

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:

The screenshot shows the 'Orders' module interface for order 50031. The order is for 'Queens County School District' and is dated '01/13/20'. The order status is 'PENDING'. The interface includes sections for 'Bill To', 'Ship To', 'Order Items', 'Sales', and 'Fulfillment'. The 'Order Items' table is the focus, with a red circle highlighting the 'Alts' and 'Upgs' columns for the first two items.

Line	Type	Line Item Code	Description	Qty	Alts	Upgs	Quantity	BO	DS	SO	Unit Price	Adjustment	Extended Price	Total	Tax Profile
1	Technology	Tbit-1	Student tablet, 7" screen	42	1	1	1				449.00	0.00	449.00	449.00	DEF
2	Technology	Tbit-2	Student Tablet, 8" screen	465	1	1	1				499.00	0.00	499.00	499.00	DEF

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.

The screenshot displays the 'Line Item Code' configuration page for 'TB-LIT104' (Shakespeare's Comedies). The 'Options' tab is selected, showing a table of related line item codes. The table has the following structure:

Line Item Code	Description	Quantity	Alternate	Upgrade	Notes
TB-LIT106	Shakespeare's Tragedies	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

The 'Quantity' field for the alternate item is circled in green. Below the table, there are 'Preferences' and 'Options' sections with various checkboxes and input fields.

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:

Type	Line Item Code	Option	Option Type	Option Rec Type	Quantity	Unit Est Cost	Option Total
ALTERNATIVE							
> Technology	Tech-001a	> Tech-001	Technology	ALTERNATIVE	0	5,051.50	0.00
> Technology	TbIt-2	> TbIt-1	Technology	UPGRADE	1	275.00	275.00
> Technology	TbIt-1	> TbIt-2	Technology	ALTERNATIVE	1	300.00	300.00
> Printer	BOM-ZT-B	> BOM-ZT-W	Printer	ALTERNATIVE	1	0.01	0.01
> Printer	BOM-ZT-W	> BOM-ZT-B	Printer	ALTERNATIVE	1	0.01	0.01
ALTERNATIVE							575.02
UPGRADE							
> Workshop	WS-SSA-P	> WS-SSA-C	Workshop	UPGRADE	0	500.00	0.00
> Workshop	WS-SSA-P	> WS-SSA-S	Workshop	UPGRADE	0	250.00	0.00
> Technology	TbIt-2	> TbIt-8C	Technology	UPGRADE	1	14.99	14.99
> Textbook	TB-FRNCH3	> TM-FRNCH3	Textbook	UPGRADE	0	74.99	0.00
> Textbook	TB-FRNCH3	> WB-FRNCH3	Textbook	UPGRADE	1	19.99	19.99
> Technology	TbIt-1	> TbIt-7C	Technology	UPGRADE	1	12.99	12.99
UPGRADE							47.97
List Totals							622.99