Customer Item

The *Customer Item* screen lets you maintain details of an item for a particular customer with respect to the company's item codes. Customer item codes and descriptions are printed on sales order acknowledgments and sales invoices.

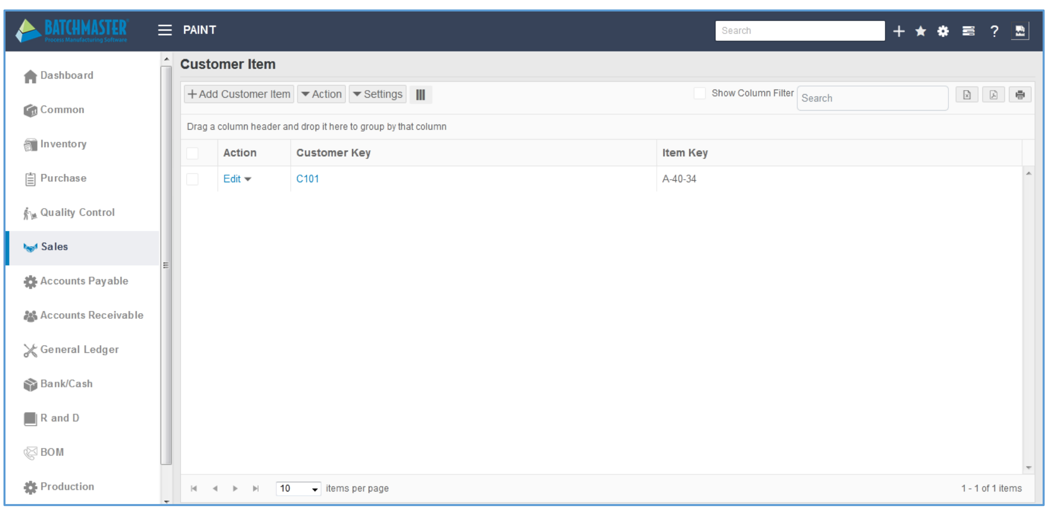
Prerequisite: Data should be set up at the following screens before creating a *Customer Item* record:

- *Customer Master*.
- *Item Master*.

Go To: Sales → Sales Master Data → Customer Item

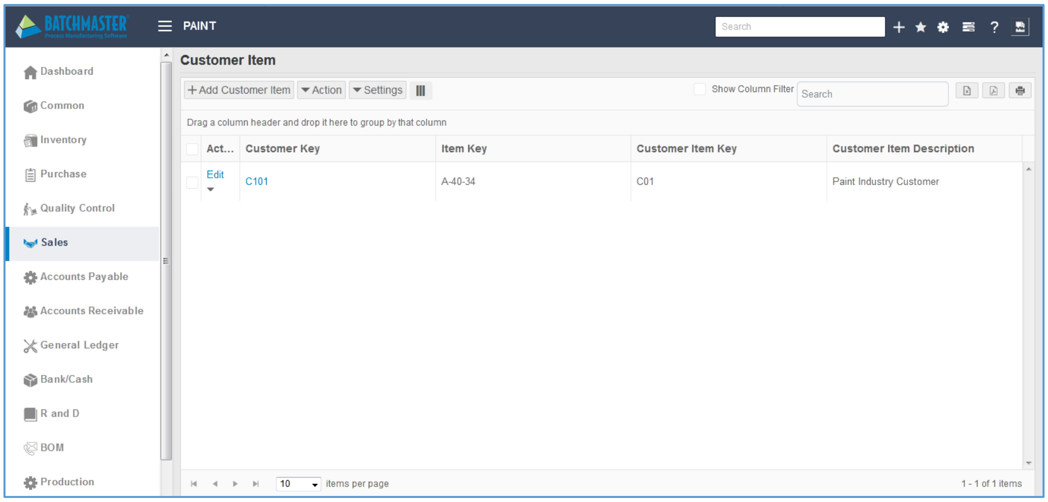
Customer Item – Dashboard

You can manage Customer Items from this dashboard. By default, the system displays all the existing Customer Items as maintained for your business/company. You can click on any of the customer item record to view its details.



The *Customer Item* dashboard contains many elements that occupy 100% of the browser window. Resizing the window would resize the elements to fit. The elements can be rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.

