	0.00
PEN	Fancy pen	EACH	-3,751.00	2.00	RETAIL	0.50
PEN CAP	Metal cap for pen	EACH	-165.00	216.00	RM-ACT	0.00

Item Quick Reports | **Item User Fields** | **Item Substitutes** | **Item Sales Options** | **Item Inventory Analysis** | **Item Kit Components** | **Item Serial Attributes** | **Inventory Matrix View**

Not configured for Matrix Inventory

Drop Row Fields Here

Drop Column Fields Here

Grand Total







Drop Data Items

Matrix Setup

☒ Add as Sample

OK Cancel

The sample item itself is then automatically pushed into the item description in the sales line, so you will know specifically what type of sample it is.

Line Items		Notes	Addresses	Holds	User Fields	Audit	Related Documents	Purchases	Quick Re
 New		 Delete		 Insert		 Item Number			
						SAMPLE			
	Item	Description		Qty	Price	Ext Price			
	SAMPLE	Sample: Metal cap for pen /PEN CAP		1	0.00	0.00			

Settings

Sample Item Number - Determines the item number to use for a sample item.