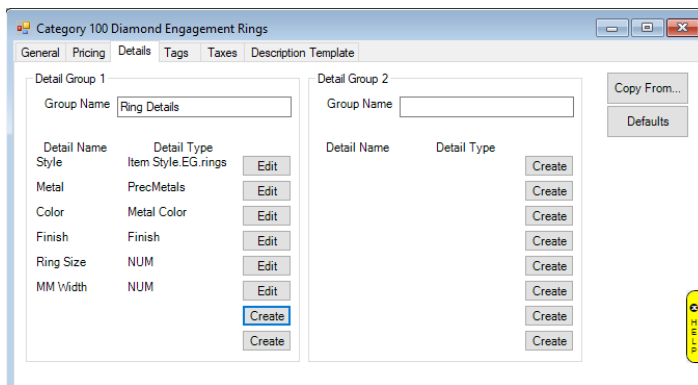# Item Detail Wizard

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.

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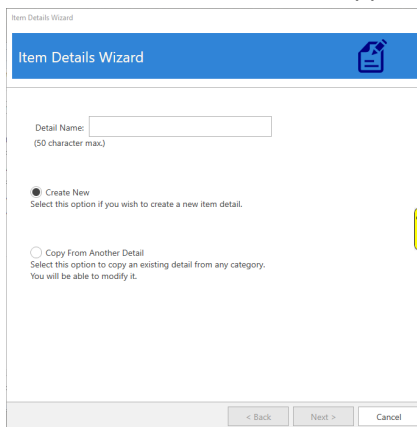
5. Specify a **Detail Name** (e.g. Metal), select **Create New**, and click **Next**.
6. Select a **Detail Type**:

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.**

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**.

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.

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

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

Modify for All Categories	Making changes to the list entries will affect all category details linked to this list.
Modify List for the Selected Category	Making changes to the list entries will only affect the selected category. Other 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.