

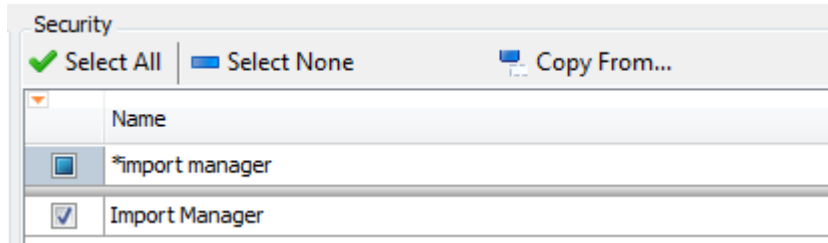


Alternate Item Import Manager

Megan De Freitas - 2024-12-03 - Inventory

Alternate Items functionality allows access to a vendor catalog without adding the items into inventory. In order to use this functionality, the vendor's catalog must be imported into the SalesPad® Alternate Items table via the **Import Manager** module.

1. Go to Modules > Security Editor
2. Filter to and select Import Manager for the user group that will be importing alternate items



3. To allow searching for alternate items in the Inventory Lookup module, filter to and select Inventory Lookup, and set *Can Access Alternate Item Catalog* to True
4. To allow searching for Alternate Items when accessing Inventory Lookup from the sales document screen, filter to and select Sales Inventory Lookup and set *Can Access Alternate Item Catalog* to True

Note: This sub-setting is available in versions later than 4.0.1169; prior versions do not require security to search for alternate/3rd party items when accessing Inventory Lookup from the sales document screen

To search for alternate items by default in Inventory Lookup (the "Search Alternate Items" setting is False by default):

1. Go to Modules > Settings
2. Filter to alternate items and set *Search Alternate Items* to True

Filter:	
Item Columns to Include In Audit	Item_Description;
Search Alternate Items	False
Search Vendor Items	False
Inventory Search Settings	
Display Summary Warehouse Quantities	True
Search Generic Description	False
Search Item Description	True

Importing the Vendor's Catalog

The vendor file must be imported into the spAlternateItems table in the SalesPad database.

The following is the table definition:

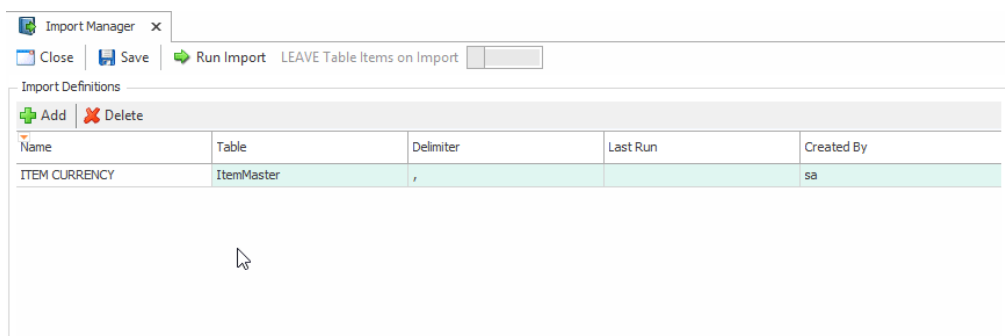
Field Name: Field Type:

ID int
Item_Number char(31)
Sec_Item_Number char(31)
Mfg_Item_Number char(31)
Mfg char(25)
Source_Name char(25)
Source_Item_Number char(31)
Item_Desc char(101)
Long_Desc nvarchar(1000)
Item_Class char(11)
Is_New bit
Last_Update datetime
Est_Cost numeric(19, 5)
Mfg_Cost numeric(19, 5)
Retail_Price numeric(19, 5)
Qty_Onhand int
Upc_Code char(15)
Delivery_Notes char(30)
Item_Notes nvarchar(2000)
UOFM char(9)

Note: Item_Number, Item_Desc, Est_Cost, Retail_Price, and UOFM are required fields that pull onto an order.

Alternate Item Import

1. Go to Setup/Utilities > Import Manager
2. Under Import Definitions (left side), click **Add**
3. Enter the Name of the import definition on the window that appears and click **OK**
4. Select AlternatItem from the **Table** dropdown
5. Enter the Delimiter type you are using
6. Click **Save**



7. Under Field Mappings (right side), click **Add**
8. Select a Table Field from the dropdown. The Table Field is the name of the SalesPad

Once the items have been imported, they are stored in the table spAlternateItems.

The Alternate Item Import uses the following stored procedures:

- sppUpdateAlternateItem
- sppUpdateAlternateItems
- sppUpdateImport

The Alternate Item Import uses the following tables:

- splImport
- splImportField - Stores the list of field mappings
- spAlternateItems - Stores the alternate items

The Alternate Item Import uses the following views:

- spvImport
- spvImportField
- spvAlternateItem

Searching Alternate Items

1. Go to Inventory > Inventory Lookup
2. Make sure the **Search Alternate Items** box is checked. Doing so enables the Alternate Items tab next to the Inventory Items tab
3. Enter search criteria and click **Search** or hit **Enter**. The Alternate Items tab will rename to "Alternate Items (**X** items found)"

The screenshot displays the 'Customer Search' window. At the top, there is a navigation bar with tabs for Application, CRM, Distribution BOM, Equipment Management, Inventory, Purchasing, Reporting, Returns Management, Sales, Setup / Utilities, and SignaturePad. Below this is a toolbar with various icons for different functions like Cash Receipts, Customer Discounts, Group Pricing, etc. The main search area has a 'Search By:' section with input fields for Customer, Contact, Phone, Sales Rep, City, State, Zip, and Strit. Name. There are also 'Custom Search:' fields for Search Field and Search Value. Below the search form is a 'Search Results' table with the following columns: Cust#, Cust Name, Sales Person ID, Addr Code, Contact Sales Rep, Contact Name, Email, Address 1, Phone 1, City, State, Zip, Contact Sales Territory, Priority Code, and Address 2.

Note: You can also search in the Item # field with the mfg item number for your alternate/3rd party items.