



Item Attributes and Customer Card Saved Attributes (New Versions)

Megan De Freitas - 2024-11-22 - Inventory

Overview

Item Attribute Classes are used to supplement the Inventory Lookup capability by allowing users to search for items meeting a specified set of criteria (from an imported table, configured in the Item Attribute Class Editor). Selected item(s) can then be added to a sales document.

In versions 4.0.1655 and later, Item Attributes are searchable from both Inventory Lookup and Sales Inventory Lookup (when Inventory Lookup is accessed from a sales line). Prior to version 4.0.1655, Item Attributes are only searchable from Sales Inventory Lookup.

Setup

ITEM ATTRIBUTES TABLE

Note: The Item Attributes function was designed to bring outside data into item searching in SalesPad. This is a very tailored setup and will be slightly different for everyone.

First, identify where your attribute data is located. For example, the following table, `_ItemAttribute`:

	Item_Number	Description	Make	Body_Style	Part_Year	Product_Line	Sequence_No	Product_Group
1	HD2050	ACCORD COUPE	HONDA	ACCORD COUPE	2008	HD	00001250	P
2	HD2050	ACCORD COUPE	HONDA	ACCORD COUPE	2009	HD	00001250	P
3	HD6326R	ACCORD COUPE	HONDA	ACCORD COUPE	2008	HL	00001562	P
4	HD6326R	ACCORD COUPE	HONDA	ACCORD COUPE	2009	HL	00001562	P
5	HD6326L	ACCORD COUPE	HONDA	ACCORD COUPE	2008	HL	00001718	P
6	HD6326L	ACCORD COUPE	HONDA	ACCORD COUPE	2009	HL	00001718	P
7	HD1054R	ACCORD COUPE	HONDA	ACCORD COUPE	2008	FN	00001796	P
8	HD1054R	ACCORD COUPE	HONDA	ACCORD COUPE	2009	FN	00001796	P
9	HD1054L	ACCORD COUPE	HONDA	ACCORD COUPE	2008	FN	00001835	P
10	HD1054L	ACCORD COUPE	HONDA	ACCORD COUPE	2009	FN	00001835	P
11	HD8107R	ACCORD COUPE	HONDA	ACCORD COUPE	2008	MR	00001875	P
12	HD8107R	ACCORD COUPE	HONDA	ACCORD COUPE	2009	MR	00001875	P
13	HD170392S	CIVIC HATCHBACK/COUPE	HONDA	CIVIC HB/COUPE	1988	LI	00001875	A
14	HD170392S	CIVIC HATCHBACK/COUPE	HONDA	CIVIC HB/COUPE	1989	LI	00001875	A
15	HD8107L	ACCORD COUPE	HONDA	ACCORD COUPE	2008	MR	00002187	P
16	HD8107L	ACCORD COUPE	HONDA	ACCORD COUPE	2009	MR	00002187	P
17	HD8108R	ACCORD COUPE	HONDA	ACCORD COUPE	2008	MR	00002343	P

Your attribute table is used to craft a custom view that combines with SalesPad requirements. SalesPad only requires the Item Number column in the attribute table as it is needed for actually adding the item to the order:

