

Item Details

Overview

An item detail is a field on the item record that allows you to capture specific information about this piece. These fields can be setup to accept any input, restricted to numbers only, or linked to a list of predefined choices. Details are setup on the category record and apply to all items in that record.



NOTE: Only details mapped to the appropriate database storage can be searched via the Item Filter. See the Advanced Options section of this document for more information on available storage fields and how to map them.

Viewing Item Details

The default Edge categories come with preset details. You can view and modify these from the respective category's **Details** tab. To view a category's details:

1. Use **Inventory > Categories > List** to find and **Edit** the category you wish to view.
2. Click on the **Details** tab.

3. Details can be split into two groups. This can be useful for items like pendants where you can have separate details for the pendant and chain.
4. Each detail consists of a **Detail Name**, **Detail Type**, and **More...** button.

Detail Name	Detail Type	Advanced Options
Style	Item Style.Pendant	More...

Detail Name Label for this field on the item record

Detail Type Defines what goes in this field; this can be setup to accept any text input, limited to numbers only, or linked to a predefined list of choices.

More... Contains options that allow you to make the field required and link it to an internal storage field so it is searchable. See the **Advanced Options** section of this document for more information.

5. When you view an item from this category the details appear in the lower left of the record.

Notice Color is not filled in. This is because it is not a required field. If you want to make a detail required, see the Advanced Options section.

6. See the next section for information on creating and working with details.

Creating an Item Detail

Item detail fields can be linked to an empty field that accepts user input or to a list of predefined choices.

User Input

To create a blank detail field that accepts user input:

1. Use **Inventory > Categories > List** to find and **Edit** the category you wish to add the detail to.
2. Click on the **Details** tab.
3. Find the next unused detail and enter your **Detail Name**. In this example, we'll be creating a detail to store chain length.

4. Click the **Detail Type** drop-down. There are three options that accept user input:

NUM Only accepts numbers

DOL Only accepts numbers and displays them as currency (dollars)

TEXT Accepts any text characters

- Because length will always be a number, we select **NUM**.

Length NUM More...

- Save your changes.
- The detail now appears as a field on all items in this category.

The screenshot shows the 'ITEMS - 001-160-03285' form. The 'Chain Details' section is expanded, showing a table with columns for 'Detail Name', 'Detail Type', and 'Advanced Options'. The 'Length' field is highlighted with a red box, and its data type is set to 'NUM'. The form also shows 'Pendant Details' and 'Inventory' sections.

- This detail cannot be searched by yet. See the **Advanced Options** section for information on mapping this to a searchable database field.

Predefined List

To create a detail field linked to a list of choices:

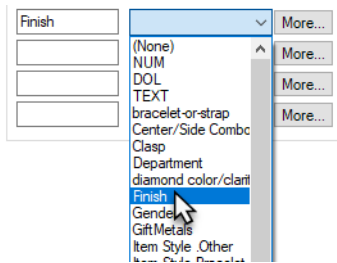
- Use **Inventory > Categories > List** to find and **Edit** the category you wish to add the detail to.
- Click on the **Details** tab.
- Find the next unused detail and enter your **Detail Name**. In this example, we'll be creating a detail to store chain finish.

The screenshot shows the 'Predefined List' form with two detail groups: 'Pendant Details' and 'Chain Details'. The 'Chain Details' group has a 'Finish' field highlighted with a red box, and its data type is set to 'NUM'.

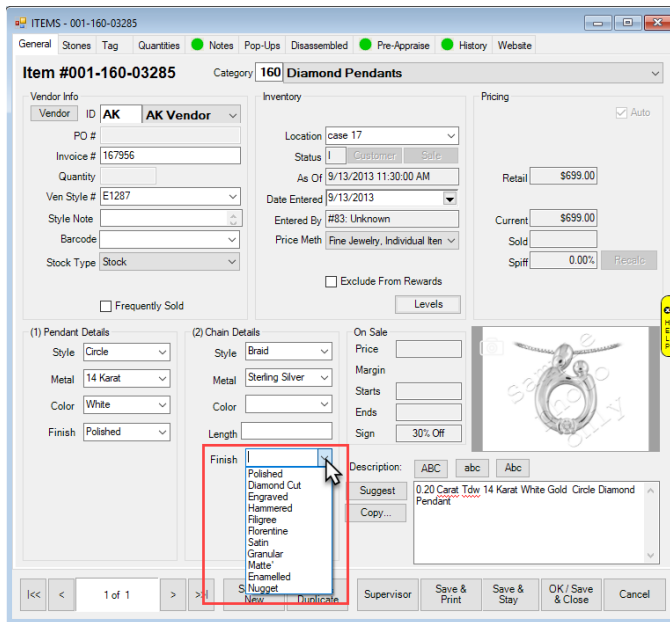
Detail Name	Detail Type	Advanced Options
Style	Item Style.Pendant	More...
Metal	PrecMetals	More...
Color	Metal Color	More...
Finish	Finish	More...
		More...
		More...
		More...
		More...

