



# User Guide

## Item Attributes for Dynamics 365

Last updated: November 10, 2022

**TABLE OF CONTENTS**

- 1. About ..... 3**
- 2. Basic Setup ..... 4**
- 3. Functionality ..... 6**
  - Mass Updating or Adding Item Attribute Values ..... 6**
  - Item-by-Item Attribute Assignment ..... 7**
- 4. Reporting ..... 9**
  - Generate Aggregated Item Attribute Reports ..... 9**
  - Import Error Reports ..... 10**
- 5. Security ..... 11**
- 6. Registration ..... 12**

## 1. ABOUT



The Item Attributes for Dynamics 365 Business Central allows users to set up multiple attributes and characteristics for an inventory item. With this tool, users can create up to fifty attributes for their inventory items, and then assign a code or name to that attribute for the item. Users can then export their item attributes to excel and update item attributes through excel imports.

For more information, please go to <https://www.websan.com/item-attributes-for-dynamics-365> .

## 2. BASIC SETUP

This section covers the basic system setup needed to create new item attributes and how to assign them to single items. These steps should be completed prior to using the Item Attributes for Dynamics 365 App.

To set up a new item attribute, first search for “Item Attributes” and select Item Attributes – Lists.

Go to Pages and Tasks

> Item Attributes
Lists

This will open the list of item attributes available in Microsoft Dynamics 365 Business Central. To create a new item attribute, select the New button. Then, enter a Name and Type.

Name	Type	Values	Blocked
→ <a href="#">Colour</a>	Option	Red,Orange,Yellow,Green,Blue,Violet,Purple,...	<input type="checkbox"/>
<a href="#">Depth</a>	Decimal	–	<input type="checkbox"/>
<a href="#">Width</a>	Decimal	–	<input type="checkbox"/>
<a href="#">Height</a>	Decimal	–	<input type="checkbox"/>

In this example, an item attribute named Material with a Type “Option” was created. To create values for a new item attribute, select Item Attribute Values.

### Material

Item Attribute Values
Translations
More options

Name .....  Values .....

Type .....  ▾

Blocked .....

Enter the values that will be associated with this new attribute. This will automatically save.

Material 📄 ↗

---

Item Attribute Values | 🔍 Search | + New | **📄 Edit List** | 🗑 Delete | 🗂 Translations ... | 📄 🔍 ☰

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Value	Blocked
Plastic	<input type="checkbox"/>
Metal	<input type="checkbox"/>
Rubber	<input type="checkbox"/>
→	<input type="checkbox"/>

The item attribute setup process is now complete. This new item attribute is ready to be assigned to single items.

Item Attribute 📄 ↗

📄 🔍 + 🗑

✓ Saved 📄 ↗

# Material

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📄 Item Attribute Values | 🗂 Translations | More options

---

Name .....  Values .....

Type .....  ▾

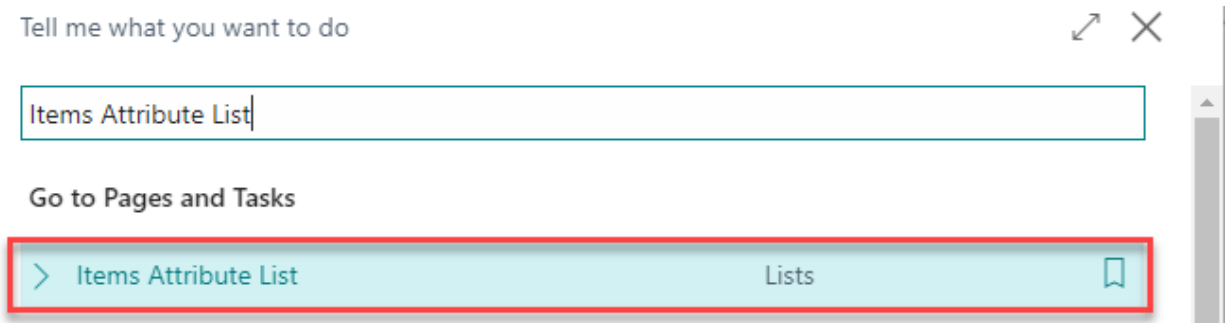
Blocked .....