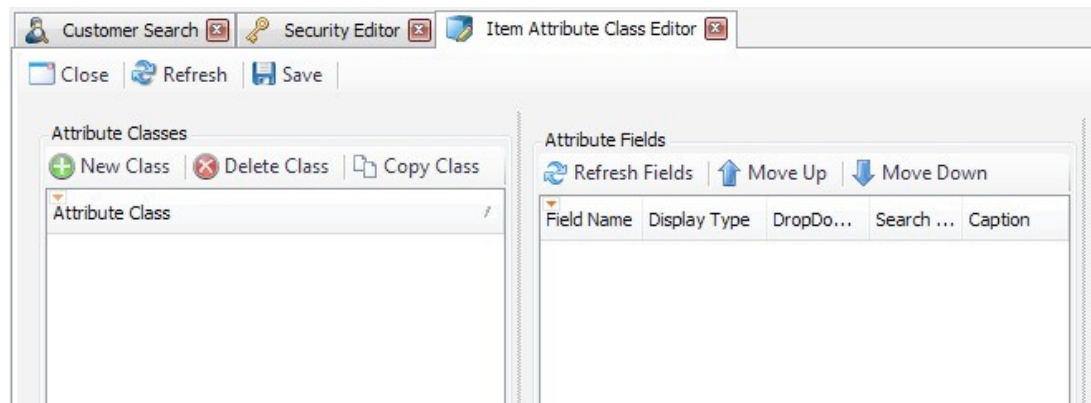
Define the view with the following SQL script example:

```

Create VIEW [dbo].[spcvAttributeItem] as
select
ia.Item_Number
, [Description] = isnull(im.Item_Description, ia.[Description])
, [Make]
, Body_Style
, Part_Year
, Product_Line
, Sequence_No
, Product_Group
, Avail_Qty=invs.Avail
, Onhand_Qty=invs.Onhand
from _ItemAttribute as ia with (nolock)
left join spvItemMaster as im with (nolock) on im.Item_Number=ia.Item_Number
left join spvInventorySearch as invs with (NOLOCK) on invs.Item_Number=ia.Item_Number

```

ITEM ATTRIBUTE CLASS EDITOR



After defining the view, add the columns into the system using the Item Attribute Class Editor. This module is used to set up and configure the Item Attribute Classes.

Go to Modules > Inventory > Item Attribute Class Editor. Click the **New Class** button on the left to create a new class. The Attribute Fields grid will automatically be filled based on columns from the database/SQL view “spcvItemAttribute”

Name the class in the new field (Example: VEHICLE ACCESSORIES, ENGINE, CAR AUDIO). Select the appropriate options for each field (see Attribute Field Options)*. Click **Save**, and repeat for new classes as needed.

Note: You can reorder sequences by highlighting a Field Name to be moved and using the **Move Up** or **Move Down** buttons.

*Attribute Field Options

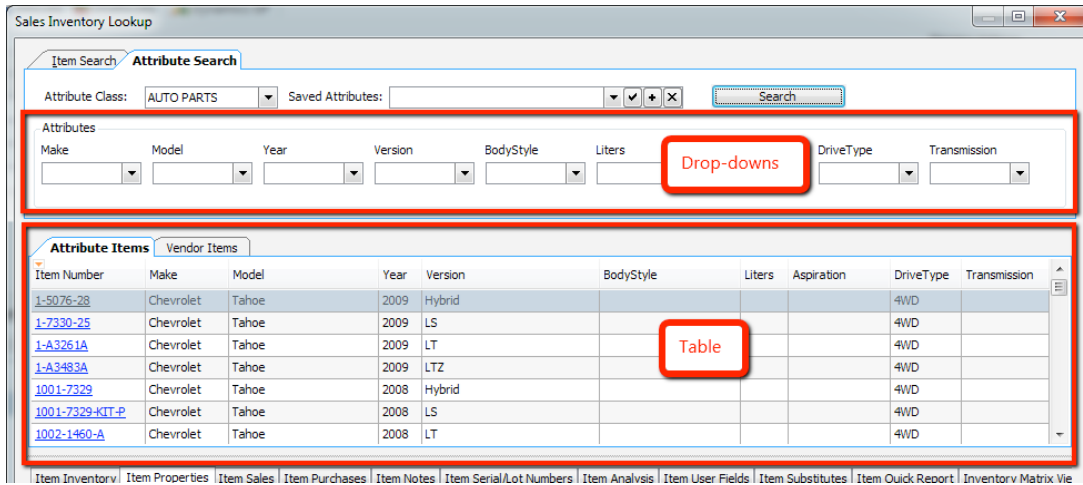
Attribute Fields have the following options:

Display Type determines how fields appear on the Attribute Search screen:

