# **Item Detail Wizard**

## **Overview**

The **Item Detail Wizard** is used to create and edit the customizable details found on every item record. These details are managed from the **Category** record's **Details** tab. Note that this wizard replaces the previous manual method of detail management.

#### **Creating a New Detail**

To create a new detail:

- 1. Click Inventory > Categories > List and Edit the category.
- 2. Click on the **Details** tab.

General	Pricing	Details	Tags	Taxes	Descriptio	n Template				
Detail	Group 1					Detail 0	iroup 2			Copy From
Gro	up Name	Ring De	etails			Grou	p Name			Defaults
Deta Style	il Name		Detail Ty Style.EG		Edit	Detai	Name	Detail Type	Create	
Metal		PrecM	<b>Netals</b>		Edit				Create	
Color		Metal	Color		Edit				Create	
Finish	ı i	Finish	ı I		Edit				Create	
Ring S	Size	NUM			Edit				Create	
MM \v	lidth	NUM			Edit				Create	
					Create				Create	
					Create				Create	

- 3. There are 16 available details. Unused detail fields will display with a **Create** button while existing details will show an **Edit** button. To create a new detail, select an available position and click **Create**.
- 4. The Item Detail Wizard will appear.

Detail Name:				
(50 character max.)				
Create New				
Select this option if	you wish to creat	e a new item i	detail.	
Copy From Anot Select this option to		datail farm a		
You will be able to n		detail from a	ny category.	

- 5. Specify a Detail Name (e.g. Metal), select Create New, and click Next.
- 6. Select a Detail Type:

Number Text box that only accepts numbers.

**Dollar** Text box that only accepts numbers and displays as currency.

Text Text box that accepts any input.

List Links this detail to a list of predefined choices.

- 7. Check **Required** if this detail must be filled in on items entered into this category.
- 8. If selecting a List, you must choose whether you want to Create a New List now or link to an Existing

#### List.

Item Detai	ls Wizard				Ê
Detail Name:	Metal				
Select a Detail Type Detail Type:	and Storage Field to proceed.				
Oollar					
🔿 Text					
List	Create New List	New List Name:	Metal	100	
	O Use Existing List				
Required					
Must Match List					
Storage Field: Cu	stom Detail	~			
NOTE - Custom De	tails are not searchable. All oth	er Storage Fields a	are sear	chable via the Ite	m Filter.
	elect the proper storage to mai	-			
it is important to si	need the proper storage to man	main runctionality	, e.g. m	ig aizea arioulu b	e stored in size

- 9. If selecting a **List**, check **Must Match List** if this detail can only contain entries from the list. If unchecked, associates will be able to pick from the list OR enter any text they want.
- 10. **Storage Field** assigns the internal database storage. It is only necessary to change this if linking this detail to one of the software's searchable fields found on the **Item Filter**.

Storage Field:	Custom Detail	•
NOTE - Custom	Custom Detail	ds a
NOTE - Custom	Style	1.1
It is important t	Metal Finish	lity
	Metal Color	
	Metal Type	
	Metal Weight	
	Millimeter	
	Size	Bac
	Length	
	Mfg	
	Old Barcode	
	Old Key	
	Serial Number	

- 11. Click **Next** to continue.
- 12. For types Number, Dollar, or Text, the wizard has been completed and detail created.
- 13. For the type **List**, if you selected **Create New List** the next screen allows you to create your list of choices.

Item Details Wizard	
Item Details Wizard	Ê
List Name: Metal_100	
Use Add/Remove buttons to customize list. Each va and a Long Value (spelled out).	alue must have a Short Value (abbreviation)
Short Value	Long Value
14k	14k
18k	18k
ss	Sterling Silver
s	Silver
Add Remove	Move Up Move Down
	< Back Next > Cancel

14. If you selected **Existing List** instead, use the drop-down to choose which list to use.

tem Details Wizard			
Item Details Wizard			Ê
Modify For All Categories Modify List for Cate List: Item Style.Chains      ×	gory 100 - Diamo	ond Engagement F	lings
Current List Values (Short Value: Long Value): Marine: Marine Bead: Bead Cable Link: Cable Link	^		
Fancy Link: Fancy Link Foxtail: Foxtail Greek Key: Greek Key			e
Bangle: Bangle			
Herringbone: Herringbone			
Mesh: Mesh			
Open Link: Open Link			
Solid Rope: Solid Rope Tennis: Tennis			
Oval Link: Oval Link			
	$\checkmark$		
	< Back	Next >	Cancel

15. After selecting a **List**, choose one of the **Modify** options at the top:

Modify for AllMaking changes to the list entries will affect all category details linked to thisCategorieslist.

Modify List for theMaking changes to the list entries will only affect the selected category.Selected CategoryOther categories will be unaffected.

16. Click **Next**. Make any desired changes to the list values and then complete the wizard to create the detail.

## **Copying a Detail**

Details can be copied from one category to another. There are two methods available:

#### From the Wizard

To copy a detail using the wizard:

- 1. Click **Create** next to the detail to open the wizard.
- 2. Choose Copy From Another Detail.
- 3. Select which Category to copy from and then use the Name drop-down to select which detail to copy.
- 4. Complete the wizard.

#### From Category Record

Details can be copied and applied to other categories directly from the category record. To do so:

- 1. Click Inventory > Categories > List and Edit the category that you wish to copy details from.
- 2. Click **Copy To** at the bottom.
- 3. Use the drop-down at the top to select which categories to copy to, then select which details you wish to copy to them.

4. Click **Copy**.

## **Editing a Detail**

To edit an existing detail:

- 1. Click Inventory > Categories > List and Edit the category.
- 2. Click on the **Details** tab.
- 3. Click the **Edit** button next to the detail you wish to change.
- 4. Select **Edit** and click **Next**.
- 5. Editing a detail follows the same workflow as creating a new detail; review the above section on Creating a Detail to make changes.

## **Deleting a Detail**

To delete an existing detail:

- 1. Click **Inventory > Categories > List** and **Edit** the category.
- 2. Click on the **Details** tab.
- 3. Click the **Edit** button next to the detail you wish to delete.
- 4. Select **Delete** and complete the wizard to remove the detail.