### 3. FUNCTIONALITY

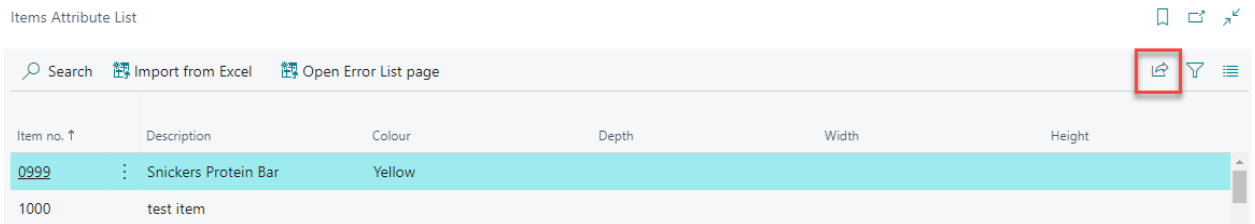
#### Mass Updating or Adding Item Attribute Values

To do a mass update or addition of item attribute values:

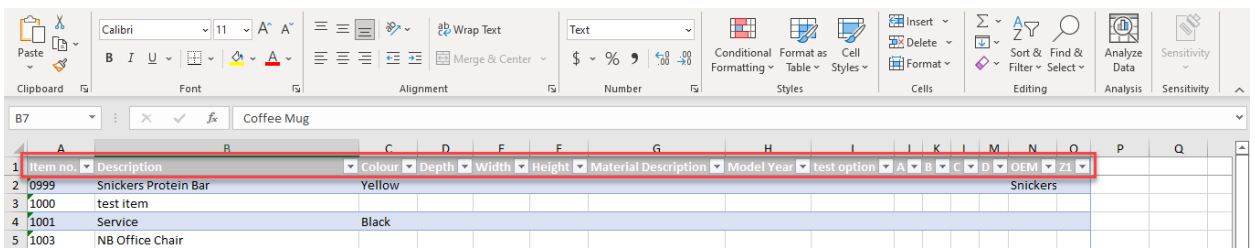
- i. Search the Items Attribute List.



- ii. Download the Microsoft Excel template simply by exporting an Item Attribute List from Business Central.



- iii. Make sure the template used in your import follows the same formats and columns. Items and Attributes must all already exist in Business Central. The import will reject invalid options not in the system set up. Refer to the Basic Setup section of the present documentation to learn how to set up attributes and values.



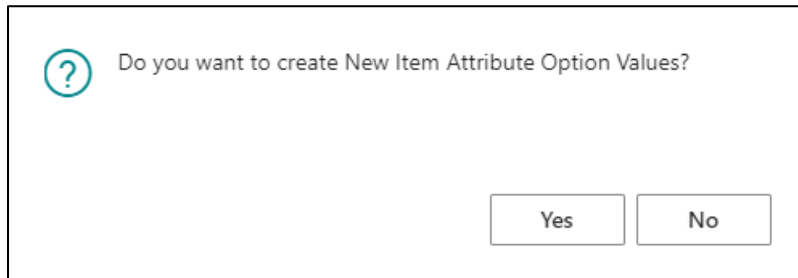
- iv. Enter the Attribute Value changes or additions in the template.
- v. In the Item Attributes List window, select Import from Excel.

Items Attribute List

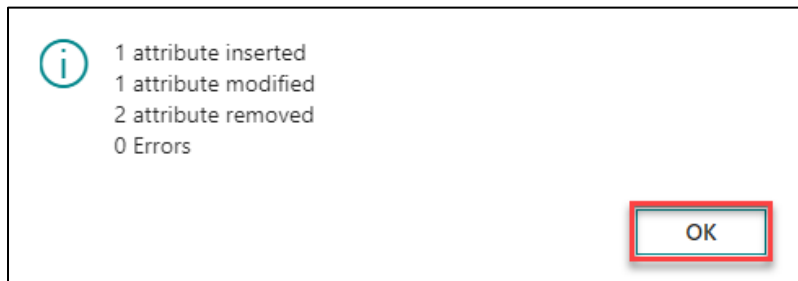
Search Import from Excel Open Error List page

Item no. ↑	Description	Colour	Depth	Width	Height
0999	Snickers Protein Bar	Yellow			
1000	test item				
1001	Service	Black			

- vi. A dialog box will appear, select Yes if a new inventory item attribute value will be added. Otherwise, select No to continue.