- Dropdown and Table: column will be displayed as a dropdown in the search area and

in the results grid

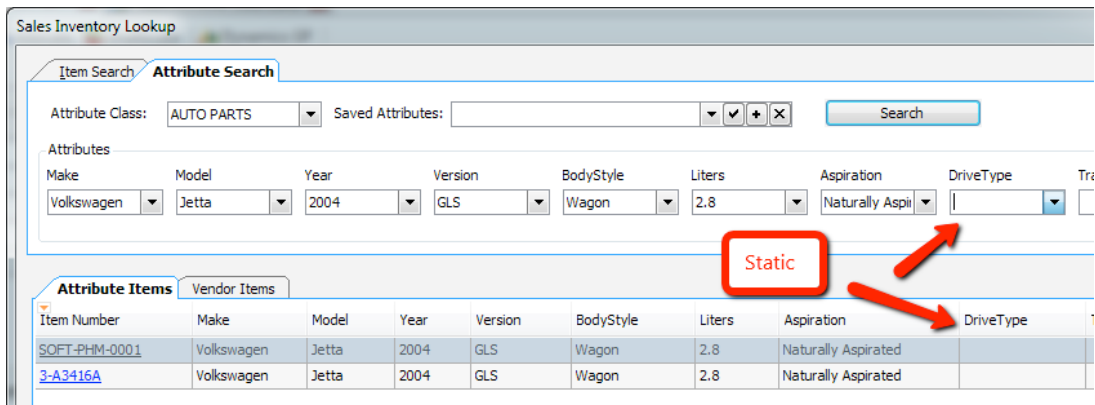
- Dropdown: column will be displayed only as a dropdown in the search area
- Table: column will be displayed only in the results grid
- Hidden: column won't show in the search area or the results grid



DropDown Type determines the behavior of the fields in the search area, as well as in the table:

- Static: dropdown will always appear in the search area (and/or in the table)
- Dynamic: dropdown will appear only if the field contains searchable values (at least one field must be type of Static in order to start)
- NA: Not Available (field is not a dropdown/column table)

Static



DriveType appears even if there is no value for the field, based on the selection of attributes. In this example DriveType has no values.

Dynamic

Attribute Class: Saved Attributes:

Attributes

Make	Model	Year	Version	BodyStyle	Liters	Aspiration
Volkswagen	Jetta	2004	GLS	Wagon	2.8	Naturally Aspir

Dynamic

Item Number	Make	Model	Year	Version	BodyStyle	Liters	Aspiration
SOFT-PHM-0001	Volkswagen	Jetta	2004	GLS	Wagon	2.8	Naturally Aspir
3-A3416A	Volkswagen	Jetta	2004	GLS	Wagon	2.8	Naturally Aspir

In this case, DriveType does not appear, since the field does not return any value.

Search Type determines the lookup behavior of dropdowns:

- Unconditional: each dropdown will pull all possible values from the field
- Conditional: each dropdown will pull all possible values from the field, based on the selection of the other fields
- Filtered: each dropdown will pull all possible values from the fields to its left
- NA: Not Available (field is not a dropdown)

Unconditional:

Attribute Class: Saved Attributes:

Attributes

Make	Model	Year	Version	BodyStyle	Liters
BMW					

Unconditional

- Cab & Chassis
- Convertible
- Coupe
- Crew Cab Pickup
- Extended Cab Pickup
- Extended Crew Cab Pickup

BodyStyle shows every possible value for that field.

Conditional

Sales Inventory Lookup

Item Search **Attribute Search**

Attribute Class: Saved Attributes:

Attributes

Make	Model	Year	Version	BodyStyle	Lite
<input type="text" value="BMW"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value=""/>	<input type="text"/>

Conditional

Attribute Items Vendor Items

Item Number

Convertible
Coupe
Sedan
Wagon

BodyStyle shows only values available under the conditions set from the selection (in this case, only values that belong to Make BMW).

Filtered

Sales Inventory Lookup

Item Search **Attribute Search**

Attribute Class: Saved Attributes:

Attributes

Make	Model	Year	Version	Body
<input type="text" value="Subaru"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Filtered

Attribute Items Vendor Items

Item Number

Sales Inventory Lookup

Item Search **Attribute Search**

Attribute Class: Saved Attributes:

Attributes

Make	Model	Year	Version	Body
<input type="text" value="Subaru"/>	<input type="text" value="Legacy"/>	<input type="text" value="2005"/>	<input type="text"/>	<input type="text" value=""/>

Filtered

Attribute Items Vendor Items

Item Number

GT
GT Limited
i
Limited

The principle is similar to Conditional, but Filtered requires a selection on each field on the left.

