



Auto Item Conversion

Megan De Freitas - 2024-12-03 - 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 'Inventory Lookup' application window. At the top, there is a search bar and navigation tabs for 'Customer Search', 'Import Manager', and 'CB100'. Below the search bar, there are search options including 'Search By', 'Item #', 'Item Class', 'Warehouse', 'Custom Search', 'Search Field', 'Search Value', and 'Search Options'. The 'Search Options' section has checkboxes for 'Match Beginning', 'Search Alternate Items', 'Search Vendor Items', and 'Show Inactive'. Below the search options, there is a table with columns for 'Inventory Items (233 items found)', 'Alternate Items (4 items found)', and 'Vendor Items (136 items found)'. The table contains the following data:

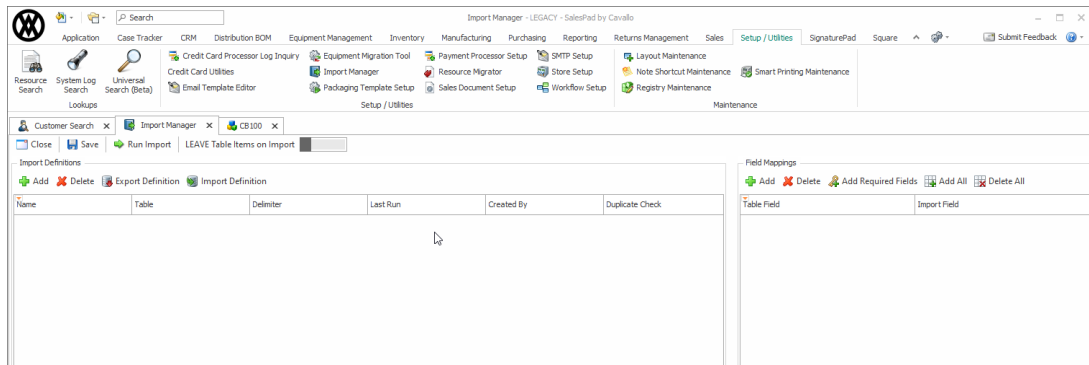
Mfg Item Number	Item Number	Item Desc	Long Desc	Mfg	Est Cost	Mfg Cost	Retail Price	Sec Item Number	UOM	Item Class
5100CB	CB100	Circuit Board	Standard Circuit Board	Granger	0.00	1.25	5.00		EACH	RETAIL
6100CBA	CBA100	Circuit Board Assembly	Standard Circuit Board ...	Granger	0.00	12.50	15.50		EACH	RETAIL
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

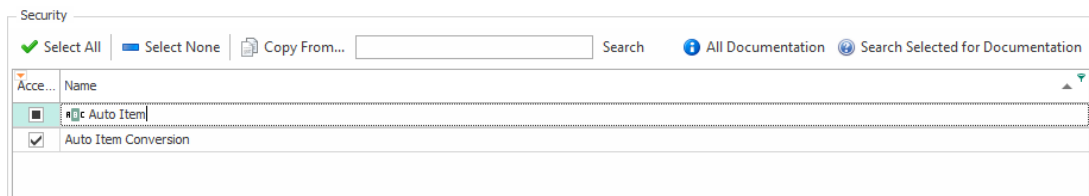
being auto converted. Refer to the [Alternate Item Import Manager](#) and [Import Manager](#) document for more information.



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.