- vii. In the dialog box that appears, select Choose to navigate to the location of the updated Microsoft Excel template file. Select it and open it.
- viii. A window outlining the details of the update process will appear. Select Ok to continue and finish the mass update process.



Note that this functionality allows entering or modifying up to fifty attributes for a single inventory item.

### Item-by-Item Attribute Assignment

Alternatively, user can assign attributes item by item by following the next steps:


- i. Search an item.
- ii. Open its Item Card (shown in the image below).
- iii. Select Item > Attributes.

## 1006 · Coffee Beans

Process **Item** Prices & Discounts Request Approval More options

Comments Attachments **Attributes** Adjust Inventory

No. 1006 Cost Type  
 Description Coffee Beans GTIN  
 Blocked  Item Category Code FURNITURE  
 Type Inventory Service Item Group  
 Base Unit of Meas... PACK Automatic Ext. Texts   
 Show in VJS  Common Item No.  
 Last Date Modified 8/24/2022 Purchasing Code

Picture 

- iv. In the Attributes window, click on the Attribute field to display the drop-down menu and choose an attribute. Follow the same steps for the Value field.

**Edit - Item Attribute Values - 1006 · Coffee Beans**

Item Attribute Values Manage

Attribute ↑	Value	Unit of Measure
→ Colour	<input type="text" value=""/>	

Value

- Black
- White
- 
- Brown
- Neon
- Negro

+ New Select from full list

- v. After all the corresponding attributes and values have been selected, click OK to save and exit.

Attribute ↑	Value	Unit of Measure
→ Colour	Black	

**OK** Cancel

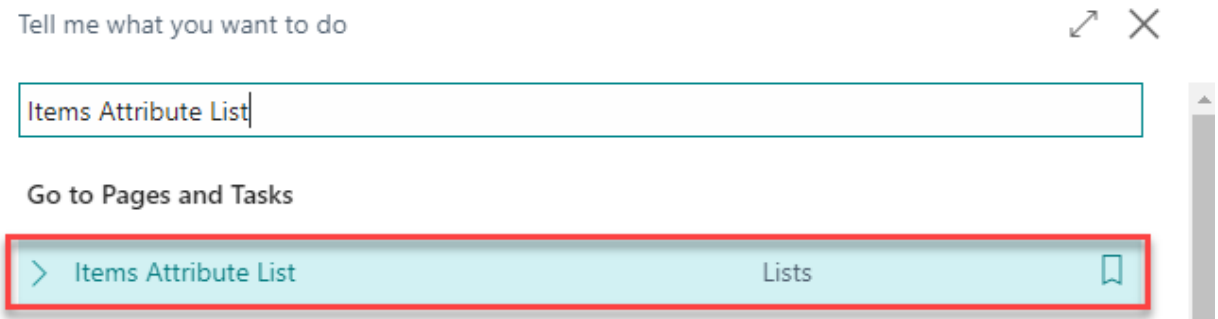


## 4. REPORTING

The Item Attributes for Dynamics 365 App allows users to easily generate reports of all the inventory item attributes set up in Business Central. This reporting capability offers a convenient way to see attributes for all inventory items in a single window. Also, the Items Attribute Error List supplies insights into data inconsistency or mistakes that may occur during the data entry step of the mass update process.

### Generate Aggregated Item Attribute Reports

To generate an Item Attribute report, search the Items Attribute List.



A list of the attributes for all inventory items will appear.

Items Attribute List

Search Import from Excel Open Error List page

Item no. ↑	Description	Colour	Depth	Width	Height
0999	Snickers Protein Bar	Blue			
1000	test item	Red			
1001	Service	Black			
1003	NB Office Chair				
1004	NB Office Desk	Black			
1005-N	Coffee Mug		10	10	10
1006	Coffee Beans				
1007	Coffee kit				
1008	assembly on stock				
1009	PAXIS COFFEE MUG				
1010	PAXIS COFFEE BEAN				
1011	PAXIS COFFEE Kit Assembly to ...				

In this window, the user can perform various standard tasks, including searching specific items, exporting data into different formats, filtering, and displaying the information as a list or tiles.