Inventory Lookup - Attributes Search

Open the Inventory Lookup or Sales Inventory Lookup screen and click the Attribute Search tab (will only be visible if item attributes have been set up):

The screenshot shows the 'Inventory Lookup' application window with the 'Attribute Search' tab selected. The 'Attribute Class' is set to 'AUTO PARTS'. The 'Attributes' section contains dropdown menus for Make (BMW), Model, Year, Version, BodyStyle, Liters, Aspiration, DriveType, and Transmission. Below this is a table of search results with columns for Item Number, Make, Model, Year, Version, BodyStyle, Liters, Aspiration, DriveType, and Transmission. The results table contains five rows of data. At the bottom, there is a detailed view of the selected item, showing fields for Basic Info, Quantities, and Pricing.

Item Number	Make	Model	Year	Version	BodyStyle	Liters	Aspiration	DriveType	Transmission
COMPDUIM	BMW	Z3	1999			2.5			
COMPUTER	BMW	Z3	2000			2.5			
CORDBG	BMW	Z3	2001			2.5			
COV100G	BMW	Z3	2002			2.5			
DISPLAY	BMW	Z4	2005			2.5			

Basic Info

Item Number	ADSD
Description	ADSD
Short Description	
Generic Description	
Item Type	Sales Inv
Item Class	RETAIL
Shipping Weight	0.00

Quantities

On Hand	0
On Order	0
Allocated	532
Backordered	117
Available	-532
Reorder Points	0

Pricing

UOM	PHONE 1-10
Item Tracking	None
List Price	2.00
Price	0.00

Select an Attribute class from the dropdown list on the top right. Fields will display in the Attributes box based on the class setup. Select Attributes from the dropdown lists and click **Search**. Results will appear in the Attribute Items grid directly below the search options (the more attributes you specify, the smaller the list should be). Select an item or items from the list to be added to the sales document. (Only applies if using Sales Inventory Lookup from a sales document.)

Note: If the Item Number is not in the item master, it will be added as a non-inventory item

Item Search **Attribute Search**

Attribute Class: AUTO PARTS Saved Attributes: SET 7 Search

Attributes

Make: Porsche Model: 911 Year: 2004 Version: 40th Annivers BodyStyle: Liters: Aspiration: DriveType: Transmission:

Item Number	Make	Model	Year	Version	BodyStyle	Liters	Aspiration	DriveType	Transmission
OM08620	Porsche	911	2004	40th Anniversary Edition		3.6			
24X IDE	Porsche	911	2004	40th Anniversary Edition		3.6			
BELL100	Porsche	911	2004	40th Anniversary Edition		3.6			

Item Inventory Item Properties Item Sales Item Purchases Item Notes Item Serial/Lot Numbers Item Analysis Item Substitutes Item Inventory Analysis Inventory Matrix View Item Kit

Basic Info

Item Number: OM08620 Description: Office Chair 1 Short Description: Chair Generic Description: Item Type: Sales Inv Item Class: CATALOG Shipping Weight: 54.50

Quantities

On Hand: 1,000 On Order: 0 Allocated: 50 Backordered: 0 Available: 950 Reorder Points: 0

Pricing

UoM: EACH Item Tracking: None List Price: 299.99 RETAIL Price: 499.95

Add As Sample OK Cancel

Click **OK** to return to the sales document

SAVED ATTRIBUTES

Item Search **Attribute Search**

Attribute Class: AUTO PARTS Saved Attributes: Audi Quattro Search

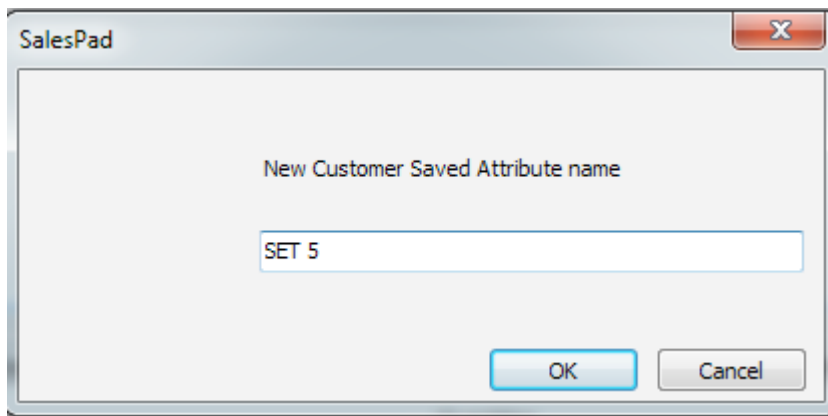
Attributes

Make: Audi Model: A4 Quattro Year: 2000 Version: BodyStyle: Liters: Aspiration:

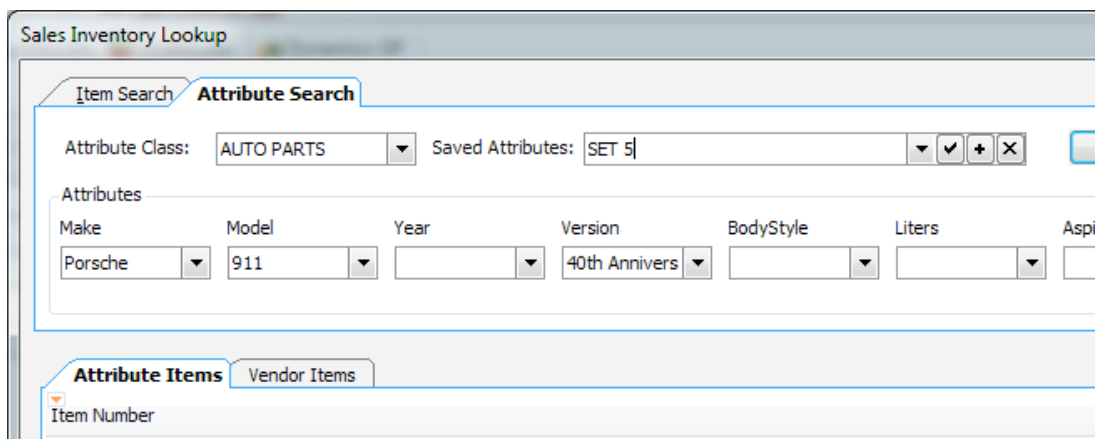
Attribute Items Vendor Items

When using Attribute Search from Sales Inventory Lookup, users can save the set of attributes for the current customer.

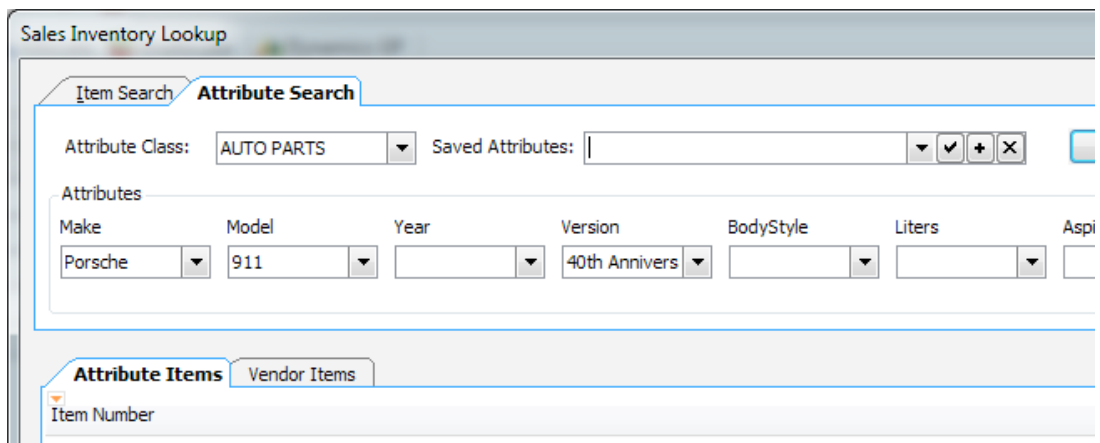
To add a new set of attributes, click the Add (+) button. An input box will prompt for a name for the saved attribute:



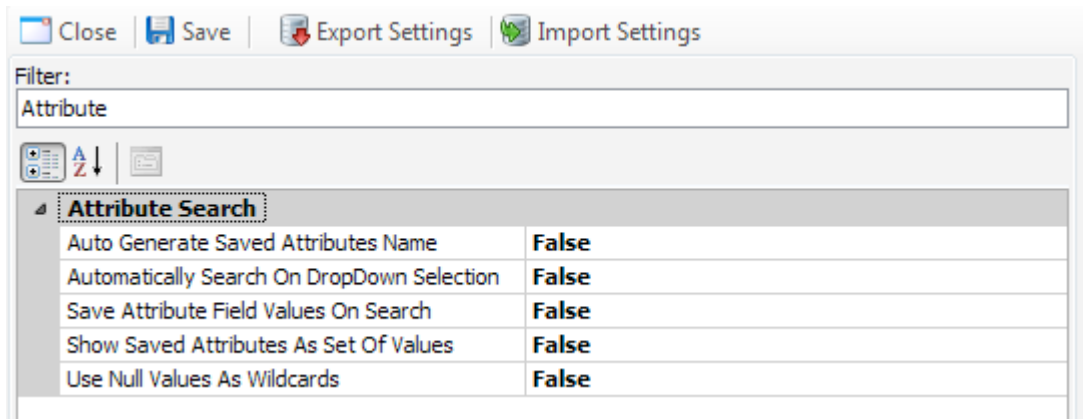
To save the current set of attributes click the Save () button. This will update the values for the Saved Attributes selected.



Click the Delete () button to remove a set of attributes. Note that, when you delete a Saved Attribute, the set of values does not get cleared.

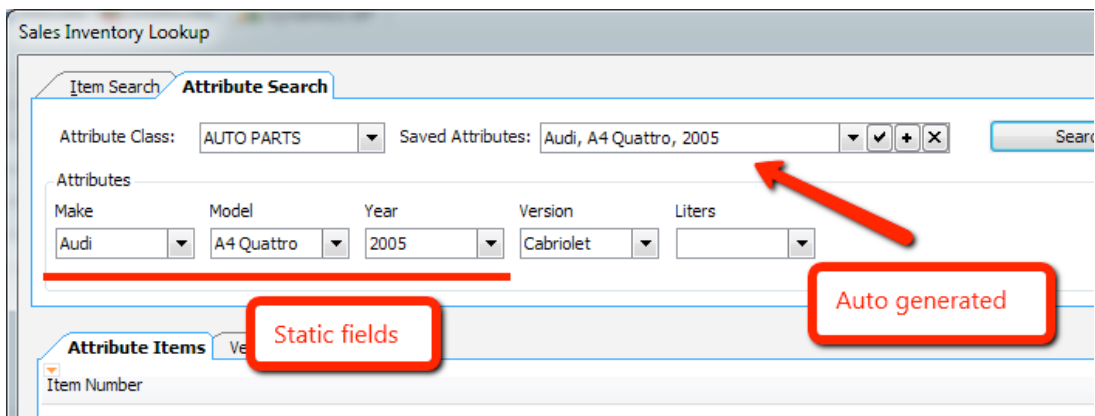


Attribute Search Settings



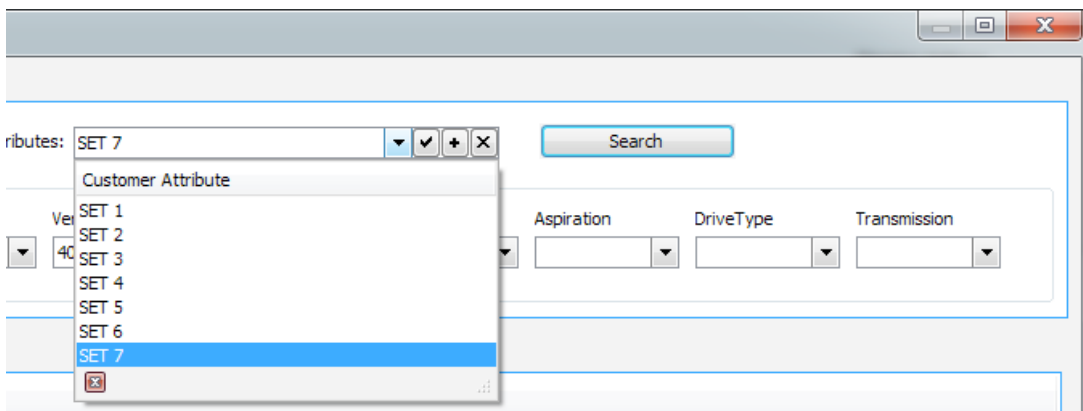
- *Auto Generate Saved Attributes Name*: if set to True, it will automatically generate the name of the set of attributes on save. The name will be composed of all the values of the Static fields, separated by comma.

Note: Auto-naming requires that all Static dropdowns contain a value.

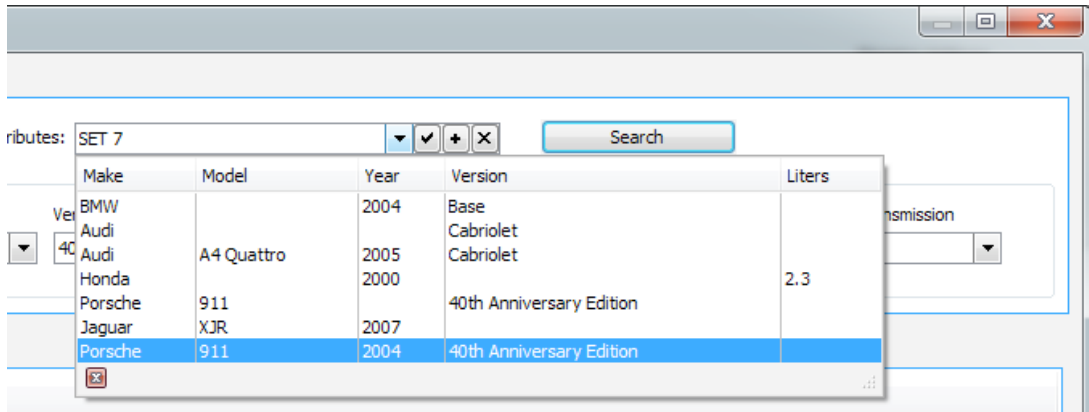


- *Automatically Search On DropDown Selection*: the Search is triggered each time an attribute value is changed (instead of clicking the Search button).
Note: Auto-search requires that all Static dropdowns contain a value.
- *Save Attribute Field Values On Search*: the set of attributes is saved automatically on search.
- *Show Saved Attributes A Set Of Values*: if set to True, the Saved Attributes dropdown will show the list of values (instead of the list of set names)

Set to False: list of names:

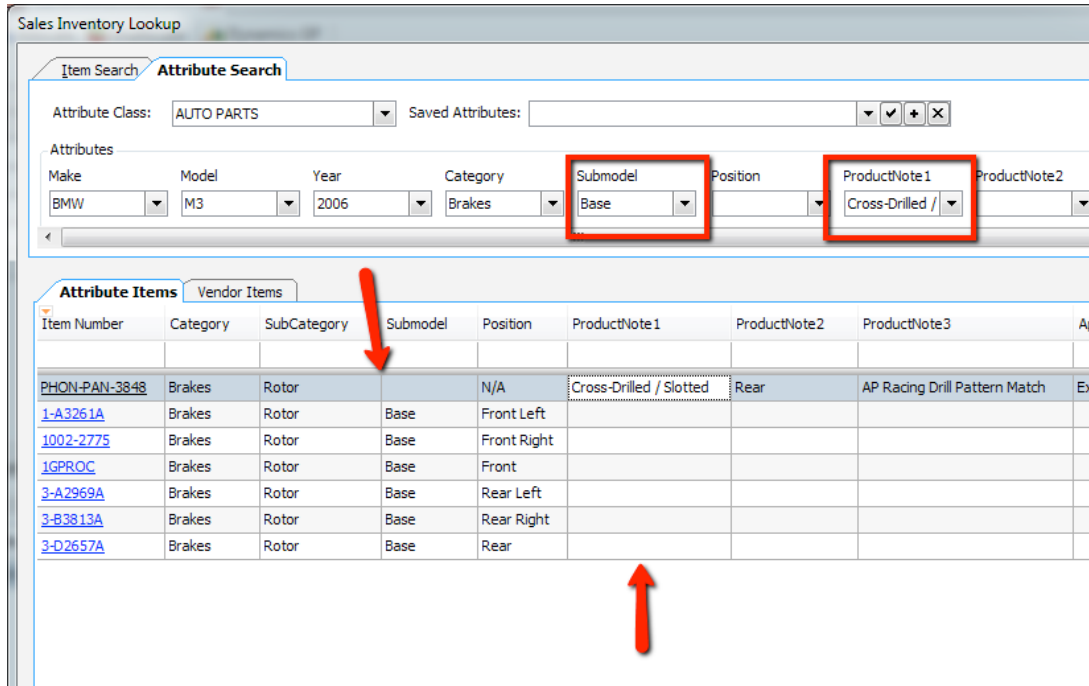


Set to True: list of values:



- *Use Null Values As Wildcards*: this option allows user to treat NULL values as wildcard, determining different searching behaviors.

Set to True: in this example, filtering by Submodel and ProductNote1 includes NULL values in the result table:



Set to False: in this example, filtering by Submodel returns only values that are not NULL:

Sales Inventory Lookup

Item Search **Attribute Search**


Attribute Class: Saved Attributes:

Attributes

Make: Model: Year: Category: Submodel: Position:

Attribute Items Vendor Items

Item Number	Category	SubCategory	Submodel	Positi
1-A3261A	Brakes	Rotor	Base	Front
1002-2775	Brakes	Rotor	Base	Front
1GPROC	Brakes	Rotor	Base	Front
3-A2969A	Brakes	Rotor	Base	Rear
3-B3813A	Brakes	Rotor	Base	Rear
3-D2657A	Brakes	Rotor	Base	Rear



Customer Card Saved Attributes Tab

On the customer card, users can create and manage one or more sets of attributes within the Saved Attributes tab using the **Add Attribute**, **Delete Attribute**, and **Copy Attribute** buttons:

Contact Addresses | CRM | Note | A/R | Item History | Sales Documents | Credit Cards | User Fields | Sales Graph | Extended Pricing | Quick Report | Contract Pricing | **Saved Attributes** | Special Pricing | Equipment | Recurring Sales | Emails | Item Sales

Customer Saved Attributes

Customer Attrib...	Customer Attribute	Default	Attribute Class	Make	Model	Year	Body Style
1.00	ATTRIBUTE DATA	<input type="radio"/>	AUTO (FILTERED)	Subaru	Impreza	2010	Sedan
4.00	AUTO FILTERED	<input checked="" type="radio"/>	AUTO (NOT FILTERED)	Chrysler	300	2005	Coupe
5.00	SET VALUES	<input type="radio"/>	AUTO (FILTERED)	Volvo	240		
12.00	ATTRIBUTES	<input checked="" type="radio"/>	AUTO (FILTERED)	Subaru	Legacy	2010	Sedan
13.00	AUTO NOT FILTERED	<input type="radio"/>	AUTO (NOT FILTERED)	Chrysler	300	2001	

A selection in the Default column determines which customer attribute set is loaded when opening Sales Inventory Lookup (one default customer attribute set per class).

Attributes listed here will appear in the Saved Attributes dropdown on the Sales Inventory Lookup screen.

Security

Item Attribute Class Editor must be enabled in the Security Editor (Modules > Security) to edit item attributes. Find the setting in the security grid and make sure it is checked.

Customer Saved Attributes must be enabled in order to use the Saved Attributes tab on the Customer Card (4.0.1655+ versions only).

Save any changes.

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