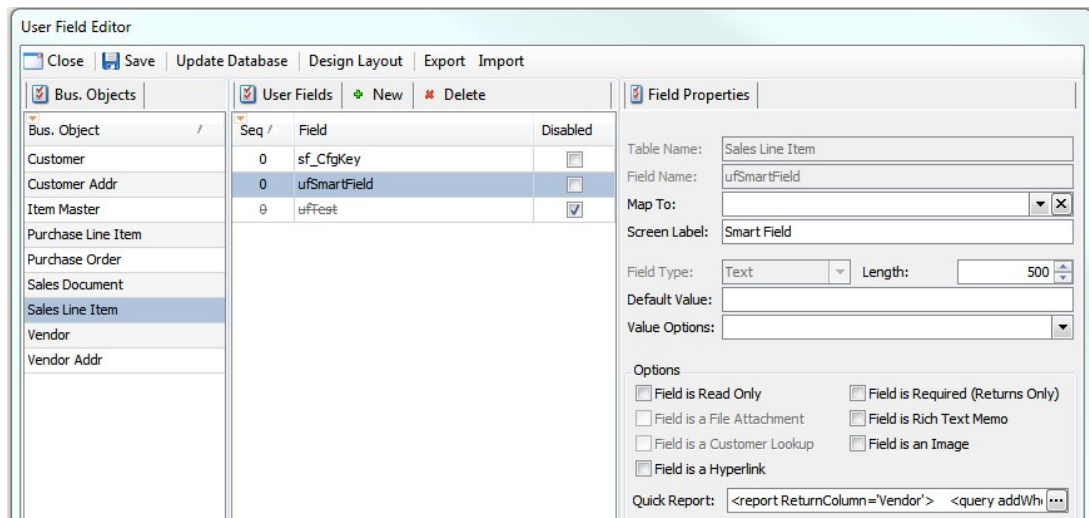


Note: You must log out and log back in for Security changes to take effect.

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":



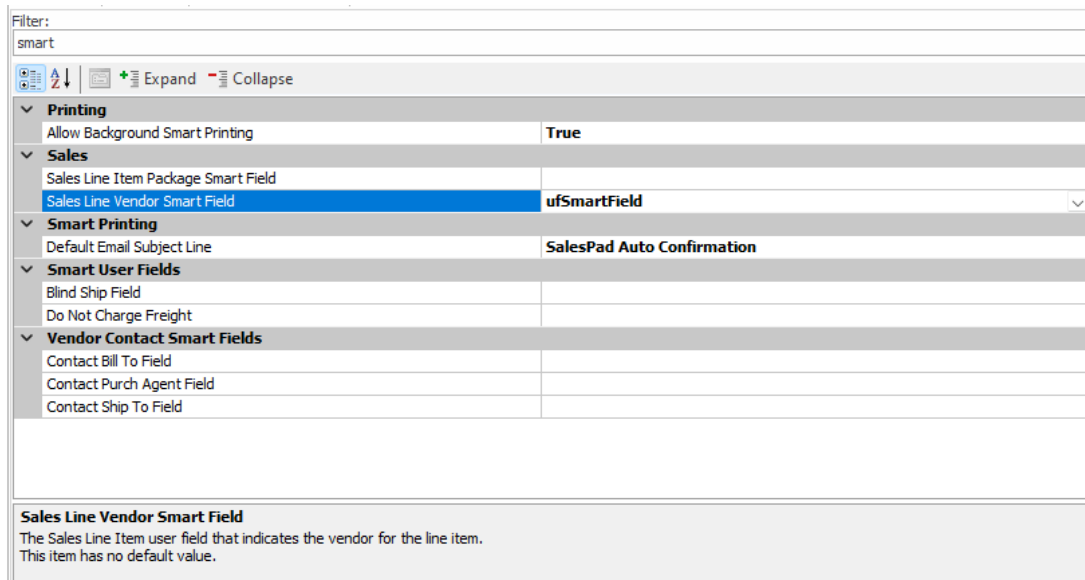
Add the following code to the Quick Report section under Field Properties (click the ellipsis to enter code):

```
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

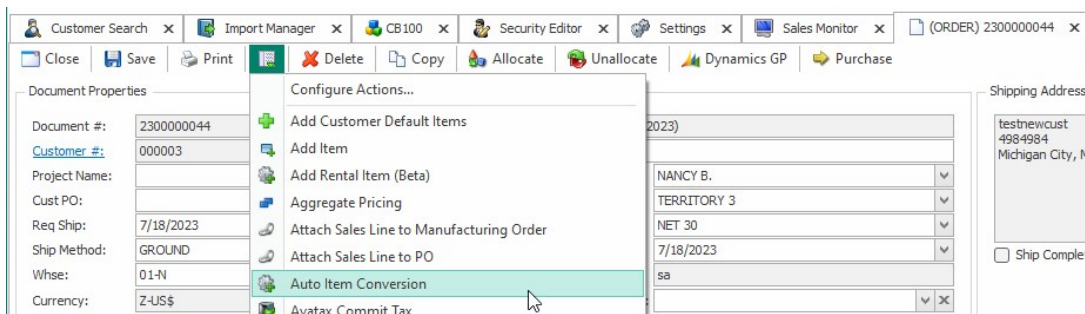
To configure the necessary settings for Auto Item Conversion, go to Modules > Settings, filter to "smart", and select *Sales Line Vendor Smart Field*. Enter the user field name (ufSmartField) into the field.



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.




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.