Detail Name	Detail Type	Advanced Options
Style	Item Style.Chains	More...
Metal	PrecMetals	More...
Color	Metal Color	More...
Length	NUM	More...
Finish		More...
		More...
		More...
		More...

- Click the **Detail Type** drop-down. All options below **TEXT** are lists. Select the **Finish** list to link it.



- Save your changes.
- The detail now appears as a field on all items in this category and there is a drop-down that shows the available choices from the list.



To create or modify a list:

- Click **Administrative > Lists**. A list of all lists will appear.
- To modify a list, select and **Edit** it.

Name	System	Modified	Use Count
bracelet-or-strap			5
Center/Side Combo			0
Clasp			5
Department			0
diamond color/clarity			2
Finish			78
Gift Metals			0
Item Style .Other			13

- Current values in the list will be displayed. Each list item contains a **Short Value** (abbreviation) and **Long Value** (spelled out).

Short Value	Long Value
PO	Polished
DI	Diamond Cut
EG	Engraved
HA	Hammered
FI	Filigree
FL	Florentine
SA	Satin
GR	Granular
MA	Matte
EN	Enamelled
NU	Nugget

Add Item	Create a new list entry
Delete Item	Delete a list entry
Edit Item	Edit a list entry
Move Up/Down	Change the order by moving list items up or down

- After making any changes, be sure to save them with one of the save buttons at the bottom.
- To create a new list, click **Administrative > Lists** and use the **Add** button at the bottom. Then, add list items to it.

Advanced Options

Each detail on the category record has a **More...** button that contains additional options.

Required	Marks this detail as required; users will not be able to save items unless this detail is entered
Must Match List	Only available for details linked to lists; if checked forces users to select from list; if unchecked, they can select from list OR type into this field instead
Storage	Internal storage field this detail is linked to; see next section for information on available data mappings

Storage

The **Storage** drop-down allows you to map this detail to a specific database field. Only mapped details can be searched using the item filter.

Available storage fields include:

- itStyle
- itMetalFinish
- itMetalColor
- itMetalType
- itMetalWeight
- itMillimeter
- itSize
- itLength
- itMfg

Corresponds to searchable fields on Item Details tab of Item Filter:

To map an item detail to its appropriate database field:

- Use **Inventory > Categories > List** to find and **Edit** the category.

- Click on the **Details** tab.
- In this example, we have a detail for length that was created earlier in the **Creating an Item Detail** section. While this detail will show on all items for this category, it is not mapped to itSize and therefore cannot yet be searched using the **Size** fields on the **Item Filter**.
- Click on the **More...** button in the detail row for Length.

Detail Group 2

Group Name

Detail Name	Detail Type	Advanced Options
Style	Item Style.Chains	More...
Metal	PrecMetals	More...
Color	Metal Color	More...
Length	NUM	More...
Finish	Finish	More...
		More...

- Use the **Storage** drop-down to select **itSize**.

Details: Advanced Options

Required

Must Match List

Storage

- itStyle
- itMetalFinish
- itMetalColor
- itMetalType
- itMetalWeight
- itMillimeter
- itSize**
- itLength
- itMfg
- itOldBarcode
- itOldKey

Save

- Save your changes.

NOTE: Changing **Storage** on an existing detail that you have been actively using will cause all previously entered items to “lose” this detail’s value.



For example, if you had previously added a field for Millimeter but did not have it mapped, linking it now will cause all items that have a millimeter value already specified to lose this value.

Contact Support for assistance in migrating this data.

Default Storage Fields

The Edge contains default storage locations that are automatically used when no special storage field is specified. These are database fields itDetail_1 through itDetail_16 and correspond to the detail’s position on the category record.

General Pricing Details Tags Taxes Description Template

Detail Group 1

Group Name

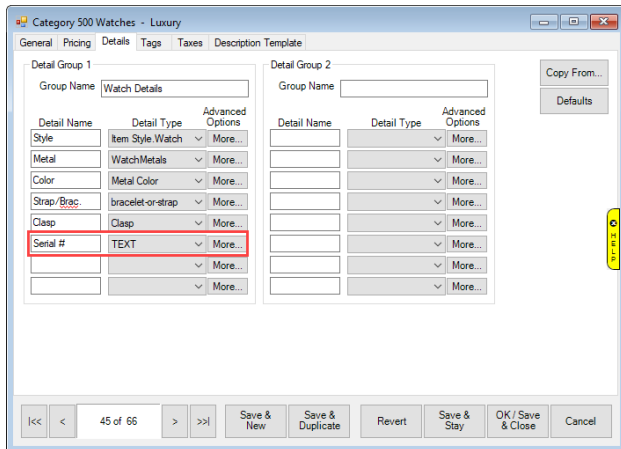
Detail Name	Detail Type	Advanced Options
itDetail_1		More...
itDetail_2		More...
itDetail_3		More...
itDetail_4		More...
itDetail_5		More...
itDetail_6		More...
itDetail_7		More...
itDetail_8		More...

Detail Group 2

Group Name

Detail Name	Detail Type	Advanced Options
itDetail_9		More...
itDetail_10		More...
itDetail_11		More...
itDetail_12		More...
itDetail_13		More...
itDetail_14		More...
itDetail_15		More...
itDetail_16		More...

For example, if we add a detail to our watch category to hold serial numbers...



...and do not specify storage, this will be automatically saved internally to **itDetail_6**.

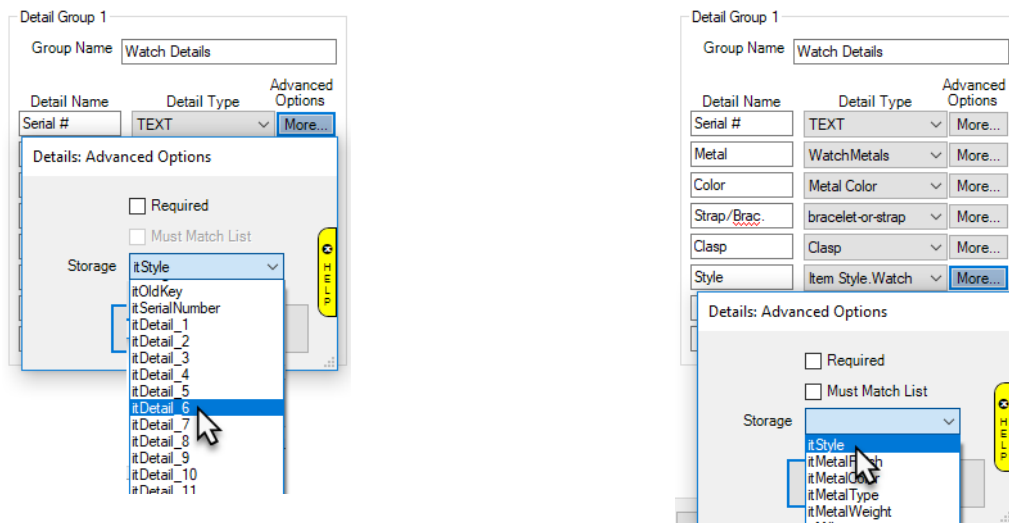
Normally, you should not need to change these. However, if you decide that you want to change the order of the details, it is important to know where the underlying data is being stored.

For instance, if you wanted to trade the positions of Style and Serial #, you would need to adjust the underlying storage otherwise all data already captured will be in the wrong place and will not display on the item record.

If you click the **More...** button for the Style detail you will see its storage set to **itStyle**.

If you click the **More...** button for the Serial # detail you will see storage is blank. Any time storage is blank it uses the default storage displayed on the previous page's image, in this case **itDetail_6**.

If you wanted to swap the placement of Style and Serial #, you would need to click **More...** and update the storage for Serial # to **itDetail_6**. Then you would do the same for Style and change it to **itStyle**.



NOTE: If you want to change details on existing categories that already have merchandise it is recommended you contact Support for assistance.