aACE Software

Working with Alts and Upgrades

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Alternates (Alts) and upgrades are substitute items or complimentary items for other line item codes (LICs). You can use alts and upgrades to discuss possible options with a customer or to quickly handle situations where there is insufficient inventory of a certain product. Alts and upgrades are configured from the Line Item Codes module (see below), but you use alts and upgrades from the Orders module:

Using Alts as Substitute Products

1. From an order that includes an LIC with alternate items, click the number in the Alts column.
2. From the Options Selector, click the desired alternate line item code.
   aACE removes the initial LIC and enters the alternate LIC on that line.

Using Upgrades as Complimentary Products

1. From an order that includes an LIC with upgrade items, click the number in the Upgs column.
2. From the Options Selector, click the desired upgrade line item code(s).
   aACE places the new LIC(s) on the order with the Description indented below the

parent LIC.

Configuring LICs for Alts and Upgrades

You can organize your existing line item codes for use as alts or upgrades.

1. Navigate from **Menu** > **Order Setup** > **Line Item Codes** and locate the LIC that will be the 'parent' item.
2. At the details view, click **Edit**.
3. At the Options tab, specify the LIC that will be the alternate or upgrade item.

4. Specify the **Quantity** that should be *automatically* entered for each unit of the parent item (if any).
   This quantity sets the numerical relationship between the initial LIC and the alt/upgrade LIC. If the Qty shows a zero, there is no assumed quantity for the child LIC — you must manually enter a quantity when it is added to an order. If the Qty shows one or higher, aACE automatically adds that many child LICs for *each unit* of the parent LIC. For example, suppose an LIC was added as an upgrade option with a quantity of two. In an order that included one unit of the parent LIC, aACE would automatically enter two as the quantity for the upgrade LIC. If the user increased the units of the parent LIC on the order to two, aACE would automatically increase the upgrade LIC to four (i.e. two for each of the parent items).
5. Mark the flag for **Alternate** or **Upgrade**.

6. Click **Save**.

Reviewing LICs that Have Alts or Upgrades

You can see which line item codes already have alternatives or upgrades assigned to them by navigating to Menu > Order Setup > Details > LI Code Options. Then search using the Option Rec Type column: