



Auto Item Conversion

Megan De Freitas - 2025-06-26 - Inventory

Overview

The Auto Item Conversion plugin takes a client's alternate items (3rd party items) and converts them into inventory items by adding them to the Item Master.

Requirements

- To use Auto Item Conversion, you must have items in the Alternate Items table. Refer to the [Alternate Item Import Manager](#) documentation for more information. Use Inventory Lookup to view these items.
- The Excel import requires the Manufacturing Item Number as well as the Item Number in the import, as it will convert to the manufacturing item number from the Alternate Item table. Refer to the [Import Manager](#) document for more information.
- The plugin only works with the unit of measure definitions of the EACH unit of measure schedule in GP.

Inventory Lookup

In Modules > Inventory Lookup, check the Search Alternate Items box and use the Alternate Items tab to search for alternate items. 3rd party items will display in this table.

The screenshot shows the SalesPad application interface with the 'Inventory Lookup' window open. The 'Search Alternate Items' tab is selected. The search criteria are set to 'Item #', 'Description', and 'Warehouse'. The search results are displayed in a table with columns: Mfg Item Number, Item Number, Item Desc, Long Desc, Mfg, Est Cost, Mfg Cost, Retail Price, Sec Item Number, UOM, and Item Class. The table shows 4 items found in the Alternate Items table.

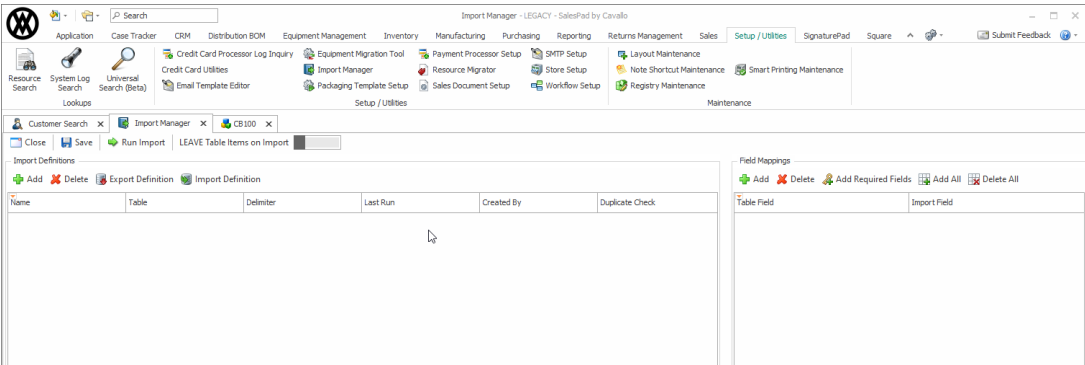
Mfg Item Number	Item Number	Item Desc	Long Desc	Mfg	Est Cost	Mfg Cost	Retail Price	Sec Item Number	UOM	Item Class
S100CB	CB100	Circuit Board	Standard Circuit Board	Granger	0.00	1.25	5.00		EACH	RETAIL
6100CBA	CBA100	Circuit Board Assembly	Standard Circuit Board ...	Granger	0.00	12.50	15.50		EACH	RETAIL
FBP100343	FBP100343	Blue Cross Pattern Fabric	Blue Pattern Fabric #10 ...	Lexington	0.00	12.50	20.00		EACH	RETAIL
FBP100342	FBP100342	Blue Pattern Fabric	Blue Pattern Fabric #10 ...	Lexington	0.00	12.50	20.00		EACH	RETAIL

You can import more 3rd party items with the [Import Manager](#).

Import Manager

Import Manager allows you to import item data from a 3rd party catalog file into the Alternate Items table. These items will be kept separate from inventory before using the Auto Item Conversion plugin. Items must be imported into the spAlternateItems table before

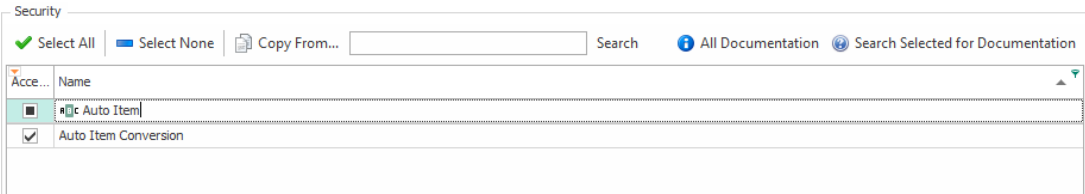
being auto converted. Refer to the [Alternate Item Import Manager](#) and [Import Manager](#) document for more information.



Security

To make Auto Item Conversion available during sales order entry, the security setting must be enabled in the Security Editor (Modules > Security).

To enable Auto Item Conversion, go to Modules > Security In the Security column, filter to "Auto Item" and make sure *Auto Item Conversion* is checked.

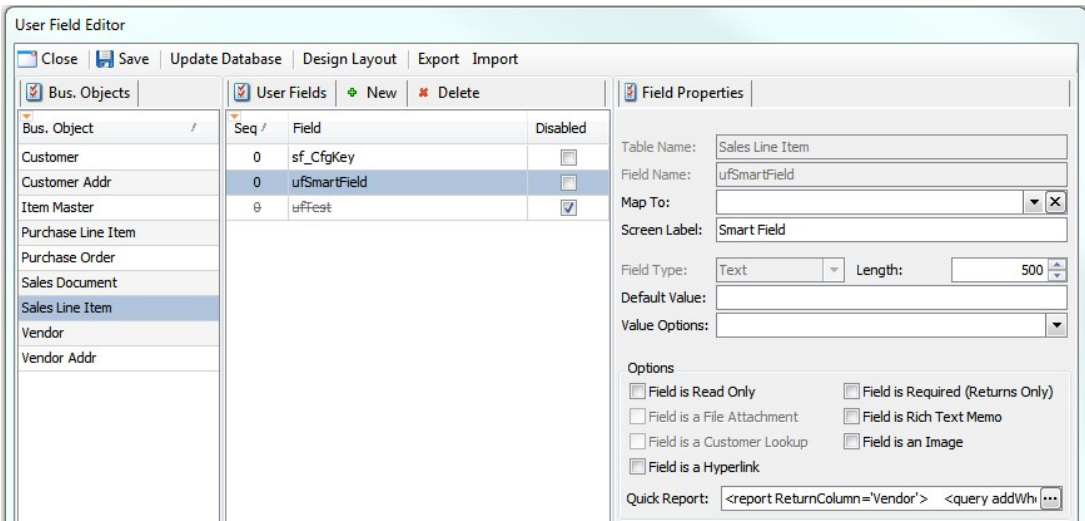


Note: You must log out and log back in for Security changes to take effect.

User Fields

Note: The user field used here is the same user field used for [Purchase Order Generation](#). If Purchase Order Generation has already been set up according to the instructions, you should not set up an additional user field.

In order to use Auto Item Conversion, you must set up a user defined field, as shown below. In the example, the field is called “ufSmartField”:



Add the following code to the Quick Report section under Field Properties (click the ellipsis to enter code):

```
select Vendor="", Vendor_Name=""
```

```
union
```

```
select Vendor = Vendor_ID + char(9) + Vendor_Name, Vendor_Name from spvVendor order  
by vendor
```

Note: Refer to the SalesPad [User Defined Fields](#) document for more information on configuring user fields.

Settings

To configure the necessary settings for Auto Item Conversion, go to Modules > Settings, filter to “smart”, and select *Sales Line Vendor Smart Field*. Enter the user field name (ufSmartField) into the field.

Filter: smart

Expand Collapse

Printing	
Allow Background Smart Printing	True
Sales	
Sales Line Item Package Smart Field	
Sales Line Vendor Smart Field	ufSmartField
Smart Printing	
Default Email Subject Line	SalesPad Auto Confirmation
Smart User Fields	
Blind Ship Field	
Do Not Charge Freight	
Vendor Contact Smart Fields	
Contact Bill To Field	
Contact Purch Agent Field	
Contact Ship To Field	

Sales Line Vendor Smart Field
The Sales Line Item user field that indicates the vendor for the line item.
This item has no default value.

Save your changes.

Sales Order Entry

During sales order entry, add as many alternate items to the sales order as needed. When finished adding items, run the Auto Item Conversion plugin, available under the **Actions** dropdown menu in the sales document.

Customer Search x Import Manager x CB100 x Security Editor x Settings x Sales Monitor x (ORDER) 2300000044 x

Close Save Print Delete Copy Allocate Unallocate Dynamics GP Purchase

Document Properties

Document #: 2300000044
Customer #: 000003
Project Name:
Cust PO:
Req Ship: 7/18/2023
Ship Method: GROUND
Whse: 01-N
Currency: Z-US\$

Configure Actions...

- Add Customer Default Items
- Add Item
- Add Rental Item (Beta)
- Aggregate Pricing
- Attach Sales Line to Manufacturing Order
- Attach Sales Line to PO
- Auto Item Conversion**
- Avatax Commit Tax

Shipping Address

testnewcust
4984984
Michigan City, MI

☐ Ship Complete



The plugin cycles through the items and adds them to the Item Master.

Note: There is no visual feedback after running the plugin, but an inventory search in the Inventory Lookup module will find the new item in that list.

Workflow

The Auto Item Conversion plugin can also be used as part of workflow setup, where the conversion will be handled automatically.

To add the plugin to workflow, go to Modules > Workflow Setup. Select the Document Type and Workflow Queue, then, in the Workflow Queues table, select Auto Item Conversion from the Plugin drop-down, at the queue you want items to be converted.

Next Queue(s)	Plugin	Print?	Eval
PICKING	 	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TEST2	Smart Printing	<input type="checkbox"/>	<input type="checkbox"/>
SHIPPING	Purchase Order Generation	<input type="checkbox"/>	<input type="checkbox"/>
WAITING DEL	Commit Catch Weights	<input type="checkbox"/>	<input type="checkbox"/>
READY TO INV	Auto Item Conversion	<input type="checkbox"/>	<input type="checkbox"/>
	Attach Sales Line to PO	<input type="checkbox"/>	<input type="checkbox"/>
PRINTING+	Aggregate Pricing	<input type="checkbox"/>	<input type="checkbox"/>
WAITING RECEIPT	Document Release	<input type="checkbox"/>	<input type="checkbox"/>
PRINTING+		<input type="checkbox"/>	<input type="checkbox"/>

When the document reaches that point in the workflow, it will call the plugin and automatically convert items from the 3rd party catalog to the Item Master.

Note: If Auto Item Conversion is not properly set up, you will receive an error each time a document reaches this point in the workflow process.