aACE Software

Replacing an LIC with Another of a Different Record Type

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> This guide explains how to correct the situation where a line item code (LIC) was initially created with an incorrect LIC record type. It is intended for intermediate-level users.

Most details on your LICs can be edited easily; however, the record type is different. Complex logic is associated with each LIC record type. Once it is set for a record, it cannot be changed. Instead you must create a new LIC record to replace the old, incorrect record.

Manually Replace a Single LIC

1. Navigate to the Line Item Codes module and locate the LIC that has the incorrect record type.
2. Edit that LIC, updating the code with a prefix to identify these items (e.g. "X-"). This segregates the record so your team will know to not select it, helps maintain a complete audit trail, and enables you to reuse the original code for the new LIC.
3. Create a new LIC with the correct record type, using the original Code, Description, and other details that need to be carried over from the original record.
4. Update any BOMs, order upgrades/alternatives, or other records to ensure they reference the new LIC.
5. Deactivate the old LIC (https://aace5.knowledgeowl.com/help/deactivating-a-line-item-code).

Replace a Batch of LICs

You can leverage the import process (https://aace5.knowledgeowl.com/help/importing-records) to retire multiple LICs and add multiple LICs at one time.

1. Navigate to the Line Item Codes module, then filter the list view to display only the items that need to be updated.
2. Click **Actions** > **Add Prefix to Code for Line Item Codes in List** .
3. Enter a prefix to identify these items (e.g. "X-") and click **Add**.
4. Click **Actions** > **Export Line Item Codes**, making sure the file Type is an Excel worksheet.
5. Open the spreadsheet and update the data for the *new* LICs, including:
   - For the Line Item Code column, remove the prefix you added.

- For the Line Item Code Rec Type column, enter the correct record type.
  Note: The values for this column must match the import validations: ITEM, INVENTORIED ITEM, ASSEMBLY ITEM, INVENTORIED ASSEMBLY ITEM, TIME, EXPENSE, or OTHER.

6. At the Line Item Codes module, click **Actions** > **Import Line Item Codes** > **Step 3**, and complete the import process (https://aace5.knowledgeowl.com/help/importing-records).

7. Update any BOMs, order upgrades/alternatives, or other records to ensure they reference the new LICs.

8. Deactivate the old LICs (https://aace5.knowledgeowl.com/help/deactivating-a-line-item-code).