## Import Error Reports

During the mass import process, if a user chooses not to create new item attribute option values (refer to Step 6 of the section Functionality > Mass Updating or Adding Item Attribute Values) and a new attribute added by mistake, the import will generate an error.

To access the Items Attribute Error List, after an import, select Open Error List page.

Items Attribute List

Search Import from Excel **Open Error List page**

Item no. ↑	Description	Colour	Depth	Width	Height
<u>0999</u>	⋮ Snickers Protein Bar	Blue			
1000	test item	Red			
1001	Service	Black			
1003	NB Office Chair				
1004	NB Office Desk	Black			
1005-N	Coffee Mug		10	10	10
1006	Coffee Beans				
1007	Coffee kit				
1008	assembly on stock				
1009	PAXIS COFFEE MUG				
1010	PAXIS COFFEE BEAN				
1011	PAXIS COFFEE Kit Assembly to ...				

A list of all the errors that occurred during the import process are found here.

Items Attribute Error List

Search

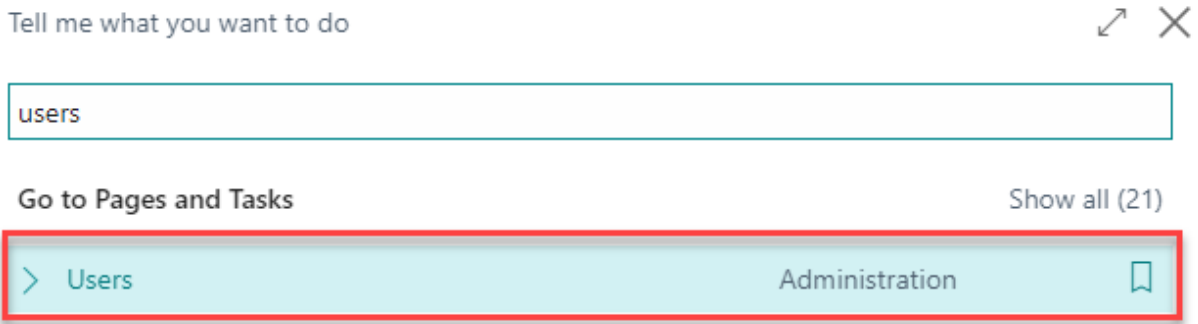
Item no. ↑	Description	Attribute Name ↑	Error Message	Attribute Value
<u>1003</u>	⋮ NB Office Chair	Colour	Invalid Attribute value : Brown	Brown
1004	NB Office Desk	Colour	Invalid Attribute value : Blac	Blac

## 5. SECURITY

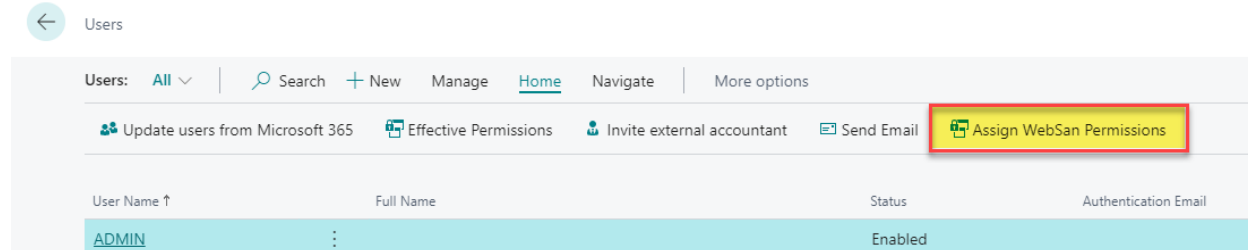
The Item Attributes for Dynamics 365 App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.



In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



## 6. REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.

Tell me what you want to do ↗ ✕

websan client information

Go to Pages and Tasks

> WebSan Client Information Administration 🔖

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.

✎ 🔗 + 🗑️ ✓ Saved 🔖 🔄 ↗

### WebSan Client Information

📄 Transmit Data

#### General

MS Client ID ..... On Hold .....

Active .....

#### Contact Information

Company ..... *	PostalCode / ZipCode *
Name ..... *	Country ..... *
Address ..... *	Phone .....
Address2 .....	Email .....
City ..... *	Email CC .....
Province / State ..... *	Billing is Same as Co... <input checked="" type="checkbox"/>