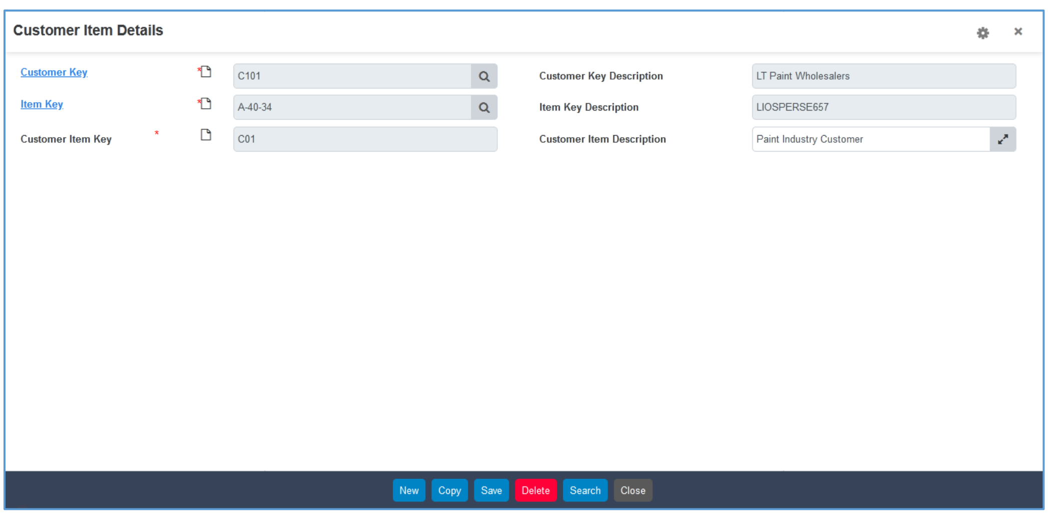
After you select all the columns of the *Customer Item* dashboard, the middle grid displays the selected columns.



The *Customer Item* dashboard provides a clear vision of the created records in a read-only mode. You can view the created records as per the number of pages provided per page.

Customer Item Screen – Add Mode

To add a new Customer Item Information to your BatchMaster database, click on the + *Add Customer Item* button. The system displays the *Customer Item Details screen*, where you can create a new record.



Customer Item Fields:

Customer Key: This is the Customer Key. This is a mandatory field.

Customer Key Description: This field displays the description associated with the customer key. This is a read-only field.

Item Key: This is the key of an inventory item. This is a mandatory field.

Item Key Description: This field displays the description associated with the item key. This is a read-only field.

Customer Item Key: This is the item key used for the selected item for the selected class, which may be printed on the SOs and the invoices. This Customer Item Key can be printed on Sales Orders and Invoices in the following order of decreasing preference. For this purpose, it may be necessary to add the corresponding field (from report.mdb) on the .rpt files for the report being printed.

1. Customer Item Key from Customer Item
2. Customer Item Key from Customer Class Item
3. Item Language Key from Item Language

Customer Item Description: This is the description used for the selected item for the selected class, which may be printed on the SOs and the invoices. This Customer Class Item Description can be printed on Sales Orders and Invoices in the following order of decreasing preference. For this purpose, it may be necessary to add the corresponding field (from report.mdb) on the .rpt files for the report being printed.

1. Customer Item Description from Customer Item
2. Customer Item Description from Customer Class Item
3. Item Language Description from Item Language

The Customer Item Description is printed on the Bill of Lading and the Inventory Bill of Lading in the following order of decreasing preference:

1. B.O.L. from the Bill of Lading Inventory Info
2. Customer Item Description from Customer Item
3. Customer Item Description from Customer Class Item
4. Item Language Description from Item Language
5. Item Description from Item Master

Creating a Customer Item Record

1. Open the *Customer Item* dashboard.

2. Click on the *+Add Customer Item* button to open a new blank record.

3. Use the lookup next to the *Customer Key* field to select the customer for whom a *Customer Item* record needs to be maintained. This is a mandatory field.

4. Use the lookup next to the *Item Key* field to select the item key of the item for which a *Customer Item* record needs to be maintained. This is a mandatory field.

5. Specify the item key the customer uses for the selected item in the *Customer Item Key* field. The customer item key can be printed on sales orders and invoices in the following order of decreasing preference:

    a. Customer item key from the *Customer Item* field.

    b. Customer item key from the *Customer Class Item* field.

    c. Item language key from the *Item Language* field.

    For this purpose, it may be necessary to add the corresponding field (from **report.mdb**) on the .rpt files for the report being printed.

6. Enter the description the customer uses for the selected item in the *Customer Item Description* field. This description can be printed on sales orders and invoices in the following order of decreasing preference:

    d. Customer item description from the *Customer Item* field.

    e. Customer item description from the *Customer Class Item* field.

    f. Item language description from the *Item Language* field.

    For this purpose, it may be necessary to add the corresponding field (from **report.mdb**) on the .rpt files for the report being printed.

7. The *Customer Item Description* is printed on the Bill of Lading and the Inventory Bill of Lading in the following order of decreasing preference:

    g. B.O.L. from the *Bill of Lading Inventory Info* record.

    h. Customer item description from the *Customer Item* field.

    i. Customer item description from the *Customer Class Item* field.

    j. Item language description from the *Item Language* field.

    k. Item description from the *Item Master* screen.

8. Click the *Save* button to save the Customer Item record.